

## Migration Indicators: February 2010

### Background

On 25<sup>th</sup> February 2010 the Office for National Statistics (ONS), in combination with the Home Office and the Department for Work and Pensions (DWP), published a range of demographic statistics as part of the most recent quarterly consolidated release. Several of the datasets relate either directly or indirectly to migration. The geography used in the indicators varies but in all cases relates to the UK.

This *Update* presents these indicators of demographic change as they relate to the UK and London.

### Internal Migration

Data on migration within the UK are based on patient re-registrations in cumulative 12-month periods. The full dataset is for countries of the UK and English regions showing flows between regions, hence the UK figure is the total number of inter-regional moves.

Table 1 shows that in the latest 12-month period to the end of June 2009 there was a reduction of nearly 36 thousand in the net outflow from London compared to the year to June 2008. The outflow of 214 thousand is the lowest from London since 1997 and reflects the seventh consecutive quarter of decline. On the other hand the gross inflow to London from the rest of the UK, at 180 thousand was the highest since the GP patient registration data system (PRDS) was used to estimate internal migration flows in 1984. Therefore the net loss from London of 34 thousand was 47 thousand fewer than in the year to June 2007 and was the lowest since 1995-96. Overall the number of inter-regional movements in the UK, at 1.16 million, was the lowest for twenty years. Table 2 shows that London experienced a 13.7 per cent decline in its outflow since mid-2007 and had a 7.7 per cent increase in its inflow. London was the only region to experience an increase in its inflow in this period. In the same period the total number of inter-regional movements in the UK fell by 6.2 per cent.

In the latest year the proportion of UK inter-regional migration that came to London was at a recent high (15.6 per cent) and the outflow from London was a recent low (18.6 per cent).

The recent changes in inter-regional migration are clearly dependent upon recession effects. Many Londoners who would normally have moved to the adjacent regions are remaining, whether voluntarily or forced by economic and financial circumstances, and not moving to owner-occupied accommodation in the surrounding counties. The increase in the flow to London is not as straightforward. The inflow is dominated by young workers and students, who mainly move to rented accommodation. So far the recession has affected employment in London to a lesser extent than in other regions.

The decline in the outflow from London was proportionally highest for people at or approaching retirement age, a group that often plans on the equity they take when selling in London and buying cheaper property elsewhere. Some of these people may not be able to afford to leave London until the housing market recovers sufficiently, others may now never leave.

