

Update 10-2014

Migration Indicators: May 2014

July 2014

Summary

- This *Update* contains new internal migration data for year ending June 2013, provisional Long-Term International Migration (LTIM) and International Passenger Survey (IPS) data for year ending December 2013, and new short-term migration for year ending June 2012. It also includes new National Insurance Number (NINo) allocation data released by DWP for year ending March 2014. No other data has been updated.
- Both internal in- and outflows to London fell in 2013 but remain above levels seen in the late 2000s.
- International in-migration rose for the year ending December 2014 compared to the previous year. This was largely driven by a rise in inflows from EU15 countries.
- Inflows into the UK rose by 28 thousand in 2013 to reach 526 thousand. This is the first increase in inflows seen since 2010.
- “Formal study” remains the most popular reason for migrating to the UK (177 thousand people) followed by those with a definite job (132 thousand).
- NINo allocations in both London and the UK rose; up 17 thousand in London and 37 thousand in the UK compared to the year before.
- NINo registrations by those from Bulgaria and Romania (EU2) were nearly 17 thousand higher in London than the previous year and 36 thousand higher in the UK. This is likely to be due to the end of temporary work restrictions on 1 January 2014 for citizens from these countries.
- The number of short-term migrants fell overall in 2012 by 11 thousand although short-term migration for employment reasons rose by 13 thousand.

Background

The Office for National Statistics (ONS) releases their Migration Statistics Quarterly Report alongside an update of a range of migration data in February, May, August and November of each year. The geography used in these datasets relates mainly to the UK and London with the exception of 'Flag 4' data which is solely for England and, internal and short-term international migration data which relates to England & Wales.

The Department for Work and Pensions (DWP) releases quarterly data on National Insurance Number (NINo) registrations. This data are accessible via the Stat-Xplore website which allows customised tabulations to be created. For this *Update*, data is extracted on a UK and London basis by nationality and world region of registrant.

All data referred to in this *Update* are for the latest month to which that data is available, e.g. year to end September 2011 is for the period from October 2010 to September 2011. Throughout the report when a new dataset is presented the end month is established, and then for simplicity each period is referred to solely by the year in which it ends.

This *Update* covers three separate dates of migration data releases:

- 22 May 2014: provisional international migration data for year ending December 2013 and release of latest National Insurance Number registrations for year ending March 2014;
- 29 May 2014: short-term international migration data for year ending June 2012; and
- 26 June 2014: internal migration for year ending June 2013.

The next scheduled release of data is 28 August 2014.

This *Update* covers the following:

- Internal migration;
- International migration;
 - Long-Term International Migration (LTIM)
 - International Passenger Survey (IPS)
 - Comparison of LTIM and IPS data
 - EU8 citizens
 - Citizenship
 - Reasons for migration
- National Insurance Number (NINo) allocations;
- 'Flag 4' GP registrations; and
- Short-term international migration.

Definitions of key terms used in this *Update* can be found at the end of the document. All data can be found in the accompanying Excel workbook located on the Migration Indicators Datastore homepage (<http://data.london.gov.uk/datastore/package/migration-indicators-0>).

Internal migration

Most recent update: Year ending June 2013 (released June 2014).

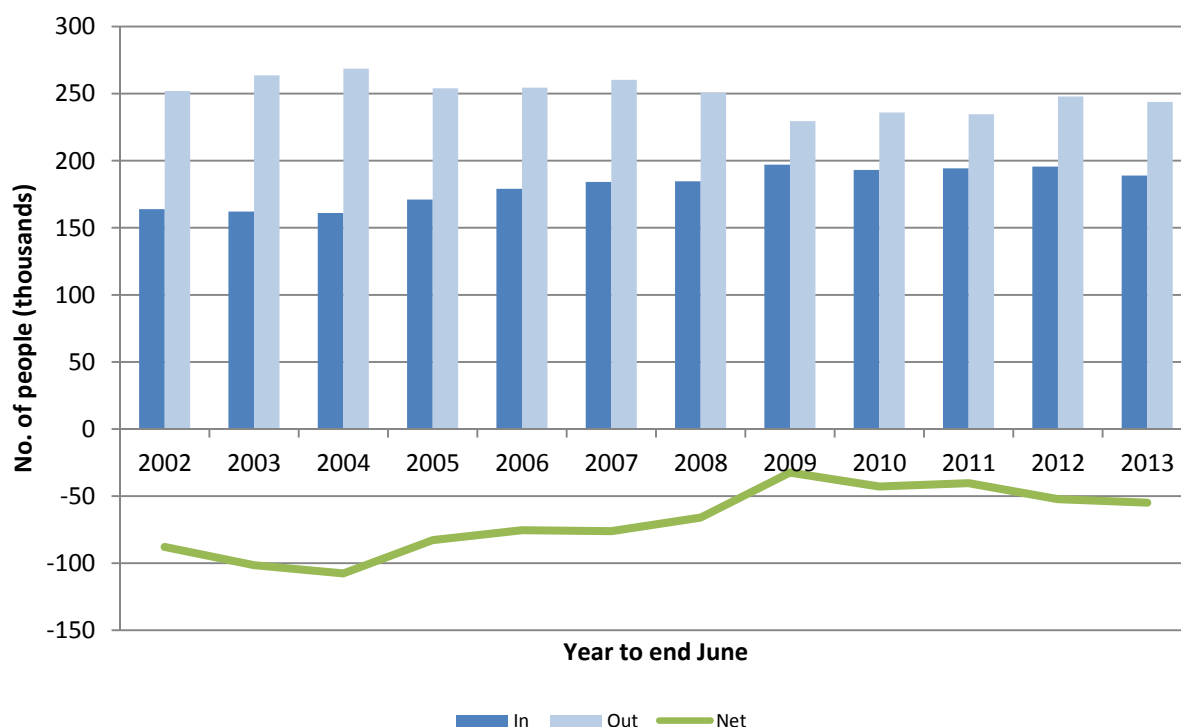
Next update: Year ending June 2014 (released June 2015).

The most recent release of data was for the year ending June 2013. Figure 1 shows that inflows to London from England & Wales in 2013 fell slightly by some seven thousand to reach 189 thousand. This is the lowest level in terms of inflows to London since 2008.

Outflows from London also fell slightly in 2013 (by four thousand) to nearly 244 thousand people. Despite this drop, outflows are still considerably higher than the 2009 outflow of 230 thousand.

Net flow remains negative with more people leaving London than arriving and the larger fall in inflows compared to outflows has contributed to the increase in negative net flow.

Figure 1: Internal (England & Wales) migration, London, 12-month periods ending June of year given, thousands



Source: NHSCR moves and HESA data within England & Wales, ONS/PRDS

International migration

Most recent update: Year ending December 2013 (released May 2014).

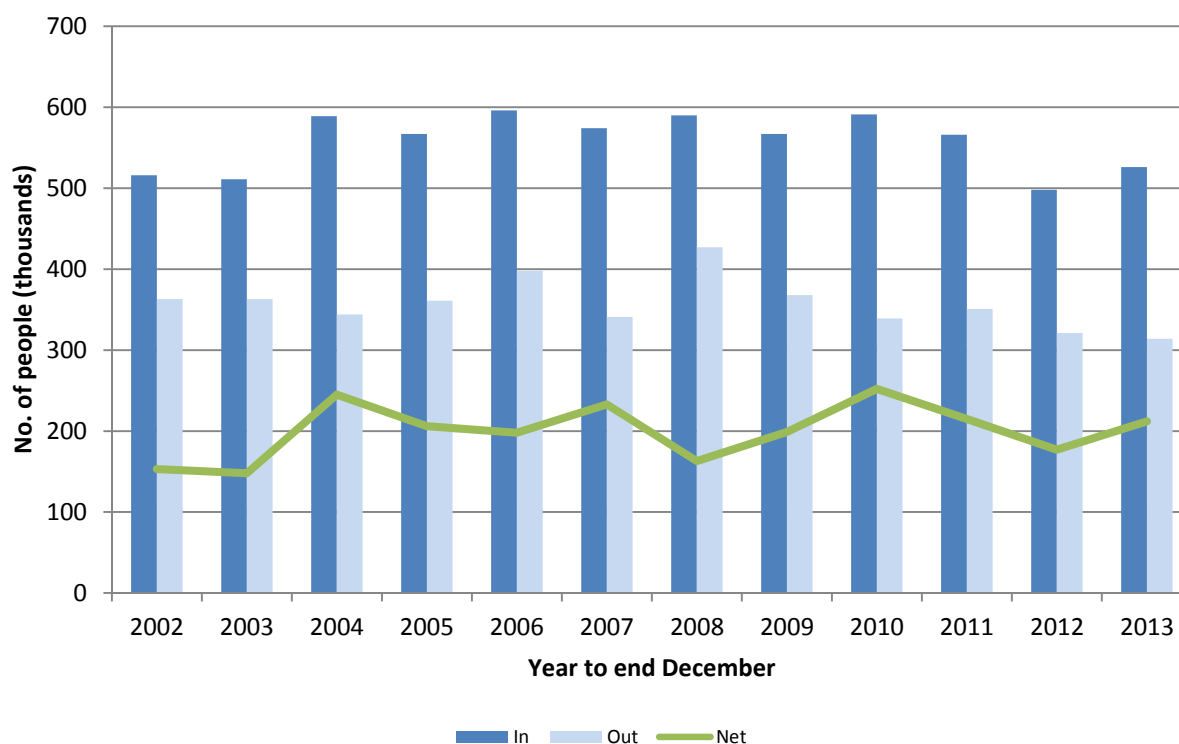
Next update: Year ending March 2014 (released August 2014).

