

Update 01-2014

Migration Indicators: November 2013

January 2014

Background

The Office for National Statistics (ONS) release 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.

All data in this *Update* are annual and in all instances the latest month to which a dataset refers is given, 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.

The most recent release of data from the ONS was on 28 November 2013 which consisted of final migration data for calendar year 2012. The next scheduled release of data is 27 February 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
- 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 2012 (released June 2013).

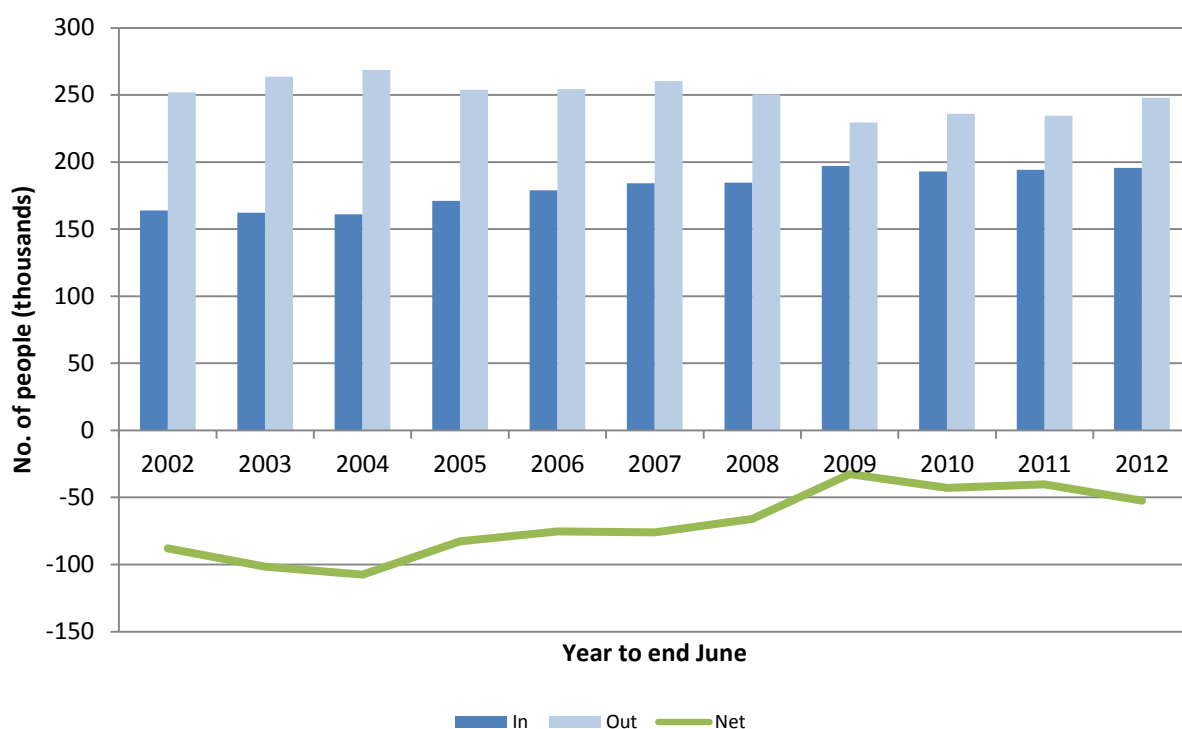
Next update: Year ending June 2013 (released June 2014).

The most recent release of data was for the year ending June 2012. Figure 1 shows that inflows to London from England & Wales in 2012 remained stable for the fourth consecutive year at some 195 thousand people.

Outflows from London rose slightly in 2012 to nearly 250 thousand people, just lower than the 2008 figure and the highest number of outflows since 2009. Outflows still remain below the 2004 high of nearly 270 thousand people.

Net flow remains negative with more people leaving London than arriving and the larger rise in outflows compared to inflows 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 the UK year ending June 2012, ONS/PRDS