**Table 1: Internal (UK) migration to and from London, thousands. 12-month periods ending at quarter 2. ONS/PRDS**

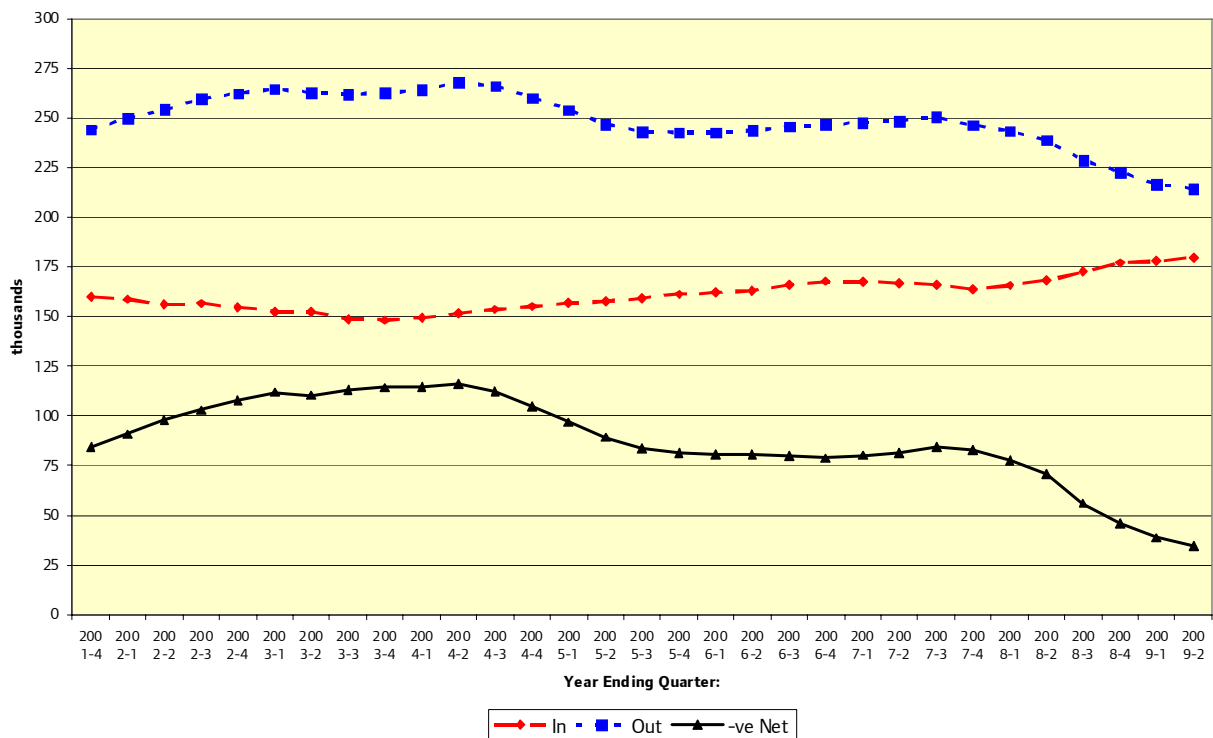
| London     | 2002 Q2 | 2003 Q2 | 2004 Q2 | 2005 Q2 | 2006 Q2 | 2007 Q2 | 2008 Q2 | 2009 Q2      | Annual Change |
|------------|---------|---------|---------|---------|---------|---------|---------|--------------|---------------|
| <b>In</b>  | 156.0   | 152.5   | 151.6   | 157.6   | 163.1   | 167.0   | 168.2   | <b>179.9</b> | 11.7          |
| <b>Out</b> | 254.2   | 262.9   | 267.8   | 246.9   | 243.7   | 248.4   | 238.8   | <b>214.4</b> | -24.4         |
| <b>Net</b> | -98.2   | -110.4  | -116.2  | -89.3   | -80.6   | -81.4   | -70.6   | <b>-34.5</b> | 36.1          |
| <b>UK</b>  | 1,268   | 1,263   | 1,270   | 1,213   | 1,212   | 1,227   | 1,190   | <b>1,152</b> | -38.0         |

**London Flows as % of UK**

|            | 2002 Q2 | 2003 Q2 | 2004 Q2 | 2005 Q2 | 2006 Q2 | 2007 Q2 | 2008 Q2 | 2009 Q2     |    |
|------------|---------|---------|---------|---------|---------|---------|---------|-------------|----|
| <b>In</b>  | 12.3    | 12.1    | 11.9    | 13.0    | 13.5    | 13.6    | 14.1    | <b>15.6</b> | .. |
| <b>Out</b> | 20.0    | 20.8    | 21.1    | 20.4    | 20.1    | 20.2    | 20.1    | <b>18.6</b> | .. |

In Chart 1 the net flow is shown as a positive number – rather than its true negative values. This is to enable a better overall presentation of the gross and net flows on a single scale.

**Chart 1: Internal (UK) migration to and from London, thousands, cumulative 12-month periods since 2001, thousands. ONS/PRDS.**



**Table 2: Percentage change in migration flows between 2007 Q2 and 2009 Q2, ONS/PRDS**

|       |            | From: |        |        |         | Total |
|-------|------------|-------|--------|--------|---------|-------|
|       |            | East  | London | S East | Rest UK |       |
| To:   | East       | -     | -18.0  | -7.3   | -1.9    | -10.1 |
|       | London     | 4.2   | -      | 2.1    | 13.0    | 7.7   |
|       | South East | -10.9 | -16.2  | -      | -4.0    | -10.1 |
|       | Rest UK    | -11.5 | -7.6   | -13.0  | -       | -     |
| Total |            | -7.6  | -13.7  | -8.1   | -       | -6.2  |

## International Migration

Data on international migration are based on a number of sources, principally the International Passenger Survey (IPS) but also estimates of moves to and from the Republic of Ireland and asylum seekers. The full dataset relates to calendar years for countries of the UK and English regions and extracts are shown in Table 3. However, a secondary set of information is used for the mid-year to mid-year flows at local authority level for the preparation of the mid-year estimates. The latest available data relate to 2008 and show that London experienced an international inflow of 163 thousand and an outflow of 113 thousand, leading to a net inflow of 50 thousand, the lowest this century.