Long-Term International Migration (LTIM)

As part of the most recent release, ONS issued provisional LTIM data for the year ending December 2013.

Figure 2 shows that inflows into the UK rose by 28 thousand in 2013 to reach 526 thousand. This is the first increase in inflows seen since 2010. Outflows fell slightly to 314 thousand people; down by seven thousand from the previous year. The rise in inflows resulted in net UK migration increasing to reach 212 thousand people, up 35 thousand from the previous year.

Figure 2: Long-Term International Migration, UK, 12-month periods ending December of year given, thousands

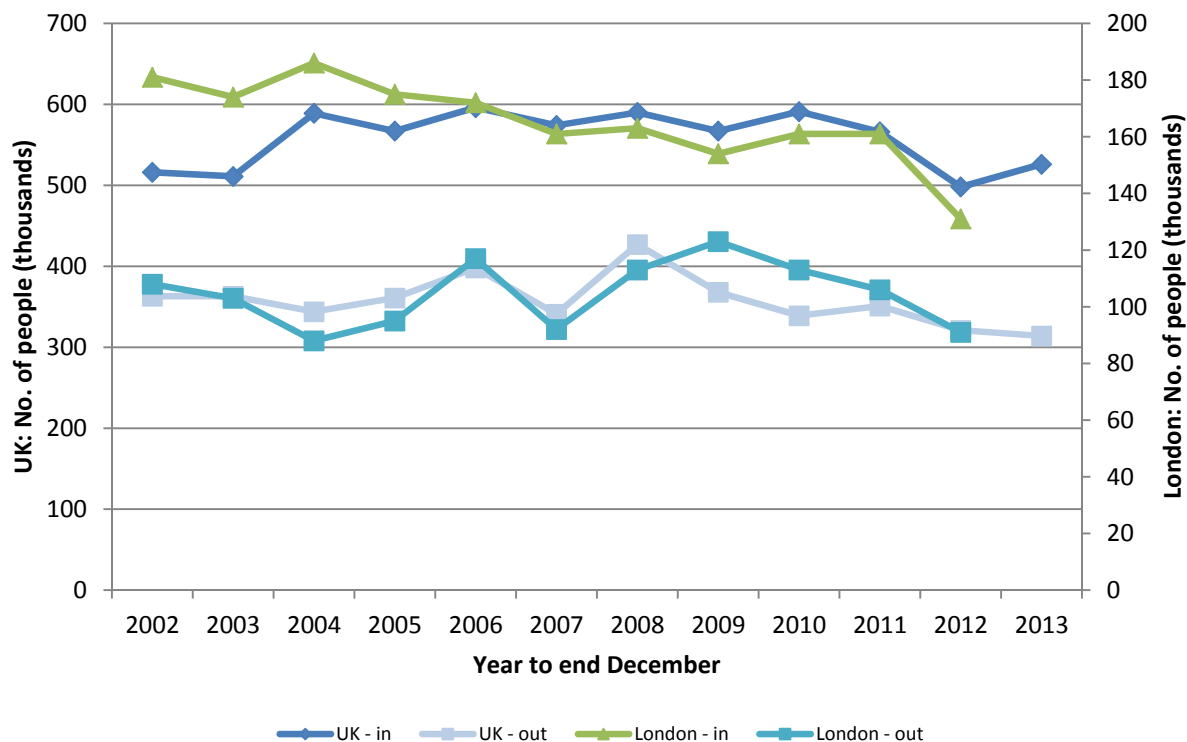


Source: Long-Term International Migration (LTIM) estimates, ONS

Figure 3 compares UK and London inflows and outflows. The most recent London level data remains as at December 2012. London level data will be released as part of ONS's final LTIM release in November 2014. However Figure 3 includes the most recent UK level data (2013).

Both UK and London inflows dropped considerably in 2012 when compared to 2011. In 2011 London inflows were just above 160 thousand. These dropped by 30 thousand to 131 thousand in 2012 reaching their lowest level over the period since 2002. UK inflows fell by 68 thousand over the same period to nearly 500 thousand; their lowest level over the period since 2002. UK inflows have however risen in 2013 to over 520 thousand although this still remains below the levels seen since 2004 (with the exception of 2012).

Figure 3: International migration based on LTIM, London and UK, 12-month periods ending December of year given, thousands



Source: Long-Term International Migration (LTIM) estimates, ONS

As was the case with inflows, outflows for both the UK and London also fell. London outflows continued their downward trend from a high of 123 thousand in 2009 to 91 thousand in 2012; a drop of 15 thousand since 2011. UK outflows saw a slight increase in 2011 before dropping in 2012 to their lowest level over the period at just over 320 thousand. UK outflows continued to fall in 2013 to a new low of 314 thousand.

Despite the fall in both in and outflows, UK and London net flow for 2012 remains positive indicating that more people are moving to the UK and London than leaving. In spite of remaining positive, net flow in both areas fell when compared to 2011; there was a reduction of 38 thousand for the UK and 15 thousand for London.

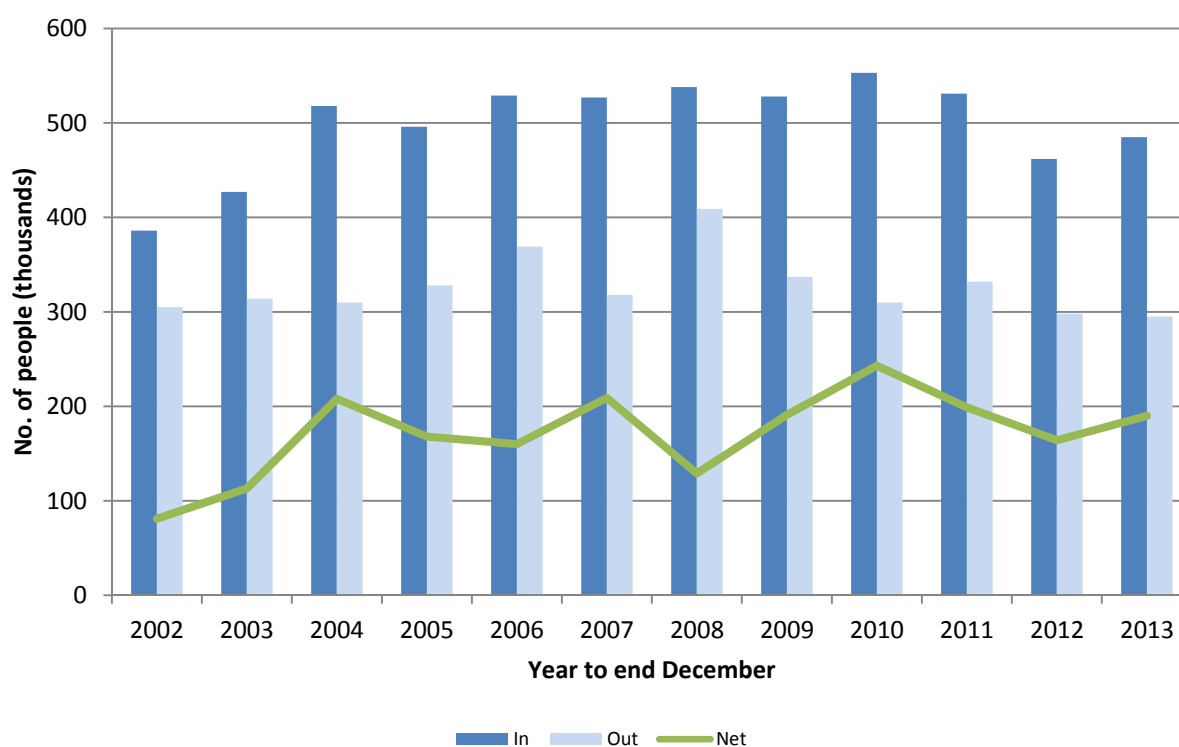
London's flows as a percentage of UK flows for 2012 fell by some two per cent. For inflows this dropped to just over 28 per cent and for outflows, to some 26 per cent. Net flow also fell from 25.6 per cent to 22.6 per cent.

