



The great British brain drain

An analysis of migration to and from Crawley

June 2017

Executive Summary

The economic performance of UK cities is increasingly dependent on the skills of their workforce. Cities across the UK face the challenge of both attracting and retaining high-skilled talent.

This briefing looks at the nature of migration and graduate mobility into and out of Crawley.

It finds that overall **Crawley lost people to most regions**. Between 2009 and 2015, the city lost people to all regions with the exception of London and this resulted in a net outflow of 2,300 people from the city.

The majority of these migration flows were between Crawley and the rest of the South East. 62 per cent of the people that moved out of Crawley remained in the South East, while 57 per cent of those moving into the city were from the rest of the region. This resulted into a net outflow to the rest of the South East.

It gained 22 to 30 year olds but lost people in all other age groups. Unlike other small cities, the number of 16 to 21 year olds leaving Crawley was greater than that of those coming into the city and this can be explained by the lack of a university campus. But it attracted 22 to 30 year olds and this group includes new graduates moving into the city for work.

The majority all young people who went to university stayed in the Greater South East. 75 per cent of those who moved remained in the Greater South East. When we look at cities, 27 per cent moved to London and 15 per cent moved to Brighton.

A third of Crawley's students returned to the city after graduation. Among UK cities without a university campus, only Slough, Basildon and Aldershot have a lower return rate than Crawley. For all these cities the pull of London is likely to explain this pattern.

But Crawley is very successful at attracting new graduates from elsewhere. 80 per cent of new graduates working in Crawley had no prior connection to the city. Almost half of these came from the Greater South East. When we look at which cities these new graduates came from, Brighton – 20 per cent – and London – 15 per cent – were the two largest contributors.

This means that Crawley gained new graduates. This gain took place despite the city not having a university campus and reflects the strength of its economy.

Crawley has a strong private sector. Among UK cities, it has the lowest share of new graduates working in publicly-funded services jobs and this indicates the strength of its economy. Crawley also had the highest share of new graduates working in the Logistics and Communication industry.

Introduction

The Great British Brain Drain investigates migration within the UK, specifically between cities.¹ It finds that movers tend to be more skilled than the population overall: degree holders represented 32 per cent of the population but 38 per cent of all the people that moved. The movements of these people vary. Younger degree holders tend to move larger distances with London attracting the largest share of these young graduates. In contrast, older degree holders don't tend to move as far and tend to remain within a commutable distance of the city they leave.

This briefing is a complementary piece of analysis to the main report, in which we look in detail at the nature of migration and graduate mobility into and out of Crawley. Firstly, it looks at overall migration patterns to and from Crawley, using resident-based data. Secondly, it looks specifically at the movements of students and new graduates to and from the city. Finally it looks at the new graduate labour market in the city. These two last sections use workplace based data.

Centre for Cities uses the Primary Urban Area (PUA) definition of cities. For Crawley this comprises of Crawley Local Authority. For more information visit: www.centreforcities.org/puas/.

The nature of migration to and from Crawley

This section combines migration data from the ONS and the Census to look at migration to and from Crawley by age and qualification.

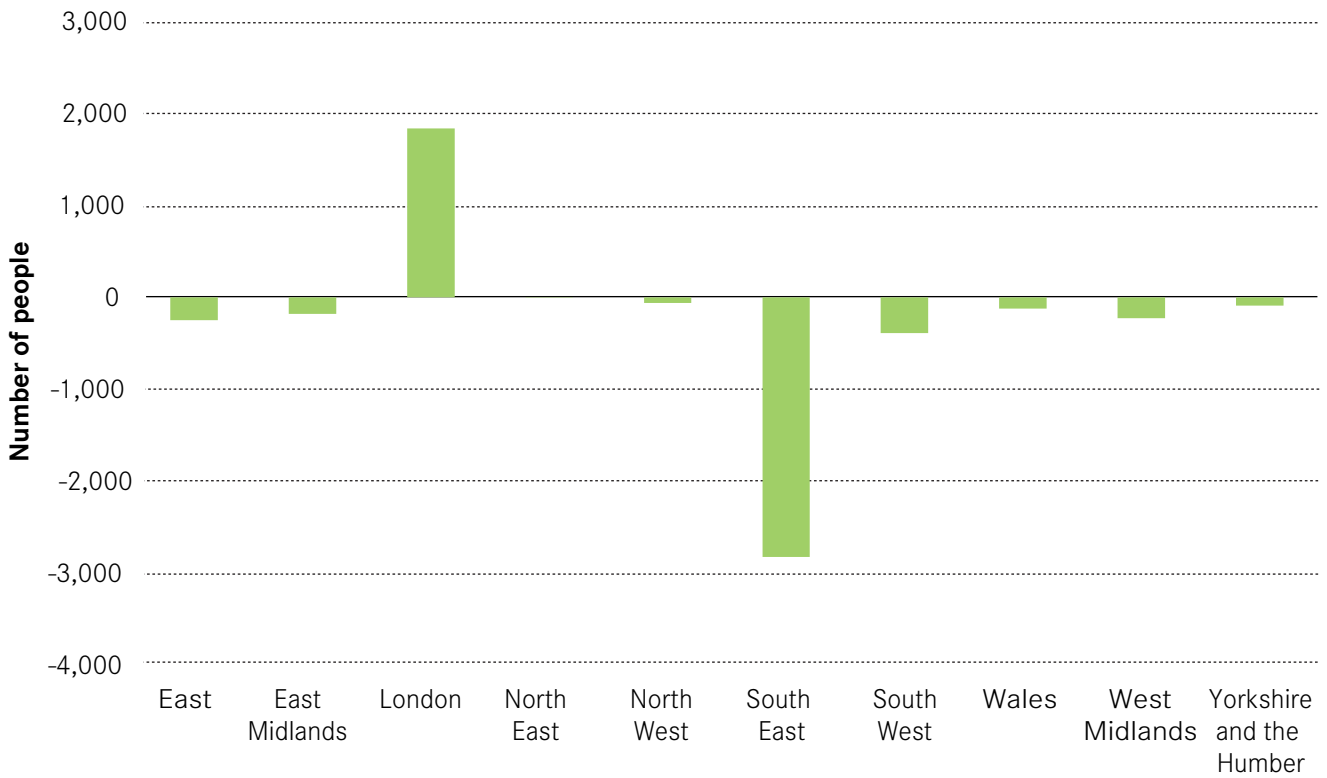
Most Migration was between Crawley and the rest of the South East

Between 2009 and 2015, 29,100 people moved into Crawley from the rest of England and Wales and 31,400 moved out. As a result there was a net outflow of 2,300 people from the city. In comparison, Bournemouth experienced the largest net inflow of all UK cities, equal to 15,100 people, and London experienced the largest net outflow of 340,300 people.

Much of this migration flow was between Crawley and the rest of the South East – 57 per cent of people moving into the city came from the South East and 62 per cent of those who moved out of Crawley remained in the region. The result was a considerable net outflow to the rest of the South East between 2009 and 2015, as shown in Figure 1. Beyond the South East, Crawley saw a net outflow to all other regions except London, from which Crawley saw a large net inflow.

¹ Swinney P and Williams M (2016), The Great British Brain Drain: where graduates move and why, London: Centre for Cities

