



Escape to the country?

How Covid changed London's population

March 2024

Through 2020 and 2021, numerous articles¹ were written about how living through the Covid-19 pandemic was leading city-dwellers to reassess how and where they wanted to live. The switch to working from home was perceived to be severing, or at least weakening, ties to the office, while gardens and access to the outdoors were rising up the list of priorities. Some made predictions that these changed preferences would persist post-pandemic.²

But was there a pandemic-induced escape to the country, and, if so, has there been a permanent shift away from the city? This briefing reviews the evidence.

Box 1: Data used in this report

Population statistics: Data is published at the local authority level by the Office for National Statistics (ONS). The data is provided for total population at mid-year (end of June), and analysis therefore considers changes between July to June, rather than calendar years. These 12-month periods are referred to as 2014-15, 2015-16 and so on.

Internal migration statistics: The ONS publishes data on movement by people of different ages between local authorities within England and Wales, and between Scotland and Northern Ireland and individual English and Welsh local authorities. This data uses changes in GP registrations as its primary data source and uses supplementary information to correct for things such as university leavers remaining registered with their university GP. Due to the increased interaction people are likely to have had with

¹ For example, see [The Guardian, September 2020. Escape to the country: how Covid is driving an exodus from Britain's cities](#)
² [Bloomberg, August 2022. Londoners Leaving the City in Doves as Covid Trend Persists](#)

the NHS when Covid vaccines were rolled out it is possible that this data may have been affected, but given that getting a vaccine did not require interaction with a GP this seems unlikely.

Natural increase: Data on births and deaths is provided by the ONS. Deaths data is provided month by month, and is assigned from mid-year to mid-year accordingly. Births data is provided by calendar year. These figures are apportioned to match mid-years used for the other data, with an adjustment for variation in birth-month popularity (July to December (50.8per cent); January to June (49.2per cent)).

Private rental prices: Data for average private rental prices, available at local authority level, is published by the ONS. These data are experimental and are due to be replaced in Spring 2024, but are accurate enough to illustrate the differences between authorities over the period studied. Data is not available for the City of London.

Primary Urban Areas: The Centre for Cities analyses cities and towns using a measure of their “built up” area. The definition of Primary Urban Areas can be found at <https://www.centreforcities.org/city-by-city/puas/>.

Covid-19 timeline and data: Data from mid-2014 to mid-2019 is not impacted by the pandemic. The analysis below uses data from these years to create a five-year ‘pre-pandemic’ average. 2019-20 is mostly a Covid unaffected year but captures the first lockdown so is not included in the pre-pandemic average. 2020-21 captures the remaining lockdowns and the majority of the time with most severe restrictions. ‘Freedom Day’ was 19th July, 2021. International travel restrictions ended on 18th March, 2022.

GitHub: All the input and output data and R scripts used for this report can be found on our GitHub repository <https://github.com/CentreforCities/urban-population-internal-migration>.

Urban population growth halted during the Covid pandemic

Prior to the pandemic, the UK was slowly becoming more urban. The share of the population living in its largest 63 cities and towns increased every year between 2009-10 and 2018-19 (from 55.7 to 56.3 per cent).

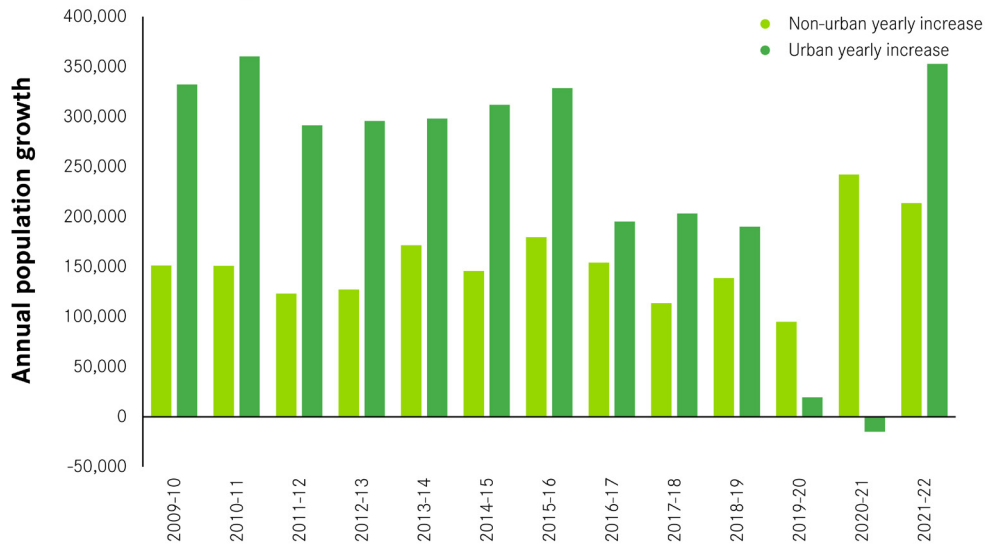
The pandemic reversed this trend. While UK population growth slowed through the pandemic (to 0.3 per cent per year, compared to the preceding 10-year average of 0.7 per cent), cities stopped growing entirely. Between mid-2020 and mid-2021, while the non-urban population increased by 242,000 people, the number living in the UK’s 63 largest cities and towns declined by 15,000.