International migration

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

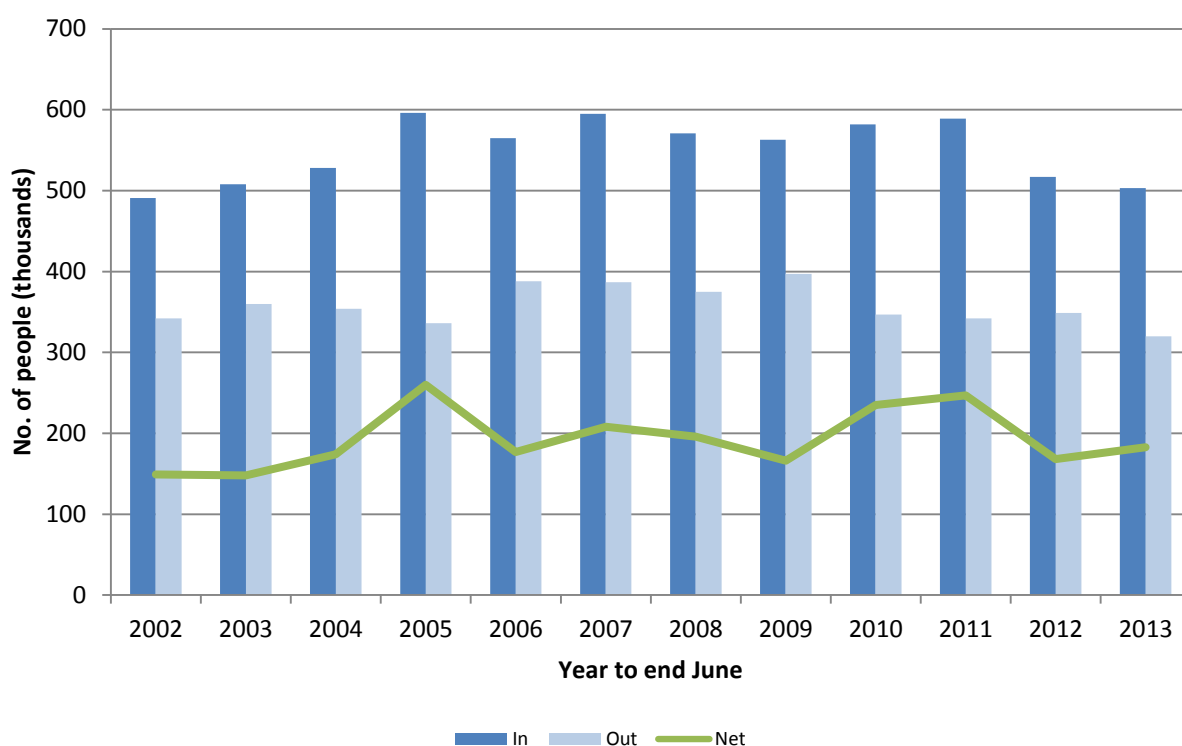
Next update: Year ending September 2013 (released February 2014).

Long-Term International Migration (LTIM)

As part of the most recent release, ONS issued provisional LTIM data for both the year ending March 2012 and year ending June 2013. Final LTIM data for calendar year 2012 was also released.

Figure 2 shows that inflows into the UK fell to their lowest level since 2002 from a recent high in 2011 of 589 thousand to reach just over 500 thousand people. This was a drop of 86 thousand when compared to the same time period in 2011. Outflows also fell to 320 thousand people; down by nearly 30 thousand from the previous year. Net UK migration however rose to reach 183 thousand people, up 15 thousand from the previous year.

