

Demographic trends in Wales

An analysis of how migration influences
Wales' current and projected population.

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FOUNDATION

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Summary

Over the last 20 years since 1997 Wales' population has increased by 8 percent to 3,125,200 people. As Wales had more deaths than births between 2016 and 2017, resulting in a natural change of -874, nearly all of Wales' population growth was due to internal and international migration.

This briefing looks at the recentⁱ and projected trends in population, paying special attention to the role migration plays in influencing Wales' population.

Key points:

- Nearly all recent growth in population has been from net migration. Without migration, based on births and deaths only, Wales' population would have decreased between 2016 and 2017.
- The majority of in-migrants are from elsewhere in the UK. Of net international in-migration, more than twice as many migrants are from outside the EU than from inside it. The main reason for international in-migration is study.
- Younger age groups are much more migratory, whether in or out of Wales and whether migrating within the UK or internationally, than other age groups.
- However, there is high in and out migration of young people to and from elsewhere in the UK, resulting in higher internal net migration of older people from these areas.
- The vast majority of international net migration is of younger age groups.
- Looking ahead, Wales' population is projected to decrease by 2037 unless there is some level of internal and / or international migration.
- The number of people of working age is projected to drop significantly by 2037, even if migration is at a high level.
- The number of older people is projected to rise significantly by 2037, with the lowest proportion of older people in the population occurring with high migration.
- It is clear that although migration is a complex issue, Wales' future population growth relies on people coming into Wales from within and outside the UK.

ⁱ All data was correct as of October 2018.

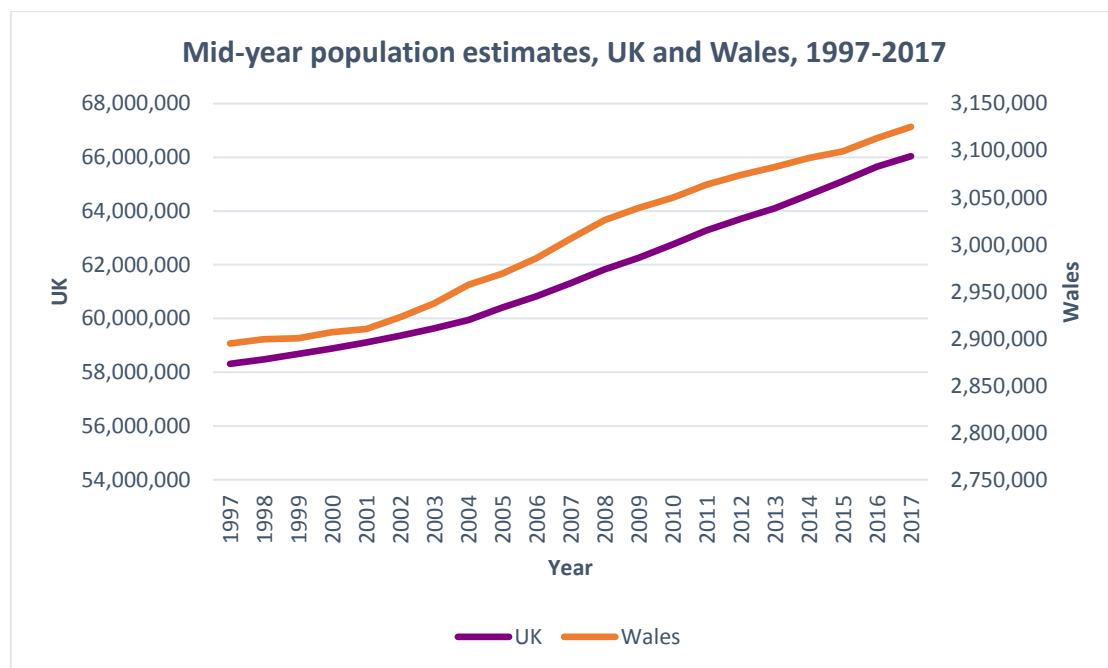
1. Introduction

Wales' population has undergone rapid and striking changes in the last twenty years. Future changes are much less certain, having to take into account not only possible different rates of fertility and mortality and varying levels of movement of people into and out of Wales from elsewhere in the UK, but also unknown effects of changes in immigration policy following the UK's withdrawal from the EU.

This briefing paper gives an outline of the past, current and future demographic trends in Wales. It looks at the current population and reasons for recent trends, paying particular attention to the role migration has played and may continue to play in the future. From this it highlights some of the important debates that need to take place about immigration and immigration policy in Wales.

2. Recent population change

Wales population has grown from 2,894,900 in 1997 to an estimated 3,125,200 in 2017. This increase of 230,300 people in 20 years¹, some 8 percent, is modest compared with growth of over 13 percent in the UK as a whole².