This 0.04 per cent decline in urban population hardly represents an exodus, but,

as Figure 1 shows, the pandemic altered the prevailing trend.

Figure 1: Urban population growth halted during the Covid-19 pandemic

Annual population growth, urban and non-urban areas, 2010-2022



Source: ONS

But far from this persisting, there was a strong rebound in population growth in 2021-22. Between mid-2021 and mid-2022, the urban population bounced back and increased by 353,000 people. This 1 per cent increase exceeded the 10-year average that preceded the pandemic of 0.8 per cent per year and was faster than the non-urban growth rate.

It was a London thing

The pandemic hit the growth rate of cities of all sizes³, but as Figures 2 shows, **the shrinking urban population is driven by what happened in London.**

London's population declined by 75,500 people (-0.7 per cent) between mid-2019 and mid-2021, the equivalent of losing a town the size of Tunbridge Wells. This is a significant change, but is considerably fewer than the hundreds of thousands predicted by some⁴, and a lot less than the 14 per cent surveyed by the London Assembly who said they wanted to leave London as a result of the pandemic⁵.

The only other cities to see population decline were Nottingham, which shrank by 4,150 people (-0.6 per cent) and Birmingham, which lost 3,300 people (-0.1 per cent). This is in keeping with 2022 analysis of data from 13 OECD countries⁶, which found that a pandemic-related shift away from urban living was only evident in larger urban areas.

3 Cities are grouped by mid-2022 population size. Groupings are as follows: small – less than 250,000; medium – between 250,000 and 600,000; large – more than 600,000; London (10,148,784).

4 For example, see: [The Guardian](#), London Population set to decline for first time since 1998 -report, 7 January 2021.

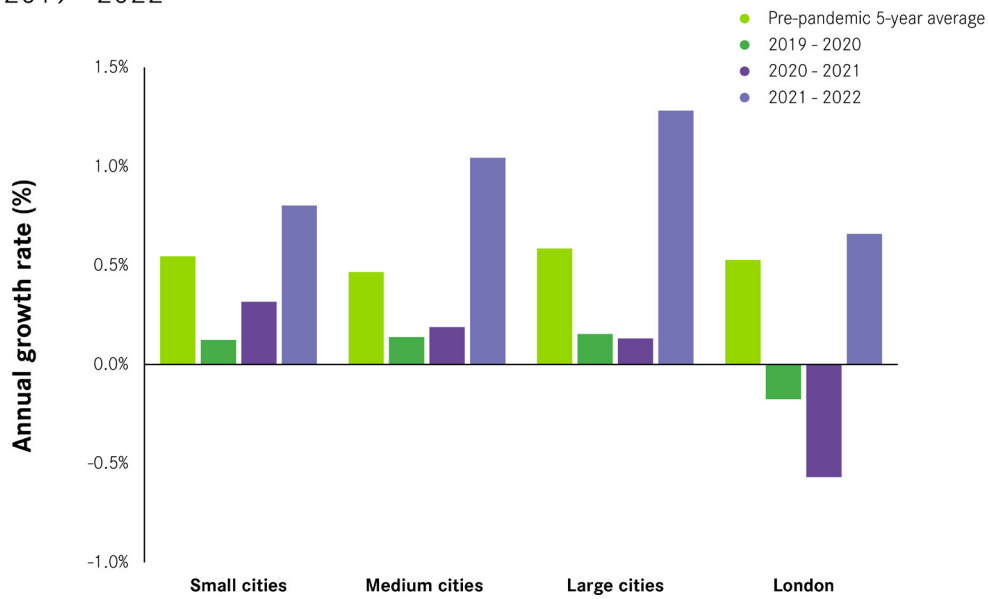
5 [The London Assembly](#). Half of Londoners wanting to move home want out of London.

6 OECD (2022), [OECD Economics Department Working Papers: Changes in the geography housing demand after the onset of COVID-19: First results from large metropolitan areas in 13 OECD countries](#), Paris: OECD

In cities of all sizes, the 2021-22 growth rate was greater than the average pre-pandemic year. Large cities grew nearly twice as fast. While London also returned to higher than pre-pandemic growth, recovering nearly all of this population loss by adding 66,000 people (see Figure 3), it grew more slowly than average small, medium or large cities. It appears that London was hit harder and for longer than other cities.