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



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

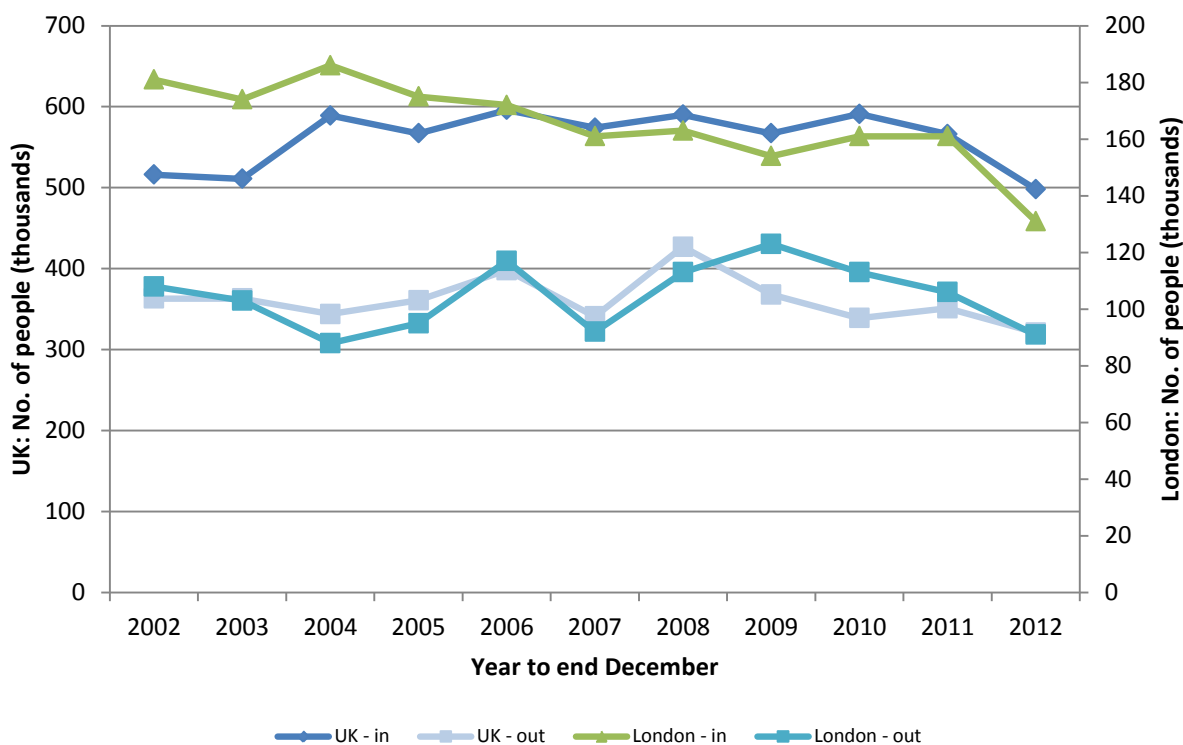
Figure 3 compares UK and London inflows and outflows. Both UK and London inflows dropped considerably in 2012 when compared to 2011. In 2011 London inflows were just above 160 thousand. These dropped by 30 thousand to 131 thousand in 2012 reaching their lowest level over the period since 2002. UK inflows fell by 68 thousand over the same period to nearly 300 thousand; their lowest level over the period since 2002.

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.

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.

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



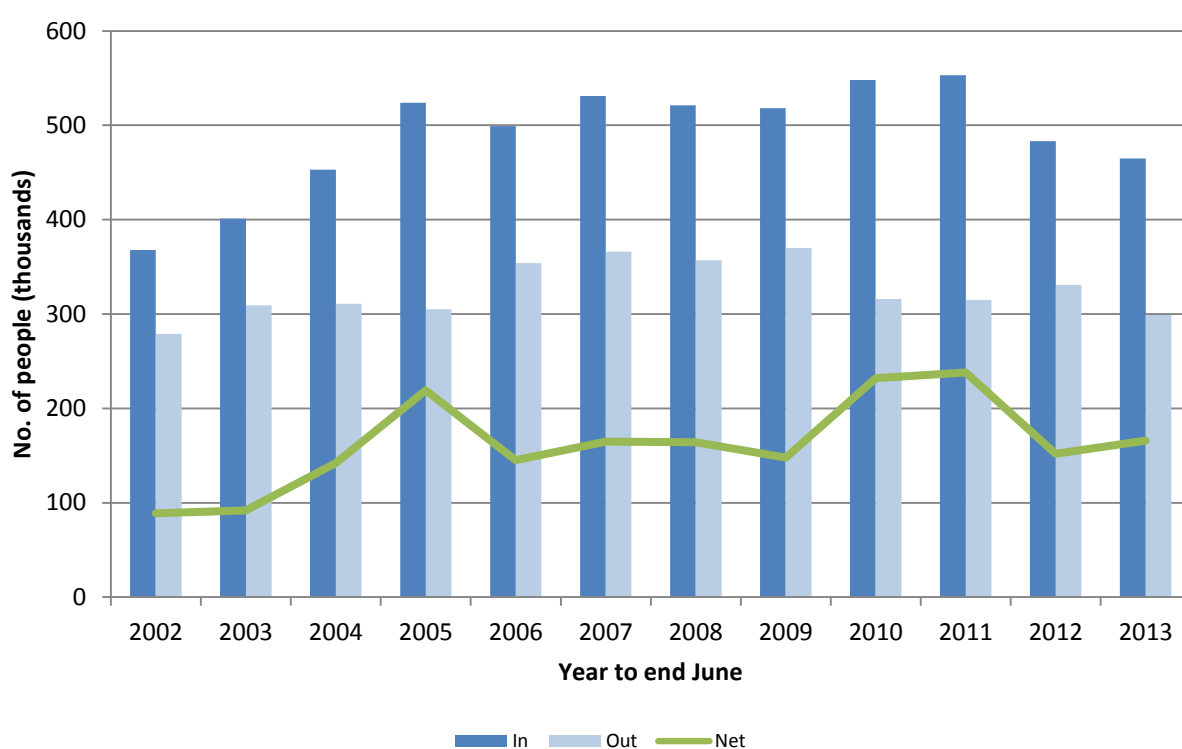
Source: Long Term International Migration (LTIM) estimates years ending December 2012, ONS

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 fallen by nearly 20 thousand people from the previous year to 465 thousand in 2013 (Figure 4). Outflows have seen a larger drop of some 32 thousand people to reach their lowest level since 2002. Net flow remains positive and has risen by 14 thousand people but is still considerably lower than the high of 238 thousand people in 2011.

