COMMENTARY

Why has non-EU migration to the UK risen?

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This briefing note examines why there has been an increase in non-EU migration to the UK and what we can expect over the coming years. It concludes that:

- Three factors have come together to make the number of visas granted to non-EU citizens unusually high. The largest single factor is the introduction of visa routes for Ukrainian refugees and Hong Kong British Nationals (Overseas) status holders. Together these two routes contributed 45% of the 467,000 increase in visa grants between 2019 and the year ending June 2022 (excluding visitors and short-term study).
- The rest of the increase results from students (39% of the increase) and work visas (23% of the increase). Skilled workers, particularly in the health and care sectors, were the main factor behind the increase in work visa grants.
- High levels of non-EU visa grants cannot be assumed to be a 'new normal'. The future outlook for visa grants is necessarily uncertain. However, some of the recent contributors to non-EU immigration are not expected to continue indefinitely, such as the arrival of Ukrainian refugees.
- Higher immigration usually leads to higher emigration, because most non-EU citizens on work and study eventually leave the UK. But the expected emigration typically takes 2-3 years to materialise. This means that estimates of net migration may look unusually high over the next couple of years, before emigration catches up.
- Recent immigration patterns are not simply the result of the end of free movement and the introduction of the post-Brexit immigration policy. The Ukraine visa schemes were not part of the policy for replacing free movement, and many of those being recruited into the NHS are nurses and doctors who were already eligible for visas under the previous immigration system. The post-Brexit system is likely to have had some impact on non-EU visa grants, however, for example via the extension of work visas to care workers and seasonal workers; the decision to grant international students post-study work rights may also have played a role.

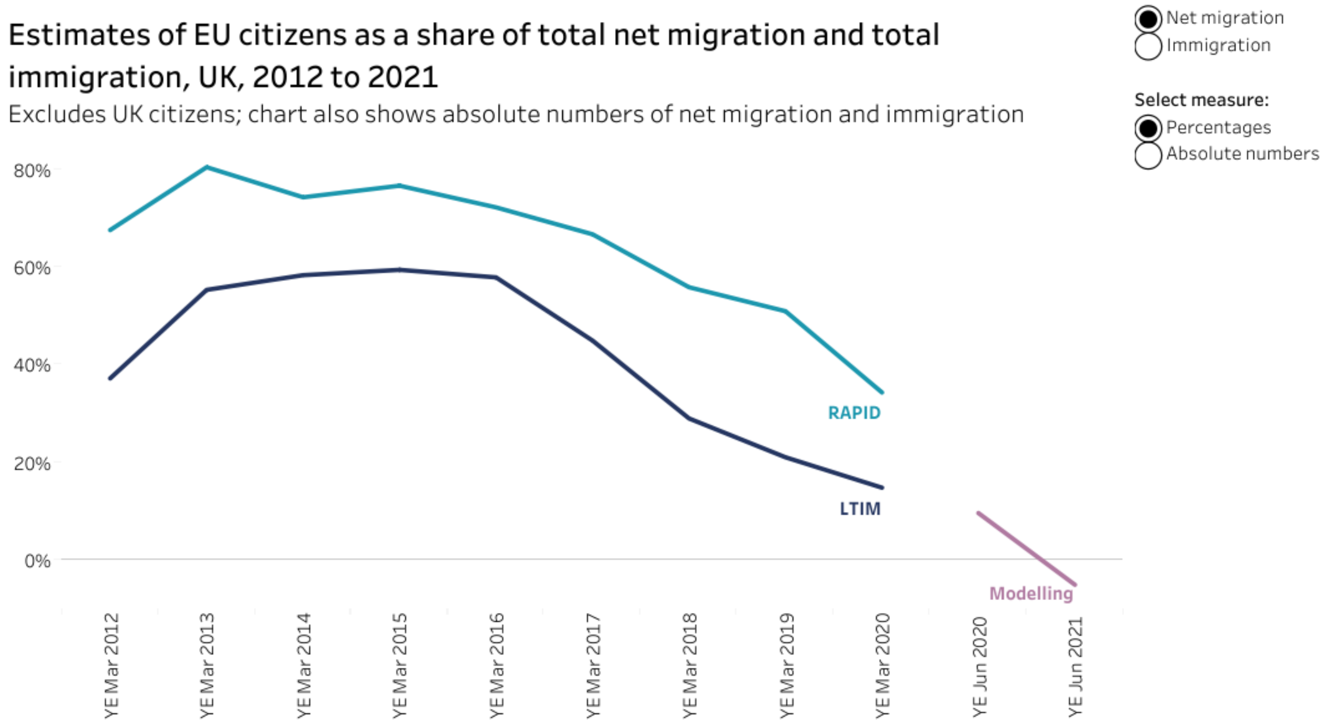
Introduction

Over the past few years, a large shift in the countries of origin of migrants to the UK has taken place. In the mid-2010s, around the time of the Brexit referendum, the Office for National Statistics' (ONS) main data releases suggested that EU citizens made up more than half of total net migration of non-UK citizens (Figure 1 – labelled as 'LTIM'). Experimental figures using administrative data sources (labelled as RAPID in Figure 1) put the share even higher, at around three quarters.

Since that time, however, the picture has changed a lot. EU net migration fell sharply after the referendum, while non-EU net migration increased. The result is that in the most recent ONS estimates, which cover the year ending June 2021, EU citizens made no contribution to net migration at all. Indeed, net migration of EU citizens was slightly negative.

All else equal, this decline in EU migration would be expected to lead to lower overall migration, and this is what modelling conducted before the introduction of the new immigration system consistently predicted. But all else was not equal. Instead, there has been a significant increase in immigration from non-EU countries.