Some indication of trends in international flows based solely on the IPS has been made available on a quarterly basis for the UK. The most recent figures are provisional and are displayed in Chart 2 and show that in the year ending June 2009 518 thousand persons arrived in the UK (20 thousand fewer than in 2008) and that 371 thousand persons left (38 thousand fewer than in 2008). The net inflow therefore increased by 18 thousand to 147 thousand in the year to June 2009. However, given that these figures are only a part of the full analysis of migration, no firm conclusions can be drawn as to the most recent direction of change of international flows.

One clear point can be made from looking at recent international flows is that there has been a significant change in the flows of citizens of the A8 Eastern European countries that acceded to the EU in 2004. The trends in inflows and outflows of A8 citizens since mid-2003 are shown in Table 4 and trends are shown in Chart 3. The year to June 2009 confirmed the downturn in the gross inflow to the UK that was first detected a year earlier as well as the higher levels of return migration. The net flow into the UK plummeted from 87 thousand in calendar year 2007 to just 10 thousand.

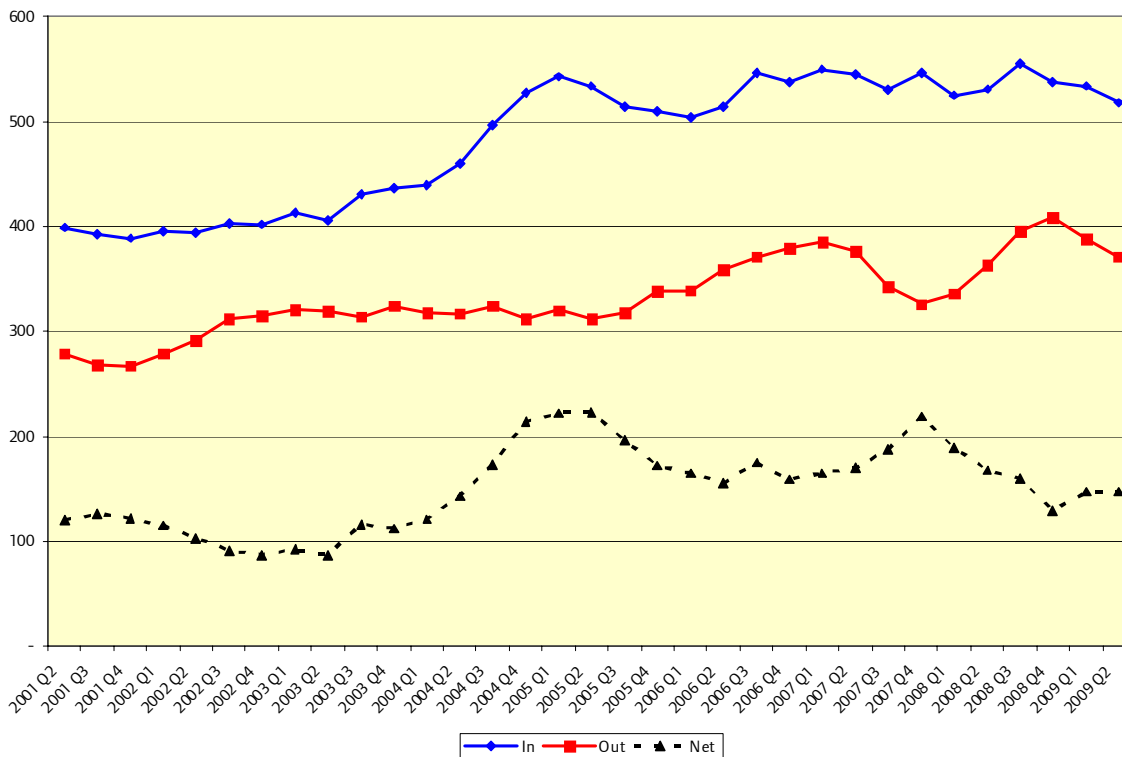
**Table 3: International migration to and from London and the UK, thousands, 12-month periods ending at quarter 2. ONS.**

