

Comparing the characteristics of migratory flows to Spain and other European Union countries

Article 06
07/08/2024

<https://doi.org/10.53479/37432>

Rationale

Spain has become one of the European countries with the highest inflows of immigrants relative to its population. This article compares the characteristics of immigrants to Spain with those to other European Union (EU) countries, by origin, gender, age, education and labour-market contribution.

Takeaways

- In Spain immigrants are mainly from Latin America and are a more homogeneous and culturally proximate group to the destination country than in other European countries. In general, they are older, have a higher educational attainment level and women account for a larger share.
- Since the global financial crisis, the average age and the educational attainment level of immigrants in the four main EU countries has risen, doing so more sharply in Spain.
- The participation rate of non-nationals residing in Spain is one of the highest in the EU and, unlike in other countries, it is higher than that of the nationals, meaning they contribute more to the increase in labour supply.
- Non-national workers tend to be concentrated in activities that do not require a high level of education, although recently there are indications of a slight shift to higher-qualified sectors.

Keywords

Immigration, non-nationals, demographic growth, employment, labour-market participation.

JEL classification

J6, J11, J21, J24, E24.

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COMPARING THE CHARACTERISTICS OF MIGRATORY FLOWS TO SPAIN AND OTHER EUROPEAN UNION COUNTRIES

Introduction

Migratory flows to Spain and the European Union (EU) have regained considerable momentum in recent years, after waning during the pandemic, and are contributing positively to population growth in Europe (see Chart 1.a). In the absence of such immigrant inflows, in 2022 the population would have declined in Spain, Germany, Italy and the Netherlands. Conversely, in France and Sweden, which have a higher fertility rate, the national population has continued to grow in recent years, albeit less so than the non-national population. The latest data, for April 2024, point to the national population continuing to decline in Spain and the total population increasing due to the contribution of non-national residents.

In the most recent period, Spain has become one of the main recipients of immigrants in the EU. Specifically, in 2022 Spain recorded one of the highest rates of immigration per thousand residents in the EU,¹ even ahead of Germany (see Chart 1.b), and was middle of the table – below Germany but above France and Italy – in terms of the share of non-national population (17.1%) (see Chart 1.c). In absolute terms, in 2022 Spain was the fourth destination country (behind the United States, Germany and the United Kingdom) for permanent-type immigrants,² (Organisation for Economic Co-operation and Development (OECD), 2023). The latest data on the main countries of origin of migrants to Spain³ point to the inflows remaining at high levels.

This article compares the migratory inflows to Spain with those to the three main EU countries (Germany, France and Italy) and to those countries that have traditionally been recipients of immigrants (such as Sweden and the Netherlands, among others). This article does not analyse outflows, which, in general, have been smaller.⁴

The data used are from different sources. First, the data on migrant inflows are from Eurostat's international migration statistics,⁵ while those on non-nationals residing in EU countries are from the population statistics compiled by Eurostat from the censuses and other national population

1 In 2022 the rate of non-national immigration in Spain was exceeded by that in countries with low populations (Malta, Luxembourg and Cyprus), that in countries affected by the inflow of Ukrainian refugees (Estonia, Czech Republic and Lithuania) and that in Ireland.

2 Some international organisations, such as the OECD, draw a distinction between permanent-type migration (labour, family and humanitarian migration) and non-permanent migration (temporary labour migration). The term "migrant" tends only to be used to refer to the former.

3 If we compare the last four quarters available (2023 Q2-2024 Q1) with annual data for 2021 and 2022, the inflow of immigrants from the top eight countries of origin is close to the 2022 figure and far higher than that of 2021 (see National Statistics Institute (INE), 2024).

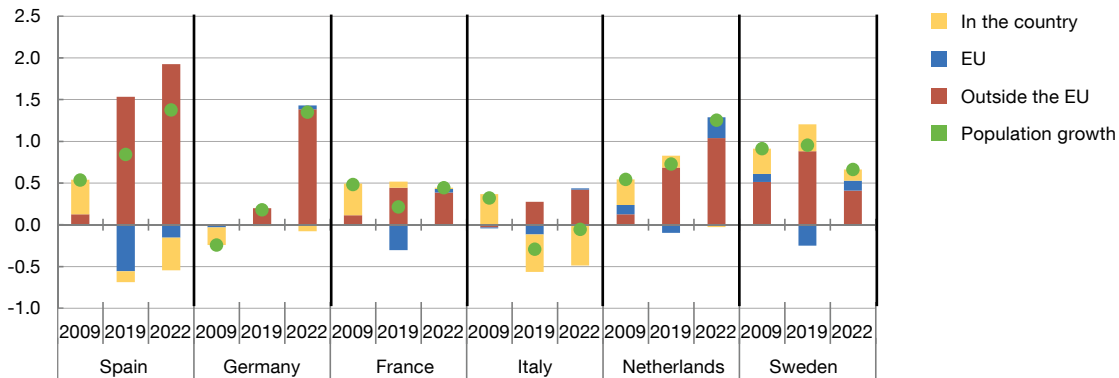
4 Outflows increased in Spain and several EU countries during the global financial crisis and after the restrictions on movement in 2021 and 2022 were lifted.