International Passenger Survey (IPS)

IPS estimates provide an alternative source of information on international migration and are based on a sample survey of passengers arriving and departing from UK airports, seaports and the Channel Tunnel. They form part of the LTIM estimates.

IPS estimates of international migration for 2013 show in-migration has risen by 23 thousand people from the previous year to 485 thousand in 2013 (Figure 4). Outflows however have fallen slightly to 295 thousand; their lowest level over the period December 2002 to 2013. Net flow remains positive and has risen by 26 thousand people but is still considerably lower than the high of 243 thousand people in 2010. This is the same pattern as that seen in the LTIM estimates.

Figure 4: International migration based on IPS, UK, 12-month periods ending December of year given, thousands

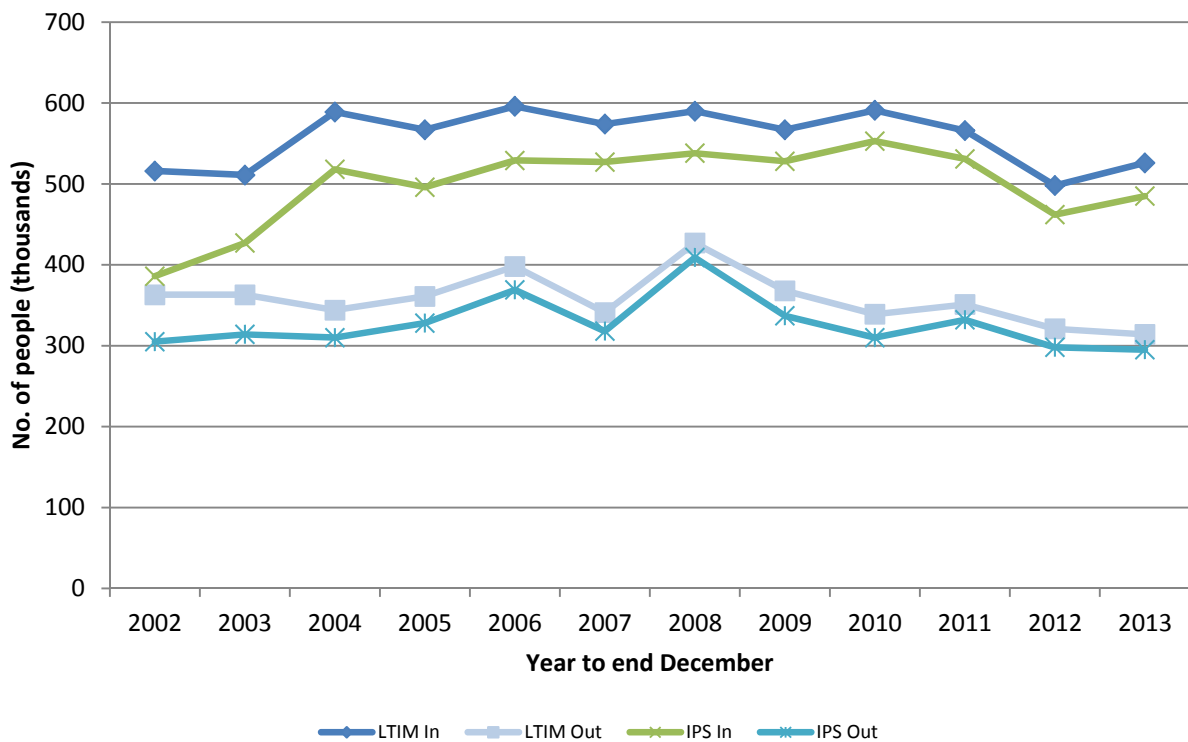


Source: International Passenger Survey (IPS) estimates, ONS

Comparison of LTIM and IPS

Figure 5 shows in and out-migration for both LTIM and IPS data between 2002 and 2013. The LTIM data for both in and out-migration are higher, which is to be expected as they are adjusted to take into account other data sources such as asylum seekers and those migrating to/from Northern Ireland. However both sets of data follow the same trend with there being larger difference in inflows than outflows.

Figure 5: International migration based on LTIM and IPS data, UK, 12-month periods ending December of year given, thousands



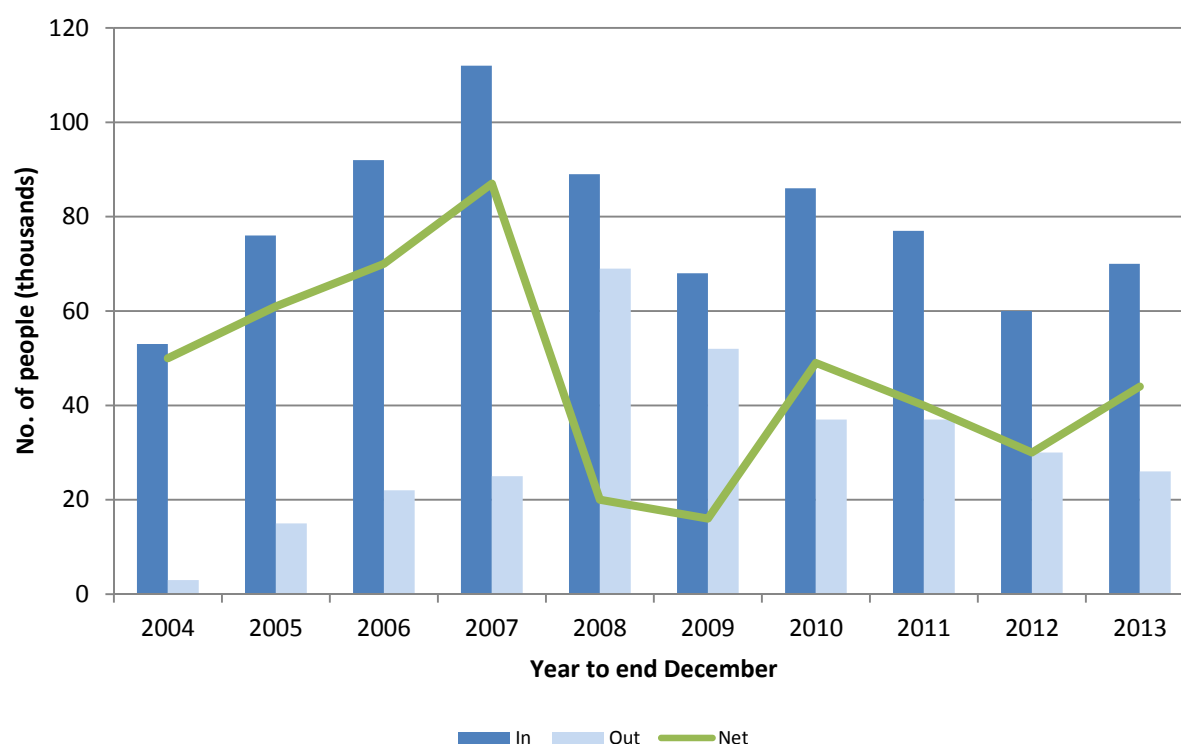
Sources: Long-Term International Migration (LTIM) and International Passenger Survey (IPS) estimates, ONS

EU8 citizens

Figure 6 shows that the number of EU8¹ citizens migrating into the UK rose in 2013 to 70 thousand from 60 thousand the previous year. The number of in-migrants still remains considerably below the high of 112 thousand seen in 2007. Outflows continued to fall for the second consecutive year reaching 26 thousand; a drop of four thousand compared to the previous year.