Figure 2: London’s growth rate was negative during the Covid-19 pandemic

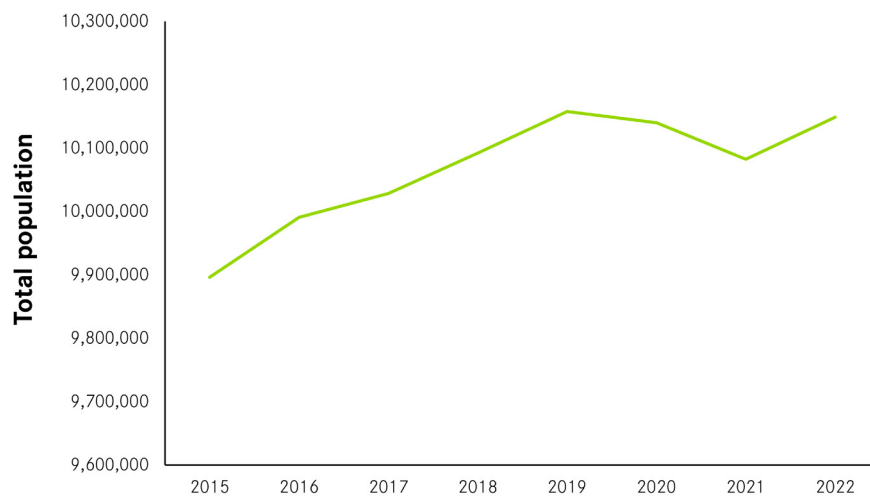
Annual growth rate in UK PUAs by city size, pre-pandemic 5-year average and 2019 - 2022



Source: ONS

Figure 3: London’s population shrank during the pandemic but returned to growth in 2021-22

Total population in the London primary urban area, June 2015 - June 2022



Source: ONS

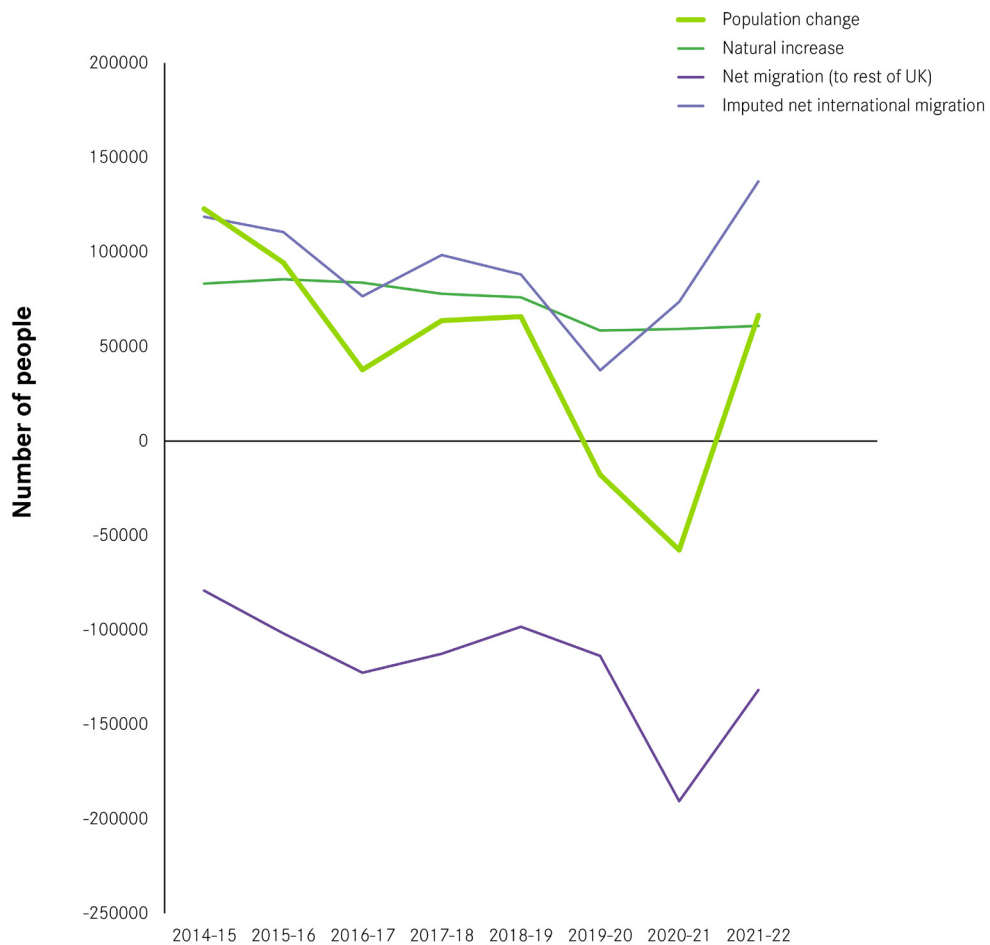
So, what happened in London?

