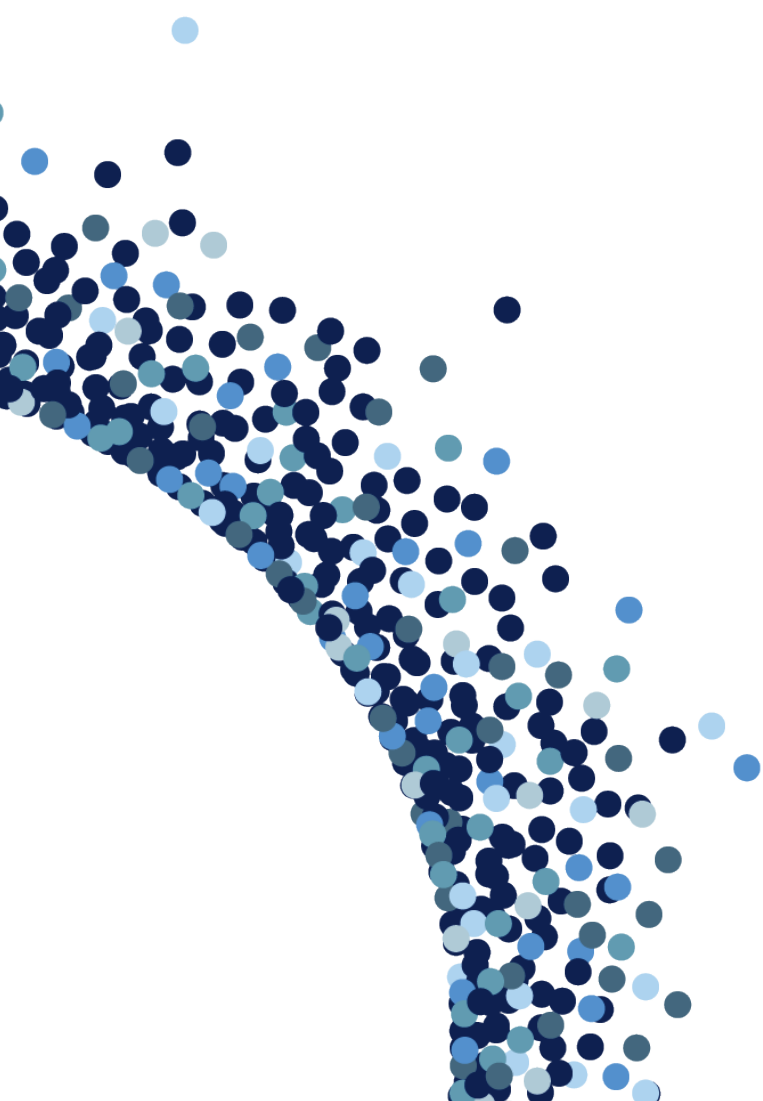




BRIEFING

Net migration to the UK



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This briefing covers the scale of immigration and net migration in the UK since the early 2000s and under the post-Brexit immigration system.

Key Points

The UK has experienced broadly similar levels of migration compared to other high-income countries, on average, over the past few decades.

Net migration was unusually high in the year ending June 2024, at 728,000, driven by an increase in non-EU citizens coming to the UK. The majority of the increase in non-EU arrivals from 2019 to the year ending June 2024 occurred through the work and study routes, with health and care the main industry driving the growth in work migration.

Net migration is expected to fall from current levels in 2025 onwards, although the future outlook is highly uncertain. Visa policy changes introduced in early 2024 are expected to reduce immigration, while the emigration of international students has been rising.

EU citizens made up a majority of immigration and net migration in the run-up to the 2016 EU referendum. Since 2021, however, EU net migration has been negative, according to official estimates. In the year ending June 2024, for example, it was -95,000.

Projections of future net migration are inherently uncertain. In the past 20 years, official projections have usually underestimated future net migration levels.

Understanding the policy

The scale of UK migration is affected by immigration policies but also depends on other factors such as the state of the economy here and in countries of origin, demand for international study opportunities, and events and crises around the world. Immigration policies tend not to specify the total number of people who can move to a country, but simply set eligibility criteria to determine who can qualify for residence. The number of people who meet the criteria will fluctuate over time even when policy does not change. This is one reason it is difficult for politicians to specify exactly what level of net migration they expect in future.

During some periods, specific numerical targets in immigration policy have been in place, however. In particular, the Conservative-led UK governments from 2010 to 2019 had explicit targets to reduce net migration – immigration minus emigration – to under 100,000 a year. In the early 2010s, several policies were introduced to help achieve this target. A brief outline of key policies introduced before the EU referendum can be found in the Migration Observatory commentary, [The State of the Nation: the Immigration Numbers Game](#). The net migration target was never reached, and was abandoned at the end of 2019 under Boris Johnson's government.

In January 2021, a new immigration system was introduced to replace free movement. Under the new system, EU citizens migrating to the UK have been subject to the same immigration rules as citizens from the rest of the world (though Irish citizens continue to have free movement rights under separate legal arrangements). An annual cap on skilled workers was also removed. Overall, the new immigration system is considerably more restrictive towards EU citizens and somewhat less restrictive towards non-EU citizens, compared to the system that existed until the end of the post-Brexit transition period in December 2020. [Projections made](#) before this system came into force suggested that it would reduce overall migration, compared to a system in which free movement had continued. These projections did not account other factors that affect migration trends, such as the war in Ukraine and the establishment of a route for Hong Kong British National Overseas (BNO) status holders; and they did not anticipate the substantial increase in demand for migrant workers in the health and care sector post-Brexit. For a discussion of the points-based system, see our [Policy Primer: The UK's 2021 points-based immigration system](#).