Despite the continued fall in outflows, the rise in inflows meant that net migration rose from 30 thousand to 44 thousand. This is however only less than half the peak net flow of 87 thousand seen in 2007.

Figure 6: Migration of EU8 citizens, UK, 12-month periods ending December of year given, thousands



Source: Long-Term International Migration (LTIM) estimates, ONS

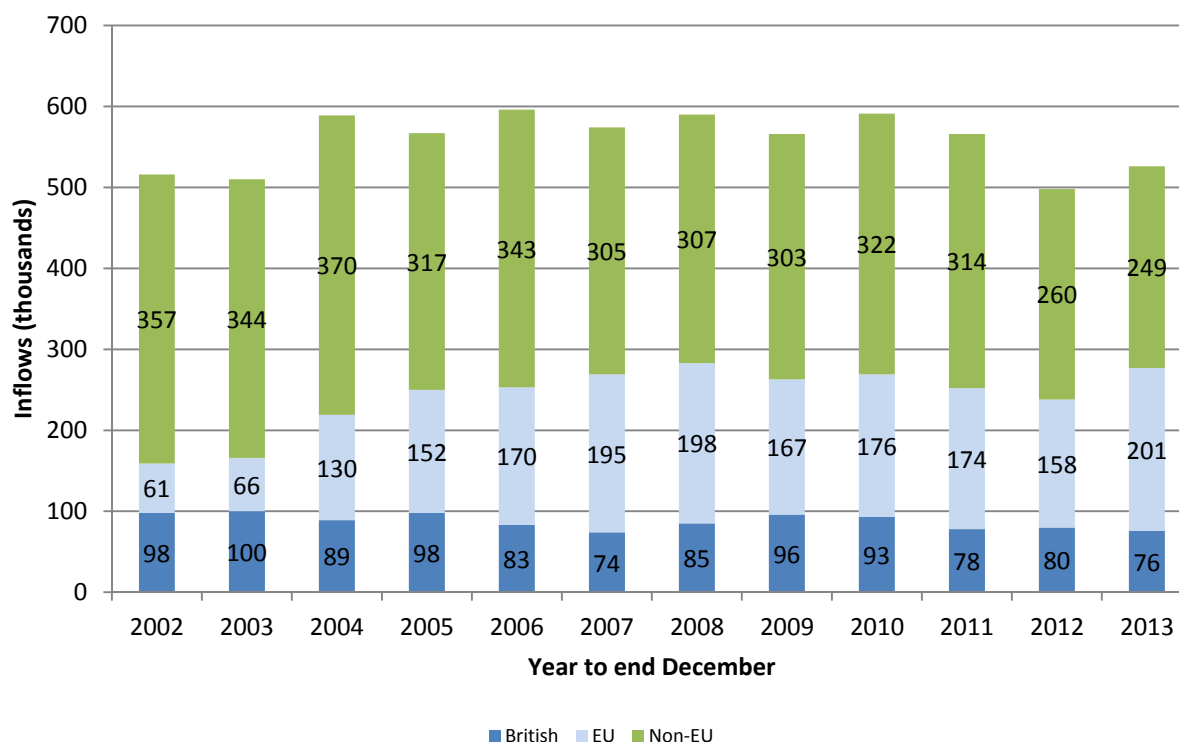
In 2007 over half (57 per cent) of migrants to the UK from the EU were from EU8 countries. By 2013 this had dropped to 35 per cent.

¹ See Key Terms and Definitions for a list of countries in the EU8

Citizenship

Data on migrants' citizenship is released as part of the LTIM data. Figure 7 shows the split of British, EU and Non-EU in-migrants to the UK. For the year ending December 2013, the number of non-EU migrants has fallen by 11 thousand from the previous year and by 73 thousand since 2010. The number of EU in-migrants has risen by 43 thousand over the past year. British in-migrants have remained at a similar level for the past three years at some 80 thousand.

Figure 7: Citizenship of in-migrants, UK, 12-month period ending December of year given, thousands

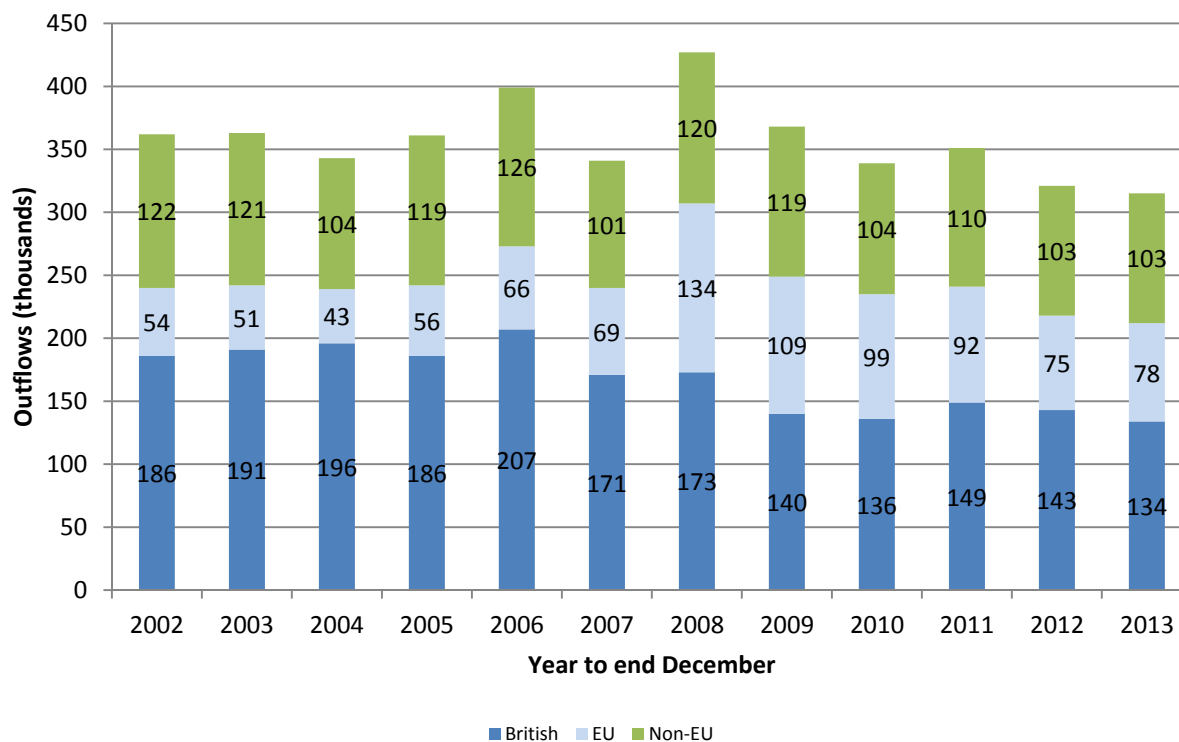


Source: Long-Term International Migration (LTIM) estimates, ONS

The proportion of British in-migrants as a percentage of total in-migrants has remained relatively stable between 2002 and 2013 at between 14 and 19 per cent. The proportion of EU in-migrants has however more than doubled; from 11.8 per cent in 2002 to 33.6 per cent in 2008 followed by a slight fall before rising again in 2013 to a peak of 38.1 per cent. This is partly explained by the expansion of the EU over this period. Non-EU in-migrants have seen the opposite pattern with the proportion falling from nearly 70 per cent in 2002 to only 47.3 per cent by 2013.

British out-migrants are the only group to have seen a drop in numbers between 2012 and 2013; a decrease of nine thousand to 134 thousand (Figure 8). EU out-migrants rose over this period by three thousand whereas non-EU out-migrants remained the same at 103 thousand.