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

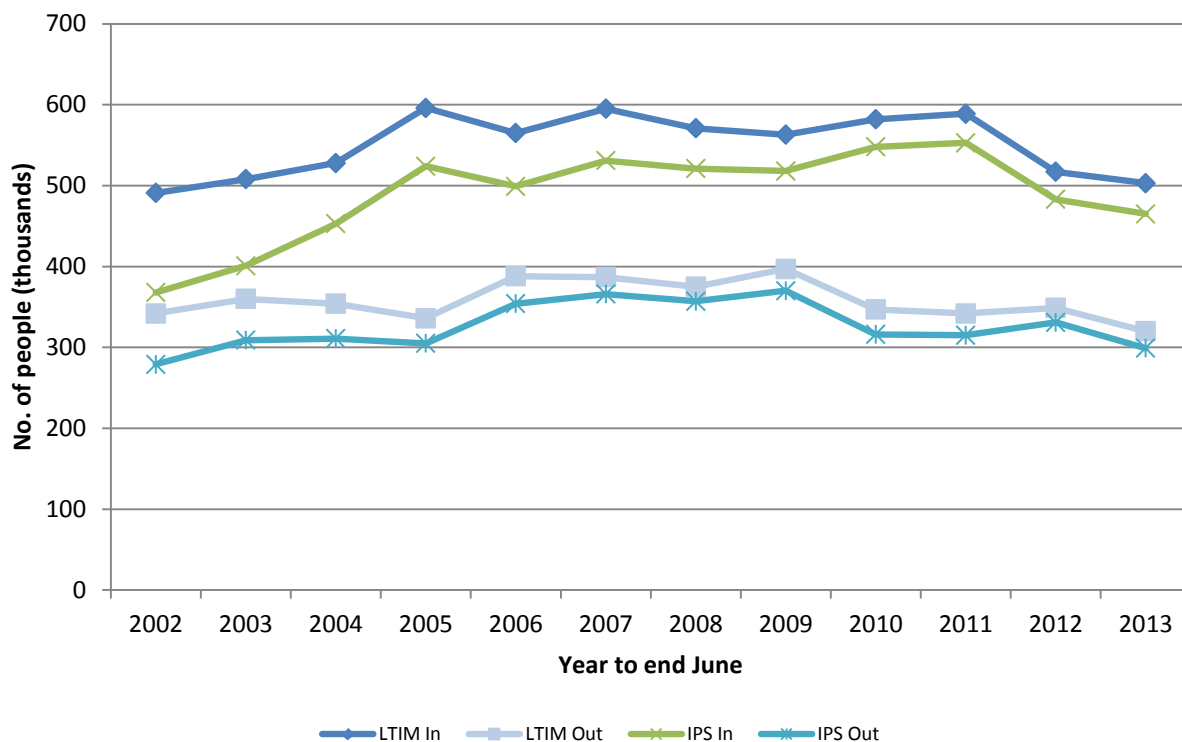


Source: International Passenger Survey (IPS) estimates year ending June 2013, ONS

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 the overall difference being the greatest in 2010.