In November 2023, the Home Office [announced](#) a suite of policies designed to restrict immigration via several regular routes—including work, study and family—with a view to reducing net migration.

Understanding the evidence

Broadly speaking, there are three main measures of the scale of migration to the UK:

- *Long-term immigration*: includes anyone moving to the UK for at least 12 months. This measure is useful because it excludes very short-term migrants such as those who come on work visas for just a few weeks or months.
- *Net migration*: is calculated as long-term immigration minus long-term emigration (i.e. those moving for at least a year in either direction). It shows the contribution of migration to population growth.
- *Visa grants*: include anyone receiving a visa to live or work in the UK, including those who move for very short periods (although we exclude visitor and transit visas from all the data in this briefing). Visa data only cover people who require visas, which means that before the end of 2020, EU citizens were not included in the figures. This means they can only be used to look at changes in migration since the pre-Brexit or pre-pandemic period for non-EU citizens.

The Office for National Statistics (ONS) have produced different estimates of both long-term immigration and net migration, using different data and methods. In this briefing we provide the overall story told by looking at the different data sources together. The four main methods are as follows:

Experimental estimates using administrative records

ONS has recently developed new methods of measuring migration using administrative data. These include tax and benefits records contained in the Registration and Population Interaction Database (RAPID) and Home Office data on visas granted and entries and exits at the border. These data sources have the potential to improve migration statistics but are not yet labelled National Statistics as they have important limitations.

For non-EU citizens, recent ONS estimates rely on border data. Non-EU citizens who receive entry visas, enter the UK, and remain for at least 12 months, excluding short trips abroad, are counted as long-term immigrants. Those who leave for at least 12 months are counted as long-term emigrants. For estimates based on the most recent data, ONS cannot yet confirm whether people who leave do so for at least 12 months. As a result, it must make assumptions about how long people will stay. These may not be accurate when behavior is changing, for example due to policy changes. This is why provisional estimates can be substantially revised over time.

Exit checks data currently only meaningfully cover non-EU citizens, although this will change over time as more EU citizens moving to and from the UK are incorporated into the visa system (rather than, for example, the EU Settlement Scheme). Estimates of EU citizens thus currently rely much more on RAPID. Understanding immigration and emigration using the RAPID database requires assumptions about whether people absent from the data have actually left the UK. These assumptions will affect the estimates. The RAPID data will not include people who do not work or receive benefits. Children and students are not counted in the RAPID data either, but in recent migration estimates ONS has made an adjustment to include them. People are classified as migrants in the RAPID database if they were a non-UK citizen when they applied for a national insurance number (NINo). Note that for consistency with other data sources and ONS practices, we describe the data as being for the period “year ending March”, although in practice the figures actually end with the fiscal year on 6th April.

Experimental ONS estimates also include asylum applicants and resettled refugees. Arrivals are estimated using internal Home Office data on the asylum applications and grants of status for resettlement, with an adjustment made to avoid the double counting of those who applied for asylum after entering the country on a long-term visa. The number of departures is sourced from Home Office data on voluntary and enforced returns of asylum seekers. This category does not include immigration or emigration of people who arrive through irregular routes and never go on to claim asylum, because their numbers are not known.

Immigration and net migration figures based on the International Passenger Survey (IPS)

The main source for immigration and net migration data before the COVID-19 pandemic was the IPS, which had many flaws and limitations but provided a long-term view of changes in migration patterns over periods of more than a decade. The survey, conducted at ports and airports, was based on respondents’ *intention* to come to or leave the UK for at least one year. Intentions may not be accurate. Indeed, in August 2019, ONS announced that its Migration Statistics Quarterly Report was being reclassified from *National Statistics* status to *Experimental Statistics*, to convey a lower degree of reliability. This move followed analysis showing that certain groups, such as non-EU students and Eastern European immigrants, were not being measured accurately.

In March 2020, the IPS was suspended due to the COVID-19 pandemic. Although it was later reinstated, it no longer includes the ‘migrant boost’ module that had previously enabled estimates of immigration and net migration. This has further reduced its reliability. ONS no longer publishes migration estimates based solely on the IPS, although the survey is still used to measure migration of British citizens.

British citizens in the data

Finally, note that headline net migration statistics often include the net migration of British citizens. British citizens have traditionally had negative net migration, i.e. more of them leave than arrive in any given year. Including them in the estimates is useful in some circumstances, for example to calculate the overall contribution of international mobility to population growth. However, British emigration is generally not very relevant to policy discussions. This briefing provides figures both including and excluding UK citizens.

The UK has experienced broadly similar levels of migration compared to other high-income countries, on average over the past few decades