Figure 8: Citizenship of out-migrants, UK, 12-month period ending December of year given, thousands



Source: Long-Term International Migration (LTIM) estimates, ONS

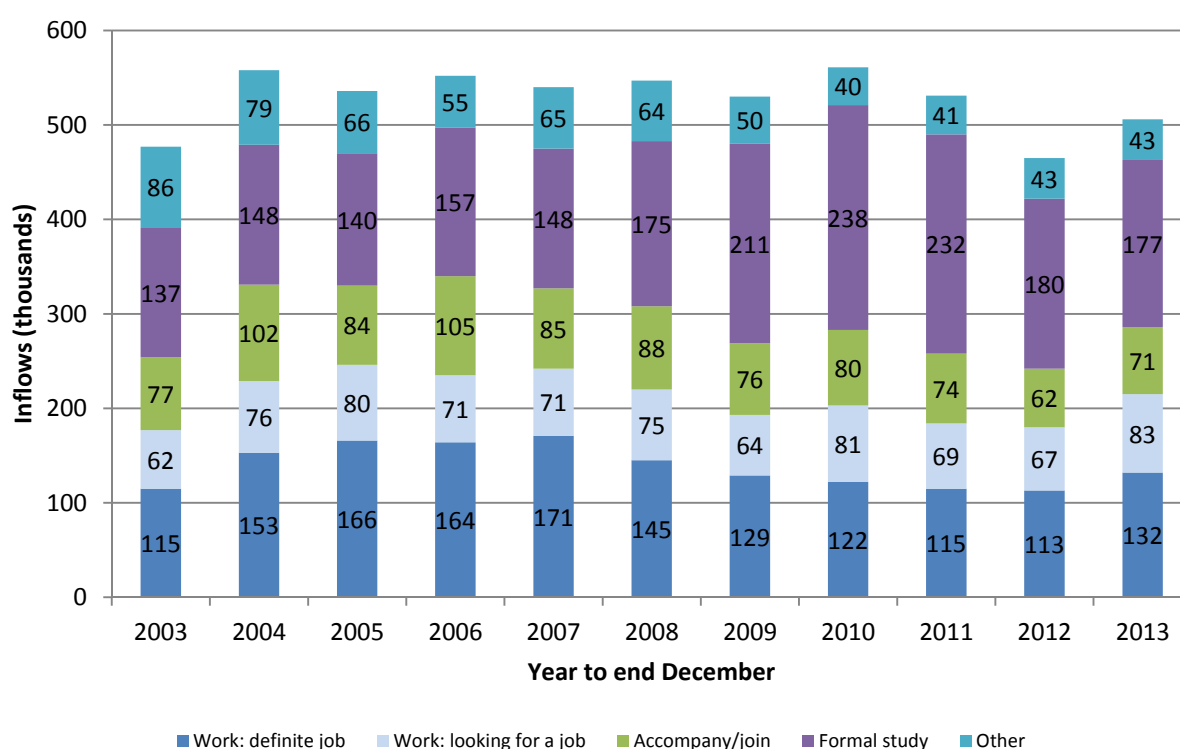
Out-migrants show a different pattern in terms of proportion compared to in-migrants. The proportion of British out-migrants as a total of all out-migrants has fallen by some ten per cent between 2002 and 2013. Non-EU out-migrants have remained relatively stable at around 30 per cent over the period whereas EU out-migrants have seen a considerable rise from less than 15 per cent in 2002 to a peak of a 31.4 per cent in 2008. Since 2008, the proportion of EU out-migrants has fallen year on year to 2012 before rising slightly in 2013 to just under 25 per cent.

Reasons for migration

The most popular reason for in-migration to the UK for the year ending December 2013 continued to be 'formal study' with 177 thousand people migrating to the UK for this reason (Figure 9). This was followed by those with a definite job (132 thousand people). The number of people migrating to the UK for formal study has fallen year on year since 2010 - a drop of 61 thousand people from 238 thousand in 2010.

However, the number of people migrating to the UK because of a definite job has risen from 113 thousand in 2012 to 132 thousand in 2013 as has the number migrating to look for a job (up 16 thousand since 2012). There has also been a rise in the number of people (nine thousand) migrating to the UK to accompany/join someone since 2012.

Figure 9: Reasons for in-migration, UK, 12-month periods ending December of year given, thousands

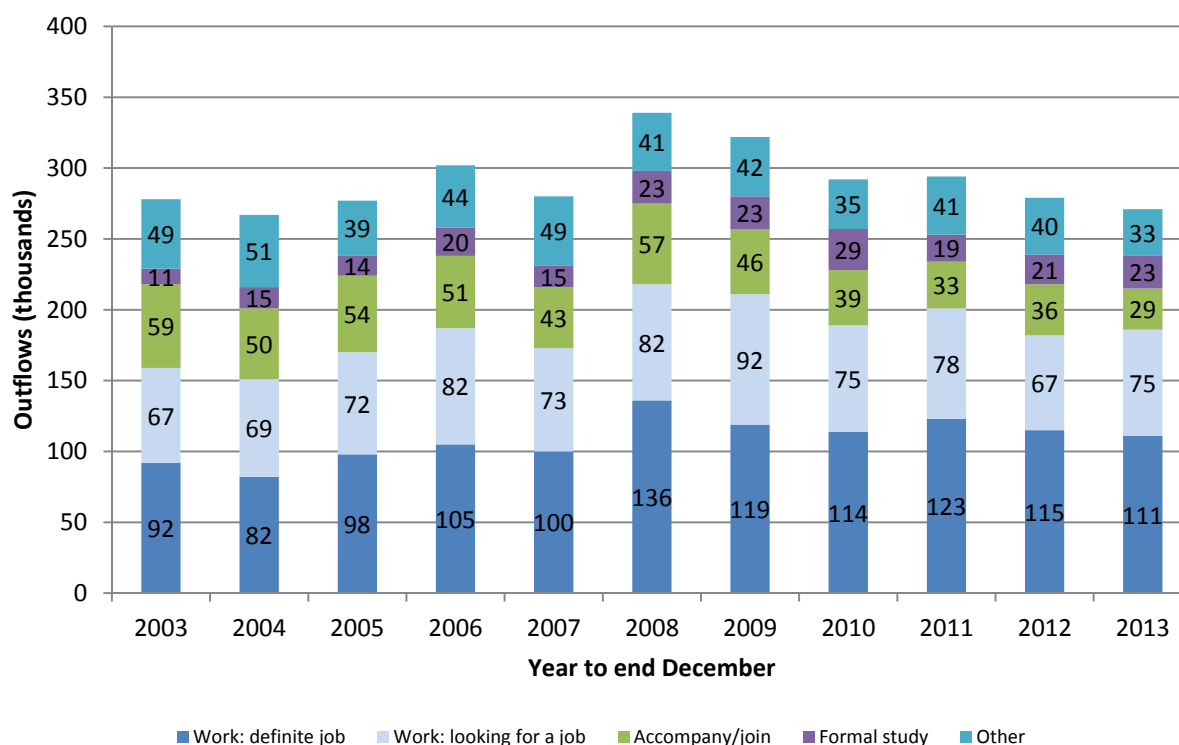


Source: Long-Term International Migration (LTIM) estimates, ONS

When comparing the number of in-migrants by reason for migration as a percentage of total in-migrants, the largest differences can be seen in the 'formal study' category. In 2003 28.7 per cent of in-migrants gave 'formal study' as their reason for coming to the UK. This rose throughout the 2000s and early 2010s to a high of 43.7 per cent of all in-migrants in 2011. It has since declined year on year and by 2013, only 35.0 per cent of in-migrants gave this as their main reason. The proportion of those migrating to the UK for 'other' reasons more than halved from 18.0 per cent in 2003 to 8.5 per cent by 2013. There was little proportional change amongst the other categories.

In terms of out-migration, 111 thousand people left the UK in 2013 because of a definite job (Figure 10). This is a slight fall of four thousand compared to 2012 and considerably lower than the 136 thousand who left in 2008 and the 123 thousand in 2011. The number leaving the UK to accompany/join someone or for 'Other' reasons also decreased, both by some seven thousand.

Figure 10: Reasons for out-migration, UK, 12-month periods ending December of year given, thousands



Source: Long-Term International Migration (LTIM) estimates year ending December 2013, ONS

The percentage of out-migrants leaving the UK because of a definite job has shown an upward trend between 2003 and 2013 rising from 33.1 per cent to 41.0 per cent by 2013. The opposite is the case for those leaving the UK to accompany/join someone and for those migrating due to an 'other' reason. Both these reasons have seen an overall downward trend over the period.

The reason for emigrating can be different to the original reason for immigrating to the country and consequently it is not possible to compare Figures 9 and 10 directly.