5 Eurostat defines international migrants as nationals and non-nationals who establish their usual residence in a different country for at least 12 months. Between the two criteria for identifying non-nationals (nationality and country of birth), this article identifies non-nationals as those persons born outside the country reporting the information.

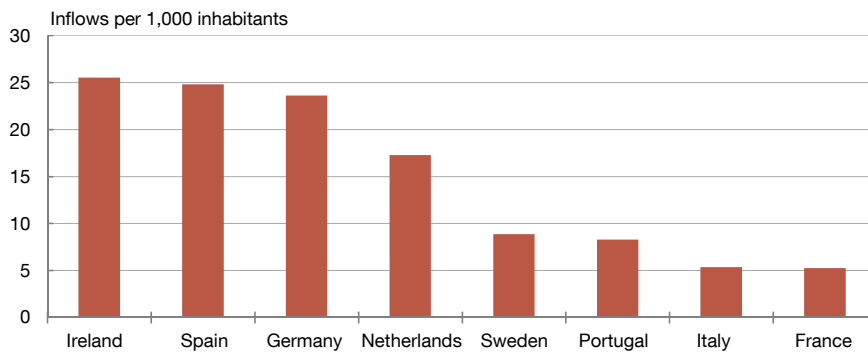
Chart 1

General characteristics of immigration in Spain and the EU (a) (b)

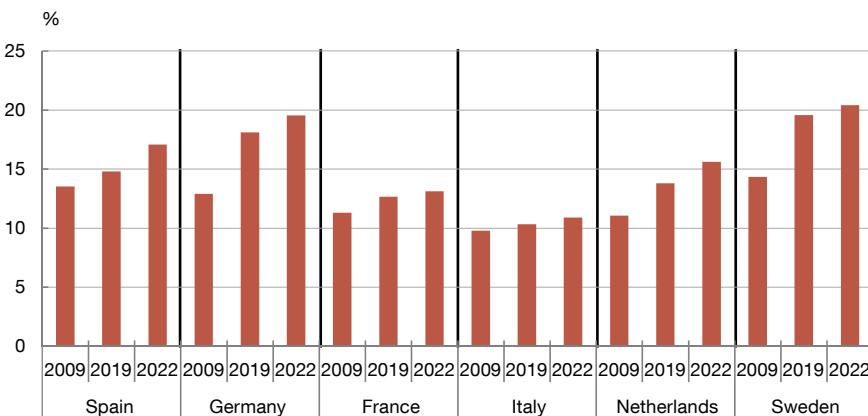
1.a Contribution to resident population growth in EU countries, by country of birth (c)



1.b Rate of non-national immigration in 2022 (c) (d)



1.c Non-nationals as a percentage of resident population (c)



SOURCES: Eurostat (International migration statistics and Demography, population stock and balance) and Banco de España.

- a A non-national is defined as an individual born outside the country.
- b 2022 was marked by two extraordinary events: the arrival of immigrants who had not been able to emigrate in the previous two years owing to the pandemic restrictions, and the inflow to the EU of a large number of refugees from the war in Ukraine.
- c The population figures refer to 1 January of the following year. The breakdown by country of birth is available from 2009.
- d The non-national immigration rate is measured as the inflow of non-nationals per thousand residents in the country.



registers. Second, we also use European Labour Force Survey (LFS)⁶ macro data on the employment and participation rate of national and non-national workers, in addition to LFS micro data to examine certain characteristics (sector of activity and educational attainment level). When using the latter, the non-national workers analysed are those who have resided in the country for up to a year, in order to proxy inflows.

To analyse any potential changes over time, this article compares the latest available data⁷ with the situation in pre-pandemic years – generally 2019 – and with the pre-global financial crisis period, although 2008 is the first year available for many of the characteristics analysed. In any event, it is important to highlight that the statistics on migratory flows have only just started to be harmonised in recent years, which conditions the comparisons over time and by country. In addition, the extraordinary nature of the period (2020-2022), marked by the impact of the pandemic and the restrictions on movement and Russia's invasion of Ukraine on migratory flows, should also be borne in mind.

Immigrant characteristics: origin, gender, age and educational attainment level

The origin of immigrants entering the EU varies considerably depending on the destination country, and these differences tend to persist over time. In Spain, as in Italy and Sweden, immigrant inflows from outside the EU predominate, accounting for between approximately 60% and 80% of total inflows since this data became available (see Chart 2.a). By contrast, in countries like Germany and the Netherlands, less than 50% of immigrants are from non-EU countries, except for at very specific times, such as 2015 (arrival of refugees from the war in Syria) and 2022 (refugees from Ukraine).

