

Kerala Migration Survey 2023

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Abstract

The Kerala Migration Survey (KMS) 2023 is in its ninth round of a long-standing series of migration monitoring studies running globally. Since 1998, K.C. Zachariah and S. Irudaya Rajan have pioneered a unique approach to study all aspects of migration from Kerala. Originally undertaken by the Centre for Development Studies (CDS) in Thiruvananthapuram, the 2023 edition of KMS was conducted by the Gulati Institute of Finance and Taxation (GIFT), with funding from the Department of Non-Resident Keralites' Affairs (NORKA), Government of Kerala with technical support from the International Institute of Migration and Development (IIMAD). The KMS 2023 was conducted in three phases. The phase 1 panel survey of 2023 covered 10000 households with 11 types of panel sets. This short paper is based on the phase 2 survey with 20000 households. The phase 3 focussed on specialized surveys targeting student migration, return migration, climate change and women, children and elderly left behind.

Keywords: *Emigration, Remittances, Kerala, Student migration, Panel data*

Since the first historic Kerala Migration Survey (KMS) conducted in 1998 by K C Zachariah and S Irudaya Rajan, there has been an increasing trend of Keralites moving abroad, from 1.4 million in 1998 to 1.8 million in 2003 and 2.2 million in 2008, reaching its peak in 2013 with 2.4 million emigrants. However, in 2018, Kerala observed a steady decline in labour migration with the number of emigrants estimated at 2.1 million. This is understood to have

happened due to the changing demographics in Kerala, stringent nationalization policies in the Gulf after the global economic crisis, economic downturns, company closures, shifts in the labour market demands and competition from countries such as those in Africa, which offer emigrants willing to work for lower wages.

After the last round of KMS in 2018, Kerala experienced unprecedented floods causing severe destruction. This was followed by the global lockdown, due to the COVID-19 pandemic in 2020 and 2021. This led to large-scale return migration, job losses, compulsory repatriations, expired visas, increasing fear of deportations, economic disruptions, and wage theft. In his budget speech on 11 March 2022, the Finance Minister of Kerala told the assembly that 1.4 million non-resident Keralites, comprising two-thirds of 2.1 emigrants estimated by the KMS 2018, returned to the state in the aftermath of the pandemic. The Department of Non-Resident Keralites Affairs (NORKA), the Government of Kerala, initiated the ninth round of KMS in 2023 in response to the recommendations of the 3rd Loka Kerala Sabha of 2022 to examine the recent trends in migration, return migration, and remittances. The KMS 2023 was conducted by the Gulati Institute of Finance Taxation (GIFT) with technical support from the International Institute of Migration and Development (IIMAD).

About KMS 2023

The Kerala Migration Survey (KMS) commenced in 1998 with an initial sample size of 10,000 households which was later expanded to 15,000 households in 2018. The sample size of the 2023 iteration of KMS saw a further increase, reaching 20,000 households (suggested by K C Zachariah, Founder President of IIMAD) across 14 districts and 77 Taluks of Kerala, selected through a stratified multistage random sampling method. In this approach, rural and urban areas within each of the 14 districts were considered distinct strata, resulting in 28 strata.

Consequently, 500 localities were selected statewide, and 40 households were identified within each of these localities using a systematic random sampling method at the time of the survey. This methodology ensured a truly representative sample, encompassing all taluks across the 14 districts. Covering 20,000 households, the KMS 2023 is one of the largest socio-economic surveys conducted in Kerala since the state's formation in 1956. To provide a comparison, the National Family Health Survey (NFHS-5) was conducted among 12,330

households in Kerala. Additionally, the KMS 2023 found that about 28 per cent of households surveyed were female-headed, which is 2.7 per cent more than the 2011 census figure of 25.3 per cent. Notably, the 9th round of KMS marked the transition from traditional pen and paper surveys to a digital format, utilizing the Kobo Toolbox for data collection with the help of more than 300 trained investigators throughout Kerala.

