

Understanding Migration from London to the Wider South East

Introduction

The London Plan, published in March 2021, sets a housing delivery target of 52,000 homes per year over ten years. This falls some way short of the need for 66,000 identified in the Plan's SHMA, and even further relative to the 90,000 calculated from the government's standard method. Long-term average delivery stands at just 35,000. A significant delivery shortfall is therefore likely to persist, requiring collaboration with authorities across the Wider South East (WSE) to address unmet need.

An expert panel report, investigating aspects of the London Plan which could be inhibiting housing delivery, was published in February. Its primary recommendation is an overarching presumption in favour of development on brownfield land, and a consultation on this and other changes is now ongoing. Given the significant scale

of under-delivery, however, pressure on authorities in the Wider South East will continue. This analysis considers where that pressure is likely to fall.





About this analysis

The Mid-Year Population Estimates (MYPEs) published by the ONS provide population estimates from national level down to electoral wards, including migration, mortality, and fertility for the year ending June 2022.

Stantec's [Development Economics](#) Team has analysed migration data from the MYPEs to determine how many people moved out of Greater London to the WSE (East or South East of England), breaking this down by age group and destination local authority. This will indicate where those moving out of London are likely to provide the greatest pressure for housing outside the capital.

In order to provide an indication of how trends have changed over time, we will compare outcomes with the year ending June 2020. Analysis for the year ending 2021 is not included – in the context of the pandemic, there was a spike in out-migration from London, which is likely to be a one-off and not a helpful guide to the future.

Results of the analysis are set out on the following pages:

- Key points
- All ages
- Families with young children (under 10s)
- Families with older children (10-17)
- Students and renters (18-24)
- First time buyers (25-44, the age group representative of first-time buyers and concealed households)
- Homeowners with equity (45-64, predominantly second-time buyers)
- Retirees (65+)





Key points

The number of people moving out of London and into the Wider South East increased from approximately 200,000 in the year to June 2020 to 247,000 in 2022.

Just over half as many people migrated from the Wider South East into London, so the net outflow was just over 110,000.

405,000 residents in total migrated out of London to other parts of the UK. Those heading to the Wider South East therefore made up 61% of the total.

By age group, the largest outflow by far – over 110,000 people – was among 25–44-year-olds. These are the group most likely to be prospective first-time buyers, indicating the difficulty they face getting on the housing ladder within London.

For all age groups except 18–24-year-olds (students and renters), outflows

from London exceed inflows, so there is net migration into the Wider South East.

For most groups, the biggest impacts are in local authorities immediately next to London, suggesting that people are trying to access more affordable or suitable housing whilst staying in reasonable commuting distance.

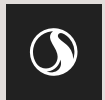
For students and renters, the biggest impacts are in university towns and cities, and relative to the existing populations of 18–24-year-olds some of these impacts are very large indeed (over 10%).

For the two oldest age groups (aged 45 and over), there are significant impacts in coastal authorities further from London.

Comparing the latest results to those from 2020:

- Outflows for all age groups have increased.
- Increased out-migration is reflected in districts immediately outside London for all age groups.
- Impacts further afield have also grown, especially for families with young children, first time buyers, and homeowners with equity. This reflects increasing unaffordability just outside the capital, perhaps supported by greater hybrid working.





All ages

In the year to June 2022, nearly 250,000 people moved out of London to the Wider South East. This compares to roughly 200,000 two years prior, which supports the view that housing affordability pressures have worsened.

The biggest relative impacts are generally in the immediate periphery of London, suggesting that many of those migrating out need to stay within close commuting distance. There are also increased impacts slightly further from London, e.g. in Essex and Bedfordshire.

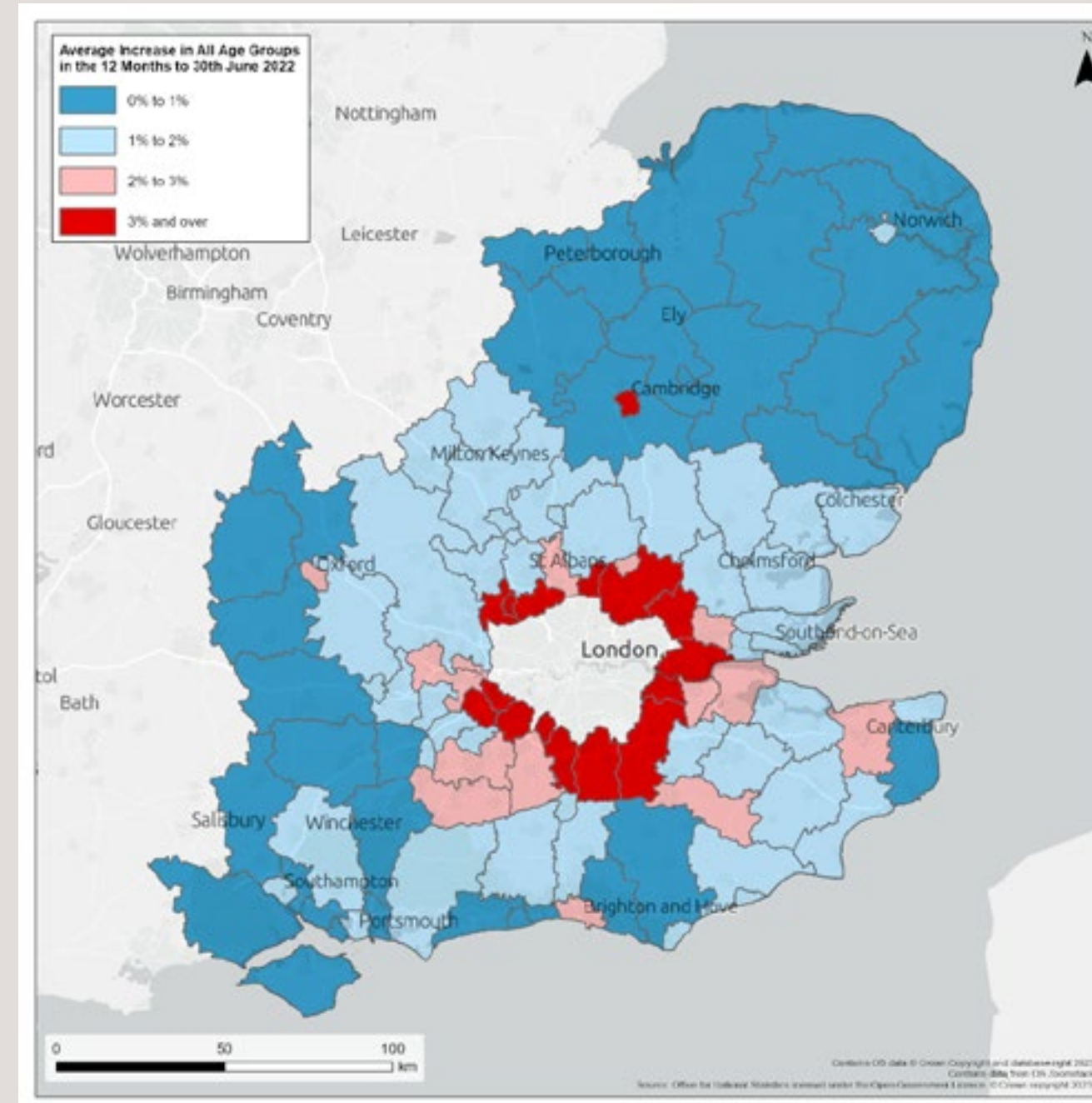
Relative to 2020, impacts have generally increased, especially in authorities bordering London.

