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منظمة السياحة العالمية



Tourism and Migration

Exploring the Relationship between
Two Global Phenomena

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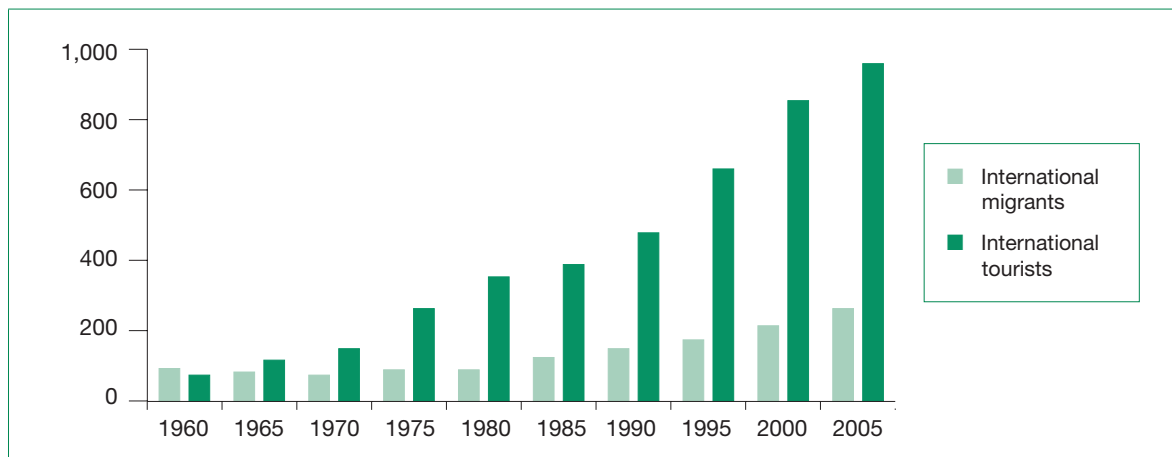
This report commissioned by the World Tourism Organization (UNWTO) is a collaborative effort between 5 experts from the Université de la Méditerranée (France), University of Asia and the Pacific (Philippines), Katowice School of Economics (Poland) and Dunira Strategy (Scotland, United Kingdom). Led by Mr. David Diaz Benavides, the researchers were Messrs. Benjamin Carey, Henryk Handszuh, Christopher Imbsen and Mrs. Maria Cherry Lyn Rodolfo. The team would like to thank the UNWTO Department of Sustainable Development of Tourism, the Department of Market Trends, Competitiveness and Trade in Tourism Services, the Documentation Centre and its Elibrary, as well as the individual UNWTO staff that contributed to the discussion of the terms of reference and contents of the report and provided useful feedback and guidance.

The opinions and conclusions expressed in this report however are the responsibility of the team of researchers and do not represent or compromise the official positions of either the UNWTO or the researchers' own institutions and organizations.

Executive Summary

Growth in migration and tourism are two of the most significant manifestations of globalisation (figure 1). Both involving the movement of people, migration and tourism are related, but there has been very little research into their relationship. This UNWTO study therefore seeks to explore the linkages between migration and tourism as an important baseline study in the investigation of opportunities indicated by the relationship between these two global phenomena.

Figure 1 Comparison of international migration and tourism by number of arrivals, 1960-2005 (million)



Source: World Tourism Organization, World Bank.

Migration makes important social and economic contributions to destination countries, culturally enriching their society, enhancing the tourism product and providing labour for the travel, tourism, hospitality and catering sectors. Two distinct concepts are indicated, which can be defined as 'Tourism-led Migration' (TLM) and 'Migration-led Tourism' (MLT).

The growth in international tourism and mobility has given rise to TLM. Examples include the movement of young people from central Europe to fill tourism employment gaps in western Europe and the migration of male labourers from South Asia to meet the construction demands of the tourism boom in the United Arab Emirates (UAE). Other relevant examples include pensioner migration in Asia and new residency for owners of 'second homes' in western Europe and North America. At the same time, migration has led directly and indirectly to significant growth in tourism to both origin and destination countries through increased visibility, especially in the 'Visiting Friends and Relatives' (VFR) sector, and to the development of new tourism infrastructure and transport routes in and between countries.

The concept of tourism associated with migration is MLT and it is estimated that in the case of countries with net emigration, the value of 'home visits' by non-resident migrants is at least 15% and in some cases (most notably in Central America) exceeds 70% of total inbound tourism. MLT therefore makes a significant economic contribution to origin countries, as well as cementing strong international networks that lead to partnership development and investment in new enterprises (including tourism businesses) by the family and associates of migrants and by migrants remotely and on their return. As well as generating remittances for subsistence, which are generally considered the main value of migration for origin countries, migration therefore also creates funds for investment, establishes networks of entrepreneurs and builds local capacity through cultural exchange and the adoption of business know-how.

There are however some negative aspects and consequences (both real and perceived) of the relationship between tourism and migration, such as ‘brain drain’ and reduction in tax revenues in origin countries and wage deflation and social tension in destination countries. Nevertheless, it can be argued that these all represent opportunities that can be harnessed by the public and private sectors, although in some cases there is a lack of data available to quantify the opportunity. This means that there is a need to improve data capture through the adoption of common standards, especially in relation to VFR tourism and non-resident return visits, and in the short-term through targeted research and enhanced data collection in selected countries.

In both origin and destination countries, there is an opportunity to better understand migrant profiles in order to inform marketing strategy. In origin countries, enhanced planning could lead to more effective investment and facilitate the return of highly skilled migrants. In destination countries which are members of the Organization for Economic Co-operation and Development (OECD), enhanced understanding of tourism gaps in the labour market could lead to changes in immigration policy and visa arrangements, which would benefit the tourism sector, increase tax revenues and help to alleviate poverty in Least Development Countries (LDC).

In 2005, the Global Commission on International Migration published a report that encouraged states to maximise positive outcomes of international migration. However, whilst the report included more than 50 references to services (in particular services to be provided to migrants), the tourism-related services are mentioned twice in the context of migrant women and “migrants with irregular status”. At the same time, the Commission emphasised the importance of remittances, which are a focus of the present report in the context of tourism. In fact, remittances from migrants (US\$ 303 billion in 2006, World Bank (WB)) and tourism receipts (US\$ 742 billion in 2006, UNWTO) nourish daily the world markets and make viable the economic sustainability of the richest and some of the poorest nations in the world.

This present report attempts therefore to contribute to the ongoing debate and research on the contribution of tourism and migrations to sustainable development. An important aspect of research will be to focus on the relationship between tourism and migration with respect to the generation of value added. Case studies in part facilitate this task.

The report presents the conceptual framework for the analysis of linkages between migrations and tourism and the data on workers’ remittances and tourism. It further looks into features and trends of tourism and migration including social, societal and cultural impacts of MLT, national and regional policies in this area. Case studies of China, France, Germany, India, Japan, Philippines, Turkey, United Kingdom, United States of America and Central America illustrate themes and indicate findings, which are the basis of recommendations.

In the course of this study the following key questions are considered:

1. What is the economic impact of emigration on tourism in origin countries?
2. What contribution to the tourism economy is made by immigrant workers in destination countries?
3. What investments are made in tourism in origin countries as a result of emigration?
4. What trends can be identified in tourism-related migration and migration-related tourism?

This study focuses on the implications of migration for tourism. Drawing on this framework, a series of conclusions, presented as specific recommendations, have emerged through an analysis of case studies.

Key Findings and Associated Recommendations

Table 1 Key findings and recommendations

Finding	Recommendation for origin countries	Recommendation for destination countries
MLT can significantly contribute to development and poverty alleviation.	Permit migration and encourage VFR tourism. Avoid overdependence on tourism prospects.	Research migrant profiles and networks in order to develop effective marketing strategy and new revenue streams.
Migrants' remittances can constitute a powerful instrument for enhancing tourism-related investments in basic infrastructures at community-based level or for creating small tourism businesses in the origin countries.	Promote tourism as a target sector for investment of remittances. Avoid 'double taxation' on returning migrants who wish to develop new tourism enterprises. Permit FDI in tourism, but encourage active management by indigenous partners.	Reduce charges and restrictions on remittance transfers. Encourage sharing of know-how in order to promote international partnerships.
Some countries are better at utilising migration flows than others.	Identify areas in which country needs to develop know-how and which can benefit from the promotion of specific emigration programmes.	Identify knowledge and resource gaps and seek to address these through targeted immigration promotion policies.
The lower the level of development in origin countries, the greater the contribution of migration.	Permit migration to areas where there are opportunities to gain relevant know-how.	Encourage cooperative policies to fight poverty in LDC in line with Millennium Development Goals (MDG).
Institutional changes are required to accompany and assist migration flows in order to harness their economic and social benefits, including the field of tourism development.	Negotiate employment conditions and specific apprentice schemes with destination countries.	Trade unions and employer organizations need to ensure protection of migrant workers. Employment rights of native workers should also be extended to immigrant workers. Special protection needs to be given to female immigrants.
Inconsistency of data and diversity of situations prevent to quantitatively demonstrate linkages between tourism and migration.	Differentiate outbound VFR movements and inbound emigrant visits within travel and tourism statistics in order to understand MLT and develop marketing strategies.	Differentiate VFR tourism in order to understand MLT and develop appropriate marketing strategies.
Restrictions on immigration in highly developed countries are restricting tourism development.	Negotiate visa arrangements with key destination countries.	Reconsider 'points' systems that discriminate workers in tourism and hospitality sectors.
Migration from origin countries is leading to a 'brain drain' and 'skill drain' in less developed countries.	Facilitate return of emigrants with tourism management and entrepreneurial skills. Encourage enterprise development.	Provide immigrants working in tourism and hospitality with access to internationally recognized 'certified' training and apprentice schemes.
Diaspora networks represent a critical factor in development.	Maintain official contact with migrant communities.	Engage opinion leaders within immigrant communities as a part of marketing strategy for migration-related tourism.

The complexity of this assignment needs some clarifications regarding the scope and coverage of the report and the conclusions and recommendations it entails. First, the objects of analysis are the flows of international migrant workers and visitors and their ties with their origin and destination, primarily, but not exclusively, from an economic perspective. Second, political refugees and relocation of people for humanitarian reasons are excluded. Third, rather than producing common themes and recommendations, the case studies present a whole diversity of situations between the selected countries concerned representing different levels of development, geographical regions and the categories of migrants, leading to a 'shopping list' of recommendations rather than a single homogenised roadmap.

Introduction

Growth in migration and tourism are two of the most significant manifestations of globalisation. Both involving the movement of people, migration and tourism are related, but there has been very little research into their relationship. This study therefore seeks to explore the linkages between migration and tourism as an important baseline study in the investigation of opportunities indicated by the relationship between these two global phenomena.

This study focuses on the implications of migration for tourism. Drawing on the framework presented in Chapter 1, a series of conclusions will emerge through an analysis of case studies in Chapter 2, followed by specific recommendations and proposed actions.

In the course of this study, the following key questions (together with a number of associated hypotheses) are considered:

What is the economic impact of emigration on tourism in origin countries?

- There is a strong relationship between migration from a country and growth in VFR tourism to that country.
- Tourism from destination markets to origin markets increases in line with migration from the origin market to the destination market.
- Expat¹ tourists spend more than domestic tourists when visiting their home country.

What contribution to the tourism economy is made by immigrant workers in destination countries?

- A significant proportion of migrant workers is employed in travel, tourism and hospitality sectors.
- Immigration can lead to social problems in destination countries.
- Immigration contributes to the development of new cultural tourism products², enriching the cultural environment of destination countries.
- Economic opportunities for TLM are different for men and women.

What investments are made in tourism in origin countries as a result of emigration?

- A significant proportion of expat investment in their home countries is in the travel, tourism and hospitality sectors.

1 The term 'expat' is used throughout this study as an abbreviation of 'expatriate' from the Latin *ex patria* to refer to people residing in a country in which they were not born or brought up and (usually) have retained citizenship of their original country and (sometimes) adopted dual nationality, making measurement of movements in this category extremely difficult, especially when this also extends to subsequent generations.

2 Examples include ethnic food and cuisine becoming more available in shops and restaurants, introduction of new cultural events and even the enrichment of legal systems and choice of wedding ceremonies.

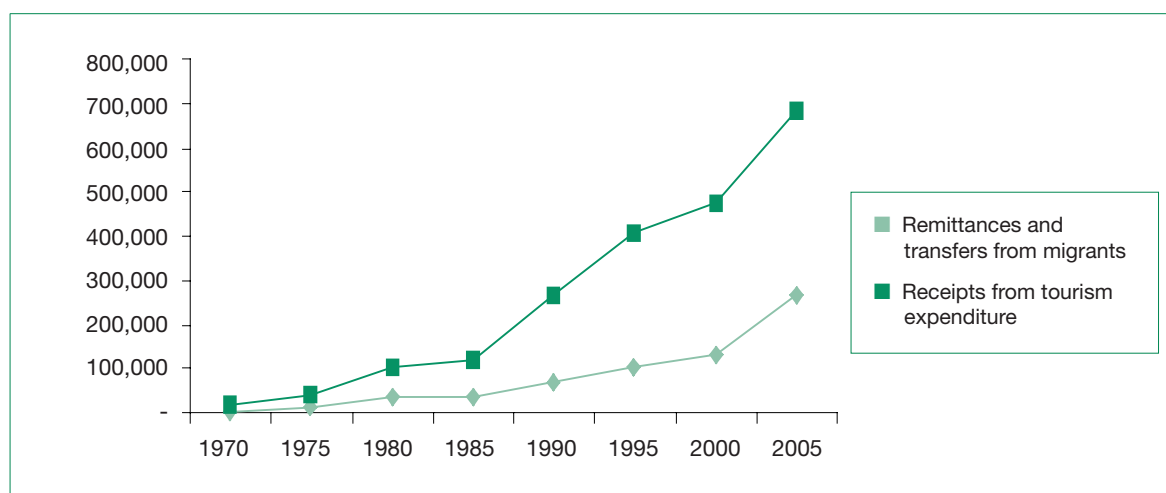
- In origin countries, there is a clear progression in the use of remittances from ‘basic needs’ through ‘demand for consumer goods’ to investment in ‘education and enterprise’.
- The beneficial value and enterprise opportunity of remittances accrue differently according to the gender of recipients.

What trends can be identified in tourism-related migration and migration-related tourism?

- Tourism in destination countries is increasingly dependent on migrant labour.
- Affinity and kinship relationships are increasingly important in the marketing of origin countries.

In October 2005, the Global Commission on International Migration³ published a report, which provided a thorough analysis of the migration phenomenon, its roots, causes and effects, and focused primarily on its development and human rights dimensions. In its overall conclusion, the Commission encouraged states to maximize positive outcomes of international migration, called for its informed governance and international cooperation, in particular through the activities of an Inter-agency Global Migration Facility, and adopted principles for action and recommendations. While the report includes more than 50 references to services (in particular services to be provided to migrants), tourism-related services are mentioned, in passing, no more than twice, in the context of migrant women and “migrants with irregular status”⁴. At the same time, the Commission dwelled extensively on the importance of remittances which are also one of the foci of the present report in the context of tourism. In fact remittances from migrants (US\$ 303 billion in 2006, WB) and tourism receipts (US\$ 742 billion in 2006, UNWTO) nourish daily the world markets and make viable the economic sustainability of the richest and some of the poorest nations in the world (figure 2).

Figure 2 Comparison of global remittances and tourism receipts, 1970-2005 (US\$ million)



Sources: World Tourism Organization, World Bank.

3 Created in December 2003, it acted on the encouragement of UN Secretary General Kofi Annan and throughout the process included a Core Group of 32 states and the European Union.

4 1. “[...] demand in the industrialized states for labour in sectors that are traditionally associated with women: domestic work, nursing and personal care services, cleaning, entertainment and the sex trade, as well as retailing and labour-intensive manufacturing” (paragraph 20, p.14);

2. “In some parts of the world, certain sectors of the economy, including agriculture, construction, hotel and catering services, as well as domestic and sex work, have come to rely to a significant extent on migrants with irregular status...” (in: Global Commission on International Migration (2005), ‘Chapter 1: A World of Work: Migrants in a Globalizing Labour Market’ and ‘Chapter 3: The Challenge of Irregular Migration: State Sovereignty and Human Security’, in: Migration in an Interconnected World: New Directions for Action).

The present report attempts therefore to contribute to the ongoing debate and research on the contribution of tourism and migrations to sustainable development. An important aspect of research will be to focus on the relationship between tourism and migration with respect to the generation of value added. The case studies in part facilitate this task.

The report consists of three major parts: the first presents the conceptual framework allowing analysis of the linkages between migrations and tourism and the data on workers' remittances and tourism. It further looks into features and trends of tourism and migration including social, societal and cultural impacts of MLT, national and regional policies in this area, as well as trade and investment agreements, such as free trade agreements (FTAs), regional trade agreements (RTAs), economic unions, and economic partnership agreements (EPAs). Other aspects, such as trade and investment-related issues in connection with General Agreement on Trade in Services (GATS) mode four (M4), and the international agenda of Tourism and Migrations, will be also discussed. The second part consists of the application of the common framework to case studies representing selected countries: China, India, Japan and Philippines, Central America and the United States of America, France, Germany, Turkey and the United Kingdom. Some final remarks include conclusions and recommendations, as well as suggested guidelines to configure a road map to any future work regarding policies and measures to be undertaken by the international community and governments in order to maximize the benefits that MLT flows may accrue in particular to the local communities which are both sending and hosting migrants and international visitors.

Context

This chapter:

- Summarises key facts, matters and features of tourism and migrations and inter-linkages between them.
- Defines the rationale and scope of the study, working hypotheses, analytical tools, case studies, conclusions and recommendations.

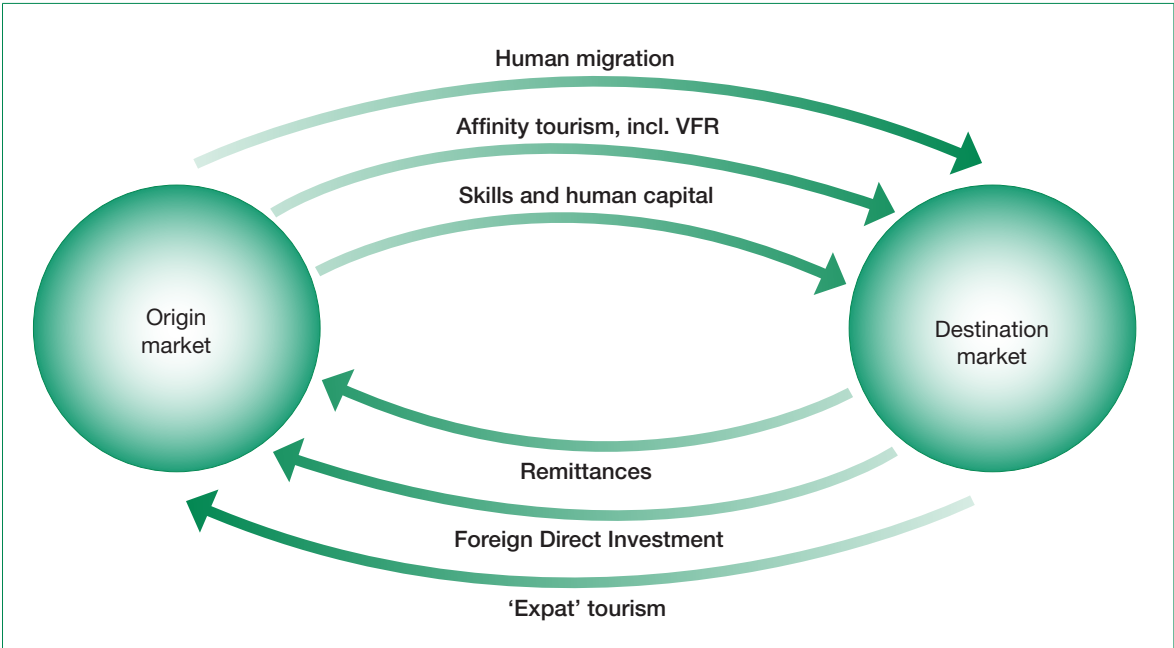
1.1 Introduction

This chapter defines concepts and explores primary motivations for migration, including demands for labour and opportunities for enterprise that emerge as a result of tourism development, and for tourism, especially in relation to tourism that is fuelled by migration. It considers and critically assesses the impacts of migration on tourism flows and other tourism-related developments, such as job creation and investment in the tourism sector, diversification of the tourism product and acquisition of new technologies, from the development perspective of migration in origin and destination markets. In the course of this study, common factors and themes are identified which determine and define these impacts in order to consider areas for intervention and other policy recommendations.

1.1.1 Interfaces of Tourism and Migration

The following diagram (figure 3) illustrates the 6 main transactions involved in tourism and migration.

Figure 3 Main transactions involved in tourism and migration



Source: Dunira Strategy.

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1.1.2 Impacts of Tourism and Migration

Table 2 indicates a range of both positive and negative impacts associated with the 6 key movements involved in tourism and migration.

Table 2 Impacts of tourism and migration

Movement/flow	Origin country	Destination country
Migration	Economic contribution through remittances and migrant investment Cultural exchange 'Brain drain' (short/medium term) Savings on health and social security provision Reduction in tax revenues	Economic contribution Cultural enrichment Additional pressure on social and economic structures Competition leading to wage reduction (short term) Counteracting population decline and ageing Increased tax revenues and consumer spending Crime and human trafficking Social conflict
Affinity tourism with emphasis on 'VFR'	Increased visibility in destination market Increased return vfr tourism Reduction in domestic market	Increased international markets Enhanced visibility in origin markets
Skills and human capital	Increased access to knowledge and credit through diaspora networks Future skills enhancement and emergence of new class of entrepreneurs (if migrants return) Loss of professional skills Enhanced technology through knowledge transfer from overseas migrants	Packages to attract fresh talent Enhanced language skills Enhanced cultural sensitivity in tourism industry Increased 'overseas' fees for educational institutions
Remittances	Additional revenue, contributing to increased consumer spending	Demand for financial services
FDI	Well-informed investment in travel, tourism and hospitality New investment streams	New relationships and investment partnership opportunities
'Expat' tourism	Higher value visitors	Growth in travel services

1.2 Migration Features and Trends

Migration accompanies tourism and the dynamics of both are similar. From an individual's perspective, their principal vector is the desire to change the usual social and physical environment, for a brief period at least, for some time or forever, but psychological, family, cultural or economic links with the place of origin will always be there. While travel for tourism essentially seeks new experience elsewhere by means of consumption of goods and services from the income already earned, migration seeks another livelihood, i.e. establishing another household combined with a work opportunity or a new professional experience and career development, or reaching the life ideals which the individuals concerned do not perceive to be achievable in the place of origin, and which also will need an economic base in the country of chosen destination. However, migration is not only a feature of highest income countries.

Those countries, in which there is no internal driver or external stimulus for economic development, tend to generate economic migration as a function of poverty, since the prospect of higher standards of living and an expectation of higher wages is one of the main drivers of migration from low-income to middle and high-income countries. A World Bank study asserts that “income proximity (as well as networks) is a major driver of migration from developing to industrialized countries”. The World Bank and United Nations Department of Economic and Social Affairs (UNDESA) estimate that 50% of migrants from developing countries go to other developing countries¹. From a social perspective, migration motivated by the lack of opportunities goes to promises of new openings. Commercial tourism itself has become one of the drivers of emigration by exposing poor communities to apparently wealthy visitors from abroad and thereby suggesting that a better life can be found in those foreign countries. Both tourism and migration are economy-driven, to spend or to earn.

A recent study by the World Bank on migration and remittances² shows that “despite the great variation in the migration patterns across the regions and the extremely complex combination of economic and social motivations for migration, a number of similar motivations seems to underpin the decisions to migrate. International migration is often explained by a basic push-and-pull model: economic conditions, demographic pressures, and unemployment (“push factors”) in the sending countries work in coordination with higher wages, demand for labour, and family reunification (“pull factors”) in the migration receiving countries. With the example of Europe and Central Asia (ECA) countries and based on the traditional migration theory, the same study shows that disparities in GDP per capita among drive migrants to move (legally or illegally) from lower income to higher income countries. The past migrations from Italy, Spain, Portugal and Greece to United States of America and Switzerland and the non-incentive to emigrate due to the impact of the European Union (EU) are explained by the same theory.

