

QUARTERLY MIGRATION REPORT

FEBRUARY 2020

This summary of the latest migration trends uses data produced by the Office for National Statistics every quarter. This update covers the period ending September 2019¹.

Overall, net migration has remained stable since late 2016; albeit net migration from EU countries has fallen sharply while net migration from non-EU countries has increased.

The impact of this on the UK labour market is primarily focussed on occupations at the lower-to-mid skills levels (levels 1 to 3). Currently, EU citizens are free to take-up any employment in the UK, while non-EU citizens can generally only seek employment in *skilled* roles (levels 6+) with a minimum salary level.

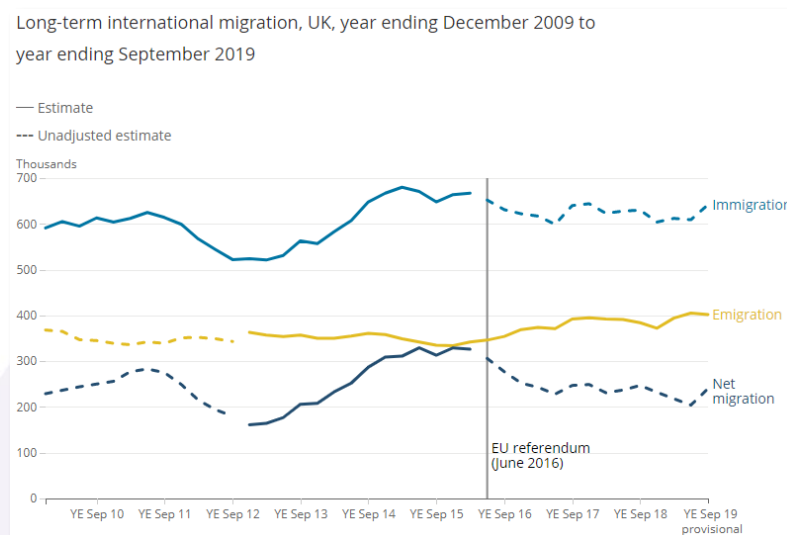
From January 2021, unless special provisions are made, all immigrants seeking work in the UK, whether they're from the EU or outside, will be subject to the same criteria – including requiring the offer of a skilled job, with a sponsoring employer, earning a minimum salary (other criteria will also apply). Therefore, the supply of foreign nationals to work in lower-to-mid skilled roles will be significantly lower than pre-2016 levels.

In the year ending September 2019, long-term international migration continued to add to the UK population, as an estimated 240,000 more people moved to the UK with an intention to stay for 12 months or more than left the UK (net migration).

Long-term net migration, immigration and emigration have remained broadly stable since the end of 2016. However, there are different patterns for EU and non-EU migration – both overall and by main reason for migration.

Over the year, 642,000 people moved to the UK (immigration) and 402,000 people left the UK (emigration).

Since 2016, there has been a decrease in immigration for work, but recently levels have remained broadly stable. Over the same period, immigration for study has been gradually increasing.

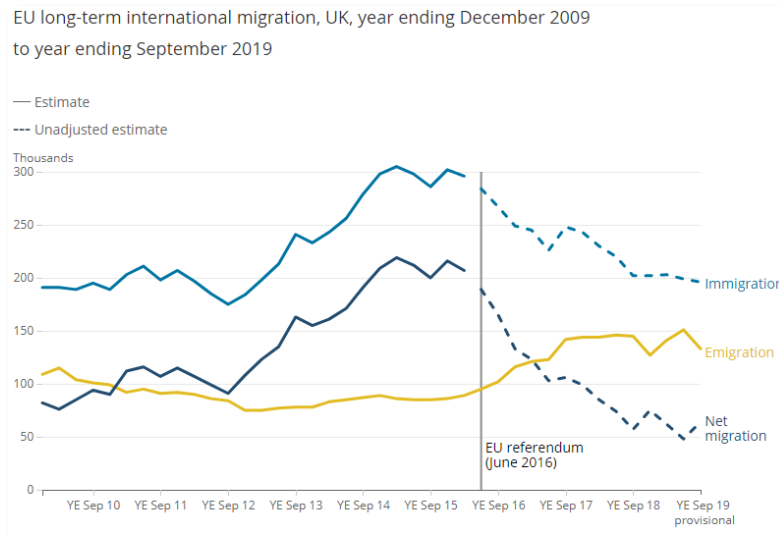


1 Migration Statistics Quarterly Report: February 2020. Long-term international migration data from the Office for National Statistics (ONS) are largely based on a survey, so these statistics are estimates based on a sample, not precise figures. The next update will be published on 21 May 2020.

EU migration

Following peak levels of over 200,000 in 2015 and early 2016, EU net migration has declined and stands at 64,000 in the year ending September 2019.