Rank	Local Authority	Migrants from London
1	Buckinghamshire	10,791
2	Brighton and Hove	7,035
3	Thurrock	5,966
4	Medway	5,802
5	Dartford	5,703
6	Elmbridge	5,405
7	Epping Forest	5,169
8	Reigate and Banstead	4,861
9	Hertsmere	4,565
10	Cambridge	4,440
	Wider SE total	246,561

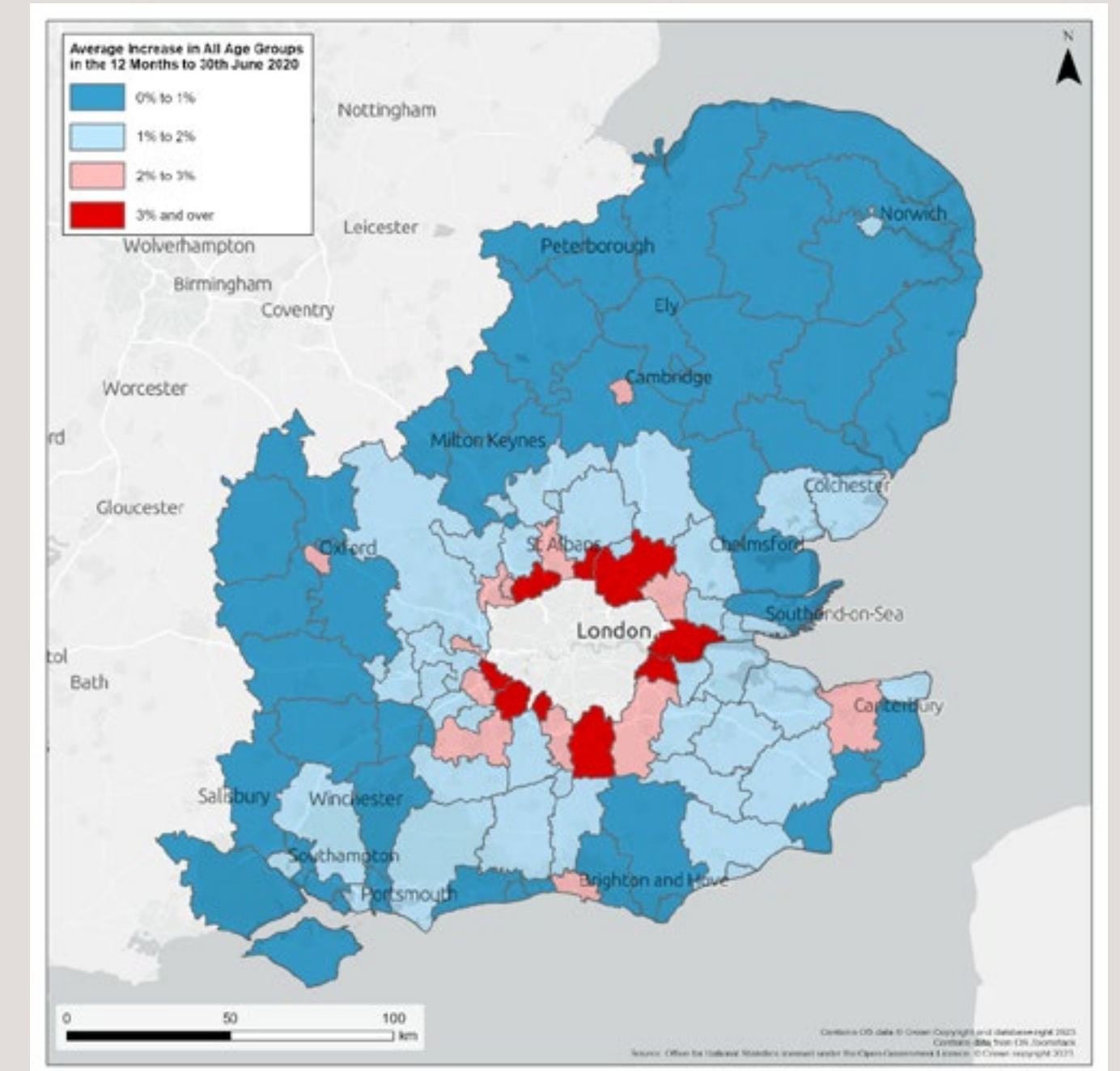
Table 1: people who migrated from Greater London in the year to June 2022

Rank	Local Authority	As % of resident total population in LA
1	Dartford	4.8%
2	Hertsmere	4.2%
3	Epsom and Ewell	4.2%
4	Tandridge	3.9%
5	Spelthorne	3.9%
6	Elmbridge	3.9%
7	Epping Forest	3.8%
8	Broxbourne	3.7%
9	Thurrock	3.4%
10	Watford	3.4%

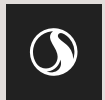
Table 2: % increase in the year to June 2022



Year ending 2022



Year ending 2020



Families with young children

For families with children under 10, moves are concentrated in authorities immediately outside London. This suggests that parents are trading off finding an affordable and suitable family home with maintaining a reasonable commute.

Outflows exceed inflows (7,624) by 4 to 1, so movement of young families from London is placing significant net pressure on housing in the Wider South East.

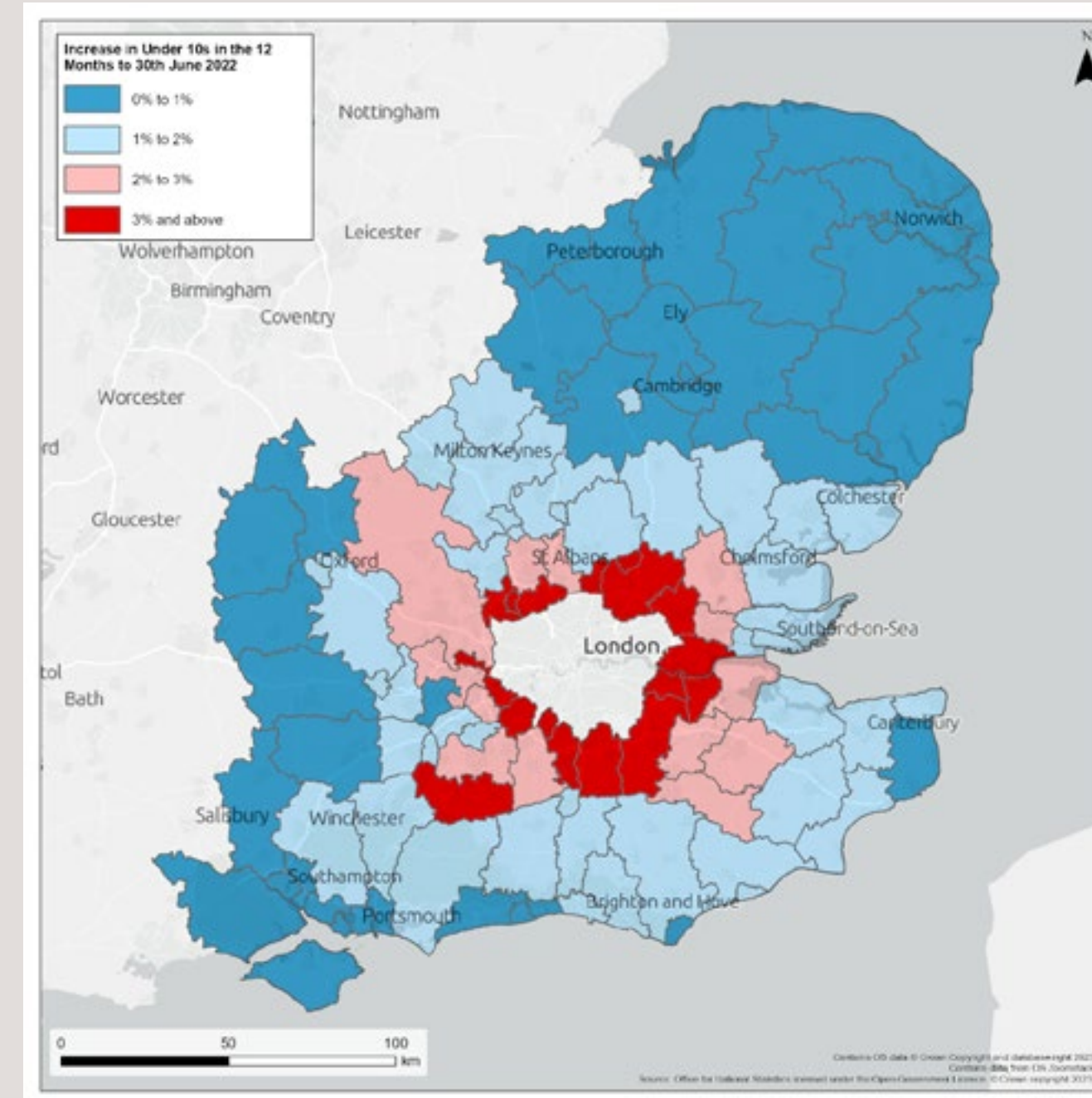
Relative to 2020, however, patterns of out-migration have spread further from London – for example Bedford and some authorities along the south coast which previously saw very small inflows now experience higher levels. This could reflect a combination of greater affordability pressures in and immediately around the capital forcing families to move further, and the growth of hybrid working enabling workers to move further whilst doing a longer, less frequent commute.