Each type of motivation and each combination between them are responsible for the involvement of the migrant’s family at a certain stage of migration. Sometimes a whole family lot or a couple emigrates, but in most cases it is about single person emigration. On the one hand, it is natural that his or her family members or friends left behind may join the migrant. They may also come to stay longer, even permanently, or ‘just for tourism’, i.e. with the purpose of returning home rather quickly and while staying with their migrant, they eat out, indulge in cultural and recreational activities, visit attractions and travel to them especially in the neighbourhood, etc. On the other hand, most immigrants send money back home, but it can be not only by means of remittances earned in the destination’s productive sector, including the tourism one, but also by purchasing tourism goods and services on their own trips to visit their relatives, friends or just sites back old home in their first or subsequent generations of immigrants and their descendants.

There are varying scopes of migration’s interface with tourism and its effects for development, depending on the migrant’s profile or category. In this regard, it is first of all important to bring out elements defining migrants in general, for example as it is done by the United Nations and its specialized agencies, mainly in their international instruments, such as the Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families (1990), and relevant International Labour Organization (ILO) conventions, as well as by the Global Commission on International Migration. Singling out the types of migration should also refer to the categories which should be considered important in view of their pronounced interaction with the tourism sector.

Migrants are people who live – i.e. earn their living or satisfy their daily needs on income earned elsewhere (or even on public funds) – outside the countries of their birth or nationality, and can therefore be described as those who:

- cross the boundaries of their countries (or regions/administrative units in their own country) with a view to establishing their temporary or permanent residence in a place different than the one where they have lived so far or where they were born;

1 E.g. from Haiti to Dominican Republic or from Lao People’s Democratic Republic to Thailand.

2 World Bank (2008), *Migration and Remittances: Eastern Europe and the Former Soviet Union*.

- have done this voluntarily or freely, for reasons of personal convenience and without intervention of an external compelling factor, which also means that they may choose the time when and the place where to go;
- undertake employment or work on their own account in the place to which they have emigrated, which may, but does not need to, be the main reason of their decision to emigrate³;
- have established their residence there as a permanent or temporary home for longer periods without changing their nationality (or citizenship) even though they do not undertake remunerated jobs there.

The first three characteristics may refer to both persons who have adopted a new nationality (or citizenship) of the country of immigration and those who have retained their former nationality. Adopting by them a new nationality does not change their status of immigrants from the economic and hence tourism perspective. Becoming a migrant is a lifelong process that affects all aspects of the lives of those involved.

At the same time, in the context of tourism, people who are refugees or displaced persons or otherwise forced to leave their home and seek refuge or exile outside their countries of origin can hardly be considered as migrants from the tourism perspective, although their 'tourism consumer potential' may change overtime, sometimes contributing significantly to tourism development and cultural enrichment in their new country. This therefore brings into the analysis the migrant status as being regular or irregular (the latter also called "illegal" or "illegal alien"). Whilst most countries distinguish between these categories in their migration policies and statistics, irregular migrants are very difficult to quantify, since very often they are *bona fide* visitors that typically have arrived on a tourist visa and then begin working without a work permit after their entry visa has expired. Others enter the destination country illegally and remain either until their status is legalised or until they are expelled. The contribution of this group is very difficult to quantify, especially because in most countries the hiring of illegal migrants is a criminal act and therefore their employment is not systematically recorded.

1.3 Migrant Categories

Outside tourism, there is no uniformity among countries in defining migration, and the meaning of tourism-related migration as a category separate from migration is not clear. Some national statistics go even to the extreme of calling migration everything which actually appears to be tourism, while no data is published on movements of people who are migrants⁴ other than tourists. What follows is a categorisation of international migrants referring to characteristics as they appear more common in different sources as they also fit to relate them to tourism. UNWTO does not intend to create or define migrant categories for the purpose of this study.⁵

1.3.1 Migrant Labourers

Regular and temporary labour migrants, also known as **guest workers** or **overseas contract workers** (other than highly skilled or business migrants): people who migrate for a limited period of time in order to take up employment, save and send/take money home. Migration is effected in virtue of preconceived contracts, including within international agreements allowing free circulation of labour such as the one

3 In this sense, natural persons who go abroad to provide a service (work) temporarily under the provisions of GATS mode 4, should not be considered migrants. Such persons may eventually become migrants as a consequence of their mobility being constrained due to "illegal" or undocumented resident status. Those providing services under GATS mode 4 are nevertheless of interest to tourism due to their capacity to supply and consume tourism services.

4 Statistics South Africa (2007), Tourism and Migration, Statistical release.

5 Refugees are excluded from this categorisation. Although in some cases they can make the same contribution than legal migrants.

characterizing the European Union. The temporary status of migrants in this case indicates that over time they may become return migrants, 'circular' migrants (transmigrants).^{6,7}

Links with tourism:

- Use of passenger transport to go and return;
- low capacity to receive family visits while working;
- low or middle propensity⁸ to spend on visitor attractions and tourism services in the destination;
- slightly increased propensity to spend on tourism services on return;
- middle propensity to spend on gifts;
- potential to save earned income and/or remit it to the country of origin where it can be used on;
- tourism consumption or investment in the tourism sector;
- low potential to contribute diversity to the supply of tourism services in the destination;
- potential to establish or invest in a tourism operation or property on return to the country of origin;
- promoting the destination to other countrymen on return (call effect)⁹.

1.3.2 Irregular Migrants

Irregular migrants (or **undocumented/illegal migrants**): people who enter a country, usually in search of employment, without the necessary documents and permits.¹⁰

Links with tourism:

- Use of passenger transport by most migrants, however airlines face risks of suffering financial consequences if they carry passengers who are not properly documented;
- no capacity to receive family visits unless in emergency situations;
- accidental capacity to spend on visitor attractions and tourism services;
- low shopping gifts capacity;

6 Their labour market status in the destination is similar to that of "jornalero" (day worker) in Andalucia. Jornaleros would report to appointed places to ask for and accept day or seasonal work in big farms. Over time some of them would take seasonal tourism jobs in the Andalusian coastal resorts or in the Balearics and at the end of the season would live on unemployment benefits in their place of origin. However, being nationals or permanent residents in the same country, they could and can move freely from one area to another, remaining part of the same national workforce.

7 As a sub-category this group includes students who have traditionally been offered some administrative facilities to undertake seasonal employment in other countries during school holidays coinciding with the tourist season, hence most of their jobs have been in the tourism sector. A smaller group within this sub-category would undertake paid training in the tourism sector in virtue of international agreements, and some of the student community would eventually stay longer or permanently in the country of such temporary economic immigration.

8 Middle propensity can be referred to students.

9 This triggered effect is also typical of students.

10 The analysis made in this report on the relation between irregular migration and tourism should not be interpreted as an endorsement or encouragement of irregular immigration. The report however would not have been complete without consideration of this dimension.

- lower potential to save and remit money if employed which is often due to lower labour contract negotiating power;
- high potential to contribute diversity to the supply of tourism services in the destination by means of small independent operations, starting with undertaking irregular jobs related to tourism (e.g. beach vendors);
- social exclusion due to immigrant irregular status causes social problems (homelessness, begging, criminality, unsafe hygiene habits) which affect the destination image and marketability;
- use of irregular and seasonal migrants in the tourism sector workforce lowers the level of service quality delivered;
- irregular productivity effects depending on the type of tourism jobs accessed by irregular migrants: there may be both high and low productivity;
- potential of tourism jobs to get migrants out of social exclusion;
- potential to establish or invest in a tourism operation or property on return to the country of origin if the migrant experience eventually turns out to be successful;
- call effect if migration is successful.

1.3.3 Highly Skilled and Business Migrants

Highly skilled and business migrants: people with qualifications as managers, executives, professionals, technicians or similar, who move within the labour markets of transnational corporations and international organizations, or who seek employment through international labour markets for scarce skills. Many countries welcome such migrants and have special 'skilled and business migration' programmes to encourage them to come.

Links with tourism:

- Use of passenger transport to go and return;
- high capacity to receive family and friends visits;
- high propensity to spend on visitor attractions and tourism services in the destination;
- propensity to spend on tourism services on return similar to the level of spending when abroad;
- high propensity to spend on return gifts;
- high potential to save earned income and/or remit it to the country of origin where it can be used on tourism consumption or investment in the tourism sector;
- potential to contribute diversity and expertise to the supply of tourism service in the destination determined by the type of business represented by the migrant;
- high potential to enhance the destination assets' diversity in the event of direct involvement in tourism operations by individual professionals;
- potential to establish or invest in a tourism operation or property in the country of destination, origin or third country determined by the existence of relevant business opportunities;
- promoting the destination to other professionals and countrymen on return (call effect).

1.3.4 Family Migrants

Family members (or **family reunion/family reunification migrants**): people sharing family ties joining people who have already entered an immigration country under one of the above mentioned categories. Many countries recognize in principle the right to family reunion for legal migrants. Other countries, especially those with contract labour systems, deny the right to family reunion.

Links with tourism:

- Roles similar to the lead migrant category, actually strengthening the tourism and cultural diversity effects, but weakening potential of return to the country of origin;
- it includes a lower volume of remittances, but subsequent trips to the country of origin of the whole family lot known as visiting friends and relatives (VFR) may be strengthened.

1.3.5 Return Migrants

Return migrants: people who return to their countries of origin after a period in another country.

Links with tourism:

- The tourism effect has already been considered in each category commented;
- earlier in the event of the migrant's return;
- some studies suggest that return migrants experience an unemployment rate higher than national average. The tourism sector in the country of return may show a higher potential than other sectors to absorb return migrant workforce thanks to the migrants' acquired ability to interact with other cultures.

1.3.6 Resident Migrants

Resident migrants: people who hold a second residence, which eventually may become their main residence in another country, to which they can freely travel, and where they can live on the income earned in their country of origin.

Links with tourism:

- Frequent use of passenger transport to go and return;
- high capacity to receive family members, relatives and friends;
- high propensity to spend on visitor attractions and tourism services in the destination;
- propensity to spend on tourism services on return similar to the level of spending when abroad;
- high propensity to spend on return gifts;
- employment of local workforce (also consisting of migrant workers) to construct residences and upkeep estate;
- potential to contribute labour, know-how, language skills and new technologies to the local tourism sector;

- potential to establish or invest in a tourism operation or property in the country of destination, origin or third country determined by the existence of relevant business opportunities;
- promoting the destination to other nationals in the country of origin (call effect).

1.3.7 Ethnic Migrants

Former migrants (also **ethnic migrants**): former immigrants, who have established their permanent residence in another country, have become naturalized there by means of permanent residence status or citizenship, and the subsequent generations of their descendents, who culturally identify themselves with their country of origin of the first generation of migrants. It is a very heterogeneous group, partly coinciding with the formerly described migrant categories in the first generation of migrants.

Links with tourism:

- High capacity to receive family members, relatives and friends from the country of origin;
- high capacity to pay visits to the country of origin for a variety of motives (private, religious, cultural, business);
- high propensity to invest in second homes in the country of origin;
- potential to contribute know-how, language and technological skills to the local tourism sector;
- promoting the country of origin among the residents of the country of immigration;
- creating cultural difference in the country of immigration of tourist interest to its other residents and the country of origin.

1.4 Analysis of Categories

The foregoing review of migrant categories of interest to tourism underpins two important characteristics which determine the quality of impact, being the migrants' **ability to establish** in the destination country¹¹, which in turn is related to their **mobility** status. Their varying levels reflect different levels of migrants' social entry and equality vis-à-vis formerly and formally established residents, from the most to the least 'privileged' in the following order:

- Former migrants
- Resident migrants
- Highly skilled and business migrants
- Regular and temporary labour migrants
- Family reunification migrants
- Irregular migrants.

Similarly diverse is the quality of depth of tourism impacts by return migrants that are derived from each of these categories. Each category has a specific potential of its own for contributing to the demand of tourism services and to their supply, including through investment in commercial tourism undertakings, whether for personal end consumption or for commercial benefit (e.g. buying a tourism apartment for personal retirement or renting it to other people).

11 The term in Spanish is known as "*arraigo*".

Under each category, impacts were mentioned with respect to tourism demand and supply in the countries of migrants' destination and origin, including the effect of remittances on the origin countries, where such remittances, whether coming from work in the tourism sector or other sectors, can be used for immediate consumption by families left behind (direct poverty alleviation) or for investment (poverty alleviation through development). In addition, the fact of temporary or permanent loss of migrant labour in the origin country should also be singled out with respect to its effect on the tourism sector in this country. Here again, each migrant category produces a different impact as to its nature and scope. Former migrants are not taken into account and resident migrants cause a neutral effect in this respect, but their temporary absence diminishes the demand for goods and services, including tourism services, in their country of origin. The migration of highly skilled tourism personnel and business people can eventually enhance the tourism sector in their country of origin through direct investment and also as a result of new services that develop to meet the demands of expatriate markets overseas. Regular and temporary migrants can, to a certain extent, balance the national labour market, but when the migration process begins, acute workforce shortages may affect the country and then it may find it necessary to import regular and irregular workers from other countries.¹²

Frequent migrant travel, visits by family members, relatives and friends, and growing remittances show that migration is not only one way traffic. Many reports attest that 'brain drain' associated with better educated citizens of developing countries working in high-income countries is acute in some developing countries, in particular the majority of the least developed countries (LDC). For some countries, such as Mexico, China and India, the temporary migration of highly qualified people brings about benefits from well established diasporas in destination countries. Expatriate knowledge networks have been put in place to support regular contacts, transfers of skills, and opportunities for business with researchers, scientists, and entrepreneurs in the country of origin. A World Bank report¹³ identifies 41 such networks existing in some 30 countries. These networks tend to be rich depositories of talent with high concentration of members with advanced degrees, many earned in the host countries. In addition, developing countries also benefit from the return of well-educated migrants and the contact with technologically sophisticated diasporas.

While regular migrants constantly interface with the tourism commercial sector at various stages of the migration process, a growing number of leisure tourists is engaged in other activities on their trips abroad, especially to developing countries, that goes beyond the conventional consumption of tourism goods and services. In tourist destinations, through solidarity, voluntary or community projects they can donate their skills or even financial aid.¹⁴ Some of these are used to strengthen local tourism operations and their general infrastructure and local community needs, such as water, health, renewable energies, education or agro-projects¹⁵ (each of these areas is also important for creating adequate conditions for receiving commercial tourists). Some tourists in voluntary missions eventually choose to come back or even stay for longer periods in order to sustain the development project concerned. In some African and Latin American countries, there are charities supporting and implementing projects aimed at upgrading basic infrastructure in the local communities.¹⁶ This type of private individuals' aid to poor communities

12 When Poland joined the EU in 2004, its entry was accompanied by an exodus of young workers to several West European countries, especially those (such as the United Kingdom) that signed up to free circulation of labour. This produced acute workforce shortages which affected in particular construction and services, also the ones related to the tourism sector and had to be compensated by immigrant workers from Bulgaria, Ukraine, China, Mongolia, Tajikistan, Uzbekistan and Mexico (Carter Dougherty, 30-6-2008 www.gazeta.pl).

13 World Bank (2008), *Migration and Development Brief 4*, Report.

14 Some of the organizations helping access such projects include:

International Solidarity Movement – www.palsolidarity.org; Sodepaz – www.sodepaz.org; Trenkalòs-Grups en Moviment – www.trenkalos.org; Kvlar Fotoperiodistes – www.fotoperiodistes.org; Servicio Civil Internacional – www.ongsci.org; Waslala – www.waslala.net; Setem – www.setem.org; Solidaridad Internacional – www.solidaridad.org; Asamblea de Cooperación por la Paz – www.acpp.com; Acsur-Las Segovias – www.acsur.org; Acción por un Turismo Responsable – www.turismo-responsable.org; Agencia de Viajes Ismalar – www.ismalar.org.

15 According to media reports, some solidarity – or volunteer – labelled projects may appear as purely commercial undertakings where tourists are not offered real opportunities to contribute to local development in a direct manner (Portinari, B. (2008), 'Vacaciones, sí. Compromiso, también', in: *El País*, 9-8-2008).

16 World Bank (2008), *South-South Migration and Remittances*, Working paper No.162.

abroad is then added to public and official aid. At the same time, official aid is often aimed to specifically prevent individual migration and encourage developing countries to readmit their migrants.¹⁷

The latter demonstrates the desire of governments of the countries importing economic migrants to manage migration, whereby determination and actions by individual migrants to take their destiny in their own hands and emigrate is replaced by indirect state action from outside. In other words, the same states may donate development aid and allow their citizens to undertake unilateral aid actions under the cover of tourism or outside tourism, but at the same time may not, or rather will not, allow people from other countries to attempt to earn their living as immigrants, unless there are special international agreements in place. While it is relatively easy for well-wishing tourists to engage in aid activities – it requires their personal choice and determination and they do not risk excessive red tape –, work migrants wishing, on their own account, to help their families (children, parents) back at home or raise a capital to start an economic undertaking there can by contrast face significant regulatory hurdles in trying to repatriate or invest funds that have been raised overseas. Volunteer tourists are welcome (but also viewed with scepticism in some would-be beneficiary communities), while economic migrants are also often needed, but individually and officially feared in the migrants' destination. Whatever it may be, whether it is difficult or easy to migrate, it will well be seen that migration always interrelates with tourism and generates services and gives rise to financial and human capital flows, and that their directions often cross, meaning that migration accrues benefits to the tourism sector wherever the sector is implanted.

Once immigrants grow in numbers and create their own communities, they tend to generate commercial services related to the characteristics of their own countries of origin, such as ethnic restaurants, grocery and convenience shops, recreational services, travel outlets, telephone and internet cafés, etc. which may be initially aimed at their own members, but are also accessed by the resident public at large. The existence of such facilities may further become an incentive for tourists from the migration origin countries and cultures. Examples are already existing: kosher and halal restaurants and hotels, or those specifically designed and equipped hotel and apartment establishments and rooms so as to meet religious and philosophical needs of their customers.¹⁸

Owing to migration, the tourism sector is therefore used as a vehicle of immaterial flows, such as: transfer of know-how, cultural mediation, and maintenance of ties and creation of networks. At times, the process is strengthened by immigrants associations, also known as Organizations of International Solidarity established in the host countries. Starting with the initial aim of mutual aid and insertion of newcomers, they would subsequently get involved in the projects where immigrants were offered employment, such as public works or infrastructure, which ultimately helped them turn their eye to local development in the South where immigrants' money could also be invested in local projects at no financial loss.¹⁹ This type of work always benefits tourism whose product depends heavily on the quality of local development.

1.5 Migration Data – Global Migrant Stock (GMS)

The GMS measures the bilateral flows of international migrants. Published annually by the United Nations Statistics Division (UNSD) and UNDESA, it is the key measure of migrations. The World Bank also publishes Annual Reports on Migrations, the Fact Book, and a series of studies.²⁰ Other organizations, such as ILO, OECD and International Organization for Migration (IOM), as well as regional development banks publish periodical studies reporting the trends and dynamics of migration in their geographical regions.

17 Commission of the European Communities (2002), *Integrating Migration Issues in the European Union's Relations with Third Countries*, Communication COM (2002) 703 final.

18 E.g. Feng Shui, orientation towards Mecca.

19 Contribution of Mohammed Telhine, "Panorama des migrations internationales et européennes".

20 World Bank, Migration and Remittances, Series of studies.

Data are therefore available on:

- North-North (N-N) migrant flows, i.e. the movements of international migrants among developed countries whether OECD or non-OECD members;
- South-South (S-S) flows, encompassing international migration among developing countries;
- North-South (N-S) and South-North (S-N) flows, including the movement of international migrants from developing to developed countries and vice versa;
- statistics by geographical region (Europe, the Americas, Africa, etc.).

However, the stock of data available from these sources does not reveal specifics about migration relationship or attribution to tourism activities.

In 2005, about 191 million people (3% of world's population) were international migrants. Half of them have moved from developing to developed countries, 3/4 are concentrated in just 28 countries.²¹ Most of the world's migrants live in Europe (64 million) followed by Asia (53 million), North America (45 million) and Africa (29 million). Nearly half of all international migrants are female. However, female migrants outnumber male migrants in developed countries, where they are employed especially in services sectors, including tourism, such as hospitality (other important categories are domestic service and nurses). Two of five migrants from developing countries reside in developed countries. Almost all migration among developing countries is intraregional.

Another picture of the same landscape shows that during 2000-2005, more developed regions of the world gained an estimated 2.6 million migrants annually from less developed regions, or 13.1 million over the whole period. Northern America gained the most from net migration: 1.4 million migrants annually. It was followed by Europe with an annual net gain of 1.1 million and by Oceania with a more modest net intake of 103,000 migrants annually. The net migration rate was the highest for Northern America, at 4.2 migrants per 1,000 inhabitants annually during 2000-2005. Oceania's net migration rate was lower at 3.2 migrants per 1,000 every year, with Europe recording a low 1.5 migrants per 1,000 annually. The net emigration rate was highest for Latin America and the Caribbean, where it amounted to a loss of 1.5 migrants per 1,000 inhabitants annually. For Africa and Asia, the net emigration rates were estimated to be lower, at 0.5 and 0.3 migrants per 1,000 inhabitants every year, respectively.²²

1.6 Migration and Remittances

Remittances²³ represent household income from foreign economies arising mainly from the temporary or permanent movement of people to those economies. For many economies, they represent a sizeable and stable source of funds that sometimes exceed official aid or financial inflows from FDI. Remittances include cash and non-cash items that flow through formal channels, such as across electronic wire, or through informal channels, such as money or goods carried across borders. They largely consist of funds and non-cash items sent or given by individuals who have migrated to a new economy and have become residents there, and the net compensation of border, seasonal, or other short-term workers who are temporarily employed in an economy in which they are not residents.

21 UNDESA (2006), *Migration Report*.

22 UNDESA op. cit.

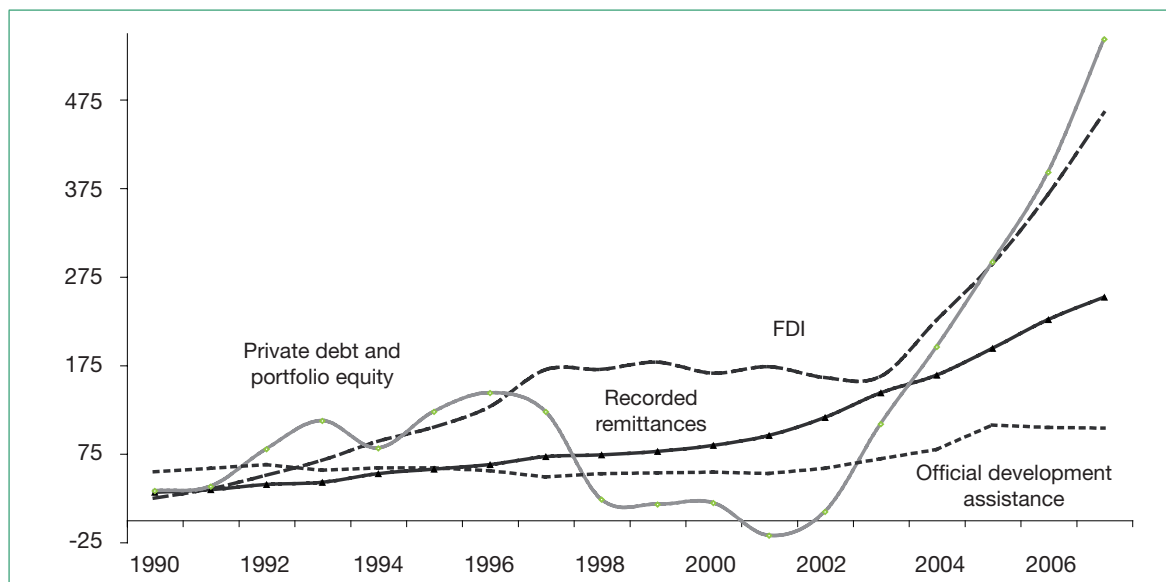
23 The two items in the balance of payments framework that substantially relate to remittances are "compensation of employees" and "personal transfers". Both of these standard components are recorded in the current account. The balance of payments accounts definitions are somewhat broader than this, because they are not based on the concepts of migration, employment, or family relationships. International Monetary Fund (2008), *Draft Balance of Payments and International Investment Position Manual*, Appendix 5.