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



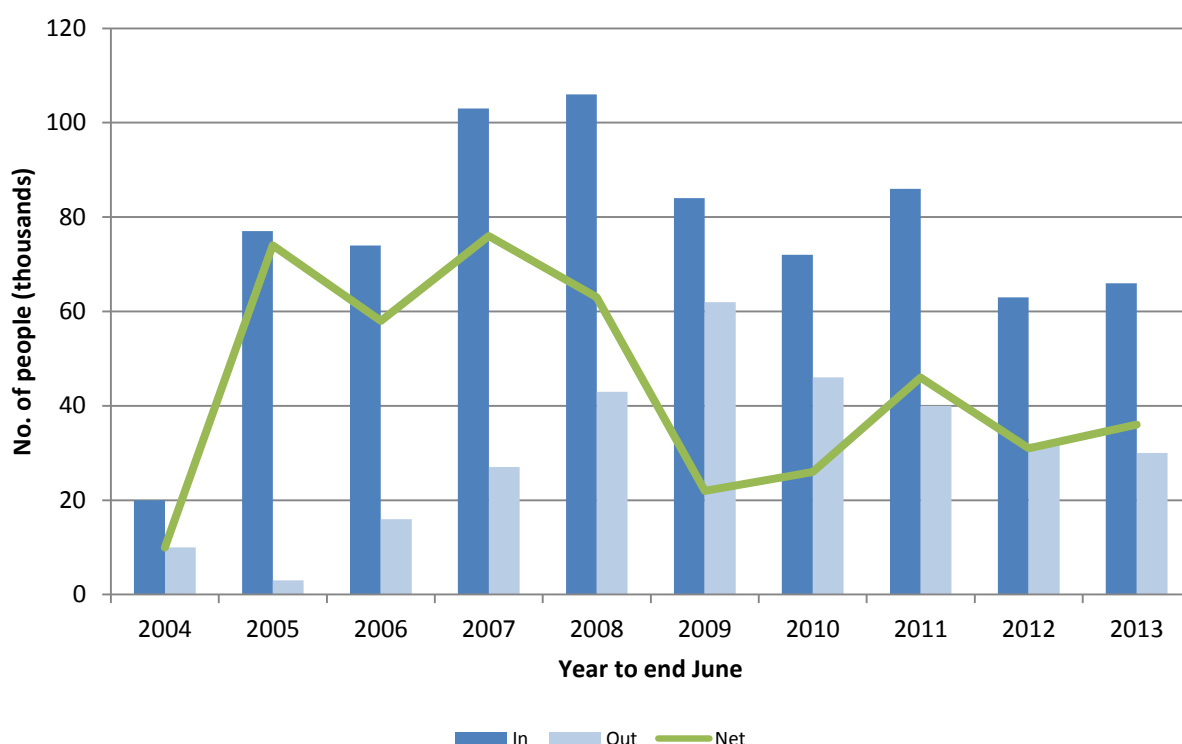
Sources: Long Term International Migration (LTIM) and International Passenger Survey (IPS) estimates year ending June 2013, ONS

EU8 citizens

Figure 6 shows that the number of EU8¹ citizens migrating into the UK rose slightly in 2013 to 66 thousand from 63 thousand the previous year. The number of in-migrants still remains considerably below the high of 106 thousand seen in 2008. Outflows continued to fall for the fourth consecutive year reaching 30 thousand; a slight drop of two thousand compared to the previous year.

Despite the continued fall in outflows, the rise in inflows meant that net migration rose to 36 thousand. This is some 40 thousand lower than the peak net flow of 76 thousand seen in 2007.

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



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

In 2008 nearly 58 per cent of migrants to the UK from the EU were from EU8 countries. By 2013 this had dropped to 36 per cent; still some 13 per cent higher than in 2004.

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

National Insurance Number (NINo) allocations

Most recent update: *Year ending March 2013 (released August 2013).*

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

All NINo data is for the 12 months ending March of the year given. The total number of NINo registrations in the UK fell in 2013 by some 39 thousand to 562.1 thousand compared with the previous year. Although this is one of the lowest numbers of NINo allocations in recent years, it is significantly higher than in the early 2000s; in 2003 for example there were only 346.2 thousand registrations.

Registrations in London in 2013 also fell compared with 2012 by 24 thousand to nearly 226 thousand. This is the lowest number of London NINo registrations since the early 2000s.

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 7 and 8 show the trends for EU8 and EU2² nationals. NINo registrations to EU8 nationals peaked in 2007 with 309 thousand registrations in the UK of which 64.6 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 178.8 thousand NINo registrations to EU8 nationals in the UK of which 41.7 thousand (23.3 per cent) were in London. This shows a slight increase in the number of registrations compared to the previous year.

Registrations of EU2 nationals increased in 2008 the year following accession of these countries to the EU. In London the number of NINo registrations to EU2 nationals also peaked in the same year at 23.4 thousand registrations accounting for 63.4 per cent of UK registrations. The number of registrations in London has since fallen to 12.3 thousand (2013) and those in the UK to 28.2 thousand. However London's proportion of registrations has remained relatively stable for the past three years at some 44 per cent of UK registrations.