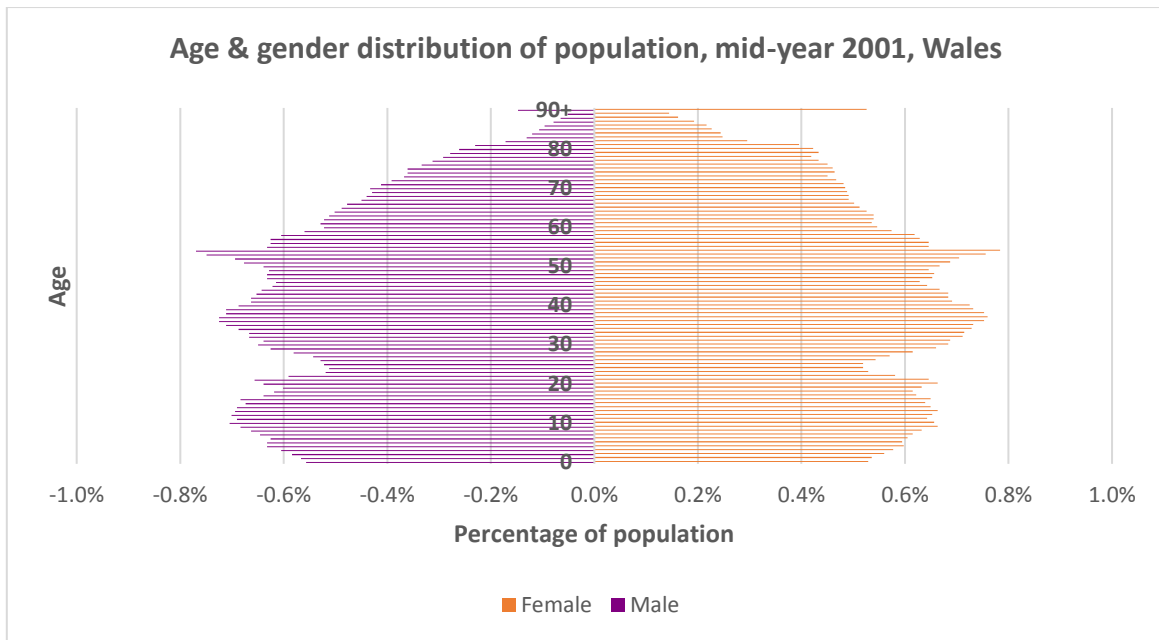


2.1. Age and gender distribution

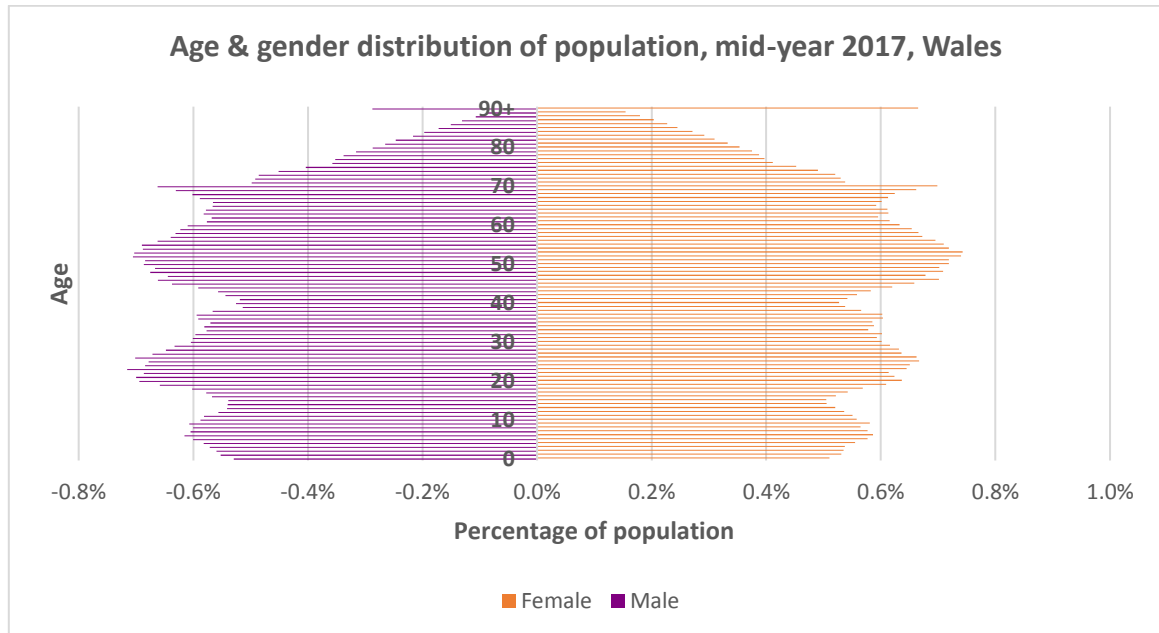
As well as an increase in numbers, the age and gender distribution of Wales' population has changed over the years.

The mid-year population estimates for 2001³ and 2017⁴ show the population of Wales ageing over the last 16 years with the number of people aged 65 years or over increasing by 27 percent. In 2017, just under 21 percent of the population were aged 65 years or over compared to 17 percent in 2001. Additionally, 1 percent were aged 90 or over compared to 0.7 percent in 2001.

Although Wales has an ageing population, the share of the population which is of working age (aged 16 to 64 years) has remained the same over the last 16 years at 62 percent of the total. However, the percentage of the population aged 20 years or younger has dropped from 27 percent in 2001 to 24 percent in 2017, a 3 percent drop in the number of people aged 20 years or younger.



With regards to gender, there were more males in the younger age groups in both 2001 and 2017, with males making up 51 percent of those under 19 years old in 2001 and 51 percent of those 30 years or younger in 2017. As the population gets older in both years the distribution changes, with females making up a higher share of the population. However, the gap in the number of males and females in the older age groups has narrowed over time: in 2001, of those aged 65 years or over 58 percent were female, and 42 percent were male, compared to 2017 where 54 percent were female and 46 percent were male.



So, over the last 16 years Wales' population has aged. There are more people aged 65 years or over and aged 90 or over that make up a larger share of the population. At the same time, there are fewer people aged 20 or younger who therefore comprise a smaller proportion of the total population. Although, the share of the population that is of working age has stayed the same. Males also made up more of the younger population and females made up the majority of the older population, especially those aged 65 or over.

2.2. Components of change

Changes in the population are caused by three main components. The first is fertility and the number of births. The second is mortality and the number of deaths. Both fertility and mortality make up the natural change in the population. This is calculated by taking the number of deaths away from the number of births each year.

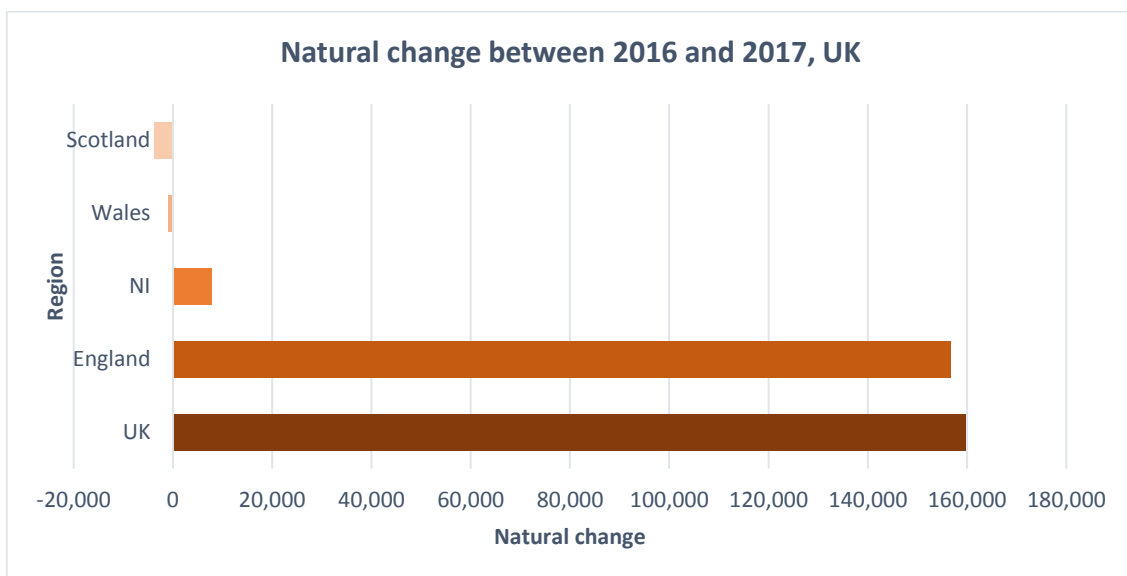
The third component of population change is net migration, which measures people moving in and out of Wales from inside the UK, known as net internal migration, and from outside the UK, known as net international migration.

Natural change

Over the last twenty years, natural change in Wales has fluctuated considerably. In 2001 to 2002, natural change was -2,720 people whilst in 2010 to 2011 it was at a high of +5,353 people.

Looking at recent figures, in 2016 the Total Fertility Rate (TFR)ⁱⁱ in Wales was 1.74⁵ and the Age Standardised Mortality Rate (ASMR) for Wales in the same year was 1045.7 deaths per 100,000 population⁶. Between 2016 and 2017 there were 32,371⁷ live births and 33,245 deaths,⁸ leading to a natural change in population of -874 people.

Wales differs significantly to England, where the population increased by 156,763 as a result of natural change, and Northern Ireland, where population increased by 7,697 because of more births than deaths. It has more in common with Scotland, where natural change resulted in a population decrease of -3,810. In the UK as a whole natural change between 2016 and 2017 was +159,776, entirely due to positive natural change in England and Northern Ireland⁹.