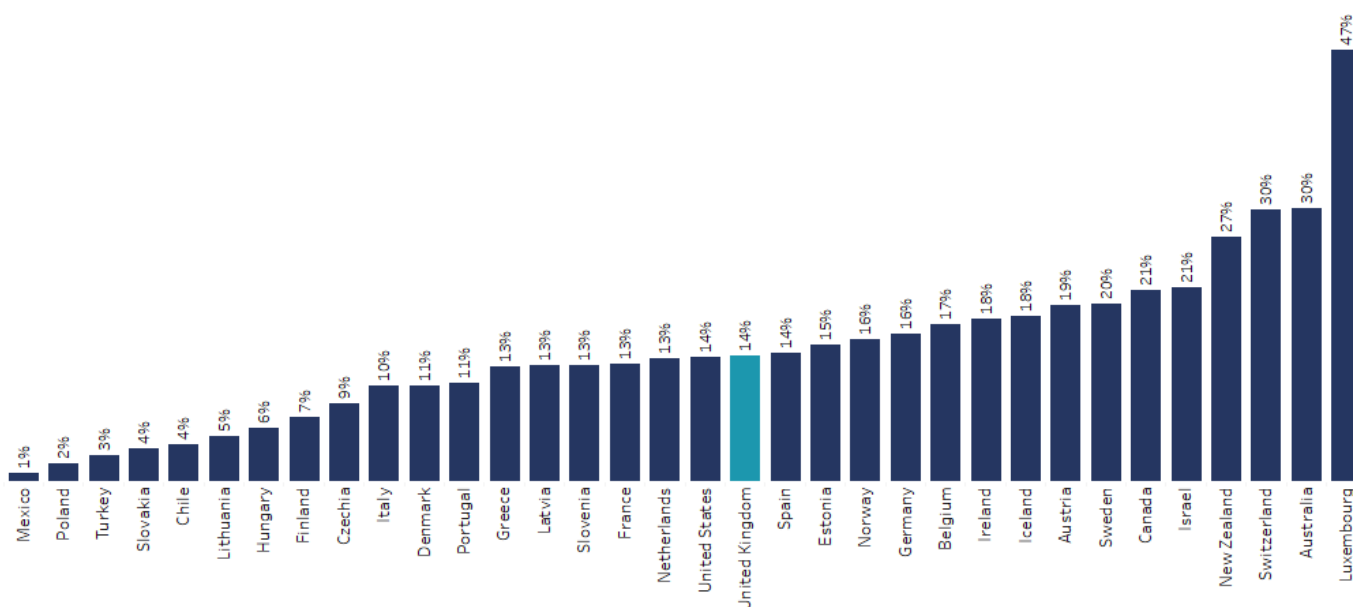
Migration levels fluctuate from year to year, but over long periods, a useful measure of how much immigration a country has experienced is the size of the foreign-born population as a percentage of the population. Countries with high levels of net migration—defined as people immigrating minus those emigrating—develop larger foreign-born or migrant populations over the long run.

By the beginning of the 2020s, the UK’s foreign-born population was approximately 14%. This share is similar to high-income countries such as the United States and Spain (Figure 1). The UK has a smaller foreign-born population than Australia, Canada, and New Zealand. The foreign-born population in Australia, for example, is roughly double that of the UK as a share of the population. By contrast, the UK has a higher share of foreign-born people in the population compared to Italy, Portugal, and most Eastern European countries.

Figure 1

Foreign-born population as share of total population

OECD countries, in 2019 or latest date available



Source: Migration Observatory analysis of OECD, International Migration Database.

Note: OECD estimates are provided to OECD by the governments of particular countries, and may have methodological limitations, which have not been scrutinised by the Migration Observatory.



The scale of migration to a country may have some economic impact, but research suggests that for many economic impacts, the composition of migration is more important than the numbers alone. Whether migrants are working and what skills and qualifications they bring are among the key factors that affect the effects of migration on public finances and productivity, for example (MAC, 2018). For more discussion of the economic impacts of migration, see the Migration Observatory briefings, [The Fiscal Impacts of Immigration in the UK](#), and [The Labour Market Effects of Immigration](#).

Net migration was unusually high in the year ending June 2024, driven primarily by high demand for workers in the health and care sector and an increase in international student numbers

Net migration is a commonly used measure of the overall scale of migration in the UK. It takes into account not just people moving to the country, but also those leaving. This helps understand migration’s contribution to population growth—especially since many people who move to the UK do not remain here permanently. However, the net migration measure also has flaws. For example, it tells us little about who is arriving and leaving or what their impacts are. It can also produce counterintuitive or misleading figures when migration patterns change substantially in a short period, as discussed further below. The UK is [unusual in its choice](#) to use net migration in policy debates as the main measure for discussing migration levels.

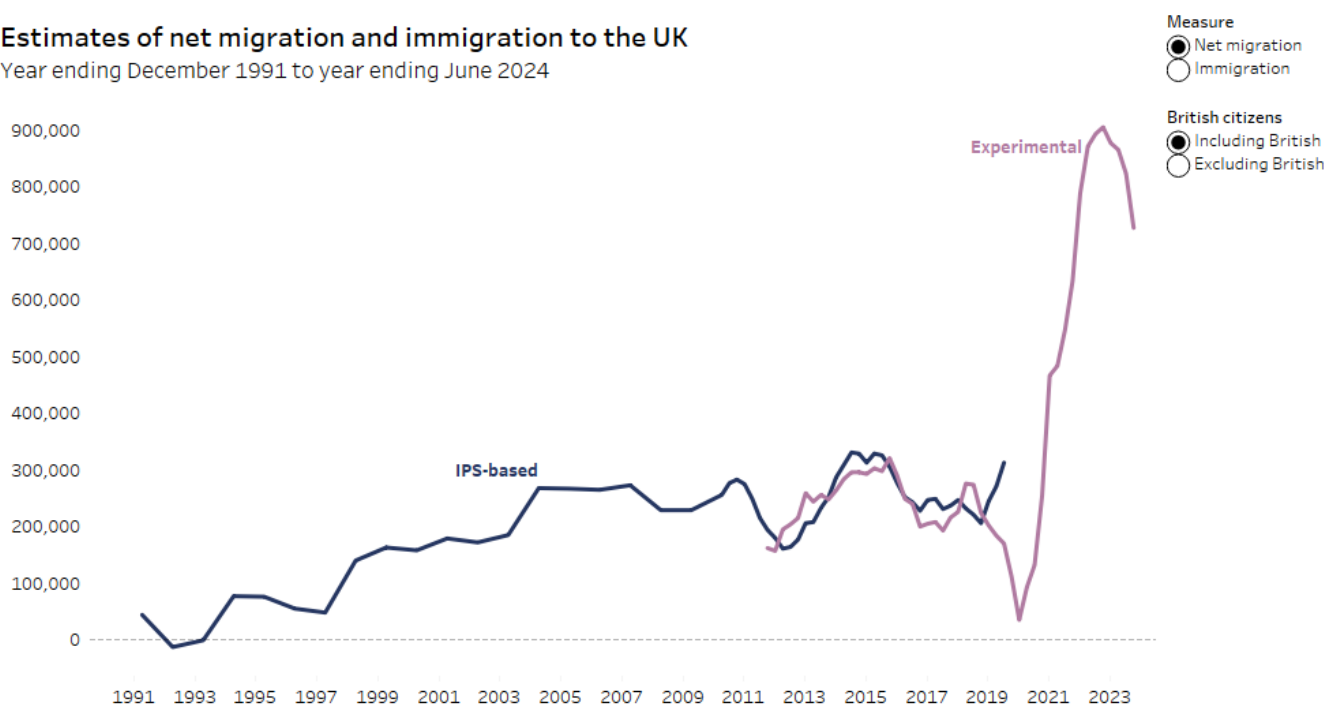
Official net migration estimates are currently very uncertain and published figures will be revised. For example, ONS has revised the estimate of net migration for 2023 upwards by 26%, or 181,000, since it was first published. (For more detail, see the Evidence Gaps and Limitations section, below.)