|           |            | 2002 Q4 | 2003 Q4 | 2004 Q4 | 2005 Q4 | 2006 Q4 | 2007 Q4 | 2008 Q4    | Annual Change % |
|-----------|------------|---------|---------|---------|---------|---------|---------|------------|-----------------|
| <b>UK</b> | <b>In</b>  | 516     | 511     | 589     | 567     | 596     | 574     | <b>590</b> | 2.8             |
|           | <b>Out</b> | 363     | 363     | 344     | 361     | 398     | 341     | <b>427</b> | 25.2            |
|           | <b>Net</b> | 153     | 148     | 245     | 206     | 198     | 233     | <b>163</b> | -30.0           |

|               |            | 2002 Q4 | 2003 Q4 | 2004 Q4 | 2005 Q4 | 2006 Q4 | 2007 Q4 | 2008 Q4    | Annual Change % |
|---------------|------------|---------|---------|---------|---------|---------|---------|------------|-----------------|
| <b>London</b> | <b>In</b>  | 181     | 174     | 186     | 175     | 172     | 161     | <b>163</b> | 1.2             |
|               | <b>Out</b> | 108     | 103     | 88      | 95      | 117     | 92      | <b>113</b> | 22.8            |
|               | <b>Net</b> | 74      | 71      | 98      | 80      | 55      | 69      | <b>50</b>  | -27.5           |

|                          |            | 2002 Q4 | 2003 Q4 | 2004 Q4 | 2005 Q4 | 2006 Q4 | 2007 Q4 | 2008 Q4 |   |
|--------------------------|------------|---------|---------|---------|---------|---------|---------|---------|---|
| <b>London as % of UK</b> | <b>In</b>  | 35.1    | 34.1    | 31.6    | 30.9    | 28.9    | 28.0    | 27.6    | - |
|                          | <b>Out</b> | 29.8    | 28.4    | 25.6    | 26.3    | 29.4    | 27.0    | 26.5    | - |
|                          | <b>Net</b> | 48.4    | 48.0    | 40.0    | 38.8    | 27.8    | 29.6    | 30.7    | - |

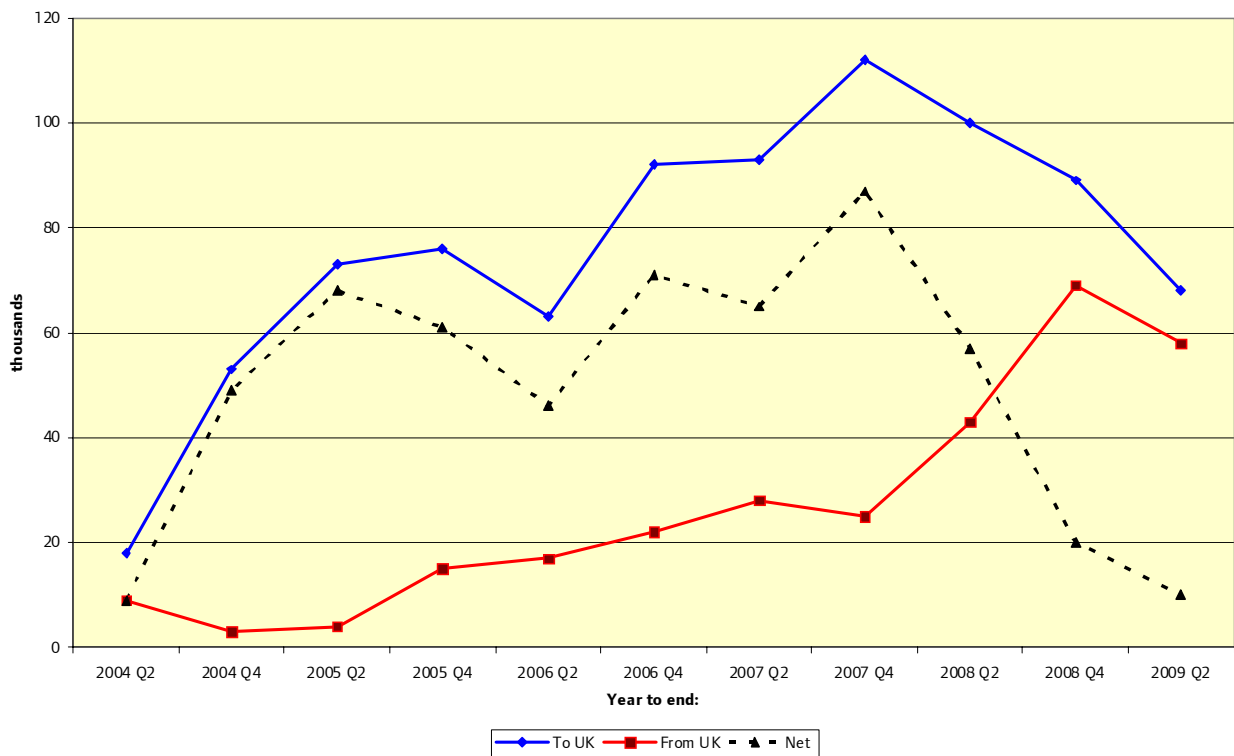
**Chart 2: International migration based on the International Passenger Survey, United Kingdom, cumulative 12-month periods since 2001, thousands, ONS**