Rank	Local Authority	Migrants from London
1	Buckinghamshire	1,661
2	Thurrock	1,153
3	Dartford	953
4	Medway	951
5	Elmbridge	811
6	Slough	781
7	Basildon	700
8	Epping Forest	681
9	Reigate and Banstead	646
10	Luton	621
	Wider SE total	31,002

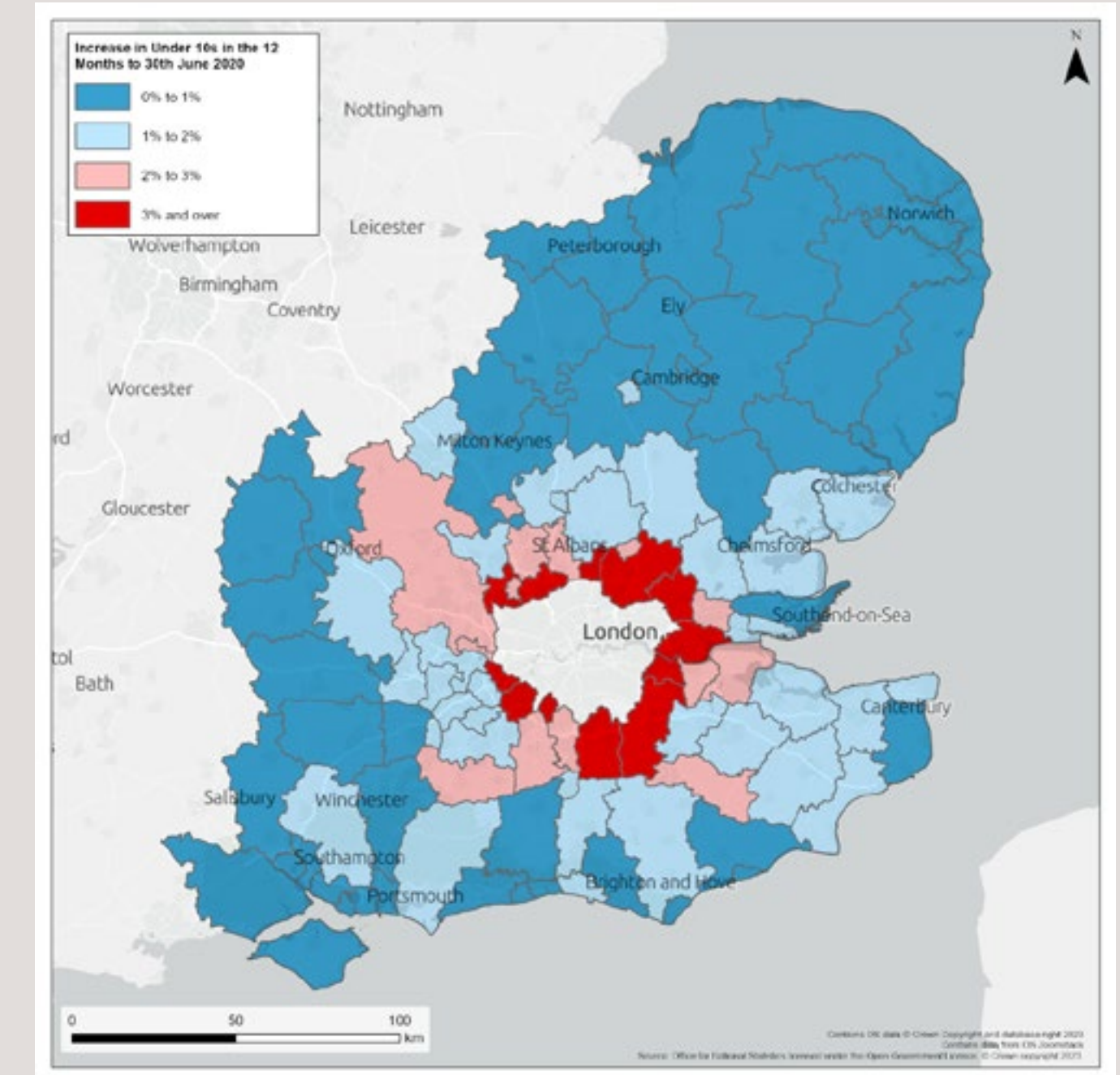
Table 1: under 10s who migrated from Greater London in the year to June 2022

Rank	Local Authority	As % of resident total population in LA
1	Dartford	5.6%
2	Epsom and Ewell	5.6%
3	Tandridge	5.0%
4	Hertsmere	4.7%
5	Thurrock	4.6%
6	Elmbridge	4.6%
7	Spelthorne	4.5%
8	Epping Forest	4.4%
9	Broxbourne	4.3%
10	Sevenoaks	4.2%

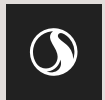
Table 2: % increase in under 10s in the year to June 2022



Year ending 2022



Year ending 2020



Families with older children

Families with older children predominantly move into authorities immediately outside London. In this sense they are similar to their counterparts with younger children – though this is a significantly smaller group, with fewer than half as many 10–17-year-olds as under 10s moving out of the capital in the year to June 2022. This may suggest that these families (with generally older parents) are better-able to afford London housing costs, or that out-migration is more likely to take place while children are younger.

5,129 10–17-year-olds moved the other way, so outflows exceed inflows by roughly 3 to 1. Again, this is significant but less stark than the pattern for younger children.

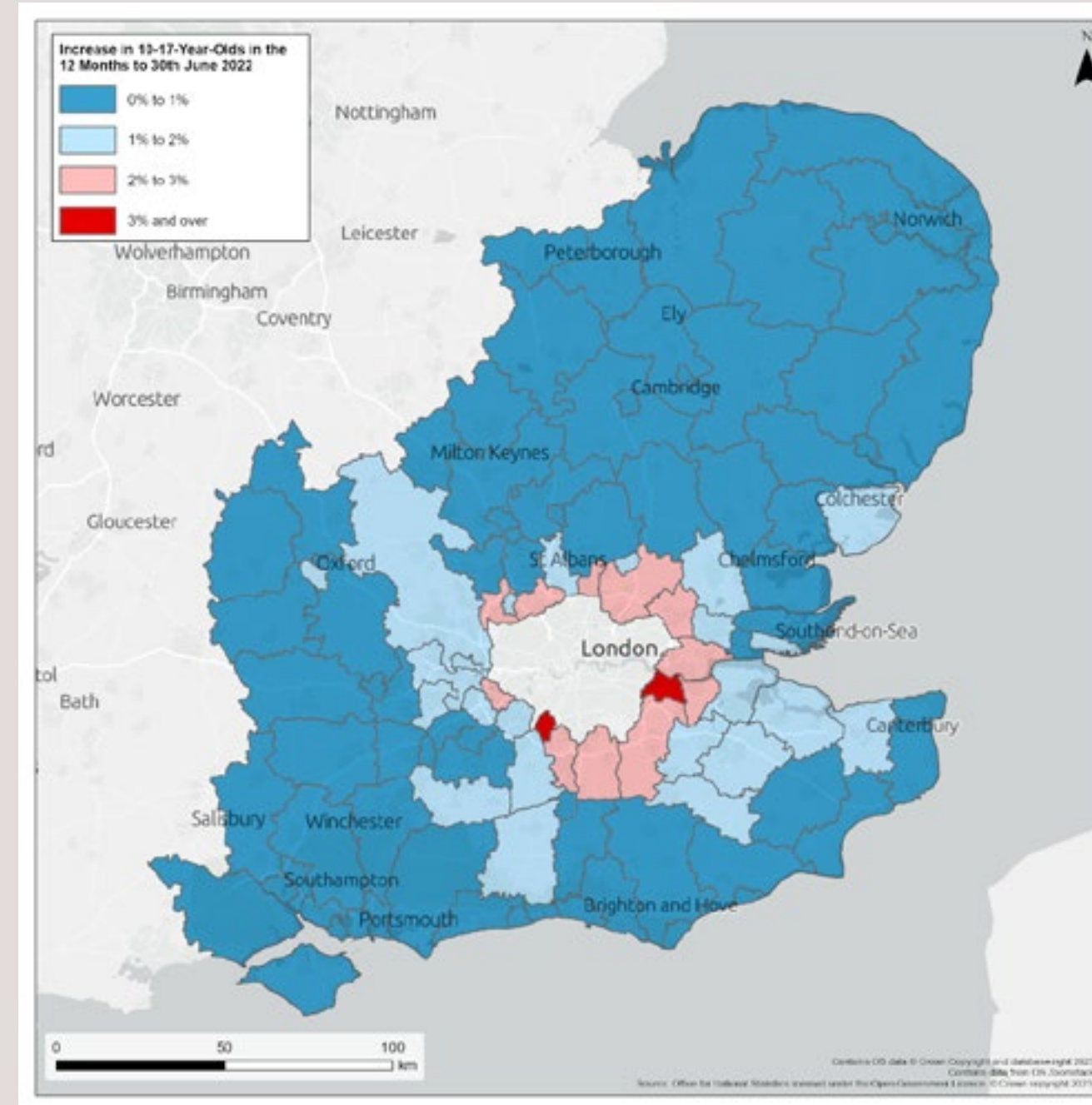
Contrasting 2022 and 2020 outcomes shows increasing pressure in the immediate vicinity of London.