Table 3 Net capital flows to developing countries, 1990-2007e (US\$ billion)

	1990	1995	2000	2001	2002	2003	2004	2005	2006	2007e
Remittances	31	57	84	95	116	143	163	194	226	251
FDI	25	105	166	173	161	162	226	289	368	460
Private debt and portfolio equity	33	122	19	(17)	9	109	196	292	393	543
ODA	54	59	54	52	58	69	79	107	104	104

Source: World Bank, Global Economic Prospects 2006; IMF Balance of Payments Statistics Yearbook 2008 and Global Development Finance 2008.

For many countries, alongside international tourism receipts, remittances are the top source of foreign currency. The World Bank indicates that remittances were US\$ 318 billion in 2007, of which the amount sent home by migrants from developing countries was estimated to be US\$ 251 billion in 2007, up from US\$ 226 billion in 2006 and more than double the figure reached in 2002²⁴ (table 3, above). They consistently now amount to more than double official development assistance and roughly 2/3 of FDI flows to developing countries. There is anecdotal evidence that growth in both direct investment and equity from foreign markets is a function of their exposure to immigration. There has been exponential growth in FDI and equity acquisition in the EU10 from the United Kingdom since 2004 and it is widely accepted that this is a result of investors' exposure to migrant Polish culture, as well as growth in earnings by Polish migrants in the United Kingdom. Over the past 20 years, remittances have been less volatile than other sources of foreign exchange earnings in developing countries and have grown steadily. That is why the volume of remittances is being increasingly compared to international tourism receipts. The question arises whether it is more feasible for the country concerned to offer employment and livelihood opportunities in the national tourism sector which needs to be developed or rather help its excess workforce become labour migrants.

Figure 4 Remittances and capital flows to developing countries, 1990-2006 (US\$ billion)

Sources: Global Economic Prospects 2006 (World Bank), IMF Balance of Payments Statistics Yearbook 2008, World Development Indicators 2008 and Global Development Finance 2008.

Remittances can be more stable than tourism receipts, but their flow is also influenced by a combination of factors such as the economic cycles and tightening of regulations on transfers due to money laundering, the enlargement and emergence of economic blocs such as the EU and the proliferation of RTAs, FTAs

24 This amount reflects only officially recorded transfers - the actual amount including unrecorded flows through formal and informal channels is believed to be significantly larger. See World Bank (2008), 'Development Prospects Group, Migration and Remittances Team' in: *Migration and Development Brief 5* for data definitions.

and EPAs, the economic growth of China and structural changes in the geographical regions. In this respect, it can be seen that in recent years the flow of remittances to Latin America and the Caribbean has slowed down, so that they are no longer the largest recipients of remittances, which may be attributed to the weakening of the North American economy and tighter enforcement of immigration laws. In other words, a weaker economy produces fewer remittances than it does with respect to demand of tourism services. Nevertheless, the growth of remittances to developing countries, in particular in central Asia, as well as to emerging economies in Europe, has remained robust because of stronger growth in Asia and Europe as a whole. It has also been found that remittance flows to Sub-Saharan Africa are grossly underestimated, with wide gaps in data reporting in many countries. In 2007, India, Mexico and China were the top 3 recipients of remittances, accounting for nearly 1/3 of remittances received by all the developing countries. The top 10 recipients list also includes several high-income countries, such as France, Spain and the United Kingdom. Remittances flow in there mostly from other high-income countries of Europe.

1.7 Tourism Features and Trends

Tourism and tourists are not defined the same way everywhere, which gives rise to misinterpretations and misunderstandings, therefore this situation is similar to migration and migrants who have been defined in some international instruments mentioned earlier, but respective national and interest group definitions or terminologies differ in this respect and may be held responsible for different formal and practical approaches to the issue. Similar to the approach to consider migrants as a very heterogeneous group is the understanding of tourism being “the activities of persons travelling to and staying in places other than their usual environment for not more than one consecutive year, for leisure, business and other purposes not related to the exercise of an activity from within the place visited”.²⁵ This definition made up from the demand perspective and economic statistics makes sense from the operational point of view as well, since the suppliers of goods and services specifically to people who travel associate themselves with the tourism sector. Following this definition, global statistics are available on international tourism (international tourist arrivals and receipts) as they are on international migration.

UNWTO reports that international tourist arrivals reached 903 million in 2007, marking a 5% rate of growth.²⁶ Asia and the Pacific regions are growing most and are expected to do so at a two-digit growth rate in the next few years. Tourism receipts hit US\$ 856 billion, up by 5.6% from the previous year. International tourism receipts in developing countries grew in 2007 to US\$ 259 billion or 30% of the world total, recording a growth rate of 506% over the period 1990 to 2007. Tourism constitutes the principal export sector in 1/3 of developing countries and, when oil is excluded, the primary source of foreign exchange earnings in most of the 49 LDC. Emerging economies and developing countries recorded an average growth rate of 6-8%, twice the rate of developed countries over the past decade. If these trends can be sustained, it may still be forecast that the number of international tourist arrivals will add another 700 million by 2020, where the most significant increases are expected to take place in China, India²⁷ and other destinations in Southeast Asia. The Gulf States and emerging economies of eastern Europe complete this picture, to be followed by the Latin American and finally African economies. Many of these are also becoming important outbound markets, backed by the growing middle-class on the one hand, and liberalization policies promoting mobility on the other. Chinese visitors already spent about US\$ 30 billion abroad in 2007. It may therefore well be seen that more international tourism occurs in the countries which also produce more migration, both regular and irregular, particularly when it comes to South-North and South-South directions. Tourism (receipts) and Migration (remittances) together contribute as much as 70% to the foreign exchange earnings of the world's poorest countries. Therefore, less migration would affect the volume of international tourism operations, especially in LDC.

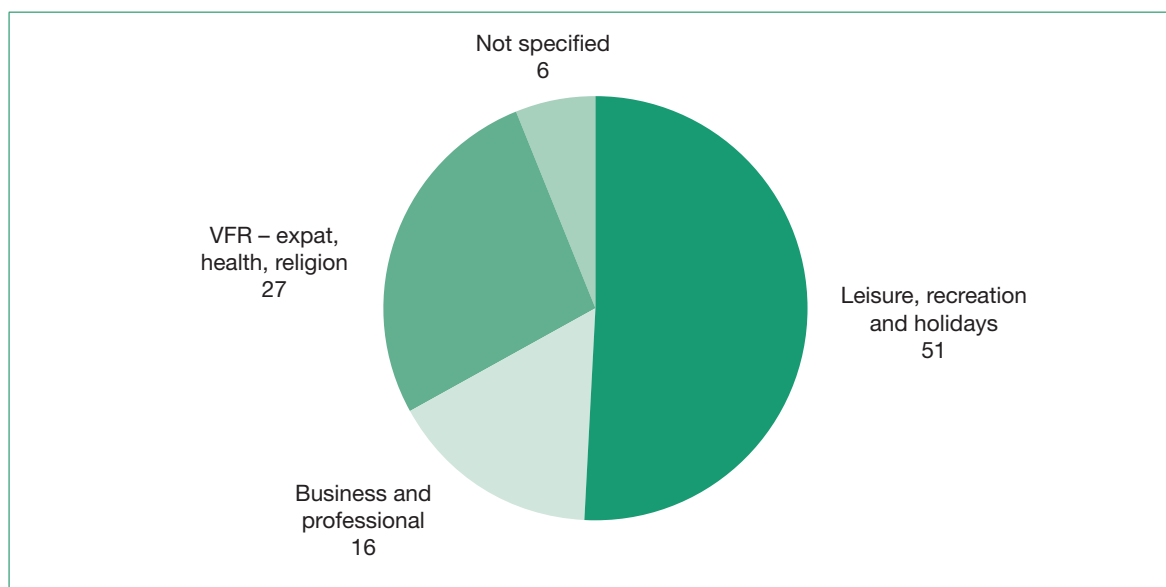
25 Tourism Satellite Account: Recommended Methodological Framework: Commission of the European Communities, OECD, World Tourism Organization, United Nations Statistical Division.

26 World Tourism Organization (2008), *Tourism Highlights*.

27 The domestic travel potential of emerging markets – in 2006 China registered 1.6 billion trips and India 461 million – is a further proof of their long term importance.

Elements of MLT can be found under each main travel motivation, which include major categories of leisure, business and private. The complex categories of VFR, health and religion were calculated by UNWTO to account for 27% of international travel in 2006 (figure 5) and this is where most MLT is contained, not only under the VFR sub-category, but also health and religion.²⁸ On the other hand, even though there is a migration footprint under the other major categories of main travel motivation, attribution to migration as a travel motivation will not always be the case, for example people can go on holiday or business to another country where their family and friends also live permanently, but they do not visit them nor take this into consideration when choosing the trip. The situation is similar to that at national level where people can travel for a number of purposes without attaching their trip choice to the fact that so many family members or friends live in the country concerned, although it would be logical to attribute at least some choice of leisure destination (especially in neighbouring countries) to the proximity of friends and family that have migrated there. Whilst it can be argued that family displacement is a function of migration and is generally linked to social and economic opportunity or disadvantage, it would only be possible to classify VFR as migration-related for perhaps a couple of generations, although this would apply to the majority of cases. Therefore, based on the general figures already available (figure 4), it can be hypothesised that between 15 and 25% of international tourist arrivals and corresponding receipts are linked to migration events. The annex to this study includes a country by country breakdown of statistics on tourism arrivals, which provides an *indication* of the relative importance of VFR flows in each country.²⁹ In line with the above mentioned considerations, it is hypothesised that accurate VFR percentages would correlate with the level of migration and reflect the relative importance of MLT.

Figure 5 International tourist arrivals by main motivation, 2006 (%)



Source: *Inbound tourism by purpose of visit in 2006*, UNWTO 2007.

This probable share of 15 to 25% of international tourist arrivals which are migration driven may not represent a similar percentage of MLT business in terms of tourism receipts. It may possibly be lower since people travelling for the purpose of visiting their families and friends spend less on accommodation and restaurant meals, although they do spend more on gifts and the same on transport services compared with travellers who are not migration-tainted. Also family and friends visits encourage the hosts to spend outside home, particularly on meals, as well as attractions and entertainment.

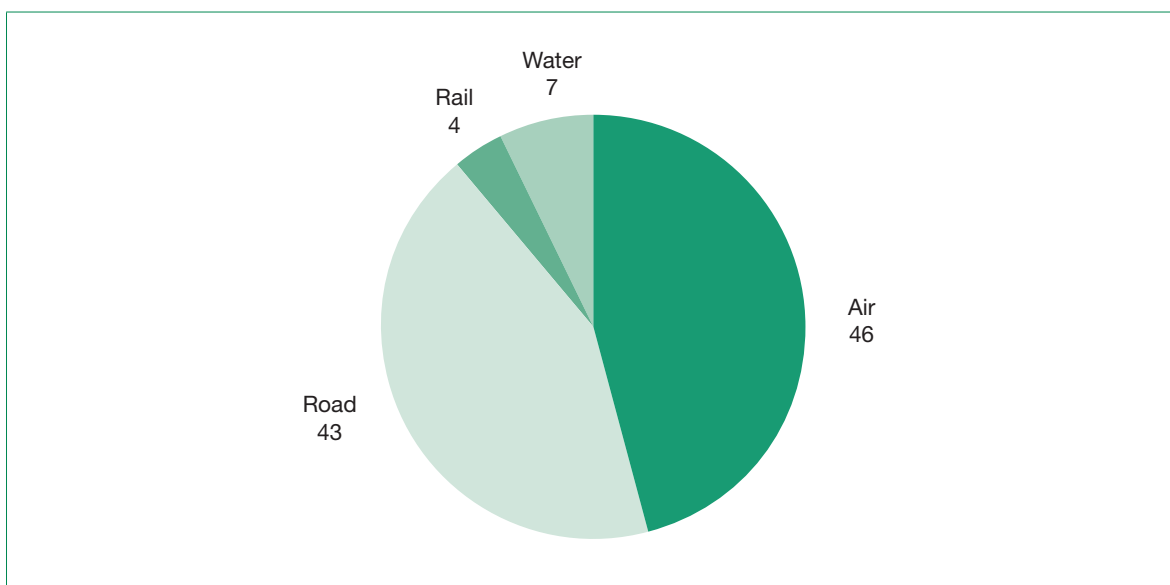
Ever since human migrations began, transport has always been a key factor. Transport by boat contributed to migration across oceans, whilst transport by land by whatever means, ranging from animals to

²⁸ An example can be that of medical treatment in France accessed by Algerians through their family members resident in this country, Lanquar, R. (2007), *Tourisme, migration et co-développement*.

²⁹ These data should however be treated with some caution, as the category used is 'VFR, health, religion, other' and some countries report a statistically significant figure under 'other', making the summary result unreliable.

more sophisticated vehicles, has had a significant role in many important historic journeys. Passenger transport services are part of tourism consumption and supply, where the major part corresponds to air transport (figure 6). Therefore, over the last decade, cost reduction in air transport in both relative and absolute terms, and airports proliferation, have intervened considerably in migration and tourism and have helped enhance their interrelationship. The short era of affordable air transport services nevertheless appears to be coming to an end or to a qualitative change as the classical sources of transport energy become increasingly environment polluting, scarce, and hence more expensive. As a consequence, pleasure trips are likely to suffer most, but affinity trips related to family and professional ties are better positioned to resist or even grow further. Also, should income polarisation continue due to neo-liberal economic policies and persisting recession in considerable parts of the world, there will be more migration pressure considered to be irregular or illegal, even though the traditional destinations of migration are the ones which are mostly hit by the recession.

Figure 6 International tourist arrivals by mode of transport, 2006 (%)



Source: *Access to tourism destinations and passenger transport as part of tourism products*, UNWTO 2007.

1.8 Mobility

Putting all the characteristics of migration together shows that it is a natural human phenomenon, so much as it is natural in the case of tourism which is characteristic of a more developed society as just another area of consumption of goods and services. Migrants' mobility status requires additional comments in this respect. Any act of migration requires an initial financial effort in order to overcome the space barrier and move to a new place, as it also works in tourism. While affordable transport can be considered a propitious factor facilitating migration in this respect, the administrative freedom of movement enabling the exercise of rights, including the right to work, appears as a truly essential condition for a person to migrate to another country.³⁰ The term "administrative freedom" is used here to distinguish it from political or human right freedom. Freedom of movement can also be compared here to freedom to travel, which stayed on the international tourism agenda in the 1960s as one of the characteristics of political confrontation of that time. When obstacles to freedom to travel on the part of some sending states (in particular the ones exercising planned economy) eventually faded away in the 1990s, in most cases restrictions to entry continued on the part of receiving states of both developed and

³⁰ Administrative freedom of movement can also be curtailed at national level. Examples can be found in post World War II Europe, particularly in command economies under the influence of the Soviet Union, where citizens could travel whenever they could afford it economically, but could not readily settle down in big cities, especially the capital, get employment there and access legal residence, even by means of acquiring real estate. This restriction was justified by the shortage of housing and the overriding principle of planned economy.

developing economies, except for a few regional economic integration groupings aimed particularly at free circulation of people within their areas. The general rule is that the poorer the country, the more difficult it is for its people to obtain an administrative permit, basically by means of entry visa, to access other countries whether for establishing a new livelihood there or for tourism consumption. In other words, entry visa restrictions affect both tourism and economic migration. In the latter case, when entry visa – always representing cost – cannot be obtained, a much higher smuggling fee is paid to a human trafficker.

According to UNWTO research on international visa regimes and visa requirements³¹, only 9 states: Andorra, Cook Island, Dominica, Maldives, Micronesia, Seychelles, Western Samoa, Tonga and Tuvalu, permitted visa-free access to their territory to nationals of all countries.³² These are all small territories and predominantly island states that are geographically remote from tourism source markets.³³ They also represent the countries where the role of international tourism income is very important, sometimes even enormous for their economies in terms of wealth (GDP) and job creation. Conversely, some groups of countries have a regional visa-free regime for visitors from a limited number of countries.³⁴

Even in the well developed and diversified economies, where the economic weight of international tourist arrivals may be considered less important in these terms, the impact of entry restrictions focusing at the same time on economic immigrants and tourists is painfully noted. Such may be the case of the United States of America, where, according to the Travel Industry Association (TIA) estimates for 2006, entry visa and related restrictions driven by security concerns affecting also visa-waiver beneficiaries should be blamed for the loss of business worth approximately US\$ 150 billion since 2001 (entry visas are requested from citizens of nearly 170 states). Some studies have estimated lost business due to entry visas and also work permits at world level.³⁵ Lost income is due not only to decreased visitor expenditure, but also to unrealized business opportunities at the destination when business trips are discouraged or aborted altogether.³⁶ In other words, entry administrative permits discourage tourism business including the one that can be additionally boosted thanks to migration. On the other hand, such permits can be considered as legitimate but far from effective measures to manage migration and carry out tourism policies. Managing migration is essential for unlocking tourism movements.

In both areas, more effective tools and measures have been conceived internationally with a view to liberalizing international movements of people and balancing political, economic and social costs and benefits in this respect. The successful attempts belong to the OECD which completed liberalization of movements for tourism purposes among its member countries in the 1980s, and to the European Union throughout the process of economic and political integration including all movements of people, whether for migration, the movement of natural persons and companies to supply services or tourism. The other attempts have either nearly failed or await successful completion once political obstacles are overcome. At a multilateral level, although not global, the World Trade Organization (WTO), under the GATS, has conceived the concept of commitments available to all members on presence of natural persons to supply services in other economies. Thus far, this multilaterally negotiated measure has benefited only executive and specialized posts, as well as inter-company transfers of managerial staff. In other words, entry visas and work permits are issued to such persons under the commitments made, and often continued restrictive clauses. So far, in the current Doha Development Agenda, the attempts of some developing country members to extend this measure, which could take the form of a 'GATS visa', to other categories of temporary service migrants, have failed. On the other hand, the GATS provides for consumption abroad facilitation measures which basically relate to tourism consumers, but, since committed measures are not specific, their implementation can hardly be monitored. The other weakness is that they apply in principle only to administrative formalities on departure, which

31 World Tourism Organization (2007).

32 It can however be argued that some of these rely on neighbouring countries, which the vast majority must transit, to provide immigration control – as in the case of Andorra, which has no airport and its visitors must consequently satisfy the European and national regulations of either France or Spain, which are not visa-free.

33 The economies of these States are found too small to afford the maintenance of embassies and consulates abroad which are traditionally entrusted with processing entry visa applications and issuing visas.

34 Schengen, ASEAN, etc.

35 In 2002, it could amount to US\$ 388 billion according to Chi-Yung (E.) Ng, Whalley, J. (2005), *Visas and work permits: possible global negotiating initiatives*, CESifo Working Paper No. 1614.

36 World Tourism Organization (2008), *International Travel Facilitation Project for Africa*, Secretariat document.

could be compared to 'exit visas' corresponding to tourism generating states, but do not deal with entry visas.³⁷ The latter could possibly be dealt with under another WTO principle of trade facilitation, but this possibility has not yet been explored by UNWTO.

With respect to tourism, until 1989, the UNWTO had been preparing an International Convention to facilitate tourist travel, visits and stays (also called 'Budapest Convention'). It aimed to cover all border formalities on departure and entry, including entry visas, but the negotiations on this project were interrupted at the end of 1989 and never resumed. Currently, the proposal of a draft declaration on the facilitation of tourist travel is being discussed among UNWTO Members.³⁸ Also the Convention of International Civil Aviation (Chicago Convention), managed by the International Civil Aviation Organization (ICAO) deals with entry formalities, although the purpose is not so much phasing out such formalities, but rather ensuring orderly expediting entry and departure at airports. The International Maritime Organization (IMO) has undertaken a similar approach with respect to maritime transport of passengers. There have also been idealistic proposals to establish a Development-Visa Scheme.³⁹

Concepts and projects aiming to ease border formalities and deal with entry visas have also developed at various regional or multilateral levels, in the Americas (Andean Community, Caribbean Community, MERCOSUR), in Africa (ECCAS, ECOWAS, EAC, SADC), Asia (ASEAN) and within APEC. Also the Regional Economic Commissions of the United Nations are involved in some aspects of border crossing facilitation. All in all, they express a universal desire to ease movements of people. However, they have been successful only in a limited scope and scale, and therefore eventually stopped to be fully implemented. As a summary result, they have not helped to achieve a major breakthrough to overcome the principal divide between the opposing groups of countries exporting and importing migrants and tourists. The actual effect is that the countries concerned and their respective governments do not oppose each other, but rather continue to oppose people by deterring them from travelling internationally⁴⁰, which is also, by and large, against the interest of the commercial sector.

1.9 The 'Gender Factor'

Some migrants may move to another country as couples or families, but this modality is either hardly available to regular and irregular labour migrants or it is simply not favoured by them for economic reasons. Gender profiles of labour migrants associated with specific jobs and professions – repeat predominant national profiles. It is natural that most migrants of either sex are employed in the services sector since it is where, in the service economies of developed countries, a great majority of people are employed anyway. If a developed economy has an important tourism sector it will certainly take a great number of migrant women as room maids, waitresses, cooks and entertainers, whilst a smaller number of migrant men will be able to work as waiters, cooks, chauffeurs, gardeners and caretakers. A large contingent of migrant men will also be employed in the construction sector putting up tourism facilities, such as hotels, second homes and apartments for resident migrants, recreational facilities of all kinds, and the maintenance of all of them. In other words, from one day to another, the tourism sector of developed economies would not be able to perform and develop without migrant workforce of both men and women.

The type and direction of family visits varies in relation to migrant gender and migrant status, whether regular or irregular. The latter one hardly makes such visits or trips possible in either direction,

37 Working Group on Liberalization: Understanding on consumption abroad under GATS with respect to tourism. Rev.3.1. (UNWTO, June 2003).

38 The current draft UNWTO Declaration on the facilitation of tourist travel reaffirms the sovereign right of states to control the access of foreign nationals to their territories, notably by means of visa policies, which they have the authority to determine freely, unilaterally, or in cooperation with other states; yet it considers that, without detriment to this discretionary authority, tourist travel could be greatly facilitated by adopting measures that simplify visa application and processing formalities and by improving timeliness of issuance.

39 E.g. Global Commission on International Migration (2005), 'The Development-Visa Scheme: A Proposal for a Market-based Migration Control Policy', *Global Migration Perspectives*, Paper No. 36.

40 Global Commission on International Migration (2005), 'Unequal Access to Foreign Spaces: How States Use Visa Restrictions to Regulate Mobility in a Globalised World', *Global Migration Perspectives*, Paper No.43.

irrespective of migrant gender. A higher proportion of female migrants go back home to visit their families, whilst male migrants tend instead to be visited by family members from their home countries. Travel intermediaries are aware of these conditions.

According to Morrison and Özden⁴¹, migration generally produces greater benefits in the origin country for the girl children of migrants than for boys in terms of health and education benefits, whilst typically there are better prospects for female return migrants than for males. Migrant women sending remittances tend to ensure greater allocation of resources to children, whilst returning women migrants generally have acquired proportionally greater skills than their male counterparts and consequently have a comparative advantage.

1.10 Tourism Marketing

As any form of tourism, the one related to migration cannot succeed without marketing, although it may appear as an area which may not have been truly exploited by the tourism sector, except for the two major categories of resident and former migrants discussed earlier. Though, the situation is complex as it adapts to the specifics of each category.

