

Migration Indicators: February 2011

Background

On 24th February 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 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 increased from the recent low base, reaching 43 thousand in June 2010. This is an increase of 8 thousand since June 2009 but still well below pre-recession values. The outflow of 220 thousand is the fourth consecutive quarterly increase after seven successive quarterly declines since September 2007. The gross inflows were 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. ONS/PRDS

London

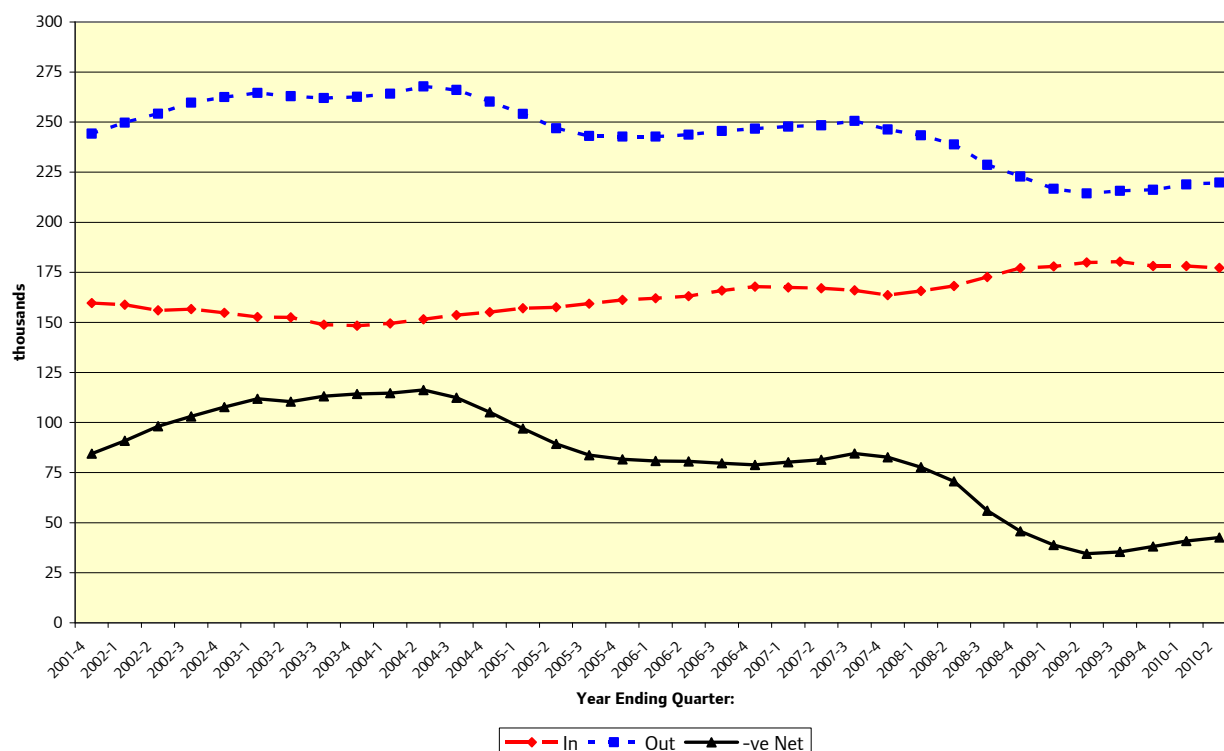
	2002 Q2	2003 Q2	2004 Q2	2005 Q2	2006 Q2	2007 Q2	2008 Q2	2009 Q2	2010 Q2
In	156.0	152.5	151.6	157.6	163.1	167.0	168.2	179.9	177.2
Out	254.2	262.9	267.8	246.9	243.7	248.4	238.8	214.4	219.8
Net	-98.2	-110.4	-116.2	-89.3	-80.6	-81.4	-70.6	-34.5	-42.6
UK	1,268	1,263	1,270	1,213	1,212	1,227	1,190	1,152	1,160

London Flows as % of UK

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

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. 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
In	-	-	17.4	21.5	23.7	24.7	24.0	25.3
Out	-	-	11.4	17.0	19.8	20.5	21.1	22.8
Net	9.2	7.4	6.0	4.5	3.9	4.2	2.9	2.5