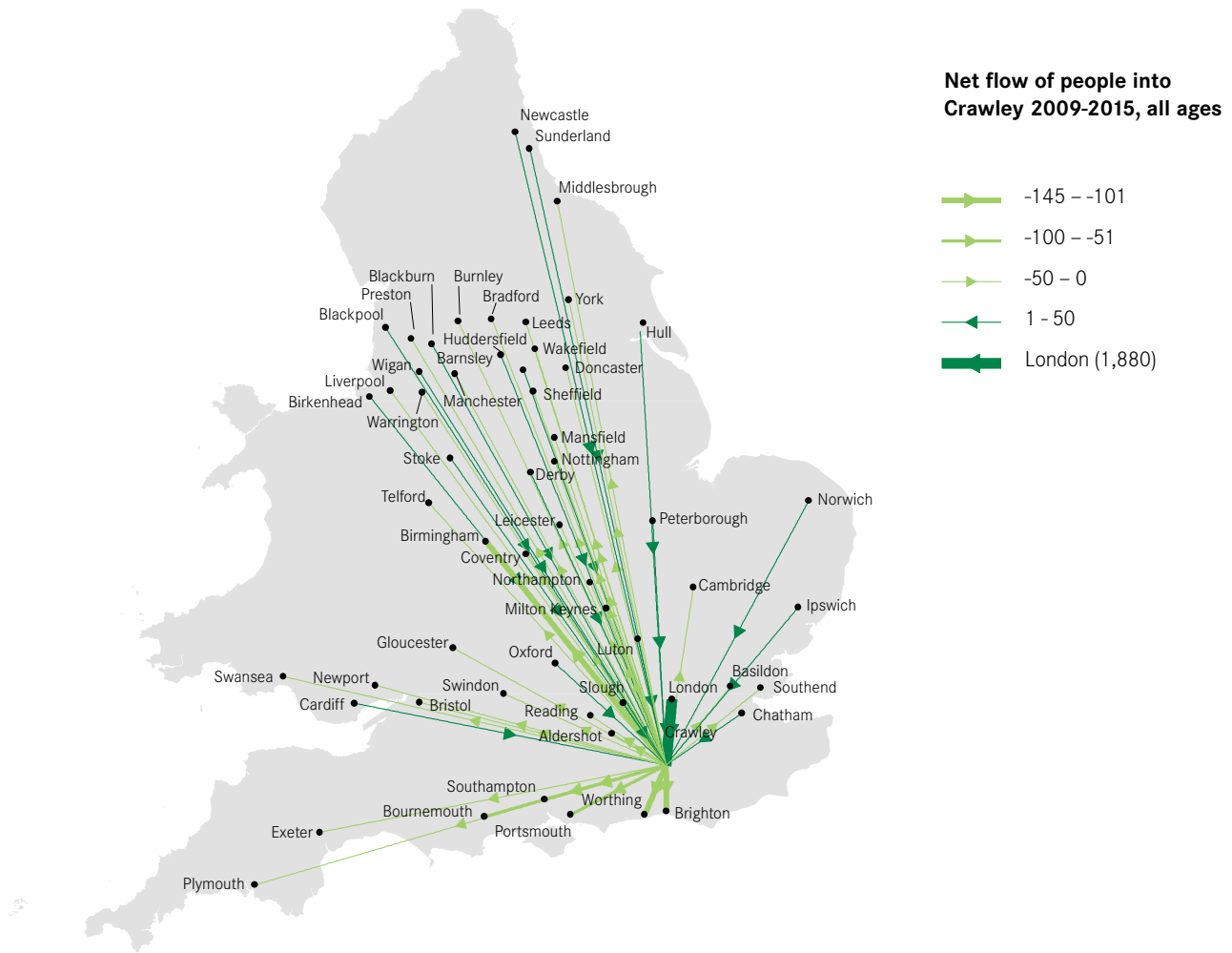
Figure 1: Net regional migration to Crawley, by region, 2009-2015



Source: ONS internal migration data, 2009-2015

On a city basis, Crawley saw its largest net outflows of people to Worthing and Brighton whereas the largest net inflow was from London. This highlights how the majority of migration took place between Crawley and its neighbouring cities (see Figure 2).

Figure 2: Net flows into Crawley, 2009- 2015



Source: ONS internal migration data, 2009-2015

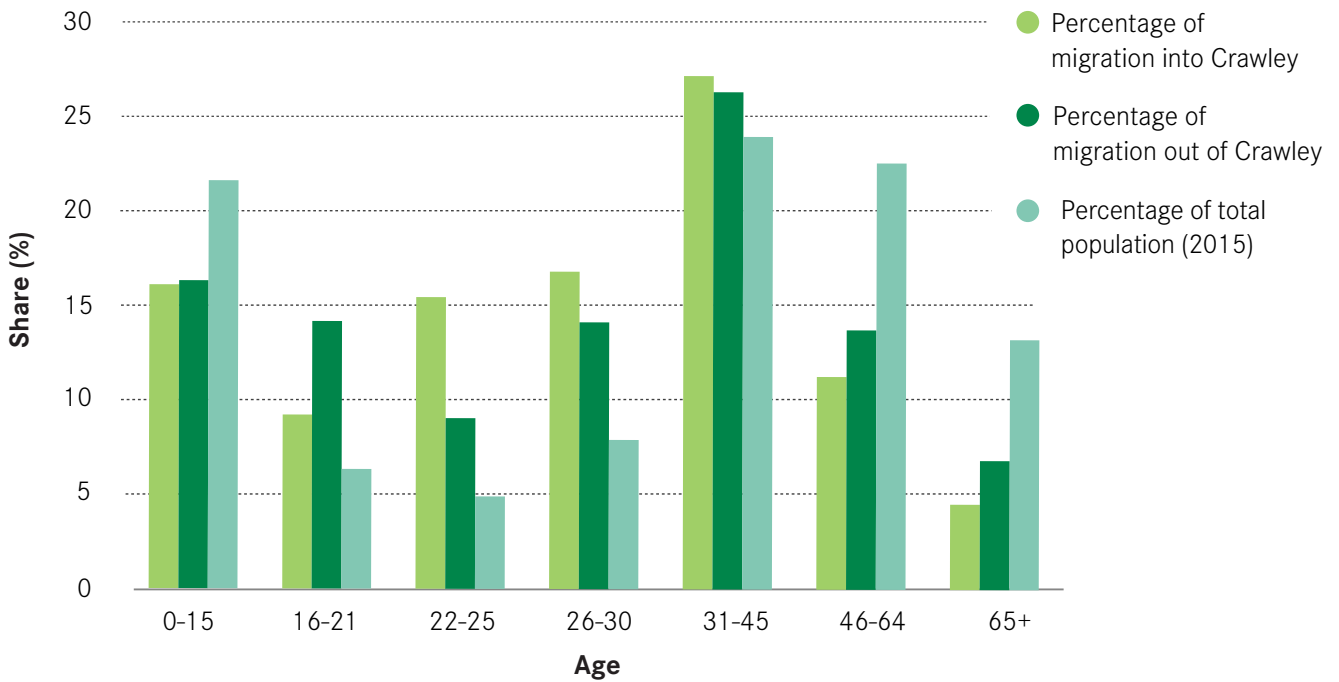
Crawley gained 22 to 30 year olds but lost people in all other age groups

The patterns of migration varied greatly when broken down by age. Figure 3 shows that:

- 16 to 21 year olds accounted for 9 per cent of inward migration, 14 per cent of outward migration but 6 per cent of the total population
- Inward migration to Crawley was more common than outward migration for 22 to 30 year olds
- 31 to 45 year olds accounted for the largest share of outward migration, 26 per cent, and also accounted for a large share of inward migration and population, 27 per cent and 24 per cent respectively

These patterns are very different to those seen in other small cities where inward migration is more common than outward migration for 16 to 21 year olds. In contrast, outward migration is more common than inward migration for 31 to 45 and 22 to 30 age groups.

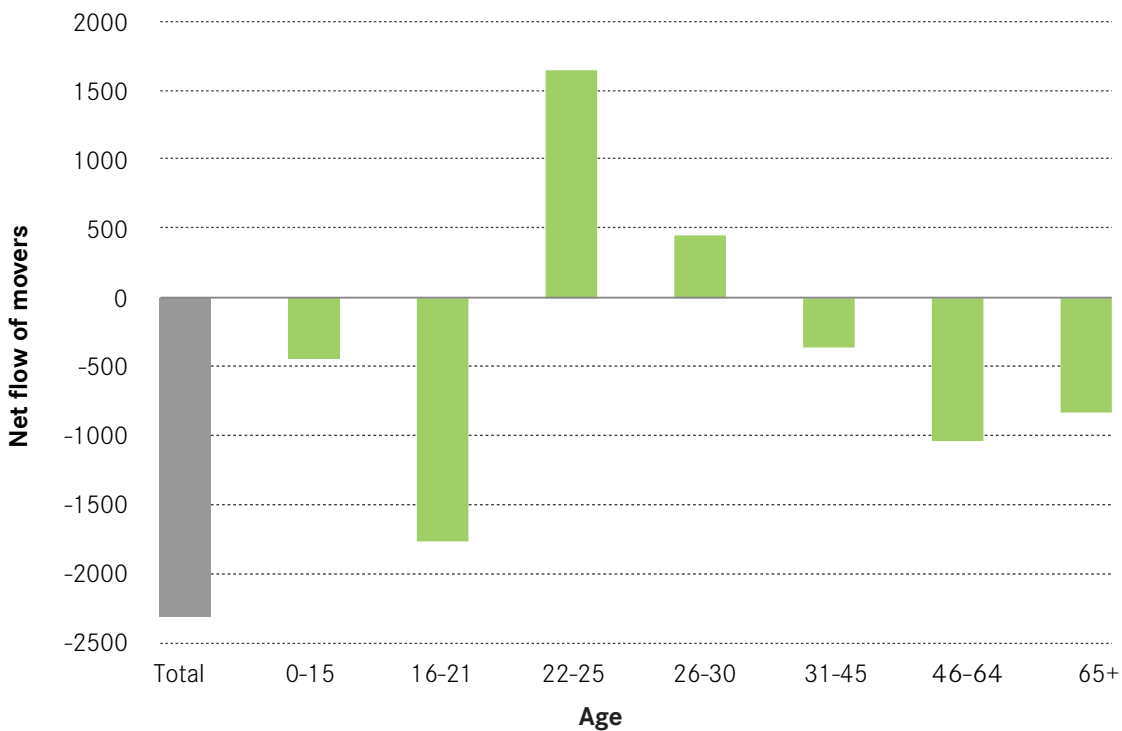
Figure 3: Contribution of each age group to migration and to the city's population, 2009-2015