In the case of Spain, immigrants from South America, Central America and the Caribbean – mostly Spanish-speaking – account for 50% of the total inflow and almost 65% of non-EU migrants in the pre-pandemic years (2017-2019) (see Chart 2.b).⁸ This represents an increase in their share of inflows of some 10 percentage points (pp) compared with the pre-2008 financial crisis situation, with such rise steepening in 2022 (to 14 pp, using data that exclude the inflows of Ukrainian refugees). Sociocultural ties to Latin America and sharing the same language make Spain the preferred European destination for immigrants from that region. By contrast, the share of immigrants from the EU, Africa and Asia in total inflows to Spain fell between 2008 and the pre-pandemic years (by around 12 pp from these three areas as a whole), and this pattern continued in 2022.

In other countries with a high percentage of migrants from outside the EU, such as Italy and Sweden, their origin is more varied and there is more cultural and linguistic distance between the

6 The LFS is the harmonised European equivalent of the *Encuesta de Población Activa* (EPA) in Spain. Some facets of the data in the latter may differ from those in the LFS for Spain, given the harmonisation criteria established by the European survey.

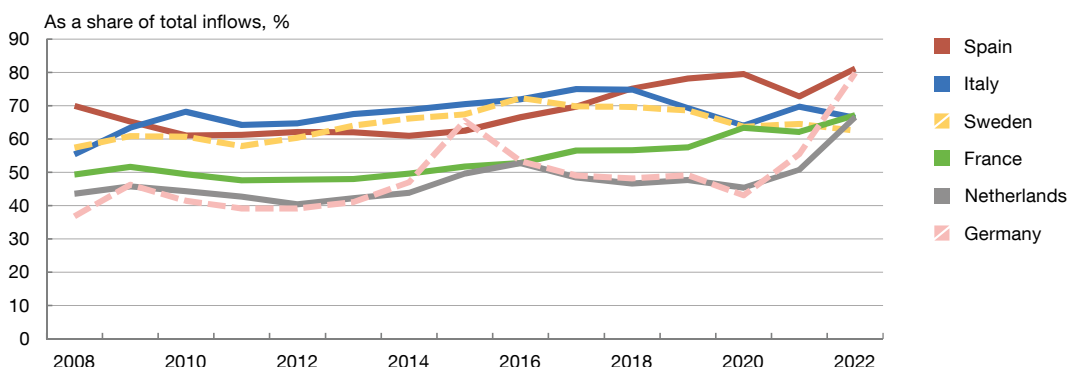
7 In the flow statistics and the LFS, 2022 is the latest available year, while for the employment data it is 2023.

8 In 2022 (latest figure available), the distribution, by geographical area, of the origin of migrants is highly influenced, in some countries, by the impact of the Ukrainian refugees. Therefore, we present data for the pre-pandemic years, which reflect more faithfully the more structural differences in immigrants' country of origin across destination countries. In addition, the comparison with Germany and France is not possible because, in both cases, the information is only available by distinguishing between whether the country of origin is an EU or non-EU country.

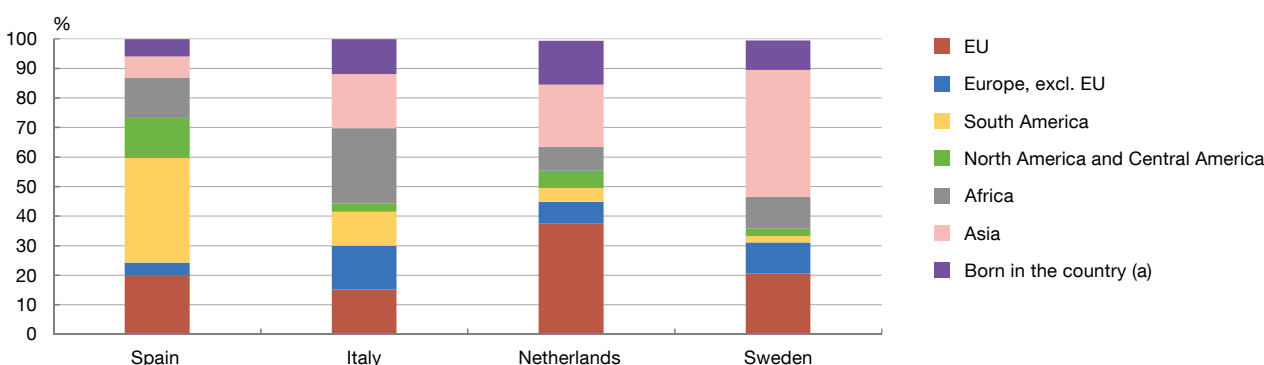
Chart 2

Origin of immigrants (a)

2.a Immigrants from outside the EU (b)



2.b Immigrant inflows (2017-2019). Distribution by region of origin (c)



SOURCES: Eurostat (International migration statistics) and Banco de España.

