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Introduction 1

15 years ago Tony Fielding published his first analyses demonstrating SE England (SE) as an ‘escalator region’

He used linked 1971-1981 Census records of individual people (from ONS Longitudinal Study, LS) to show that people moving into the SE from the Rest of England & Wales (REW) advanced in their ‘social class’ faster than those ‘staying’ in the SE, who themselves advanced faster than residents of other regions.

And also demonstrated that people moving from SE to REW 1971-81 were ‘stepping off the escalator’ to some extent, notably by retiring or moving into lower-grade work (especially from professional and managerial into ‘self-employment = petite bourgeoisie’)

Subsequently, Fielding extended his work by differentiating by gender, showing that women get more advantage from this process than men, and also updated the analysis to cover the 1981-91 intercensal ‘transitions’.
• But so far there has been no analysis of differences by age. Nor of the life-course aspects of the process, i.e. whether individual people go through the full cycle of moving to SE, advancing in their careers and then stepping off the escalator.

• Not surprising, as previous analyses have been cross-sectional, covering either 1971-81 or 1981-91 transition periods – when, by definition, it will be different people moving into the SE and moving out (NB. no analysis of people’s birth region or previous move)

• But, now that LS members’ records have been updated to include their 2001 characteristics, there is now a 30-year span of data on ‘survivors’ that covers a fair proportion of a person’s working life. Enough to begin to explore the ‘life-cycle’ component of the ‘escalator region’ model, even if we need to wait for 2011 Census for a more comprehensive picture.
In this paper, initial results from ‘beta test’ project undertaken to help validate the 2001 Census link-up to the LS in advance of release for general users today.

In rest of this paper:

- Reminder of key elements of ‘escalator region’ model
- Approach taken in this test of the ‘return migration’ component: three questions
- Preliminary answers to the three questions
- Summary and next steps
Key elements of ‘escalator region’ model 1

- The three stages (‘conditions’) of the ‘escalator region’ ‘metaphor’ (from Fielding, 1992):
  - **Stage 1**: ER attracts many young people with promotion potential at the start of their working lives – ‘stepping on the escalator’;
  - **Stage 2**: ER provides the context where these immigrants achieve accelerated upward social mobility – ‘being taken up by the escalator’;
  - **Stage 3**: ER loses through out-migration a significant proportion of those gaining from this upward social mobility – ‘stepping off the escalator’.
The return migration element (Stage 3) in more detail:

‘These out-migrants would be in the middle to later stages of their working lives, or at or near to retirement.’

‘They would migrate partly to ‘cash in’ the assets gained during their social promotion in the ER. Some of these assets would be sold, others would ‘stretch’ further outside the ER due to lower living costs, while others would be drawn upon for ... a new career (e.g. ... to set up business on one’s own).’
Approach taken in the current test of the ‘return migration’ component

Focus is on South East England (SE) as the ER, defined by Fielding as the pre-1996 Standard Statistical Region (London plus 12 counties).

Basic aim is to extend the previous work by:

• Taking advantage of the 2001 census LS link-up, giving the 30-year span of individuals’ life-course development from 1971 – cf previous cross-sectional analyses

• Restricting the sample to younger people moving into the ER at the beginning of the study period and focusing only on survivors of these (enumerated in 1971, 1981 and 2001) – cf no age restriction

(in practice, only small difference from Fielding in that most migrants to SE are under 40, but important when comparing their trajectories with other population groups with different age structures).
Three questions to be addressed:

• What proportion of people moving to the ER early in their lives leave it again later in their lives? (The ER model mentions a ‘significant’ proportion, but does not specify this.)

• How much later in their lives did they move out of the SE – only around pensionable age, or a lot sooner? (The ER model requires most to have spent a fair % of their working lives in ER.)

• Is there any significant difference in social advancement etc between the into-ER migrants who have ‘stepped off the escalator’ by 2001 and those who haven’t? (The ER model is primarily powered by those who advance more quickly and have more assets etc to cash in.)
Details of this test, 1: Sample population


Two migrant cohorts selected for this test:

• Migrants from REW to SE 1966-71 (This migrant cohort is valuable because it provides a minimum of 30 years of lifecourse development to analyse since migration to ER.)

• Migrants from REW to SE 1971-81 (This is the cohort initially analysed by Fielding, and enables examination of migrants’ 1971 pre-move ‘social class’ as well as their circumstances in 1981 post-move and also in 2001.)
Details of this test, 2: ‘social class’

• ‘social class’: for exploratory analysis, a somewhat more detailed classification than that used by Fielding, but conformable with that. NB: As for Fielding, it is a hybrid of economic position and occupational status. See Table 1.