**Table 4: Migration of A8 citizens to and from the UK, 12 month periods ending at quarter 2, thousands. ONS.**

|                | 2004 Q2 | 2005 Q2 | 2006 Q2 | 2007 Q2 | 2008 Q2 | 2009 Q2   |
|----------------|---------|---------|---------|---------|---------|-----------|
| <b>To UK</b>   | 18      | 73      | 63      | 93      | 100     | <b>68</b> |
| <b>From UK</b> | 9       | 4       | 17      | 28      | 43      | <b>58</b> |
| <b>Net</b>     | 9       | 68      | 46      | 65      | 57      | <b>10</b> |

**Chart 3: Migration of A8 citizens to and from then UK, ONS.**



## National Insurance Numbers (NINos)

New NINos allocated to overseas nationals by the DWP have become a useful way of monitoring the flow of citizens of EU accession states coming to the UK for work. The data, rounded to the nearest ten, are available for all local authorities in the UK by a full range of origin countries for financial years.

**Table 5: National Insurance Numbers allocated to Overseas Nationals, 12-month periods ending at stated quarters, thousands. DWP.**

|                               |               | 2003 Q1        | 2004 Q1        | 2005 Q1        | 2006 Q1        | 2007 Q1        | 2008 Q1        | 2009 Q1        | 2009 Q3        |
|-------------------------------|---------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| <b>Total</b>                  | <b>UK</b>     | 346.2          | 373.5          | 435.4          | 663.1          | 705.8          | 733.1          | 686.1          | <b>615.5</b>   |
|                               | <b>London</b> | 149.6          | 157.4          | 169.7          | 235.4          | 240.9          | 272.7          | 275.6          | ..             |
|                               |               | <b>2003 Q1</b> | <b>2004 Q1</b> | <b>2005 Q1</b> | <b>2006 Q1</b> | <b>2007 Q1</b> | <b>2008 Q1</b> | <b>2009 Q1</b> | <b>2009 Q3</b> |
| <b>EU A8</b>                  | <b>UK</b>     | 11.4           | 19.9           | 107.8          | 269.3          | 309.0          | 293.8          | 215.2          | <b>175.1</b>   |
|                               | <b>London</b> | 5.8            | 8.4            | 33.2           | 61.0           | 64.6           | 63.4           | ..             | ..             |
|                               |               | <b>2003 Q1</b> | <b>2004 Q1</b> | <b>2005 Q1</b> | <b>2006 Q1</b> | <b>2007 Q1</b> | <b>2008 Q1</b> | <b>2009 Q1</b> | <b>2009 Q3</b> |
| <b>Bulgaria &amp; Romania</b> | <b>UK</b>     | 5.8            | 8.4            | 7.8            | 5.7            | 6.8            | 36.9           | 39.9           | <b>35.2</b>    |
|                               | <b>London</b> | 3.8            | 5.2            | 4.2            | 1.7            | 3.4            | 23.4           | ..             | ..             |

The total inflow peaked in calendar year 2007 at 797 thousand and the flow from the EU A8 countries (Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia) peaked in the year to September 2007. The A8 flow fell by 27 per cent in the year to March 2009 and by a further 40 thousand up to September 2009. Up to March 2009 there had been an increase in flows from Bulgaria and Romania, which joined the EU at the beginning of 2007, but this flow has stalled in the most recent period.