With this caveat in mind, estimates from the Office for National Statistics suggest that total net migration was 728,000 in the year ending June 2024. This was substantially above pre-pandemic estimates of between 200,000 and 300,000 (depending on which measure is used) (Figure 2).

Figure 2

Estimates of net migration and immigration to the UK

Year ending December 1991 to year ending June 2024



Source: IPS-based: for 1991 to 2009: ONS, Table 2.00: Long-term international migration time series; and for YE Dec 2010 to YE Mar 2020: ONS, provisional estimates of long-term international migration, year ending March 2020. Experimental estimates: ONS, Long-term international migration, provisional: YE June 2012 to YE June 2023, Table 1.

Note: Both IPS and experimental estimates come with substantial uncertainty.



The rise in overall net migration was driven by an increase in non-EU citizens coming to the UK. Non-EU net migration gradually increased during the 2010s, reaching around 190,000 in 2019. It fell briefly in 2020 due to the pandemic but has since risen sharply. In the year ending June 2024, non-EU net migration was 845,000, below its peak but well above historical levels.

ONS estimates show two main explanations for the 665,000 increase in non-EU immigration that took place between 2019 and the year ending June 2024 (Figure 3):

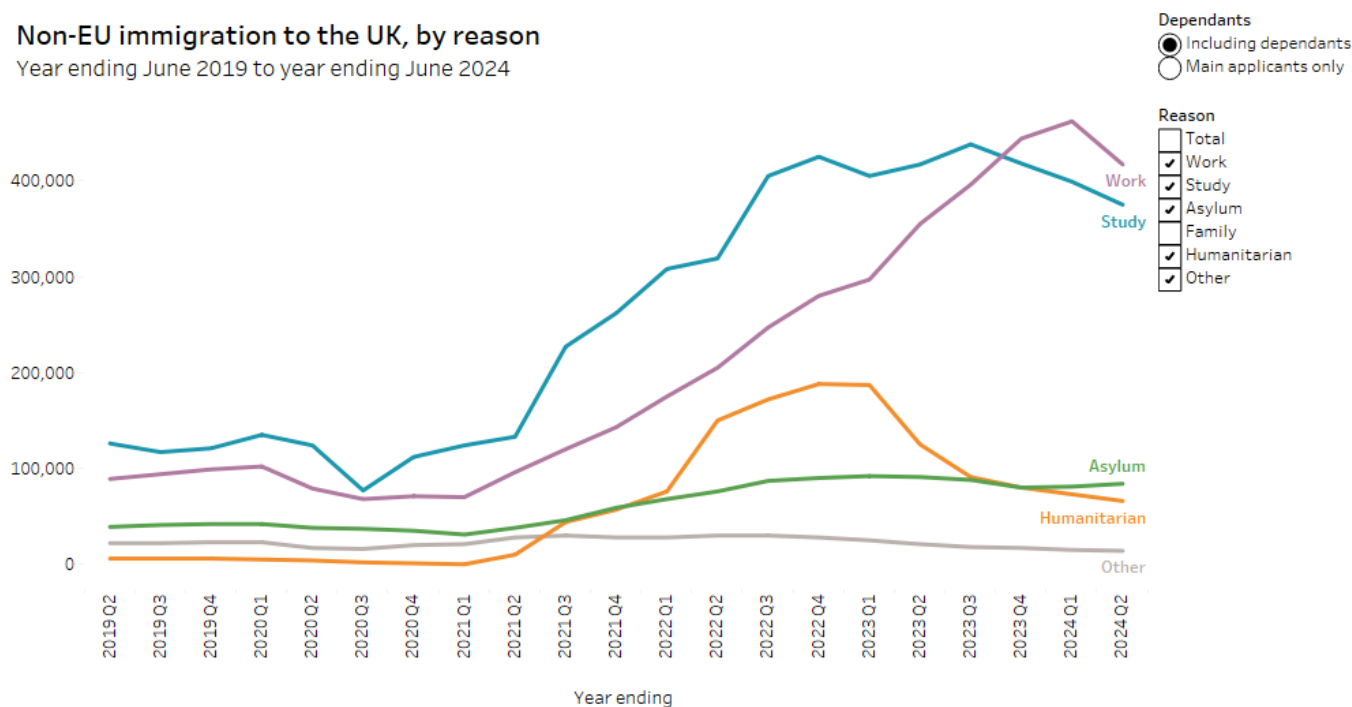
- Work visas. Almost half of the increase in non-EU immigration from 2019 to the year ending June 2024 resulted from those arriving for work purposes (18%) and their dependants (29%). Health and care was the main industry driving the growth, including care workers who received access to the immigration system in February 2022. There was also higher demand for some workers who were already eligible for visas under the old system, such as doctors and nurses.
- International students and their dependants accounted for a further 38% of the increase in non-EU immigration. UK universities started to recruit students overseas [more actively](#) as their financial situation deteriorated, and it is also likely that the reintroduction of post-study work rights post-Brexit made the UK more attractive to international students.