International Migration

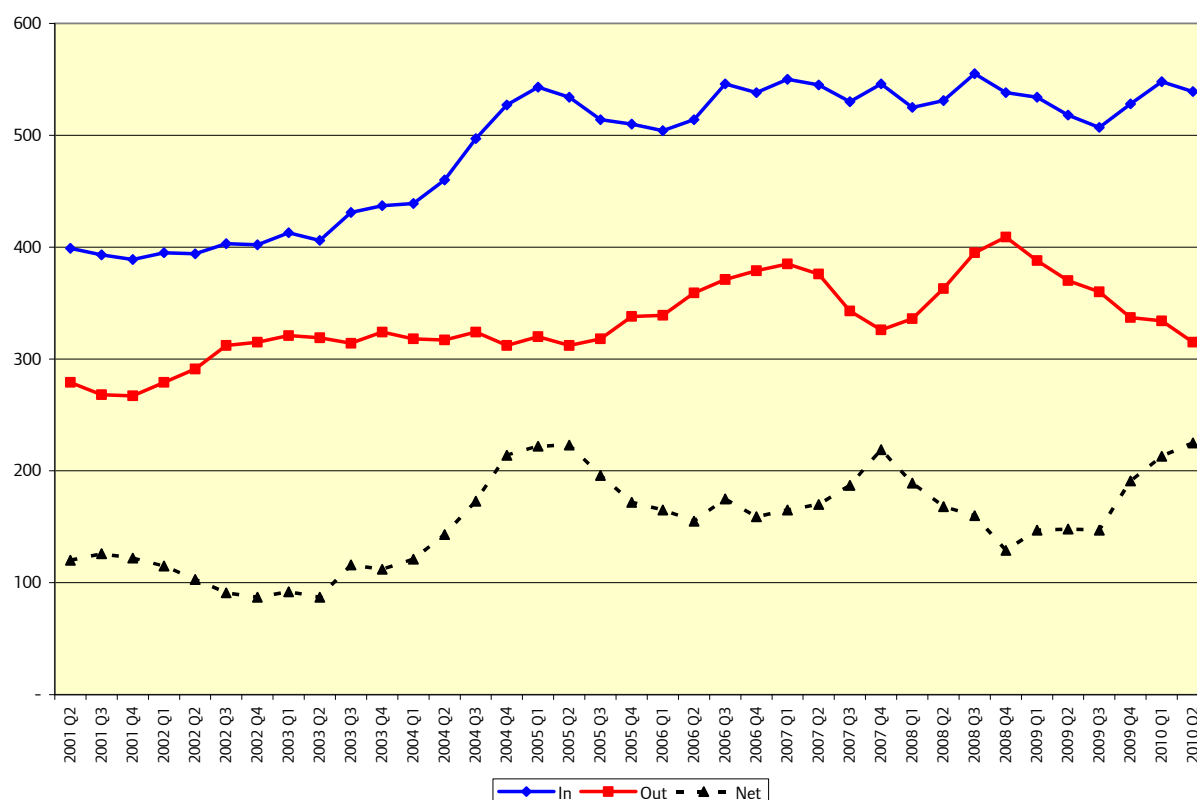
Data on international migration are based on a number of sources, principally the International Passenger Survey (IPS) but also separate estimates of moves to and from the Republic of Ireland (up to 2008 but now included in the IPS), asylum seekers and visitor switchers. The full dataset relates to calendar 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 to mid-2010 and show a significant rise in the net inflow since mid-2009. In the calendar year 2009 London experienced an international inflow of 154 thousand and 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 through the century 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 June 2010 539 thousand persons arrived in the UK and 315 thousand persons left. The net inflow therefore increased to 225 thousand. The rising trend of net immigration to the UK over the last year and a half has been driven by the reduction in the annual outflow of nearly 100 thousand persons. The reduction in outflow from the UK reflects the new diffidence in British Citizens willingness to move overseas; in 2006 over 200 thousand did so but only 114 thousand in the year to mid-2010. 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 data. ONS.