London’s population decline in 2020 and 2021 was driven by a combination of an unusually large number of people moving from London to the rest of the UK, and lower numbers of people moving into London from other countries.

Figure 4 shows how the relative contribution of these components changed between 2014 and 2022.

Figure 4: Changes to net internal and international migration drive changes in London’s total population

London population change and factors contributing to population change, 2014 - 2022



Source: ONS, Centre for Cities calculations

In normal years, London’s population growth is only maintained by positive natural increase and net positive international migration. The Capital normally loses population to the rest of the country. On average, between mid-2014 and mid-2019, 104,000 more people per year left London to go elsewhere in the UK than moved in.

During the pandemic there were changes to all components, but it was trends in

migration that dictated London's decline in population, and subsequent bounce-back.

London's rate of natural increase has declined over the seven years to 2022. Excess deaths due to Covid-19 were partly responsible, but the prevailing trend of declining natural increase was mostly a result of falling birth rate. There were 14.6 per cent fewer births in London in 2022 compared to 2015, more than the 10 per cent decline in the rest of England and Wales.

Net migration to London from other countries⁷ was lowest in the Covid-affected years but remained positive: an increase of 38,170 in 2019-20 and 73,660 in 2020-21. A large increase in international migration to the Capital explains the majority of London's post-pandemic population bounce back.

Ultimately though, **changes to internal migration patterns drove the drop in population between 2020 and 2021**. During the pandemic, something shifted – either people weren't arriving in London at their usual rates, or they were escaping to the country.

The rest of this briefing uses the detailed ONS data available on migration between local authorities in England and Wales to explain what happened.

Population decline was driven by people moving out of London

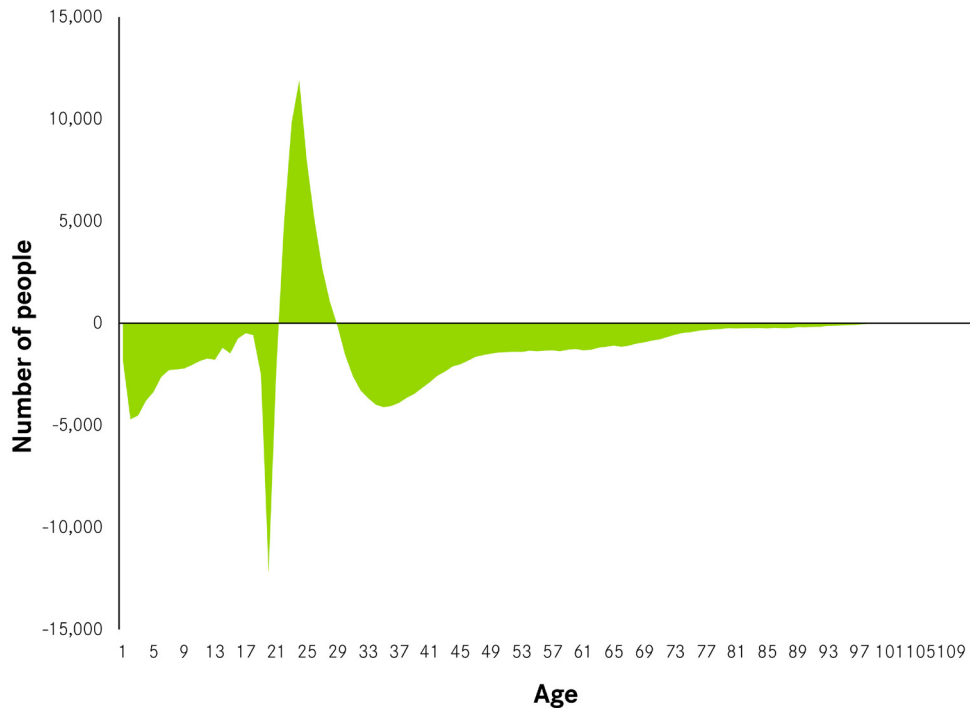
During 2020-21, the most Covid-affected year, London saw abnormal out-migration to the rest of England and Wales, and it was this that drove the decline in London's population.

To understand this in context, it is important to understand how migration flows work in normal years. Figure 5 shows the typical story: 18- and 19-year-olds move out of London for university, while people in their early 20s move in to start their careers. People move out again during their thirties, often taking young children with them (one child aged 0-5 leaves London for every 3.5 people aged 30-45). And the balance of these flows, as shown in Figure 4, is that London loses people to the rest of the country.

⁷ Imputed by subtracting the sum of net internal migration and natural increase from total population change.