Source: ONS internal migration data, 2009-2015, 2015 population

Overall, all age groups experienced a net outflow from Crawley except 22 to 25, and 26 to 30 year olds, as shown in Figure 4. For these age groups, the net inflows were equal to 1,650 and 450, respectively. The largest net outflow was of 1,760 16 to 21 year olds.

Figure 4: Net inflow of people to Crawley, by age, 2009-2015



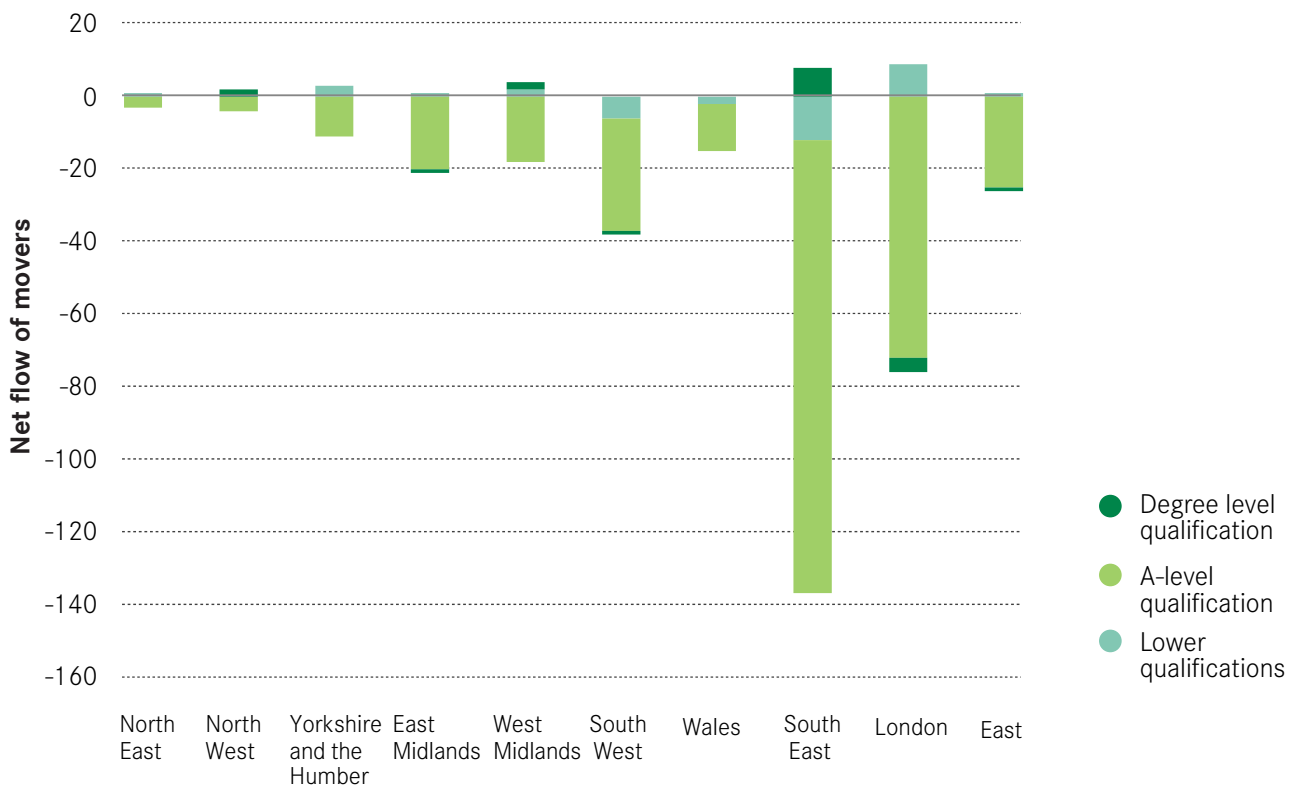
Source: ONS internal migration data, 2009-2015

Crawley loses young people with A-levels to all regions

While ONS data on migration does not give information on the qualifications of migrants, the 2011 Census provides us with this information for movers between 2010 and 2011. When the data is split into three age groups: 16 to 21, 22 to 30 and 31 to 45 year olds, three distinct trends emerge.

Crawley saw a net outflow of **16-21 year olds** to all regions in England and Wales. This was dominated by people with A-level qualifications, who most likely were moving for university. Figure 5 shows the resulting net outflow of these young people. The largest net outflow of people with A-level qualification occurred to the rest of the South East, London and South West. Interestingly, there were inflows of people in this age group with lower level qualifications from London, Yorkshire and the Humber and the North East.

Figure 5: Net flows of 16 to 21 year olds, by region and qualification, 2010-2011

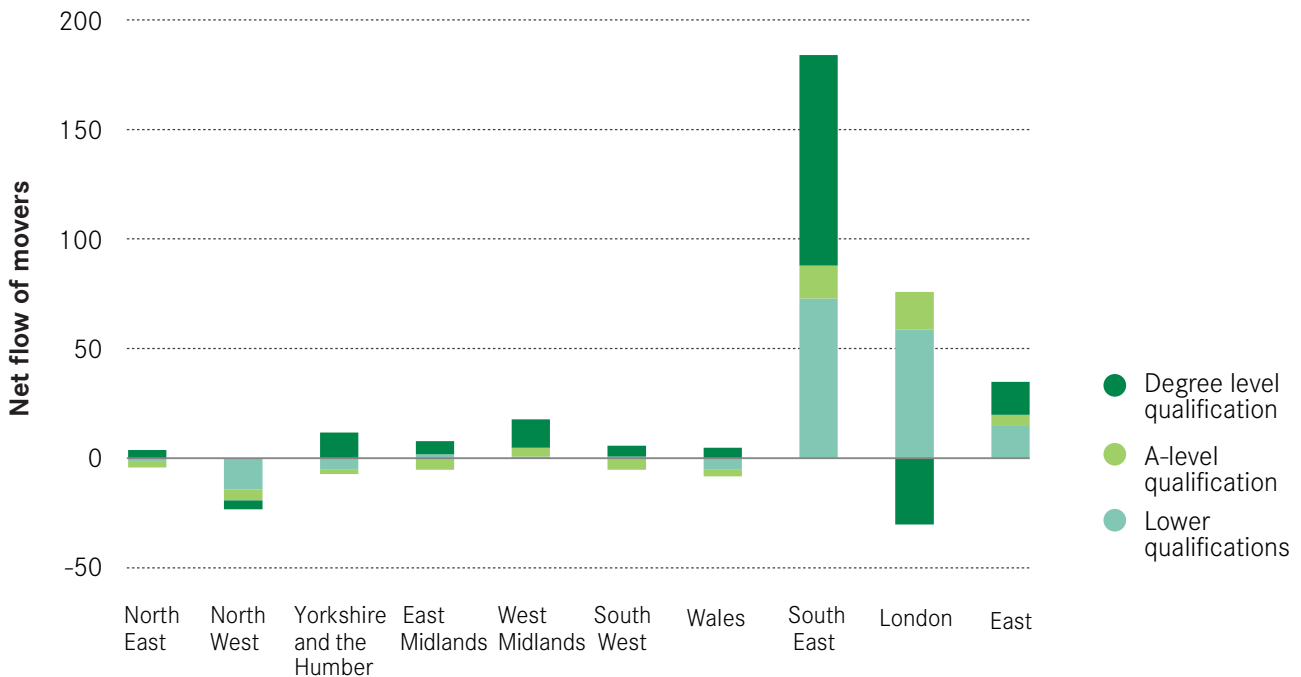


Source: Census 2011

Breaking the net inflow of **22-30 year olds** by qualification shows that the majority of these were degree holders.