Emigration from Kerala

According to the KMS 2023, the number of emigrants from Kerala is estimated to be 2.2 million, closely aligning with the 2.1 million recorded in the KMS 2018. This stability in international migration over the last five years is interesting, given the overall declining trend observed over the past decade in the previous rounds of KMS. Although there is a slight increase of 32,388 emigrants in 2023, 9 out of the 14 districts in Kerala observed a considerable decline in the number of emigrants when compared to 2018, indicating a saturation of international migration. Despite expectations of a further decline in this round of KMS, a significant rise in student emigration has substantially contributed to maintaining the emigration levels in 2023. From 129,763 student emigrants in 2018, the number has doubled to about 250,000 in 2023. This notable increase in student emigration underscores a significant shift in the demographics of emigrants from Kerala, wherein there has been an increase in the number of emigrants leaving at a very young age, as early as 17 years. The KMS 2023 has revealed that students constitute 11.3 per cent of total emigrants from Kerala, indicating that a growing number of younger individuals are choosing to emigrate, particularly for educational opportunities abroad.

In 2023, there has been a slight decrease in the number of emigrants per 100 households when compared to the previous years. However, despite this decrease, nearly half of the households surveyed have experienced migration in some form or the other, either through emigration or return emigration. Two out of five households in Kerala were found to have non-resident Keralites, indicating the significant presence of migration experiences within the economy and society. Of the 20,000 households surveyed, 16.2 per cent reported having at least one emigrant, which is a slight decrease from the 17.3 per cent reported in 2018. However, in 2023, the total number of Non-Resident Keralites, including both emigrants and return emigrants, is estimated to be 4 million, marking an increase from the figure of 3.41 million recorded in 2018. During the KMS 2023 data collection, many homes were found to be locked, because entire families had migrated. About 4.2 lakh (0.4 million) cases of family

migration have been identified as part of KMS 2023. The global Malayali diaspora is estimated to be 5 million, whereas the Malayali diaspora outside Kerala, within India, is estimated at 3 million.

Tirur taluk in Malappuram district continues to lead in the number of emigrants. It has maintained its lead from the previous years, with slightly more than 100,000 emigrants in 2023. On the other hand, Devikulam taluk in Idukki district has recorded the lowest number of emigrants. The northern region of Kerala remains a focal point for migration, encompassing the majority of emigrants. Malappuram was the origin of nearly 377,647 emigrants in 2023. With regards to the religious distribution of the emigrants from Kerala, Muslims lead at 41.9 per cent, followed by Hindus at 35.2 per cent and Christians at 22.3 per cent. The destination countries have also seen changes over the years, with the Gulf Cooperation Council (GCC) countries remaining the strongest corridor. There had been a shift from Saudi Arabia as the most preferred destination, to the United Arab Emirates (UAE) according to the data from the last few rounds of KMS. UAE retains the same position in 2023 as well. However, there has been a decline in the number of emigrants choosing GCC countries from 89.2 per cent in 2018 to 80.5 per cent in 2023. Simultaneously there has been a rise in the number of emigrants preferring non-GCC destination countries, from 10.8 per cent in 2018 to 19.5 per cent in 2023. The rising student migration and their preference for non-GCC countries could be responsible for this shift.

The proportion of female emigrants has increased from 15.8 per cent in 2018 to 19.1 per cent in 2023. Female migration has further seen a shift from GCC countries to Europe and other Western nations as destination countries, accounting for 40.5 per cent. However, for males, this figure stands at 14.6 per cent. In terms of education, 71.5 per cent of female migrants were found to have completed degree-level education as opposed to only 34.7 per cent of male emigrants. Male migrants continue to dominate emigration from Kerala, with the gap between male and female migrants being narrowest in Kottayam and widest in Malappuram.

Return migrants

The number of emigrants who have returned home is estimated to be 1.8 million, a significant increase from 1.2 million in 2018. This increase over the last few years had been expected due to the global health crisis-induced economic disruptions, stricter immigration policies, and a significant reduction in available job opportunities. Many migrants found themselves in

an untenable position, unable to find new employment while also facing mounting pressures. A substantial number of them were thus compelled to return to their home countries, driven by the loss of jobs, compulsory resignations, and other pandemic-related challenges. The major reason for return was found to be job losses/layoffs, as reported by 18.4 per cent of return migrants. Only 4.4 per cent of the returnees had come back after accomplishing their goals for migration. UAE, the most preferred destination for emigrants, is also the country from which Kerala has the highest returnees, amounting to 36 per cent of the total returnees.