• NB. I am extremely grateful to David Mayer (CeLSIUS) and Kevin Lynch (ONS) for coding LSMs’ 2001 occupation to 1971/81/91 SEG and for coding LSMs’ 1966 and 2001 usual residence to 1974-96 Standard Statistical Region.
Table 1. Comparison of Fielding’s ‘social class’ with that used in present study

<table>
<thead>
<tr>
<th>Fielding’s full classification</th>
<th>SEG of employed</th>
<th>This study’s full classification</th>
<th>SEG of employed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service class</td>
<td>1, 2.2, 3, 4, 5.1</td>
<td>Managerial</td>
<td>1, 2.2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Professional (including technical)</td>
<td>3, 4, 5.1</td>
</tr>
<tr>
<td>Petite bourgeoisie</td>
<td>2.1, 12, 13, 14</td>
<td>Petite bourgeoisie</td>
<td>2.1, 12, 13, 14</td>
</tr>
<tr>
<td>White collar proletariat</td>
<td>5.2, 6, 7</td>
<td>White collar</td>
<td>5.2, 6</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Personal service</td>
<td>7</td>
</tr>
<tr>
<td>Blue collar proletariat</td>
<td>8, 9, 10, 11 ,15, 17</td>
<td>Skilled manual</td>
<td>8, 9</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other employed</td>
<td>10, 11, 15, 16, 17</td>
</tr>
<tr>
<td>Unemployed</td>
<td></td>
<td>Unemployed</td>
<td></td>
</tr>
<tr>
<td>In education</td>
<td></td>
<td>In education</td>
<td></td>
</tr>
<tr>
<td>Retired</td>
<td></td>
<td>Retired</td>
<td></td>
</tr>
<tr>
<td>Other inactive</td>
<td></td>
<td>Other inactive</td>
<td></td>
</tr>
<tr>
<td><strong>Total: all in England and Wales at start and end of transition period</strong></td>
<td></td>
<td><strong>Total: all aged 6-40 in 1971 in England and Wales, also there in 1981 and 2001</strong></td>
<td></td>
</tr>
</tbody>
</table>
Question 1

• What proportion of people moving to the ER early in their lives leave it again later in their lives, i.e. ‘step off the escalator’?

• Remember from ER ‘conditions’, Stage 3: ER loses through out-migration a ‘significant proportion’ of those gaining from the more rapid upward social mobility found in the ER.
What proportion of people moving to the ER early in their lives leave it again later in their lives?

1) 1966-71 in-migration cohort

- Between 1966 and 1971, 3,136 of the sample population (aged 6-40 in 1971) moved from REW to SE. (This is equivalent to 286,000 people based on the 4/365 sampling fraction, but we will continue to refer only to counts of LSMs and derived ratios.)
- Of these, 1,415 were living in REW again in 2001 = 45.1%. This would seem to be ‘a significant proportion’, particularly given that part of the migration cohort was still well below pensionable age (whole cohort is aged 36-70 in 2001).
- Note: If the ER model is correct, the proportion would be likely to rise further as the lower half of that age band approach pensionable age. BUT…..
What proportion of people moving to the ER early in their lives leave it again later in their lives?

1) 1966-71 in-migration cohort

- But separate analysis of two broad age bands within this cohort possibly suggests no major further rise above this 45% level:
  - Of the 1203 LSMs aged 26-40 in 1971 (56-70 in 2001), 512 were living back in the REW in 2001 = 42.6%.
  - This compares with 903/1933 (=46.7%) of LSMs aged 6-25 in 1971 (36-55).
- Therefore, more of the younger in-migrants of the 1966-71 cohort had left the SE by 2001 than of the older cohort.
What proportion of people moving to the ER early in their lives leave it again later in their lives?

2) 1971-81 in-migration cohort

- For those who moved into SE 1971-81 and survived to 2001 (N=4942 LSMs), 64% were living in the SE in 2001, and 36% were living back in REW 20-30 years after their move to SE.

- NB. Appears broadly consistent with the 45% of 1966-71 in-migration cohort living back in REW 30-35 years after their move to SE.
Question 2

• How much later in their lives (up to 2001) did these ‘return migrants’ move out of the SE – only around pensionable age, or a lot sooner?

• *Remember from ER ‘conditions’, Stage 3: most are expected to have spent a fair proportion of their working lives in ER so as to maximise the benefits of riding the escalator.*
How much later in their lives (up to 2001) did these ‘return migrants’ move back out of the SE?

1) 1966-71 in-migration cohort

• Quite a complicated question to answer, but the bottom line is that 1,098 of the 3,136 were already living back in REW in 1981 = 35.0%.

• Compared with the 1,415 living back in REW in 2001, this means that over three-quarters of the total (net*) returners 1971-2001 were back in REW only 10-15 years after their move to SE.