Home Office data indicate that significantly fewer visas were granted to [health and care workers](#) and [students' family members](#) between January and September 2024, compared to the same period in 2023. These declines followed the introduction of restrictions on students' family members and a Home Office move to scrutinise applications to sponsor migrant care workers, in light of widespread reports of exploitation in the care sector. However, because these changes were made in 2024, they are not fully reflected in the most recent net migration estimates. More information on the drivers of work and student migration is available in the Migration Observatory briefings, [Work visas and migrant workers in the UK](#) and [Student migration to the UK](#).

Figure 3

Non-EU immigration to the UK, by reason

Year ending June 2019 to year ending June 2024



Source: ONS, Long-term international migration, provisional: YE June 2012 to YE June 2024, Table 4.

Note: Figures are experimental and rely on ONS assumptions. 'Humanitarian' comprises arrivals under bespoke routes for Ukrainians and Hong Kong British Nationals (Overseas) status holders, as well as other small humanitarian routes.



Indian nationals were by far the largest nationality coming to the UK in the year ending June 2024, accounting for 20% of overall immigration, followed by Nigerian and Pakistani citizens (10% and 8% respectively). In 2022, [Ukrainians](#) were also a common nationality following the introduction of humanitarian visa routes in response to the war in Ukraine. However, their share of overall arrivals declined from 2023.

Rising emigration may put downward pressure on net migration from 2025 onwards

Net migration at the levels seen between 2021 and the year ending June 2024 cannot be assumed to be a ‘new normal’. The future outlook for immigration is necessarily uncertain. In early 2024, the government [implemented](#) various measures designed to reduce migration, particularly by family members of international students and [care workers](#). Home Office data for [January to October 2024](#) showed a decline in visa applications from some of the groups affected. However, at the time of writing, it was unclear to what extent the fall is due to policy changes, or how it would affect official estimates of net migration.

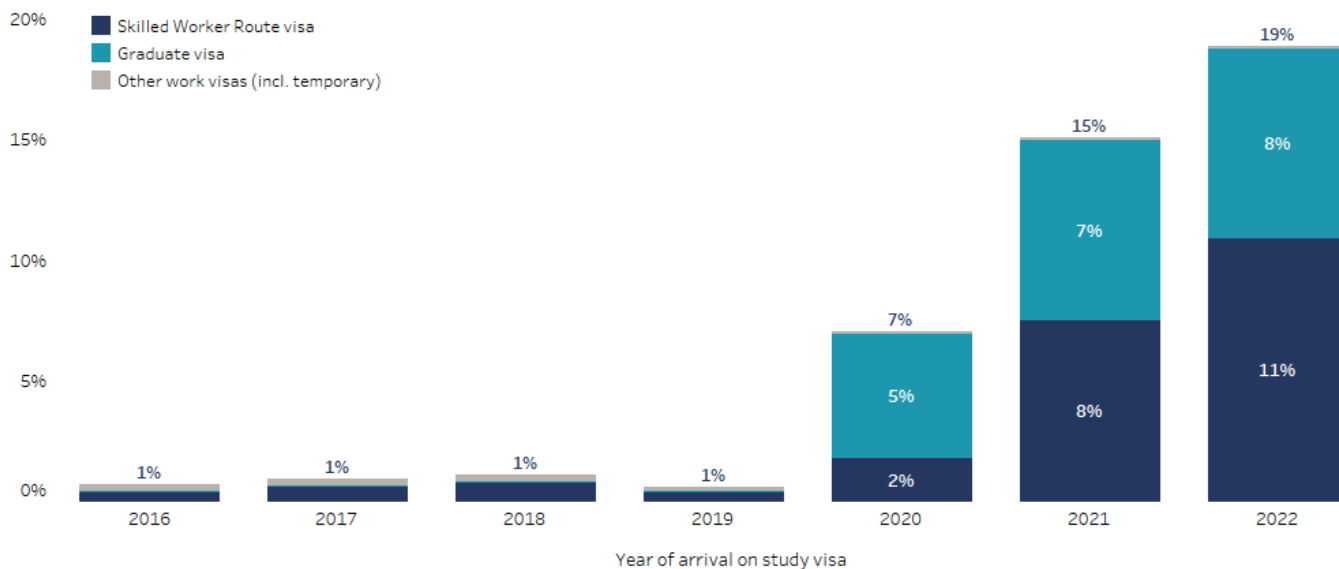
In addition, many non-EU citizens—and particularly international students—have in the past come to the UK for periods of a few years, before emigrating again. Among non-EU citizens with visas granted in 2008, for example, 83% saw their visas expire by the end of the seventh year after arrival. Recent increases in study migration are thus expected to lead to temporarily estimates of net migration for at least 2–3 years, before emigration catches up. This is already reflected in student migration patterns since the pandemic—the estimated number of students emigrating in 2023 was around double that in 2021 (113,000 compared to 55,000). For a further discussion, see the Migration Observatory report, [Why are the latest net migration figures not a reliable guide to future trends?](#)

There is some evidence that international students have become more likely to remain in the UK long term, however (Figure 4). This is not just because of the Graduate visa, but because more students are switching into long-term Skilled Worker Route visas too. If this trend continues, we may not see as much of an increase in student emigration (and thus less of a decrease in net migration) than otherwise expected. For more information, see the Migration Observatory commentary, [International students entering the UK labour market](#).