- (a) Resident migrants, before acquiring a second home, are targeted under a leisure motivation not as tourists but as buyers of real estate, time share or another form of ownership. Subsequently, resident migrants are dealt with by the local tourism sector as all other residents. Real estate and related laws allowing foreigners to buy and manage property and prevent abuse are fundamental in this respect.
- (b) Since, in the modern era, Europe was the main region of emigration and created former migrant ethnic communities of varying degrees of identification with their countries of origin, such ethnic groups have traditionally been targeted from Europe as potential customers of its tourism sector. Notable examples are Irish or Polish origin groups in the United States of America. Promotional campaigns are carried out by respective National Tourist Organizations (NTOs). Presently the situation is very diverse. Jewish communities in the United States of America are targeted from Israel, the Israelis from Poland and Spain, the Spanish from Latin America under the call of common roots, Afro-Americans from Africa, the Japanese Hawaiians from Japan. This is only the beginning. Since the world continues to interconnect or globalize and thus to produce more migrations, international tourism promises to sit increasingly on the ethnic track and the migrants' origin will offer continuing and enriching marketing opportunities.
- (c) When it comes to travel of regular migrants and their families, tourism services and transport in particular are primarily marketed from within the migrant community, notably by migrant associations which eventually are transformed into professional travel shops. It is also the case when they start providing specialized tourism services to the public at large. In other words, their initial focus on migrants' needs in the field of tourist travel helps grow and specialise the travel agency sector the result of which is that the public is better served. A special field in this area is occupied by student travel agencies, traditional facilitators not only of discounts and summer holidays for their principal customers, but also seasonal work and training abroad. Student agencies usually benefit from public support offered to students, which is not the case of mainstream migrants' travel agencies.
- (d) Irregular migrants consume some tourism services, but such services can hardly be marketable to them in a typical manner from within the tourism sector, and impossible by NTOs. Clandestine marketing takes place from within the migrants' smuggling networks, and there is social marketing for public and private services offered to irregular migrants exercised by charities and public institutions. In most countries tourism facilities, primarily accommodation, are often rented by state institutions and charities, where irregular immigrants may receive medical care and temporary shelter.

41 Morrison, A. R., et al, 2007 ; Özden, Ç., et al, 2007.

1.11 Managing Migration-led Tourism (MLT)

Even though the tourism sector and tourism authorities deal with migrant issues in many ways, their active involvement in managing these issues is not frequent. Management means exercising control in the desired direction and for the expected results, which in this case should be considered from both a social and economic perspective. Management in the case of MLT calls for specific government competence. With respect to both migration and tourism in most countries, it is shared between central and local governments. Since contemporary tourism, in its commercial, social and administrative dimensions, represents a set of industries, sensitivities and regulations, responsibility for its various aspects is dispersed at state level. Its central government bodies entrusted specifically with tourism, i.e. National Tourism Administrations (NTAs) have therefore limited competence in this respect: by means of regulations and other tools of intervention they can control only some industries (usually they do not control transport), they control funds used for tourism promotion and specifically marketing, and they can be successful in carrying out tourism policies if they manage to organize effective coordination mechanisms involving other responsible bodies at central and local levels. NTAs certainly are not responsible for government policies and measures concerning migration. However, they may intervene in some tourism facilities and services used by migrants, as well as other categories of users.

The latter shows more subsidiary than indirect NTA role in managing migration at state level. Whenever tourism issues around migration arise, the NTA can help in an indirect way, through care for good quality of tourism services, coordination mechanisms, research funding and consultation. The NTA can advise the other government departments on migration policies, and in so doing, take positions regarding a whole range of issues, such as mobility (visa), recognition and enhancement of immigrants' qualifications to work in the tourism industry, assistance in establishing tourism companies by immigrants, doing away with the requirements of 'economic needs tests'⁴². While pursuing these objectives, any NTA action with respect to immigrants, as any other valuable stakeholder in tourism development, would naturally need to be consulted with the national private sector (and its trade unions), since it is the latter that takes so many immigrants on board as employees, that relates to the tourism product generated by the migrants themselves, and, that eventually may compete with them in supplying various types of tourism products or services. It may well be that helping migrants in mobility and establishment will accrue economic, and hence social benefits not only to them, but to development in general.

42 Such tests are used by some countries as a deterrent to commercial presence under the GATS.

Case Studies

This chapter defines a methodology for analysing tourism and migration to and from individual countries and markets, which has been applied to produce a series of case studies that illustrate and explore issues surrounding the interface between tourism and migration. The chapter also identifies key stakeholders and decisive actors at national and international levels in tourism and migration.

Countries have been selected to provide a representative sample of origin and destination countries and areas, which is likely to indicate the most important themes and linkages in the relationship between migration and tourism. Some of the summary case studies¹ presented in the present chapter are more comprehensive than others, but together they illustrate common themes and indicate issues of data inconsistency.

The framework for case studies consisted of a collection of a series of data for each country (subject to restrictions and inconsistencies), which were analysed within a common framework in an effort to test a series of hypotheses.

The Key Data Sources used were as follows:

- UNWTO statistics
- IMF
- BOP statistics
- World Bank Atlas
- National offices of tourism
- National Census
- OECD Development Statistics Portal

Building on Part 1, as much of the following data sets as possible were captured for the period from 2000 to date. These included population, GDP, unemployment, labour force and figures for both inbound and outbound tourism. Statistics and profiles of human migration, affinity tourism (with an emphasis on VFR), 'expat' tourism, tourism skills and employment, remittances and FDI were also examined.

Where possible, data were disaggregated by sex, but (as predicted) there were significant gaps in this area; given the well-documented variation in benefits of migration for different sexes, this led to a number of policy recommendations on data collection.

The following analysis illustrates some of the considerations in key regions and introduces those areas in which policy recommendations are indicated.

¹ These 'summary case studies' are based on the researchers' more comprehensive case studies that will be published elsewhere.

2.1 Asia

The Asian region plays a crucial role in the discussion of global migration. History reveals that international migration is not a new phenomenon in Asia, host to about 60% of global population. However, recent developments show that an increasing number of Asian countries have become major suppliers of both skilled and unskilled workers in more developed economies within and outside of Asia that faces shortages in unskilled and skilled labour.

The migration issues affecting Asia as a region are quite varied given the demographic, economic, cultural and political diversity of the region. Permanent migration from Asia is evidenced by the presence of Chinese, Vietnamese, Korean, Japanese, Indian and Filipino communities overseas. As permanent residents abroad, they have been tapped by their origin countries to contribute to development through tourism and investments. It cannot be denied that some of these communities host undocumented migrants but data are difficult to gather and monitor.

Temporary migration, on the other hand, has become more prevalent in recent years. Unskilled workers (domestic helpers, construction workers) are being deployed to the Middle East, Singapore and finally Hong Kong and Taiwan, China. In order of relative importance, these workers are sourced from the Philippines, Indonesia, China and Vietnam. Recently, debates on 'brain drain' have centred on the exodus of skilled workers from countries that used to export only unskilled workers. This situation is particularly highlighted in the Philippines and India, major sources of health and IT professionals, by OECD and more developed Asian economies like Singapore.

In an attempt to explore the links between migration and tourism, Asian countries can be classified according to whether they are more of origin or destination market of labour migrants or expatriate tourism.

There are 5 groups that can be differentiated:²

- Group 1 Small countries like Singapore and Brunei – destination markets.
- Group 2 Larger and more developed economies – Japan, Republic of Korea, Taiwan, China – destination markets.
- Group 3 Larger countries – Vietnam, Indonesia, Philippines, India, Thailand and China (origin markets for producing largely unskilled labour).
- Group 4 Larger countries – Philippines and India (origin markets for generating skilled labour migrants – IT, health).
- Group 5 Countries with significant immigration, especially for special segments like foreign retirees – Malaysia and Thailand (and Philippines as newcomer).

The case studies for this region focus on four countries: China, India, Japan and the Philippines.

Migration and Tourism Trends

- (a) The extent of external migration from Asian countries varies in terms of share to total national population. In the Philippines, there are about 8.7 million Overseas Filipinos (permanent residents, temporary workers and undocumented), accounting for 10% of total population of 88 million. The country has become the 3rd largest migrant-sending country in the world after Mexico and India. China's immigrants account for about 30 to 40 million or 3% of the resident national population. India has about 20 million (1.9%), while Japan has less than 1 million or 0.7% of population (Hugo 2007).

2 Based on classification used by Graeme Hugo in his paper on International Migration and Development In Asia presented during the 8th International Conference of the Asia Pacific Migration Research Network on the theme of 'Migration, Development and Poverty Reduction', Fuzhou, China 25-29 May 2007.

- (b) Migration is driven by the growing demand from OECD and other Asian economies for skilled and unskilled workers. These importing economies face labour shortages due to ageing populations and mismatch between their local labour supply and labour requirements. There is a growing and expanding labour migration industry, as evidenced by the proliferation of recruitment agencies, travel agencies and government agencies that facilitate recruitment and migration, which naturally involves growth in travel infrastructure and in due course also the development of return tourism.
- (c) Recently, both India and the Philippines have been confronted by the exodus of skilled migrants, especially IT and health workers. At the same time, they continue to deploy unskilled workers. The agenda is economic: to alleviate the unemployment problems in the origin country and generate remittances to support consumption and (hopefully investment) spending in origin countries.

On the positive side, migration has contributed to the generation of remittances that finance the balance of payments deficit and economic growth of Asian labour exporting countries such as the Philippines and Vietnam. Migration of skilled workers has also resulted in the emergence of high value VFR tourism. Migration has alleviated the unemployment situation in these Asian economies, but on the negative side the migration of skilled workers is increasingly becoming permanent with whole families, including future entrepreneurs leaving forever. This is a result of the growing attraction of importing economies, which offer families opportunities to accompany the migrants, better social security and medical systems, better living standards and social institutions.

- (d) Governments are becoming more involved in addressing the migration issue by forging agreements with importing countries, agreements that provide 'equity' provisions to support the development of the exporting or origin country.

Governments are encouraging their labour migrants to return to their country of origin through temporary visits (expatriate tourism), investments in assets – business enterprises, real estate properties, etc., or transfer of technological know-how learned during their overseas employment. In the case of India, migrants from the United States of America and United Kingdom have contributed to the development of the IT and medical tourism industries. In the Philippines, there is a special programme to encourage the overseas Filipinos to visit and to eventually retire in the Philippines. Real estate projects are specifically aimed at this network of 8.7 million Overseas Filipinos, almost 4 million of whom are temporary labour migrants. Other Asian countries like Malaysia, Republic of Korea, Taiwan, China and mainland China have offered incentives (tax exemptions on income remitted, granting of permanent resident status to spouses and children and subsidised housing). The main thrust was to bring home the scientific minds that have acquired knowledge in developed economies, but there is a lack of successful examples.

- (e) One illustration of how migration policy has become a fiscal tool is the case of Japan's migrants, who are becoming part of the so-called pool of 'migrant retirees' in countries like Thailand, Malaysia and the Philippines. They can apply for special long stay and retirement visas in these countries. The visas can also cover their families. The impacts on the destination countries include: community development, job generation, management of migration, consumption and investment spending. Today, Japan continues to encourage its nationals to seek temporary or permanent homes abroad to alleviate its fiscal situation due to the demands of its ageing population. There are close to 1 million Japanese long stayers abroad with significant growth in associated VFR tourism.

As destination markets, countries like Japan, Taiwan, China, the Republic of Korea and Singapore benefit from the short-term labour migrants who support their needs for competitive and skilled workers in industries such as IT, health care, and manufacturing assembly (electronics) and for low-skilled positions (e.g. domestic help) to support the needs of their productive workers.

- (f) Women labour migrants from Indonesia, Thailand and the Philippines have traditionally been deployed as domestic helpers and service workers. However, recent data reveal more women being employed in skilled positions such as IT and healthcare services. The phenomenon of women migrants getting married to locals in their place of work has expanded the VFR tourism markets for countries like the Philippines. Japanese nationals, for example, that have married Filipinas, visit the Philippines to spend time with their wife's family and friends, especially during the holiday season.

According to the Asian Labour Migration Network, more than 6 million migrants are working in east and Southeast Asia and 1/3 are in an irregular situation. Irregular migration often takes the form of trafficking, with migrants, particularly women, kept in bondage or forced into prostitution, which in turn does help to maintain sex tourism in this region.

Remittances

Migrants contribute to the economic growth of their origin countries via remittances. This is true in the case of the Philippines, India, Sri Lanka and Bangladesh. Remittances are sent back to the origin countries through formal channels (more regular basis) and (occasionally) through informal channels i.e. via returning friends and relatives and through VFR tourism. However, experience by countries like the Philippines revealed that these remittances have not been properly channelled through productive and revenue-generating activities in the past. Remittances have primarily financed excessive consumption by the migrants' beneficiary families. The consumption-led growth of the Philippines has conveniently postponed the much-needed structural reforms to increase long-term investment in plant and infrastructure to make exports more competitive. There are more conscious efforts on the part of the government (and international agencies such as the Asian Development Bank) to create facilities to develop more migrant entrepreneurs and to educate their families on how best to generate productive returns from remittances. For some countries like China and Indonesia, remittances have made little contribution, when compared to the size of their total export revenues.

2.1.1 China

Population (2006, million)	1,312	Surface area (2006, 1,000 km ²)	9,598
Population growth (1997-2006, average annual, %)	0.7	GNI (2006, US\$ billion)	2,695
Population density (2006, people per km ²)	141	GNI per capita, Atlas Method (2006, US\$)	2,010
Labour force (2006, million)	783	GDP growth (2002-2006, average annual, %)	10.0
Urban population (2006, % of population)	41.3	Poverty headcount ratio at national poverty line (2004, % of population)	10.3
Age dependency ratio	0.40		

With the largest population in the world, estimated at some 1.31 billion people (WB 2006), a history of large migration outflows and increasingly open borders, an analysis of migration and tourism in China was certain to reveal a variety of interesting phenomena, interrelationships and issues for future policy considerations. China illustrates the important role that culture and tradition can play in encouraging MLT flows. Though little data exist on these flows in China, anecdotal evidence and available studies on culture, tourism and migration provide compelling evidence that the growing Chinese diaspora is, and will continue to be, a major generator of bi-directional tourism, primarily for VFR purposes, but also for business and holiday reasons.

Since the economic reforms of the late 1970s, 18 million Chinese have emigrated, constituting about half of the 35 million strong worldwide Chinese diaspora (Yale Centre for the Study of Globalisation – YCSG, 2007). Typically, when not moving to neighbouring countries, both skilled and unskilled Chinese emigrants have shown a preference for North America, Australasia and western Europe. However, more recently they have emigrated in larger numbers to destinations such as Argentina, South Africa, Mauritius, Israel and Dubai, countries which previously were not associated with Chinese migration. For example, Chinese immigrants filled labour supply gaps created by the outflow of 2 million Romanians following the fall of communism in Romania (YCSG 2007).

The rise in Chinese emigration can be attributed to China's economic expansion and the surge in rural-urban migration which has led to congestion issues, lack of employment opportunities and downward pressure on wages in the cities. Even with a double-digit economic growth, China is failing to produce enough jobs to absorb the rural migrants. Consequently, many have looked abroad for better opportunities. It should be noted that overall, the emigration rate from China is low, with the emigrant stock at only 0.6% of the population (WB, 2008). However, given China's massive population, the number of emigrants in absolute terms is high. China's current policy is to maintain the numbers emigrating from the country (UNWTO) as emigration helps relieve unemployment pressure and provides annual remittances amounting to US\$ 20 billion (YCSG 2007).

Following Mao Zedong's ban on tourism from 1946 to 1976, China opened up its so-called 'bamboo curtain' in 1978 as part of an effort to modernise its tourism and business sectors. In 1979, only 5.7 million foreign visitors, nearly all from Hong Kong, Macao and Taiwan, made their way to China. By 2007, this number had risen dramatically to 124.9 million foreign visitors (China National Tourism Association 2008), with 82% from Hong Kong, Macao and Taiwan, China. China receives most of its international tourists from Asia (in particular from Japan and the Republic of Korea), followed by Europe and North America. China's travel and tourism industry generated US\$ 305.1 billion in 2005 and according to the World Travel and Tourism Council's April 2006 report it is expected to grow to US\$ 1.3 trillion in 2016, representing an annual growth of about 8.7% from 2007-2016 and making it the second fastest growing tourism industry in the world. The same report expected foreign visitors to spend US\$ 75.1 billion in 2006, equivalent to 2.9% of China's GDP directly (or 13.7% when indirect spending effects are included). Tourism was expected to provide 17.4 million jobs in 2006, or 2.3% of total employment, and would support as much as 20.4 million (2.5% of employment) by 2016.

Domestic tourism has grown enormously primarily due to rising income levels and urbanisation. The rise in international tourism, on the other hand, has been encouraged by the WTO accession, economic growth and the exposure created by the 2008 Olympics.

Chinese diaspora

The social capital theory contends that "migrant networks, namely interpersonal ties connecting migrants, former migrants, and non-migrants in origin and destination areas, serve as social capital that lowers the costs and risks of international migration and increases the prospects and rewards of foreign labour" (Pan, 1999: 31).

Accordingly, you can see patterns in the origin of Chinese emigrants in different destinations around the world. Aside from in countries neighbouring China, the main Chinese settler societies have sprung up in North America and Australasia, as well as some significant societies in Europe. Take for example Fondo, a district of Santa Coloma de Gramenet on the outskirts of Barcelona. Nine Chinese citizens lived there in 1990 but the population has grown now to 4,000 Chinese inhabitants, becoming the largest hub for Chinese immigrants and tourists in Spain – indeed a growing reference point for Chinese travel and trade in Europe (Herrero and Halarcon, 2005).

Moreover, social capital has led to region-specific Chinese diaspora, i.e. the members of a particular emigrant community will all come from the same area in China. For example, following World War I, many labourers from Zhejiang stayed on in Europe, establishing themselves and inducing an escalation in migration from the provincial capital of Wenzhou which in turn led to the formation of sizable Chinese communities in Paris, as well as other European cities like Berlin, Milan, Hamburg, Rotterdam, Amsterdam and Marseilles. As such, Chinese diaspora can have very different cultures and behaviours, a factor which should be taken into consideration by, say, airlines wishing to promote flight deals to and from certain parts of China.

Chinese emigrant communities have been known to congregate in large numbers, creating distinct settlements often called 'Chinatowns'. Such areas are often popular tourist attractions in their own right and can serve to create an awareness of and greater interest in China itself. No studies could be found on the effects of such exposure on foreign populations' desire to travel to China. However, the many aspects of Chinese culture which have been brought over with emigrants have no doubt served to pique the interest of curious foreigners and encourage exploratory travel in China.

Astronauts, Parachutists and Students

The return of emigrants to their countries of origin is a common feature of many migration flows, obfuscating the differences between settlers and sojourners. Recent migration of wealthy Chinese to the United States of America and Australasia has evolved further with patterns dubbed the 'astronaut' syndrome and the 'parachute kid' syndrome (Skeldon, 1996). Typically, in the former, a Chinese male will leave his family in the destination country as he returns to China to continue his business. The second case is characterised by parents returning to China once their kids have established themselves in the destination country. The result is families with two or more residences, with regular commuting between the homes in the two countries (Skeldon, 1996). Such movement is usually for VFR purposes and can consequently be considered to fall under tourism.

The movement of Chinese students and its potential impact on tourism (and migration) is worthy of consideration too, given its massive increase following China's open door policy to promote international exchange. For example, in 1978 only 28 Chinese students were recorded studying at universities in the United States of America, but by 1993-1994 this number had risen to 44,360, with Taiwanese and Hong Kong students adding a further 51,000 (Skeldon, 1996).

Skeldon (1996) found that only about 1/3 of the students who had travelled abroad since 1979 returned to China, with the proportion returning from the United States of America even lower at about 1/5. As such, these student migrations are not only likely to catalyse an increase in bi-directional VFR tourism; they are also likely to add to diaspora communities thereby increasing social capital and inducing more migration. Moreover, the origin of Chinese students has varied more than that of migrants (Skeldon 1996) and as such their movement can shift patterns of social capital, thereby inducing VFR tourism and migration from regions which traditionally have not been great sources of migration.

China's outbound tourism industry grew 18.6% between 2005 and 2006, from 34.52 million visitors to almost 41 million. This is in stark contrast to the pre-2000 volumes which did not reach 10 million and represents a doubling of the volume of 2003 outbound tourism (approximately 20 million). China's outbound tourism market is widely acknowledged to have huge potential and the UNWTO expects it to be the fourth-largest source of outbound tourists by 2015, with over 100 million Chinese travelling overseas annually. Prior to 1997, overseas travel was only permitted for business, study or family visit purposes and was strictly controlled. However, in 1997 the Chinese Government officially allowed foreign tourist travels for personal pleasure, introducing the Approved Destination Status (ADS) Scheme, a bilateral tourism arrangement between the Chinese Government and a foreign destination allowing the countries with ADS status to host Chinese tourist groups travelling for leisure purposes. Countries with ADS status have expanded from 20 in 2002 to 134 at the time of writing, with the United States of America as a recent addition.

The fact that the family is at the heart of Chinese culture ensures the mass expansion of VFR tourism, more precisely MLT, as a function of migration, whilst the development of strong Chinese communities in destinations supports TLM as the resourcing of 'Chinatowns' provides a reliable framework for migration.

Findings

1. Chinese culture is an important factor in migration and tourism flows.
2. Chinese historic policies have discouraged tourism and promoted illegal migration, but consequently also encouraged the development of a strong enterprise culture.
3. Economic development appears to correspond to tourism growth, but there is a lack of data to demonstrate this relationship in China.

4. The VFR sector in China is a key market for tourism entrepreneurs, but requires good cultural understanding.
5. As 'Chinatowns', Chinese emigrant communities are often popular tourist attractions and can serve to create an awareness of and greater interest in China as a destination.
6. Chinese overseas students are an important group, which is contributing to growth in VFR tourism and reverse migration.
7. It can be argued that remittances from emigrants have been used to fund and thereby increase outbound VFR tourism.

Finally, there are significant gaps in available data in China and therefore, this area requires attention.

2.1.2 India

Population (2006, million)	1,110	Surface area (2006, 1,000 km ²)	3,287
Population growth (1997-2006, average annual, %)	1.6	GNI (2006, US\$ billion)	901
Population density (2006, people per km ²)	373	GNI per capita, Atlas Method (2006, US\$)	820
Labour force (2006, million)	443	GDP growth (2002-2006, average annual, %)	7.8
Urban population (2006, % of population)	29.0	Poverty headcount ratio at national poverty line (2004, % of population)	34.3
Age dependency ratio	0.59		

After China, India has the second largest diaspora in the world, sending large numbers of skilled migrants to industrialised countries and lower- and medium-skilled migrants to the Middle East. With a rapidly growing tourism industry, particularly outbound tourism, this paper attempts to determine the links between emigrant communities and tourism flows, attention paid to the possible effects that different diaspora characteristics may have on VFR. Given the skills and global networks that can be acquired through emigration, the case of India also allows for an analysis of the potential benefits that different types of emigration can have on domestic tourism development.

Indian migration of the modern era dates back to the 18th Century when Indian labour was used on colonial rulers' plantations in the Caribbean and Africa to fill the labour shortages created by the abolishment of slavery. Until the 20th Century, Indian migration was dominated by males. It was only when women started migrating too that the movements assumed a more permanent character. Since India's independence, two distinct streams of migration have left India: people with professional expertise or technical qualifications emigrating to industrialised countries such as the United States of America, United Kingdom, Canada and Australia, and semi-skilled and skilled workers migrating to the Middle East. The first stream has been more or less permanent with 1.5 million Indians emigrating to the four above-mentioned countries between 1950 and 2000, whereas emigration to the Middle East has typically been for fixed-term contracts; in 2005, it was estimated that over 3 million migrants lived in the Gulf countries, most coming from Kerala, Tamil Nadu, Andhra Pradesh and Punjab. In 2004, nearly 500,000 Indians were given emigration clearance for contractual employment, with about 90% moving to the Gulf States (IOM, 2008). According to the World Bank (2008), the top 10 destination countries for emigration are the United Arab Emirates, Saudi Arabia, United States of America, Bangladesh, Nepal, United Kingdom, Sri Lanka, Canada, Kuwait and Oman. In addition, there has been a massive migration of Indian students seeking to pursue higher education abroad (80,466 enrolled in academic institutions of the United States of America in 2004-2005), many of whom stay on to find employment

after obtaining their degrees. The IOM (2005) listed India as the world's second largest migrants sending country after China, with an estimated diaspora of 20 million. The Government of India has had a policy of encouraging migration, mainly because of India's high population growth and unemployment. Furthermore, the contribution of remittances to the foreign exchange reserve is significant and has helped to reduce the current account deficit; in 2007 India was the world's largest recipient of migrant remittances, receiving US\$ 27 billion. Nevertheless, the government has expressed concern over the welfare of its emigrants and has therefore adopted a policy to regulate emigration whereby the process of deployment is regulated by recruiting agents who are registered with the Ministry of Labour.

