

## Migration Indicators: November 2010

### Background

On 25<sup>th</sup> November 2010 the Office for National Statistics (ONS), in combination with the Home Office and the Department for Work and Pensions (DWP), published the Migration Statistics Quarterly report, which provides a summary of the official quarterly migration data releases. The geography used in these datasets varies, but in all cases relate to the UK. In this *Update* most data are presented for 12 month periods at the end of the second quarter (ie mid-year) together with the latest quarter, however National Insurance data are based on financial years; the end of the first quarter.

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

### Internal Migration

Estimates of migration within the UK are mainly 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 the net outflows from London increased for the third consecutive quarter, reaching 41 thousand in March 2010. This is an increase of 6.3 thousand since the year to June 2009. The outflow of 219 thousand is the third consecutive quarterly increase after seven successive quarterly declines since September 2007. The gross inflows remained the same as the first quarter of 2010 at 178 thousand, resulting in an overall increase in the net outflow. The net loss from London of 41 thousand at the end of March 2010 was just half that at mid-2007 (81 thousand).

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

#### London

	2002 Q2	2003 Q2	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	2010 Q1
<b>In</b>	156.0	152.5	151.6	157.6	163.1	167.0	168.2	179.9	178.1
<b>Out</b>	254.2	262.9	267.8	246.9	243.7	248.4	238.8	214.4	218.9
<b>Net</b>	-98.2	-110.4	-116.2	-89.3	-80.6	-81.4	-70.6	-34.5	-40.8

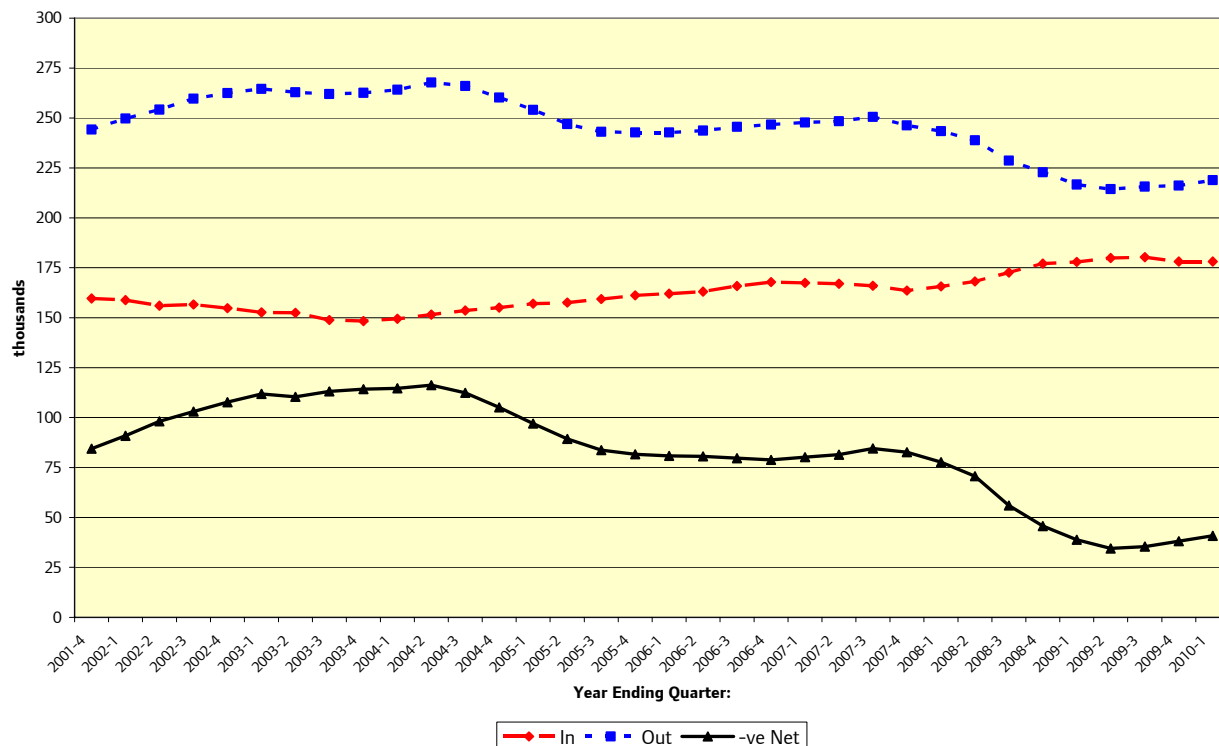
<b>UK</b>	1,268	1,263	1,270	1,213	1,212	1,227	1,190	1,152	1,161
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#### London Flows as % of UK