Figure 1



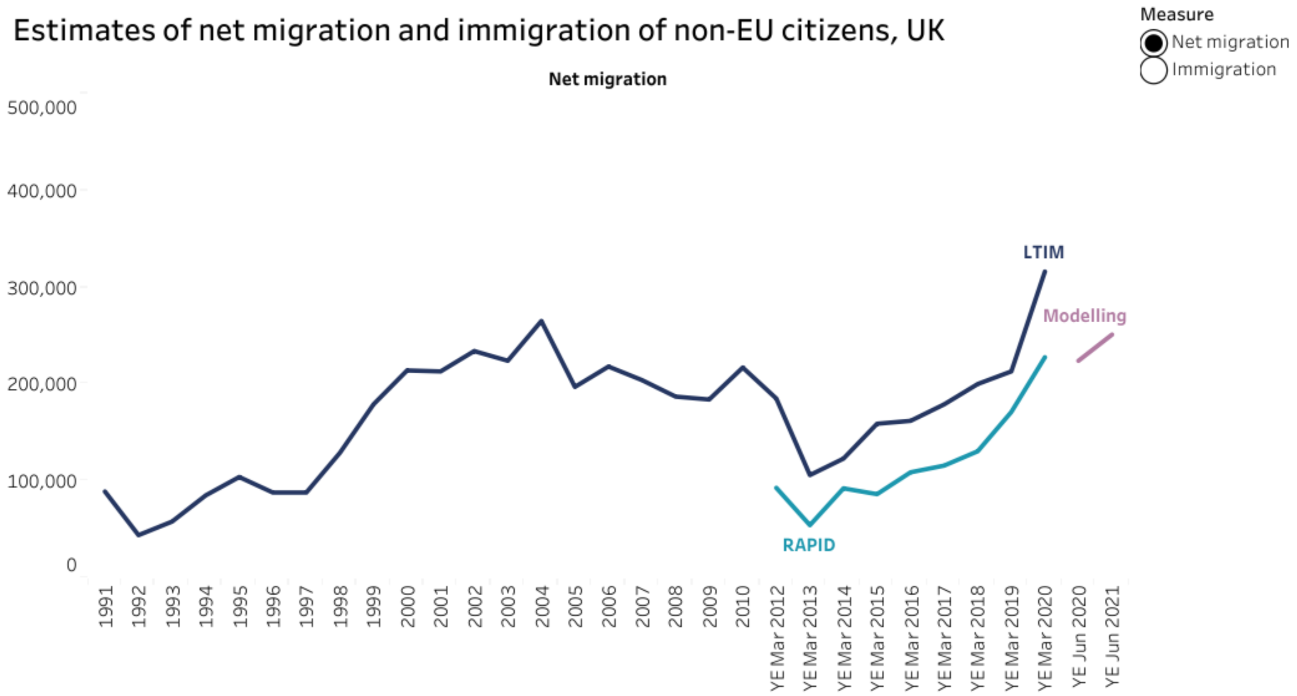
Source: LTIM: for 1991 to 2010: ONS, Table 2.00: Long-term international migration time series; and for YE Mar 2012 to YE Mar 2020: ONS, provisional estimates of long-term international migration, year ending March 2020, Table 1. RAPID: ONS, Long-Term International Migration and estimates from Registration and Population Interactions Dataset (RAPID). Modelled estimates: Long-term international migration, provisional: year ending June 2021. Note: RAPID data are for non-British citizens only. LTIM figures include children but RAPID figures do not. Post-2010 LTIM figures are for years ending 31 March. RAPID estimates are not for years ending 31 March, but for tax years ending 6 April. Both IPS and RAPID estimates come with substantial uncertainty.

What are the trends in non-EU migration?

Immigration statistics have been disrupted by a combination of the Covid-19 pandemic and the transition from one set of methods for measuring migration to another. As a result, migration figures are currently very uncertain and the estimates that have been published so far are likely to be revised in future.

Nonetheless, different data sources consistently show an increase in non-EU migration to the UK since the mid-2010s, interrupted only briefly by the pandemic. In the year ending March 2020, before the pandemic, different estimates put non-EU net migration at 230,000 to 316,000 (Figure 2). After a sharp fall during the first lockdown (not shown in Figure), the most recent estimate of non-EU net migration was around 250,000, for the year ending June 2021.

Figure 2



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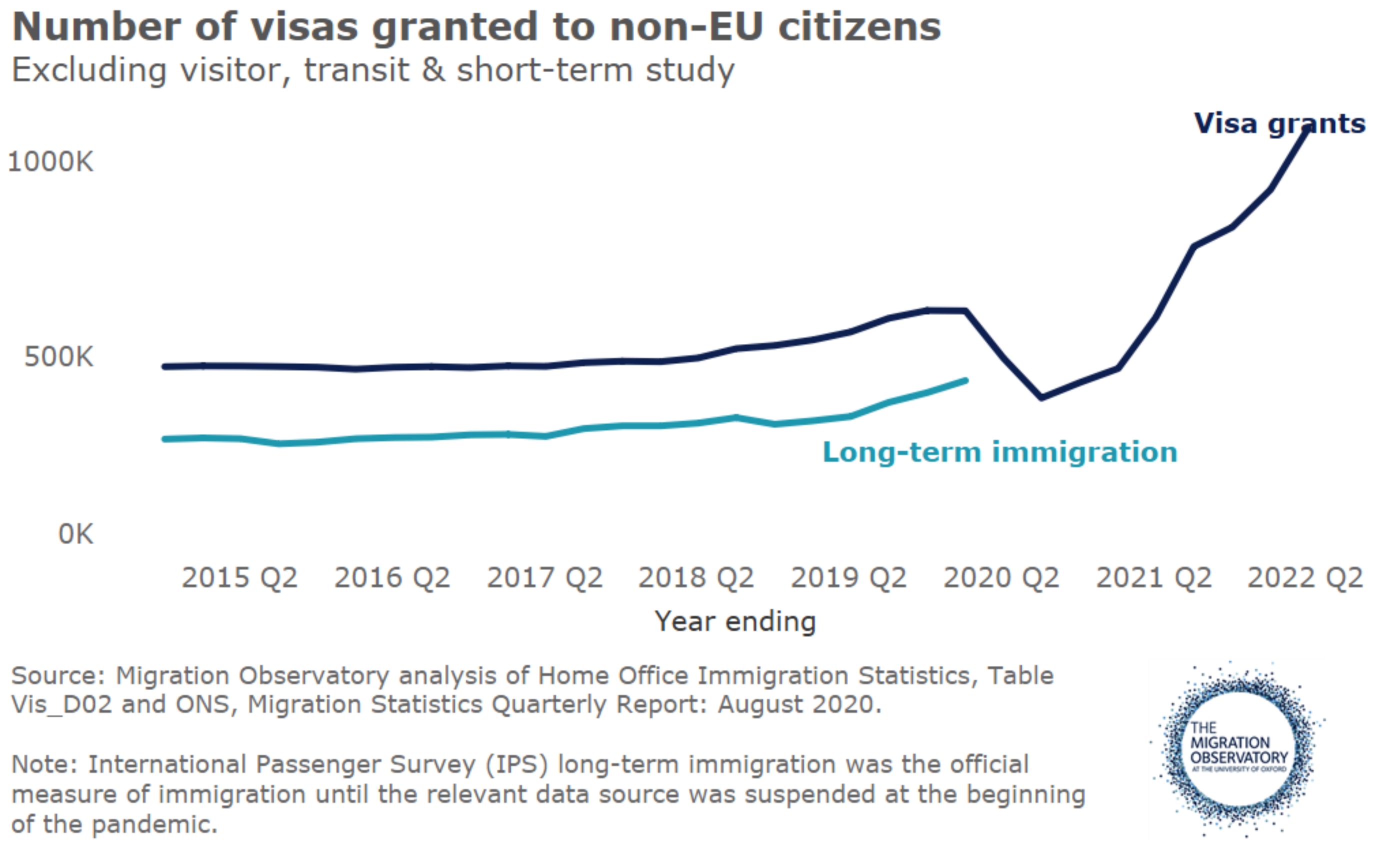
Since then, separate data on the number of visas issued to non-EU citizens suggest that immigration has continued to increase. Visa grants to non-EU citizens are higher than official immigration estimates because some people granted visas never arrive and others come only for short periods and so are not counted as long-term migrants. Before the pandemic, long-term immigration was typically around 50% to 60% of the level of visa grants (Figure 3). For example, ONS analysis shows that about 25-30% of work visa holders with visas expiring in 2019 left the country at least 6 months before their visa expiry date.