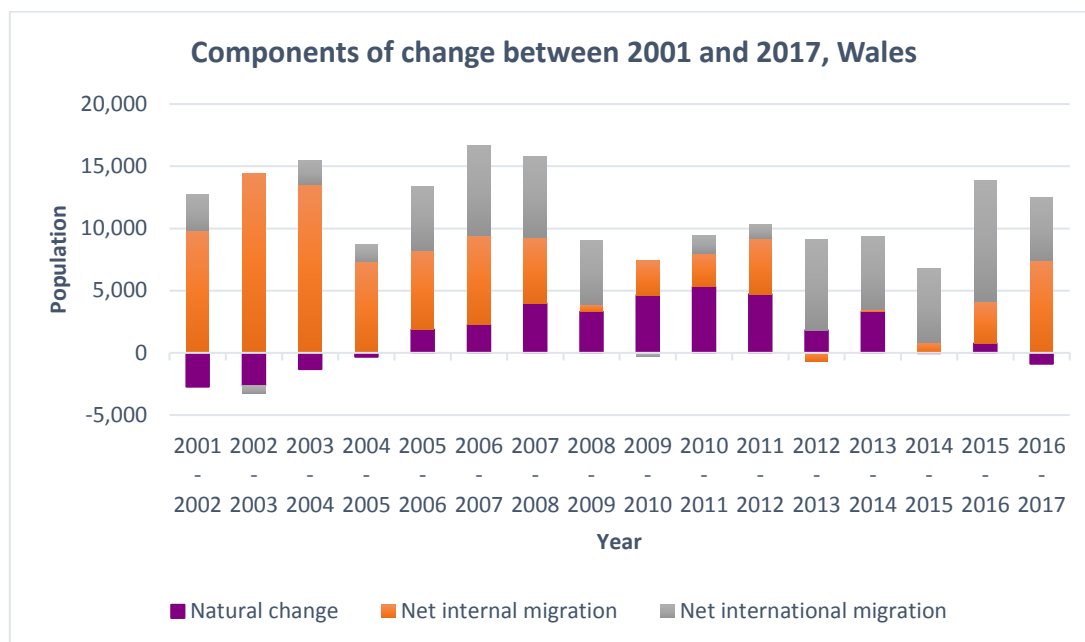


Put simply, Wales is not replacing – let alone growing – its population through natural change alone. What modest growth Wales has seen in its population is almost entirely attributable to the third component of population change – net migration.

ⁱⁱ The Total Fertility Rate (TFR) is the average number of live children that a group of women would bear if they experienced the age-specific fertility rates of the calendar year in question throughout their childbearing lifespan.

Net Migration

Net migration has played a pivotal role in Wales' population change. Between 2016 and 2017, 97 percent of Wales' population growth resulted from the net migration of people. (An additional 3 percent of population growth occurred from other changes, including changes in the size of the armed forces and prison populations). In total, 57 percent of Wales' population growth was from internal net migration and 39 percent was from international net migration.



Without these positive net migration figures Wales' population between 2016 and 2017 would have dropped. As the graph above shows, net internal and net international migration has contributed a lot to Wales' population growth over time.

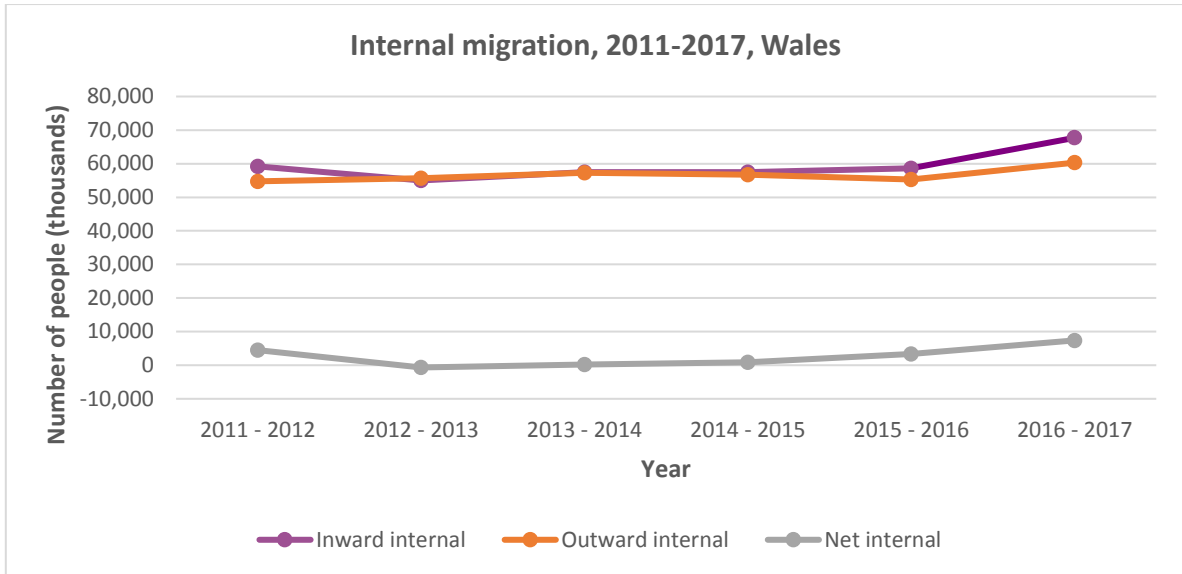
The next sections will discuss internal and international migration in more detail.

2.3. Internal migration

Internal migration is the movement of people into and out of Wales from within the UK. People coming into Wales from within the UK are referred to as inflows or inward migration and people leaving Wales to go elsewhere in the UK are referred to as outflows or outward migration.

Over the last six years the number of people who have come into Wales from elsewhere in the UK has varied. Its lowest was between 2012 and 2013 with 55,014 people coming into Wales and its highest was between 2016 and 2017 with 67,690 people coming into Wales. The number of people leaving Wales to go to other parts of the UK is steadier. The lowest number of people leaving Wales was 54,753 people between 2011 and 2012 and the highest was 60,304 people leaving Wales between 2016 and 2017.

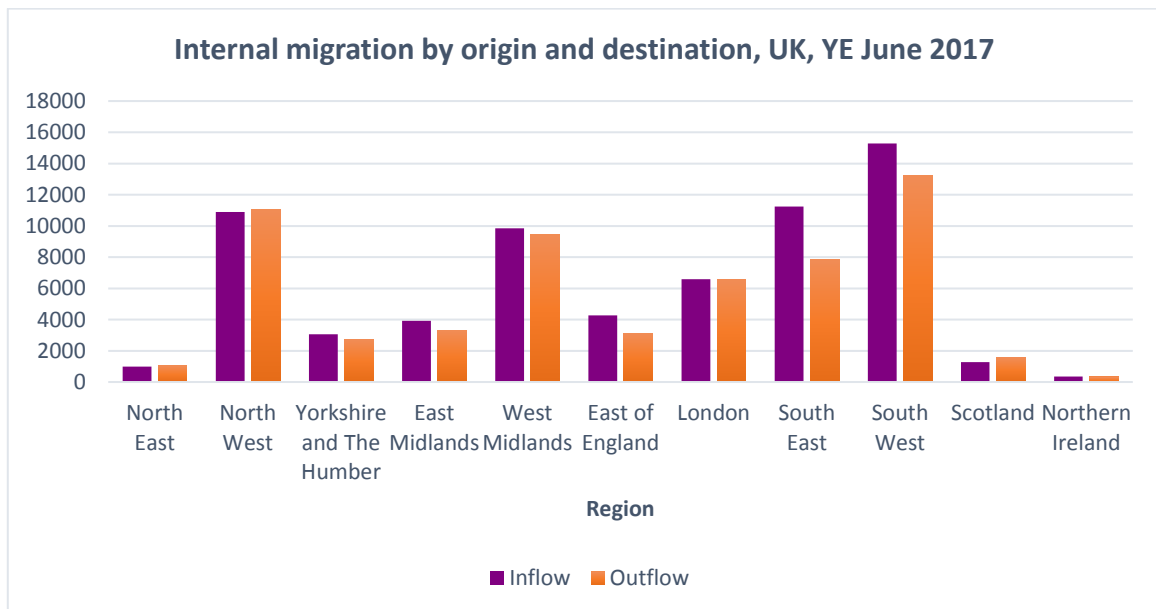
Net internal migration is calculated by taking the outflows of people away from the inflows of people to show the net change whether positive or negative. Net internal migration has fluctuated markedly, reaching its lowest between 2012 and 2013 with -665 people (meaning that more people left than entered Wales) and its highest between 2016 and 2017 at +7,386 people.¹⁰ This is the highest net internal migration since 2002-2003.