- a Nationals returning as residents are included as immigrants.
- b 2022 was marked by two extraordinary events: the arrival of immigrants who had not been able to emigrate in the previous two years owing to the pandemic restrictions, and the inflow to the EU of a large number of refugees from the war in Ukraine.
- c For France and Germany, there is no breakdown by region of origin.



country of origin and the destination country. For instance, in the pre-pandemic years 25% of migrants to Italy came from Africa, 18% from Asia, 15% from America and 15% from non-EU European countries. In Sweden, migrants of Asian origin account for the highest share (43%), although the geographical areas from which they originate are highly varied (mainly the Middle East and Southeast Asia) socially and culturally.

As for the distribution by gender, Spain stands out as the destination country with the highest percentage of female immigrants (50.5% in the pre-pandemic years and 49% in 2022, if we exclude Ukrainian immigrants), a relevant feature due to women’s important contribution in child and elder-care activities.⁹ By contrast, in other EU countries women account for less than 50%

⁹ In the years leading up to the financial crisis, the arrival of female migrants facilitated an increase in Spanish women’s labour-market participation (Cuadrado, Lacuesta, Martínez and Pérez, 2007) and helped reduce the motherhood pay gap (Castellanos, 2023). Population ageing and the shift in preference towards in-home care, as opposed to in nursing homes, constitute a structural increase in the demand for caregiving (Harris and Marshall, 2024).

(see Chart 3.a).¹⁰ This is because of the geographical composition of immigrants' country of origin. For instance, among the migrants from Africa, Asia and other EU countries, the percentage of women is very low, especially in the case of Africa. By contrast, it is above 50% among immigrants from America (International Organization for Migration, 2024), the main origin of immigrants to Spain.

The distribution by age of non-national immigrants entering Spain indicates that, in the period for which this information is available, their average age (32 in 2019) is higher than that of immigrants to Germany (29.1 in the same period) and France (26.9), and similar to that of those entering Italy (31.9). The share of non-nationals aged 50-64 and of those of retirement age (over 64) is higher in Spain, while the young adults cohort (15-29) accounts for a lower share in Spain than in France and Germany (see Chart 3.b). Overall, the share of migrants to Spain who are of working age (15-64) is at the midpoint of the range of values for the EU (see the following section). In the period 2013-2019 immigrant inflows to Spain shifted slightly towards higher age groups, while in the three other countries the share of young adults (15-29) declined. These changes were more pronounced in Spain. This is largely because of an increase in the over-50s age groups among migrants from the EU.¹¹ The age distribution in the period 2020-2022 was affected by the impact of the pandemic and the inflow of refugees from Ukraine. Thus, the average age of immigrants to Spain, which had increased slightly between 2013 and 2019 (from 31.8 to 32), rose to 35 in 2021 and fell to 33.2 in 2022.

The average age of the non-national population residing in Spain increased between 2013 and 2019 (from 37.9 to 40.7), doing so somewhat less over the last three years (40.8 in 2023). This is due to the ageing of the immigrants that arrived in prior years and to changes in the age of the new immigrants described in the previous paragraph. However, as in Italy, the average age of non-nationals remains lower than that of resident nationals (44.3 in 2023), whereas in Germany, France, the Netherlands and Sweden the average age of non-national residents is higher than that of the nationals. In Spain and Italy the non-national population has the lowest average age of the countries analysed, which could be the result of having recorded considerable migratory flows in the most recent years.

According to the latest LFS data (for 2022), non-nationals¹² entering Spain had a higher average educational attainment level than those entering Germany and Italy. Those with a high level (tertiary education) accounted for 43% in Spain, 38% in Germany and barely 15% in Italy, while those with a low educational attainment level accounted for 30% of inflows to Spain, less than in

10 The inflow of refugees from Ukraine in 2022, of which women accounted for a high share, influences the distribution of immigrants by gender in that year. For example, women accounted for 51% of immigration to the Netherlands in 2022, and 47% if we exclude Ukrainian immigrants, compared with the pre-pandemic average (48.5%). The chart depicts the average information for these years, as we consider it better reflects the cross-country differences in immigrants' gender.

