



East of England
Local Government Association

Migration patterns and Dynamics across the Wider South East

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Aims of the Project for EELGA

- To meet needs of authorities across the Wider South East – to understand the *dynamics of migration* affecting the region
 - Particularly in relation to *the future growth of the capital*
 - both in employment and population terms
 - Enabling possible collaboration on strategic issues of common concern, during the London Plan review
 - expected to deal more explicitly than previous Plans with interactions across the London border
 - Via a review of existing/ongoing research + readily available data sources
 - This is very much work in progress
 - Presentation is a sharing of provisional views/data
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Simplifying a Complex Picture

- The role of migration flows in this part of the UK is complex – because of its scale, dynamism and connectedness
 - Many overlapping housing and labour sub-market areas across the WSE (and its external ‘fringe’)
 - interact via a mass of residence and/or workplace moves
 - Where opportunities are constrained, in-moves lead to displacement effects , & longer-distance population shifts
 - But basics involve 3 main migrational currents:
 - net international migration – spatially concentrated and with strong external influences
 - a continuing drift of labour migrants from peripheral UK regions with weaker labour demand (offset by retirement moves)
 - Population deconcentration across/beyond WSE driven by rising demands for space + displacement effects from migration into the centre
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Relating these Currents to Movement into/across a set of Rings around the Core of the Region

➤ The Rings:

1. Greater London (8.3mn);
2. Outer Metropolitan area (6.6mn);
3. Outer WSE (8.0mn);
4. Fringe/Rest of the South (8.8mn);
5. Periphery/Rest of UK (33.1mn)

➤ The Currents:

- **International** – all net movement into the WSE (rings 1-3) – *labour market*
 - **North-South** – all net movement into the WSE (rings 1-3) – *labour market*
 - **Deconcentration** – all net outward movement within rings 1-4 – i.e. 1 into 2; 1 and 2 into 3; and 1, 2 and 3 into 4 – *housing market*
 - With first and last as strongest elements – but volatility in all 3
 - **and** important links from concentrated immigration to domestic deconcentration
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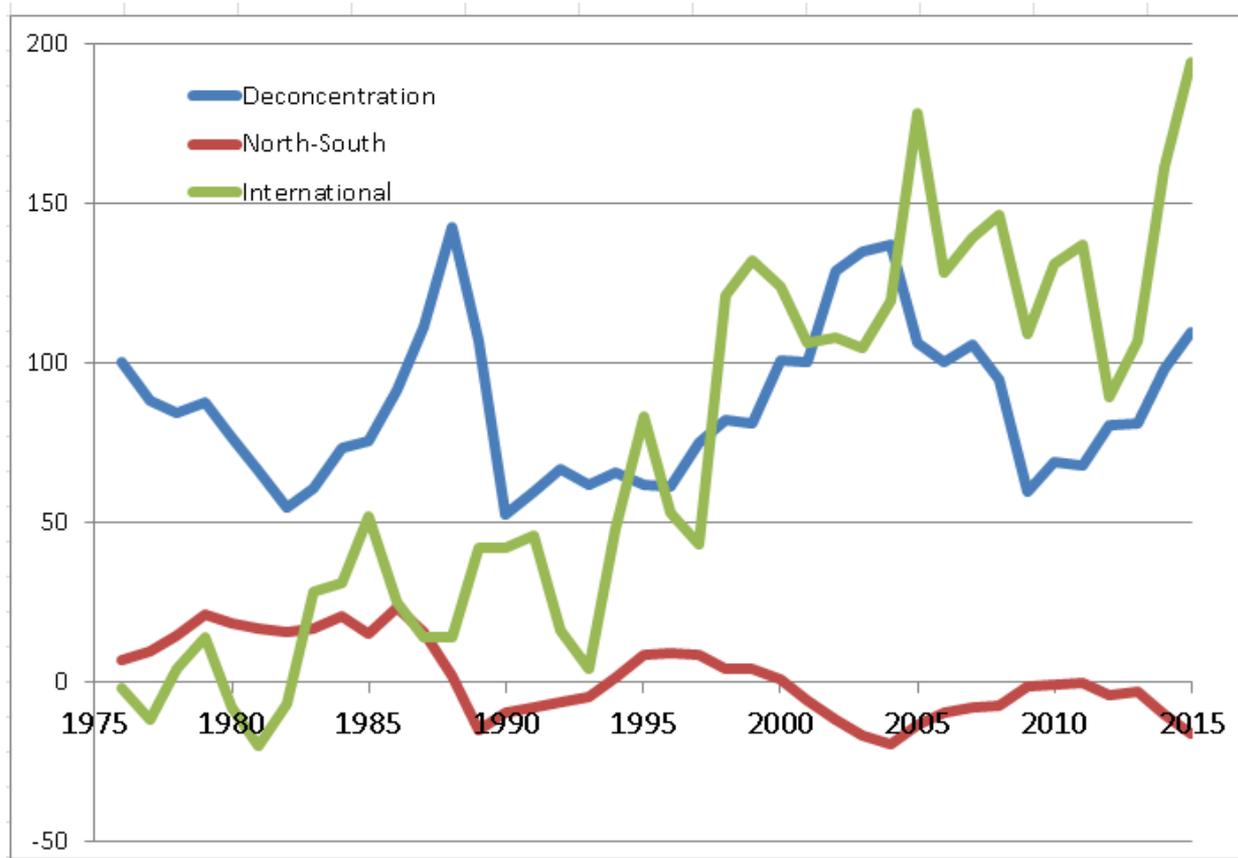
Migration flows (in 000s) between the “Rings” 2001-2015 (Annual Average)