	2002 Q2	2003 Q2	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	2010 Q1
<b>In</b>	12.3	12.1	11.9	13.0	13.5	13.6	14.1	15.6	15.3
<b>Out</b>	20.0	20.8	21.1	20.4	20.1	20.2	20.1	18.6	18.9

In Chart 1 the net outflow from London 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.**



## Student Flows within the UK

In May 2010 ONS revised the estimates of internal UK migrants used in the mid-year estimate change analysis by including flows of students from home to higher education and to next destinations after completing a course. These data came from the Higher Education Statistics Agency (HESA) and were added to the GP re-registration data. Table 2 shows the resulting adjustments to the internal migration flows shown in Table 1. Flow data have not been published for 2001-02 and 2002-03. London has gained over 40 thousand net internal migrants as a result of this adjustment, although the level of gain has tended to fall through the decade.

**Table 2: Student Flows to and from London, thousands. 12-month periods ending at quarter 2. ONS/HESA.**

	2002 Q2	2003 Q2	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2
<b>In</b>	-	-	17.4	21.5	23.7	24.7	24.0	25.3
<b>Out</b>	-	-	11.4	17.0	19.8	20.5	21.1	22.8
<b>Net</b>	9.2	7.4	6.0	4.5	3.9	4.2	2.9	2.5

## International Migration

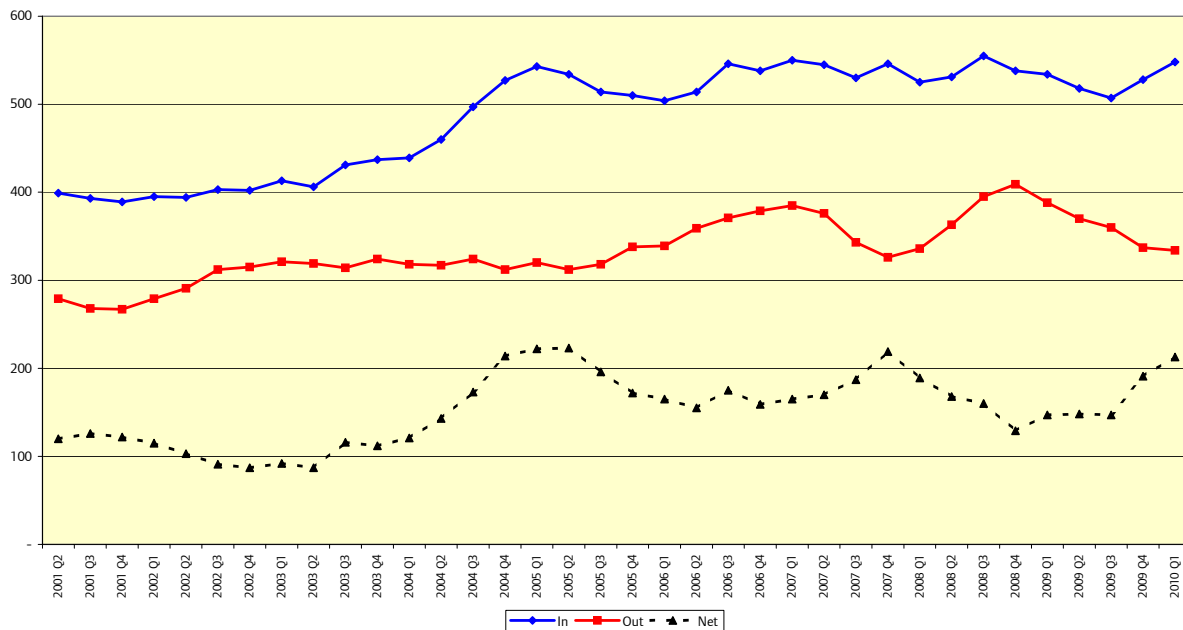
Data on international migration are based on a number of sources, principally the International Passenger Survey (IPS) but also separate estimates of moves to and from the Republic of Ireland (up to 2008 but now included in the IPS), asylum seekers and visitor switchers. The full dataset relates to calendar years and mid-year to mid-year periods for countries of the UK and English regions. Extracts are shown in Table 3. The latest provisional national data relate to financial year 2009/10 and show a significant rise in the net inflow since mid-2009. London in the year to mid-2009 experienced an international inflow of 156 thousand and an outflow of 117 thousand, leading to a net inflow of 40 thousand, the lowest this century. London's estimated share of international immigration to the UK has fallen through the century, but its share of emigrants has been more stable. London is now the net recipient of less than a quarter of the estimated net international flow to the UK compared to over a half in the years 2001-02 to 2003-04.

