

Migration Indicators

Intelligence Update 15-2011

Background

On 25th August the Office for National Statistics (ONS), in combination with the Home Office and the Department for Work and Pensions (DWP), published their 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 fourth quarter (ie year end) 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 for the year to end December 2010 following a recent low base for year to end June 2009. This is an increase of 10 thousand since June 2009 but still well below pre-recession values.

Following increases in the outflow of people from London since year to end June 2009, the figures for year to end December 2010 show a slight drop to 221 thousand, although it is not yet clear whether this is the beginning of a new trend. The gross inflows were again slightly reduced at 176 thousand (year to end December 2010), 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 2010 quarter 3 and 4. ONS/PRDS

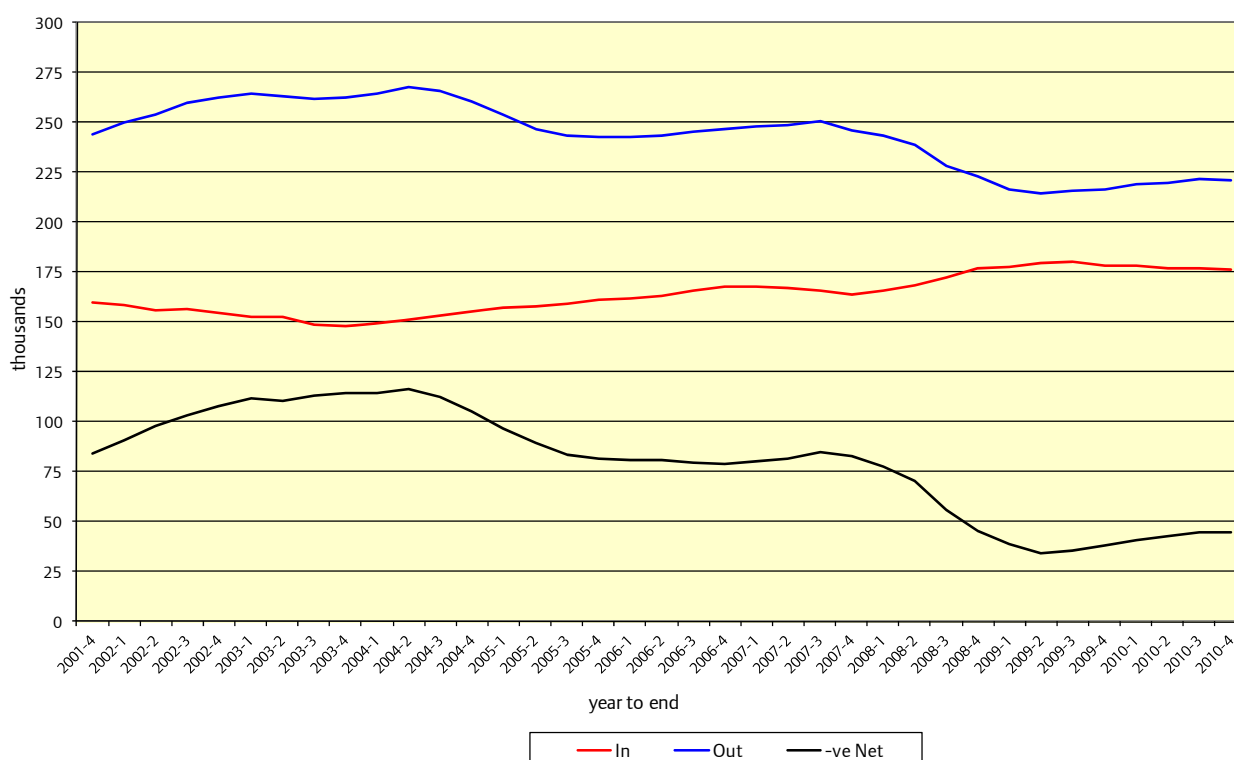
	London			UK	London flows as % of the UK	
	In	Out	Net		In	Out
2002 Q2	156.0	254.2	-98.2	1,268	12.3	20.0
2003 Q2	152.5	262.9	-110.4	1,263	12.1	20.8
2004 Q2	151.6	267.8	-116.2	1,270	11.9	21.1
2005 Q2	157.6	246.9	-89.3	1,213	13.0	20.4
2006 Q2	163.1	243.7	-80.6	1,212	13.5	20.1
2007 Q2	167.0	248.4	-81.4	1,227	13.6	20.2
2008 Q2	168.2	238.8	-70.6	1,190	14.1	20.1
2009 Q2	179.9	214.4	-34.5	1,152	15.6	18.6
2010 Q2	177.2	219.8	-42.6	1,160	15.3	18.9
2010 Q3	177.0	221.5	-44.5	1,163	15.2	19.0
2010 Q4	176.3	220.9	-44.6	1,159	15.2	19.1

Source: NHSCR moves within the UK and Isle of Man year ending December 2010, ONS

Figures for the UK show that inter-regional moves as a whole have started to rise (year to end June and September 2010) but are still some 100 thousand below pre-recession figures.