Rank	Local Authority	Migrants from London
1	Buckinghamshire	775
2	Dartford	617
3	Medway	537
4	Thurrock	530
5	Slough	358
6	Windsor and Maidenhead	331
7	Epping Forest	320
8	Hertsmere	317
9	Reigate and Banstead	316
10	Epsom and Ewell	297
	Wider SE total	14,824

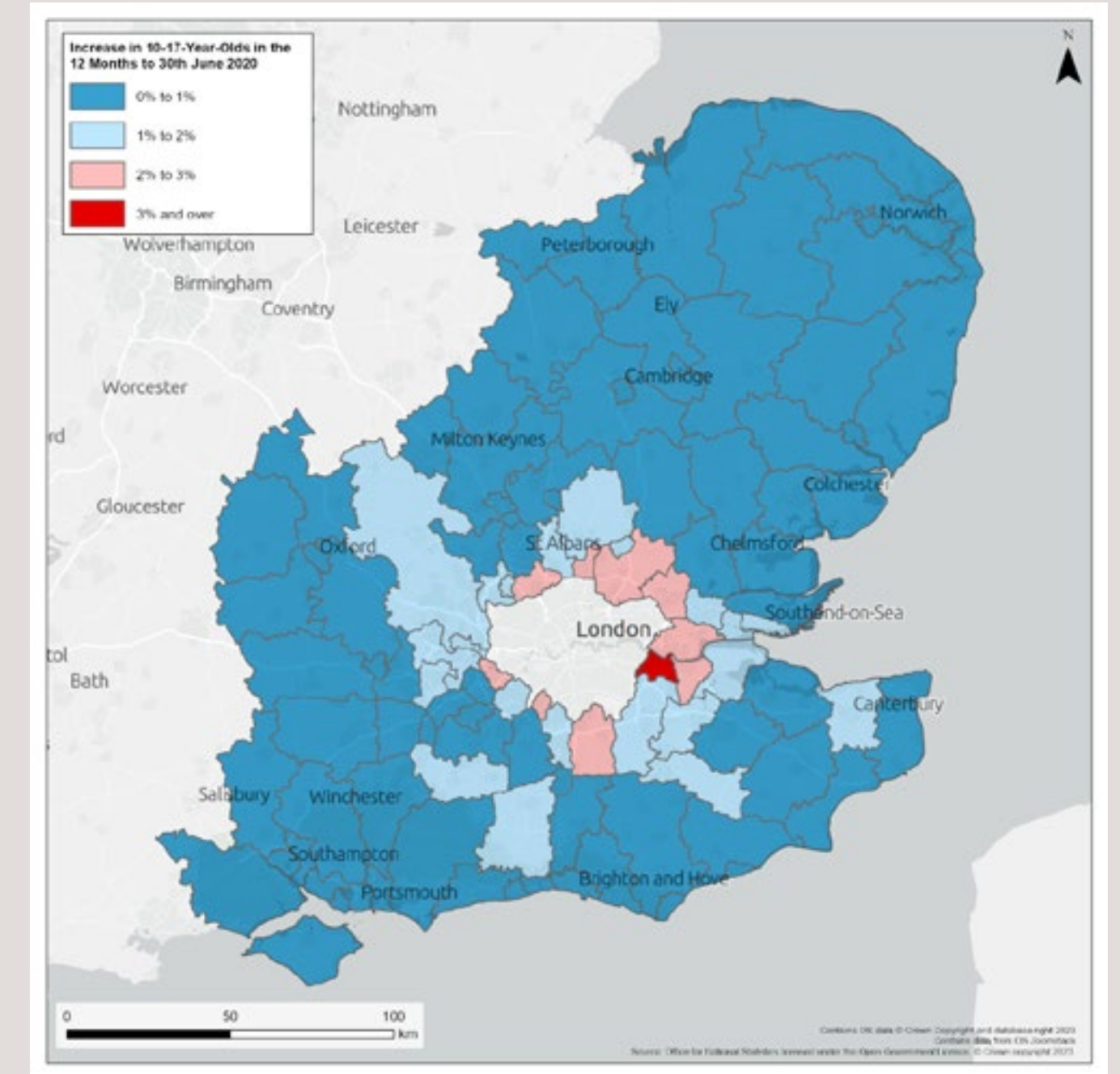
Table 1: 10–17-year-olds who migrated from Greater London in the year to June 2022

Rank	Local Authority	As % of resident total population in LA
1	Dartford	4.8%
2	Epsom and Ewell	3.4%
3	Broxbourne	2.9%
4	Tandridge	2.8%
5	Hertsmere	2.8%
6	Thurrock	2.7%
7	Spelthorne	2.6%
8	Epping Forest	2.5%
9	Three Rivers	2.2%
10	Sevenoaks	2.1%

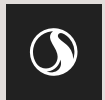
Table 2: % increase in 10–17-year-olds in the year to June 2022



Year ending 2022



Year ending 2020



Students and renters

A major driver of out-migration of 18–24-year-olds is evidently university admissions; the authorities with the largest relative increases correspond closely to university towns and cities. Some of these increases are very large indeed; over 10% in the case of Runnymede and Canterbury.

Uniquely, inflows to London (46,923) exceed outflows for this category. This reflects flows of university students and young graduates into the capital.

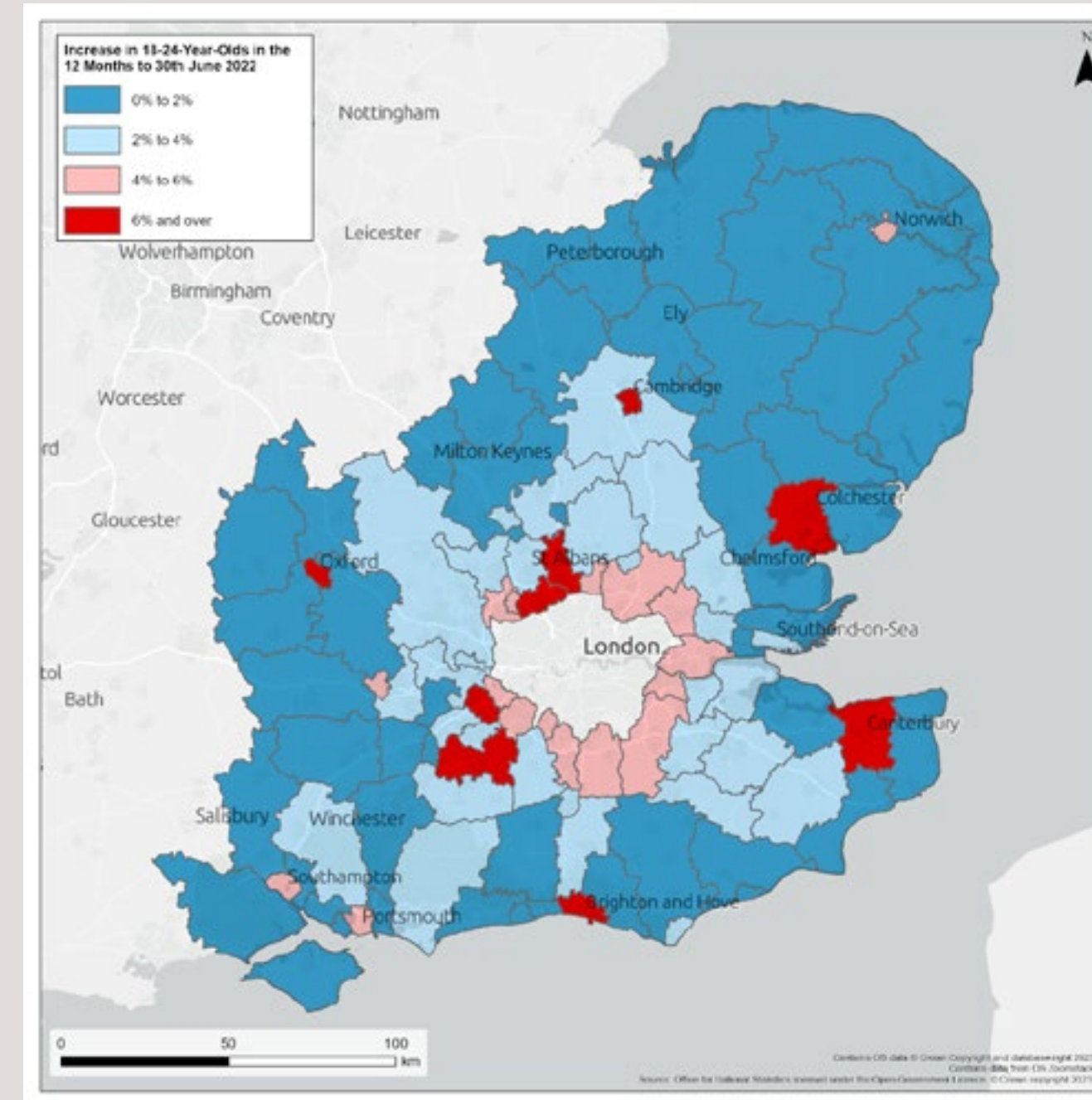
Comparing the results for 2022 and 2020 suggests that there has been little change in the profile of out-migration – this is unsurprising as university admissions are not driven by housing affordability. There has, however, been some increase immediately around London, suggesting that some young adults move out of the capital but seek to remain nearby for commuting purposes.