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 March 2010 548 thousand persons arrived in the UK (14 thousand more than in 2009) and 334 thousand persons left (54 thousand fewer than in 2009). The net inflow therefore increased by 66 thousand to 213 thousand in the year to March 2010. However, given that these figures are only a part of the full analysis of migration, no firm conclusions should be drawn as to the most recent direction of change of international flows.

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

		2002 Q2	2003 Q2	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	2010 Q1
<b>UK</b>	<b>In</b>	491	508	528	596	565	595	571	<b>563</b>	<b>580</b>
	<b>Out</b>	342	360	354	336	388	387	375	<b>398</b>	<b>364</b>
	<b>Net</b>	148	148	174	260	177	208	196	<b>164</b>	<b>215</b>
		2002 Q2	2003 Q2	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	2010 Q1
<b>London</b>	<b>In</b>	182	176	179	188	172	172	156	<b>156</b>	
	<b>Out</b>	93	113	91	94	101	114	101	<b>117</b>	
	<b>Net</b>	90	63	88	94	71	58	56	<b>40</b>	
		2002 Q2	2003 Q2	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	
<b>London as % of UK</b>	<b>In</b>	37.1	34.6	34.0	31.6	30.4	29.0	27.4	<b>27.7</b>	
	<b>Out</b>	27.1	31.4	25.8	28.1	26.0	29.5	26.9	<b>29.3</b>	
	<b>Net</b>	60.6	42.3	50.6	36.2	40.3	27.8	28.4	<b>24.1</b>	

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

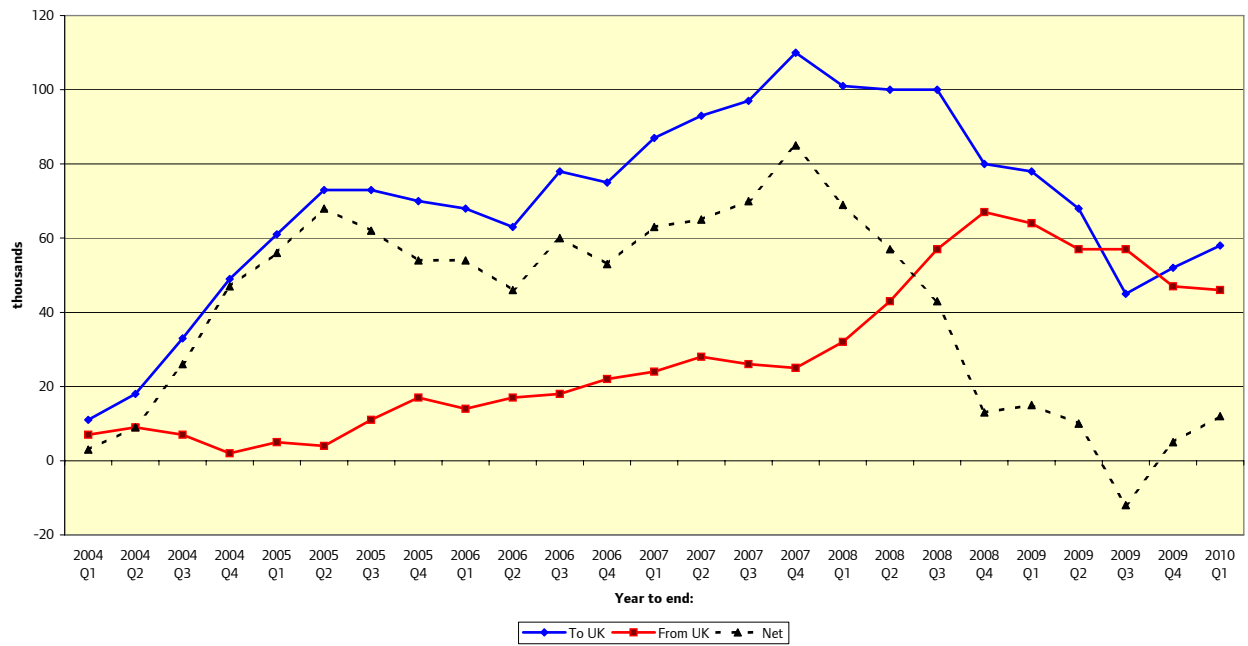


Recent international flows show a significant change in the numbers of citizens of the A8 Eastern European countries that acceded to the EU in 2004. The trends in inflows and outflows of A8 citizens since mid-2003 are shown in Table 4 and trends are shown in Chart 3. The year to March 2010 confirmed the continued decline in the gross inflow to the UK from the peak of 101 thousand in the year to March 2008 to just under sixty per cent of that figure. The number of return migrants however, dropped from 64 thousand to 46 thousand between the years to March 2009 and March 2010. The net flow into the UK plummeted from 69 thousand at the end of March 2008 to just 12 thousand at the end of March 2010, although the year to September 2009 had shown a net outflow due to the lowest annual level of inflow to the UK since 2004.