The number of visas granted to non-EU citizens (excluding visitors, transit visas and short-term study visas) increased by 467,000 or 76% from 2019 to the year ending June 2022, when it reached 1.08 million (Appendix Table 2). Provisional estimates of long-term immigration for the year ending June 2022 are due to be published by the Office for National Statistics in late November.

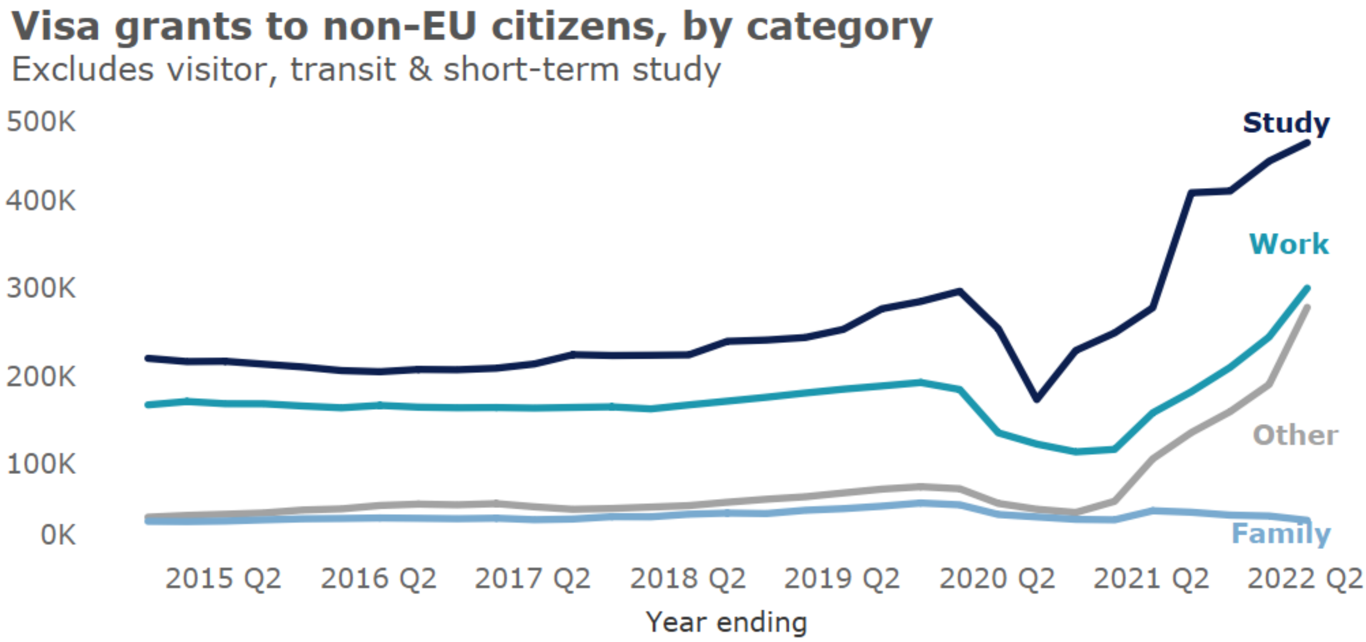
Figure 3



Which types of non-EU migration have driven the overall increase?

By looking at the reasons for visa grants, we can get more insight into the drivers of increased non-EU immigration. When we break down non-EU visa grants into different categories, it becomes clear that there is no single factor driving the overall trend. Increases take place in three main categories: work, study, and 'other'.

Figure 4

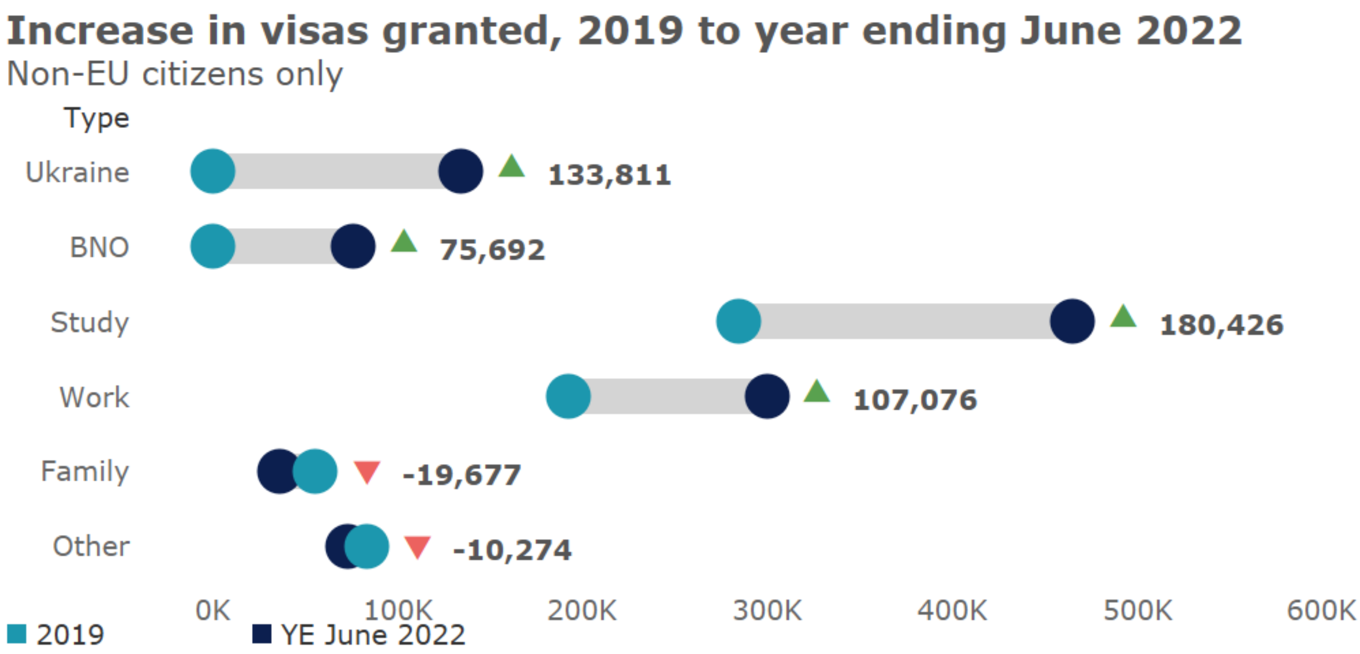


Source: Migration Observatory analysis of Home Office Immigration Statistics, Table Vis_D02.