Remittances

According to KMS 2023, the total remittances to Kerala saw a significant surge after the pandemic. Total remittances reached Rs 216,893 crores in 2023 from Rs 85,092 crores in 2018, marking a 154.9 per cent increase. The total remittances of Rs 216,893 crores imply a remittance of Rs 61,118 per capita for a population of 3,549 crores. A similar trend of increased remittances to households is also captured by KMS 2023, wherein the remittances sent by the emigrants to Kerala households amounted to Rs 37,058 crores, reflecting a 20.6 per cent increase from the 2018 figures. A considerable increase is also seen in the average remittance per emigrant household, rising to Rs 2,23,729 in 2023 compared to Rs 96,185 in 2018. While remittances to Kerala have been increasing over the years, the number of households receiving these remittances has declined from 16 per cent of households in 2018, to 12 per cent in 2023. Kerala holds a steady 21 per cent share of India's NRI deposits, a figure that has remained consistent since 2019. Needless to say, these inward remittances play a significant part in strengthening the economy of the state. Remittances constituted 1.7 times the revenue receipt of the state. The share of remittances, as a per cent of Net State Domestic Product (NSDP), has seen an increase to 23.2 per cent in 2023 from 13.5 per cent in 2018. For the first time, we have estimated an outward remittance of Rs 43,378 crores which is about 20 per cent of the inward remittance, using the KMS 2023 data.

Interestingly, Kollam district surpassed Malappuram this year in terms of household remittances. Kollam received 17.8 per cent of the remittances, compared to Malappuram's 16.2 per cent of the total household remittances. Similar to the previous years, Muslim households continued to receive the highest share of remittances, accounting for 40.1 per cent, followed by Hindu households at 39.1 per cent, and Christian households at 20.8 per cent. About 73.3 per cent of the emigrant households receiving remittances were observed to have received remittances every month. With regards to the use of remittances, it is found

that 15.8 per cent of remittances were allocated for renovating houses or shops. While 14.0 per cent of remittances were used to pay off bank loans and 10.0 per cent was used for education purposes.

Internal migration

KMS 2023 estimates a total of 0.5 million out-migrants from Kerala. Like previous years, Karnataka, Tamil Nadu, and Maharashtra remain the top three states for out-migration, return-out-migration, and student migration. Palakkad records the highest number of out-migrants estimated at 55,601, followed by Ernakulam at 53,756 and Kollam with 48,330 migrants. Notably, there is a significant decline in unemployment for out-migrants; the unemployment rate declined from 15.1 per cent before migration to 2.4 per cent after migration. The majority of both out migrants and return out migrants are male, accounting for 64.4 per cent and 75.2 per cent respectively. However, student out-migration is more prevalent among females at 57.8 per cent, whereas the rate of female student return out-migration is lower at 35.8 per cent. This suggests a pattern wherein female students prefer to migrate and remain in the destination states.

Policy prescriptions

The migration trends highlighted by KMS 2023 have significant implications for Kerala's demographic composition and economy, requiring myriad policy interventions. One notable trend is the dramatic increase in student migration, with the number of student emigrants nearly doubling in the past five years. There is an urgent need to enhance the state's educational infrastructure and provide resources that ensure safe migration pathways for future student emigrants. Ensuring the regular monitoring and regulation of language training centres and recruitment agencies is crucial for reducing instances of deceit and fraud by migration agents. It is also important to develop new policies that will encourage Malayalee international students to return home after acquiring valuable skills abroad, fostering a wave of brain gain.

Given that 76.9 per cent of Kerala's emigrants are labour emigrants, it is essential to improve and strengthen their skills to help them secure better employment opportunities and pay abroad. Programs like the Additional Skill Acquisition Programme (ASAP), focusing on imparting job-ready skills, should be expanded to include skill development for emigrants. This approach could increase the likelihood of emigrants choosing non-GCC (Gulf

Cooperation Council) countries as their destinations. The prioritization of Memorandums of Understanding (MoUs) with new and emerging destination countries will also facilitate smoother migration governance. Additionally, the growing number of return migrants necessitates comprehensive rehabilitation and reintegration measures. The dynamic nature of migration flows can only be understood by studying them at regular and frequent intervals. A smaller version of the Kerala Migration Survey (KMS), with a sample size of approximately 5,000 households, could be conducted annually to accurately track key indicators.