National Insurance Number (NINo) allocations

Most recent update: *Year ending March 2014 (released May 2014).*

Next update: *Year ending March 2015 (released May 2015).*

All NINo data is for the 12 months ending March of the year given. This is the first release of NINo allocation data after the removal of temporary work restrictions in January 2014 for Bulgaria and Romania (EU2).

The total number of NINo registrations in the UK rose in 2014 by some 37 thousand to nearly 600 thousand compared with the previous year. This is the first year there has been a rise in NINo allocations in the UK since 2011 and the number of registrations is nearly on par with 2012.

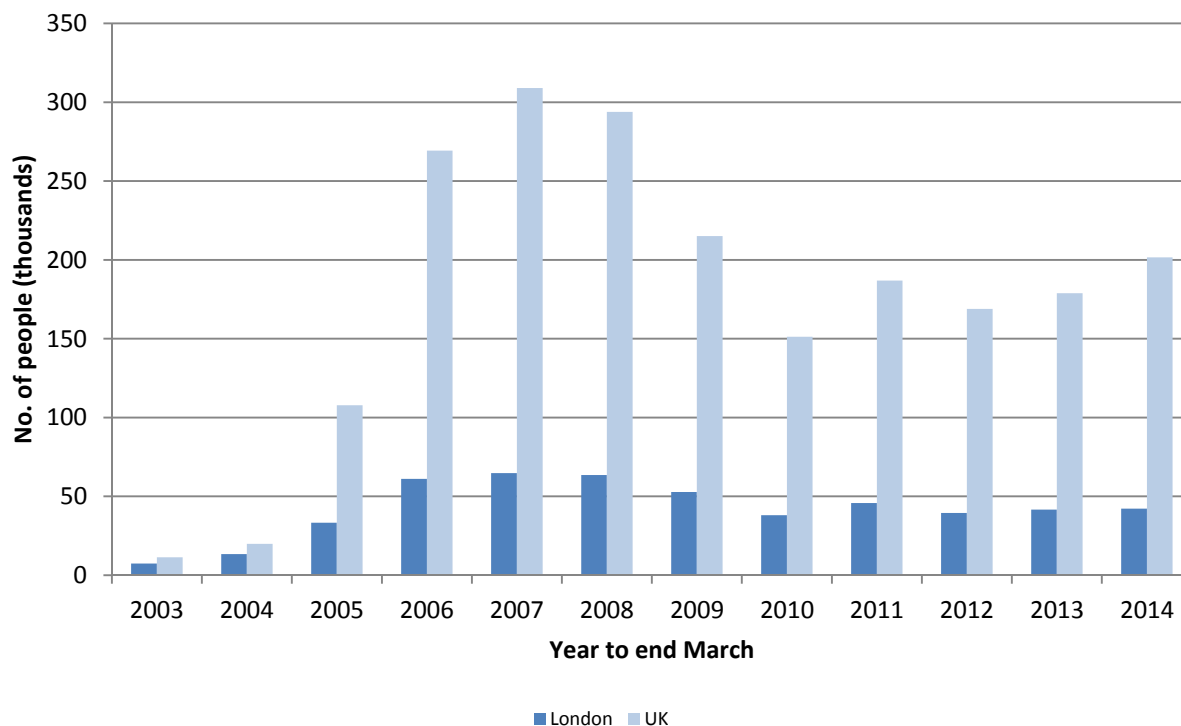
Registrations in London in 2013 also rose compared with 2012 by 17 thousand to 243 thousand and show a similar pattern to those for the UK as a whole.

Enlargement of the EU in 2004 resulted in much higher numbers of NINo registrations in both the UK and London with the UK experiencing a rise of more than 50 per cent in the number of NINo registrations in 2006 compared to 2005. The same trend was also observed in London with a slightly lower rise of 39 per cent.

Figures 11 and 12 show the trends for EU8 and EU2 nationals. NINo registrations to EU8 nationals peaked in 2007 with 309 thousand registrations in the UK of which nearly 65 thousand (20.9 per cent) were in London. However while the number of registrations in both areas fell in subsequent years, the number of registrations in London as a proportion of those in the UK rose to a high of 25.1 per cent in 2010. The most recent year of data shows there were nearly 202 thousand NINo registrations to EU8 nationals in the UK of which 42 thousand (21.0 per cent) were in London. This is a considerable increase in the number of registrations in the UK; up nearly 23 thousand on the previous year although still over 100 thousand lower than the peak in 2007. Even though allocations in London rose, this growth accounted for only some 600 new registrations.

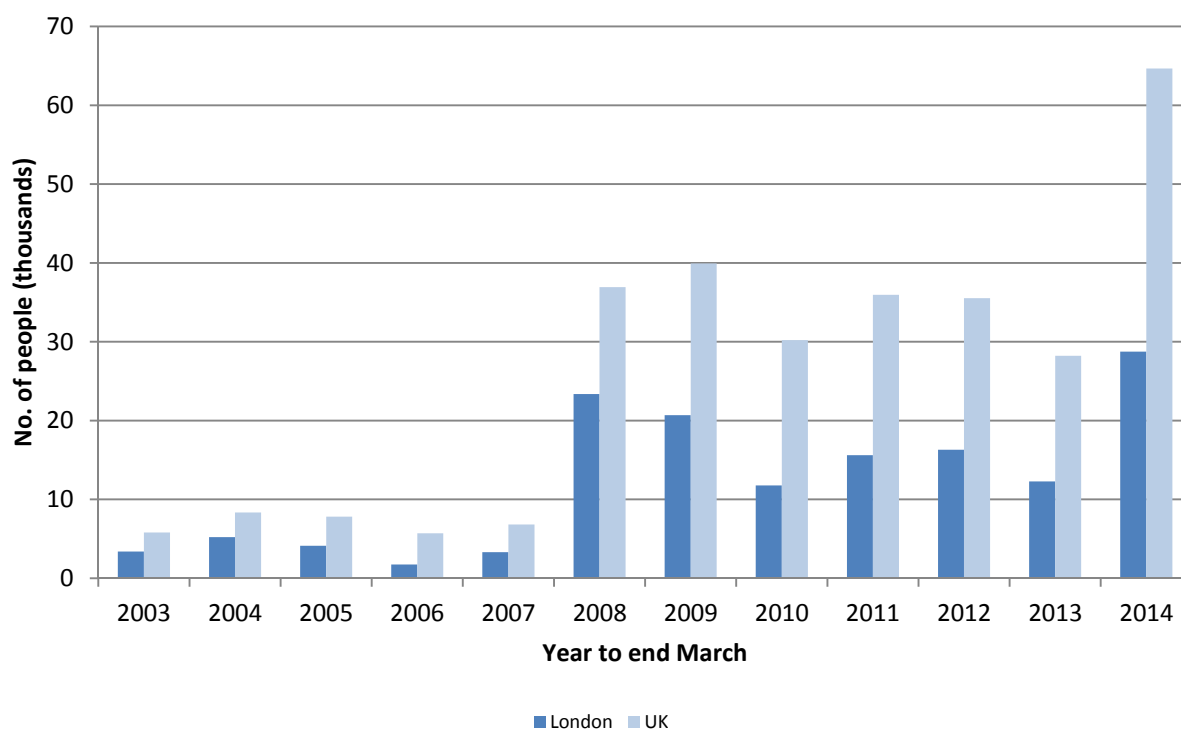
Registrations of EU2 nationals increased in 2008 the year following accession of these countries to the EU. It then nearly halved in number to reach only 12 thousand in London in 2013. However, in 2014 the number of allocations in London to those from EU2 countries rose to nearly 29 thousand; up over 16 thousand from the previous year. The UK as a whole saw a rise as well from 28 thousand in 2013 to nearly 65 thousand in 2014. Despite this considerable increase, the number of registrations to EU2 nationals in London as a percentage of those in the UK remained relatively consistent at 45 per cent.