Note: figures exclude short-term study due to a policy change in December 2020, which gave short-term students visitor visas instead of study visas. Figures also exclude visit and transit visas.

The largest increase in the number of visas granted comes from the category labelled 'other', which includes the Ukraine visa schemes and the Hong Kong British Nationals Overseas (BNO) route. In the year ending June 2022 there were 76,000 BNO visa grants and 134,000 under the Ukraine Family and Sponsorship schemes. Together, these two categories made up 19% of the 1.08m visa grants in the year ending 2022 (Appendix Table 2). They accounted for close to half (45%) of the 467,000 *increase* in visa grants since 2019, when the two schemes in question did not yet exist. The Ukraine schemes accounted for 29% of the increase, and the Hong Kong BNO scheme for 16% (Appendix Table 1 and Figure 5).

Figure 5



Source: Migration Observatory analysis of Home Office Immigration Statistics, Table Vis_D02.

Note: figures exclude short-term study due to a policy change in December 2020, which gave short-term students visitor visas instead of study visas. Figures also exclude visit and transit visas. The 'other' category in this chart includes miscellaneous dependants as well as EUSS family permits and other temporary visas.

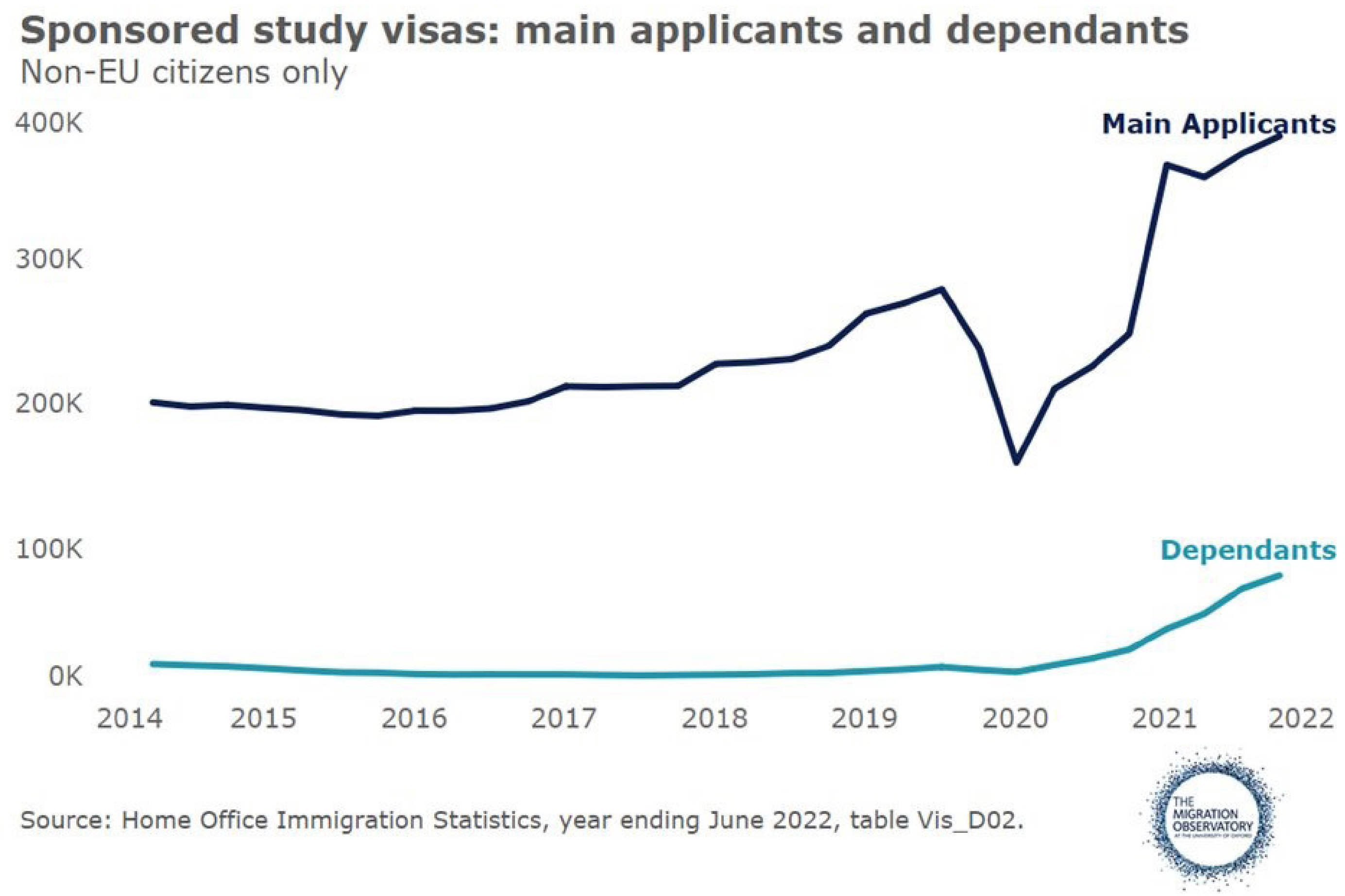
The next largest driver of the increase in visa grants was sponsored students and their family members, who made up 180,000 or 39% of the increase in visa grants. (The calculation excludes short-term students, who received larger numbers of visas in 2019 but are now included within the 'visitor' category.)

Some of the increase in student numbers may be a bounce-back from the pandemic, when some students who had started a UK course studied remotely and did not require a visa until they joined in person. However, the government has also had an explicit strategy of increasing international student recruitment to the UK and diversifying the countries from which students are recruited. India and Nigeria, the two countries that saw the largest increases in the number of student visa grants, were named among the immediate 'priority countries' in the government's strategy. It is also possible that the reintroduction of a post-study work visa (known as the Graduate route) post-Brexit has made the UK more attractive to international students, although disentangling different potential drivers is difficult.

There has also been an increase in family members of students. Of the total 180,000 increase in student visas issued to non-EU citizens, 64% was from main applicants and 36% was from their partners or children receiving student dependant visas.

The Migration Observatory briefing, Student Migration to the UK, provides more background on student migration.