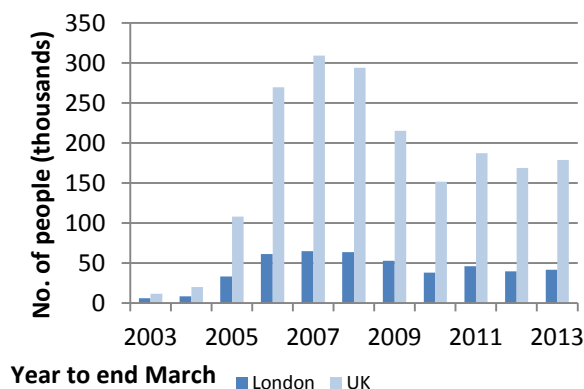
Figure 9 shows that the most registrations to nationals from overseas in 2013 were to those from EU accession countries³ accounting for 209.2 thousand registrations in the UK. This is however a considerable drop from a peak of 332.4 thousand registrations in 2008. Registrations to EU (excluding EU accession countries) nationals saw the biggest increase when compared to last year; a rise of over 32 thousand to reach 176.1 thousand and the highest number of registrations to this group over the period from 2003.

NINo registrations to Asian and Middle Eastern nationals continued to fall to reach 95.1 thousand, nearly 55 thousand lower than in 2012. This is the lowest number of registrations for this group over the period from 2003.

² The EU2 consists of Bulgaria and Romania.

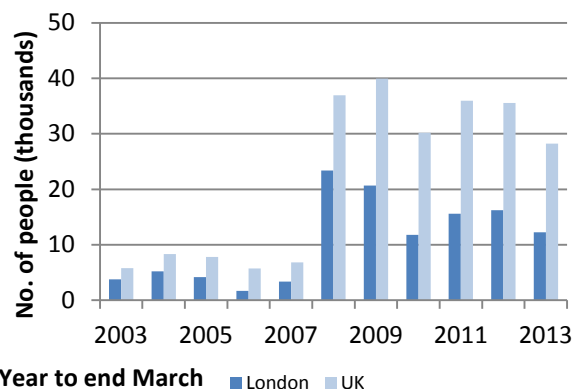
³ In this instance EU Accession countries refers to the EU8, the EU2, Malta and Cyprus.

Figure 7: National Insurance Number allocations to EU8 nationals, London and UK, 12-month periods ending March of year given, thousands



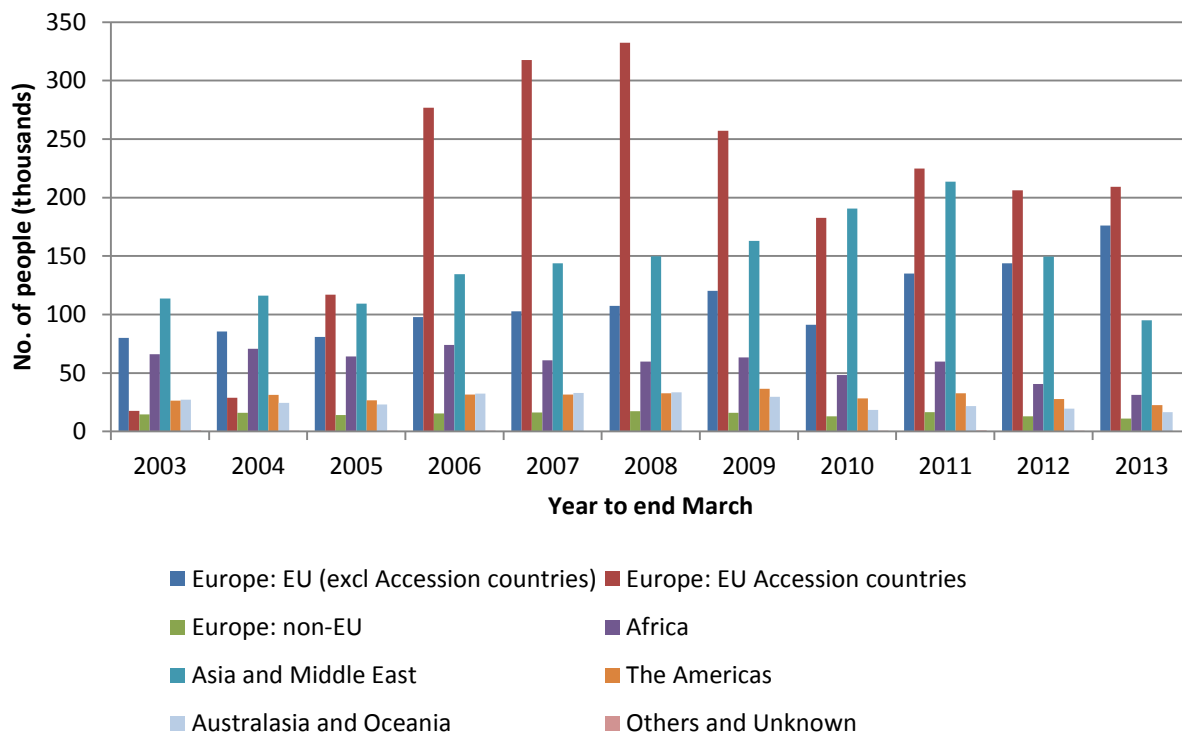
Source: NINo registrations to adult overseas nationals entering the UK year ending March 2013, DWP