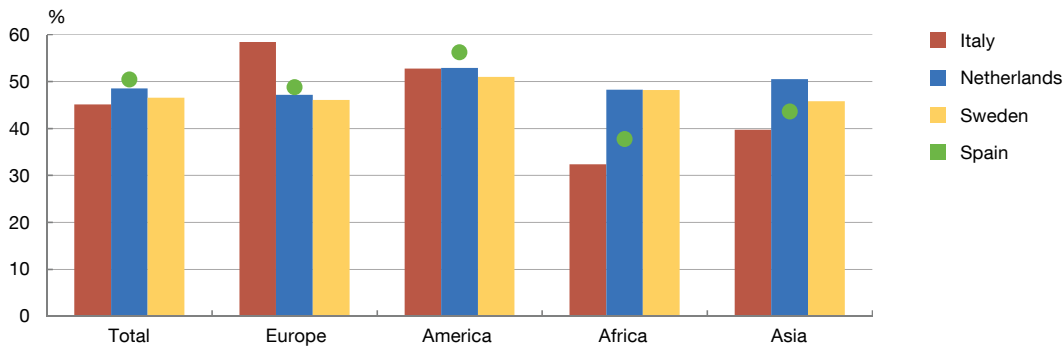
11 There is also a shift towards older age groups in Italy and France, which is concentrated in immigrants from the EU. In Germany this increase mainly stems from non-EU immigrants.

12 To characterise the educational attainment level of non-national immigrants, because of the lack of cross-matched data on their country of birth and educational attainment level, we use information on the non-nationals that have resided in the destination country for up to one year provided by LFS micro data, which is typically used to proxy the characteristics of the inflow of non-national immigrants.

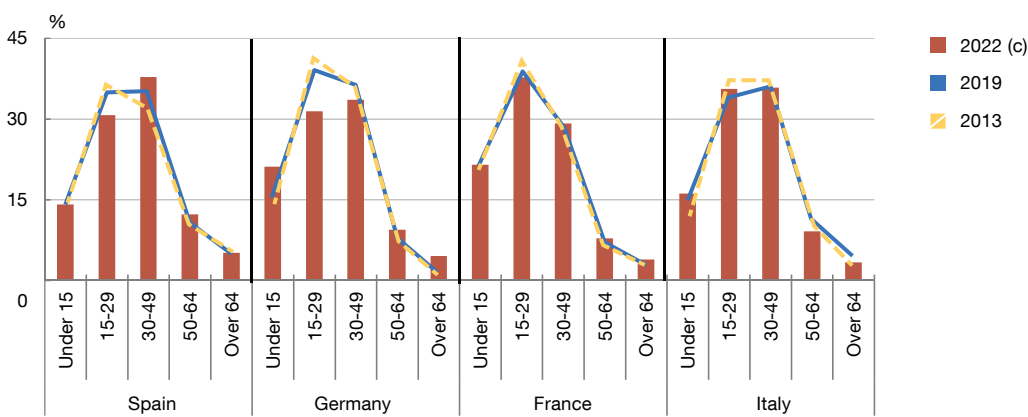
Chart 3

Profile of immigrants entering Spain and EU countries (a)

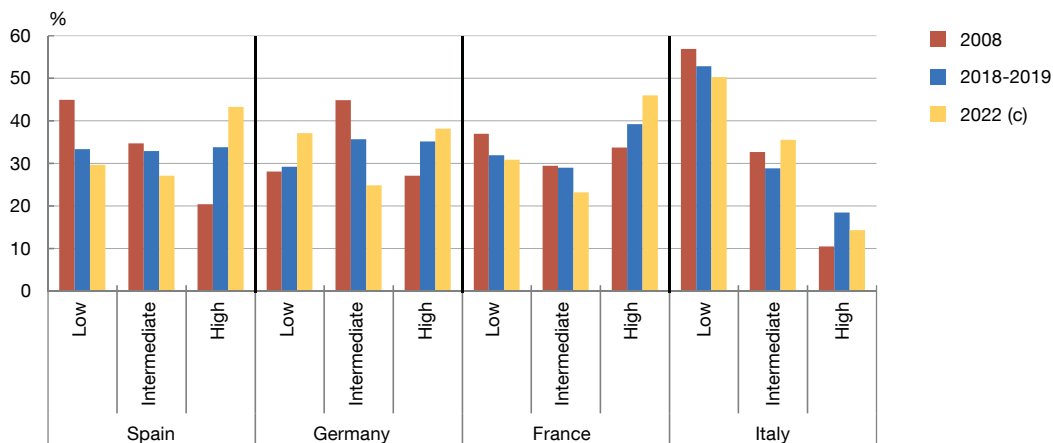
3.a Share of women in immigrant inflows (2017-2019) (b)



3.b Distribution of immigrant inflows, by age group



3.c Distribution of newly arrived non-nationals of working age, by educational attainment level (d) (e)



SOURCES: Eurostat (International migration statistics and LFS) and Banco de España.