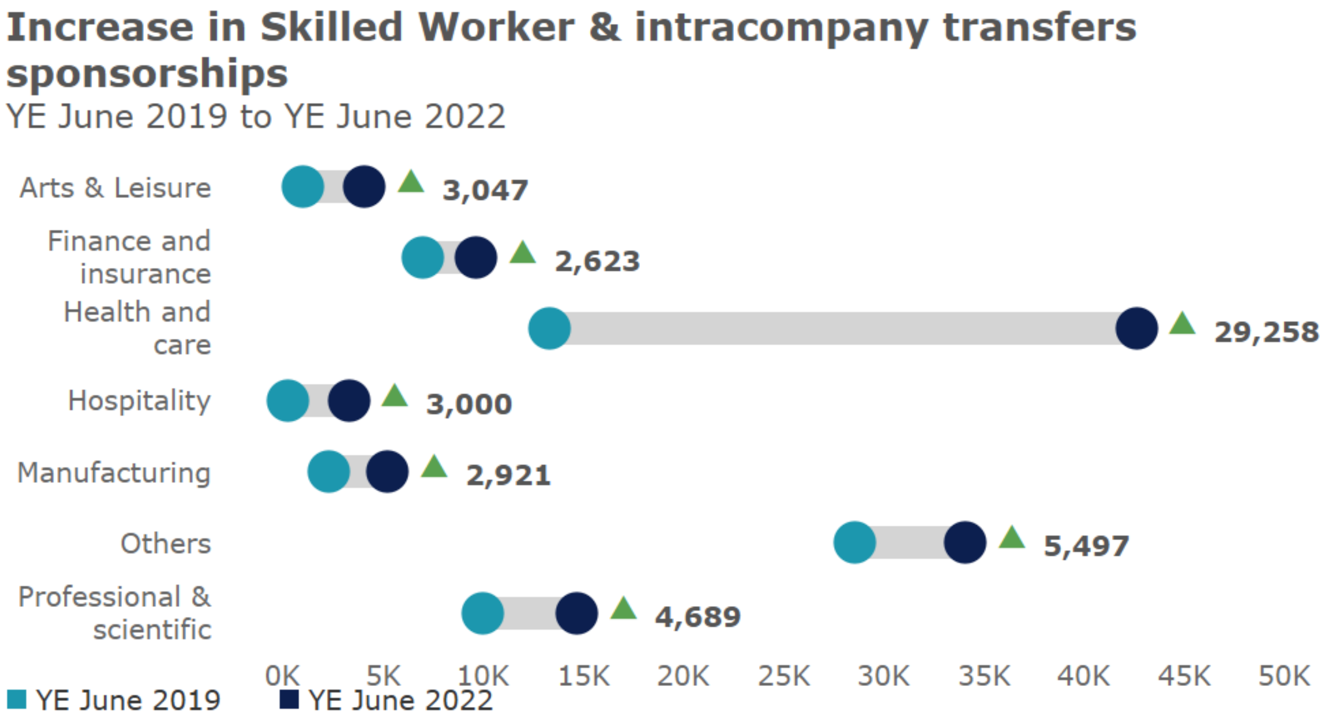
Figure 6



Finally, work visas contributed 107,000 or 23% of the total increase. Here, the growth was driven by skilled workers: an increase of 91,000 or 20% of the total rise in visa grants since 2019. (Note that figures on each category's percentage contribution to the total increase in visas issued will sum to 100%, but some combinations of categories will sum to more than 100% because other categories have declined since 2019.)

The largest driver of skilled worker grants has been high demand in the health and care sector. From the year ending June 2019 to the year ending June 2022, the number of main applicants for skilled work visas in the health and care sector increased by around 51,000 (this excludes accompanying family members). More than half of this growth (57%) came from the health sector (Figure 7). Overall, this sector made up 38% of certificates of sponsorship for skilled sponsored workers, including intracompany transfers (Appendix Table 3).

Figure 7



Source: Migration Observatory analysis of Home Office Immigration Statistics, Table CoS_D01.

One factor behind higher numbers of health and care visas issued is that the NHS has increased staffing, particularly among nurses. The number of full-time equivalent nurses working in NHS hospital and community health settings, for example, increased by more than 30,000 from July 2019 to July 2022. In February 2022, the government also made care workers eligible for skilled work visas, following a recommendation by the Migration Advisory Committee. Skills for Care estimates that by September 2022, 10,000-15,000 people had moved to the UK to take up care roles, suggesting that take-up of the new care worker visa option may be significant.

Is this a 'new normal' or a temporary trend?

The high level of visa grants in the past year result from a combination of three entirely separate trends: the humanitarian routes introduced for Ukrainians and Hong Kong BNOs; student visa increases; and growth in demand for skilled work visas, particularly in the health and care sector.