Figure 8: National Insurance Number allocations to EU2 nationals, London and UK, 12-month periods ending March of year given, thousands



Source: NINo registrations to adult overseas nationals entering the UK year ending March 2013, DWP

Figure 9: 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 year ending March 2013, DWP

'Flag 4' GP registrations

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

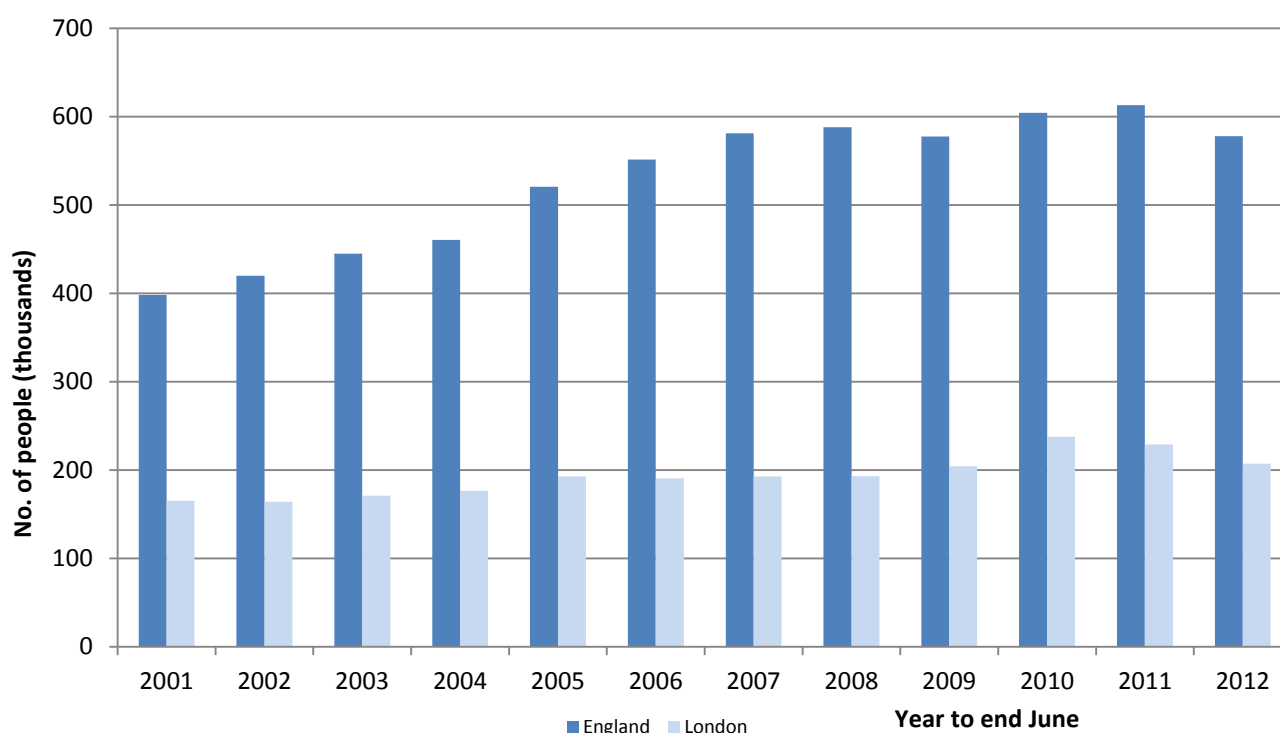
Next update: Year ending June 2013 (released August 2014).

'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 10 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 10: 'Flag 4' registrations, London and England, 12-month periods ending June of year given, thousands



Source: 'Flag 4' GP registrations year ending June 2012, ONS/PRDS

Short-term international migration

Most recent update: Year ending June 2011 (released May 2013).