The city gained degree holders from most regions and the largest net inflow of degree holders was from the rest of the South East. It also gained 22 to 30 year olds with A-level or lower qualifications from the rest of the region. Interestingly there were also small net outflow of degree holders to London and the North West. As Crawley does not have a university campus this might suggest that degree holders use the city as a stepping stone for jobs elsewhere.

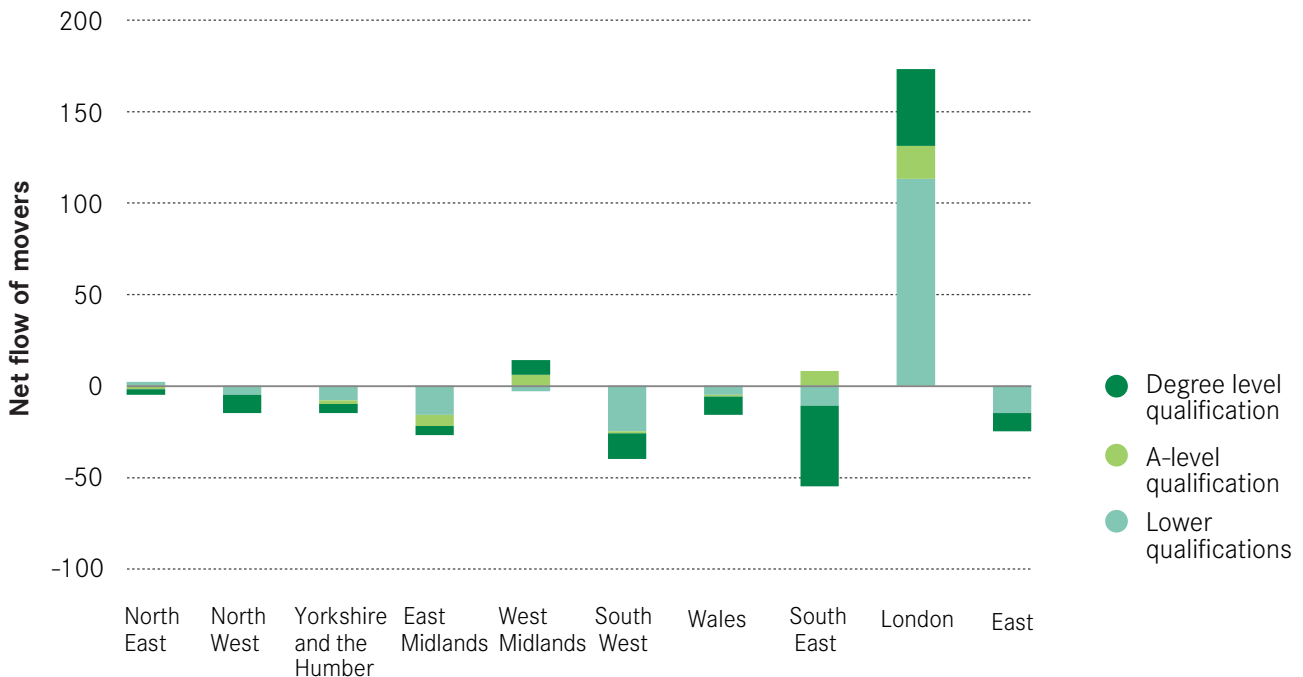
Figure 6: Net flows of 22 to 30 year olds, by region and qualification, 2010-2011



Source: Census 2011

While there was a net outflow of **31 to 45 year olds** to most regions, this was more than offset by the large net inflow from London. Focusing specifically on degree holders, Crawley lost people to all regions but gained degree holders from London. The city also gained 31 to 45 year olds with A- level or lower qualifications from the capital. This movement from London might have to do with the higher living costs in the capital and Crawley being an attractive place for young families.

Looking again at the wider migration data for 2009 and 2015, which allows us to look at the movement between local authorities, shows that the majority of the 31 to 45 year olds who left Crawley did not go very far. On a net basis, Mid Sussex was the local authority that Crawley lost most people to, followed by Horsham. This means that the movers remained within commutable distance to Crawley, even if they no longer lived there. The largest net inflow of older graduates to Crawley was from neighbouring Reigate and Banstead.

Figure 7: Net flows of 31 to 45 year olds, by region and qualification, 2010-2011

Source: Census 2011

Summary

Overall, Crawley experienced a small net outflow of people from the city between 2009 and 2015. Breaking this down shows nuance to the overall picture:

- There was a large outflow of 16 to 21 year olds from the city. Many of these are likely to have been students going to university, which is explored in the next section.
- The city experienced a net inflow of young people with a degree and this was driven by graduates moving in from the rest of the South East.
- There was a net outflow of degree holders aged 31 to 45. Those graduates who left Crawley did not tend to move very far. Meanwhile this outflow was almost offset by a net inflow from London.

A more detailed look at the movement of students and graduates

This section explores the migration patterns of students and graduates into and out of the city using two data sets from the Higher Education Statistics Authority (HESA). The first looks at admissions (for all students at university in 2014/15). As Crawley does not have a university campus, the focus will be on where Crawley's students moved to for university. The second is based on a survey of graduates six months after graduation (for leavers in 2013/14 and 2014/15). Unlike the ONS data used above, this covers the whole of the UK.

Almost half of all young people in Crawley who went to a UK university stayed in the Greater South East

If we look at where Crawley's students decided to study, the data shows that the majority of those who moved to study elsewhere did not go very far: 44 per cent of those who moved remained in the South East and 25 per cent moved to London (Figure 8).

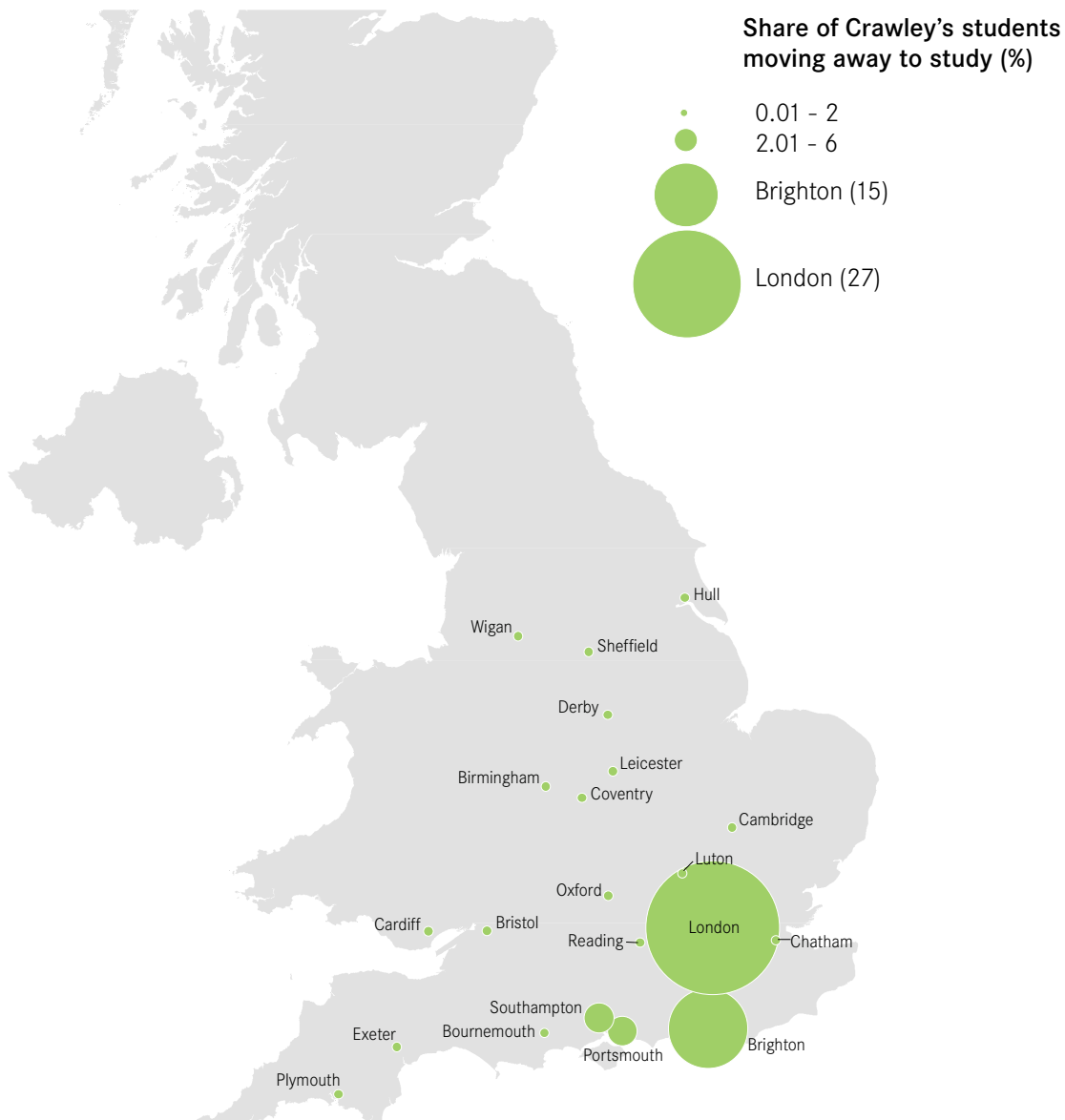
Figure 8: Destination of those moving away from Crawley for university, by region, 2014/15



Source: HESA Admissions Survey

If we look at the cities they moved to, 27 per cent of these movers went to study in London and 15 per cent of these moved to Brighton (Figure 9).