In 2004, India had the 5th largest GDP in the world, leading to dynamism, optimism and an increase in disposable income for large segment of population and the emergence of the 'Great Indian Middle Class' (UNWTO). There are 50,000 households with an income exceeding US\$ 200,000, a number which is expected to grow to 141,000 households by 2010. Between 2003 and 2004, the number of people earning more than US\$ 1 million a year grew by 14%, which was faster than in the United States of America and United Kingdom. There are 28 million passport holders who are potential travellers and the capacity to travel has spread to smaller towns and even rural areas. Given the remarkable growth of the Indian economy, it is not surprising that outbound tourism grew rapidly between 2002 and 2006, with the 15-20% annual growth outpacing the growth of inbound tourism. In absolute numbers, outbound tourism is nearly twice the size of inbound tourism.

The effects of wealth and skills of emigrants on the volume of VFR travel

According to the World Bank (2008), the top 10 emigration destinations for Indians are the United Arab Emirates, Saudi Arabia, United States of America, Bangladesh, Nepal, United Kingdom, Sri Lanka, Canada, Kuwait and Oman. Looking at outbound tourism to India's emigration hotspots, it seems surprising that outbound tourism to Asian and Gulf countries with huge Indian immigrant communities, such as Malaysia and United Arab Emirates, is not significantly higher than outbound tourism to the much more remote United States of America and United Kingdom. Certainly most of the Asian and Gulf countries cater well to the demands of the typical Indian tourist, offering shopping opportunities, connectivity, proximity and in many cases lower prices than their western counterparts. Moreover, the large Indian diaspora creates culturally familiarity, an important attractor.

However, it is possible that the low-to medium-skill nature of jobs in the Asian and Gulf countries negatively affects VFR travel. Low-to medium-skilled migrants often come from traditionally poorer areas and as such their families and relatives are less likely to have the means to travel to see them. Some of these areas such as Kerala have benefited substantially from remittances – remittances made up 21% of state income in Kerala in the 1990s – but there is little to no evidence suggesting that remittances are used on outbound travel. Instead, much of the travel to these areas may well be taken by more affluent households for leisure and business purposes. Conversely, emigration to the United Kingdom and United States of America has been primarily high-skilled in nature, with emigrants coming from relatively affluent households and taking high ranking jobs in academia, information technology and medicine. As such, both remittances to, and incomes of, the India-based households are likely to be higher, thereby permitting outbound travel for VFR purposes.

Furthermore, Kuznetsov and Sabel (2006) describe a situation common to India (and as exemplified by the growth of the Indian IT industry) whereby high-skill and low-skill labour follow a global circulation from a relatively poor home economy to a rich one and then back again. This pattern of migration, particularly involving high-skill migrants, creates diaspora networks which open up various opportunities for economic development, including tourism development, and provide a welcome remedy to the 'brain drain' issues associated with one-directional migration.

The tourism industry could benefit from such diaspora networks, for example from Indian students who move abroad to continue their studies in tourism and related studies and work in developed countries and then use their global networks, especially those of their diaspora, to support new tourism developments and investments in their home country. Consequently, a study of the global

supply, knowledge and credit chains of Indian tourism start-ups could reveal some interesting findings regarding the effects of diaspora networks on the Indian tourism industry.

The medical tourism industry has already benefited from the return of highly skilled migrants and diaspora networks, a success which is now beginning to feed itself. Boasting world class healthcare professionals, nursing care and treatment cost approximately 1/6 of that in the developed countries, India is experiencing an annual growth of 30% in its medical tourism sector. According to a CII-McKinsey study, medical tourism can provide up to Rs* 5,000-10,000 of additional revenue for up-market tertiary hospitals by 2012. The emergence of the sector has caught the attention of both Indian and foreign insurance companies who are looking at India as potential major healthcare destination with internationally competitive corporate hospitals. Indian hospitals have begun to cooperate with facilitating agencies like tour-operators and have started marketing and advertising treatment packages to foreign patients in an attempt to boost the health tourism sector.

* Indian rupees

Aside from a strong economy, the growth in the Indian outbound market can be attributed to a number of factors:

- liberalization of national civil aviation policies have created easier access to more countries;
- liberalization of policies governing the issue of travel documents e.g. passports;
- improved bilateral visa arrangements with numerous countries;
- relaxation of foreign exchange regulations;
- greater awareness of other destinations due to improved marketing campaigns.

A comparison of outbound and inbound tourism volumes of the top 23 outbound destinations shows that where inbound numbers (Indians from diaspora travelling back to India) exceed outbound tourism (Indians travelling abroad), the countries are either mature, affluent markets Europe, North America, Australia and Japan, or poor immediate neighbours (Pakistan, Bangladesh and Sri Lanka).

The typical profile of the Indian outbound tourist has undergone changes in recent years. Although outbound tourists are by and large still mainly family oriented, seeking family activities and recreation and preferring to travel in groups, Free Independent Travellers (FITs) are growing quickly in number. FITs consist primarily of MICE and business groups, between 23-45 years of age and largely male. Indian outbound tourists have a preference for multi-destination travel (70%) and shopping as main purpose is very popular (30%) (UNWTO, 2006). Their average expenditure is relatively high, but they are also very price-sensitive – the cost of travel is major factor in choice. Consequently, the Asia-Pacific region is the most popular destination, followed by Middle East. In 2004, the Asia-Pacific region recorded 29% growth with 5 countries (China; Hong Kong, China; Malaysia; Thailand; Sri Lanka) receiving over 70% of outbound tourism from India. The business travel segment (30%) is expected to be the biggest growth sector because of India's growing trade and investment relations with the world. The VFR section is also a major part of the Indian outbound travel though it has typically been limited by difficulties in obtaining visas.

With two distinct emigration flows, one of high-skilled workers to industrialised western countries and another of low-to medium-skill workers to Gulf States, the case of India opens up the opportunity to assess the impacts of different types of emigration on tourism flows. Moreover, the permanence of such migration varies too, affecting the dynamics of Indian diaspora which in turn may have impacts on the development prospects of Indian tourism.

Findings

1. There is a strong correlation between India's migration destinations and its leading outbound tourism destinations, indicating the significance of MLT.
2. Levels of VFR tourism to migration 'hotspots' however correspond to migrant skill levels, as unskilled (and proportionately poorly paid) migrants are less able to support visitors.
3. Migration has contributed to economic development in India through reverse knowledge transfer, which in turn has contributed to growth in inbound and outbound tourism.

2.1.3 Japan

Population (2006, million)	127	Surface area (2006, 1,000 km ²)	378
Population growth (1997-2006, average annual, %)	0.2	GNI (2006, US\$ billion)	4,641
Population density (2006, people per km ²)	343	GNI per capita, Atlas Method (2007, US\$)	37,670
Labour force (2006, million)	66	GDP growth (2002-2006, average annual, %)	1.9
Urban population (2006, % of population)	66.0	Poverty headcount ratio at national poverty line (2004, % of population)	N/A
Age dependency ratio	0.50		

In the past two decades, Japan experienced significant expansion of its migrant population. The number of legally registered foreign residents rose from 1 million to 2 million between the years 1990 and 2005. In 2005, the Ministry of Justice reported a total of 2 million registered (legal) foreigners, distributed as follows: Koreans (599,000), Chinese (520,000), Brazilians (302,000), Filipinos (187,000), Peruvians (58,000), citizens of the United States of America (49,000), with the remainder from across a large range of nationalities. The old Chinese communities can be found in the traditional Chinatown areas of Yokohama and Kobe. The large increase in Chinese population from 120,000 in 1990 to 520,000 in 2005 was driven by the growth of Japanese investments in Mainland China and tourism in both directions. The Brazilians in Japan are descendants of pre-World War II migrants (largely from Okinawa and Kyushu) who were sent by the Japanese government to Latin America. They are mostly temporary migrants (Nikkeijin) employed in low-skilled positions in various industries such as auto parts, rubber manufacture and scrap metal yards. The Filipino migrants in Japan are mostly women employed in the entertainment and service industries. The migrants from developed economies are employed in creative industries (music, fashion, arts), universities (teaching and research), and in government (foreign embassies).

The expansion of migrant population in Japan needs to be set against the background of declining and significantly ageing population in the last two decades. The total number of people over the age of 65 in Japan is about 27 million, which is almost 22% of the country's total population, with about 11.6 million male and about 15.8 million female. Of the elderly, about 22.2 million of them are retired and it is estimated that by 2010, there will be about 37.8 million elderly retirees, and by 2015 about 40.3 million. The effects are widely evident in the increasing health costs, declining enrolment in schools and labour shortages particularly in the health care sector. The immigration policy of Japan states that the solution to these domestic issues is to create a society where elderly and women can actively participate in the labour market and not immigration. Japan has tapped robotisation and IT applications to address the effects of the population structure changes. Recently, however, Japan has gradually relaxed its immigration rules by forging economic partnership agreements with its Asian trading partners. These agreements permit the gradual entry of Asian workers in sectors such as health care and restaurant services.

The link between migration and inbound tourism is not immediate and quite evident. In 2007, Japan received 8.3 million inbound tourists. The leisure and business segments comprised 71% and 19%, respectively. The major tourism markets were the Republic of Korea; Taiwan, China; China; United States of America and Hong Kong, China. Further research needs to be done in order to establish any links between the recent growth in inbound tourism from the Republic of Korea and China and the migrant communities in Japan from these two source countries.

With the ageing of the Japanese population, higher costs of living and health care relative to their retirement funds, more Japanese are choosing to live and work overseas either on long-term stay or permanent basis in destinations such as Australia, Canada, Thailand, Malaysia and the Philippines. There is an increasing trend of Japanese citizens living abroad, from 480,739 in 1985 to 1 million in 2005. 1/3 of the Japanese migrants are accounted for by permanent expatriates residing mostly in the United States of America and Latin America. The Japanese migrants in Brazil and Argentina are products of Japan's pre-World War II emigration policy. In Southeast Asia, the Philippines host the largest number of permanent Japanese migrants. The bulk of the long-term stayers, those who stay in a destination for more than 3 months but with no permanent residence status, can be found in China, Thailand, Singapore and Indonesia. Retirement programmes and communities have been developed by these destination countries to attract more Japanese migrants. The programmes grant special long stay and retirement visas to the Japanese retirees and their families. The impacts on the destination countries include: community development, job generation, management of migration, consumption and investment spending.

These migrants return to Japan to visit their friends and relatives during the spring and summer seasons and go back to their second-home destinations during fall and winter. In some cases, these migrants are visited by their friends and relatives from Japan. The outbound travel volume of more than 17 million in 2007, at least 2 times larger than the inbound market, revealed that about 80% went to the top 10 destinations namely China, the mainland of the United States of America, the Republic of Korea, Hong Kong, China, Thailand and Taiwan, China. However, the link between Japan's outbound tourism and migration is not yet quite evident in the data.

Findings

1. Migration to Japan has contributed to growth in domestic tourism, but its primary economic benefit is its capacity to fill skill gaps, especially in tourism and hospitality and also in arts and fashion.
2. There is a significant opportunity for growing the inbound market by marketing Japan to the Japanese diaspora overseas.
3. The special demands and particular expectations of Japanese pensioners and other non-working migrants across Southeast Asia have created entrepreneurial and other economic opportunities, especially in the healthcare, wellness and hospitality sectors, which in turn have also benefited the local destination population.
4. In those countries that host large Japanese communities, there are significant opportunities to attract high-spending VFR tourists to these destinations.

2.1.4 Philippines

Population (2006, million)	85	Surface area (2006, 1,000 km ²)	300
Population growth (1997-2006, average annual, %)	1.9	GNI (2006, US\$ billion)	128
Population density (2006, people per km ²)	284	GNI per capita, Atlas Method (2007, US\$)	1,420
Labour force (2006, million)	38	GDP growth (2002-2006, average annual, %)	5.2
Urban population (2006, % of population)	63.4	Poverty headcount ratio at national poverty line (2004, % of population)	13.5
Age dependency ratio	0.63		

The Philippines has relied significantly on the global network of 8.7 million Overseas Filipinos (permanent and temporary migrants) as a major driver of economic growth. The 3.7 million emigrant population³, geographically concentrated in the North American region, serves as primary market for Philippine tourism. Equivalent to 4.4% of the Philippine population (WB, 2007), the emigrant communities are set to expand when temporary migrants (from the stock estimate of more than 4 million and mostly based in the Middle East and Asia) decide to reside permanently abroad given the demand for them and the incentives offered by their employers and the foreign governments. This is not a remote possibility particularly for skilled workers as evidenced in the case of health professionals, particularly nurses. The lack of economic opportunities and quality political and social conditions, combined with the growing global demand for their services are driving Filipino parents, young professionals and graduates to leave the country. They ultimately seek to provide better access to decent living, education and health for their families, but sometimes, at very high social costs. Domestic economic expansion driven by direct investments and not remittance is the more sustainable solution to the plight of poverty-stricken Filipinos especially in the countryside. But given the existence of this network of Overseas Filipinos, is there evidence of gains for Philippine tourism? This case is an initial attempt to assess the scope of gains for Philippine tourism and the negative implications of migration on tourism's sustainability.

The permanent migrants⁴ significantly dominate the Filipino populations in North America and Oceania.⁵ The Middle East (particularly the United Arab Emirates, Saudi Arabia, Kuwait and Qatar) and Asia (Hong Kong, China), Taiwan, China, Singapore, the Republic of Korea) serve as the primary destination markets of temporary workers⁶. In the past, the Philippines had been known as primary source of production and service workers (mostly domestic helpers). Starting in the late 1990s, trends revealed the increasing migration of skilled workers and this was most evident among health professionals (e.g. therapists, nurses). The growth in demand for Filipino health workers amidst the poor access to quality health care in the country became a source of concern in government and in the private sector. This development was further aggravated by data and reports of doctors becoming nurses while rural facilities suffer. The same applies to other skilled workers (e.g. architects, engineers) who are leaving the country for better opportunities abroad. There are a number of reasons why Filipinos leave to work and live abroad. The pull factors from other countries include the shortages in number of workers in general, relatively high cost of labour, mismatch between the available workforce and the requirement by projects and plans by the government, attractive economic incentives and packages offered by employers and better local conditions relative to those in the Philippines. Economic incentives serve as very strong pull factor. A comparison of salaries across selected countries corresponding to certain types of skills reveals that nurses, for example, can earn US\$ 4,500 as basic pay per month in the United States of America

3 The World Bank data also reflect the same figure on permanent residents from the Commission on Filipinos Overseas.

4 Immigrants or legal permanent residents are those whose stay does not depend on contracts. They include both foreign and Philippine passport holders who have permanent residence abroad.

5 Relatively high figures of undocumented residents have been noted in the American territories.

6 They refer to those persons whose stay overseas is employment related, and who are expected to return at the end of their work contracts.

compared to US\$ 300 in the Philippines. The last 30 years witnessed the emergence of a 'culture of migration'. Children, adults, men and women have shown support to the millions of Filipinos eager to work abroad, despite the risks and vulnerabilities they are likely to face.

As a policy, the state does not promote overseas employment as a means to sustain economic growth and achieve national development, and that the existence of the overseas employment programme rests solely on the assurance that the dignity and fundamental human rights of the Filipino citizen shall not, at anytime, be compromised or violated (Sec. 2c).⁷ At the same time, the government states that the deployment of Filipino overseas workers, whether land-based or sea-based by local service contractors and manning agencies employing them, shall be encouraged (Sec.2i).

Social institutions have facilitated the migration culture in the Philippines. Government agencies like the Department of Labour and Employment, Philippine Overseas Employment Administration (POEA), Technical Education and Skills Development Authority and Commission on Higher Education have been directed to address the manpower requirements of the local economy and to produce globally competitive workers who can meet international standards. The government attempts to sustain this comparative advantage by "adopting educational, training, and technical/vocational programmes that will make labour supply more elastic. In this context, the technical/vocational and maritime training programmes shall be continuously improved to meet the critical skills needed in a globalizing economy, as identified through industry signals" (Medium Term Philippine Development Plan 2004-2010). Technical and vocational education is important as it "supports the country's goal of poverty alleviation through economic growth by envisioning a globally competent Filipino workforce, which will be gainfully employed in the country and overseas, and be a force in employment and livelihood creation for the nation" (Second Cycle National Technical Education and Skills Development Plan 2005-2009).

Other institutions (e.g. recruitment agencies and schools) also aid migration. There are 812 recruitment agencies that are in-charge of finding jobs for potential land-based migrant workers and 276 manning agencies in-charge of recruiting and finding jobs for seafarers. As of March 2008, these agencies are concentrated in Metro Manila (776 recruitment and 274 manning companies), the nation's capital. The presence of POEA offices (total of 470 branches) all over the country is an indication that the government seeks to manage the recruitment programme on a national scale.

In 2007, the Philippines attracted 3 million foreign arrivals, representing 8% annual growth and with 80% origin from the top 12 markets and 5% from the group of Overseas Filipinos. These visitors contributed US\$ 4.88 billion in foreign exchange receipts. The Overseas Filipino arrivals of 180,739 contributed approximately US\$ 435 million in direct revenues to tourism (8.9% of total foreign exchange receipts during the year) and US\$ 827 million (direct and indirect) to the national economy.⁸ Their main purpose of travel (63%) was to visit friends and relatives. Arrivals from the Republic of Korea accounted for 22% of the 3 million arrivals and ranked as the number one market. The United States of America followed with 20% while Japan ranked 3rd with 14%. On top of these traditional markets, the Department of Tourism (DOT) is now paying closer attention to fast growing, yet currently low volume markets like China, India and Russia.

The international tourism market is supported by 36 international airlines providing at least 140,000 seats per week and at least 35,000 rooms nationwide, with close to half of the capacity concentrated in Metro Manila. Recent air talks with major tourism gateways like Hong Kong and Macau, China, Thailand and the Republic of Korea have contributed to an increase in air seat capacity to support the targets of the DOT. The 2005 Household Survey of Domestic Visitors revealed that about 24 million Filipinos travelled during the first 6 months of the year, while the accommodation reports recorded 15 million domestic travellers in 2007. The recent growth in domestic travel has been facilitated by the availability of more domestic flights and the introduction of alternative modes such as the Roll-On-Roll-Off vessels. The aim of the DOT is to promote investments in tourism that will allow the Philippines to catch up with the capacity of its Asian neighbours and to generate the volume that will significantly

7 Republic Act 8042 (or the Migrant Workers and Overseas Filipinos Act of 1995), the basic policy framework on overseas employment.

8 Direct and indirect expenditures were estimated using the Input-Output table published by the National Statistical Coordination Board.

magnify the employment impact of tourism via more arrivals and more high yielding market segments. The target is to generate US\$ 5 billion in tourism receipts from a volume of 5 million arrivals by 2010. Trends in tourism demand and the infrastructure capacity constrain the achievement of these target volumes.

Outbound travel from the Philippines (Philippine nationals and foreign nationals) was estimated at 2.7 million⁹ in 2006, 28% higher than the volume in 2005. Outbound foreign nationals made up just 1% of the total volume. The biggest segment was composed of leisure travellers (24%) followed by the VFR (18%). The VFR market posted double-digit growth of 36.5% in 2006. The growth of the outbound VFR market in 2005 and 2006 was facilitated by the entry of regional low-cost carriers, both foreign (Tiger Airways, Jet Star Asia, Air Asia) and local (Cebu Pacific). 26% of Philippine nationals went to Hong Kong, China, in 2006. Aside from this, Filipino tourists arrivals to Hong Kong, China, was 35% higher compared to the previous year. Next to Hong Kong, 13% of Filipino outbound travellers went to Singapore in 2006. There is a need to further process the data from the embarkation and disembarkation cards to identify the destinations of the VFR market.

There are some references that clearly point out the implications of migration on sustainable tourism development. To cite, the outflow of health professionals is viewed to impede the sustainability of the medical tourism, long stay and retirement programmes of the government.¹⁰ At the same time, the marketing programmes of the DOT heavily focus on generating demand for the Philippine tourism by the Overseas Filipinos.

Findings

1. There is significant inbound and outbound VFR tourism as a direct result of migration and new products are being developed specifically to cater for these markets.
2. Targeted incentives in specific areas of employment can be effective in helping to stem the 'brain drain' and encourage the eventual return of skilled migrants, but serious gaps have emerged in the medical, tourism and hospitality sectors, which suffer from high staff turnover and limited supply of skilled staff.
3. Remittances are being used to establish home stays and other 'authentic' ecotourism products in rural areas, but tourism is generally not yet seen as a priority investment sector by migrants, and, in any case, remittances tend to go on subsistence, rather than enterprise.
4. There are significant opportunities to build institutional capacity that can promote coordinated investment in tourism by migrants, along with HR development and investment in products for the VFR market to ensure enduring benefit.

2.2 Central America¹¹

There are estimates of 25 million Latin American (LA) born adults living outside their country of origin. Approximately 65% of them send money home on a regular basis, typically between US\$ 100 and US\$ 300 per month, resulting in about 175 million separate financial transactions a year. Almost 75% of LA remittances are sent from the United States of America (approximately US\$ 40 billion), but in recent years western Europe has become the fastest growing destination for LA migrants, resulting in over 12% of the market. There are other significant flows of remittances from Japan to Brazil and Peru and from Canada to Jamaica and Haiti, whilst intraregional flows account for most of the rest.

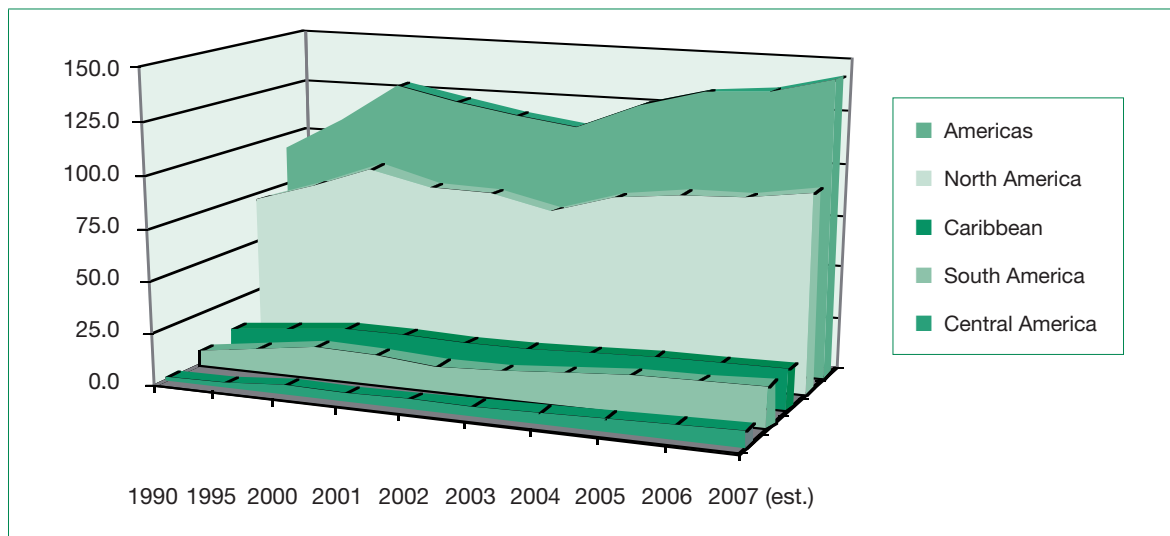
9 Includes those who left for employment purpose.