Figure 5: Net migration to London from the rest of England and Wales is only positive for those aged 20 to 27

Average net population flows between London and the rest of England and Wales by age, pre-pandemic 5-year average



Source: ONS

Figure 6 shows how this pattern changed during 2020-21. For all ages under 20 and above 26, there is a larger net outflow of people than in a normal pre-Covid year. While this is slightly counter-balanced by a small increase in mid-20-year-olds moving into London, the net loss of population from London was exceptionally large at -191,000 people (88,000 more than in a normal year). This additional out-migration is equivalent to nearly one per cent of Londoners, or one full Wembley Stadium.

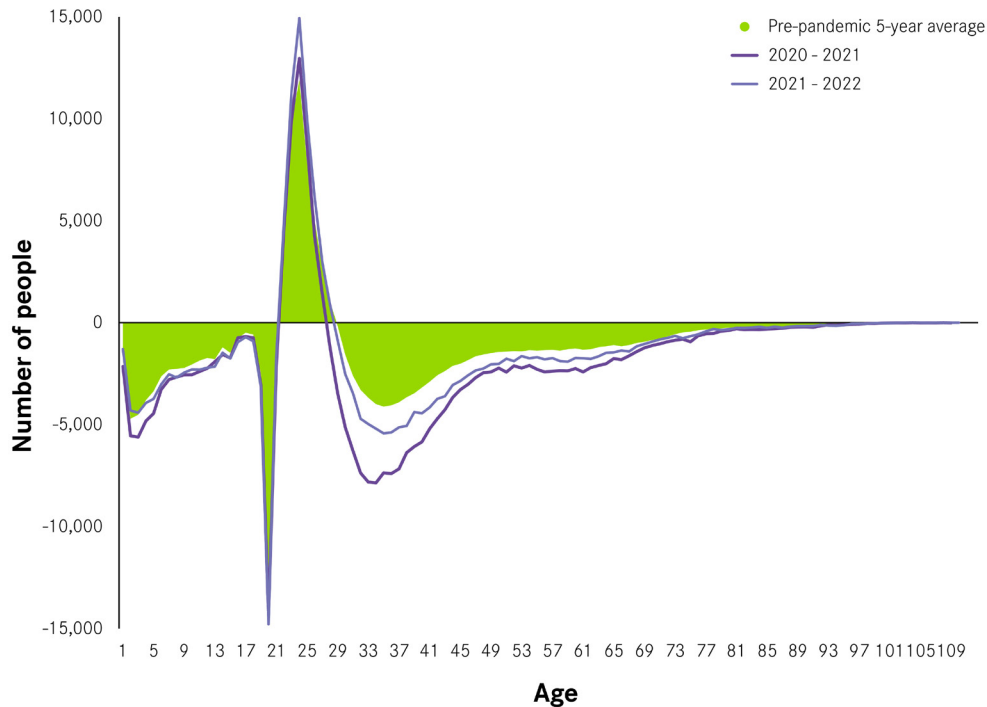
30-45-year-olds were the age group that left in the most abnormally large numbers. There was a net loss of 93,600 people in this age group, almost double a normal year.

Most of this increase was driven by people without children. While there was an increase in the number of children leaving London, the increase in parent-aged people leaving was greater. In 2020-21, 4.4 30-45-year-olds left the Capital for every young child that did so, up from 3.5.

Interestingly though, the increase in net outflow was driven by more people leaving rather than fewer people arriving in the Capital. The number of people moving into London was actually 8 per cent higher in 2020-21 than in an average year between 2014 and 2019.

Figure 6: Net outflow of population from London increased during 2020-21

Net population flows between London and the rest of England and Wales, pre-pandemic 5-year average and 2020 - 2022



Source: ONS

The following year saw a return toward normal trends. In 2021-22, net population loss was 29,000 greater than in an average pre-pandemic year. This is less than one third of the additional loss seen in the most covid affected year.