Figure 9: UK cities which Crawley’s students move to for university, 2014/15



Source: HESA Admissions Survey

Movements of new graduates post university

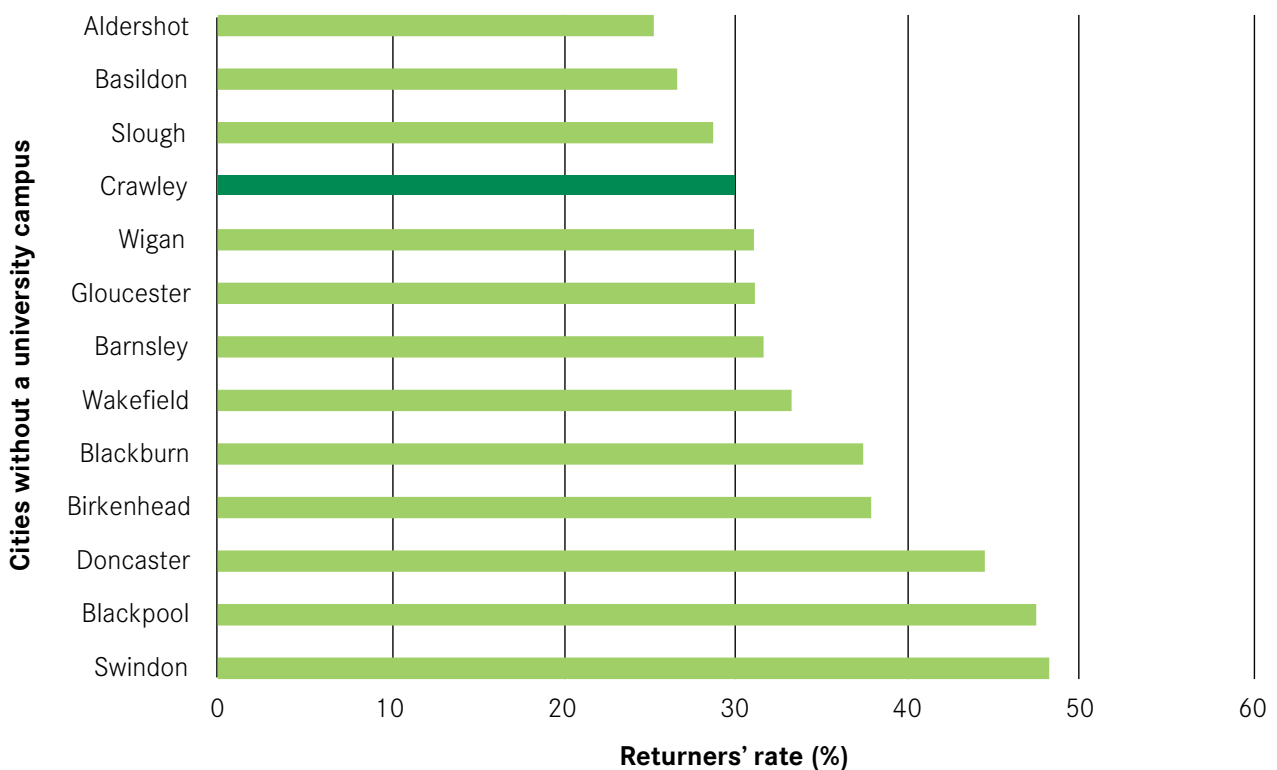
As Crawley does not have a university campus, the city needs to attract new graduates from elsewhere be that returners. These can either be that returners - those students that leave for university and return after graduation - or new graduates that move to the city for work. These two groups determine the size of the graduate workforce in the local economy.

A third of Crawley’s students return to the city for work

When we look at the number of students who left Crawley for university, only a third came back to the city after graduation. This is the 4th lowest return rate among UK cities; London had the highest one - 74 per cent.

Figure 10 compares the return rate in Crawley with the other 13 UK cities without a university campus: only Slough, Basildon and Aldershot have a lower rate than Crawley. Interestingly, all these cities are located in the Greater South East and in all more than a quarter of the students who do not return ended up working in London. This is not surprising given the capital’s attractiveness as a place to work.

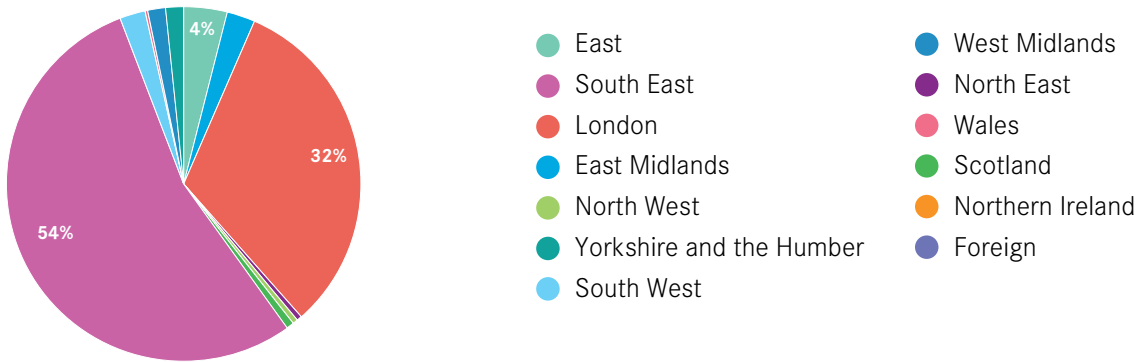
Figure 10: Share of returners for cities without a university campus, 2013/14 – 2014/15



Source: HESA Destination of Leavers Survey

Figure 11 shows the employment destinations of those students who did not return after graduation. The majority of these new graduates did not end up working very far from Crawley: 32 per cent worked in London and 54 per cent in the rest of the South East.

Figure 11: Employment destinations of Crawley’s students who do not return to Crawley after graduation, by region, 2013/14 – 2014/15



Source: HESA Destination of Leavers Survey

Looking on a city basis shows that London attracted over a third of these new graduates. Brighton was the second most popular destination, attracting 5 per cent (Figure 12).

Figure 12: Employment destinations of Crawley’s students who do not return to Crawley after graduation, by city, 2013/14 – 2014/15



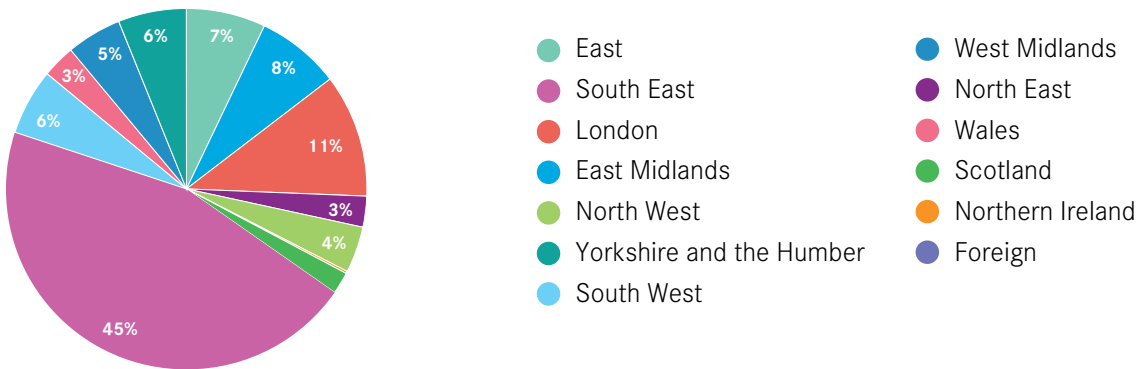
Source: HESA, Destination of Leavers Survey

More than half of those who move in for work come from the Greater South East

Another component of graduate migration comprises of those attracted into Crawley for the first time after graduation to work. While graduate retention figures tend to get a lot of attention, the ability of a city to attract in new graduates from elsewhere is an important part of increasing the number of degree holders in a city. For cities without a university campus, attracting new graduates is even more important. New graduates who moved to Crawley for work represented 80 per cent of the new graduate workforce, the highest share among the UK cities without a university campus, showing the success of the city of doing this.