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

	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	2010 Q1
<b>To UK</b>	18	73	63	93	100	68	<b>58</b>
<b>From UK</b>	9	4	17	28	43	58	<b>46</b>
<b>Net</b>	9	68	46	65	57	10	<b>12</b>

**Chart 3: Migration of A8 citizens to and from the 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 6: National Insurance Numbers allocated to Overseas Nationals, 12-month periods ending at quarter 1, thousands. DWP.**

		2003 Q1	2004 Q1	2005 Q1	2006 Q1	2007 Q1	2008 Q1	2009 Q1	2010 Q1
<b>Total</b>	<b>UK</b>	346.2	373.5	435.4	663.1	705.8	733.1	686.1	<b>572.7</b>
	<b>London</b>	149.6	157.4	169.7	235.4	240.9	272.7	275.6	<b>249.2</b>
		2003 Q1	2004 Q1	2005 Q1	2006 Q1	2007 Q1	2008 Q1	2009 Q1	2010 Q1
<b>EU A8</b>	<b>UK</b>	11.4	19.9	107.8	269.3	309.0	293.8	215.2	<b>151.3</b>
	<b>London</b>	5.8	8.4	33.2	61.0	64.6	63.4	52.8	<b>38.0</b>
		2003 Q1	2004 Q1	2005 Q1	2006 Q1	2007 Q1	2008 Q1	2009 Q1	2010 Q1
<b>Bulgaria &amp; Romania</b>	<b>UK</b>	5.8	8.4	7.8	5.7	6.8	36.9	39.9	<b>30.2</b>
	<b>London</b>	3.8	5.2	4.2	1.7	3.4	23.4	20.7	<b>11.8</b>

The total number of new NINOs issued in the year to June 2010 rose to 604 thousand, a reduction of 24 thousand compared to a year earlier. 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 to the UK continued to fall by another 30 percent (similar to the previous year) to 151.3 thousand, at the end of the first quarter of 2010. This was also the trend in London, where registrations continued to decline to just 38 thousand compared to the peak of 64.6 thousand, a drop of 41 per cent since 2007.

Continuing the decline in flows since 2008, there was a significant drop of 43 per cent in the year to March 2010 in the flows from Bulgaria and Romania, which joined the EU at the beginning of 2007.

## 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 when 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	2008-09
<b>England</b>	398.3	420.0	445.1	460.7	520.9	551.6	581.3	588.0	577.6
<b>London</b>	165.2	164.0	171.1	176.5	192.6	190.6	192.8	193.0	204.1
<b>London as % England</b>	41.5	39.0	38.4	38.3	37.0	34.6	33.2	32.8	35.3

Source: Patient Register Data Services (PRDS)

ONS first published these data in August 2009 – although they have been available on request for internal research purposes in recent years. New registrations in England in 2008-09 were 10.4 thousand lower than a year earlier. On the other hand, London's share of registrations has risen again to 35.3%, with an increase of 11.3 thousand since 2007-08, following a downward trend since 2000-01.

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

Over the last two years migration data generally show a diminution of the sizes of most flows; however the latest data see some rises in volumes. In the year to March 2010 more people have continued to leave London to go to the rest of UK. At the same time, the international flow from the UK has continued to decline while the inflow has increased, leading to a significant upturn in the net inflow to the UK. The net inflow of A8 citizens in the year to mid-2010 has also risen (12 thousand) reaching slightly higher levels than those in mid-2009 (10 thousand).

The two measures that are used by ONS to prepare the mid-year estimates are internal and total long-term international migration. The patient based internal migration data show that London has started to see more people moving to the rest of the UK while the international flow data for the whole UK show that the country is having a rise in the net international inflow. In combination these two statistics imply that London's small overall net migration gain of 7,600 in 2008-09, as shown by the ONS mid-year estimates, may have increased to about 15 thousand in the year to March 2010. The only element of this calculation that can be updated to March 2010 is the GP re-registration part of internal migration. This shows that London's net loss to the rest of the UK has increased by over 6 thousand since mid-2009. However, if London's shares of the UK international flows remained unchanged in the year to March 2010 there would have been a net international gain to London of about 54 thousand compared to 40 thousand in 2008-09.

The general decline in the numbers of people moving between regions and particularly those leaving London in the last few years 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 NINo registrations, as well as the level of return migration to A8 countries. The previously buoyant NINo inflow from Bulgaria and Romania was nearly halved in the year to March 2010. Whether migration flows respond to the UK economy having moved out of recession and return to previous levels will not start be detected from the official statistics until the ONS migration releases due in February 2011 which will show internal and international flows to mid-2010 and NINOs to September 2010.