London inflows as a percentage of UK inflows have continued to increase since year to end June 2002 from 12 per cent to 16 per cent for year to end June 2009. There has been a slight decrease for year to end December 2010. The opposite has taken place with regards to London outflows as a percentage of UK inflows although this has been less pronounced.

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 30th 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
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 ending December 2010 and show a decrease in inflow since end-2008 coupled with a significantly declining outflow. This has led to an increase in the annual net inflow since June 2008.

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 per cent 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 about 47 per cent in 2002. Provisional data for regions for 2010 are expected to be released on 25th November 2011.

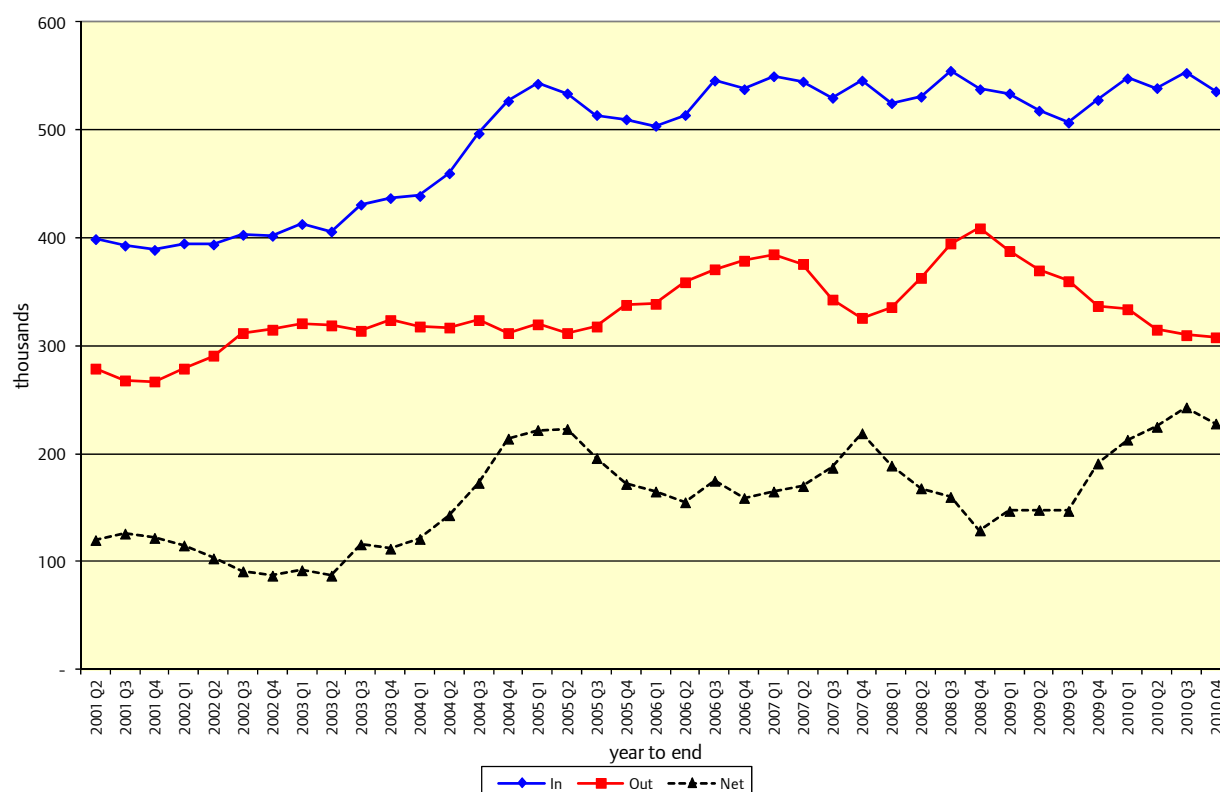
Table 3: Long-term International Migration to and from London and the UK, thousands, 12-month periods ending at quarter 4. ONS.