Origin and destination

Using data from year ending June 2017¹¹, of those coming into Wales from other parts of the UK more people from the South West (23 percent) came to Wales than from any other region – 15,280 people in total. This was followed by people coming from the South East (11,250) and the North West (10,890), with fewer people coming from Northern Ireland (360), the North East (990) and Scotland (1,270).

When it comes to people leaving Wales to go to other parts of the UK a similar pattern emerges. More people leaving Wales (22 percent) went to the South West (13,240), followed by the North West (11,050) and the West Midlands (9,450), with fewer people going to Northern Ireland (330), the North East (1,060) and Scotland (1,590).



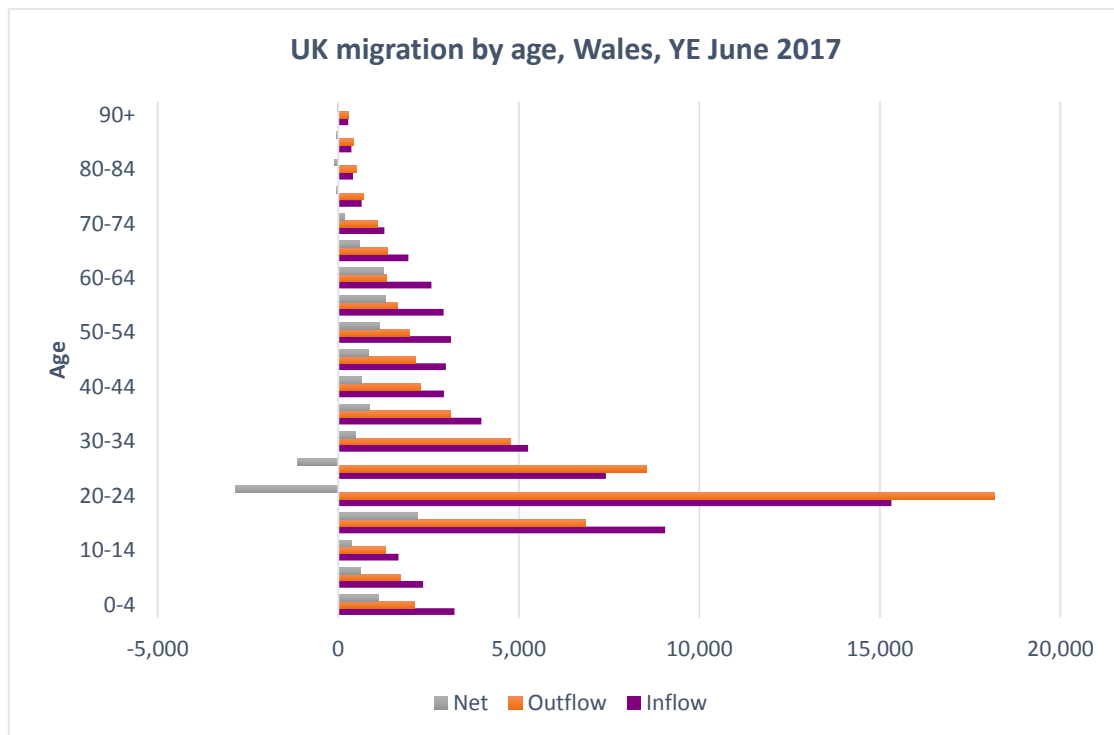
Age and gender

The figures from year ending June 2017¹² show that more people aged between 15- and 29-years old immigrated to and emigrated from Wales than the older age groups.

Looking at in-migrants, 23 percent (15,320 people) were aged 20-24 years old followed by those aged 15-19 (9,050 people) and those aged 25-29 years old (7,410 people). A similar

picture emerges when looking at the outflows of migrants. 30 percent of those leaving were aged 20-24 (18,180 people), with a further 14 percent aged 25-29 and 11 percent aged 15-19.

The effect is that Wales experienced a net decrease in the number of 20-29-year olds, but a net increase in all other age groups. Importantly, while the numbers of people aged 50-64 moving into or out of Wales from elsewhere in the UK are smaller than the numbers of younger migrants, the net increase is larger – a gain of 3,680 people aged 50-64, 50 percent of all net migration into Wales from elsewhere in the UK. The result is an increase in the number of people in the older age groups, in addition to growth due to natural change, contributing to the ageing population.



There are only small differences with the inflow, outflow and net internal migration by gender. In year ending June 2017¹³, more females both came into Wales and left Wales than males. In total, 34,740 women came into Wales and 31,010 left Wales resulting in a net internal migration of 3,760 females. During the same period 32,940 men entered Wales and 29,310 left Wales leaving a net internal migration of 3,620 males.

Summary

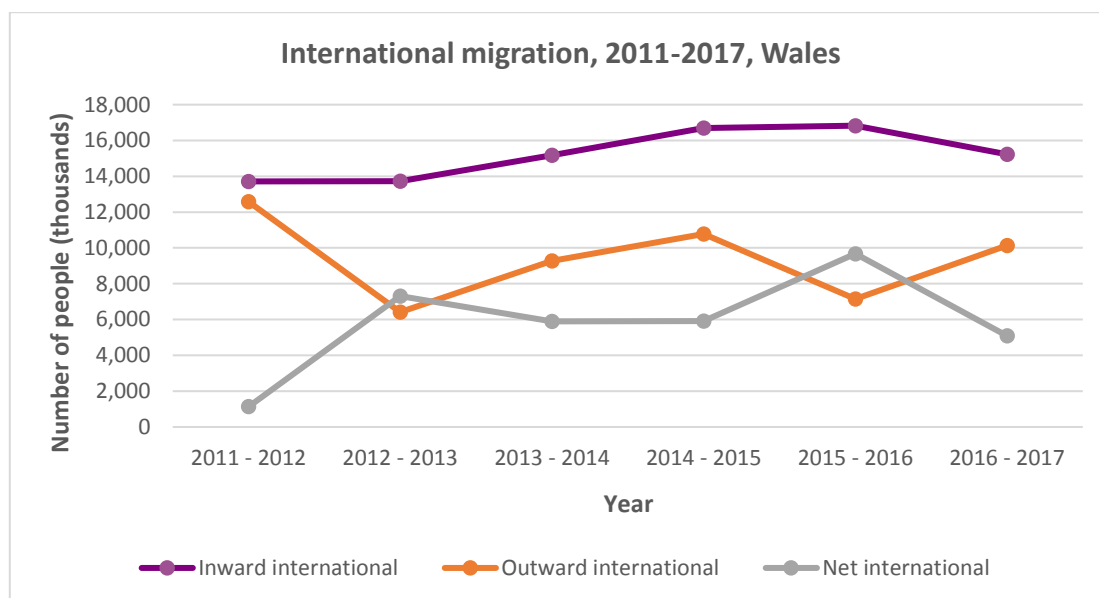
Between 2016 and 2017 more people from within the UK came into Wales and fewer people left Wales to go to other parts of the UK, resulting in Wales' population increasing by an extra 7,386 people in one year. More people coming into Wales from within the UK came from the South West, and similarly more of those leaving Wales went to the South West, presumably due to its proximity.

Younger people were more likely to be mobile with those aged 15 to 29 making up just under a half of those coming into Wales but over half of those leaving Wales. So, young people are much more likely to come into Wales but are also more likely to leave Wales leaving behind people in the older age groups, contributing to an already ageing population.

2.4. International migration

International migration is the movement of people in and out of Wales from outside the UK. Those coming into Wales are referred to as inflows or inward migration, and those leaving Wales are referred to as outflows or outward migration.