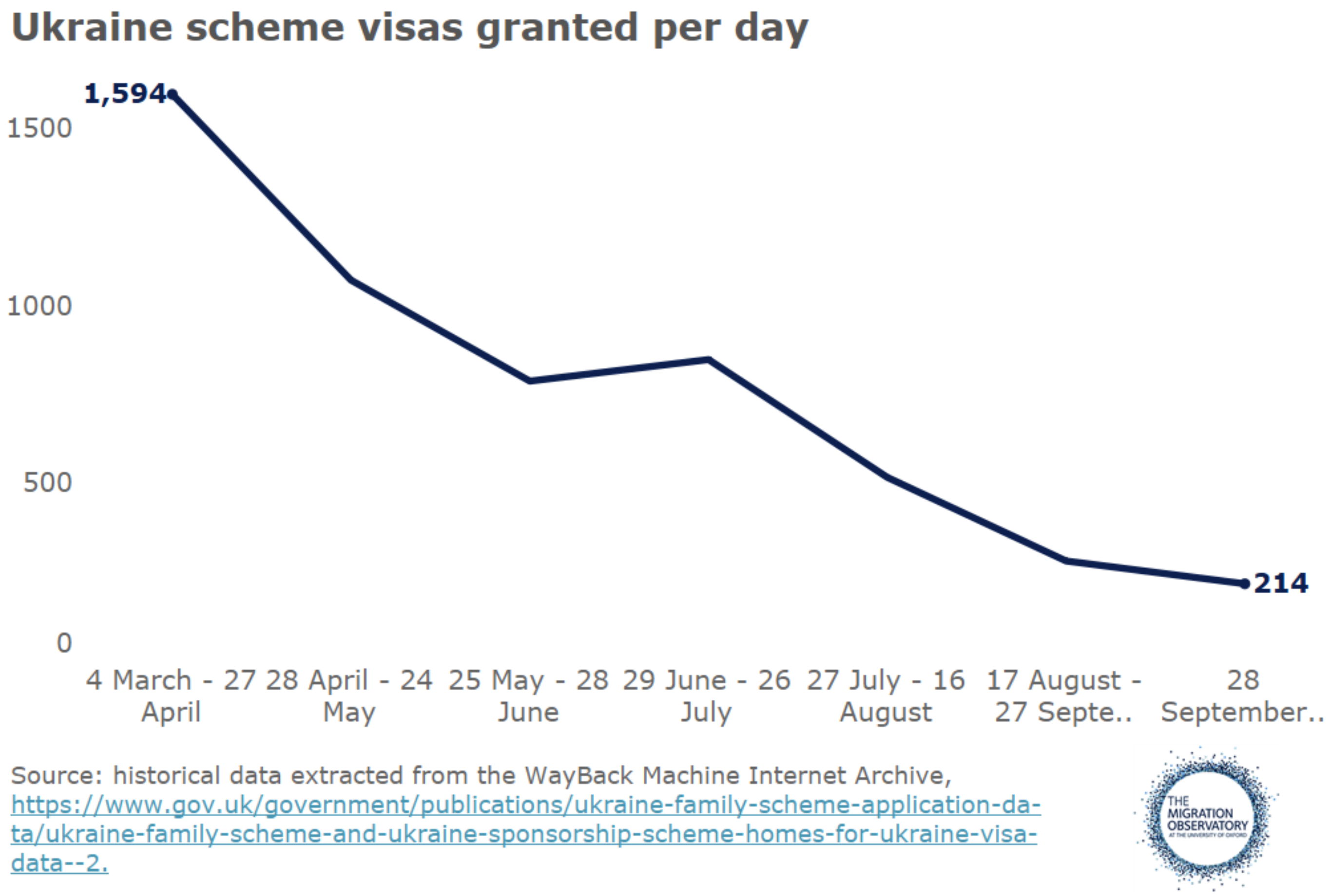
Although these increases took place shortly after Brexit, for the most part they have *not* been a direct result of the post-Brexit immigration system or the end of free movement. The Ukraine and BNO schemes together contributed the largest share of the increase in visa grants and were not part of the system designed to replace free movement, for example. Some of the increase in skilled work visa numbers would likely have taken place anyway under the pre-Brexit system, in which doctors and nurses were already eligible. (Indeed, the upward trend in health sector visa sponsorship started well before the new immigration system was introduced in January 2021.)

Forecasting the numbers in coming years is difficult, but there are reasons to believe that at least some of the increases seen in recent years will be temporary, while others may persist for longer.

Ukraine and BNO schemes

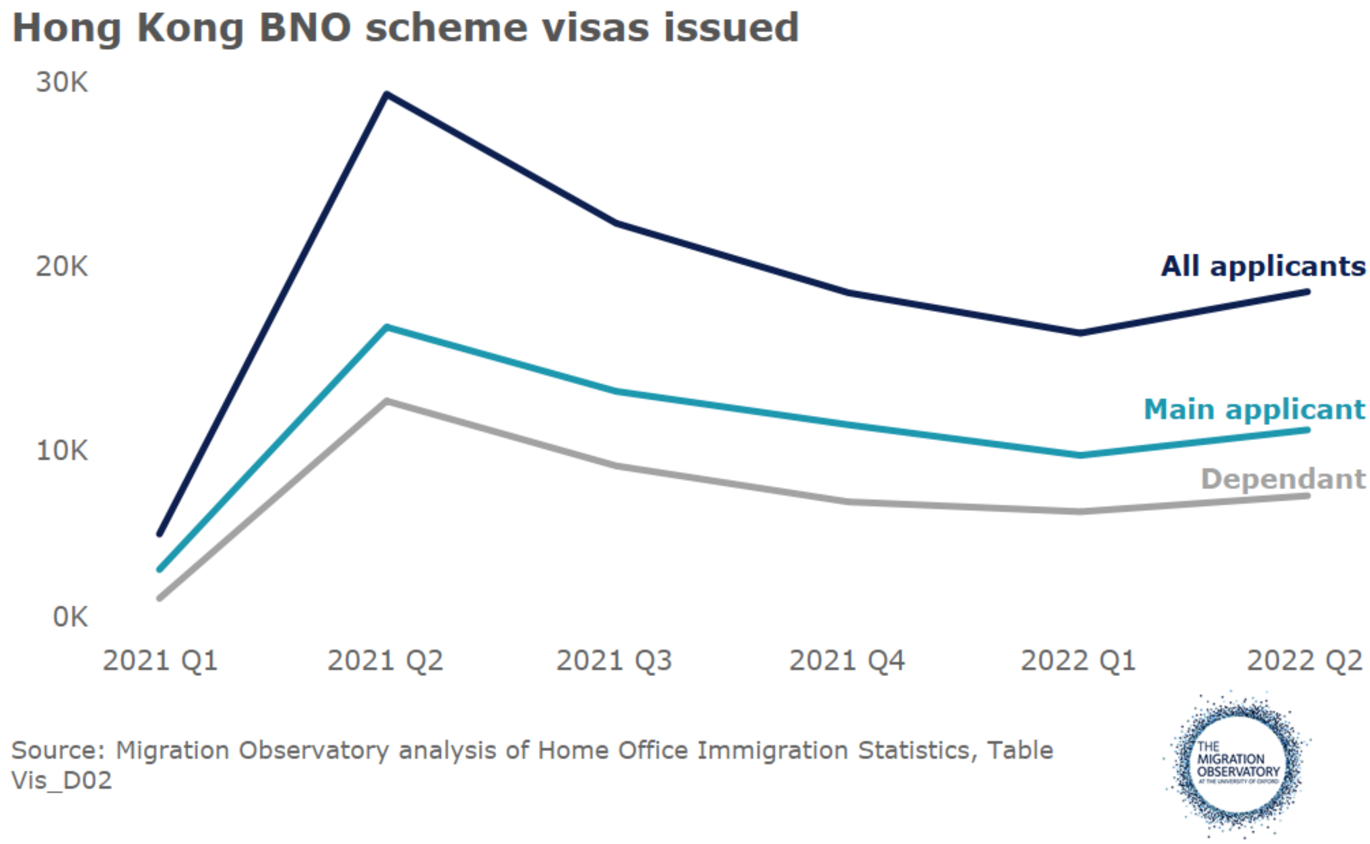
The crisis in Ukraine has been one of the most important drivers of increased non-EU visa grants. The numbers of visas granted was highest in the early weeks after the Russian invasion, and have since tapered off. In the first few weeks of their operation, from 4th March to 27th April, the Ukraine family and sponsorship schemes issued just under 1,600 visas per day. By October, this had fallen to just over 200 per day. In the medium term, the numbers could increase again if conditions in Ukraine deteriorate. But in the long term, the Ukraine schemes are not expected to continue indefinitely.