Figure 4

Share of former non-EU students switching to work visas by the end of the first year after arrival

By calendar year of arrival on study visa



Select view From 2016, by visa category

Source: Migration Observatory analysis of Migrant Journey 2023, Table MJ_D01.

Note: Figures denote share of entire cohort, including those still on study visas, and include dependants. "From 2004" view includes a small number of former international students who transitioned to temporary work visas.



Even if a majority of students and workers eventually leave the country, those who remain do of course contribute to net migration in the long term and not just the short term. For example, if 500,000 sponsored students arrived in a given year and 20% remained permanently, that annual cohort would contribute 100,000 to net migration over the long term.

Students' temporary stays have previously [generated debate](#) about whether they should be included in net migration statistics. Net migration data are used to generate population estimates, and since students are part of the population, removing them from the UK's main net migration figures would make population estimates less accurate. Other countries [routinely include students](#) in their net migration statistics, including Australia, Canada, the United States and New Zealand. One difference between the UK and other countries is that UK policy debates focus more on net migration (and thus are more affected by idiosyncrasies of the net migration measure), while debate in other countries tends to focus on immigration and grants of temporary or permanent status.

Net migration of EU citizens was negative in the year ending June 2024

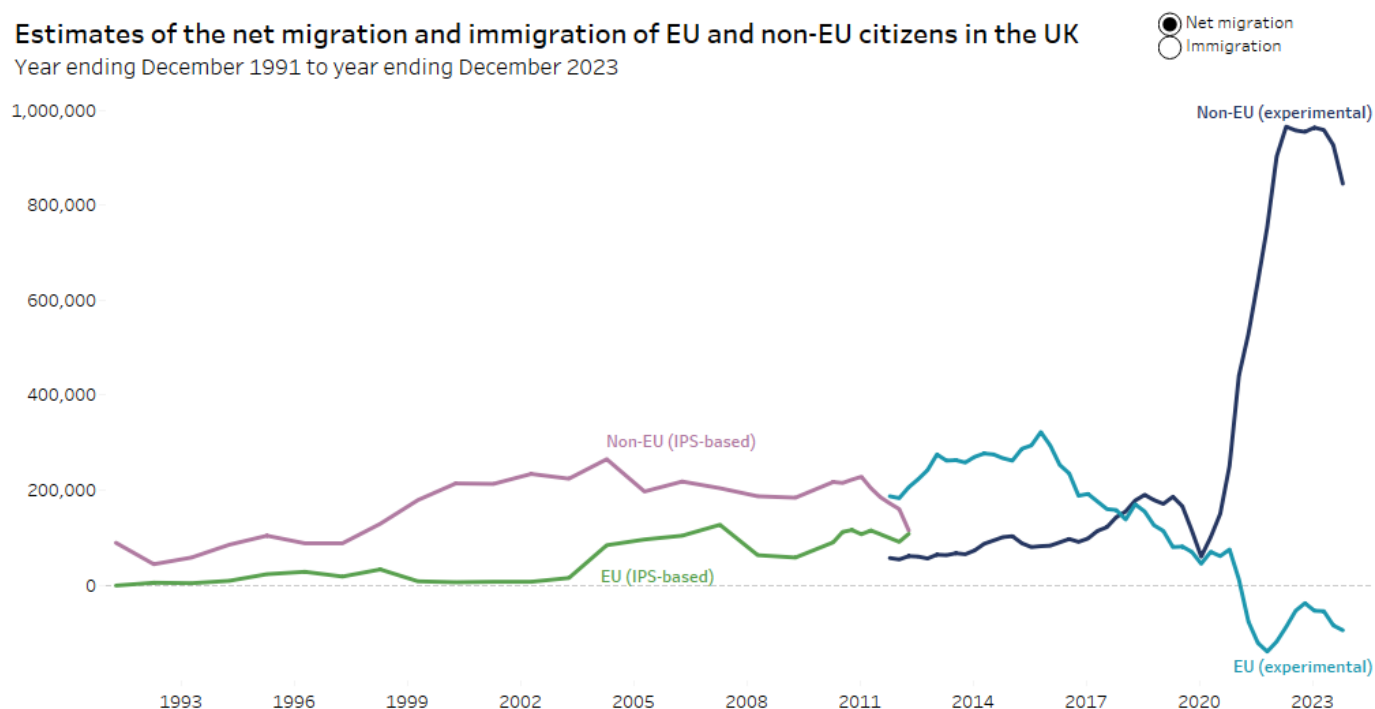
Shortly before the 2016 referendum on EU membership, EU citizens made up the majority of all net migration to the UK (excluding British citizens). Depending on the data source used, EU citizens contributed between 59% and 77% of estimated net migration in the year ending March 2015. This high share was unusual by historical standards, and [partly resulted from temporary factors](#): Romanian and Bulgarian citizens receiving full access to the UK labour market in 2014, and migration from Southern European countries where youth unemployment was high due to the Eurozone crisis.

Since the 2016 referendum, the picture has changed (Figure 5). Although policy towards EU citizens did not change until January 2021, EU net migration began to fall immediately after the referendum. Possible explanations for this decline include the economic recovery in southern European countries following the Eurozone crisis; the decline in the value of the pound after the referendum, which made work in the UK less attractive; and uncertainty about the political climate. The decline in the EU *share* also resulted from rising non-EU migration during the same period.

Figure 5

Estimates of the net migration and immigration of EU and non-EU citizens in the UK

Year ending December 1991 to year ending December 2023



Source: IPS-based: for 1991 to 2010: ONS, Table 2.00: Long-term international migration time series; and for 2010 to 2012: ONS, provisional estimates of long-term international migration, year ending March 2020, Table 1. Experimental estimates: ONS, Long-term international migration, provisional: YE June 2012 to YE June 2024, Table 1.