	UK			London			London flows as % of the UK		
	In	Out	Net	In	Out	Net	In	Out	Net
2002 Q4	516	363	153	181	108	73	35.1	29.8	47.7
2003 Q4	511	363	148	174	103	71	34.1	28.4	48.0
2004 Q4	589	344	245	186	88	98	31.6	25.6	40.0
2005 Q4	567	361	206	175	95	80	30.9	26.3	38.8
2006 Q4	596	398	198	172	117	55	28.9	29.4	27.8
2007 Q4	574	341	233	161	92	69	28.0	27.0	29.6
2008 Q4	590	427	163	163	113	50	27.6	26.5	30.7
2009 Q4	567	371	196	154	123	31	27.2	33.2	15.8
2010 Q4	536	308	228						

Source: IPS estimates of long-term migration, rolling annual data to quarter 4 2010, ONS

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 December 2010, 536 thousand persons arrived in the UK and 308 thousand persons left. The net inflow therefore increased to 228 thousand. The rising trend of net immigration to the UK over the last eight 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 124 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 184 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.

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 end 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. However, the gross inflow fell slightly to 71 thousand for the year to end December 2010.

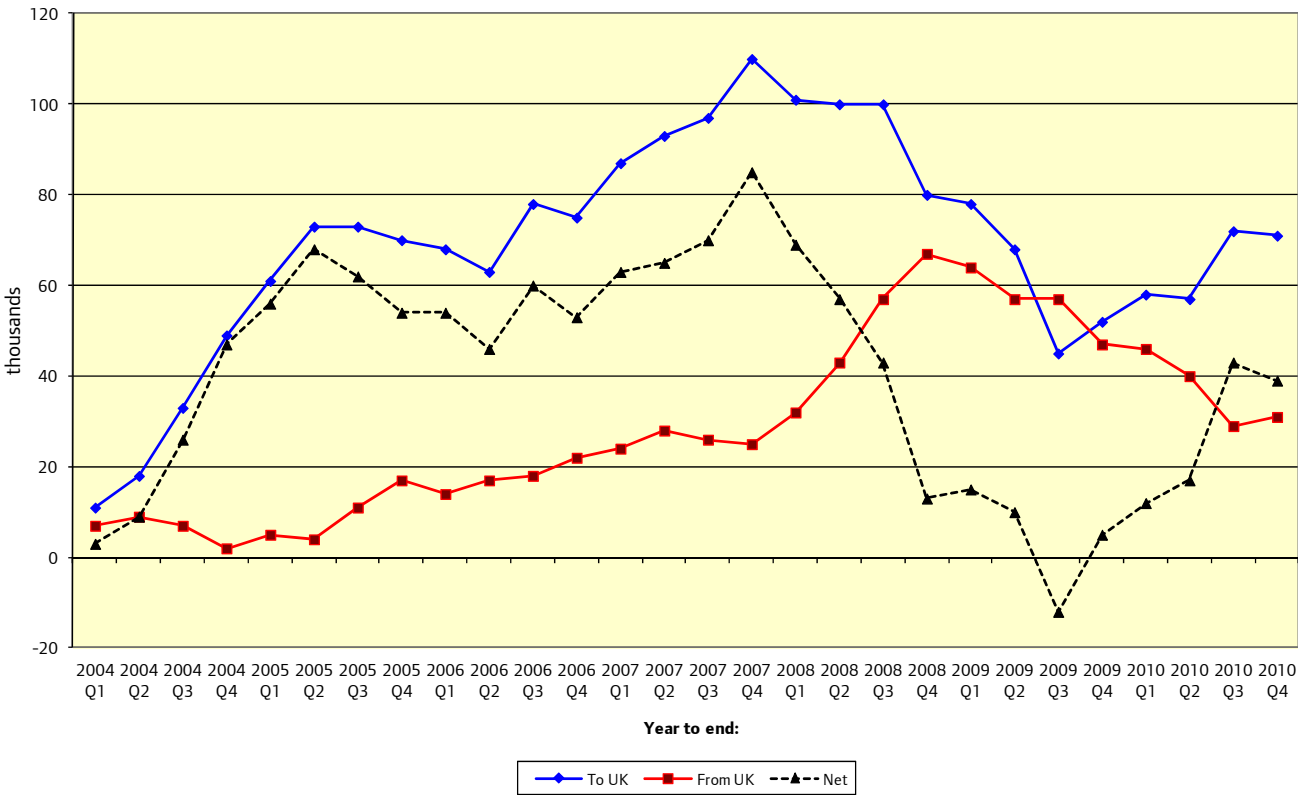
The number of return migrants continued to decline to 29 thousand for the year to September 2010, having peaked at 58 thousand for the year to end June 2009. This figure rose slightly to 31 thousand for the year to December 2010. The net flow into the UK for the year to end September 2010 (43 thousand) was some four times greater than for the year to end June 2009 (10 thousand), although there was a slight decline in this flow to 39 thousand for the year to December 2010.

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	2010 Q4
To UK	18	73	63	93	100	68	57	72	71
From UK	9	4	17	28	43	58	40	29	31
Net	9	68	46	65	57	10	17	43	39

Source: IPS estimates of long-term migration, rolling annual data to quarter 4 2010, ONS

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 from 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.

