

## Migration Indicators: May 2011

### Background

On 26<sup>th</sup> May the Office for National Statistics (ONS), in combination with the Home Office and the Department for Work and Pensions (DWP), published Migration Statistics Quarterly Report No 9, 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 regional 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. The new series showing short-term migration to England and Wales is also included.

### 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 have continued to increase from the recent low base, reaching 44 thousand in September 2010. This is an increase of 10 thousand since June 2009 but still well below pre-recession values. The outflow of 221 thousand is the fifth consecutive quarterly increase after seven successive quarterly declines since September 2007. The gross inflows were again slightly reduced at 177 thousand, resulting in the overall increase in the net outflow.

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

#### London

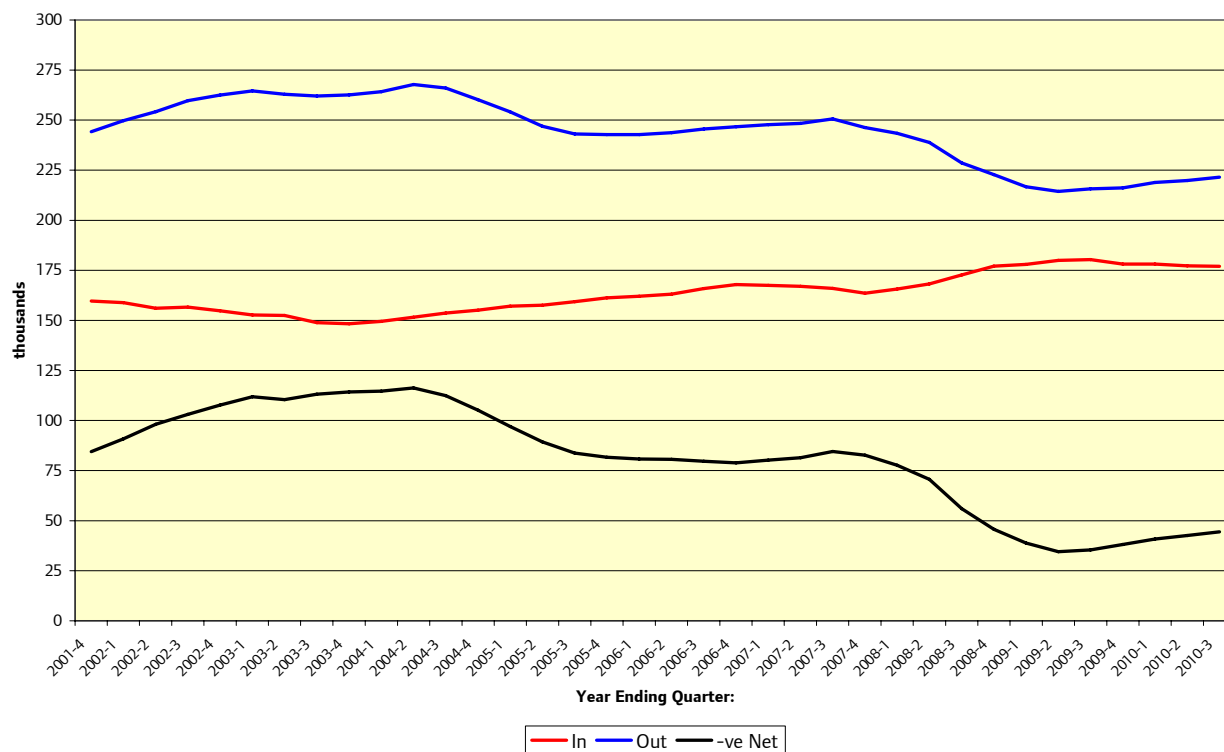
	2002 Q2	2003 Q2	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	2010 Q2	2010 Q3
<b>In</b>	156.0	152.5	151.6	157.6	163.1	167.0	168.2	179.9	177.2	177.0
<b>Out</b>	254.2	262.9	267.8	246.9	243.7	248.4	238.8	214.4	219.8	221.5
<b>Net</b>	-98.2	-110.4	-116.2	-89.3	-80.6	-81.4	-70.6	-34.5	-42.6	-44.5
<b>UK</b>	1,268	1,263	1,270	1,213	1,212	1,227	1,190	1,152	1,160	1,163

#### London Flows as % of UK

	2002 Q2	2003 Q2	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	2010 Q2	2010 Q3
<b>In</b>	12.3	12.1	11.9	13.0	13.5	13.6	14.1	15.6	15.3	15.2
<b>Out</b>	20.0	20.8	21.1	20.4	20.1	20.2	20.1	18.6	18.9	19.0

In Chart 1 London 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.**



## Student Flows within the UK

In May 2010 ONS revised the estimates of internal UK migrants used in the mid-year population 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 shown in Table 1. 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. Data for 2009-10 are expected to be released on 30<sup>th</sup> June.