There are different types of data on international migration that are used in this section. Local area migration estimates between 2016 and 2017¹⁴ show that more people came into Wales from outside the UK than left Wales: 15,230 people from outside of the UK moving in and 10,140 people moving out. This made net international migration during the period a total of +5,090 people – some 2,296 fewer people than came to Wales through net internal migration.



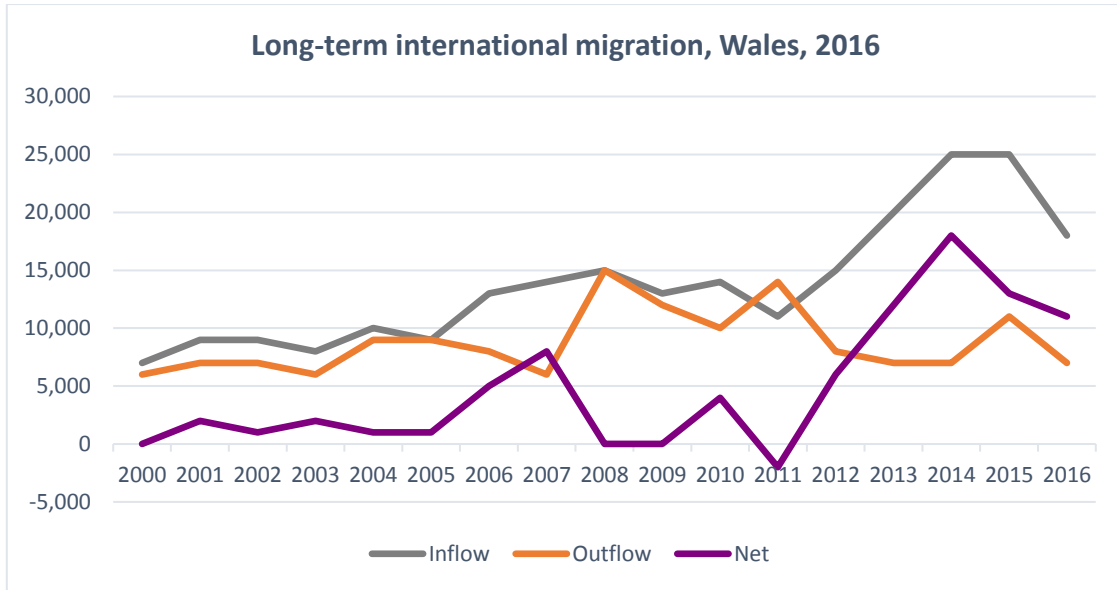
Looking back, net international migration had fluctuated less than internal migration over the last six years. Nevertheless, there have been year-on-year variations, with a low of -574 in 2002-2003 and a high of 9,676 between 2015 and 2016. In contrast to internal migration, there is more variation in the number of outmigrants than in-migrants.

Long-term international migration

This section looks at long-term international migration using data from the international passenger survey (IPS)ⁱⁱⁱ, which differs slightly to the population estimates above. The IPS data shows higher levels of recent net long-term international migration^{iv} reaching an estimated 18,000 people in 2014 and dropping to 11,000 people in 2016. This includes 18,000 people coming into Wales from outside the UK and 7,000 people leaving Wales to go to countries outside the UK, both including UK-born people¹⁵.

ⁱⁱⁱ Care must be made when making inferences from estimates due to some having high confidence intervals – for more information read the notes published with the data.

^{iv} Long-term international migration includes those who have been in Wales for over 12 months. Those who have been in Wales between 1-12 months are referred to as short-term international migrants.

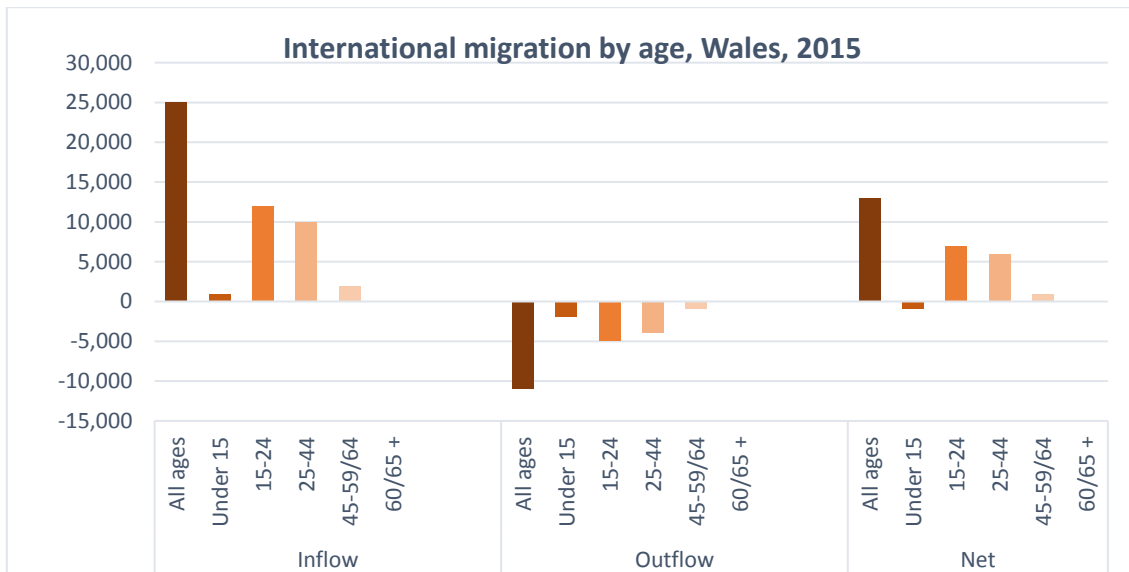


Age and gender

Much like internal migration, the inflows and outflows of long-term international migration in 2015¹⁶ were much larger among younger age groups than older people.

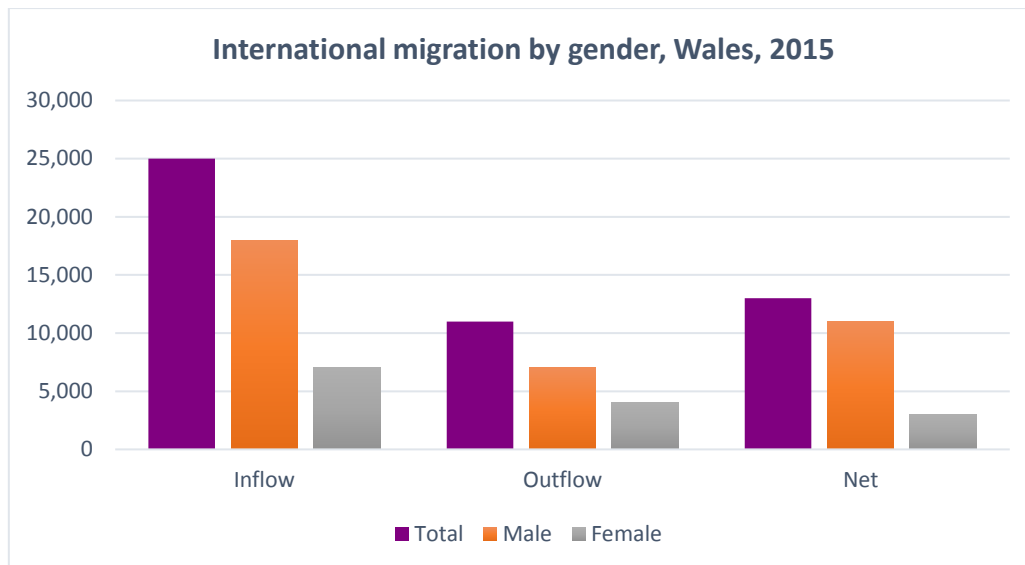
The vast majority of those immigrating to Wales from outside the UK were people aged 15-24 years old (48 percent) and 24-44 years old (40 percent). Only 8 percent were aged 45-59/64, and the proportion aged 60/65+ was negligible. Similarly, the vast majority of people emigrating out of Wales to destinations outside the UK were aged 15-24 and 24-44 years old – 45 percent and 36 percent respectively.