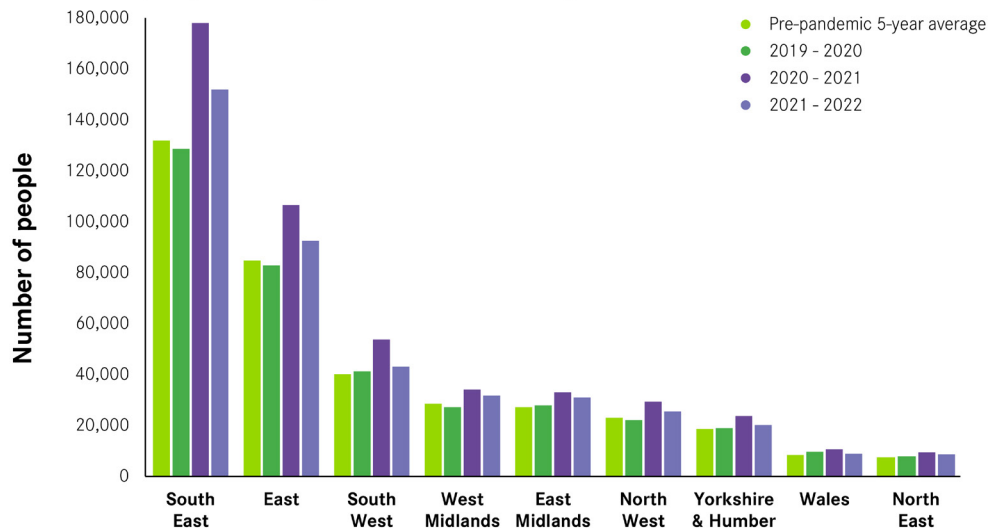
London leavers mostly stayed local

The pandemic didn't lead to a significant shift in the locations Londoners chose for their next homes. **The Greater South East remained the most popular destination** – before, during, and after the pandemic, between 58 and 59 per cent of people moving out of London moved to locations in the neighbouring South East and East. Cornwall might have received more homebuyer searches⁸ than London in early 2021, but, as Figure 7 shows clearly, there was no significant shift in end-destination through the pandemic.

⁸ [Rightmove. \(March 2021\). Cornwall is the top spot as lockdowns change what home-movers look for](#)

Figure 7: Most people leaving London moved to the Greater South East, before, during and after the pandemic

Number of people moving from London to regions, 2014 – 2022



Source: ONS

Non-urban locations did see a greater increase in popularity compared to urban ones. Within the Greater South East, the number moving to non-urban locations increased by 37 per cent (55,300 people), as compared to 19 per cent (12,700 people) to urban locations. Particularly popular destinations included South Oxfordshire, which saw a 90 per cent increase, and Winchester, which saw a 60 per cent increase.

The South West, the next most popular region, also saw its non-urban locations increase in popularity by more than its urban ones. Wiltshire and Cornwall received 56 and 45 per cent (1,680 and 1,350 people) more in 2020-21 than in a pre-pandemic year, respectively, while Bristol only received 22 per cent (1,350 people) more than normal.

The overall pattern of people moving from regions into London also didn't change. Between 53 and 55 per cent of arrivals were from the Greater South East in all years.

Escape from the inner city

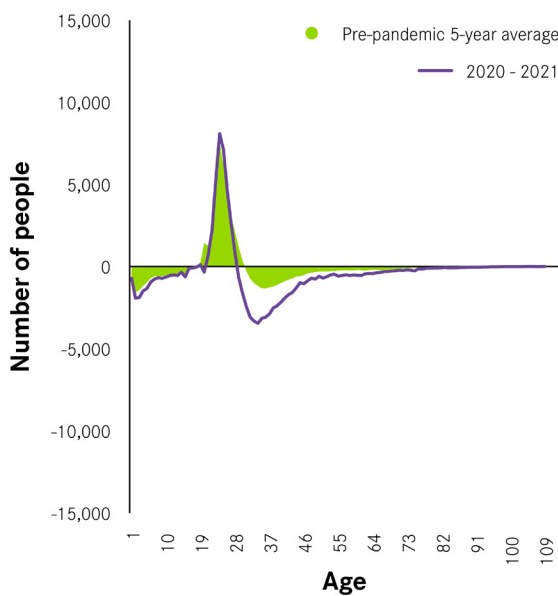
Data on the five years before the pandemic shows that different parts of London played different roles in the exporting and absorbing of people to and from elsewhere in England and Wales. Inner London was a net absorber of people (plus 2,300 people per year between 2014 and 2019); net out-migration from London was entirely a result of a net loss from Outer London (minus 105,000 people per year).

The breaking of this pattern was the most exceptional thing that happened during

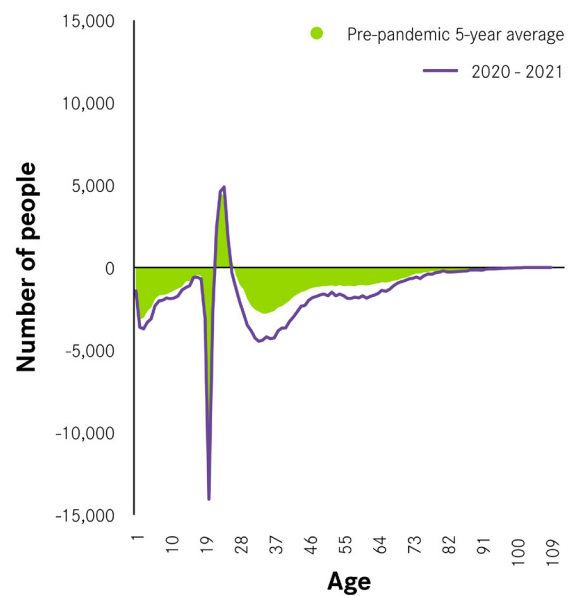
2020-21. While 81 per cent of net out-migration was still from Outer London, Inner London also became a net loser of population to outside of London. As Figures 8 & 9 show, Inner London saw little change in its post-university age influx, but older ages left at higher than usual rates, contributing to a net loss of 36,700 people to outside London. This was mostly driven by a spike in the number of 30–45-year-olds leaving – 25,700 (68 per cent) more than in a normal year.