Rank	Local Authority	Migrants from London
1	Brighton and Hove	2,688
2	Cambridge	2,286
3	Canterbury	2,171
4	Oxford	2,104
5	Southampton	1,612
6	Guildford	1,321
7	Runnymede	1,182
8	Colchester	1,136
9	Norwich	1,119
10	Portsmouth	1,113
	Wider SE total	38,040

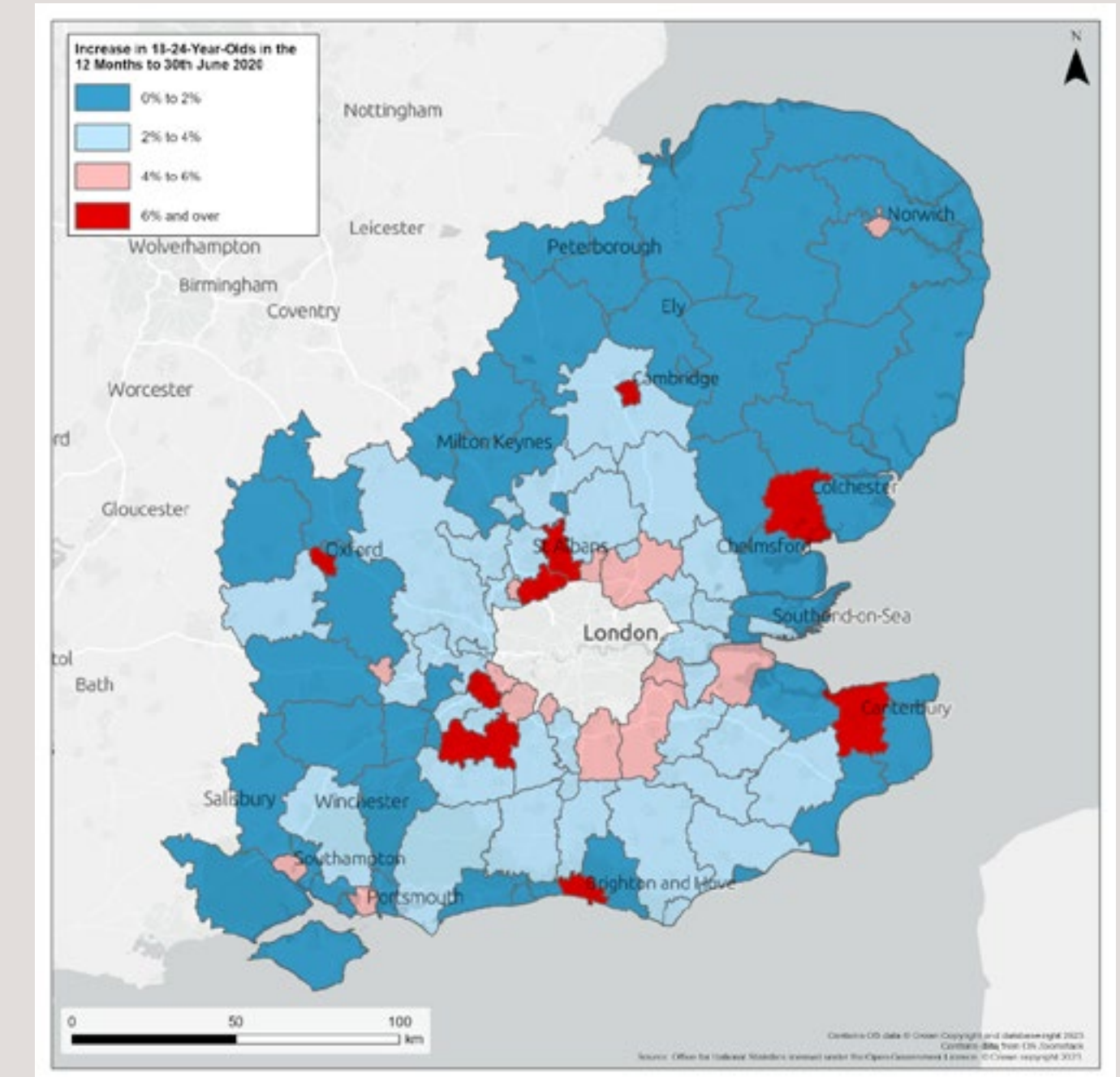
Table 1: 18–24-year-olds who migrated from Greater London in the year to June 2022

Rank	Local Authority	As % of resident total population in LA
1	Runnymede	10.6%
2	Canterbury	10.3%
3	Cambridge	8.0%
4	Welwyn Hatfield	7.1%
5	Brighton and Hove	7.1%
6	Guildford	7.1%
7	Oxford	6.4%
8	Colchester	6.4%
9	Hertsmere	6.1%
10	Dartford	5.6%

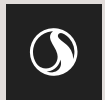
Table 2: % increase in 18–24-year-olds in the year to June 2022



Year ending 2022



Year ending 2020



First time buyers

Those aged 25–44 are by far the biggest group moving out of the capital, suggesting many Londoners have to leave the city when seeking to get onto the housing ladder.

57,858 25–44-year-olds migrated into London, so outflows outstripped inflows by a factor of 2 to 1.

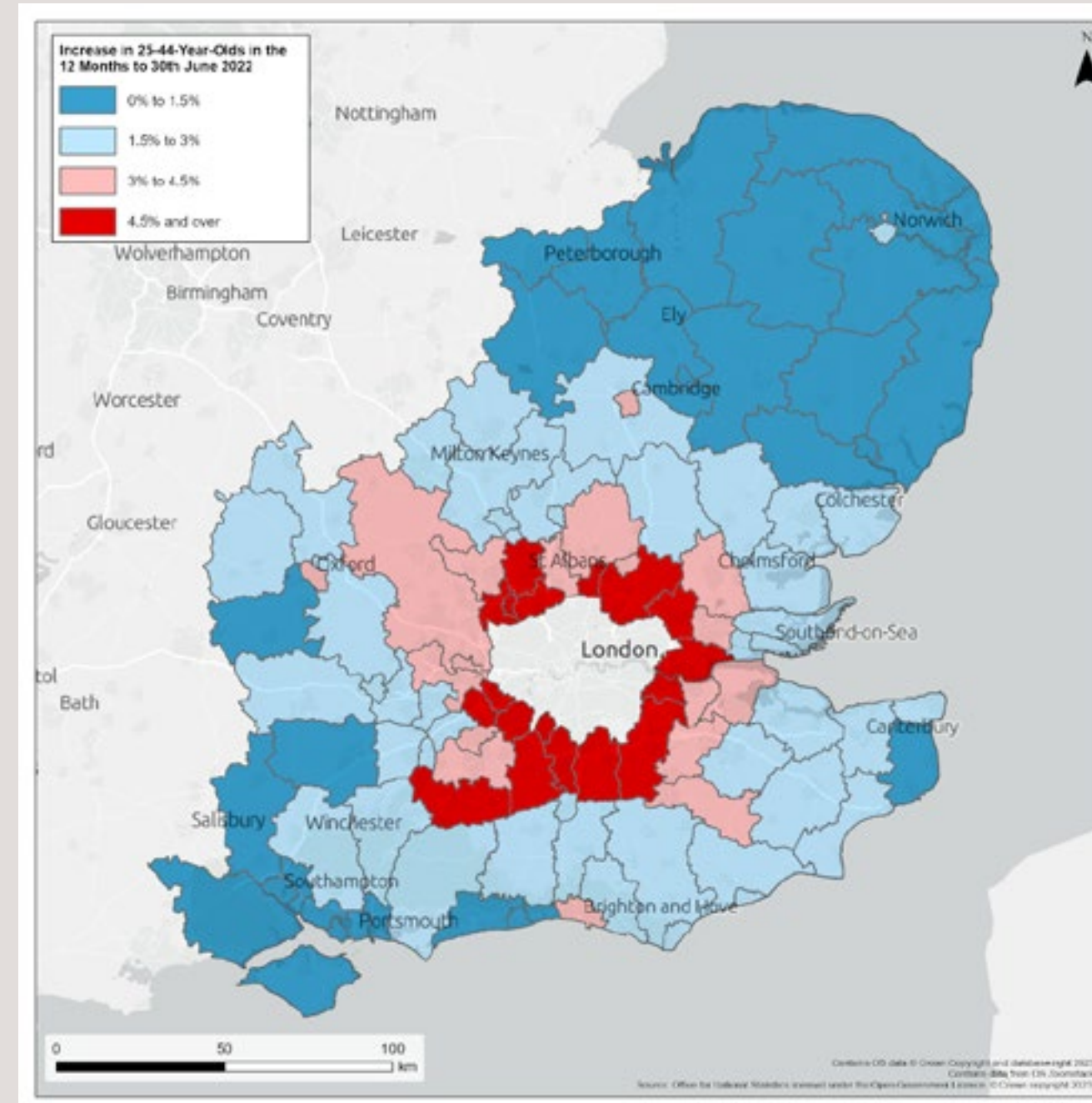
The distribution of out-migration is quite similar to that for under 10s (many of which will be in the same households) and has changed little since 2020 – though greater impacts in authorities further outside London reinforces the view that affordability pressures are increasing, and that some hybrid workers may be making longer commutes.