Note: Both IPS and experimental estimates come with substantial uncertainty.



Despite earlier analysis suggesting that EU net migration was negative during the pandemic (i.e. that there was net *emigration*), revised ONS experimental estimates indicated that EU net migration remained positive in the 2020 calendar year. It estimated that emigration of EU citizens only turned negative with the introduction of the post-Brexit immigration system in 2021, which greatly reduced opportunities for EU citizens to move to the UK. Take-up of work visas among EU citizens in the post-Brexit immigration system in 2021 and 2022 was relatively low, as explained in the Migration Observatory briefing, [Work visas and migrant workers in the UK](#).

Net migration of EU citizens in the year ending June 2024 was -95,000, according to experimental ONS estimates. More detail on how EU net migration has changed following the Brexit referendum and COVID-19 pandemic can be found in the Migration Observatory briefing [EU Migration to and from the UK](#), and the impacts of lower EU net migration in the labour market are discussed in the Migration Observatory report, [How is the End of Free Movement Affecting the Low-Wage Labour Force in the UK?](#)

Projections of future net migration are inherently uncertain

The estimate of 872,000 net migration in 2022 contrasts with lower official projections of future net migration. ONS produces population projections that are used for planning services and making public finance forecasts, among other things. This requires assumptions about future net migration. Making these assumptions is difficult because migration patterns depend on so many different factors both within and beyond government policy. ONS assumptions typically have not taken into account migration policy announcements or political intentions, but instead are [based on](#) historical migration and consultations with academic experts.

In its most recent [population projections](#), produced in early 2024 and based on 2021 data, ONS assumed that net migration would fall to an average long-term level of 315,000 by 2028. The fact that net migration in 2022 was an estimated 872,000 does not mean that this projection is ‘wrong,’ since the projection is for long-term migration after 2028 when some of the factors that have increased net migration recently may no longer be present.

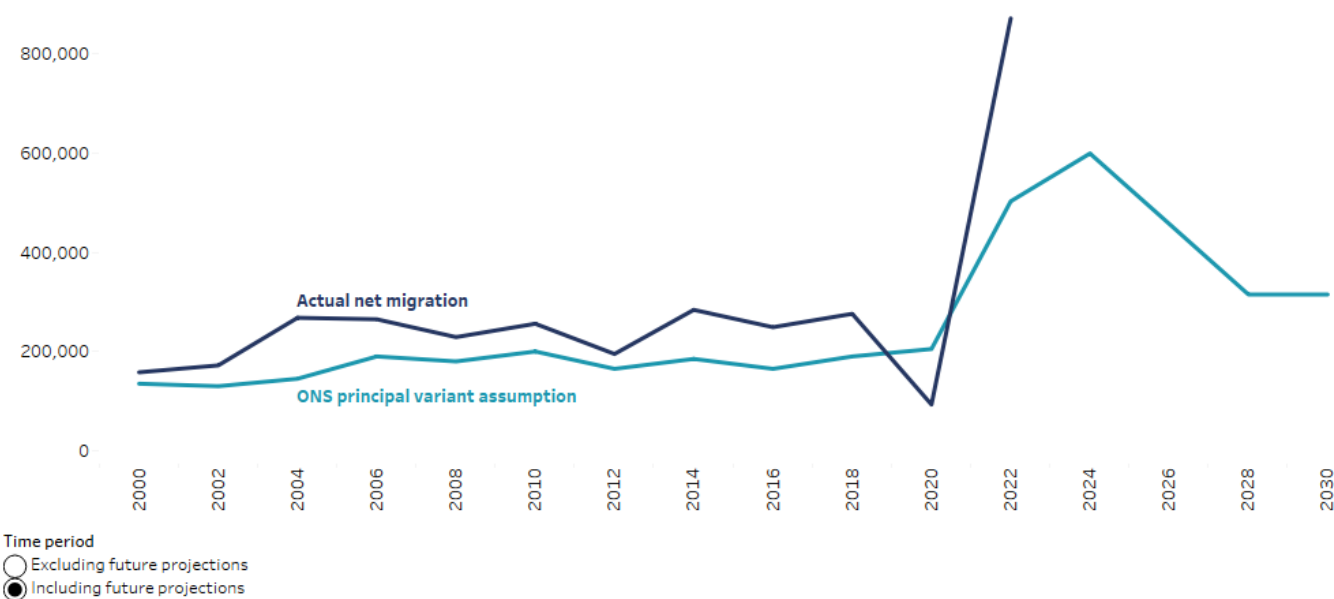
Nonetheless, net migration assumptions contained in population projections over the past twenty years have usually undershot. Figure 6 shows the ONS migration assumption used in its principal population projection compared to official estimates of net migration in the same year. In most years, actual net migration has been higher than the projection based on data for the same year, which means that the projections assumed net migration would decline in future. In practice, net migration has fluctuated up and down, but usually remained higher than projected. For example, net migration was an estimated 229,000 in 2008. The 2008-based population projections assumed that net migration would fall to 180,000 within a few years, but it remained persistently above 180,000, with a brief exception in 2012. Another exceptional year was 2020, when the COVID-19 pandemic unexpectedly reduced net migration. For a further discussion of ONS population projections, see the Migration Observatory briefing, [The Impact of Migration on UK Population Growth](#).

Modelling of future net migration levels by Migration Observatory and London School of Economics suggests that the ONS central assumption may still be too low, even after increasing the central scenario to 315,000. To find out more, see the Migration Observatory report, [Why are the latest net migration figures not a reliable guide to future trends?](#)

Figure 6

Projected vs. actual net migration in the UK

Projected from 2000 to 2030; actual net migration from 2000 to 2022



Source: Migration Observatory analysis of ONS Population Projections; Migration Statistics Quarterly Reports; and ONS (2023).