• *The reason why the answer is quite complicated is the degree of to-ing and fro-ing between SE and REW each decade. (Also, because some of the sample population was not traced in the 1991 Census, and need to have their whereabouts assumed.) See Table 2.
Table 2. Movements between REW and SE of the 1966-71 REW-to-SE migration cohort

<table>
<thead>
<tr>
<th>Period</th>
<th>In REW at start of period</th>
<th>From REW to SE</th>
<th>From SE to REW</th>
<th>In REW at end of period</th>
<th>In SE at end of period</th>
</tr>
</thead>
<tbody>
<tr>
<td>1966-1971</td>
<td>3136</td>
<td>3136</td>
<td>n/a</td>
<td>0</td>
<td>3136</td>
</tr>
<tr>
<td>1971-1981</td>
<td>0</td>
<td>n/a</td>
<td>1098</td>
<td>1098</td>
<td>2038</td>
</tr>
<tr>
<td>1981-1991</td>
<td>1098</td>
<td>*104</td>
<td>**287</td>
<td>1281</td>
<td>1855</td>
</tr>
<tr>
<td>1991-2001</td>
<td>1281</td>
<td>61</td>
<td>195</td>
<td>1415</td>
<td>1721</td>
</tr>
</tbody>
</table>

Note:
* includes 8 ‘whereabouts-unknown in 1991 but in SE in 2001’ – assume these moved to SE 1981-91;
** excludes 31 ‘whereabouts-unknown in 1991 but in REW in 2001’ – assume these moved to REW in 1991-2001. If assume the exact opposite, then 1312 in REW in 1991 (not 1281). Real situation is in range 1281-1312.
How much later in their lives (up to 2001) did these ‘return migrants’ move back out of the SE?

2) 1971-81 in-migration cohort

- **NB.** 4942 LSMs lived in REW in 1971 and in SE in 1981, and 1773 were living back in REW in 2001 (=35.9%)
- Of the 4942, 1558 (=31.5%) were already living back in REW in 1991, i.e. 7 out of 8 of the net* 1773 by-2001 ‘returners’.
  (*In fact, again some to/fro migrants: 93 of the 1558 were in the SE again in 2001.*)
What to make of the more-rapid-than-expected move back out of the SE?

1) Lack of success in the SE – the opposite of the ER effect?
2) Instant success followed by quick burnout and cashing in of gains?
3) Return migration for other reasons besides ER effect, e.g. family reasons?

(Note that this c/should not include LSMs moving to the SE for university because students’ usual address in 1971, 1981 and 1991 censuses was vacation address. But it might include return from on-the-job training in the SE.)

• There is the possibility that the ER effect (in its life-course version as here) is bi-modal: (1) A significant amount of return migration soon after initial move to the SE; (2) Then few others moving back until close to retirement – but the evidence of those aged 56-70 in 2001 (26-40 in 1971) does not give strong support to the latter.
• Is there any significant difference in social trajectory between the into-ER migrants who have ‘stepped off the escalator’ by 2001 and those who haven’t?

• Remember from ER ‘conditions’, Stage 3: The ER model is primarily powered by those who advance more quickly and have more assets etc to cash in, with ER’s in-migrants advancing more quickly than those already in ER.
Is there any significant difference between the into-ER migrants who have ‘stepped off the escalator’ by 2001 and those who haven’t?

- Focus on 1966-71 in-migrant cohort, re 1971-2001 change in their circumstances
- To get the feel of ‘social class’ behaviour, look at the position of the Returners in 1971 and 2001
- Do the same with Non-returners, i.e. those in-migrants to SE who were living in SE in 2001
- Then, compare the 1971 positions of Returners and Non-returners to see if there is any difference in their early post-move situation, which may indicate source of later selectivity
- Finally, compare the 2001 positions of Returners and Non-returners to see what differences are associated with ‘having stepped off the escalator’
‘Social class’ of the Returners in 1971 and 2001

- Managers
- Professionals
- Petite bourgeoisie
- White collar
- Personal service
- Skilled manual
- Other employed
- Unemployed
- In education
- Retired
- Other inactive

Returns in 1971

Returns in 2001
‘Social class’ of the Non-returners in 1971 and 2001

- Managers
- Professionals
- Petite bourgeoisie
- White collar
- Personal service
- Skilled manual
- Other employed
- Unemployed
- In education
- Retired
- Other inactive

Per cent

Non-returners in 1971
Non-returners in 2001
‘Social class’ in 1971: The Returners and Non-returners compared
‘Social class’ in 2001: The Returners and Non-returners compared
Summary of findings

• What proportion of people moving to the ER early in their lives leave it again later in their lives?
  A SIGNIFICANT PROPORTION – as hypothesised by the ER model.
• How much later in their lives did these people move out of the SE: only around pensionable age, or a lot sooner?
  AMONG THOSE STEPPING OFF BY 2001, A LOT SOONER – not really expected from the ER model.
• Is there any significant difference in ‘social class’ change between the into-ER migrants who have ‘stepped off the escalator’ by 2001 and those who haven’t?
  REMARKABLY FEW DIFFERENCES – especially considering the relatively short time that most Returners spent in the ER.
Next steps

• Look at ‘social change’ patterns for the 1971-81 migrant cohort, including pre-move (1971) situation
• Compare the patterns of ‘real returners’ (back to the same part of REW) with those moving on to a different part of REW
• Explore additional questions concerning migration into and out of the ER, e.g.
  - Is there any significant difference in social mobility between the return migrants and those of similar age who are leaving the ER ‘for the first time’?
  - Is there any significant difference in social mobility between those moving into the ER early in their lives and those moving out of the ER early in their lives?
• Attempt to analyse patterns of social mobility between each ‘social class’ and the others, as in Fielding’s original work – if sample size and disclosure controls allow

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