- a A non-national is defined as an individual born outside the country.
- b There is no breakdown by region of origin for France and Germany.
- c 2022 was marked by two extraordinary events: the arrival of immigrants who had not been able to emigrate in the previous two years owing to the pandemic restrictions, and the inflow to the EU of a large number of refugees from the war in Ukraine.
- d A newly arrived non-national is defined as an individual born outside the country who has resided in the country for less than a year.
- e The LFS envisages three levels of education. The highest category includes levels 5 to 8 of the International Standard Classification of Education 2011 (ISCED 2011), or from short-cycle tertiary education, including third-cycle vocational training. The intermediate category of educational attainment includes levels 3 to 4 of this classification or secondary school education, with or without direct access to tertiary education, and the lowest category covers levels 0 to 2, up to secondary school education.



Germany (37%) and Italy (50%) (see Chart 3.c). By contrast, in 2022 the average educational attainment level of migrants to France was slightly higher than that of those to Spain. If we distinguish between EU and non-EU immigrants, the average educational attainment level of the former is higher. In 2022 more than one-half of EU immigrants in Spain had the highest educational attainment level, versus one-third in France and Germany and barely 8% in Italy. Among non-EU immigrants, a large majority (almost half) had a high educational attainment level in France and these were also the largest group in Spain and Germany (40%), while they were much smaller in Italy (15%).

Comparing this situation with that of prior years, we observe that the educational attainment level of the non-nationals entering these countries has risen. This increase has been particularly pronounced in Spain, which between 2008 and 2022 saw a decline of 15 pp in the percentage of immigrants with a low educational attainment level (from 45% to 30%) and an increase of over 20 pp in those with a high level (from 20% in 2008 to 43% in 2022).¹³

In terms of stocks, these recent dynamics have helped raise the educational attainment level of the non-national population residing in these four countries, although such level remains below that of the nationals. Specifically, tertiary-educated non-nationals in Spain increased from 21% in 2008 to 28% in 2022, versus an increase in the same period of 25% to 33% in the case of Spanish nationals.

Labour-market participation of immigrants

Inflows of immigrants to the EU have given a boost to the labour force of recipient countries, since the vast majority of migrants are in the 15-64 age group. Around 80% of those who arrived in Spain in the period 2012-2022 were of working age, at the midpoint of the range of values for other European countries (see Chart 4.a). However, there are marked differences in the labour-market participation rate of non-nationals residing in Spain and in other EU countries. In 2023, the participation rate of non-national residents in Spain (78%) was one of the highest in the EU, above those observed in Germany (73%), Italy (71%) and France (70%). Moreover, unlike most EU countries, where the participation rate of the non-national population is lower than that of the national population, in Spain and Italy it is higher, although the positive differential has decreased since 2008 (see Chart 4.b).

Thus, bearing in mind that a large share of migrants to Spain are of working age and that their participation rate is not only one of the highest in Europe¹⁴ but also exceeds that of Spanish

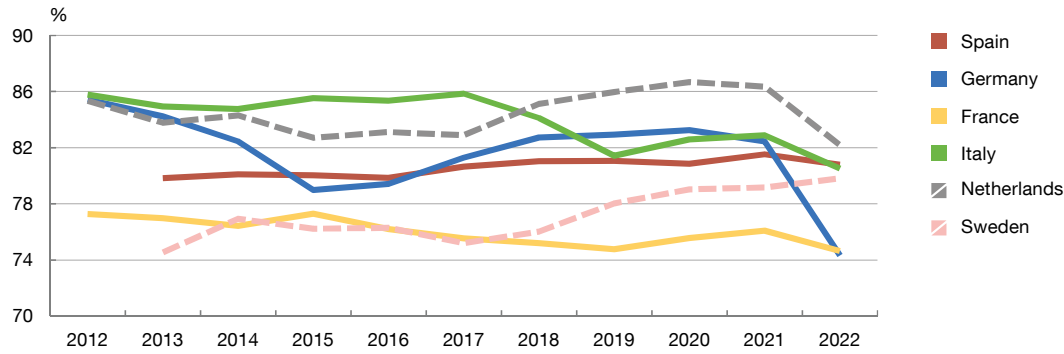
13 Banco de España (2024) also refers to the educational attainment level of immigrants in Spain. However, the criteria and data used are different, as it does not include a comparison with other European countries. Specifically, Banco de España (2024) considers the percentage of non-nationals with a university education – a narrower category than the tertiary education category used in this article – that had resided in Spain for less than one year in 2023, whereas this article reflects the situation a year earlier (2022) of non-nationals with a tertiary (university and third-cycle) education who had resided in the destination country for up to 12 months. In addition, the aforementioned publication used EPA micro data, which can differ from those of the LFS, the harmonised European survey used in this article to compare European countries.

14 The high participation rate of non-nationals residing in Spain is largely explained by the participation rate of women from outside the EU (71% in 2022), which is higher than in other European countries (62% in the euro area in 2022).