Figure 13 shows the origins of those who moved into Crawley for work. The majority of these new graduates came from the rest of the Greater South East: 45 per cent came from the rest of the South East and 11 per cent from London.

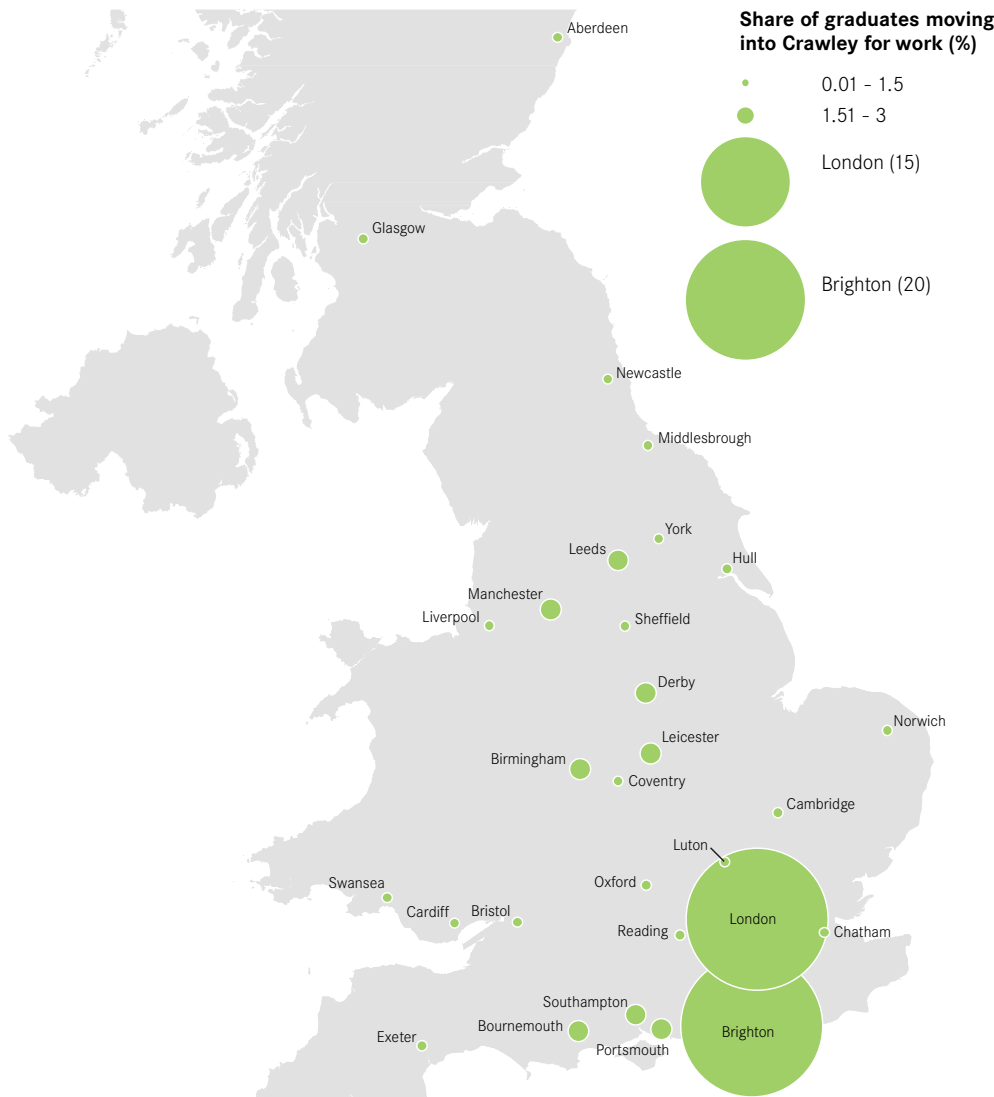
Figure 13: Origins of those who moved in to Crawley for work, by region, 2013/14 – 2014/15



Source: HESA, Destination of Leavers Survey

Figure 14 shows that a fifth of these new graduates who moved to Crawley for work came from Brighton. London was the second largest contributor to Crawley’s new graduates’ labour market – 15 per cent of this cohort came from the capital.

Figure 14: Origins of graduates who moved into Crawley for work, by city, 2013/14 – 2014/15



Source: HESA destination of leavers survey

If we look at the breakdown by institution, the largest share – 17 per cent – came from the University of Brighton. The second largest share – 5 per cent – came from the University of Chichester (Figure 15).

This meant that Crawley experienced a “new graduate gain”

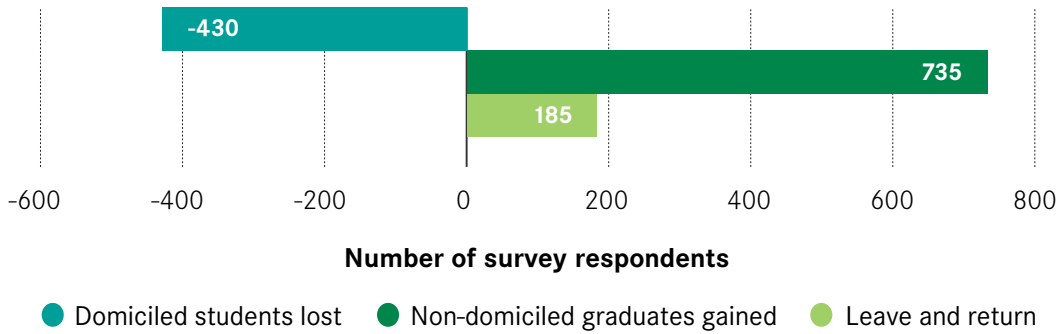
Figure 15: Origins of new graduates working in Crawley, by institution, 2013/14 – 2014/15



Source: HESA destination of leavers survey

Combining this data on student and new graduate moves shows that overall Crawley gained from these migration patterns. Between 2013 and 2015, 615 graduates who responded to the survey had left Crawley to go to university elsewhere. Of these, 185 returned after graduation. These returners were joined by 735 graduates who did not grow up in Crawley moved to the city for work (Figure 16).

Figure 16: Comparing students lost and graduates gained by Crawley, 2013/14 – 2014/15



Source: HESA destination of leavers survey

Overall this means that the city gained 920 new graduates. This gain occurred despite the city not having a university and reflects the job opportunities available. In the next section, we turn to look at new graduate job opportunities in Crawley.

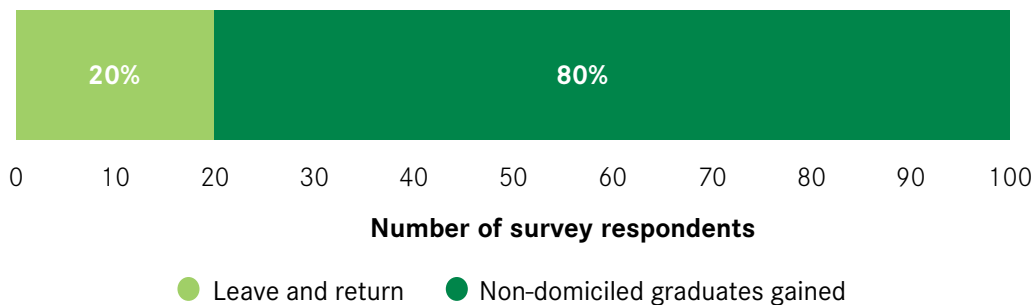
The nature of the new graduate workforce

This final section looks at the characteristics of the new graduate labour market in Crawley.

Four fifths of new graduates working in Crawley came from elsewhere and tended to be higher achievers.