FROM \ TO	London	Outer Met. Area	Rest of WSE	Fringe Outside WSE	Periphery (Rest of UK)
London	-	101	63	26	71
Outer Met. Area	52	-	80	24	55
Rest of WSE	45	55	-	43	77
Fringe Outside WSE	23	17	37	-	103
Periphery (Rest of UK)	72	43	70	107	-
Net Domestic migration	-69	+5	+30	+20	+14
International	94	16	22	22	82

Source: ONS Mid Year Estimates

How these Currents have Fluctuated over the Past 40 years

all in net terms (in 000s)



The Significance of these Currents

- Three quite distinct elements reflected in migrational fluctuations across the WSE – past, recent and future?
 - **International:** biggest element of change over past 30 years –
 - partic. affected by refugee crises and two EU enlargements
 - **North-South:** more limited but variable impact,
 - fluctuating in response to macro-cycles and relative performance of WSE employment – with a downward trend
 - **Deconcentration:** largest scale and no evident trend
 - but great fluctuations – affecting London and Outer WSE + external Fringe (hardly OMA though)
 - Reflecting macro- demand cycles plus strong displacement effects of international inflows (to London particularly)
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And How These Might be Explained / Modelled

- **International Migration:** globalising culture/communications; conflicts and refugee crises; UK immigration policies and EU enlargement – with no clear relation to London/WSE economic fluctuations
 - **North-South Flows (for working age movers):** the shifting gap between GSE and RUK unemployment rates ?
 - **Population Deconcentration (plus older movers to the periphery):** strength of effective demand for more residential space; and displacement effects from volume of recent international arrivals (particularly into London)
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How these Seem to Have Impacted on Recent London Migration Trends

- Strong (Central) London employment boom over the past decade seems to have had some positive impact on **N-S inflow** to WSE, if not especially London
 - Displacement effects (after c. 2 yrs) from continued/revived international inflows will have at least sustained the deconcentrating outflow from London
 - Despite generally weak real income growth, reviving demand for residential space would also be expected to have produced a substantial revival in these **deconcentrating outflows** – but with quite a way to go.
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Some Key Uncertainties about How These will Develop

- Impacts of Brexit on International inflows
 - and thus on scale of displacement from the core
- The speed with which housing expectations among (past waves of) poor country migrants (esp. in London) will lead to increased displacement (and more household formation)
- Impacts of Brexit on the strength of the WSE economy, absolutely and relative to the rest of the UK
 - compounded by uncertainty about why London employment trends have been so strong over the past decade
 - and significance of political ambitions to rebalance UK economy
- Whether/where policy can reduce constraints on housing supply in WSE