	Total		EU A8		Bulgaria & Romania	
	UK	London	UK	London	UK	London
2003 Q1	346.2	149.6	11.4	5.8	5.8	3.8
2004 Q1	373.5	157.4	19.9	8.4	8.4	5.2
2005 Q1	435.4	169.7	107.8	33.2	7.8	4.2
2006 Q1	663.1	235.4	269.3	61.0	5.7	1.7
2007 Q1	705.8	240.9	309.0	64.6	6.8	3.4
2008 Q1	733.1	272.7	293.8	63.4	36.9	23.4
2009 Q1	686.1	275.6	215.2	52.8	39.9	20.7
2010 Q1	572.7	249.2	151.3	38.0	30.2	11.8
2010 Q4	667.5	281.9	176.8	41.0	31.4	5.0
2011 Q1	704.9	301.1	224.8		35.9	

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

The total number of new NINOs issued in the year to end March 2011 increased by 132 thousand to 705 thousand from 573 thousand in the year to end March 2010. This follows a drop of 113 thousand the previous year. In London, total NINo registrations rose from 249 thousand in the year to end March 2010 to 301 thousand in the year to end March 2011.

Data for NINo registrations for the UK for those from EU A8 countries also shows a significant increase between the year to end March 2010 and 2011 following a drop between the year to end March 2008 and 2010.

Although the total number of NINo registrations for the UK for those from Bulgaria and Romania rose from 30 thousand for year to end March 2010 to 36 thousand for year to end March 2011, the percentage of those registered in London has nearly halved from 23 per cent for year to end March 2008 to only 12 per cent for year to end March 2010.

Data by local authority is only available up to the year end December 2010.

'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 residing outside the UK for at least three 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	2009-10
England	398.3	420.0	445.1	460.7	520.9	551.6	581.3	588.0	577.6	604.4
London	165.2	164.0	171.1	176.5	192.6	190.6	192.8	193.0	204.1	237.7
London as % England	41.5	39.0	38.4	38.3	37.0	34.6	33.2	32.8	35.3	39.3

Source: 'Flag 4' GP registrations by local authority, mid-year to 2010, ONS

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 for 2009-10 were 26.8 thousand higher when compared to 2008-09 and just over a 50 per cent increase from 2000-01. This is a reversal of the year before when the number of new registrations in 2008-09 fell in comparison to those in 2007-08.

London's share of registrations also rose to 39.3 per cent for 2009-10 when compared to 35.3 per cent for 2008-09. With the exception of 2007-08 when London's share of registrations fell, there has been an upward trend since 2006-07. However, there has been just over a two per cent drop in London's share of registrations in 2009-10 when viewed against figures for 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 is for 2010-11 and is scheduled for 30th June 2012.

Short-Term Migration

On 24th February 2011 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. The next set of data, to cover the year to mid-2010 is not expected to be released until February 2012.

Since the year to end mid-2006 when the number of short-term migrants peaked at 374 thousand, there has been a steady decline to 237 thousand by year to end mid-2009. In this year those coming for employment fell to only 38 thousand, 70 thousand fewer than for the year to mid-2006. However, the numbers coming to study increased slightly to 67 thousand for year to end mid-2009 from the previous year but were still some 15 thousand less than during the peak (year to end mid-2006).

As with employment and study, the number of short-term migrants arriving in England and Wales for 'other' reasons also declined. The numbers show a fall of 17 thousand from the year to end mid-2008 when compared to the following year.

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. Both inflows and outflows to the UK have fallen when compared to previous years with a greater decrease in the number of people leaving the UK resulting in an overall net increase. Trends in London are not necessarily reflecting the national situation with inflows falling but outflows rising leading to a fall in the net increase. Net flows into London as a percentage of the UK have dropped dramatically.

The net inflow of A8 citizens has also risen slightly during 2010 but is still below the peak of a few years previously.

With regard to internal migration, there has been a slight increase in the numbers leaving London and a fall in the numbers moving into London although London outflows as a percentage of the UK have remained largely stable since 2002.

There has been a continued rise in the number of NINo registrations in the UK particularly by A8 citizens and those from Bulgaria and Romania. Figures for London however suggest an overall increase in NINo registrations which is not reflected in registrations by those from A8 countries and Bulgaria and Romania. Registrations by Bulgarian and Romanian citizens is showing a large drop from nearly 21 thousand registrations for financial year 2009 compared to only 5 thousand the following year.

'Flag 4' registration data shows an increase in numbers for both England and London with London numbers as a percentage of England's nearly being back to 2000-01 levels.

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.

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