More young people came into Wales than left and as a result, younger age groups accounted for almost all net long-term international migration. More than half of the net increase comprised of 15-24-year olds (7,000 people), while 24-44-year olds made up an additional 46 percent (6,000 people). Only a very small proportion of net international migration comprised people aged under 15 or over 60/65 years old.



In 2015, there were also differences in gender among those coming into Wales from outside the UK. There were vastly more males immigrating into and emigrating from Wales than females, with an estimated 18,000 men coming into Wales and 7,000 leaving Wales

compared to 7,000 women immigrating to and 4,000 leaving Wales. Although more males left Wales, when looking at the proportion of those leaving compared to those arriving, 57 percent of females left Wales compared to only 39 percent of males. This difference leaves the net long-term international migration at 11,000 men and 3,000 women¹⁷.



Country of birth

In 2016, the majority of people coming into Wales from outside the UK were born outside the EU. An estimated 11,000 people born outside the EU immigrated to Wales, 61 percent of international immigrants, compared to 5,000 people born within the EU (28 percent of international immigrants) and 11 percent of immigrants who were born within the UK¹⁸. Although data is limited, the majority of those coming into Wales from outside the EU were from East Asia (5,000 people) and the Middle East and Central Asia (2,000 people).

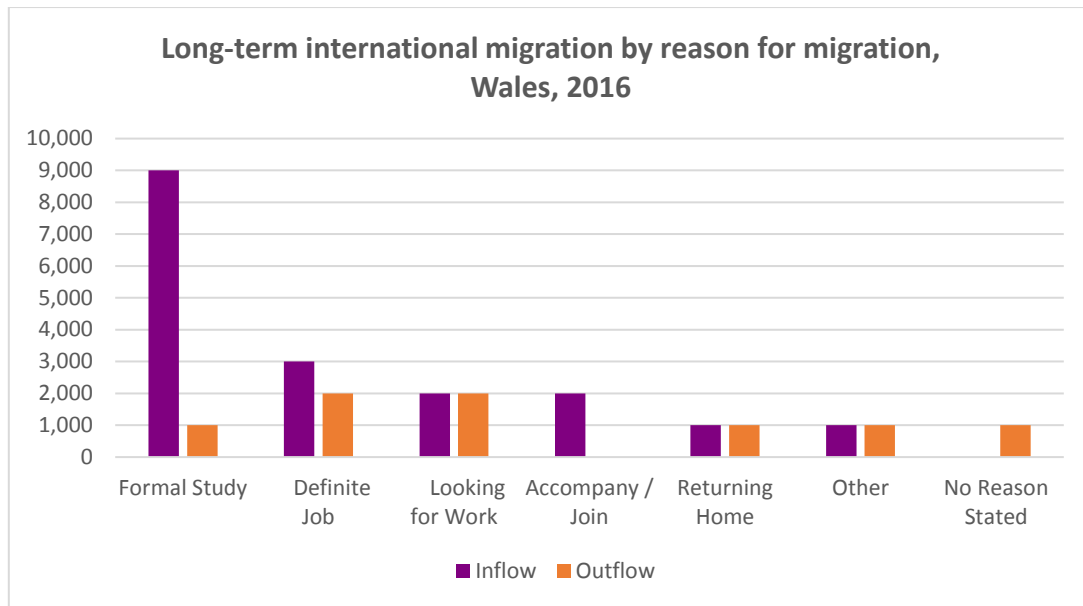
When looking at those leaving Wales, more people who were born in the UK left Wales than those born elsewhere. In 2016, an estimated 4,000 people born in the UK left Wales compared to 2,000 people born outside the EU and 1,000 born within the EU.

The net effect of long-term international migration on the population of Wales in 2016 was to increase its diversity: there was a decrease of 3,000 UK-born citizens, an increase of 4,000 EU-born citizens and an increase of 9,000 non-EU-born citizens. However non-UK born citizens are still a relatively small proportion of the population in Wales making up only 6 percent of the total population in 2017¹⁹.

Reason for migrating

There are various reasons why people choose to migrate to Wales, the most common being study-related or work-related. In 2016, half of the people who immigrated to Wales from outside the UK came for formal study – 9,000 people in total. An additional 28 percent came for work-related reasons: of these 3,000 came for a definite job and 2,000 people came to look for work. A further 11 percent of people came to accompany or join family and 6 percent were returning home²⁰.

^v Care must be made when making inferences from estimates due to some having high confidence intervals – for more information read the notes published with the data.



The picture for those leaving Wales to go outside the UK was quite different. The majority of those leaving Wales (57 percent) left for work-related reasons with 2,000 people leaving for a definite job and another 2,000 leaving to look for work. Only 14 percent of those leaving Wales were leaving for formal study and another 14 percent were leaving to return home.

Summary

So looking back, whether using local area migration estimates or long-term international migration estimates more people have come into Wales from outside the UK than have left, although the scale of net international migration depends on the data used. As with internal migration, young people are more mobile and more likely to migrate. Just under half of those coming into Wales and five in nine of those leaving Wales were aged 15-24 years old. However, unlike internal migration more young people came to Wales than left, leaving behind more people aged 15-24. Additionally, most of those coming into and out of Wales from outside the UK were male.

Migration from outside the EU accounts for the majority of international movements into Wales. Three in five in-migrants were born outside the EU and only two in seven were born within the EU. When looking at those leaving Wales to go to countries outside the UK, most were UK-born – so more UK-born people left Wales than non-UK-born people.

This might be linked to the reasons for migrating. The majority of those coming into Wales came to study whereas most of those leaving Wales left to either start or look for work.

3. Population projections

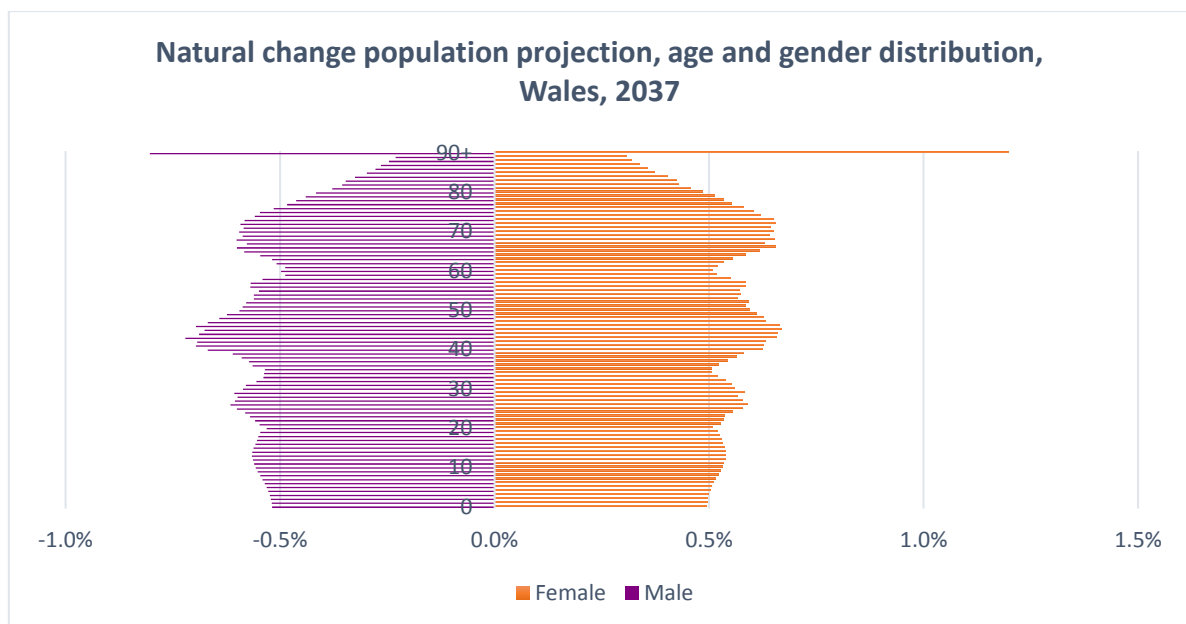
Just as population change is made up of births, deaths and migration, projections of future populations make assumptions about these components. Here we look at five different projections of Wales' population in the future: natural change, the principal projection, high migration, 50 percent drop in EU migration and low migration.