Figure 8 & 9: Inner London became a net loser of population during 2020-21

Net population flow from Inner London to outside London, 2014 - 2019 and 2020 - 2021



Net population flow from Outer London to outside London, 2014 - 2019 and 2020 - 2021



Source: ONS

Additional out-migration from Outer London occurred across a greater spread of ages. 56-65-year-olds saw the greatest percentage increase in the number of out-migrants, with 50 per cent more people than usual leaving London. And 24,800 more 30-45-year-olds than usual left – 37 per cent more than in an average pre-Covid year.

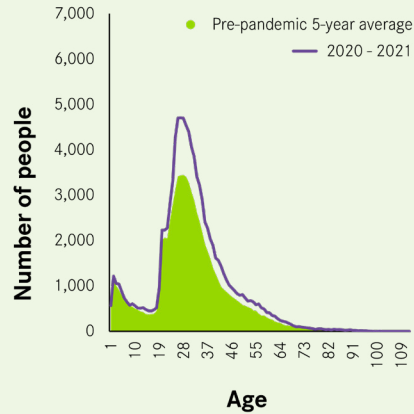
Box 2 looks at flows between Inner and Outer London.

Box 2: Movement within London.

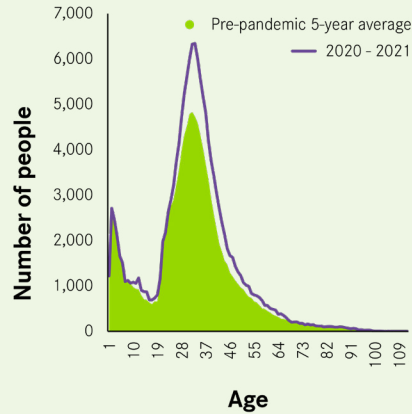
2020-2021 was also a year of increased churn between Inner and Outer London.

Figures 10 & 11: Movement between Inner and Outer London increased in both directions

Migration From Outer to Inner London, 2014 - 2019 yearly average and 2020 - 2021



Migration From Inner to Outer London, 2014 - 2019 yearly average and 2020 - 2021



Source: ONS

Movement in both directions increased by roughly one third for 30-45-year-olds: some followed the general trend outward to less dense areas, while others may have taken advantage of reduced rents in more central locations (see below).

At the same time, there was a 45 per cent increase in the number of 56-65-year-olds moving from Outer to Inner and a 29 per cent increase in people moving in the opposite direction.

The effect of this churn was a seven per cent increase in net movement from Inner to Outer London compared to the average pre-pandemic year.

Local authority-level data points towards a reversal of the pandemic impact

Looking at data for individual local authorities helps untangle this further, and also offers insights into how permanent the changes in behaviour are likely to be.

During 2020-21, all London local authorities experienced greater population outflow. This meant that:

- ‘Exporters’ (every Outer London authority and four Inner London boroughs) saw their net outflow increase.
- Some ‘absorber’ Inner London boroughs (e.g. Tower Hamlets) saw their net inflows decrease but remain positive.
- **Some absorber Inner London boroughs (e.g. Camden) became**

exporters.

Data from the 2021-22 year shows that:

- In almost all exporter local authorities there was a return toward the pre-pandemic norm: the net outflow in 2021-22 was less than in 2020-21, but still greater than the pre-pandemic average.
- **But out of the 10 absorber Inner London boroughs, six saw net inflows in 2021-22 that were higher than the five-year pre-pandemic average.** In Camden, for example, 2,430 more people moved in from elsewhere in England and Wales than moved out, compared to 1,710 in an average pre-pandemic year.

Figure 12 shows visually how net population flows between Inner London boroughs and the rest of England and Wales have changed between 2014 and 2022, highlighting the exporters and absorbers.

Figure 12: Population-absorbing local authorities became population exporters, and then started absorbing again

Net population between Inner London local authorities and outside of London, 2014 - 2022



Source: ONS

These data (the latest available from the ONS) give the first indication that there has been compensatory move-in behaviour in some Inner London boroughs.