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

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

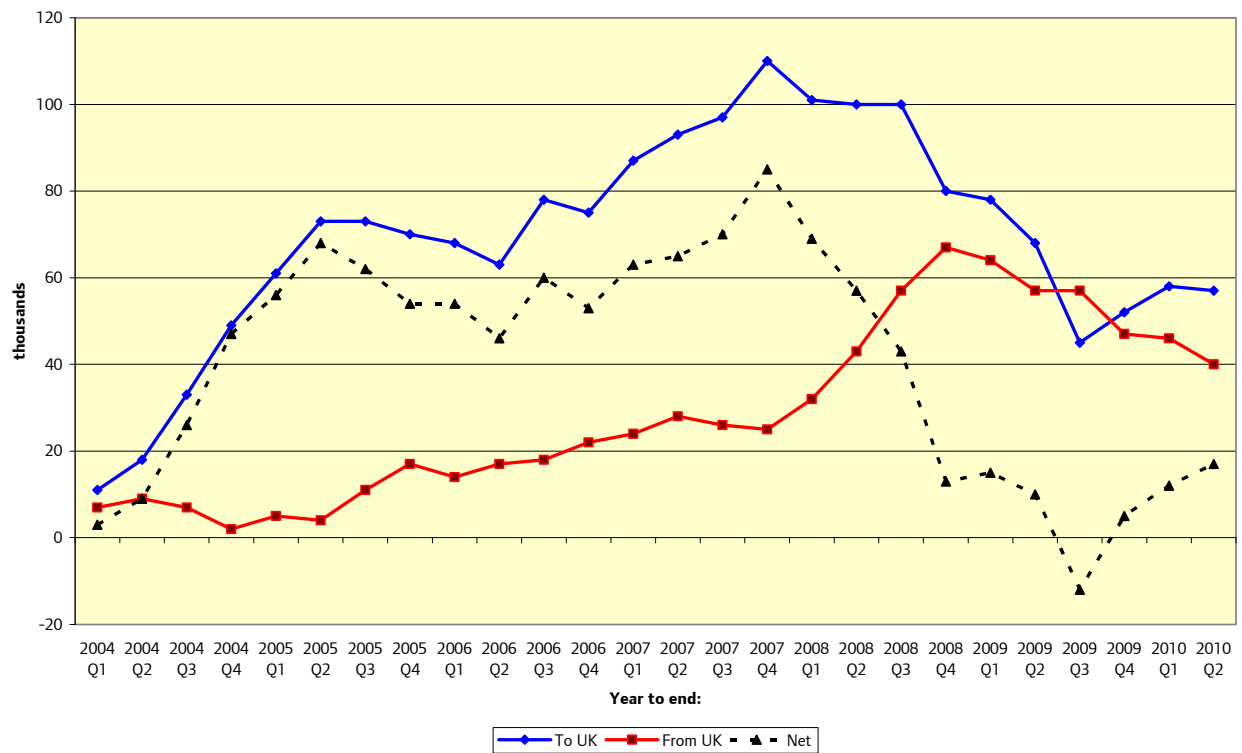


Recent international flows show a significant change in the numbers of citizens of the A8 Eastern European countries that acceded to the EU in 2004. The trends in inflows and outflows of A8 citizens since mid-2003 are shown in Table 4 and Chart 3. The year to mid-2010 confirmed the continued low level in the gross inflow to the UK from the peak of 101 thousand in the year to March 2008 down to 57 thousand. The number of return migrants, however, continued to decline (to 40 thousand) having peaked at 67 thousand in 2008. The net flow into the UK has remained below 20 thousand a year for the last seven quarters, having plummeted from 85 thousand in 2007.

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	2010 Q2
To UK	18	73	63	93	100	68	57
From UK	9	4	17	28	43	58	40
Net	9	68	46	65	57	10	17

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 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 Q3
Total	UK	346.2	373.5	435.4	663.1	705.8	733.1	686.1	572.7	623.4
	London	149.6	157.4	169.7	235.4	240.9	272.7	275.6	249.2	
		2003 Q1	2004 Q1	2005 Q1	2006 Q1	2007 Q1	2008 Q1	2009 Q1	2010 Q1	2010 Q3
EU A8	UK	11.4	19.9	107.8	269.3	309.0	293.8	215.2	151.3	160.9
	London	5.8	8.4	33.2	61.0	64.6	63.4	52.8	38.0	
		2003 Q1	2004 Q1	2005 Q1	2006 Q1	2007 Q1	2008 Q1	2009 Q1	2010 Q1	2010 Q3
Bulgaria & Romania	UK	5.8	8.4	7.8	5.7	6.8	36.9	39.9	30.2	29.1
	London	3.8	5.2	4.2	1.7	3.4	23.4	20.7	11.8	

The total number of new NINos issued in the year to September 2010 rose to 623 thousand, an increase of over 50 thousand in six 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 slightly to 161 thousand. In London, up to March 2010, total new NINo registrations, including those of A8 citizens, continued to decline.

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
England	398.3	420.0	445.1	460.7	520.9	551.6	581.3	588.0	577.6
London	165.2	164.0	171.1	176.5	192.6	190.6	192.8	193.0	204.1
London as % England	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 11.3 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.

Short-Term Migration

On 24th February ONS also 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
All Reasons	295	335	374	291	281	237
Employment	59	90	108	76	67	38
Study	78	70	82	76	65	67
Other	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 generally risen and outflows declined. The flows are changing and trends in London are not necessarily reflecting the national situation. In the first half of 2010 more people have continued to leave London to go to the rest of UK, though at low levels compared to pre-recession years. At the same time, the net international flow to the UK has increased due 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 well 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 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 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 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. However, any reflection of the UK's poor economic performance at the end 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.