10 National Strategy and Policy Framework on Cross-Border Health and Wellness Professional Services (2007).

11 For the purposes of this study, according to UNWTO, Central America refers to Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua and Panama. Although Mexico is often considered part of Central America in data collection, the US Census Bureau and the United Nations Population Division consider Mexico part of Central America while the US Office of Immigration Statistics does not.

According to the Inter-American Development Bank (IADB), “Millions of poor people can be brought into the financial system, and remittances can be leveraged by linking flows to local microfinance institutions, home mortgages, and even the securitization of bonds for on-lending to local small businesses”. Workers’ remittances are one of the main sources of foreign currency. Between 2001 and 2006, remittances to Latin America tripled to US\$ 45 billion. This exceeds the combined FDI and net Official Development Assistance (ODA) to the region. In 2007, Mexico was the largest recipient with remittances of US\$ 25 billion, followed by Brazil and Colombia. Meanwhile, growth was widespread throughout the LA region: remittances from Central America to countries in Latin America and the Caribbean (El Salvador, Honduras, and Guatemala) continue to grow robustly and are expected to reach over US\$ 12 billion; Andean countries remittances were over US\$ 11 billion.

Figure 7 Tourist arrivals to the Americas, 1990-2007 (million)



Source: World Tourism Organization.

Tourist arrivals to Central American Countries (CAC) have grown an average of 8.6% during the period 1990 to 2007, increasing from 1.9 million to 7.7 million international visitors. Tourism revenues in 2007 of CAC amounted to US\$ 6.3 billion. The general results of the Americas contrast with the performance observed by the Central American region, which in 2006 experienced annual growth of 11% in the number of international visitor arrivals. Central America has been a locus of migration for generations. It is characterised by rural-to-urban and regional migration, as well as emigration abroad, particularly to the United States of America. Although migration is a phenomenon of the last three decades, it has increased dramatically and consistently since 2000 as result of deterioration of economic conditions in all the CAC, but especially in Costa Rica.

Figure 8 Remittances by selected Latin American Countries, 2004 (US\$ million)

Data source: Inter-American Development Bank.

The importance of remittance flows to the economies of Central America becomes particularly apparent when compared to key economic aggregates, such as GDP, FDI, ODA and exports. In these countries remittances are equivalent to at least 10% of GDP, suggesting a heavy dependence on remittances as an engine of economic activity. Remittances far outweigh both private capital flows and official development assistance. Particularly remarkable in this regard is Guatemala, where remittances are 21 times greater than FDI and 30 times greater than ODA. Remittances across the region, albeit with the exception of Belize, Costa Rica and Panama, are also at least three times greater than tourism receipts. For some decades, there had been a perception that remittances are primarily used for consumption by individual households and rarely, if at all, invested in productive enterprises. Thus the developmental potential of remittances has generally thought to be low and it has been argued that remittances lead not to long-term economic growth but to a passive and dangerous dependency. In contrast, however, an analysis of remittance-receiving households indicates that remittances enable many recipients to escape poverty. The ECLAC study states that remittances have the potential to lift 2.5 million Latin Americans out of poverty.

Findings

1. Both civil society and public sector agencies can be effective in guiding and coordinating local investment initiatives.
2. Recognition of the social and economic value of remittances can lead to banks securitising future remittance flows, significantly enhancing their value as an investment tool.

3. It can be argued that as much as 75% of tourism arrivals and receipts in the region are due to the strong familial ties of migrants in the region, either through historic migration or through contemporary patterns of migration. Migration has been the main driver of tourism growth and development of route capacity.
4. Remittances from migration have massively contributed to mainstream economic development with the opening of many new businesses, including 10 multinational banks, hotel chains, supermarket chains, manpower companies, as well as entertainment centres and more than 500 small hotels and guest houses.
5. There are significant market development opportunities in each country, which (after being realised) require better communication with its diaspora.

2.3 North America: United States of America

Population (2006, million)	299	Surface area (2006, 1,000 km ²)	9,632
Population growth (1997-2006, average annual, %)	1.0	GNI (2006, US\$ billion)	13,232
Population density (2006, people per km ²)	33	GNI per capita, Atlas Method (2006, US\$)	44,970
Labour force (2006, million)	157	GDP growth (2002-2006, average annual, %)	3.0
Urban population (2006, % of population)	81.0	Poverty headcount ratio at national poverty line (2004, % of population)	N/A
Age dependency ratio	0.50		

The United States of America is the largest recipient of migrants in the world and in 2008 it had the second largest volume of inbound tourism visits after France. This case study reveals that the interface of tourism and migration is of considerable economic value, with migration and tourism showing a high degree of inter-linkage. The sheer volume of tourists entering and leaving the United States of America for VFR purposes implies that MLT is in itself of significant economic value. Yet the long history of the immigration to the United States of America means that MLT extends beyond VFR to include diaspora tourism, both outbound in the form of roots tourism and inbound in the form of discovery of locally commoditised migrant tourism products. In addition, TLM has been a major contributor to the development of the tourism industry in that country, with migrant labour filling labour shortages. However, in the aftermath of the '9/11' terrorist attacks, the United States of America has struggled with finding a balance between labour immigration and border security and increasingly migrant labour-dependant tourism operators are struggling to find employees and keep costs down. Moreover, the typical upward economic mobility of immigrants to the United States of America, as well as adoption of the corresponding lifestyle call into question issues related to sustainability. Finally, it is shown that the outward flow of remittances from migrants working in the tourism industry has a negligible effect on the economy of the United States of America, but that their importance to recipient households is considerable and any reduction in their volume caused by changing national immigration policies can have severe economic impacts and even reduce MLT to the United States of America.

The United States of America is in many ways the archetypal migrant nation, having experienced over 200 years of significant inflows which have led to great ethnic diversity. Although initial migration was mainly from Europe, at this stage, Latin America has taken over as the main source. Traditionally, immigration has primarily been for economic and family reunification purposes rather than for asylum. Today's North American immigration policy is to maintain the current levels of immigration and ensure measures to integrate non-citizens into society. The country prides itself on its role as a nation of immigrants, but in recent years, particularly post-'9/11', there has been an increasing demand for

stricter regulation and border controls. The '9/11' terrorist attacks catalysed widespread reforms in the immigration system. The cooperation between federal agencies, state police forces and border control personnel was deemed inadequate; hence responsibility for immigration and border control was assigned to the new Department of Homeland Security (DHS). The 2001 Provide Appropriate Tools Required to Intercept and Obstruct Terrorism (PATRIOT) Act created close ties between immigration and security issues but widening the number of offences for which an immigrant could be deported or detained. More recently, efforts (mostly unsuccessful) have been made to harmonise labour market demands with border control and security concerns. For example, in 2005, the House of Representatives passed a bill (H.R. 4437) aimed at strengthening border control whilst the Senate passed a bill (S. 2611) in May 2006 which reconciled tougher security measures with greater opportunities for legal immigration and obtaining the citizenship of the United States of America. Neither bill was approved by Congress, mainly due to partisan political issues, and to date, no satisfactory solution has been found to addressing the weaknesses in the immigration policy of the United States of America.

With regards to permitting entry for lawful permanent residence (LPR), current immigration policy of the United States of America has four main priorities (CBO 2006):

- to reunite families by admitting immigrants with family members living in the United States of America;
- to admit workers in occupations with strong demand for labour;
- to provide asylum for people at risk of political, racial, or religious persecution in their home countries; and to admit people from a diverse range of countries.

Accounting for over 50% of entries, family reunion is by far the largest channel of entry for LPR. Employment, another means of obtaining LPR, is limited to 140,000 entries a year (plus any unused family reunification places from the previous year) and is governed by a hierarchical preference system.

Tourist arrivals to the United States of America reached 56 million in 2007, which is a 10% increase from 2006 and up 9% from 2000, which had been the previous record year for non-resident visitation. Arrival records were set for 72 countries, only 9 of which were in the top 20 inbound markets, indicating that growth was driven by emerging markets.¹² The North American outbound market also grew between 2006 and 2007, though more conservatively (1%), from 63.6 million to 64.0 million (U.S. Department of Commerce, Office of Travel and Tourism Industries; ITA, 2008). This was its 4th successive year of growth since 2003. All the growth between 2006 and 2007 occurred in overseas markets, with the two largest markets, Mexico and Canada, declining by 1% and 3% respectively. In terms of employment, tourism is one of the top 3 sectors in 29 of the country's 51 states and in 2004 it employed 7.3 million people (Parks *et al.*, 2007). Immigrant labour contributes significantly to the industry, particularly in service roles.

The sheer volume of migration and tourism to and from the United States of America suggests that the interface of the two, be it TLM or MLT, should produce considerable economic benefits. Given its long and constantly evolving history of migration, as well as its recent encounter with terrorism, a number of areas emerge as particularly interesting for analysis in an attempt to grasp the impact that tourism and migration have on continued sustainable development.

Findings

1. Inbound VFR tourism is a function of immigration levels. Outbound VFR tourism is generally related to ancestral tourism, which is a function of historic migration (including slavery). Both flows represent opportunities to build on.
2. Immigration has produced a cultural mosaic in many parts of America, which enhances the tourism product and makes the United States of America an extremely marketable destination that offers cultural affinity to people from all over the world.

12 U.S. Department of Commerce, Office of Travel and Tourism Industries; ITA, 2008, Government website.

3. An unintended consequence of post-'9/11' security measures and immigration restrictions is the creation of obstacles for workers in tourism and hospitality. Countries must appreciate the importance of migrants in these sectors.
4. Some segments of migrants tend to adopt consumerist and environmentally less responsible behaviours. The tourism industry, which employs such a high proportion of migrants, has an opportunity to promote responsible behaviour, so that migration does not lead to environmental degradation.
5. Remittances are of significant value to origin countries (such as those in Central America), whilst the corresponding reduction in purchasing power in the United States of America is not material.

2.4 Europe

Following the significant movements of post-colonial migration from South and Southeast Asia, the Caribbean, as well as from north and Sub-Saharan Africa, the expansion of EU has resulted in significant migration from central and eastern Europe to western Europe, where east European workers are making a significant contribution to the tourism and hospitality sectors. Whilst some immigrants plan to return to their origin country in the future with enhanced skills and qualifications, many have decided to take up residency in their new countries. This has created new issues for government, local authorities and related public agencies in the provision of health and education services and housing. The cost of translation services for public bodies was significantly underestimated, whilst trade unions have argued that cheap migrant labour has undermined the market and resulted in reduced wages and a loss of goodwill.

Real and perceived social conflict as a result of rapid immigration has required PR measures and interventions, whilst a lack of planning has in some cases led to protectionist policies.

Whereas the United Kingdom had operated an open doors policy to the EU10 in 2004, it was subsequently forced to introduce a new quota system for Bulgaria and Romania, the EU's most recent entrants in 2007.

2.4.1 France

Population (2006, million)	61	Surface area (2006, 1,000 km ²)	552
Population growth (1997-2006, average annual, %)	0.5	GNI (2006, US\$ billion)	2,253
Population density (2006, people per km ²)	111	GNI per capita, Atlas Method (2006, US\$)	36,550
Labour force (2006, million)	27	GDP growth (2002-2006, average annual, %)	1.5
Urban population (2006, % of population)	76.9	Poverty headcount ratio at national poverty line (2004, % of population)	N/A
Age dependency ratio	0.53		

France is the world's most popular tourist destination and, with Germany, one of Europe's two leading destinations for migration. Reasons for the considerable magnitude of these flows are diverse and complex, and accordingly so is the analysis of their inter-relationships. Such an examination is rendered even more difficult by the absence of data on VFR tourism and inbound tourism by French nationals. However, there is anecdotal evidence to suggest that both VFR and expatriate tourism flows

are considerable and merit further study in order to enable the realisation of their potential value to the French tourism industry. Moreover, the rapid growth of second-home migration is opening opportunities for wider development and dissemination of tourism benefits. However, France's poor track record of integrating migrants, particularly from north Africa, is creating social issues, most clearly manifested in disadvantaged urban areas, which may detract from the attractiveness of certain parts of French cities. It is important that these issues be addressed as the distinct character of such urban areas offer opportunities for increased tourism and economic development. Immigration in France is steeped in a long history of foreign worker recruitment and a legacy of colonialism. It has risen steadily over the last century and has made large and positive contributions to the French economy. However, more recently, immigration has also become the scapegoat for a number of social problems, resulting in a division of French society and bringing the issue to the forefront of French politics and public attention.

Immigration in France is not a recent phenomenon; the 18th and 19th centuries saw large numbers brought in to fill labour shortages during the industrial revolution. Contemporary immigration gained momentum during the economic boom of the 1950s and 1960s, with France recruiting predominantly male workers from Italy, Portugal, Spain, Belgium, Poland, Germany and Russia. Concomitantly, immigration from former colonies rose as a result of decolonisation and wars of liberation. France stopped its recruitment policy following the economic crisis of the early 1970s, yet immigration continued unabated as French immigrants brought their families over rather than return home. To this date, family reunification remains the largest channel of immigration to France; in 2003, 100,590 family members migrated to France, compared to 52,786 immigrants for education purposes and 24,876 for labour purposes (Focus Immigration: France, 2008). While post-World War II immigration was primarily from Europe (60% in 1962) the proportion has since decreased to a current share of 40%. There are now more immigrants from Africa (42.2%) living in France than from Europe, while the Asian proportion is rising quickly. The net immigration to France in recent years has remained stable at about 100,000 people and has contributed to the growth of the French population. There has been no significant increase in legal and permanent migration from eastern Europe following the expansion of the EU. Since May 2006, easier access was granted to citizens of Estonia, Latvia, Lithuania, Poland, Slovenia, Slovakia, the Czech Republic and Hungary seeking employment in certain economic sectors including the hotel and catering industry and the food industry. Such ease of access was subsequently granted to citizens of Bulgaria and Romania upon their accession to the EU in January 2007. In 2005, about 1.7 million immigrants living in France originated from the EU, 1.5 million from the Maghreb region, 570,000 from Sub-Saharan Africa and about 690,000 from Asia.

The centre-right government of Jean-Pierre Raffarin (Union pour un Mouvement Populaire-UMP) introduced more restrictive immigration policies in 2002, in response to a growing demand for the curbing of social problems related to immigration. Simultaneously, French immigration policy has increasingly sought to maximise the economic benefits associated with immigration by encouraging the admission of highly skilled labour. The Immigration Act of 2006 abolished the automatic legalisation of irregular immigrants having lived 10 years or more in France. It also made the conditions for family reunification more rigorous, created a residence permit for specially qualified workers (intended to encourage highly skilled workers to remain in France) and implemented an obligatory integration contract requiring immigrants to participate in lessons on civil society and language courses. Importantly, the new law facilitates the entry of foreign workers to fill labour shortages, both in unskilled and highly skilled positions, and makes it easier for foreign students graduating among the best in their years from institutions of higher education to stay and find employment.

In 2007, France attracted 81.9 million foreign tourists, a 3.8% increase compared to 2006, making it the world's most popular destination. Nevertheless, although the figure of 81.9 million excludes people staying less than 24 hours, it does include about 14 million visitors whose final destination was not France, such as Europeans crossing France en route to countries like Spain or Italy. In other words, approximately 68 million visitors had France as a final destination in 2007. International tourism accounted for about 2% of France's income and made a significant contribution to the balance of payments. In a 2007 survey by TNS Global for the Ministry of Tourism and the Bank of France – regarding the purpose of visits from the United Kingdom, United States of America, Belgium, Spain, there was no measure of VFR tourism.

The relationship between migration and tourism in France is not immediately evident. France is the largest recipient of foreign visitors in the world and the popularity of France as a leisure/holiday destination means that tourism for other purposes is dwarfed (Direction de Tourisme, 2008). Nevertheless, France has a large diaspora, as well as large numbers of French expatriates abroad. Therefore some inbound tourism is undoubtedly composed of friends and family visiting foreign immigrants in France and of French emigrants returning home. In addition, France is becoming increasingly popular as a second-home destination, a phenomenon which blurs the boundaries of migration and tourism and which may have knock-on effects on both.

Findings

1. Given the importance of ancestral tourism there is an opportunity to promote France as a 'roots' destination in North America and throughout Europe.
2. The French diaspora represents an important market development opportunity for French tourism.
3. 'Second-home' visitors are a growing segment, although they tend not to be counted as 'tourists' or 'migrants', but (together with their own VFRs) represent a loyal market, which can be encouraged, as well as a valuable source of tourism entrepreneurs.
4. There are two particular challenges for tourism associated with immigration. VFR visitors from neighbouring countries tend to rely on car transport, rather than environmentally more responsible train travel; such visitors can be incentivised to be more responsible. A lack of policies on immigrants from north Africa has resulted in social problems in some areas, which consequently affect the destination's attraction; there are opportunities to develop cultural clusters as part of the tourism product and thereby defuse some of the underlying tensions.

2.4.2 Germany

Population (2006, million)	82	Surface area (2006, 1,000 km ²)	357
Population growth (1997-2006, average annual, %)	0.1	GNI (2006, US\$ billion)	2,914
Population density (2006, people per km ²)	236	GNI per capita, Atlas Method (2006, US\$)	36,620
Labour force (2006, million)	41	GDP growth (2002-2006, average annual, %)	1.1
Urban population (2006, % of population)	75.3	Poverty headcount ratio at national poverty line (2004, % of population)	N/A
Age dependency ratio	0.50		

In the 19th Century and the first half of the 20th Century, Germany was primarily a country of emigration. However, with the recruitment of guest workers, the influx of asylum-seekers and ethnic-Germans from eastern Europe and the former Soviet Union (known as Spätaussiedler), Germany has become one of Europe's main destinations for migration since the middle of the 1950s. The Federal Ministry of the Interior has estimated that 6.751 million foreigners¹³ resided in Germany in 2006, equivalent to 8.2% of the population. This figure includes 1.4 million foreigners who were born in Germany. Naturalised foreigners, on the other hand, number 3 million. There are no statistics regarding

¹³ The foreign population includes all persons who are not German citizens.

the numbers of irregular immigrants or immigrants staying without a permit, though unofficial estimates place these at between 500,000 to one million. Turks are the most numerous foreigners, numbering 1.739 million, over three times more numerous than the second-most populous group, the Italians, who number 535,000. In 2005, 579,301 foreigners migrated to Germany whilst 483,584 emigrated, giving a net migration of +97,717. The largest group of immigrants were Polish (147,716), followed by Turks (36,019) and Romanians (23,274).

Germany is facing an ageing population and sees immigration as a potential solution to the many problems associated with such demographic change. Its general immigration policy seeks to maintain the overall level of immigration and to increase the level of highly skilled immigrants. It also has programmes in place to promote and use the potential of the current immigrant population. However, the government is currently unwilling to introduce a points system such as that seen in United Kingdom. Instead, January 2005 saw the enforcement of the “Legal Act for the management and restriction of immigration and for the regulation of residence and integration of EU-citizens and foreigners”, a title which gives an idea of its complexity. The main aim of the Act is to bring legislation in line with social realities and labour market requirements (IOM, 2008), though many contend that the hurdles for highly skilled immigration are much too high.

Germany was ranked the top international tourism spender for the first half of 2006 (UNWTO World Tourism Barometer, 2008) and has been ranked in the top 2 for over a decade, proving the robustness of its outbound tourism market. However, its inbound sector is showing signs of good health too. With a 3.5% growth rate in its inbound sector in 2007, the German tourism industry managed to exceed the levels experienced during the World Cup year of 2006 (German Federal Statistical Office, 2007). Moreover, year on year growth was experienced in international visitors for all months except for the World Cup month of June. The region showing the strongest growth was Europe, with 35.6 million visits¹⁴ equivalent to a 6% growth rate from 2006.

Of the 6 German National Tourism Board (GNTB) regional management areas, southeast Europe was the strongest growth region with a 9.7% increase in overnight stays. The two top performing countries were Slovakia (+33%) and Slovenia (+37%). The new EU states also contributed to a 7.9% increase in overnight stays for the northeast Europe region, with Lithuania (+32%), Latvia (+25%) and Estonia (+17%) representing impressive figures. Germany also recorded growth in all its neighbouring countries, with above average increases Poland (+6%), Austria (+9%) and Belgium (+7%). Tourism from eastern countries is expected to continue to rise rapidly as a result of increasing wages and the large growth in low cost airlines.

The intercontinental markets showed relatively little growth due to a combination of suffering disproportionately from a comparison with the World Cup year and from a weakening dollar. However, the Gulf countries recorded an impressive 9% growth, continuing a steady trend of growth over recent years. The contribution of the Travel and Tourism economy to employment is expected to rise from 3.62 million jobs in 2008 (9.0% of total employment) to 370 million jobs (9.3% of total employment) by 2018 (WTTC, 2007).

The real GDP growth for Travel and Tourism economy is expected to be 0.8% in 2008 and to average 1.9% per annum over the coming 10 years (WTTC, 2007). Evidence of migration's contribution to tourism development in Germany could include VFR visits by foreign nationals, inbound tourism by expatriate Germans and migrant labour in tourism developments. The first two could be described as MLT whereas the latter would be a form of TLM. Unfortunately, although migration is well documented in Germany, the collection of statistics on tourism does not consider VFR and expatriate flows in great detail.

14 This figure exceeds the UNWTO statistics as it records all arrivals at borders, whereas the UNWTO figures only measure overnight visitors.

Findings

1. There is a disproportionate number of visitors from those countries, such as Turkey, which have produced a large number of immigrants for Germany.
2. There is a lack of differentiated data on VFR to demonstrate, which makes analysis difficult.
3. There is mixed evidence as to whether common cultural heritage contributes to VFR tourism or whether in fact it is simply about kin relationships.
4. Inconsistent and uncoordinated immigration policies reduce the measurability of German immigration and thereby reduces the public sector's capacity to manage (and optimise) the benefits of immigration.
5. The EU is playing an increasingly important role in shaping Germany's immigration policy as exemplified by its influence on the 2006 General Law on Equal Treatment and the directive concerning the status of third-country nationals who are long-term residents. The latter grants anyone who has been resident in an EU member state for at least 5 years the right to permanent residence and to take up occupation in the EU.

2.4.3 Turkey

Population (2006, million)	73	Surface area (2006, 1,000 km ²)	784
Population growth (1997-2006, average annual, %)	1.5	GNI (2006, US\$ billion)	402
Population density (2006, people per km ²)	95	GNI per capita, Atlas Method (2006, US\$)	5,400
Labour force (2006, million)	27	GDP growth (2002-2006, average annual, %)	7.2
Urban population (2006, % of population)	68.0	Poverty headcount ratio at national poverty line (2004, % of population)	3.2
Age dependency ratio	0.50		

With a long history of emigration, Turkish immigrant communities have become familiar sights around the world. This case study will look at the propensity for bi-directional tourism travel stimulated by the Turkish diaspora, be it for VFR purposes or cultural exploration. It will compare the propensity for VFR travel of the first Turkish emigrants, who have maintained strong ties with their homeland, with that of second and third generation Turks, who are facing identity crises, being subject to racism outside Turkey and rejection within. It will then look at the changing tides of emigration outflows, assessing how different destinations and the labour contracts involved can impact on MLT. Finally, it will attempt to assess the opportunities for tourism development created by migrant remittances. The study is limited by several key data gaps, in particular statistics on VFR and inbound Turkish tourism numbers. However, given Turkey's important history of migration and its burgeoning tourism industry, understanding better the link between its tourism and migration flows can provide a strong platform for developing its tourism industry in an effective and sustainable manner.