Figure 17 brings together all graduates who decided to work in Crawley on graduation to provide an overview of the nature of the graduate workforce in the city. Four fifths of new graduate workers in Crawley came from elsewhere and 20 per cent of all new graduate workers moved away from Crawley for university and returned on graduation.

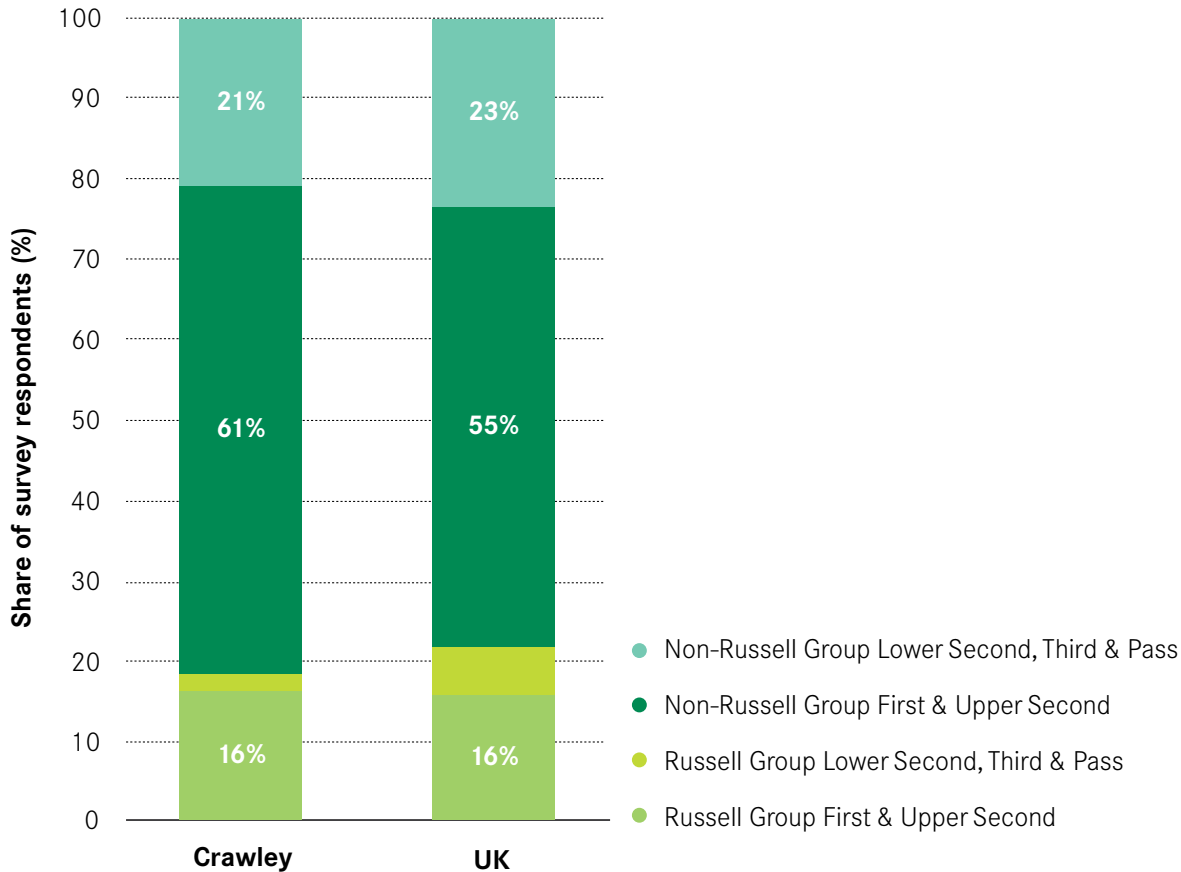
Figure 17: The components of the new graduate workforce, 2013/14 – 2014/15



Source: HESA destination of leavers survey

In terms of the class degree achieved, Crawley's graduate workforce had a higher share of graduates with a First or Upper Second Class degree than the UK as whole (Figure 18). Whilst it had the same percentage of new graduates with a Russell Group First & Upper Second as the UK average, it had a higher share of new graduates with a non-Russell Group First & Upper Second class degree – 61 per cent compared with 55 per cent.²

Figure 18: Share of working new graduates by class of degree, 2013/14 - 2014/15



Source: HESA destination of leavers survey

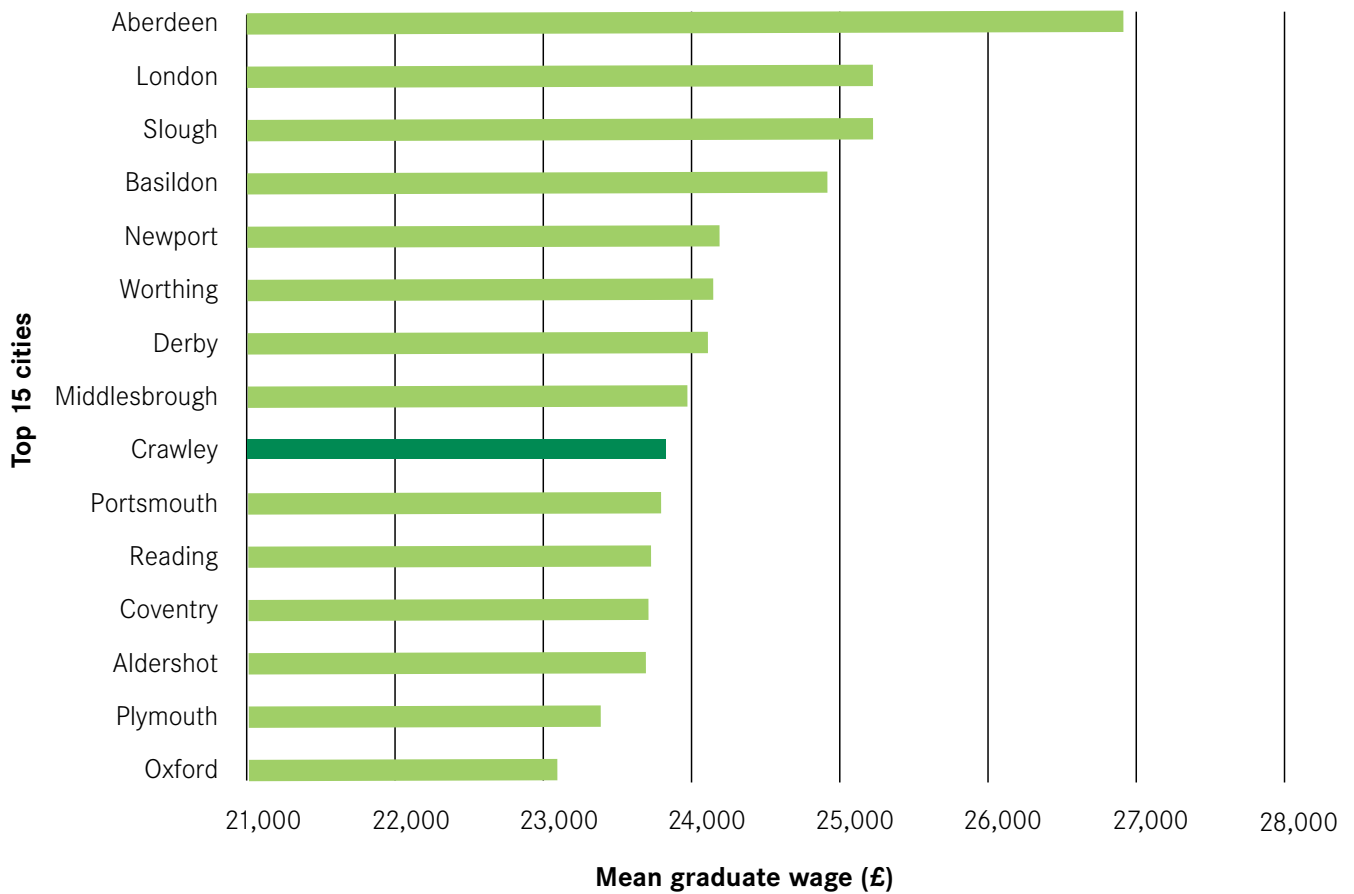
Graduates wages in Crawley

Graduates working in Crawley earned on average £23,800 a year, which was above the mean UK graduate wage of £23,100. This puts Crawley 9th out of all British cities, as shown in Figure 19.

However, analysis of UK graduates finds that graduates' wages was not the main reason why graduates choose their employment location.³ Other factors such as the type of jobs available in that city and the opportunities for career progression are more important.