Rank	Local Authority	Migrants from London
1	Buckinghamshire	5,246
2	Brighton and Hove	2,845
3	Elmbridge	2,807
4	Dartford	2,737
5	Thurrock	2,715
6	Medway	2,495
7	Epping Forest	2,427
8	Reigate and Banstead	2,406
9	Slough	2,114
10	Hertsmere	2,060
	Wider SE total	111,710

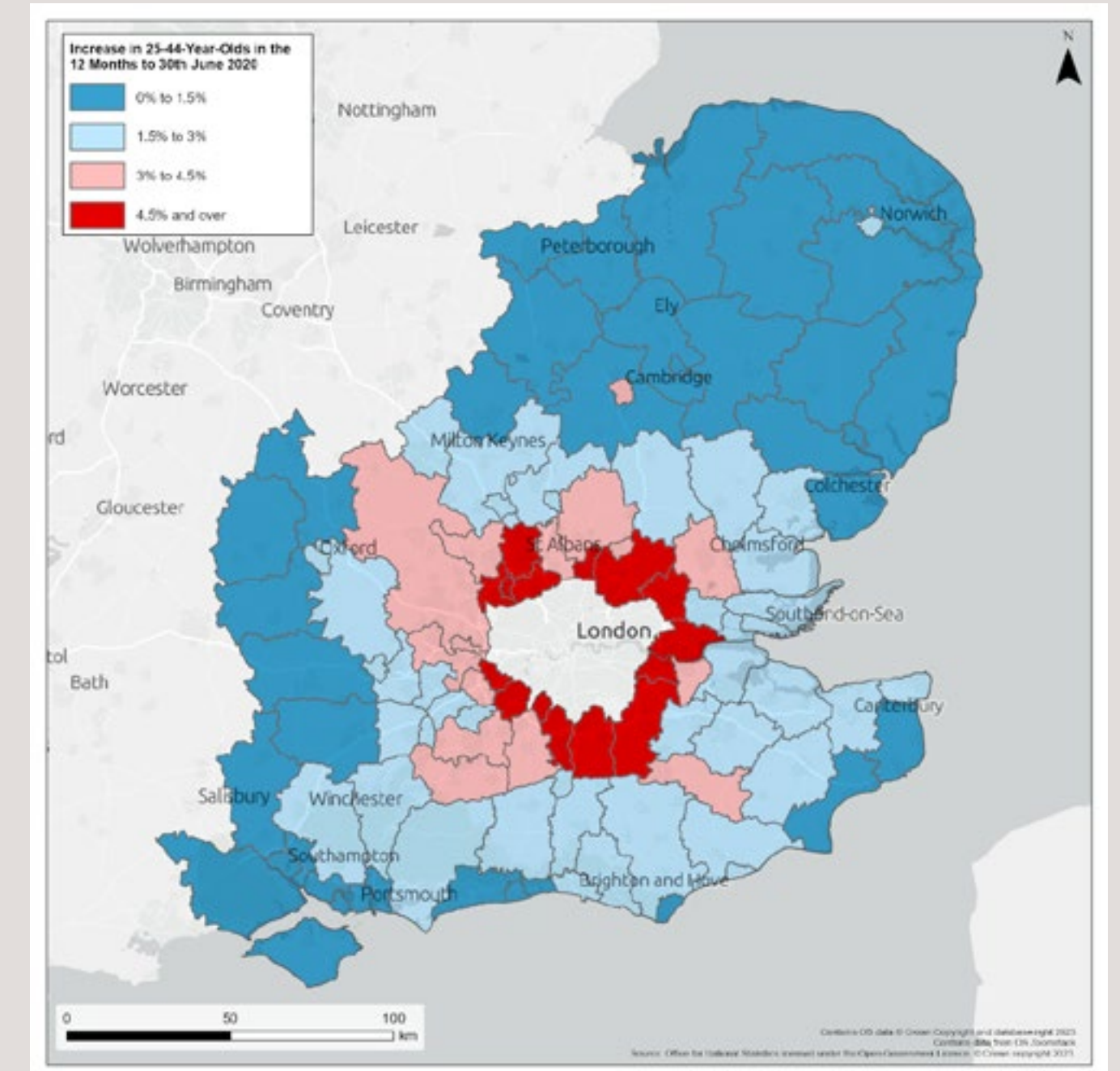
Table 1: 25–44-year-olds who migrated from Greater London in the year to June 2022

Rank	Local Authority	As % of resident total population in LA
1	Elmbridge	8.4%
2	Epsom and Ewell	7.9%
3	Tandridge	7.6%
4	Dartford	7.4%
5	Hertsmere	7.3%
6	Epping Forest	7.1%
7	Spelthorne	7.0%
8	Broxbourne	6.5%
9	Sevenoaks	6.4%
10	Brentwood	6.2%

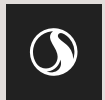
Table 2: % increase in 25–44-year-olds in the year to June 2022



Year ending 2022



Year ending 2020



Homeowners with equity

Total out-migration by 45–64-year-olds and the impacts on destination authorities are considerably smaller than for 25–44-year-olds, suggesting that housing affordability pressures are felt less keenly by this group. These households may include those on higher incomes who were able to buy property in London, or at least to more comfortably afford market rent, so choose not to move out of the capital.

Nevertheless, relatively few households come the other way – outflows exceed inflows (11,867) by 3 to 1.