With 4.4 million Turkish migrants currently living all over the world (WB, 2008), 85% of which are located in the EU, Turkey ranks as a major source of migration. Of particular relevance to this study are the post-World War II outflows of migrants which began with the signing of a bilateral agreement on labour recruitment with the Federal Republic of Germany in 1961 and expanded with subsequent agreements with Austria, Belgium, the Netherlands, France and Sweden between 1964 and 1967. During this period, the Turkish authorities encouraged emigration as a means of alleviating the strain

on the domestic labour market caused by a booming population (the current policy is to maintain emigration rates; UNWTO, 2008). Labour migrants were recruited and registered through the Turkish Employment Service, and outflows rapidly gained momentum, peaking in the 1970s. By 1973, 780,000 Turkish labour migrants arrived to western Europe and 80% to Germany alone. However, the first international oil crisis led to policy reforms in 1973-1974 which effectively halted labour recruitment of non-EC labour migrants. Nevertheless, most of the Turkish labour migrants were granted residence permits and were entitled to family reunification. Thus began the second phase of the mass Turkish migration of the 1960s and 1970s – migration for the purpose of family reunification. The migration underwent a fundamental shift from male migrants to females and children who joined their spouses in western Europe and became permanent residents, establishing strong Turkish communities in the EU.

There were other changes in the migration flows too; since official labour recruitment had stopped, irregular migration began growing in volume. In addition, the Middle East and then the former Soviet Union started to gain prominence as a destination for migrants; both are now major destinations for Turkish migration. Yet migration to the Middle East, particularly Saudi Arabia, Libya and Kuwait, is restricted exclusively to male labourers who agreed to return home at the end of their contracts. Given the long history of migration to European countries, these still contain the largest Turkish diaspora, particularly Germany where in 2004 there were 1.74 million Turks with Turkish nationality and a further 415,000 German citizens of Turkish origin (German Federal Statistics Office, 2008).

In the past, Turkey took the view that outbound tourism would deplete valuable foreign reserves intended for essential imports and foreign debt reductions (Halicioglu, 2008). Consequently, the authorities attempted to restrict outbound tourism using a variety of obstacles and policies, e.g. high exit taxes, passport restrictions, limitations on the amount of foreign currency which could be taken abroad, etc. However, Turkey's import substitution-based development policy failed in the late 1970s, resulting in the adoption of an export-led growth development policy and the relaxing of travelling restrictions abroad. Turkish demand for outbound tourism has grown significantly since the 1980s, rising from 515,000 people with of an expenditure of US\$ 12 million in 1970, to 1.65 million spending US\$ 104 million in 1980 and to 8.02 million people with an expenditure of US\$ 2.87 billion in 2005. Contrary to early fears the outbound tourism expenditures have not been a significant burden on foreign reserves, with their share of GDP amounting to only 0.77% in 2005, an increase of 0.71% since 1970 (Halicioglu, 2008). Yet, the average growth rate of outbound between 1970 and 2005 was 9.38% as opposed to a real GDP growth rate of 4.06%, indicating a considerable outbound tourism demand which is only likely to grow stronger should Turkey become a member of the EU in the next decade.

The effects of time on diaspora ties

Nearly the entire first generation of Turkish emigrants spends its annual holidays in Turkey. However, the extent to which second and third generation German Turks identify with Turkey and wish to travel there is much less evident. A survey by Senguel (2008) of second generation German Turks found that the choice destination was governed less by ethnic reunion and much more by leisure opportunities. In fact, Turkey had lost its appeal to a number of them because previous visits to the country as children had left them feeling mistreated and rejected by the host community; they felt like foreigners in their homeland.

Given the importance of tourism to Turkey's economy and the potential value of its significant diaspora, it would seem sensible for the government and tourist-dependent businesses to take measures to increase incentives for Germans of Turkish origin to visit Turkey. Such activities might include diaspora-specific tourist packages, visits to historical and cultural monuments, cultural events and festivals designed to include and even honour returning visitors, and summer schools in language, history, culture, and economics. To date, there is no evidence of any such efforts being made despite the size and potential value of the diaspora.

In spite of fluctuations caused by bombings and other political troubles, inbound tourism is a rapidly growing sector in Turkey. In 2006, 19.82 million foreigners visited Turkey, down from a record of 21.13

million in 2005, but still greater than the 17.52 million in 2004 (UNWTO, 2008), about 2.5 times greater than the 7.49 million in 1999 (Ministry of Culture and Tourism and Central Bank) and an astounding 16.5 times greater than the 1980 figure of 1.2 million foreign arrivals. By far the largest proportion of visitors came from Europe, in particular Germany and neighbouring Bulgaria. A UNWTO study predicts that international visitors to the country will increase by 10% per annum for the next decade, making it one of the most competitive tourism markets in the world. Much of this growth can be attributed to the very intensive marketing of Turkey as a holiday destination by the Turkish government, including an intensification of marketing efforts outside, but in addition to the traditional European markets. Turkey's marketing efforts have generally been focused on sun and beach tourism, although it is increasingly realising the value of its rich heritage as an attraction in its own right. Little to no effort has been directed towards promoting diaspora tourism.

Over four decades have passed since the first large-scale emigration from Turkey. By the early 2000s, the migrants stock had increased to over 3 million workers and their dependents in Europe, more than 100,000 Turkish workers (without dependents due to restrictions) in Arab countries, almost 300,000 settlers in Australia, Canada and the United States of America and nearly 50,000 workers in the CIS countries. This is equivalent to about 6% of the Turkish population (UNWTO, 2008). When added to the 30-40% of the early emigrants who returned permanently to Turkey, it is safe to assume that a sizeable minority at least has had direct or indirect experience of migration. İçduygu (2005) argues that "the potential influence of this movement on Turkey is more than a function solely of numbers; it is also a function of contacts. From the beginning, Turkish emigrants appear to have kept in touch to a particularly high degree – through letters, telephone calls, and remittances – with family and friends in the homeland and many have visited it from time to time on holiday, to attend weddings, or in response to the sickness or death of a relative."

Findings

1. MLT can take a number of forms, both inbound and outbound and there is a clear correlation in the number of immigrants, naturalisations and visitors from origin markets.
2. First generation Turkish emigrants almost invariably visit Turkey every year. There is however less propensity for second generation emigrants to travel back to Turkey, which represents a marketing opportunity for Turkey.
3. In more conservative Arab countries, where Turkish immigrants tend to be male and temporary, there is less evidence of VFR following the flow of migration.
4. Turkish banks are keen to encourage the channelling of remittances into new SMEs, but there is no evidence that tourism is considered a priority sector.

2.4.4 United Kingdom

Population (2006, million)	60	Surface area (2006, 1,000 km ²)	244
Population growth (1997-2006, average annual, %)	0.3	GNI (2006, US\$ billion)	2,385
Population density (2006, people per km ²)	249	GNI per capita, Atlas Method (2006, US\$)	40,180
Labour force (2006, million)	31	GDP growth (2002-2006, average annual, %)	2.5
Urban population (2006, % of population)	90.0	Poverty headcount ratio at national poverty line (2004, % of population)	N/A
Age dependency ratio	0.50		

Immigration and tourism in the United Kingdom are well documented and have historically been considerable in volume. Both make important contributions to the economy although immigration has in recent years become a source of growing concern, particularly with major influxes of migrants arriving from eastern Europe, particularly Poland. The linkages between migration and tourism flows to the United Kingdom have received little attention which is somewhat surprising given the relatively readily available statistics on VFR tourism. This case study will demonstrate how the growth of bi-directional VFR tourism can in some cases almost certainly be attributed to migration, and how understanding better this phenomenon can help maximise the growth of tourism in an era of European expansion. It will also demonstrate the importance of TLM flows to satisfy labour shortages within the industry and call for more careful consideration of such flows of labour in future immigration policy decisions.

From 1951 to 2001, the foreign-born population of the United Kingdom doubled in size to 4.9 million, or 8.3% of the population, and increased a further 10% between 2001 and 2005 to 5.408 million (WB, 2008). The proportion of European-born immigrants fell from 51% in 1971 to 33% in 2001, with 53% of the 2001 immigrant population classified as Caucasian, 12% as Indian, 7% as Pakistani, and other ethnicities making up the remaining 18% (Focus Migration: United Kingdom, 2008). Approximately 0.5-1% of economic growth has been attributed to migrants, although this figure is heavily disputed. Migrants are particularly prevalent in the medical and health sector, where they comprise 31% of doctors and 13% of nurses. They also make up 13% of teaching staff, 70% of catering jobs and the National Farmers Union has estimated that 700,000 migrant workers help with harvesting. In 2006, 591,000 migrants arrived in the United Kingdom, representing the highest number since 1991 and a slight increase of the 2004 estimate of 586,000 (National Statistics Online). With 124,000 Polish immigrants arriving in 2005 and 2006, immigration from Poland surpassed that coming from India to become the second-most common citizenship for immigrants after British.

From 1962 to 2002, United Kingdom's immigration policies remained relatively stable and sought mainly to control the inflow of asylum seekers. 2002 saw the introduction of the seminal White Paper which outlined plans for "managed migration", with an emphasis placed on encouraging high-skilled economic migration. This saw the creation of the Highly Skilled Migrant Programme (HSMP), a points-based scheme which attracted 18,000 migrants to the United Kingdom in 2005 (Focus Migration: United Kingdom). Foreign labour immigration to the United Kingdom has seen a dramatic rise since the 2004 enlargement of the EU granting of access to the A8 countries of eastern and central Europe.¹⁵ Between 1 May 2004 and 30 September 2007, 758,000 A8 nationals registered under the United Kingdom Government's Worker Registration Scheme (WRS)¹⁶, with Polish comprising 66% of the workers. It should be noted that these figures do not include the large number of self-employed entrants who are not obliged to register under the scheme. The 400,000 labour migrants arriving to the United Kingdom

15 The A8 countries are Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia.

16 This scheme gives access to a range of social security benefits and also helps the host country to monitor the number of A8 immigrants. Workers from the pre-2004 EU member states do not require special registration.

in 2004-2005 was second only in Europe to Germany, and represents a large increase from the 183,000 arrivals in 1999 and 245,000 in 2002 (National Statistics Online).

Whereas 82% of workers entering under the WRS system are low-skilled workers from A8 countries, 89% of work permit approvals go to managerial, professional or technical positions, with a majority of 34% obtained by Indian citizens. Work permits to citizens of the United States of America dropped from 33% in 1995 to 11% in 2005. Numbers from Russia and Canada also fell, but Filipinos, South Africans and Chinese experienced large increases. The Highly Skilled Migrant Programme (HSMP) grew by 140% between 2004 and 2005, with more than half of the entrants coming from India and Pakistan. Together with Australians, Nigerians and South Africans, they account for 70% of all HSMP permits. Over 75% of the permits are for the medical, business, IT and financial sectors. The points system was further elaborated in 2006, resulting in a five-tier system whereby points are allocated to applicants based on skills and labour market needs.

The importance of TLM for the United Kingdom's tourism industry

TLM is an important issue to consider in the United Kingdom given that a significant proportion of the tourism workforce is composed of migrant labour. With its close proximity to Europe, the southeast in particular depends on migrant labour to fill vacancies. A quick overview of the tourism labour market in the southeast shows that:

- 44% of the 266,000 hospitality, leisure, travel and tourism jobs are considered 'elementary' occupations, e.g. kitchen staff, waiting and bar staff;
- there are 14,200 vacancies in the sector;
- 39% of the vacancies are 'hard to fill' due to lack of appropriate skills;
- 28% of hotels and restaurants have difficulties recruiting people;
- 15% of the hotel and restaurant positions are 'hard to fill' compared to the national average of 11% (Tourism South East – TSE).

The immigration policy Tier System introduced in 2008 may have grave consequences for the tourism industry in areas such as the southeast. For example, migrants with university degrees and high salaries are defined as high-skilled whereas those without tertiary education in low pay industries are defined as low-skilled and points will be allocated accordingly. Given the nature of tourism industry professions, where requirements are usually based on people skills and vocational training as opposed to academic qualifications, this approach may turn out to harm the industry as many workers will be classified as Tier 2 or 3 despite being highly skilled in their professions. This may severely complicate the filling of the estimated 100,000 vacancies in the United Kingdom tourism industry, especially in front-of-house, catering and service positions.

In their consultation on the introduction of the Tier System, the Tribunal, Courts and Enforcement Act 2007 (TCE) proposed a solution whereby the tourism industry and other industries requiring workers who do not qualify for Tier 1 make a case to the Skills Advisory Board to have the necessary job categories added to the skills shortage list (Tier 2) or to introduce a relevant quota scheme (Tier 3). Such a process is likely to be lengthy and delays could negatively affect the tourism industry which depends on flexible responses to market demand.

Although the potential problems of the new Tier System may be most pronounced in the southeast, the rest of the United Kingdom is likely to face similar issues. TLM is an integral part of United Kingdom's tourism industry and warrants further consideration in future policy decisions.

Inbound tourism to the United Kingdom rose from 24.2 million in 2002 to 32.7 million in 2006 (UNWTO 2006), with numbers increasing by 9.2% between 2005 and 2006 alone. Outbound tourism in 2006 was greater than inbound at 69.5 million, although its growth between 2005 and 2006 was slightly

lower (4.7%). The United States of America was the United Kingdom's largest source of tourists in 2006 (3.9 million), followed by France, Germany, the Irish Republic, Spain, Netherlands, Italy, Poland, Belgium and Australia. The period 2002-2006 saw Poland emerge as the fastest growing source of visits to the United Kingdom, increasing from 0.2 million to 1.3 million – an increase of 1.1 million. Spain followed in second, increasing by 1.0 million, then Germany (0.9 million) and France (0.6 million).¹⁷

2002-2006 also saw visits to Poland increase by 1.1 million, the second highest absolute increase in visits after Spain (1.9 million). Spain and France still dominate the outbound tourism market in 2006, receiving 14.4 million and 10.9 million visitors respectively equivalent to about a third of outbound United Kingdom travel, although their share is falling over time.¹⁸

MLT is strongly evidenced by growth in outbound tourism from the United Kingdom to places associated with migrant origins, such as Poland, but even more so by the growth in inbound tourism to the United Kingdom, where VFR is a growing sector, accounting for 6.94 million visits in 2002 (26% of all inbound tourism) and reaching 9.64 million visits in 2006 (30% of all inbound tourism) (ONS, 2008). This represents a faster growth than business and holiday trips for the same period and accounts for 23% of overall visitor expenditures. In 2004 (when the A8 joined), VFR tourism overtook business tourism for the first time, making it the second most common purpose for visits to the United Kingdom. Moreover, it is the only segment showing consistent growth since 1999 and has grown from 23% of visits in 2000 to 30% in 2007 (VisitBritain, 2007).

MLT is bound to some extent by geographical distance and perhaps more importantly by GDP per capita. A global view of VFR visits in 2004 shows that 67% of VFR visitors to the United Kingdom came from Europe and 17% from North America (ONS, 2004), with only 16% coming from the rest of the world. Europe's dominance of the inbound VFR market is not surprising; the countries are geographically close, the majority is developed countries and most require no visa arrangements. Historically, the VFR tourism segment has been largely neglected because of its perceived low-value; in 2006 about 90% stayed with friends and relatives rather than in commercial accommodation.

However, the value of this market has likely been undervalued and has the potential to make significant contributions to the United Kingdom's economy. Although the average visitor expenditure per day on VFR trips (£ 36) is considerably lower than that for business trips (£ 128) and general holidays (£ 75), VFR trips also tend to be longer, averaging 10 nights (ONS, 2007). Additionally, a host's spending will typically increase during a visit by friends and relatives too, such as on extra food, drink, gifts and activities. In their study on VFR tourism in Scotland, Boyne and Hall (2004) found that when host expenditure is added to visitor expenditure, the average expenditure per day is similar to that of other tourists. Moreover, the European Travel Council ETC (2002) found that hosts are likely to spend more per VFR trip than guests.

Emigrants, immigrants and VFR tourism

The clearest evidence of MLT is growth in VFR tourism (Jackson, 1990; Murphy et al., 1993; King, 1994; Paci 1994; King and Gamage, 1994; Morrison et al., 1995; Seaton and Tagg, 1995a; Williams and Hall, 1999), whereby the migrants travel back to visit their families and/or friends, or where the migrants are visited by their friends and relatives.

In the United Kingdom, inbound tourism for VFR purposes is a growing sector, accounting for 6.94 million visits in 2002 (26% of all inbound tourism) and reaching 9.64 million visits in 2006 (30% of all inbound tourism) (ONS, 2008). This represents a faster growth than business and holiday trips for the same period and accounts for 23% of overall visitor spend. In 2004, VFR tourism overtook business tourism for the first time, making it the second most common purpose for visits to the United Kingdom. Moreover, it is the only segment showing consistent growth since 1999 and has grown from 23% of visits in 2000 to 30% in 2007 (VisitBritain, 2007).

17 Office for National Statistics (2008), 'Record number of tourist and short-term visits to & from the UK in 2006' in: *Travel Trends 2006*.

18 Idem.

Though there is little concrete evidence, the rapid rise in VFR tourism would appear to be closely linked to the recent large increase in migration. Perhaps the best proof would be the concurrent surge in Polish immigrants and tourists. Between 2002 and 2006, a period coinciding with Poland's accession into the EU, Polish tourists accounted for the second largest rise in visits to the United Kingdom (1.1 million) behind the Spanish.

However, VFR tourism extends beyond recent immigrants and their friends and families; the British diaspora contributes to VFR tourism too. For example, in 2004 VFR tourism accounted for a significant 40-50% of all visits from New Zealand, South Africa and Canada, regions which historically have experienced significant British emigration (VisitBritain, 2007).

Moreover, in an increasingly globalised world, expatriate tourism must also be considered. British expatriates' visits are a significant tourism segment, making up the largest proportion of nationalities visiting the United Kingdom at 12%, just ahead of Americans at 11%. This then is not only irrefutable evidence of the link between tourism and migration; it also suggests that migration may be behind some of the largest tourism flows in the world.

With regards to outbound visits for VFR purposes, the top four countries were the Irish Republic, France, Spain and Poland (VisitBritain, 2007). The Irish Republic, France and Spain have long ties with the United Kingdom in terms of British emigration, seasonal tourism, holiday homes, etc. However, Poland does not have the same traditional ties; hence its appearance in 2004 coincides exactly with Polish EU membership and the large influx of Polish immigrants to the United Kingdom. As such, we have evidence that migration leads to bi-directional VFR tourism, that is, inbound and outbound.

On the downside, the rapid rise in MLT will necessarily have environmental impacts on carbon emissions. Nevertheless, encouraging more sustainable forms of travel should not be directed towards VFR travel alone; instead such efforts should be aimed at the entire tourism industry. All the same, despite being an island destination, it would be wise to offer incentives on more sustainable transport modes to and from VFR hotspots, such as France, Spain, Ireland and Poland. Aside from inbound and outbound travel, research by Lennon (2001) on the social impacts of VFR tourism in rural Scotland show it to be a sustainable phenomenon; it requires little additional infrastructure, it is usually small-scale, it occurs throughout the year rather than being concentrated at peak times and there are few employment issues created by downturns in its volume.

The relatively large amounts of information on VFR tourism to and from the United Kingdom, as well as the considerable growth of migration to the United Kingdom for work, study and residence, particularly following the 2004 EU expansion, provide researchers with a welcome opportunity to analyse links between migration and tourism.

Findings

1. VFR tourism is a significant and growing sector, but – apart from the recent example of Poland – there is no clear evidence of a correlation between immigration and tourism growth.
2. The correlation between immigration and tourism growth is a function of accessibility and relative affluence. Thus, India and Jamaica generate proportionately less inbound tourism than Poland and Lithuania.
3. The conventional view of VFR tourism being 'low value' is wrong, and in fact makes a significant contribution, although its social and economic benefits can be more subtle.
4. Growth in the number of overseas students provides a significant market development opportunity for the United Kingdom both through the attraction of students' friends and family in the short term, but more importantly through the recruitment of loyal customers in the long term.

5. Being an island destination, which primarily relies on air transport for access, there are negative environmental impacts associated with growth. But these can be mitigated by encouraging visits to rural areas that have no seasonal restrictions and can benefit socially and economically from employment opportunities.
6. New immigration policies could have damaging consequences for the tourism and hospitality sectors, as they are likely to prevent low-skill positions being filled.
7. Immigrants are tending to stay for shorter periods; this will have policy implications, but requires further investigation.

Conclusions

This final chapter reports the study's main findings that provide a basis for further action. The following statements are indicative of those areas in which specific recommendations are made.

- Migrants' remittances and MLT can be a tool of development, and poverty reduction.
- Migrants' remittances can constitute a powerful instrument for enhancing tourism-related investments in basic infrastructures at community-based level or for creating small tourism businesses in the countries of origin.
- Measurement problems to assess the linkages between tourism and migration flows persist in both origin and host countries.
- There is a need to identify knowledge gaps to enable government and other policy makers to prioritize their actions and to include a migration perspective in their respective national tourism development planning and poverty reduction strategies.
- Institutional changes regarding migration flows are required in order to harness their economic and social benefits, including the tourism development.

The recommendations summarised below include policy lessons and present key indicators of migration impacts on tourism development policies and focus on practical and action-oriented outcomes.

Finding	Recommendation for origin countries	Recommendation for destination countries
MLT can significantly contribute to development and poverty alleviation.	Permit migration and encourage VFR tourism. Avoid overdependence on tourism prospects.	Research migrant profiles and networks in order to develop effective marketing strategy and new revenue streams.
Migrants' remittances can constitute a powerful instrument for enhancing tourism-related investments in basic infrastructures at community-based level or for creating small tourism businesses in the origin countries.	Promote tourism as a target sector for investment of remittances. Avoid 'double taxation' on returning migrants who wish to develop new tourism enterprises. Permit FDI in tourism, but encourage active management by indigenous partners.	Reduce charges and restrictions on remittance transfers. Encourage sharing of know-how in order to promote international partnerships.
Some countries are better at utilising migration flows than others.	Identify areas in which country needs to develop know-how and which can benefit from the promotion of specific emigration programmes.	Identify knowledge and resource gaps and seek to address these through targeted immigration promotion policies.
The lower the level of development in origin countries, the greater the contribution of migration.	Permit migration to areas where there are opportunities to gain relevant know-how.	Encourage cooperative policies to fight poverty in LDC in line with Millennium Development Goals (MDGs).

Finding	Recommendation for origin countries	Recommendation for destination countries
Institutional changes are required to accompany and assist migration flows in order to harness their economic and social benefits, including the field of tourism development.	Negotiate employment conditions and specific apprentice schemes with destination countries.	Trade unions and employer organizations need to ensure protection of migrant workers. Employment rights of native workers should also be extended to immigrant workers. Special protection needs to be given to female immigrants.
Inconsistency of data and diversity of situations prevent to quantitatively demonstrate linkages between tourism and migration.	Differentiate outbound VFR movements and inbound emigrant visits within travel and tourism statistics in order to understand MLT and develop marketing strategies.	Differentiate VFR tourism in order to understand MLT and develop appropriate marketing strategies.
Restrictions on immigration in highly developed countries are restricting tourism development.	Negotiate visa arrangements with key destination countries.	Reconsider 'points' systems that discriminate workers in tourism and hospitality sectors.
Migration from origin countries is leading to a 'brain drain' and 'skill drain' in less developed countries.	Facilitate return of emigrants with tourism management and entrepreneurial skills. Encourage enterprise development.	Provide immigrants working in tourism and hospitality with access to internationally recognized 'certified' training and apprentice schemes.
Diaspora networks represent a critical factor in development.	Maintain official contact with migrant communities.	Engage opinion leaders within immigrant communities as a part of marketing strategy for migration-related tourism.

The recommendations are addressed to national and local governments and agencies, including tourism organizations, pointing out the best ways to address opportunities and challenges related to migration and tourism development.

Whilst approximately 20% of the tourism economy is related to migration, it is also estimated that travel and tourism accounts for at least 20% of migrants' expenditure and the sector's contribution is becoming increasingly important. Tourism and migration linkages have many unexplored potentialities to further increase their contribution to national economies. The results of this study showed how significant are policy interventions by governments to maximise the benefits of migrants flows to balance labour shortages in many countries. It also demonstrates that tourism receipts and remittances are a fresh source of investment for many countries. The case studies attested the chief contribution of tourism and migrants revenues to GNI, employment and trade of developing countries. Its impact in the poorest ones has been crucial to advance in the achievements of UN MDGs, in particular poverty reduction and mainstreaming gender in the production process and improving of living conditions.