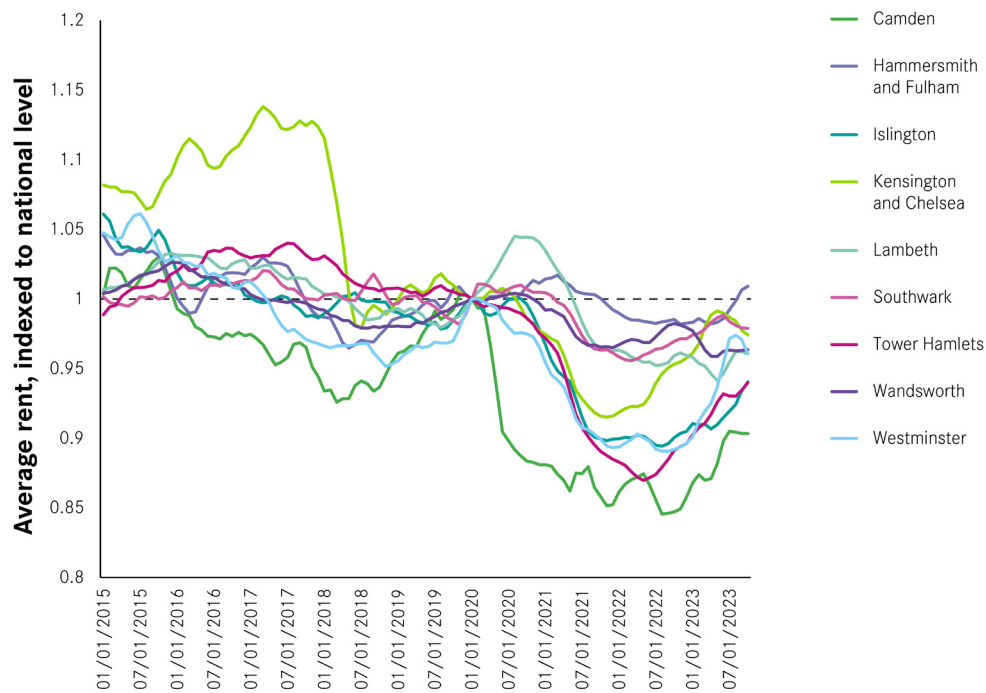
Data on rents suggest that this population bounce back has continued.

Figure 13 shows changes in local average rents relative to changes in the UK average rent,⁹ in Inner London absorber boroughs. Broadly corresponding to the data in Figure 12, there were sharp falls in boroughs such as Camden, Islington and Tower Hamlets in 2020 and 2021. All other Inner London boroughs also saw rents fall relative to the UK average.

But since the pandemic, rents have risen to catch up with changes in the UK average. Annual average rent increases to July 2023 of 17, 15, and 14 per cent in Westminster, Tower Hamlets and Camden, respectively, suggest that relative demand has increased dramatically in these boroughs, as compared with the rest of England, where rents rose by ‘only’ 7.6 per cent over the same period. The Inner London population bounce back appears to have continued apace.

Figure 13: Rents in absorber local authorities dropped and then bounced back

Indexed average private rental price relative to indexed UK average, Inner London absorber local authorities, January 2015 - October 2023 (all indexed to January 2020 prices)



Source: ONS

9 This is an attempt to isolate how local demand changed compared to national average demand by controlling for how increased interest rates and changes to landlord tax reliefs may have potentially constrained the supply of private rented properties across the country through the post-covid period. We are unable to control for how local rents are affected by new properties increasing supply locally or localised landlord licensing constraining it.

Conclusions and implications

Londoners did increasingly escape to the country during the pandemic. But there are a number of things to note:

1. The increase in outflows was relatively small. Given there was no large increase in the availability of houses elsewhere in the country this should be no great surprise.
2. The increase was broadly an amplification of existing trends, both in terms of the demographics leaving and their destinations. London has for many years lost population to the rest of England and Wales, with the difference between births and deaths and international migration driving the growth of the Capital's population.
3. There doesn't seem to have been a permanent change. The reversal of pandemic changes across London in the most recent internal migration data, and the average private rent data since, suggests that the appeal of quitting London diminished as it reopened, pandemic restrictions eased, and professionals were required to spend at least part of the week in the office. The question now is whether in the coming years population growth will 'overshoot' to compensate for the increased outflows during the pandemic.

If this is to be a short-term blip rather than a longer-term change in the trajectory of London's population then this has important implications for investment in the Capital. The above rental price data underlines the relationship between supply and demand in determining housing costs, and ultimately, the pandemic has not changed either. London's population is set to continue to rise, and the rate of building must increase if housing affordability is to be moderated in the coming years.

London's return to the norm will also mean that future investment in the transport system and other civil infrastructure will be necessary. History shows that projects like Crossrail II and the Bakerloo Line extension will take many years to be agreed and delivered. Misguided understandings of the impact of the pandemic on the Capital should not add further delays to the timelines of delivering such investments, as this will only compound the existing problems that London faces.

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