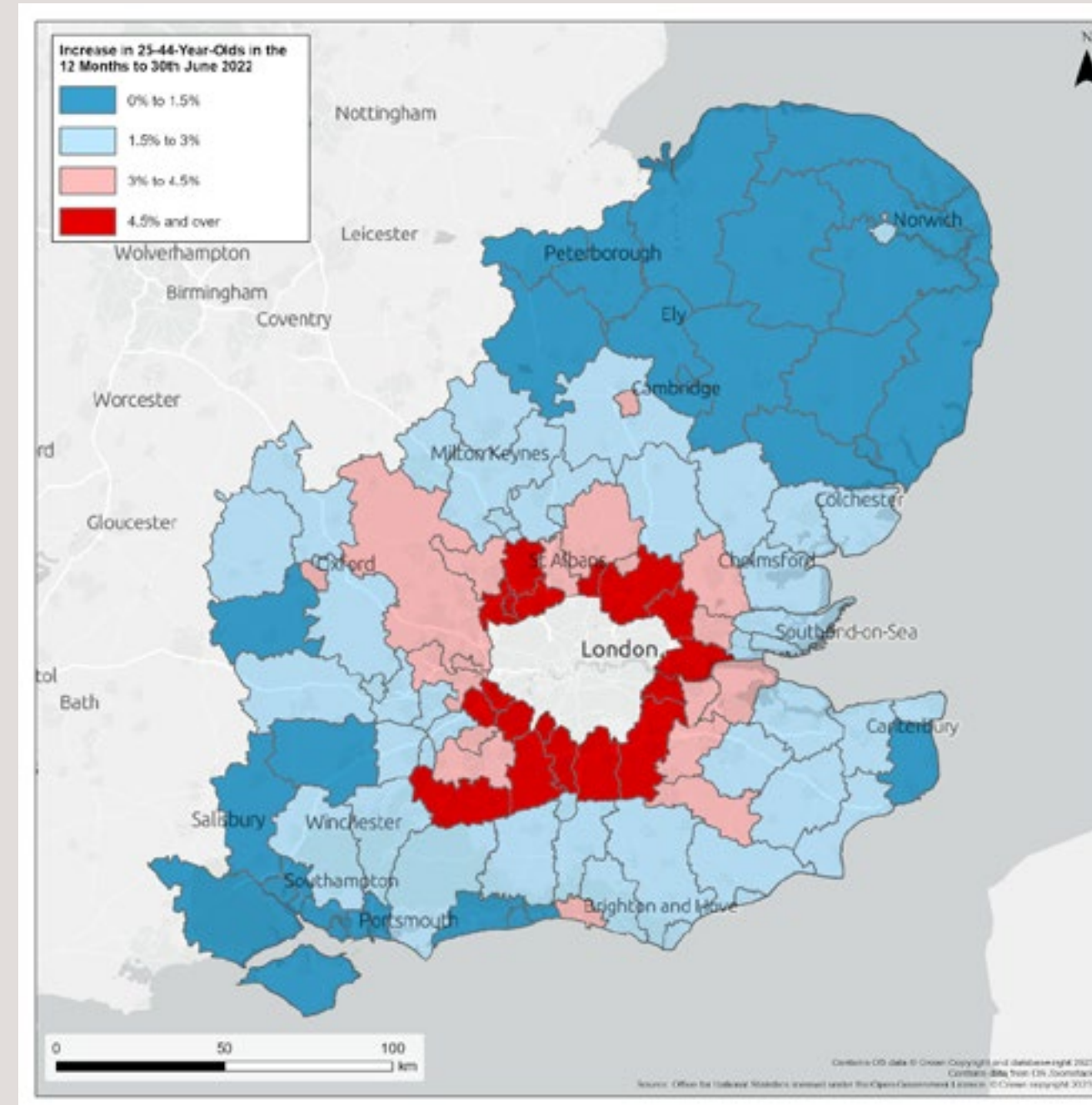
As with other age groups, impacts in the immediate vicinity of London have increased since 2020. There are also increased impacts further afield, for example in coastal districts in Kent and Sussex. This willingness to move greater distances could reflect the growth of hybrid working as well as affordability pressures.

Rank	Local Authority	Migrants from London
1	Buckinghamshire	1,517
2	Medway	895
3	Elmbridge	840
4	Thurrock	812
5	Epping Forest	809
6	Dartford	809
7	Reigate and Banstead	750
8	Brighton and Hove	731
9	Hertsmere	697
10	Sevenoaks	695
	Wider SE total	36,206

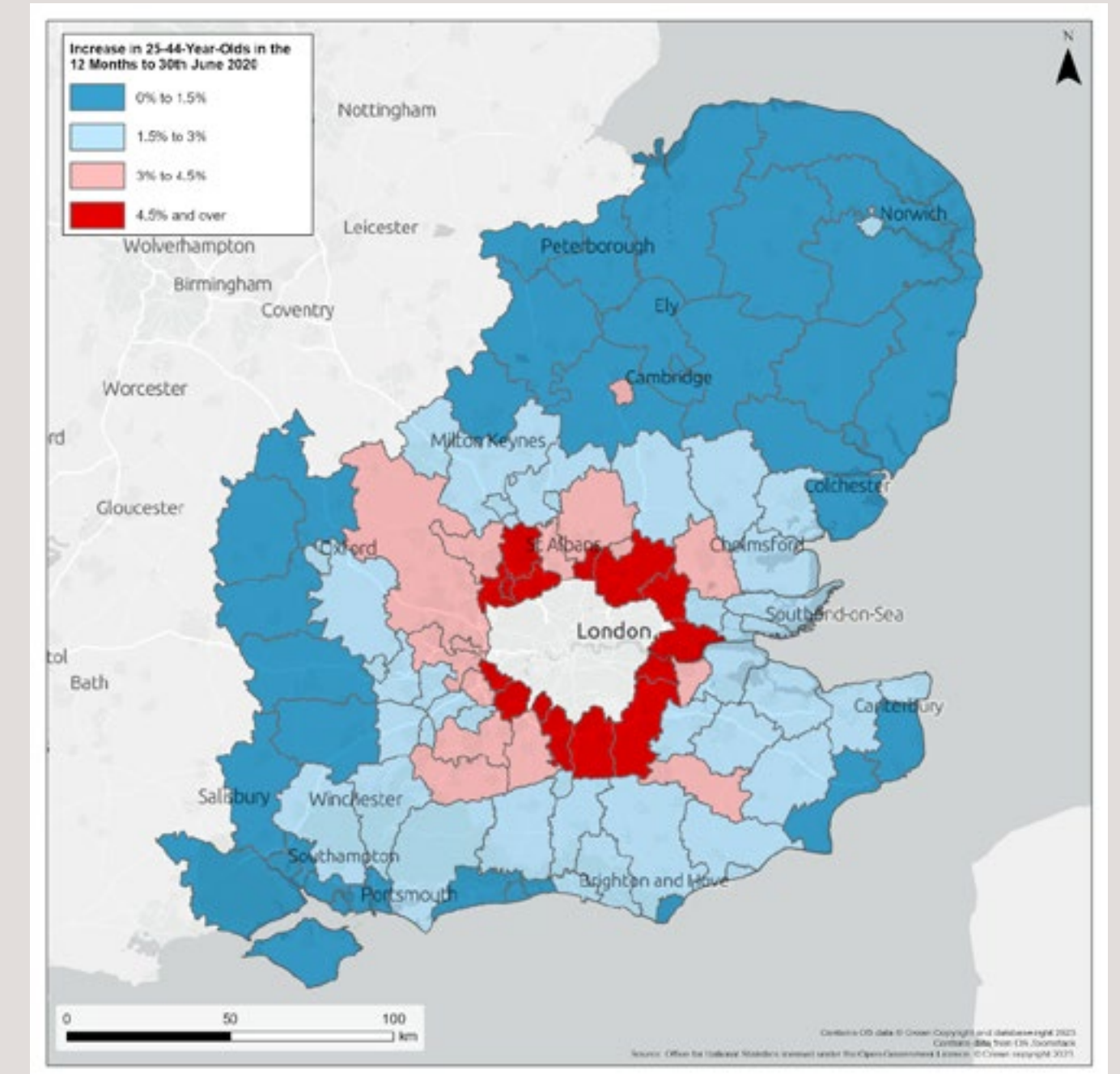
Table 1: 45–64-year-olds who migrated from Greater London in the year to June 2022

Rank	Local Authority	As % of resident total population in LA
1	Dartford	2.8%
2	Hertsmere	2.4%
3	Spelthorne	2.4%
4	Broxbourne	2.3%
5	Tandridge	2.3%
6	Epping Forest	2.2%
7	Epsom and Ewell	2.2%
8	Sevenoaks	2.1%
9	Elmbridge	2.1%
10	Thurrock	1.9%

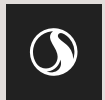
Table 2: % increase in 45–64-year-olds in the year to June 2022



Year ending 2022



Year ending 2020



Retirees

Movement of over 65s outside London represents a relatively small component of out-migration. As with other age groups, much of this movement is into the immediate periphery of the capital. This suggests a desire to stay in close travelling distance of London; this may be for commuting purposes for those working after retirement age, or to be near to family for others.

Similarly to 45–64-year-olds, outflows are roughly 3 times as much as inflows (4,230).