3.1. Natural change projection

Based on expected births and deaths, with no migration into or out of Wales, the natural change projection in 2037²¹ anticipates that Wales' population will decrease to 3,094,843 - a drop of 30,357 people, equivalent to a 1 percent fall over the next 20 years.

Natural change would also bring major shifts in the age distribution of the population. The trend in ageing is projected to increase, with the number of those aged 65 and over up by 28 percent (178,130 more people) by 2037. At that date, just under 27 percent of the population are projected to be aged 65 years or over compared to just under 21 percent in 2017.

This projected increase in older age groups is accompanied by a forecast decrease in the share of the population of working age. The proportion of people aged 16-64 years is expected to decrease from 62 percent in 2017 to 56 percent in 2037 – a 9 percent drop in the population of working age in 20 years – a fall of some 174,536 people. However, a scenario without migration is highly unlikely as migration, no matter how small, will always occur.

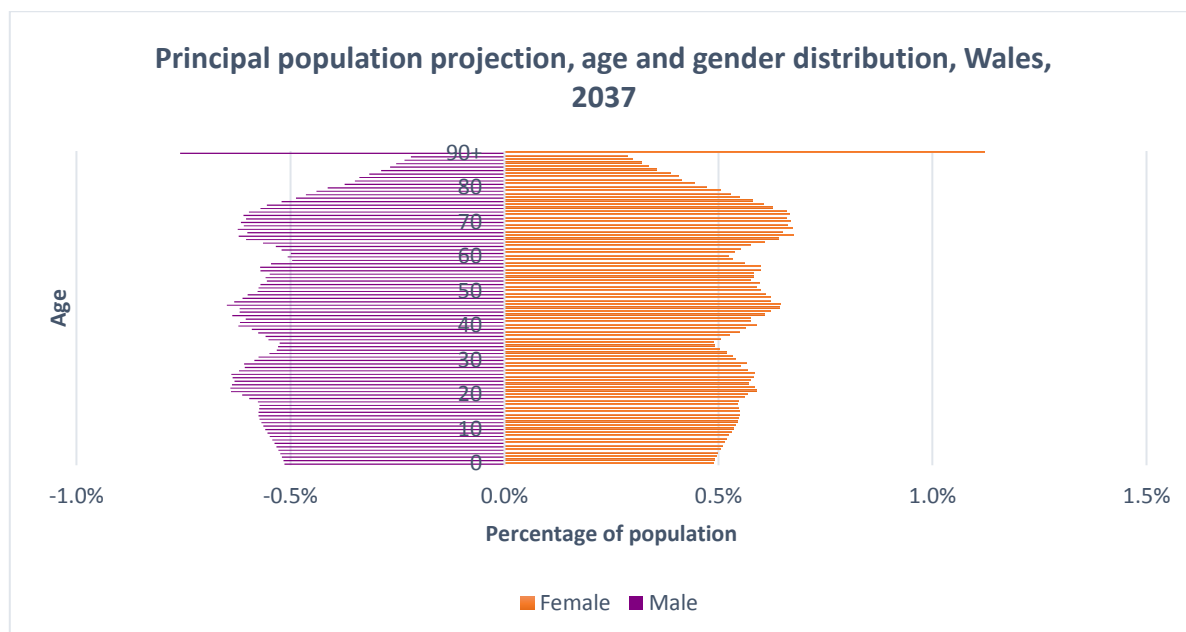


3.2. Principal projection

The principal population projection includes natural change described earlier, along with forecasts of internal and international migration. The principal projection uses migration levels similar to those experienced in Wales in 2016. With these assumptions, Wales' population is projected to increase in the next 20 years to 3,252,311 people – an estimated increase of 4 percent or 127,146 people.

The increase in total population is accompanied by a change in the age distribution. Just under 27 percent of the population are projected to be aged 65 years or over compared to just under 21 percent in 2017 – an increase of 34 percent or 219,329 people. Alongside this,

the population of working age is projected to drop from 62 percent of the total in 2017 to 56 percent in 2037, a decrease of 87,865 people (5 percent) over 20 years.



3.3. High migration projection

Changing the assumptions about migration results in very different population forecasts.

The high migration projection forecasts the population of Wales increasing between 2017 and 2037 to a total of 3,364,220 – an increase of 8 percent in 20 years²². This is an increase of 239,055 more people than in 2017 and 111,909 more people than the principal projection.

This high migration projection results in a slightly different age distribution. Similar to the principal projection, the percentage of the population aged 65 and over is projected to increase to just under 26 percent or 224,737 people, a total increase of 35 percent since 2017. The number of people of working age is projected to decrease, although by much less than under the principal projection – down 0.4 percent in the next 20 years. This would result in a 5-percentage point drop in the proportion of the population who is of working age – to 57 percent.

3.4. 50 percent future EU migration projection

This projection assumes 50 percent less EU migration to Wales than in 2016. In this projection, the population is estimated to increase from 2017 to 3,220,092, a 3 percent increase of 94,927 people. However, the increase is smaller than in the principal projection (by 32,219 people).²³

As with other projections, the number of people aged 65 and over is projected to increase by 34 percent, while the number of people of working age falls by 6 percent.

3.5. Low migration projection

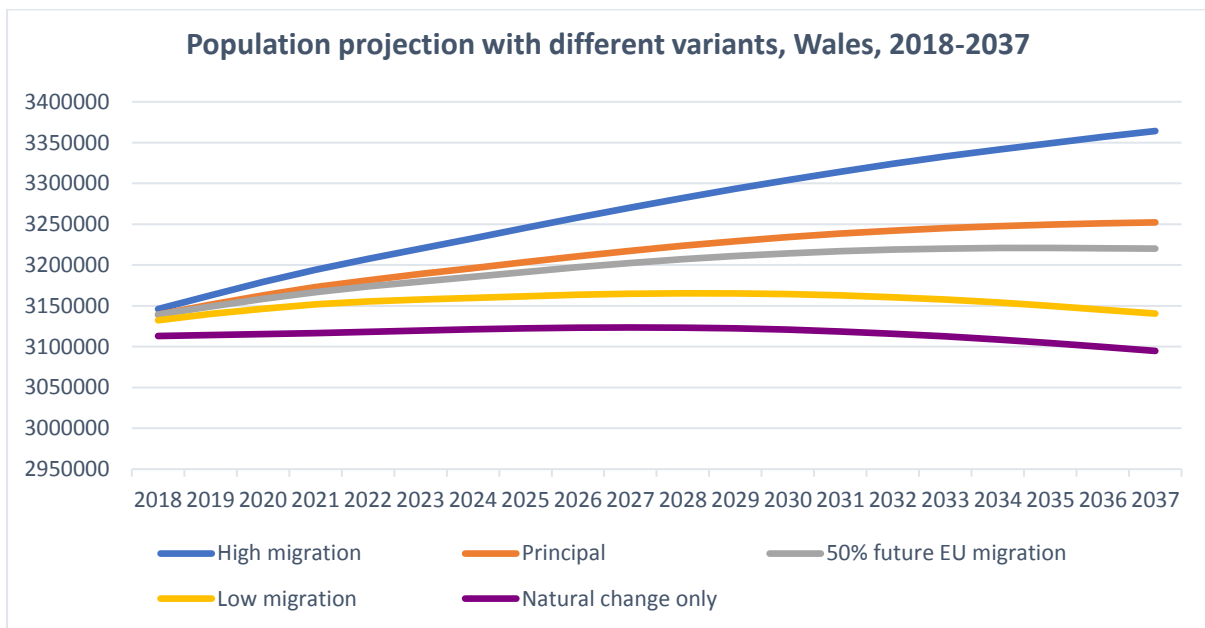
Finally, the low migration population projection assumes lower levels of migration than in 2016. Using this projection, the population of Wales in 2037 is forecast to increase by only 0.5 percent to 3,140,541 in 2037, some 15,376 more people.²⁴