Figure 8



The number of BNO visas that will be issued in future is uncertain and will depend, among other things, on conditions in Hong Kong. Compared to the Ukraine schemes, the number of visa grants has been steadier over time after an initial peak in the early weeks of the programme (Figure 9). Home Office modelling of the BNO route assumed that the number of applicants would be highest in the first year and then fall substantially, although it is too early to say whether this will bear out in practice.

Figure 9



Study and work visas

As new data emerge over the coming year, it should become clearer to what extent the high number of student visas issued in the year ending June 2022 is a bounce-back from the pandemic as people who previously studied remotely moved to the UK. The UK may also have admitted students who might otherwise have studied in Australia, which saw a large drop in the number of Indian students enrolled during the pandemic. The long-term outlook for student numbers thus remains uncertain.

It is also difficult to predict how long the boom in recruitment of overseas health professionals will last. Demand for overseas health professionals depends in large part on the number of domestically trained nurses in employment. The previous spike in overseas recruitment to the NHS, in the early 2000s, lasted a few years and then fell sharply as a larger number of domestically trained staff entered the workforce. While the number of nurses starting training in the UK increased by 29% from 2016/17 to 2021/22, the number of nurses leaving the NHS in England also increased sharply in the year ending June 2022 and declining real-terms pay is also expected to make retaining nurses more difficult.

Meanwhile, take-up of visas in industries where some middle-skilled jobs are newly eligible for the immigration system—such as construction and hospitality—has been relatively low, both among EU and non-EU citizens. Together, the manufacturing, hospitality, construction, retail and logistics industries sponsored only 4,000 entry visas in the second quarter of 2022, or 12% of the total. It is possible that numbers will increase in coming years as employers become more familiar with the process of sponsorship.

In summary, we cannot assume that the current level of visa grants is a 'new normal'. The recent period has been unusual in several ways. In particular, substantial numbers of visa grants to Ukrainian citizens and Hong Kong BNO status holders are not expected to continue indefinitely. For work and study, the long-term prognosis is less clear: there are plausible scenarios in which visa grants decrease, but also where they remain high for some time—especially if NHS recruitment and retention of domestically trained health professionals does not improve.

What does the higher number of visa grants mean for immigration and net migration?

The analysis above shows that visa grants to non-EU citizens has increased in recent years. This means that the official estimates of long-term immigration and net migration are expected to go up too. New estimates are expected from ONS in late November.

Official estimates also include analysis of net migration, defined as long-term immigration minus long-term emigration. This provides a measure of the contribution of international migration to the UK population over the long term.

Emigration and net migration

Many non-EU citizens come to the UK for periods of a few years, before emigrating again. This means that while they contribute to immigration in the short run, they contribute much less to net migration or to population growth over the long term.

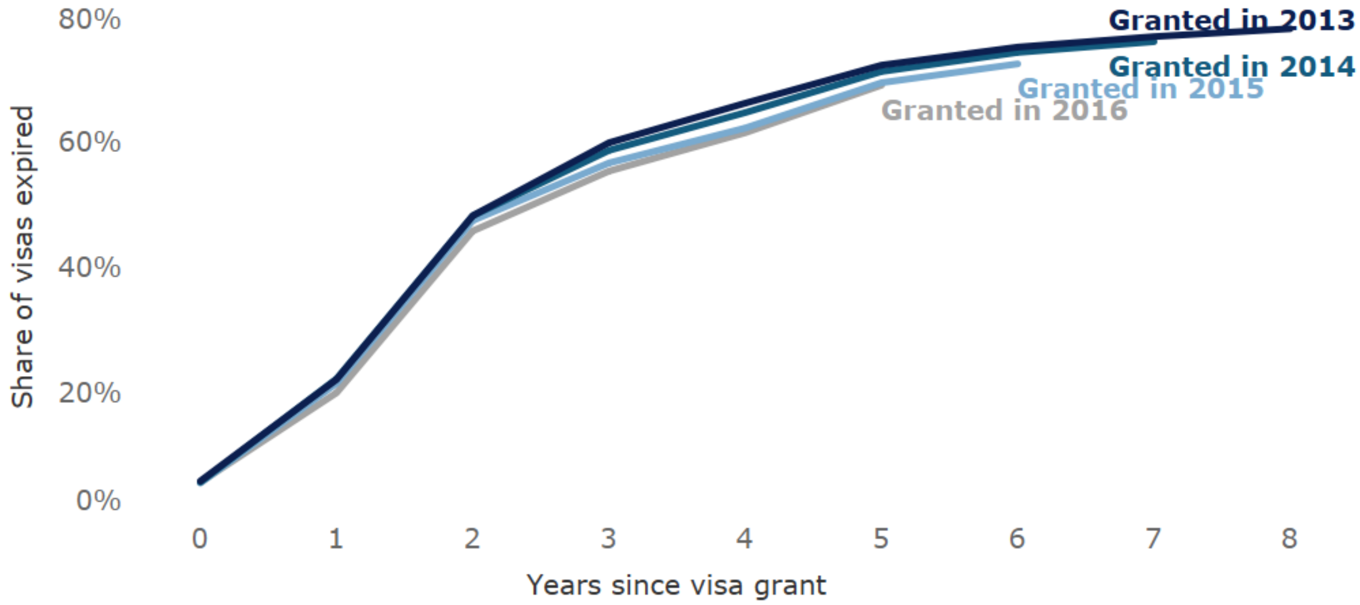
However, in the short to medium term, an uptick in people arriving does affect net migration estimates. This is because an increase in immigration should in theory be followed by an increase in emigration, but not immediately—there is a lag between the two.

In fact, available data show that the majority of non-EU citizens granted visas have been temporary migrants in recent years (Figure 10). About half of non-EU citizens granted status in the UK in the mid-2010s had seen their visas expire by the end of the second or third year after their initial visa was granted, and thus were expected to have left the UK. (This figure includes visa grants for work, study and family as well as grants of protection.) Around three quarters had seen their visas expire by the end of the 7th year.