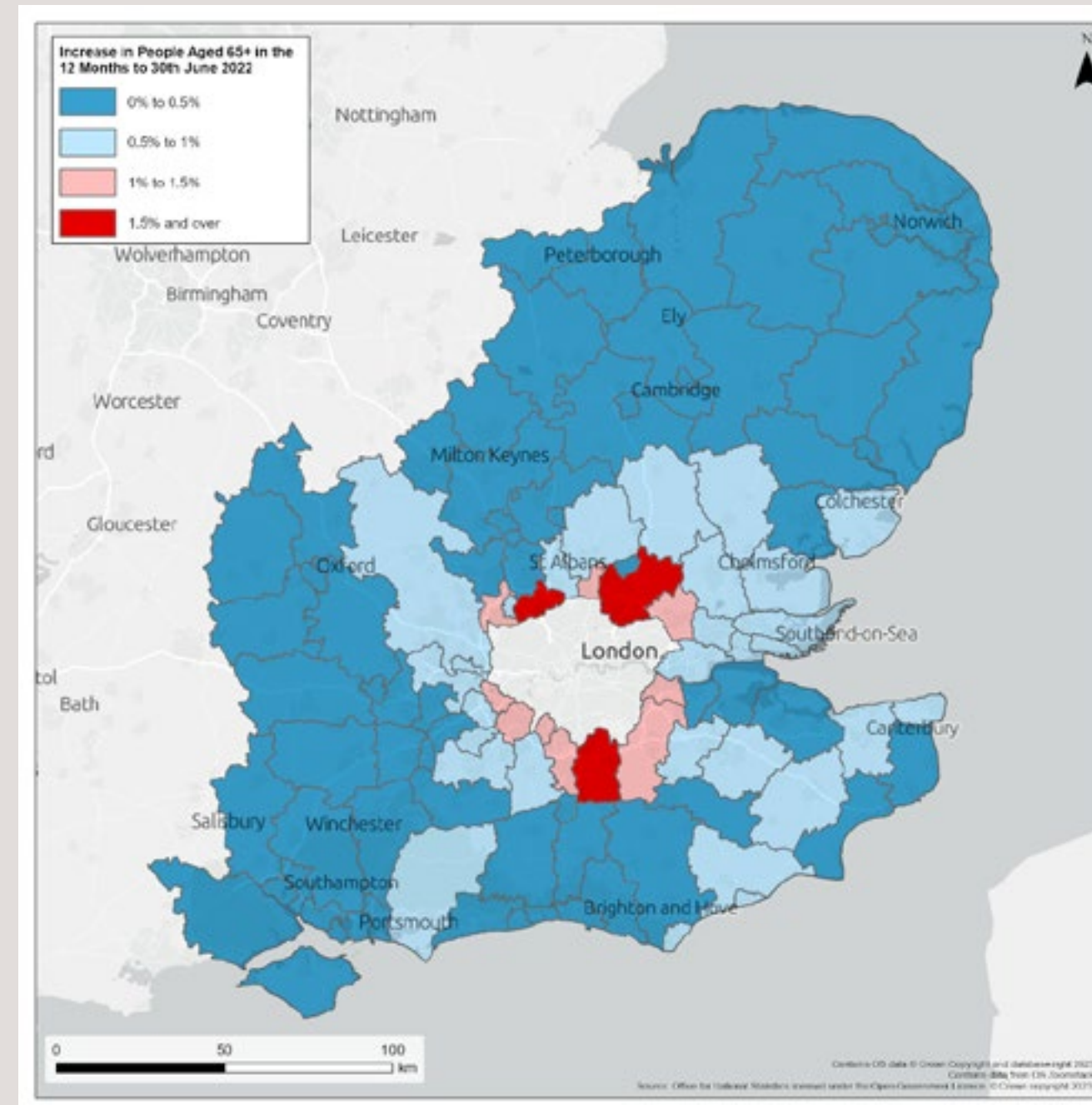
Since 2020, the impact of moves immediately around the capital has increased. There are also significant moves to coastal locations, seen as traditional retirement destinations. Impacts in Kent, Essex, and Buckinghamshire have increased.

Rank	Local Authority	Migrants from London
1	Buckinghamshire	569
2	Epping Forest	524
3	Hertsmere	428
4	Tendring	380
5	Reigate and Banstead	335
6	Sevenoaks	331
7	Tandridge	292
8	Elmbridge	270
9	Arun	235
10	Canterbury	235
	Wider SE total	14,779

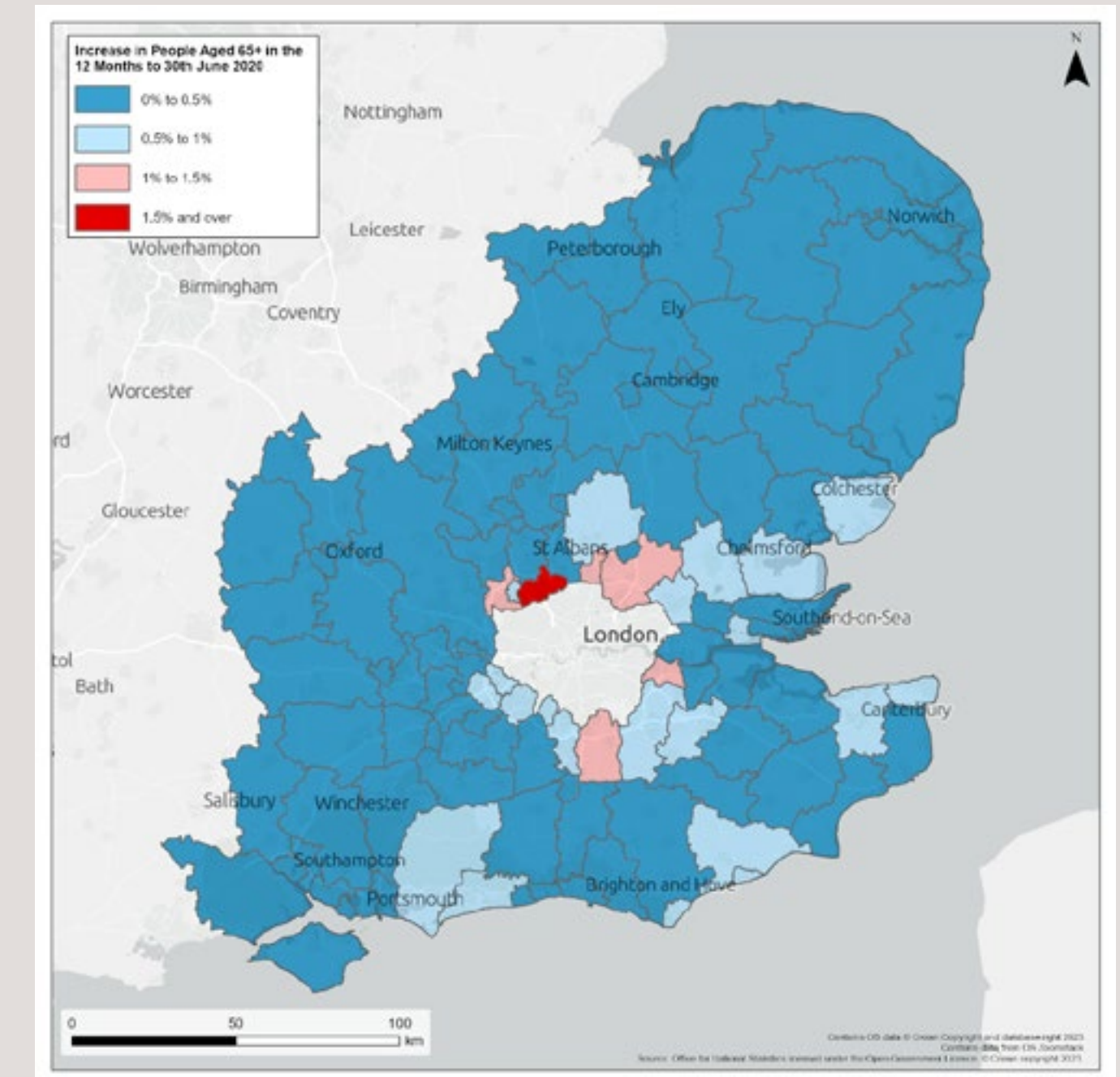
Table 1: over 65s who migrated from Greater London in the year to June 2022

Rank	Local Authority	As % of resident total population in LA
1	Hertsmere	2.2%
2	Epping Forest	1.9%
3	Tandridge	1.6%
4	Brentwood	1.3%
5	Sevenoaks	1.3%
6	Reigate and Banstead	1.2%
7	Spelthorne	1.2%
8	Broxbourne	1.1%
9	Elmbridge	1.1%
10	Three Rivers	1.1%

Table 2: % increase in over 65s in the year to June 2022



Year ending 2022



Year ending 2020



Key contacts

“Net outward migration from London to the WSE creates pressure on the housing market and in turn pressure on local community infrastructure. We must ensure that in addition to planning for the right amount of homes, we’re also providing sufficient schools, healthcare and community space.”

Debbie Mayes
Development Economics
Associate Director
debbie.mayes@stantec.com

“The scale and nature of migration from London to the WSE have changed over recent years. Outflows for all age groups have grown, with impacts intensifying both immediately around London and growing further afield. This is likely to be a result of housing under-delivery in the capital and could create affordability pressures elsewhere without a housing market response.”

Robert Beauchamp
Development Economics
Associate
robert.beauchamp@stantec.com