Information and communication technologies (ICT) are the main drivers of the deepening of linkages between travel, tourism and migrations, making more cost-effective international monetary operations and current transactions of businesses and individuals. Technologies and specialised networks are approaching the diasporas and expatriates among themselves and with their local communities. The increasing number of on-line tools available to consumers segments of diasporas is strengthening the value added chain on travel of migrants and tourism demand. The diaspora market has become one of the most flourishing tourism target markets.

3.1 Follow-up Actions

Major stakeholders in the interface between migration and tourism include national governments and their NTAs, the private sector and trade unions, immigrant associations and the international community, as represented by its respective organizations, primarily the intergovernmental ones. Competence is widely dispersed, but there are clearly leading and secondary or subsidiary agents at the national level. Tourism interests are hardly represented at national decision making bodies and neither can it be expected that an NTA should have competence in migration matters, whether with regard to outbound or inbound flows. It can be pointed out that managing migration for development requires a great deal of coordination, political will and commitment, a thorough knowledge of tourism products and mechanisms, along with creativity and vision. It is on this basis that the following recommendations are made to the stakeholders concerned.

3.1.1 Governments

Governments are invited to acknowledge the positive contribution of migrations to world tourism and hence to development and its sustainability, and to adopt programmes aimed at releasing the potentialities of tourism to make constructive use of migrations in this respect.

Governments of developed economies are encouraged to recognise that discriminatory policies and measures aimed at immigrants from developing countries should be reconsidered with a view to bringing such policies and measures, at least at a mid-term, to common international standards of non-discrimination and national treatment, and to act according to the principle that the more vulnerable the immigrants, the more assistance they should be offered, in particular with respect to facilitating immigrants' engagement in productive activities in the tourism sector.

On a bilateral and international plan, national governments of both migrants sending and receiving countries are invited to continue and intensify measures with a view to enhancing the migrants' capacity of mobility. This can be achieved by ensuring transparency and non-discrimination in admission procedures, through the acquisition and recognition of professional skills and standards to be made available to arriving and returning migrants, and, eventually, the facilitation of settlement.

As direct actors in international agreements and negotiations, such as those of the World Trade Organization (WTO-GATS), as well as regional economic agreements, governments should endeavour to put in place the long-awaited multilateral commitments regarding the movements and presence of natural persons as one of the modes of supply of services which is of particular value to tourism. When it comes to trade measures barring immigrants from starting a productive activity and making an investment, it is advisable that the governments concerned abolish the limitation known in WTO as an 'economic need test' for an activity to be granted market entrance.

Governments should monitor inward and outward migration by means of an observatory and statistical data, thus allowing them to adopt informed policies and measures for sound management of migration flows and their participation in productive activities. With the engagement of their National Tourism Administration and the help of their private tourism sector they are invited to keep records of migrants' participation in tourism activities and to establish for this purpose a suitable system of indicators. In so doing, they should also collaborate in this regard with the migrant sending countries and the International Organization for Migration (IOM).

3.1.2 National Tourism Administrations (NTAs) and National Tourism Organizations (NTOs)

In order to make most of the synergy between migration and tourism and act accordingly at Government level, it corresponds to the NTA to take initiatives in this respect. NTA's role within Governments could be to create a platform where national stakes and interests in migration with respect to the tourism

sector should be brought together and coordinated. The platform in question should include other government agencies having direct competence in migration issues and the tourism private sector.

It should be a direct responsibility of NTA to establish the observatory on tourism and migration, on which basis government policies and measures could be discussed and adopted in order to take informed decisions and manage migration in the tourism context.

Through their contributions, diasporas are important players in the funding of development projects in their countries of origin. There is therefore a need to better document and to disseminate successful experiences of the contributions of diasporas to development of tourism in the local communities of origin countries. NTAs should explore modalities of cooperation and strategic promotion to develop investment project in the tourism sector in the local communities and tourism products to cater for their travel needs. Furthermore, joint works of NTA and trade negotiating authorities should take advantages of trade negotiations and GATS commitments and to capitalise benefits of inter-linkages of tourism and migration i.e., to make effective the free movement of tourists across countries under mode two (M2) and the movement of service providers under mode four (M4) of GATS.

Following previous experience in targeting diaspora communities in tourism marketing and promotion, NTOs should not miss the new opportunities as a result of the increasing volume and directions of migration in the globalizing economy, where large numbers of immigrants, thanks to new information and communication technologies, tend to maintain their national and ethnic identity and hence the cultural capacity to re-visit their countries of origin and to attract visits by their families and friends.

Among many options, NTOs are encouraged to capitalise on tourism trends in the migration and diaspora context, such as large family reunions and other affinity events involving collective participation in travel, which can also be assisted by the use of information and communication technologies.

3.1.3 Private Sector

The private sector in the developed economies has various roles to play: to apply to immigrant workers the principle of national treatment in accordance with binding international and national regulations, to restrain from irregular employment which in most countries is illegal and puts at a disadvantage both immigrant and domestic workers, and to involve immigrant workers in professional qualification since training and empowerment schemes are particularly needed in the tourism sector for ensuring a reliable and good quality service.

Entrepreneurs should use the asset of immigrant workers as their staff members for creating company networks with the countries of origin of these workers as a contribution to sustainable, mutually-supporting business activities.

Following the example of the companies which have already taken measures in this direction, all tourism companies are invited to adopt and adhere to Corporate Social Responsibility schemes, which can be based either on best practices and international standards (ISO 26000), or tailor-made to their specifics, always paying attention to the specific needs and cultural identities of their immigrant workers.

3.1.4 International Community

Since international migration related to tourism is a global phenomenon, it is also incumbent upon international organizations to deal with migration issues, each in its own field of competence, where various conflicting and overlapping interests can be reconciled and tourism interests could be accommodated as well. In other words, it is unlikely that tensions around migration can be eased only for the sake of tourism, but tourism will benefit if there will be more understanding of migration, more fairness and more concerted action in favour of easing inequalities regarding the access to migration.

Market access, i.e. the mobility of tourists and migrant workers in international markets, is an issue of increasing concern in many governmental and non-governmental organizations, as it is also a very sensitive area of trade negotiations, including GATS, FTAs, RTAs and economic unions. In this connection and going forward, further joint work is needed amongst NTAs and migration and other relevant international organizations in order to adopt guidelines to assure the respect of existing conventions and trade commitments and facilitate the formulation and implementation of non-trade-distorting safety and security standards.

The international community as a concert of nations is already well equipped to deal with migration in most sensitive areas. There is a whole body of international instruments and machinery which can help: the IOM networks, the ILO conventions, the WTO agreements, the UNWTO Global Code of Ethics for Tourism. In addition, there are quite a few brave initiatives focusing on thorny problems, such as entry visas. What is still lacking is the political will which is needed to tackle realities and encourage common responsibility between developed and developing nations. The cooperation between global organizations which have already available instruments in place and the Governments can help to progressively ease problems, provide more security and, eventually, close global agreements. Such long-expected agreements will not be for the sake of migration alone, but rather as a part of a comprehensive, well-informed and constructive approach to sustainable development. The tourism sector can definitely contribute to these efforts.

Universally accepted concepts and definitions and comparable reliable international statistics and indicators are crucial to benchmark performance and contribution of migrations and tourism to economy, as well as to assess the impact of their linkages, in particular in developing countries. In this connection, UN bodies and regional banks may implement joint pilot projects and case studies in most significant countries in different regions to quantify the impact in development. Intergovernmental organizations should familiarise their constituencies with the potentialities of multiplier effects of migrant travel and remittances in general and, within their respective competence, in the areas of tourism and community development in particular.

International organizations are well positioned to assume a central role in dealing with tourism issues related to migration and migration issues related to tourism. This will require a partnership approach between a range of agencies.

The development of a series of key indicators in this relationship would facilitate the formulation of consensus-based policy, its implementation at national and regional levels, and contribute to the formulation of evidence-based international policies for the responsible and effective management of tourism and migration, so intimately related phenomena, in both cause and effect.

Arrivals by Purpose of Visit, by Region, 2007 Estimates (Million)

	Total	Leisure, recreation and holidays	Business and professional	VFR, health, religion, other	Not specified
International Tourist Arrivals (million)					
World	904	462	135	244	64
Europe	487,9	263,1	76,1	146,7	2,1
Northern Europe	58,1	26,7	14,4	17,0	0,0
Western Europe	154,9	94,8	27,6	32,6	0,0
Central/Eastern Europe	96,6	19,7	13,4	63,5	0,0
Southern/Mediter. Eu.	178,2	121,9	20,6	33,6	2,0
Asia and the Pacific	182,0	89,1	28,3	35,6	29,0
North-East Asia	101,0	42,5	14,7	15,0	28,9
South-East Asia	59,7	32,1	10,8	16,7	0,1
Oceania	11,2	6,4	1,9	2,9	0,1
South Asia	10,1	8,2	0,9	1,0	0,0
Americas	142,9	60,2	17,9	32,3	32,5
North America	95,3	28,8	10,2	24,0	32,3
Caribbean	19,8	14,6	2,2	2,9	0,0
Central America	7,8	4,3	1,7	1,6	0,2
South America	20,1	12,6	3,8	3,7	0,0
Africa	45,0	26,0	5,7	13,3	0,0
North Africa	16,3	8,0	0,8	7,5	0,0
West Africa	4,1	1,5	1,8	0,8	0,0
Central Africa	0,8	0,3	0,2	0,3	0,0
East Africa	10,6	6,3	2,3	2,1	0,0
Southern Africa	13,2	10,0	0,7	2,5	0,0
Middle East	46,6	23,2	7,0	16,5	0,0
	%				
World	100	51	15	27	7
Europe	100	54	16	30	0
Northern Europe	100	46	25	29	0
Western Europe	100	61	18	21	0
Central/Eastern Europe	100	20	14	66	0
Southern/Mediter. Eu.	100	68	12	19	1
Asia and the Pacific	100	49	16	20	16
North-East Asia	100	42	15	15	29
South-East Asia	100	54	18	28	0
Oceania	100	57	17	26	1
South Asia	100	81	9	10	0
Americas	100	42	13	23	23
North America	100	30	11	25	34
Caribbean	100	74	11	15	0
Central America	100	55	21	21	2
South America	100	63	19	18	0

	Total	Leisure, recreation and holidays	Business and professional	VFR, health, religion, other	Not specified
International Tourist Arrivals (million)					
Africa	100	58	13	29	0
North Africa	100	49	5	46	0
West Africa	100	37	43	19	0
Central Africa	100	34	28	38	0
East Africa	100	59	21	20	0
Southern Africa	100	76	5	19	0
Middle East	100	50	15	35	0

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO September 2009)

Annex

Arrivals by Purpose of Visit, by Selected Countries, 2007 Estimates (Million)

	Visitors (1000)	of which by purpose of visit						Not specified (1000)
		Tourists (1000)	Series	Leisure, recreation and holidays (1000)	Business and professional (1000)	VFR, health, religion, other (1000)	%	
Europe								
Northern Europe								
Denmark	22.624	4.770	VF	21.449	1.175	0	0	0
Finland	5.736	3.519	VF	2.308	1.696	1.732	30	0
Ireland	..	8.332	TF	4.420	1.108	2.804	34	
Norway	6.017	4.377	TF	3.296	1.082	0	0	
United Kingdom	32.778	30.871	VF	10.758	9.496	12.524	38	0
Western Europe								
Belgium	..	7.045	TF	4.605	2.440	0	0	
France	195.901	81.940	TF	59.340	8.636	13.964	17	
Monaco	..	328	TF	251	77	0	0	
Central/Eastern Europe								
Armenia	..	511	TF	294	175	42	8	
Azerbaijan	1.333	1.011	VF	40	1.185	108	8	0
Belarus	5.283	105	VF	2.947	446	1.890	36	0
Bulgaria	7.726	5.151	VF	4.219	376	3.131	41	0
Georgia	1.052	..	VF	19	71	14	1	948
Hungary	39.379	8.638	VF	10.468	1.624	27.287	69	0
Kazakhstan	5.311	3.876	VF	116	1.260	3.934	74	1
Latvia	5.236	1.653	VF	1.737	724	2.748	52	27
Lithuania	4.214	1.486	TF	448	424	614	41	
Poland	66.208	14.975	TF	2.660	4.085	8.230	55	
Rep Moldova	15	13	TF	6	9	0	2	
Russian Federation	22.909	20.605	VF	2.214	3.270	17.425	76	0
Turkmenistan	..	8	TF	5	3	0	0	
Ukraine	..	23.122	TF	1.445	958	20.719	90	0
Uzbekistan	..	903	TF	80	111	712	79	
Southern/Mediter. Eu.								
Albania	2.580	2.515	TF	187	66	873	35	1.389
Andorra	10.743	2.189	VF	9.890	456	397	4	0
Cyprus	2.671	2.416	TF	1.973	175	268	11	0
Israel	2.294	2.068	TF	537	227	1.303	63	1
Italy	70.271	43.654	VF	31.677	11.992	26.601	38	1
Malta	1.732	1.244	TF	993	99	152	12	
Portugal	23.766	12.321	VF	16.835	4.124	2.772	12	35
San Marino	2.164	69	VF	930	584	649	30	1
Slovenia	61.293	1.751	TF	1.018	340	393	22	0
Spain	98.907	58.666	TF	47.752	5.275	5.639	10	
Turkey	23.341	22.248	VF	17.219	2.228	3.571	15	323

	Visitors (1000)	of which Tourists (1000)	by purpose of visit				%	Not specified (1000)
			Series	Leisure, recreation and holidays (1000)	Business and professional (1000)	VFR, health, religion, other (1000)		
Asia and the Pacific								
North-East Asia								
China	131.873	54.720	TF	13.141	6.961	6.008	11	28.610
Hong Kong (China)	28.169	17.154	TF	9.416	3.516	4.222	25	
Japan	8.347	..	VF	5.954	1.576	817	10	0
Korea, Republic of	6.448	..	VF	4.388	359	1.701	26	0
Macao (China)	26.993	12.942	VF	21.324	2.969	2.699	10	1
Mongolia ('06)	390	386	TF	128	80	178	46	
Taiwan (pr. of China)	3.716	..		1.648	1.031	1.037	..	
South-East Asia								
Brunei Darussalam	877	179	TF	75	36	67	38	1
Cambodia	2.015	1.873	TF	1.690	146	37	2	
Indonesia	..	5.506	TF	3.195	2.161	149	3	1
Lao P.D.R.	1.624	1.142	VF	1.299	179	146	9	0
Malaysia	28.325	20.973	TF	6.884	2.987	11.102	53	
Myanmar	716	248	VF	168	35	513	72	0
Philippines	..	3.092	TF	1.439	451	1.152	37	50
Singapore	10.285	7.957	VF	4.124	3.168	2.993	29	0
Thailand	..	14.464	TF	12.016	1.817	631	4	0
Vietnam	4.229	..	VF	2.620	652	972	23	-15
Oceania								
American Samoa ('06)	..	25	TF	8	5	13	51	0
Australia	5.644	..	VF	2.827	1.309	1.509	27	-1
Cook Is	..	97	TF	80	4	13	13	0
Fiji	542	540	TF	399	36	105	19	
French Polynesia	..	218	TF	200	12	6	3	0
Guam ('05)	..	1.228	TF	938	37	210	17	43
Kiribati ('06)	11	4	TF	0	1	2	38	1
Marshall Is	..	7	TF	2	2	3	38	
Micronesia (Fed.St.of)	..	21	TF	14	6	1	7	0
N. Mariana Is	389	385	VF	389	0	0	0	0
New Caledonia	224	103	TF	71	17	15	15	0
New Zealand	2.466	2.434	VF	1.211	330	914	37	11
Niue	..	3	TF	2	0	1	35	0
Palau	..	93	TF	84	4	5	5	
Papua New Guinea	..	104	TF	28	70	6	6	0
Samoa	..	122	TF	44	12	66	54	0
Solomon Is	..	14	TF	4	6	4	27	0
Tuvalu	..	1	TF	0	0	1	64	
Vanuatu	167	81	TF	63	11	7	9	
South Asia								
Bangladesh	..	289	TF	142	133	14	5	0
Bhutan	..	21	TF	21	0	0	0	
India	5.244	5.082	TF	4.807	275	0	0	
Maldives	..	676	TF	676	0	0	0	
Nepal	..	527	TF	319	54	153	29	1
Pakistan	..	840	TF	128	213	499	59	
Sri Lanka	592	494	TF	343	57	94	19	0

	Visitors (1000)	of which by purpose of visit						Not specified (1000)
		Tourists (1000)	Series	Leisure, recreation and holidays (1000)	Business and professional (1000)	VFR, health, religion, other (1000)	%	
Americas								
North America								
Canada	30.373	17.931	TF	9.604	2.587	5.577	31	163
Mexico	92.179	21.370	TF	8.302	840	12.228	57	
United States	..	55.986	TF	10.871	6.785	6.236	11	32.094
Caribbean								
Anguilla	164	78	VF	69	8	86	52	1
Antigua,Barb	935	262	TF	204	11	47	18	
Aruba	1.254	772	TF	718	35	19	2	0
Bahamas	4.601	1.528	TF	1.131	168	229	15	
Barbados	1.191	575	TF	493	58	23	4	1
Bermuda ('06)	635	299	TF	202	57	40	13	
Cayman Islands	2.008	292	TF	219	21	52	18	
Cuba	2.152	2.119	TF	1.989	12	118	6	0
Curaçao	664	300	TF	283	12	4	1	1
Dominica	437	88	TF	71	10	1	1	7
Dominican Rp	4.365	3.980	TF	3.681	159	140	4	
Grenada	406	129	TF	68	26	36	28	
Haiti	868	386	TF	135	17	234	61	
Jamaica	2.880	1.701	TF	1.296	104	301	18	
Martinique	573	501	TF	399	80	22	4	0
Montserrat	9	8	TF	4	2	2	25	
Saint Lucia	905	287	VF	234	11	43	5	617
St.Vincent,Grenadines	328	90	TF	74	15	1	1	
Trinidad Tbg	526	449	TF	303	85	61	14	0
Central America								
Belize ('06)	903	247	TF	235	12	0	0	0
Costa Rica	2.302	1.980	TF	1.597	278	105	5	
El Salvador	1.720	1.339	TF	379	343	617	46	
Guatemala	1.628	1.448	VF	732	342	553	34	1
Honduras	1.337	831	TF	268	250	313	38	0
Nicaragua	978	800	TF	607	144	49	6	
Panama	1.428	1.103	TF	510	333	69	6	191
South America								
Argentina	..	4.562	TF	3.855	707	0	0	
Bolivia	..	573	TF	339	32	185	32	17
Brazil	..	5.026	TF	2.221	1.437	1.367	27	1
Chile	..	2.507	TF	1.306	456	745	30	
Colombia ('05)	933	..	VF	581	266	86	9	0
French Guiana	..	109	TF	25	67	17	16	
Paraguay	3.005	416	TF	200	46	170	41	
Peru	2.452	1.916	TF	1.804	49	63	3	0
Suriname	..	163	TF	42	17	104	64	
Uruguay	1.815	1.752	VF	1.193	111	511	28	0
Venezuela	913	771	TF	246	219	305	40	1

	Visitors (1000)	of which		by purpose of visit			%	Not specified (1000)
		Tourists (1000)	Series	Leisure, recreation and holidays (1000)	Business and professional (1000)	VFR, health, religion, other (1000)		
Africa								
North Africa								
Algeria	1.743	..	VF	326	185	0	0	1.232
Morocco	7.701	7.408	TF	4.089	185	3.133	42	1
Sudan	..	436	TF	279	100	57	13	
West Africa								
Burkina Faso	..	289		83	211	80	..	
Gambia	487	143	TF	126	2	14	10	1
Ghana ('06)	..	497	TF	99	189	209	42	0
Guinea ('06)	47	46	TF	8	20	18	39	0
Guinea-Bissau	..	30	TF	12	9	9	30	
Niger	..	48	TF	11	25	12	25	
Nigeria ('06)	3.056	1.111	VF	1.222	1.527	306	10	1
Sierra Leone	..	32	TF	4	11	17	53	
Central Africa								
Angola	..	195	TF	54	28	112	58	1
Cent.Afr.Rep. ('06)	..	14	TF	2	6	6	45	0
Dem.R.Congo	..	47	TF	8	26	13	28	
Sao Tome Prn ('06)	..	12	TF	7	1	5	41	
East Africa								
Burundi ('06)	..	201	TF	66	64	71	35	0
Comoros	..	15	TF	3	4	7	50	
Eritrea	81	..	VF	6	10	65	80	0
Ethiopia	..	312	TF	129	61	122	39	
Kenya ('06)	1.601	1.644	VF	1.308	331	201	13	-239
Madagascar	..	344	TF	213	99	32	9	
Malawi	..	735	TF	212	305	217	30	1
Mauritius	933	907	VF	819	35	79	8	0
Mozambique	1.259	771	TF	261	351	159	21	
Reunion	..	381	TF	125	52	204	54	
Rwanda	826	..		21	276	529	..	
Seychelles	171	161	TF	147	8	6	4	0
Tanzania	719	692	VF	580	57	81	11	1
Uganda	..	642	TF	140	110	392	61	
Zambia	..	897	TF	204	340	353	39	
Zimbabwe	2.508	..	VF	2.106	379	23	1	0
Southern Africa								
Botswana	..	1.990	TF	393	113	1.484	75	
Lesotho	300	292	TF	109	46	145	50	
Namibia	1.048	929	TF	474	89	365	39	1
South Africa	9.208	9.091	TF	8.572	310	209	2	
Swaziland	1.230	870	VF	586	165	479	39	0
Middle East								
Bahrain	7.379	4.935	VF	5.274	1.045	1.514	21	-454
Egypt	11.091	10.610	TF	10.366	95	149	1	
Kuwait	4.482	293	TF	27	21	244	83	1
Qatar ('06)	..	946	TF	240	722	0	0	
Saudi Arabia	13.479	11.531	TF	591	2.659	8.280	72	1
Syrian Arab Republic	5.434	4.158	VF	2.272	435	2.728	50	-1

Glossary

A8	The 8 central and east European countries that were part of the 'EU10' (see below)
APEC	Asia Pacific Economic Cooperation
ASEAN	Association of Southeast Asian Nations
BOP	Balance of Payments
CAC	Central American Countries
DVS	Development-Visa Scheme
EAC	East African Community
ECA	Europe and Central Asia
ECCAS	Economic Community of Central African States
ECOWAS	Economic Organization of West African States
EPA	Economic Partnership Agreement
ETC	European Travel Commission
EU	European Union
EU10	The 10 countries that became EU member states in 2004 ¹ , comprising the A8 (see above) and also the small states of Cyprus and Malta
FDI	Foreign Direct Investment
FIT	Free Independent Traveller
FTA	Free Trade Agreement
GATS	General Agreement on Trade in Services
GDP	Gross Domestic Product
GNI	Gross National Income
IADB	Inter-American Development Bank
ICAO	International Civil Aviation Organization
ICT	Information and Communications Technology, which includes 'IT' (see below)
ILO	International Labour Organization
IMF	International Monetary Fund

1 As part of the EU's largest ever expansion, 10 countries joined at the same time. The largest (by population in 2004) were Poland (39 million), Czech Republic (10 million) and Hungary (10 million).

IMO	International Maritime Organization
IOM	International Organization for Migration
IT	Information Technology
LDC	Least Developed Country
M4	Mode Four (of General Agreement on Trade in Services)
MDGs	Millennium Development Goals
MERCOSUR	Common Market of the South
MICE	Meetings, Incentives, Conferences and Exhibitions (approximately 'business tourism')
MLT	Migration-led Tourism
NTA	National Tourism Administration/Authority
NTO	National Tourism Organization
OECD	Organization for Economic Co-operation and Development
RTA	Regional Trade Agreement
SADC	Southern African Development Community
SME	Small and Medium Enterprise
TIA	Travel Industry Association
TLM	Tourism-led Migration
UN	United Nations
UNDESA	United Nations Department of Economic and Social Affairs
UNSD	United Nations Statistics Division
UNWTO	World Tourism Organization
VFR	Visiting Friends and Relatives
WB	World Bank
WTO	World Trade Organization

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