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

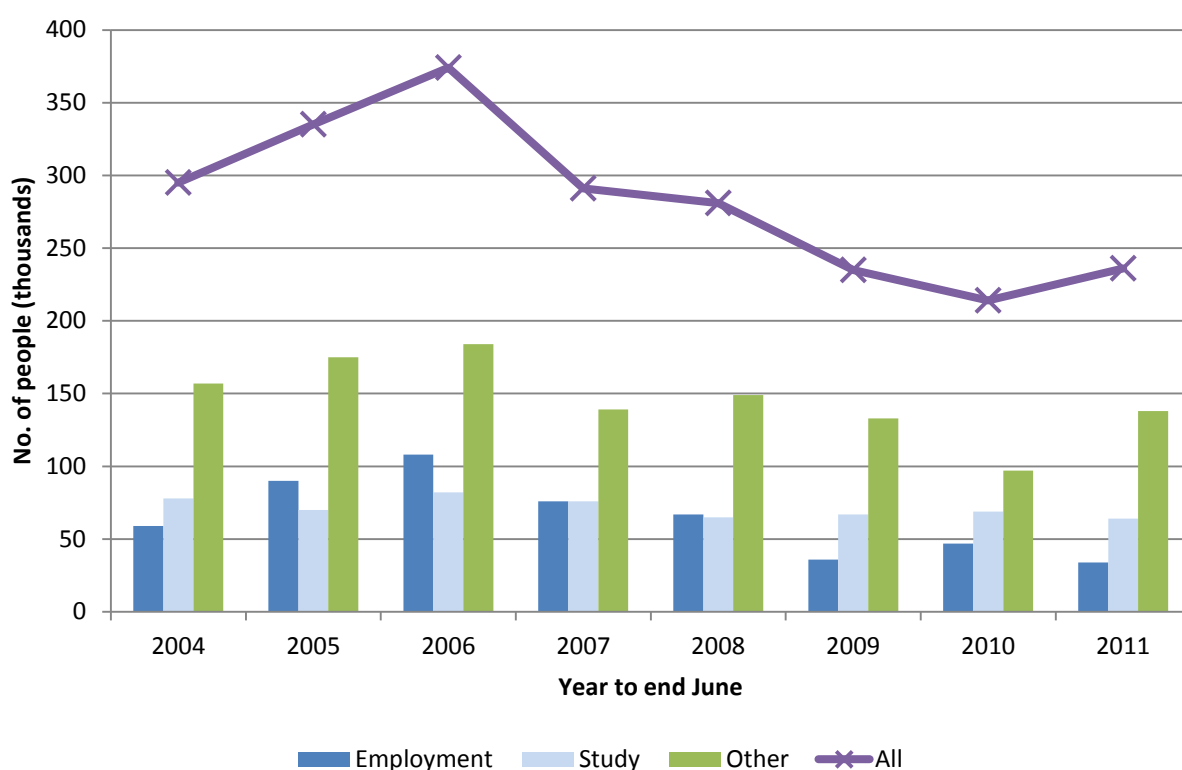
Short-term international migration (stays of less than 12 months) data is released annually for England & Wales for the period ending June of each year. The number migrating for employment rose year-on-year between 2004 and 2006 (Figure 11). It then fell for three consecutive years to 36 thousand before rising temporarily. The latest figures released for 2011 show that the number who migrated for employment purposes fell again to a low of 34 thousand.

The number migrating for study has also fallen but by less and has generally fluctuated around 70 thousand since 2004. It peaked at 82 thousand in 2006 and fell to a low of 64 thousand in 2011.

Short-term international migration largely consists of those migrating for reasons other than employment or study. For example, for 2011, 58.5 per cent 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, 236 thousand people migrated to England & Wales for between 3 and 12 months in 2011. This is up from 214 thousand people for the year before but is still considerably below the peak of 374 thousand in 2006.

Figure 11: 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 year ending June 2011, 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.

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 are the latest two countries to have joined the EU in 2007. They were formerly known as the A2 (Accession 2).

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 is the current grouping and includes all current 27 member states (including the UK). It is made up of the EU25 plus Bulgaria and Romania which joined the EU in 2007.

EU (European Union)

The EU in this sense comprises the EU15 up to 2003, the EU25 from 2004 to 2006, and the EU27 from 2007 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. Croatia joined the EU in July 2013 to take the total to 28 countries. However figures that include Croatia will not be available until late 2014.

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.