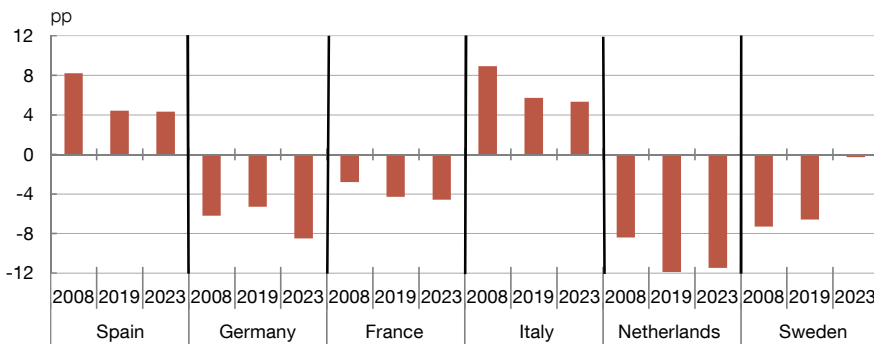
Chart 4

Labour-market contribution of immigrants

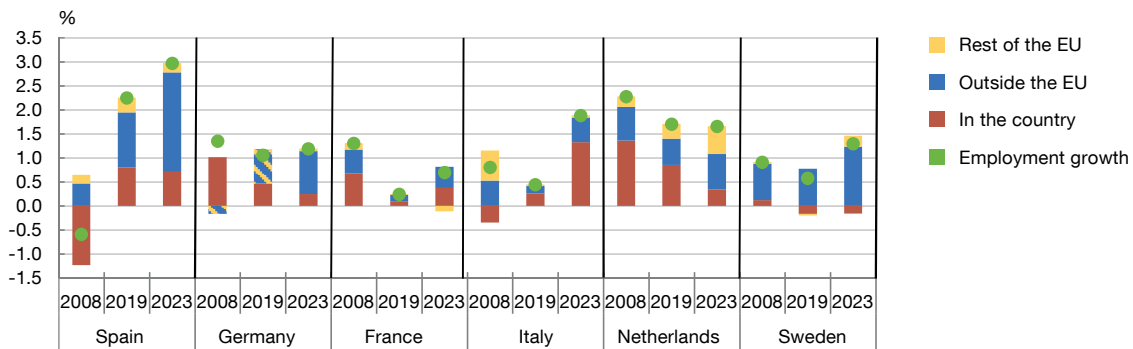
4.a Immigrants of working age as a share of immigrant inflows (a) (b)



4.b Participation rate differential between resident non-nationals and nationals (b)



4.c Contributions to employment growth, by country of birth



SOURCES: Eurostat (International migration statistics and LFS) and Banco de España.

- a Working-age group: those aged 15-64.
- b A non-national is defined as an individual born outside the country.

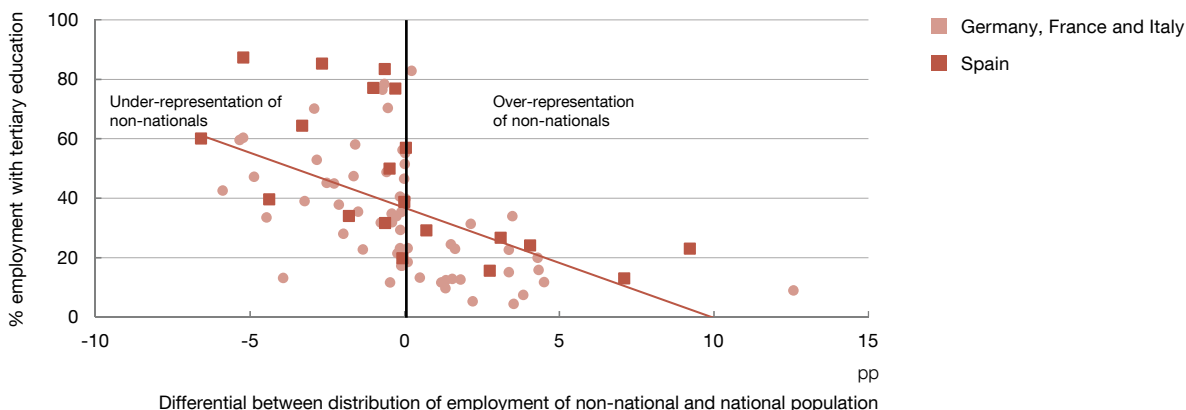


nationals, it can be assumed that non-nationals contribute more to the increase in labour supply in Spain than in other EU countries. Indeed, more recently, non-nationals have made a very significant contribution to employment growth in several European countries, notably in Spain, where non-national workers contributed 2.3 pp to the overall increase in employment in 2023,