KMS 2023 estimates a Loka Kerala Sabha (LKS) of about 13.3 million migrants. Despite migrants constituting almost one-third of Kerala's population (38 per cent), we have not been fully successful in unleashing their true potential. With a diaspora of 5 million Malayalees, the time is ripe to think about a Migration Development bank, following the example set by the Asian Development Bank. Enhancing migration infrastructure while ensuring access to redressal mechanisms and supporting diaspora organizations, will greatly maximize the potential of Kerala's migrants and their role in Kerala's development.

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	Return Emigrants	Emigrants	Return Out-migrants	Out-migrants
Chirayinkeezhu	66781	43112	4043	2611
Nedumangad	33370	10585	2334	4749
Thiruvananthapuram	48042	29478	639	1533
Neyyattinkara	37502	24741	6566	6055
Thiruvananthapuram	185695	107917	13582	14948
Karunagappally	35022	32540	8527	12272
Kunnathur	12055	16583	5132	5783
Pathanapuram	19890	46447	3686	5826
Kottarakkara	37903	56979	10808	14488
Kollam	53610	43266	8416	9961
	Return Emigrants	Emigrants	Return Out-migrants	Out-migrants
Kollam	158481	195815	36569	48330
Thiruvalla	11801	17698	6300	5257
Mallappally	6249	9706	1541	3251
Ranni	5804	17412	0	1451
Kozhencherry	10374	29287	4909	5584
Adoor	6693	27521	1012	9003
Pathanamthitta	40921	101624	13762	24546
Cherthala	13094	13118	10031	12617
Ambalappuzha	14029	24679	12558	6098
Kuttanad	7487	12364	1138	5796
Karthikappally	16217	33630	6638	5539
Chengannur	14962	12698	2370	3952
Mavelikkara	33705	37628	10198	8299
Alappuzha	99494	134116	42932	42301
Meenachil	14245	37065	6646	6694
Vaikom	11116	32193	7333	9033
Kottayam	28809	39964	17606	18061
Changanassery	12972	17667	2972	6737
Kanjirappally	7135	16935	2704	3559
Kottayam	74277	143824	37261	44084
Devikulam	0	860	0	1146
Udumbanchola	4268	13392	905	4520
Thodupuzha	8608	7875	2974	3096
Peerumedu	596	3177	596	1788
Idukki	13472	25304	4475	10550
Kunnathunad	18527	25176	4311	9649

Aluva	15447	27793	3198	4157
Paravur	13119	18023	7628	2101
Kochi	37019	30088	2599	5868
Kanayannur	50856	53572	32249	27523
Muvattupuzha	14118	18052	2210	1958
Kothamangalam	2763	14252	2499	2499
Ernakulam	151849	186956	54695	53756
Talappilly	43251	49767	17669	4739
Chavakkad	47007	54164	4992	7424
Thrissur	47810	35254	28376	15041
Kodungallur	40830	31440	3361	2475
Mukundapuram	60541	62552	12627	10193
	Return Emigrants	Emigrants	Return Out-migrants	Out-migrants
Thrissur	239439	233177	67026	39874
Ottappalam	42791	73286	9312	18544
Mannarkad	12961	10250	1238	4102
Palakkad	17112	20314	14544	21943
Chittur	5230	7474	0	6611
Alathur	14595	12953	0	4401
Palakkad	92689	124277	25094	55601
Ernad	52589	57359	828	2210
Nilambur	63696	42470	2231	744
Perinthalmanna	22964	48747	0	2302
Tirur	70058	109133	11873	8418
Tirurangadi	122933	80379	0	0
Ponnani	18936	39559	601	2626
Malappuram	351176	377647	15533	16300
Vadakara	64949	69148	4082	12094
Quilandy	64830	59882	7412	9844
Kozhikode	80509	64667	7551	22557
Kozhikode	210288	193697	19045	44496
Mananthavady	6657	9288	2445	4084
Sulthan Bathery	8060	15966	1408	8515
Vythiri	1792	7087	2567	6578
Wayanad	16509	32341	6420	19178
Taliparamba	27232	60164	5287	9746
Kannur	25248	58717	5425	9932
Thalassery	53927	93326	8395	23866
Kannur	106408	212208	19107	43544
Kasaragod	22243	47492	1217	6161

Hosdurg	27819	37881	571	8757
Kasaragod	50062	85372	1788	14918
Kerala	1790758	2154275	357289	472426