This is largely because of a fall in EU immigration. This is reflected by a decrease in the number of EU migrants arriving in the UK with the intention of staying for 12 months or more for work-related reasons.



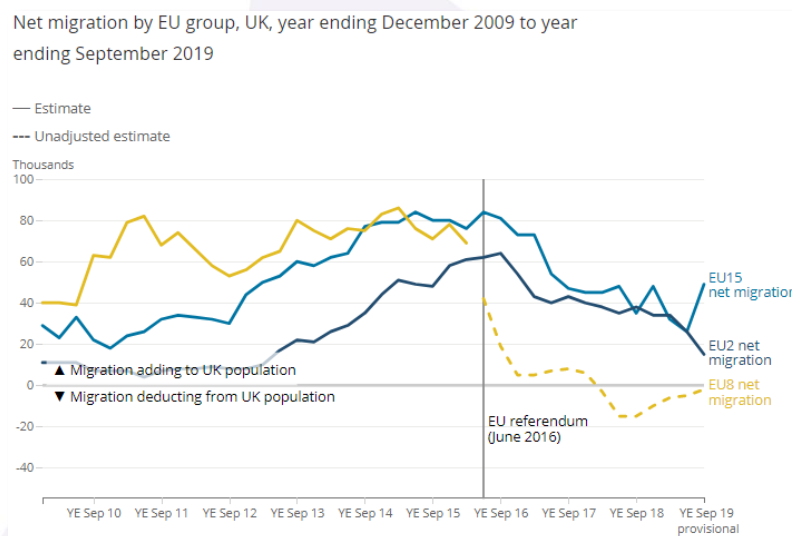
The decline in EU net migration since 2016 was a trend seen for all EU groups.

While net migration for EU15⁴ citizens has fallen since 2016, it has remained broadly stable in the last two years.

The largest decrease has been seen in EU8² citizens.

For both the EU2 and EU15 (and EU nationals as a whole) there are still more people arriving to stay for more than 12 months than leaving.

In the last year, net migration from EU2³ countries has more than halved, driven by an increase in those leaving the UK.



2 EU8: Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, Slovenia.

3 EU2: Bulgaria and Romania.

4 EU15: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden, United Kingdom.

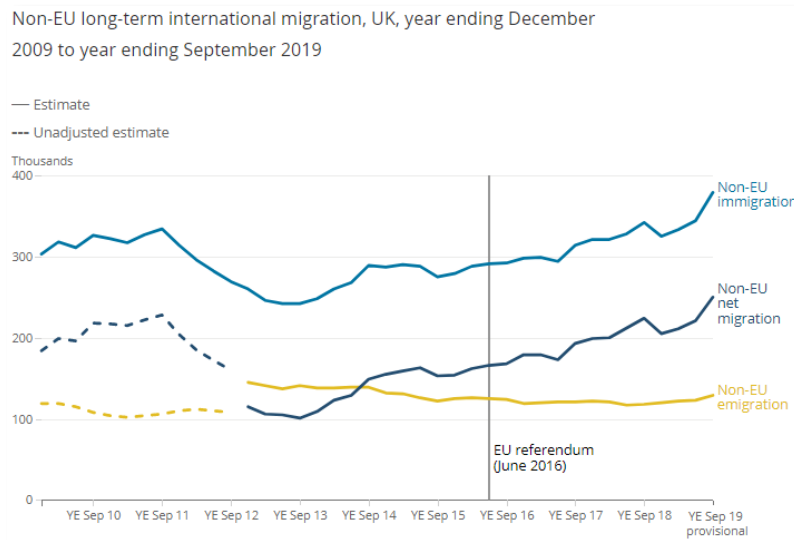
Non-EU migration

An estimated 250,000 more non-EU citizens moved to the UK than left in the year ending September 2019. This net estimate has gradually increased since 2013 and, as at the year ending September 2019, is at the highest level since 2004.

This is largely because of a rise in non-EU immigration, now at the highest level on record, while emigration has remained broadly stable.

The rise in non-EU immigration is mainly driven by more migrants arriving for formal study.

The increases in non-EU immigration since 2013 have mainly been driven by a rise in the number of Asian citizens – particularly South Asian and East Asian citizens coming to the UK, now at 265,000 in the year ending September 2019, a trend reflected in all available data sources.



EU and non-EU nationals working in the UK labour market

For the period October to December 2019, there were an estimated 2.31 million EU nationals working in the UK, and an estimated 1.34 million non-EU nationals working in the UK.

Since 2009, the number of EU nationals working in the UK has generally increased but has been broadly flat since the latter half of 2016. The number of non-EU nationals working in the UK remained broadly stable up until early 2019 but has increased slightly since.