**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

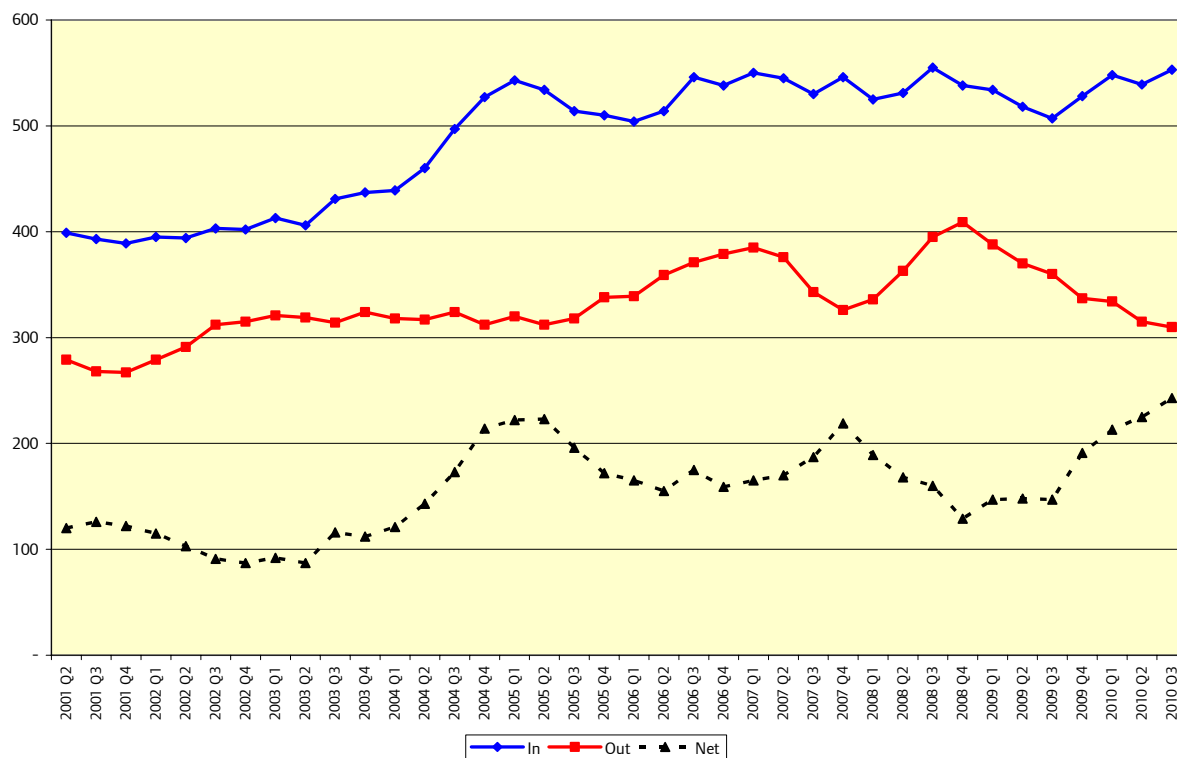
Data on international migration are based on a number of sources, principally the International Passenger Survey (IPS) but also separate estimates of moves to and from the Republic of Ireland (up to 2008 but now included in the IPS), asylum seekers and visitor switchers. The full dataset relates to calendar 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 the year ending September 2010 and show a significant rise in the net inflow since mid-2009 coupled with a declining outflow leading to the highest annual net inflow (242 thousand) since June 2005. In calendar year 2009, the latest available data, London is estimated to have experienced an international inflow of 154 thousand coupled with an outflow of 123 thousand, leading to a net inflow of just 30 thousand, the lowest since the early 1990s. London's estimated share of international immigration to the UK has fallen by 10 percentage points since 2001-02 although its share of emigrants has been more stable. In 2009 London was the source of a third of UK emigration resulting in London being the net recipient of only 15 per cent of the estimated net international flow to the UK compared to over a half in the years 2001 to 2004.

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 quarterly figures are provisional and are displayed in Chart 2 and show that in the year ending September 2010 553 thousand persons arrived in the UK and 310 thousand persons left. The net inflow therefore increased to 243 thousand. The rising trend of net immigration to the UK over the last seven quarters has been driven by the reduction in the annual outflow of nearly 100 thousand persons. This reduction reflects, in part, the new diffidence in British Citizens willingness to move overseas; in 2006 over 200 thousand did so but only 122 thousand in the most recent 12-months. The outflow of non-British citizens has fallen from a recession-driven peak of 243 thousand in 2008 to 188 thousand in the most recent year. However, these figures are only a part of the full analysis of international migration, so no firm conclusions should be drawn as to whether the most recent direction of change of international flows will continue to the end of 2010 and beyond.