Figure 11: National Insurance Number allocations to EU8 citizens, UK and London, 12-month periods ending March of year given, thousands



Source: NI/No registrations to adult overseas nationals entering the UK, DWP

Figure 12: National Insurance Number allocations to EU2 citizens, UK and London, 12-month periods ending March of year given, thousands



Source: NI/No registrations to adult overseas nationals entering the UK, DWP

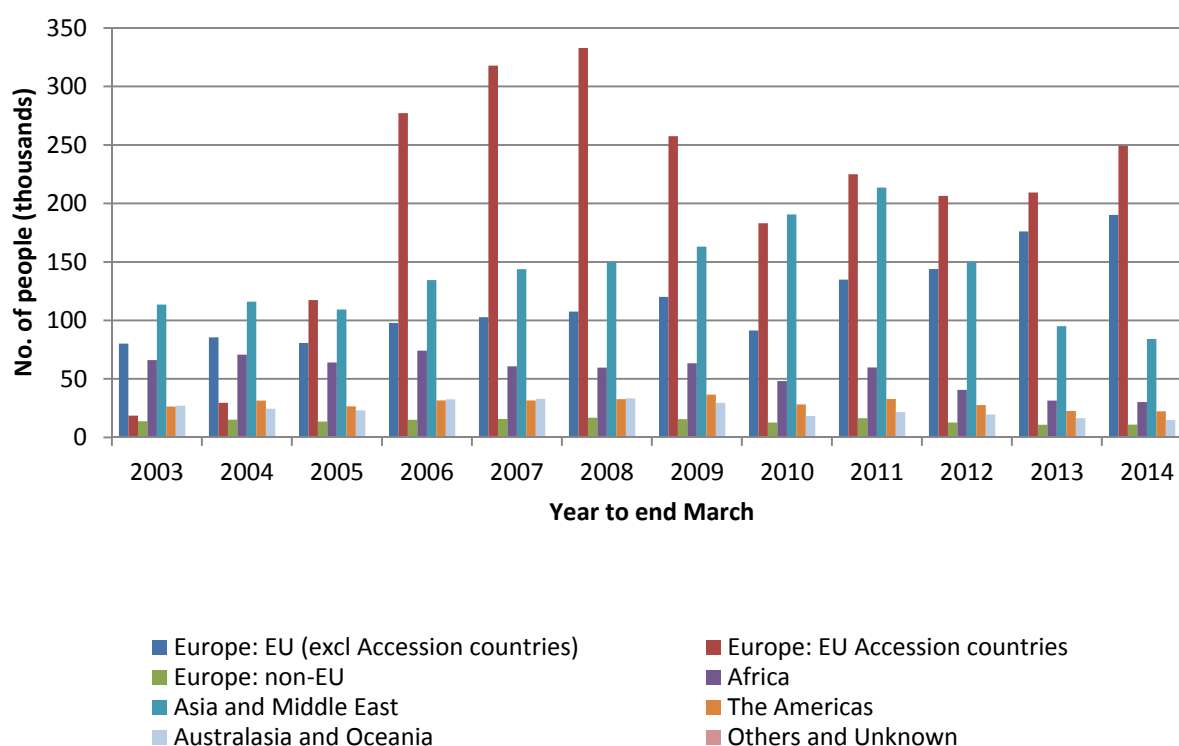
Figure 13 shows that the most registrations to nationals from overseas in 2014 were to those from EU accession countries² accounting for 249 thousand registrations in the UK. This is however a considerable drop from a peak of 333 thousand registrations in 2008. Registrations to this group of countries saw a rise of 19.5 per cent (up nearly 40 thousand) from the previous year.

Registrations to EU countries (excluding Accession countries) rose for the fourth year in a row to reach over 190 thousand (up 14.1 per cent from the previous year).

NINo registrations to Asian and Middle Eastern nationals continued to fall to reach 84 thousand, some 11 thousand lower than in 2013 and over 129 thousand lower than the peak number of registrations to these nationals in 2011. This is the lowest number of registrations for this group over the period from 2003.

For consistency of reporting, the registration data released by DWP for EU Accession countries includes EU8, Malta, Cyprus, Croatia and EU2 (Bulgaria & Romania) for the entire back series including the periods before Accession and after transitional arrangements have ended. Data for these countries are then removed from the Europe: non-EU figures even for the years prior to Accession.

Figure 13: National Insurance Number allocations by geographical area, UK, 12-month periods ending March of year given, thousands



Source: NINo registrations to adult overseas nationals entering the UK, DWP

² In this instance EU Accession countries include the EU8 plus Cyprus and Malta, the EU2 and Croatia. The data has been backdated to pre-accession for comparison purposes.

'Flag 4' GP registrations

Most recent update: Year ending June 2012 (released August 2013).

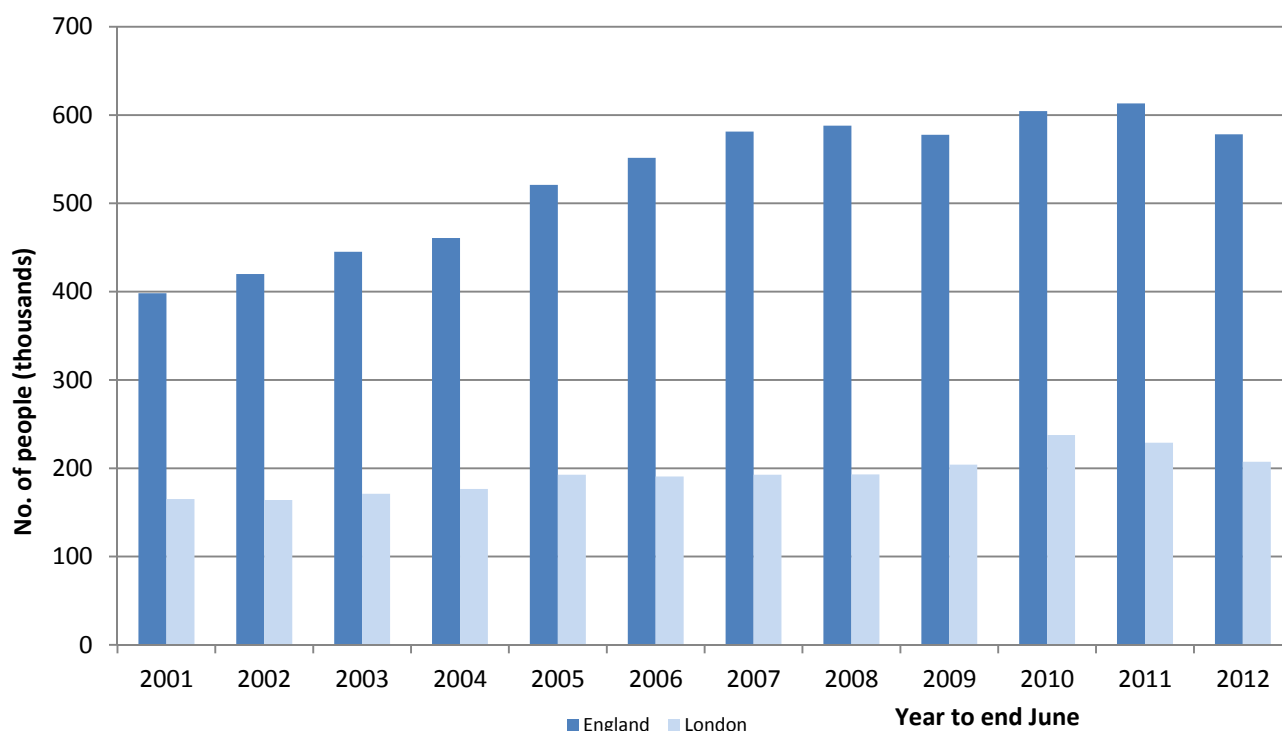
Next update: Year ending June 2013 (released August 2014).

'Flag 4' data provides an indication of recent international in-migrants to an area through registrations with a GP. The data is released annually for both England and London and covers the period July to June of each year.

Figure 14 shows the number of 'Flag 4' registrations between 2001 and 2012 for both London and England. Overall, the numbers show that registrations in England have been rising since 2001 with the exceptions of a slight decline in both 2009 and 2012. There was an decrease of 35 thousand registrations between 2011 and 2012 taking the total number of 'Flag 4' registrations to 578 thousand (2012). This is comparable to 2009 levels.

London registrations have also shown a rising trend peaking at nearly 238 thousand in 2010. However, unlike England registrations, those for London have continued to fall since this peak to now reach 207 thousand; a drop of 22 thousand from the previous year. London's percentage share of registrations has fallen to 35.9 per cent from 37.4 per cent the preceding year and a high of 41.5 per cent in 2001.