² The Russell Group represents 24 of the UK's top higher education institutions and promotes excellent teaching and research. For full list of the institutions : <http://russellgroup.ac.uk/about/our-universities/>

³ Swinney P and Williams M (2016), The Great British Brain Drain: where graduates move and why, London: Centre for Cities

Figure 19: Mean new graduate wages of top 15 UK cities, 2013/14 – 2014/15

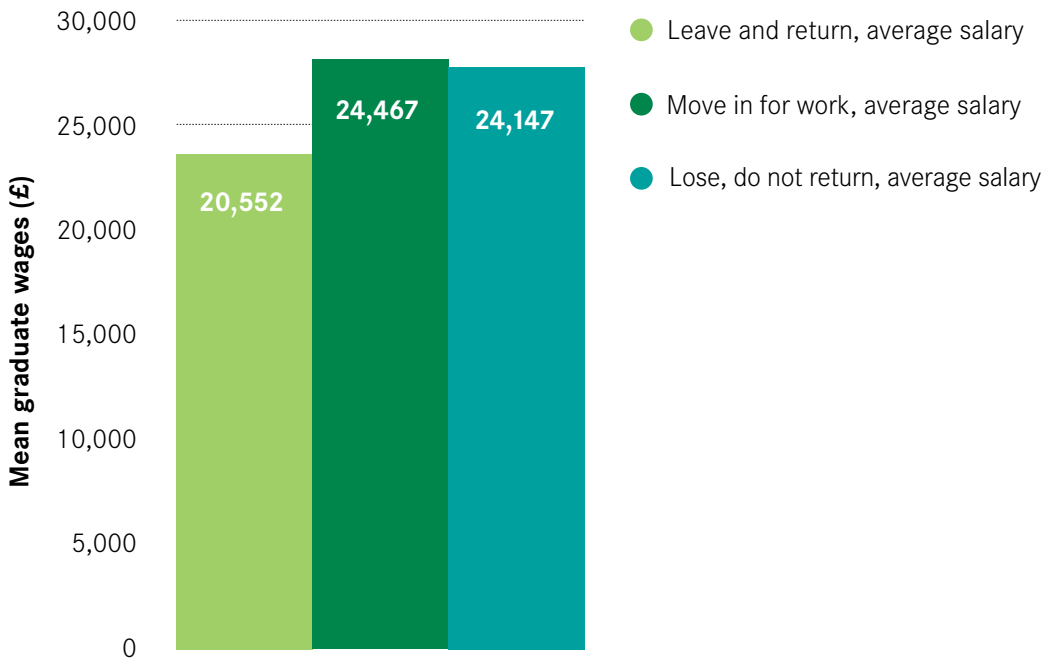
Source: HESA destination of leavers survey

Figure 20 shows the average wages for three migration groups: those who left Crawley for university and returned upon graduation; those who moved into Crawley for work but had no prior links to the city; and those who left Crawley for university and did not return.

The data shows that there were no significant differences in wages between those who moved into Crawley for work and those who left the city. Interestingly, there was a significant gap between these two groups and those who returned to Crawley after graduation. When we look at those who work in Crawley in terms of the class degree achieved, those who moved in for work were more likely to have a First or Upper second class degree from a Russell Group University (19 per cent) than those who returned to Crawley (3 per cent).

Those who had no prior links to Crawley were also less likely to have achieved a Lower Second, Third or Pass degree from a non-Russell Group University (17 per cent) than those who were originally from Crawley (34 per cent). This might partially explain the differences in wages. Non-economic reasons such as new graduates wanting to work in their hometown might also explain this trend.

Figure 20: Mean new graduate wages by migration groups, 2013/14- 2014/15

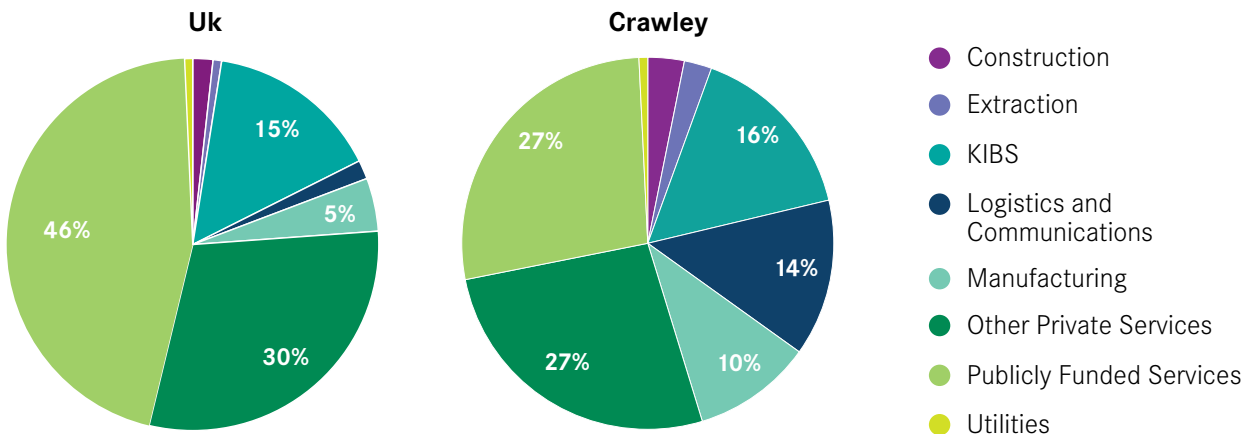


Source: HESA destination of leavers survey

Crawley has the lowest share of new graduates working in the public sector

Figure 21 shows that the largest share of new graduates working in Crawley - 27 per cent - were employed in publicly-funded services jobs. But this was the lowest share among UK cities and indicates the strength of Crawley’s private sector. Crawley had the highest share of new graduates working in the Logistics and Communication industry. Looking at a finer industrial breakdown shows that 7 per cent of new graduates were employed in air transport, not surprising given the size of Gatwick Airport. Interestingly, Crawley had the 6th highest share of new graduates working in manufacturing, while it also had the 14th highest share of new graduates employed in private knowledge intensive business services (KIBS).

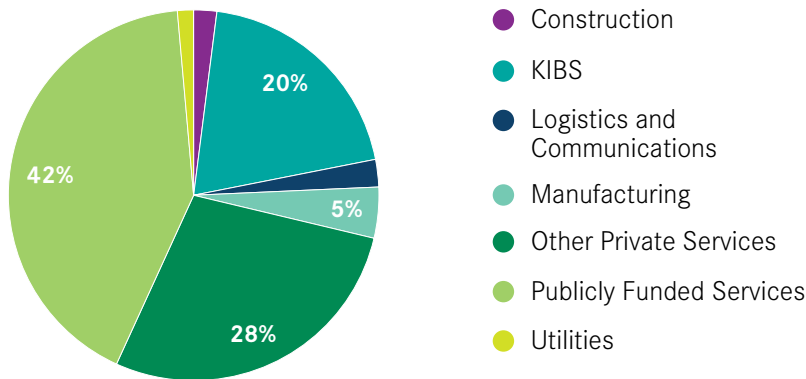
Figure 21: Share of graduates in Crawley working in each sector, 2013/14 – 2014/15



Source: HESA destination of leavers survey

In contrast, the picture of those graduates who did not return looked very different (Figure 22). A much higher share worked in publicly-funded services jobs although this was still lower than the UK average – 20 per cent of this group worked in KIBS jobs, higher than the national average and reflective of the flows of this cohort to London.

Figure 22: Share of students from Crawley working elsewhere in each sector , 2013/14 - 2014/15



Source: HESA destination of leavers survey

Conclusions

- Crawley gained graduates.** A net outflow of 16 to 21 year olds, many of which left to go to university, was followed by net inflow of 22 to 30 year old degree holders. Although only a small proportion of those students who had left returned to Crawley, the city attracted a significant number of new graduates for work with no prior links to the city. This resulted in a net gain of 920 graduates.
- The city attracted new graduates from the Greater South East.** The largest share of the new graduates working in Crawley had no prior links to the city, and this is higher than other cities without a university. Two thirds of these new graduates came from the rest of the Greater South East. This indicates that Crawley is an attractive place to work within this economically successful region.
- Its strong private sector facilitated this.** Crawley had the lowest share of new graduates working in the public sector and the largest share of new graduates working in Logistics and Communications of all UK cities. Its large private sector is likely to be a strong contributing factor to Crawley's success in attracting many graduates for work.

Centre for Cities is always keen to work in partnership with like-minded organisations who share our commitment to helping cities to thrive, and supporting policy makers to achieve that aim.

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