## Worker Registration Scheme (WRS)

The WRS relates solely to the A8 countries. The data are available by 'regions' related to the first two characters of the postcode and do not align with the government office regions. For workers from Bulgaria and Romania there are a number of administrative ways by which they may legally obtain work in the UK. The data presented here relate to Accession Worker Cards and Registration Certificates, which are mainly given to the self-employed. Data on the Seasonal Agricultural Worker Scheme have not been presented here. None of the data are available below the level of the UK.

**Table 6: Worker Registration Scheme (A8); Accession Worker Cards and Registration Certificates (Bulgaria/Romania), 12-month periods ending at given quarters: thousands, DWP and Home Office**

|                         | 2004 Q4 | 2005 Q4 | 2006 Q4 | 2007 Q4 | 2008 Q4 | 2009 Q4      | Annual Change |
|-------------------------|---------|---------|---------|---------|---------|--------------|---------------|
| <b>WRS</b>              | 134.6   | 212.3   | 234.7   | 218.0   | 166.7   | <b>113.4</b> | -51.3         |
|                         |         |         |         | 2007 Q4 | 2008 Q4 | 2009 Q4      | Annual Change |
| <b>Bulgaria/Romania</b> |         |         |         | 40.9    | 29.9    | <b>30.4</b>  | -11.0         |

The downturn in WRS applications reflects what has been seen with NINOs for A8 countries. It is too early to detect trends in the Bulgaria/Romania data given that 2007 was the first year since accession, but these numbers also broadly reflect changes in NINOs.

## Flag 4 GP Registrations

A 'Flag 4' is generated when a person registers with a GP and has either been born outside the UK or has a previous address outside the UK and has been outside the UK for at least 3 months. The 'Flag 4' is removed from the record if the person re-registers with another GP.

**Table 7: Flag 4 Registrations in mid-year to mid-year periods, thousands. ONS/PRDS.**

|                            | 2000-01 | 2001-02 | 2002-03 | 2003-04 | 2004-05 | 2005-06 | 2006-07 | 2007-08 | Annual Change % |
|----------------------------|---------|---------|---------|---------|---------|---------|---------|---------|-----------------|
| <b>England</b>             | 398.3   | 420.0   | 445.1   | 460.7   | 520.9   | 551.6   | 581.3   | 588.0   | 0.17            |
| <b>London</b>              | 165.2   | 164.0   | 171.1   | 176.5   | 192.6   | 190.6   | 192.8   | 193.0   | 0.52            |
| <b>London as % England</b> | 41.5    | 39.0    | 38.4    | 38.3    | 37.0    | 34.6    | 33.2    | 32.8    | -               |

Source: Patient Register Data Services (PRDS)

ONS first published these annual data in August 2009 – although they have been available on request for internal research purposes in recent years. New registrations in 2007-08 were barely higher than a year earlier. London's share of registrations in England has fallen since 2000-01 but actual numbers have been consistently just over 190 thousand for four years. For London the Flag 4s are invariably higher than ONS estimates of international inflow, even though they would not include most returning British citizens. It is therefore likely that the '3 month' rule means that there are short-term migrants included amongst the Flag 4s.

## Conclusions

The most recent migration data generally show a diminution of the sizes of migration flows. The two measures that are used by ONS to prepare the mid-year estimates – internal and international migration - imply that London has moved from a period of net migration losses (15 thousand in 2007-08 according to the mid-year estimate change analysis) to a small gains. In calendar year 2008 this could have been about 4 thousand, with the internal migration loss diminishing further in the most recent two quarters. However, the flows are changing rapidly, as fewer people are leaving London to go to the rest of UK at the same time as more people, mainly non-British citizens and especially A8 citizens, are moving overseas.

A major exception to lower flows is the continuing increase in the flow to London from the rest of the UK.

The general decline in the numbers of people moving between regions and particularly those leaving London is an indication of the impact of the present financial downturn.

The impact of global economic uncertainty and the UK recession shows up in the recent declines in new NINos and WRS registrations, as well as the return migration to A8 countries. The only exception remains the buoyant NINo flow from Bulgaria and Romania. Whether migration flows respond to the UK economy having officially moved out of recession and return to previous levels will not be able to be detected from the official statistics until late in 2010.

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