Figure 10

Share of expired visas, by number of years since initial visa grant

Non-EU work, study and family visas or intl protection, granted in 2014-2016

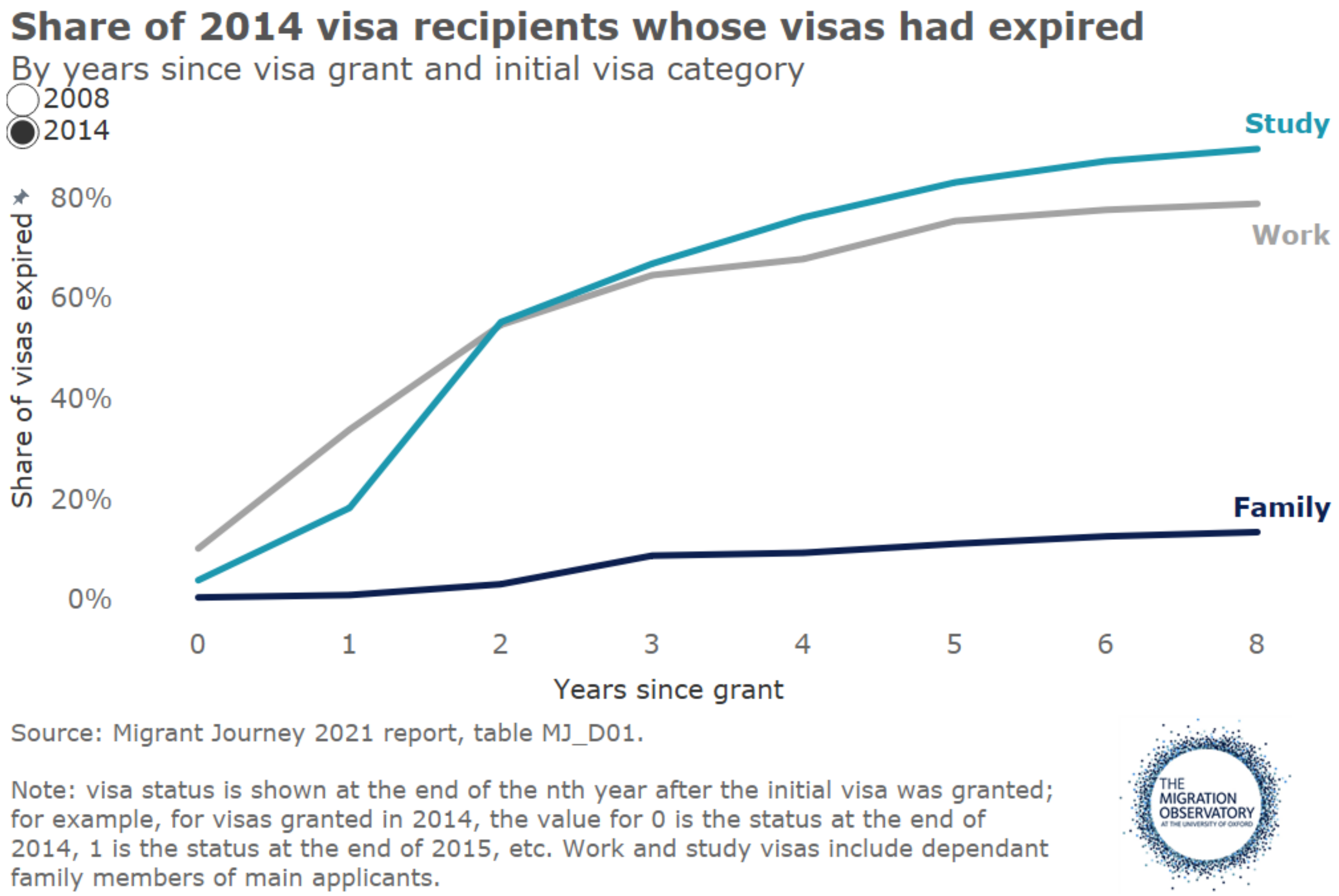


Source: Migrant Journey 2021 report, table MJ_D01.

Note: visa status is shown at the end of the nth year after the initial visa was granted; for example, for visas granted in 2014, the value for 0 is the status at the end of 2014, 1 is the status at the end of 2015, etc.

This is especially the case for international students (Figure 11). Among students receiving their initial visas in 2014, for example, just over half had seen their visas expire by the end of 2016 and thus were expected to have left the country. At that time there was no post-study work route, so current student cohorts are expected to stay somewhat longer on average—although post-study work nonetheless does not provide a direct route to settlement. If we look back to student visas granted in 2008, when the previous post-study work regime was in place, a lower share of students saw their visas expire, but nonetheless 83% of the visas had expired by the end of the 8th year after arrival (Figure 11).

Figure 11



The fact that emigration takes place a few years after immigration means that when immigration is increasing, net migration estimates are expected to go up in the short run, even if the people in question will eventually leave. As a result, theory predicts that net migration will be unusually high in the 1-3 years after an increase in immigration of the kind that the UK is currently experiencing.

Acknowledgments

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Appendix Table 1

Visa category	Increase from 2019 to YE June 2022	% change	% of the increase
Sponsored study	180,426	63%	39%
Work, of which …	107,076	56%	23%
…Skilled workers	*91,113*	*80%*	*20%*
…Temporary workers	*21,360*	*49%*	*5%*
Miscellaneous dependants	-4,540	-48%	-1%
Family	-19,677	-35%	-4%
Other, of which…	203,769	275%	44%
Ukraine	*133,811*		*29%*
BNO	*75,692*		*16%*
Grand Total	467,199	76%	100%

Source: Migration Observatory analysis of Home Office Immigration Statistics Table Vis_D02. Note: percentages may not sum to total due to rounding.

Appendix Table 2: visa grants by category, 2019 and year ending June 2022

Visa category	2019	% of all visas granted in 2019	YE June 2022	% of all visas granted in YE June 2022
Work, of which …	192,556	31%	299,632	28%
…Skilled workers	*113,552*	*18%*	*204,665*	*19%*
…Temporary workers	*43,467*	*7%*	*64,827*	*6%*
Sponsored study	284,720	46%	465,146	43%
BNO route	0	0%	75,692	7%
Ukraine schemes	0	0%	133,811	12%
Family	55,639	9%	35,962	3%
Other	83,579	14%	73,305	7%
Total	**616,494**	**100%**	**1,083,548**	**100%**

Source: Migration Observatory analysis of Home Office Immigration Statistics, Table Vis_D02.

Appendix Table 3: Certificates of Sponsorship (CoS) used in entry visa applications for skilled sponsored workers, including intracompany transfers

Sector	YE June 2019	YE June 2022	Increase: 2019-2022 (YE June)	% Increase	Sector's contribution to total increase	Sector's share of all CoS in YE June 2022
Health and care	13,344	42,602	29,258	219%	57%	38%
Professional & scientific	9,961	14,650	4,689	47%	9%	13%
Arts & Leisure	1,023	4,070	3,047	298%	6%	4%
Hospitality	294	3,294	3,000	1020%	6%	3%
Manufacturing	2,293	5,214	2,921	127%	6%	5%
Finance and insurance	6,992	9,615	2,623	38%	5%	8%
Others	28,555	34,052	5,497	19%	11%	30%
Total	62,462	113,497	51,035	82%	100%	100%

Source: Migration Observatory analysis of Home Office Immigration Statistics, Table CoS_D01.

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.

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