Figure 14: 'Flag 4' registrations, London and England, 12-month periods ending June of year given, thousands



Source: 'Flag 4' GP registrations, ONS/PRDS

Short-term international migration

Most recent update: Year ending June 2012 (released May 2014).

Next update: Year ending June 2013 (released May 2015).

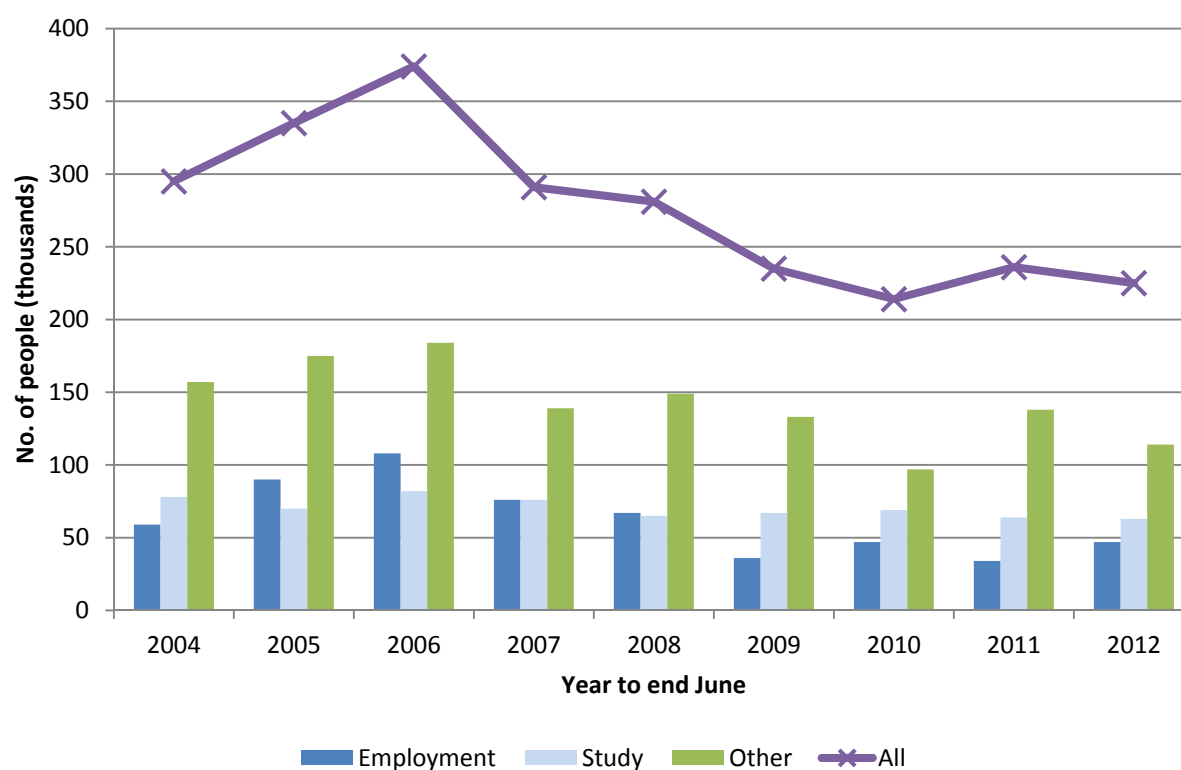
Short-term international migration (stays of less than 12 months) data is released annually for England & Wales for the period ending June of each year. The number migrating for employment rose year-on-year between 2004 and 2006 (Figure 15). It then fell for three consecutive years to 36 thousand before fluctuating. The latest figures released for 2012 show that the number who migrated for employment purposes rose compared to 2011 to 47 thousand; an increase of 13 thousand.

The number migrating for study has also fallen since 2006. In 2012 it saw only a slight drop of one thousand to reach a low of 63 thousand over the period 2004 to 2012.

Short-term international migration largely consists of those migrating for reasons other than employment or study. In 2012, just over half of all short-term migrants gave a reason which was neither employment nor study. 'Other' includes those migrating for 'other employment' (those visiting an existing employer) and 'other' reasons (see Key Terms and Definitions at the end of this *Update*).

In total, 225 thousand people migrated to England & Wales for between 3 and 12 months in 2012. This is a fall of 11 thousand from the previous year.

Figure 15: Short-term migrants (3-12 months) inflows by reason, England & Wales, 12-month periods ending June of year given, thousands



Source: Short-term migration estimates, ONS

Key terms and definitions

Internal migration

Estimates of migration within England & Wales are mainly based on patient re-registrations (National Health Service Central Register [NHSCR]) and are released in cumulative 12-month periods. This tracks people's moves every time they re-register with a GP. However, not everyone will register with a GP every time they move. Certain groups of people are more likely to register (such as children and the older population) particularly those with a need for routine medical care and advice. The data also includes a student adjustment based on HESA (Higher Education Statistics Agency) data.

Long-Term International Migration (LTIM)

This is considered the most comprehensive estimate of international long-term migration. It is based on the IPS with adjustments made to take into account "*asylum seekers, migration to and from Northern Ireland and people whose length of stay changes from their original intentions*".

Interpolated LTIM data

Figures for years ending March and September for each year in the period to December 2009 have been interpolated by ONS. They are provided solely as an indication and should not be used.

Citizenship

The member countries of the European Union have altered over the period covered by the tables and charts. Estimates by citizenship are based upon membership of the relevant groups at the time of migration.

Reason for migration

Respondents are asked to identify their main reason for migration. The data included in this workbook excludes those who did not state a reason for their migration. "No reason stated" includes non-responses and the non-specific responses "Emigrating/Immigrating" and "Returning home to live". The reason for emigrating can be different to the original reason for immigrating to the country and consequently it is not possible to directly compare the data.

International Passenger Survey (IPS)

This is a sample survey of passengers arriving and departing from UK airports, seaports and the Channel Tunnel. ONS releases provisional IPS data so as to provide an indication of any changes in international migration prior to the release of LTIM data. This is because data from outside sources, such as asylum seeker data, which are used in the LTIM estimates are not available until a later date.

EU2

The EU2 comprises Bulgaria and Romania which joined the EU in 2007. They were formerly known as the A2 (Accession 2). Temporary work restrictions for citizens of the EU2 came to an end in January 2014.

EU8

The EU8 is made up of eight countries which joined the EU in 2004 alongside Cyprus and Malta. The EU8 is comprised of Estonia, Latvia, Lithuania, Czech Republic, Hungary, Poland, Slovakia and Slovenia. They were formerly known as the A8 (Accession 8).

EU15

The EU15 is made up of the 15 countries which were members of the EU in 2003. These encompass: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Republic of Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden and UK.

EU25

The EU25 includes all countries that are part of the EU15 and the EU8 as well as Malta and Cyprus.

EU27

The EU27 comprises the EU25 plus the EU2.

EU28

This is the most current grouping and applies from July 2013 onwards. It is made up of the EU27 plus Croatia.

EU (European Union)

The EU in this sense comprises the EU15 up to 2003, the EU25 from 2004 to 2006, the EU27 from 2007 to 2013 and the EU28 from July 2013 onwards. It is therefore not possible to directly compare the figures as the size of the EU has grown over the time period to take into account new member states.

National Insurance Numbers (NINOs)

A National Insurance Number (NINO) is necessary in order to be able to work in the UK and therefore the allocation of new NINOs to overseas nationals by the Department for Work and Pensions (DWP) has become a useful way of monitoring the flow of people 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.

'Flag 4' GP registrations

'Flag 4s' are codes within the Patient Register Data Service (PRDS) held by the NHS. The flag indicates someone who has registered with a GP in England & Wales but was previously living overseas. They provide an indication of recent international in-migrants to an area.

Short-term migration

A short-term migrant is defined by the ONS as "*someone who changes their country of residence for between 1 and 12 months*" although data is also released for those who migrate for between 3 and 12 months. The data analysed covers short-term international migration only.

Short-term migration reasons:

Employment: migrants going to a definite new job which includes au pairs and those seeking a job.

Study: migrants arriving to attend formal study courses, includes both further and higher education.

Other employment: migrants visiting on business for their existing employer.

Other: migrants visiting for other reasons, e.g. holiday, visiting friends and relatives, medical treatment, religious pilgrimage.