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

		2002 Q2	2003 Q2	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	2009 Q4	2010 Q2 (prov)	2010 Q3 (prov)
<b>UK</b>	<b>In</b>	491	508	528	596	565	595	571	563	<b>567</b>	572	<b>586</b>
	<b>Out</b>	342	360	354	336	388	387	375	397	<b>368</b>	346	<b>344</b>
	<b>Net</b>	148	148	174	260	177	208	196	166	<b>198</b>	216	<b>242</b>
		2002 Q2	2003 Q2	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	2009 Q4		
<b>London</b>	<b>In</b>	182	176	179	188	172	172	156	156	<b>154</b>		
	<b>Out</b>	93	113	91	94	101	114	101	117	<b>123</b>		
	<b>Net</b>	90	63	88	94	71	58	56	40	<b>30</b>		
		2002 Q2	2003 Q2	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	2009 Q4		
<b>London as % of UK</b>	<b>In</b>	37.1	34.6	34.0	31.6	30.4	29.0	27.4	27.7	<b>27.2</b>		
	<b>Out</b>	27.1	31.4	25.8	28.1	26.0	29.5	26.9	29.4	<b>33.4</b>		
	<b>Net</b>	60.6	42.3	50.6	36.2	40.3	27.8	28.4	23.8	<b>15.2</b>		

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

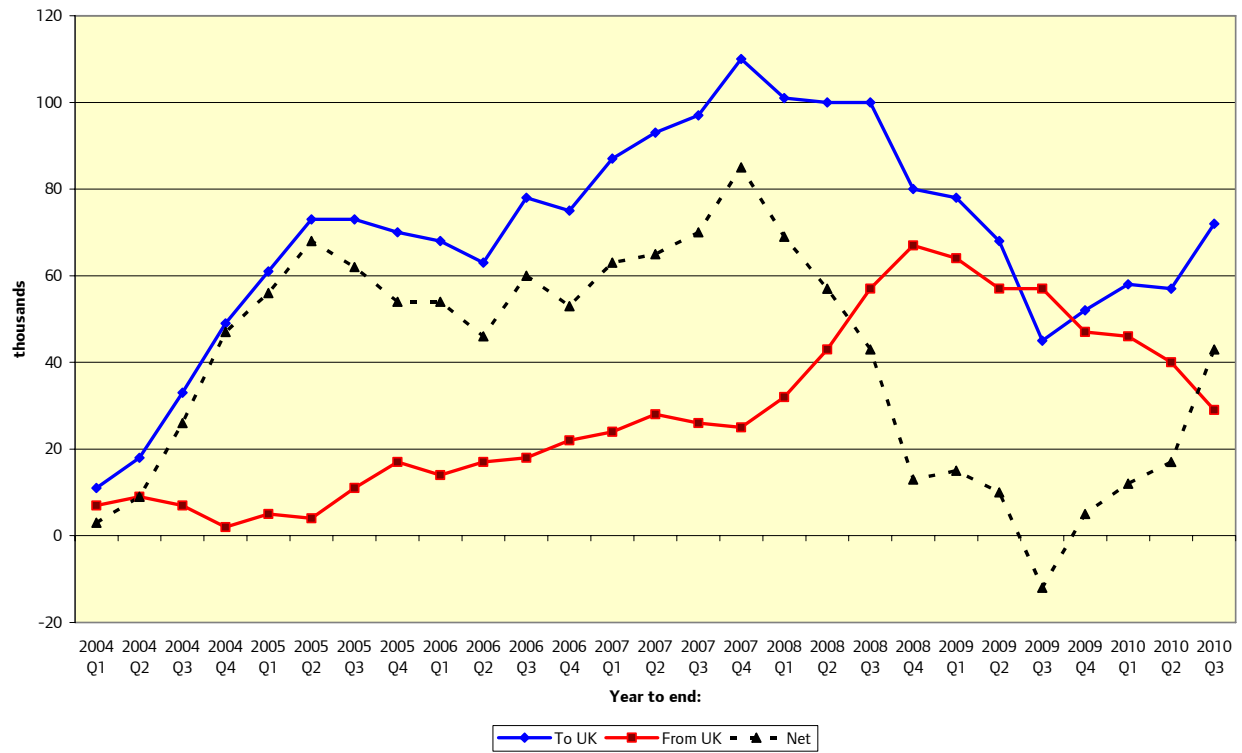


Recent international flows show a significant change in the numbers of citizens of the A8 Eastern European countries that acceded to the EU in 2004. The trends in inflows and outflows of A8 citizens since mid-2003 are shown in Table 4 and Chart 3. The year to September 2010 showed a considerable increase in the gross inflow to the UK, which rose to 72 thousand from a low of 45 thousand a year earlier. The number of return migrants continued to decline for the seventh successive quarter (to 29 thousand), having peaked at 67 thousand in 2008. The net flow into the UK, having remained below 20 thousand a year for the previous seven quarters, has more than doubled to 43 thousand in the latest 12-month period.