Note: ONS principal variant figures from 2000 to 2022 are for the base year of the projections, e.g. 2016 refers to the 2016-based projections, published in 2017. Projections from 2024 to 2030 refer to 2021-based projections. Net migration figures use IPS-based figures until 2010, and experimental figures from 2012 onwards.



Evidence gaps and limitations

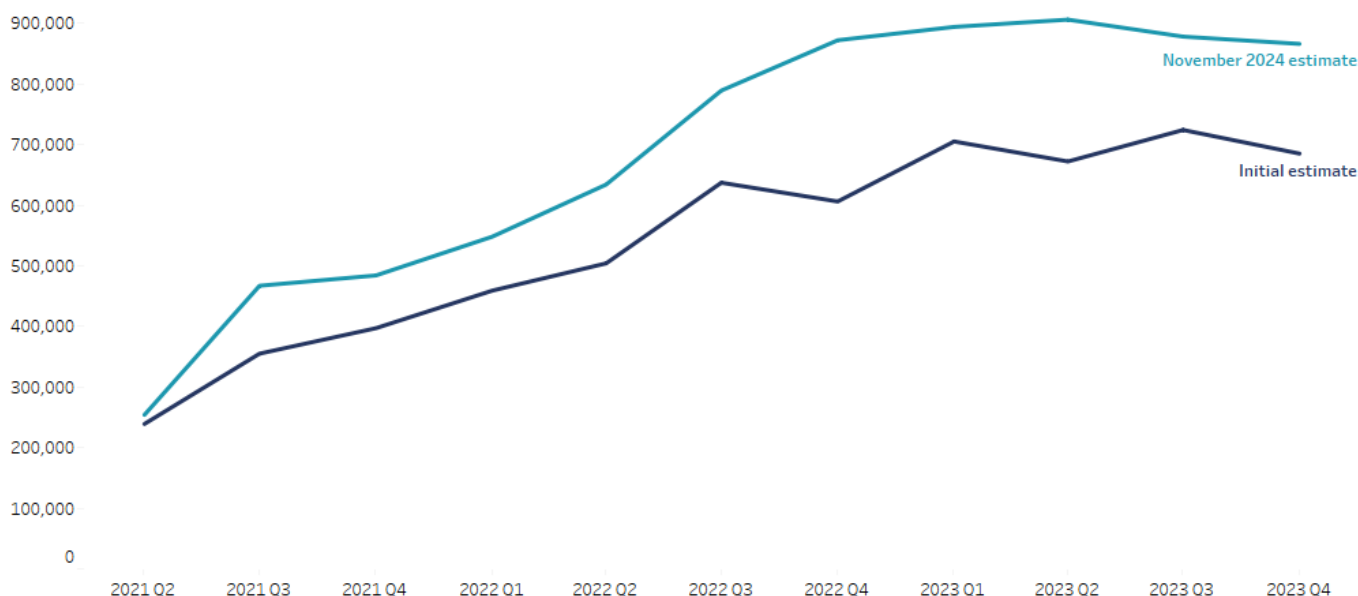
When producing the most recent year of data, ONS relies on assumptions about future travel patterns that are necessarily uncertain. As a result, provisional estimates are sometimes revised substantially. In particular, ONS must make assumptions about the share of people granted long-term visas who will not remain in the UK for the full duration of their visa, but migration behaviours have changed following the introduction of the post-Brexit immigration system. ONS thus faces a trade-off between timeliness and accuracy of its provisional statistics.

The November 2024 publication that produced migration estimates for the year ending June 2024 also [provided revised estimates](#) for previous years using more complete travel data. Due to both changing mobility patterns and one-off factors – including improvements in the methods and data used – the revised November 2024 estimate for the year ending June 2023 was 234,000 (or 35%) higher than the initial estimate from the November 2023 publication (Figure 7).

Figure 7

Initial vs. revised net migration estimates

Year ending June 2021 to year ending December 2023



Source: ONS, Long-term international migration, provisional.

Note: The November 2024 estimates for net migration in the year ending September 2023 and December 2023 are provisional. All estimates come with substantial uncertainty.



The migration of British Nationals Overseas (BNO) status holders has also created statistical difficulties because some of them appear to have been counted as British Nationals in the International Passenger Survey, which is used to estimate net migration of UK citizens. People who enter the UK without permission (e.g. in [small boats](#)) are included in the statistics if they claim asylum, but irregular migrants who do not claim asylum will not be included.

Estimates of EU citizen migration come from the RAPID tax and benefits database, which is not designed to measure migration flows. In the year ending June 2024 estimates, both immigration and emigration of EU citizens are relatively high at 116,000 and 211,000, respectively. The EU immigration estimate is much higher than the number of visas granted to EU citizens (51,000 in the year ending June 2024, excluding visitors, transit and frontier workers who do not live in the UK). ONS analysis suggests that most of the EU citizens migrating to the UK during this period were not on visas but already held status under the EU Settlement Scheme (EUSS). Full data on the migration of people with EUSS status are not currently published.

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The Migration Observatory

Based at the Centre on Migration, Policy and Society (COMPAS) at the University of Oxford, the Migration Observatory provides independent, authoritative, evidence-based analysis of data on migration and migrants in the UK, to inform media, public and policy debates, and to generate high quality research on international migration and public policy issues. The Observatory's analysis involves experts from a wide range of disciplines and departments at the University of Oxford.



COMPAS

The Migration Observatory is based at the Centre on Migration, Policy and Society (COMPAS) at the University of Oxford. The mission of COMPAS is to conduct high quality research in order to develop theory and knowledge, inform policy-making and public debate, and engage users of research within the field of migration.

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