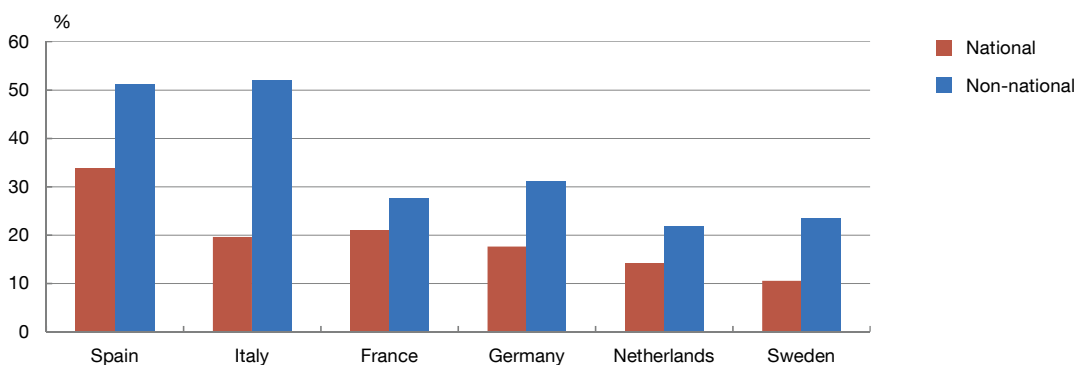
Chart 5

Sectoral distribution and overqualification in 2022 (a)

5.a Correlation between over-representation of non-nationals by sector and an indicator of average educational attainment level in each sector



5.b Overqualification indicator (b)



SOURCES: Eurostat (LFS) and Banco de España.

- a 2022 was marked by two extraordinary events: the arrival of immigrants who had not been able to emigrate in the previous two years owing to the pandemic restrictions, and the inflow to the EU of a large number of refugees from the war in Ukraine.
- b Share of persons aged 20-64 with a tertiary education (levels 5 to 8 of ISCED 2011) who are overqualified for their jobs (levels 4 to 9 of the International Standard Classification of Occupations 2008).



compared with 1.3 pp in the Netherlands and 1 pp in Germany (see Chart 4.c). In these countries, this represents between 75% and 80% of total employment growth.¹⁵

The sectoral distribution of employment among the non-national population is determined by the productive system of the destination countries and by the cyclical position. Nonetheless, there are some common traits in all the countries analysed, mainly relating to the fact that non-national workers tend to be concentrated in activities that do not require a high level of education and have less favourable working conditions.¹⁶ In 2022 non-nationals accounted for a higher

15 In Sweden, the positive contribution of non-national workers to employment growth far exceeds the negative contribution of national workers.

16 Long working hours, regular travel away from home and outdoor work are common in sectors with a high share of non-nationals.

share¹⁷ than nationals in domestic service, especially in Italy and Spain (where the differential between non-nationals and nationals was of around 12 pp and 7 pp, respectively). Hospitality is another sector with a higher concentration of non-nationals, in relative terms, in the four main EU economies, particularly in Spain (9 pp higher than that of Spanish nationals). These four countries also have a large share of non-national workers in administrative and support services, construction and transport.

More generally, Chart 5.a shows, for the four main EU countries, that there is a negative correlation between the skill level required in each sector of activity (defined as the percentage of workers with a tertiary education) and the differential between the share of non-nationals and nationals in that sector. First, this situation reflects the skill level of immigrants to the EU, and second, it shows some under-utilisation of the human capital they can contribute. Thus, the number of overqualified non-national workers exceeds that of national workers in all EU countries that receive immigrants, according to Eurostat's LFS indicator that measures the percentage of workers who are overqualified for their jobs (see Chart 5.b).¹⁸ In this respect, Spain, along with Italy, had the highest share of overqualified non-national workers (50%) in 2022, compared with Germany and France, where it stood at around 30%.

In any event, since 2008, the percentage of non-nationals in higher-qualified jobs has increased, and the share of those in low-skilled employment has decreased. For example, between 2008 and 2022, there was an increase in the percentage of newly arrived non-nationals (those residing in Spain for up to a year) employed in communications (from 2% to 12%), manufacturing (from 5% to 11%), retail (from 12% to 17%), healthcare and social services (from 1.6% to 3.3%), whereas that of non-nationals employed in domestic service and hospitality decreased (from 22% to 9% and 13% to 8%, respectively).

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17 In this article, the share of non-national workers – and, symmetrically, of national workers – in a given sector is defined as the percentage of non-nationals in that sector relative to the total number of non-national workers in the economy as a whole.

18 This indicator is in line with recent analyses that use a different methodology (Frattini and Dalmonte, 2024).

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How to cite this document

Cuadrado, Pilar, Ángel Luis Gómez and Teresa Sastre. (2024). "Comparing the characteristics of migratory flows to Spain and other European Union countries". *Economic Bulletin - Banco de España*, 2024/Q3, 06. <https://doi.org/10.53479/37432>

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ISSN 1695-9086 (online edition)