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

	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	2010 Q2	2010 Q3
<b>To UK</b>	18	73	63	93	100	68	57	<b>72</b>
<b>From UK</b>	9	4	17	28	43	58	40	<b>29</b>
<b>Net</b>	9	68	46	65	57	10	17	<b>43</b>

**Chart 3: Migration of A8 citizens to and from the UK, 12-month periods, 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 financial years for all local authorities in the UK by a full range of origin countries.

**Table 5: National Insurance Numbers allocated to Overseas Nationals, 12-month periods ending at quarter 1 and the latest quarter, thousands. DWP.**

		2003 Q1	2004 Q1	2005 Q1	2006 Q1	2007 Q1	2008 Q1	2009 Q1	2010 Q1	2010 Q4
<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>667.5</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	2010 Q4
<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>176.8</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	2010 Q4
<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>31.4</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 2010 rose to 668 thousand, an increase of 95 thousand in nine months. The total inflow peaked in calendar year 2007 at 797 thousand and the flow from the EU A8 countries peaked in the year to September 2007. The A8 flow to the UK, having fallen rapidly, has recovered to 177 thousand, up 25 thousand in nine months. In London, up to March 2010, total new NINO registrations, including those of A8 citizens, continued to decline. Over the last three years the proportion of total new NINOs that are registered in London has increased and London has returned to having over 43 per cent of total NINOs as it did in 2002/03. However, only 25 per cent of A8 NINOs are registered in London, compared to over half before EU accession.

Flows from Bulgaria and Romania, which joined the EU at the beginning of 2007, have stabilised during 2010 following the decline in flows since 2008.

## 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 6: 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 annual 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 11.1 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.

The next release of these data will be for 2009-10 on 30<sup>th</sup> June.

## Short-Term Migration

On 24<sup>th</sup> February ONS issued a comprehensive set of estimates of short-term international migrant flows for England and Wales. Data are available for inflows and outflows and stocks based on the broad 1-12 months duration and the narrower 3-12 months definition favoured by the United Nations. These statistics have recently been assessed by the UK Statistics Authority as meeting the requirements of being badged as 'National Statistics'. At present there are no estimates for regions.

In the year to mid-2009 those coming for employment fell to only 38 thousand, 70 thousand fewer than in 2005-06. Numbers coming to study at 67 thousand were more than in 2007-08 but still less than in all earlier years.

**Table 7: Short-term Migrants (3-12 months) to England & Wales by purpose, year to mid-year, thousands. ONS/IPS.**

	mid-2004	mid-2005	mid-2006	mid-2007	mid-2008	mid-2009
<b>All Reasons</b>	295	335	374	291	281	237
<b>Employment</b>	59	90	108	76	67	38
<b>Study</b>	78	70	82	76	65	67
<b>Other</b>	157	175	184	139	149	132

## Conclusions

The most recent migration data show a mix of increases and decreases in the flows. Inflows to the UK have risen while the outflows have declined. Some of the flows have changed rapidly and trends in London are not necessarily reflecting the national situation. In the first nine months of 2010 more people left London to go to the rest of UK, though still at relatively low levels compared to pre-recession years. At the same time, the net international flow to the UK has increased due, largely, to a reduction in outflows. Ironically the international outflow from London has been estimated to have risen, leading to a reduced net inflow. The net inflow of A8 citizens has also risen but is still below the peak.

The two measures that are used by ONS to prepare the mid-year estimates are internal and total long-term international migration. In 2008-09 the mid-year estimates showed a small net gain (7.6 thousand) following several years of net losses. The only element of this calculation that can be fully updated to mid-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 8.1 thousand in the year since mid-2009. The latest estimate of international migration shows a much reduced net gain of 30 thousand in calendar year 2009. If this level is sustained in the full year to mid-2010 London would have returned to an overall net migration loss of about 10 thousand persons in 2009-10. The precise position will be confirmed when ONS release the mid-2010 estimates and accompanying change analyses on 30<sup>th</sup> June.

The UK's move out of recession shows up in the increases in new NINo registrations both overall and from the A8, with the fall in new registrations from Bulgaria and Romania having been stabilised. Although the NINos moved up sharply in the last quarter of 2010, any further reflection of the UK's poor economic performance in the last quarter of 2010 will not be picked up in the migration statistical series until the data releases in August and November 2011.

Estimates of short-term migrants to England and Wales are only available to mid-2009 and therefore lag the other international migration series by at least a year. The data show a dramatic fall in the number of short-term migrants arriving for employment. This is in line with falls in NINos and IPS estimates for the same period.