As with other projections, the percentage of the population aged 65 years and over is expected to increase to just over 27 percent and the percentage of working age is expected

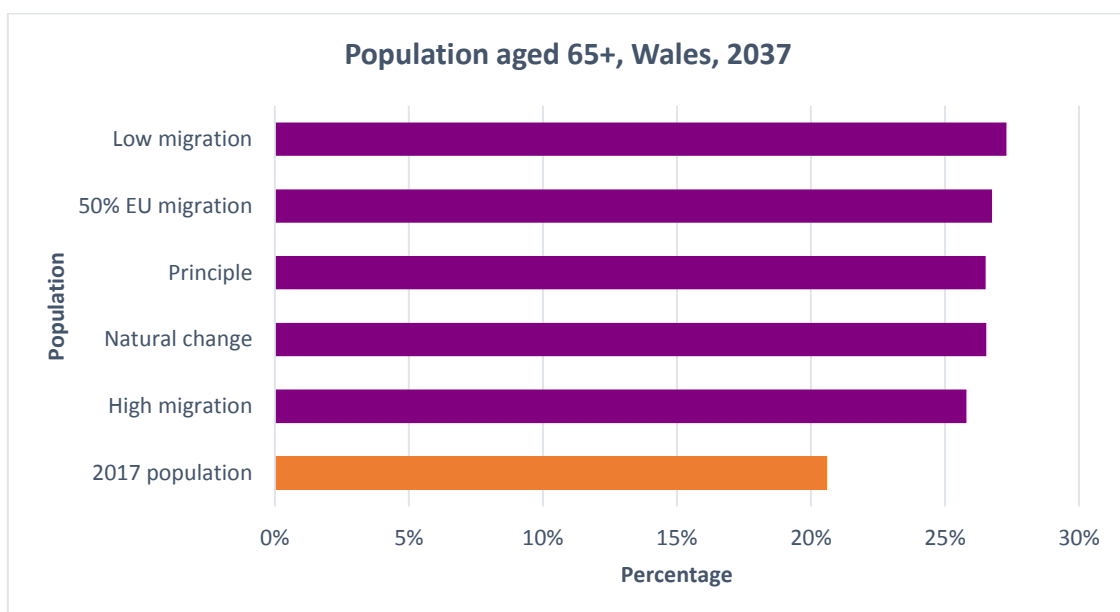
to decrease to 56 percent, down 9 percent. This is the largest forecast decline in the population of working age of all the projections.

3.6. Summary

In summary, the projected population of Wales varies depending on assumptions made about fertility and mortality and, crucially, the levels of migration Wales has in the future. The population projection with zero migration anticipates a decrease in Wales' population. All the population projections that include migration anticipate an increased population, with higher migration levels resulting in higher population growth.

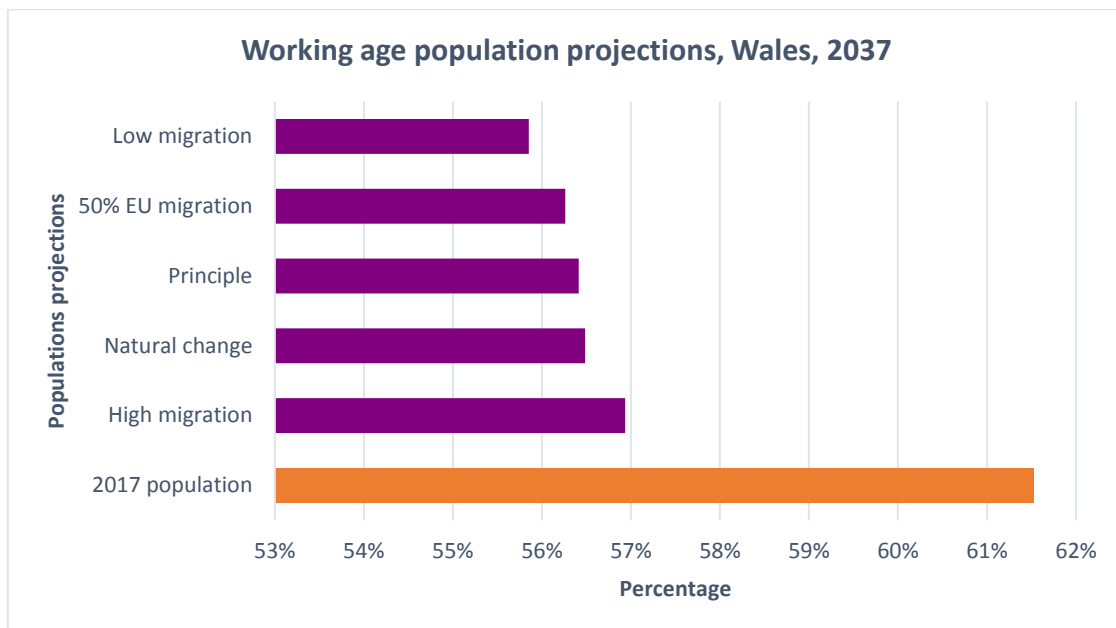


In each population projection, the percentage of people aged 65 or over is higher than in 2017, with the projected number of people aged 65 or over increasing over the next 20 years with all levels of migration used²⁵.



However, in each population projection variant used here, the percentage of the working age population and the number of people of working age in Wales is projected to be lower than in 2017, even when using the projection with a higher level of migration. As the level of

migration decreases (excluding natural change) the percentage of the population of working age drops, as seen in the graph below²⁶.



4. Conclusion

Wales' population has seen a significant increase over the last 20 years and is ageing quickly with an increase in the share of the population aged 65 years or over and a drop in those aged 20 years or younger.

Fertility and mortality, which make up the natural change element of population change, and migration are the main components of population change. Between 2016 and 2017 natural change in Wales was -874 so Wales' population did not grow naturally. Almost all of Wales' population growth was from net migration - 97 percent in total.

The vast majority of people moving in and out of Wales are of working age, most aged 15 to 24 years old showing young people to be more mobile than older people. Most of those coming into Wales from outside the UK came for formal study and were born outside of the EU, whereas those leaving Wales to go outside the UK left for employment and were UK born citizens.

Wales' future population is a complex issue, depending on forecast fertility and mortality as well as assumptions made about inflows and outflows of people, from within and outside the UK.

Without any migration, Wales' future population is set to decline and even with different levels of migration Wales' working-age population is set to shrink substantially and its older population is likely to rise markedly. If Wales wants to continue growing its population and minimise the reduction in the numbers of people of working age, it will need to look to immigration, both from within the UK and outside of the UK. This raises important questions about how decisions on immigration are made and who they are made by. The findings in this paper also raises key policy questions about future housing, the economy, health and ageing, education, local communities, the sustainability of the Welsh language and Wales' fertility in the future, that will all need to be investigated as Wales' population changes.

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