

Migration

Summary points

- Bristol is the largest city in the South West and the 8th largest of the 12 UK 'Core Cities'. The mid-2025 population of Bristol is estimated to be 495,300. The population is currently projected to increase to 526,600 people by 2032 – a 10% increase between 2022-32 (England 6.4%) and the 2nd highest % increase of the Core Cities in England.
- Looking back over the last decade (2015-2025) Bristol's population grew by an estimated 43,500 people, a 9.6% increase (England and Wales grew by 7.1%). This is the 3rd largest percentage population increase of the nine Core Cities in England and Wales.
- From 2021-2024, the main factor behind population growth had been net international migration, as this had increased to levels higher than seen in over two decades. However, this has changed. In the year to mid-2025 population growth was significantly less, and the main factor was a fall in net international migration, mainly from outside the EU.
- The majority of immigration is now from outside the EU, including international students and workers, mainly from India, China, Nigeria, Pakistan and Ukraine. The latest estimates however show a significant slowing of these trends due to recent changes to government policies.
- For the last five years, more people have moved out of Bristol to surrounding areas and other parts of the UK than moved into Bristol from surrounding areas and other parts of the UK. Although there have been net gains in the student age groups.

Components of population change

Annual population change is driven by births, deaths and migration. Collectively, these are referred to as 'components of change'.

National context

The number of people immigrating to England and Wales from outside the UK decreased in the year to mid-2025, compared with the three previous years. The number of people emigrating from England and Wales to outside the UK also increased in the same period. This led to an overall decrease in net international migration compared with the previous year.

Although estimated net international migration was lower in the year to mid-2025 compared with the previous year, it continued to contribute the most to population growth.

The most recent ONS analysis shows that at the UK level, long-term international net migration for year ending December 2025 has nearly halved from year ending December 2024. The

number of nationals from outside the EU arriving for work-related reasons fell by 47% in 2025, which was the main reason for the continued fall in net migration; in the same period, overall emigration fell slightly. Net migration for EU nationals in the year ending December 2025 was negative, with more people leaving the UK than arriving.

Net migration to the UK since 2021 had been running at record levels, driven by a rise in people coming for work, increasing numbers of students and world events.

Before the pandemic, migration was relatively stable, but patterns and behaviours have shifted considerably since then. ONS estimates show a marked change in immigration since 2021 because of a rise in immigration from countries outside of the EU driven by a range of factors including:

- free movement ending for EU nationals in January 2021 as part of the introduction of the new immigration system
- the easing of travel restrictions in July 2021 following the coronavirus pandemic
- world events including the war in Ukraine and British National (Overseas) scheme

The places people are coming from have changed. Instead of migration to the UK being driven by arrivals from the European Union, as was the case up until 2019, people are now coming from further afield, especially China, India and Nigeria.

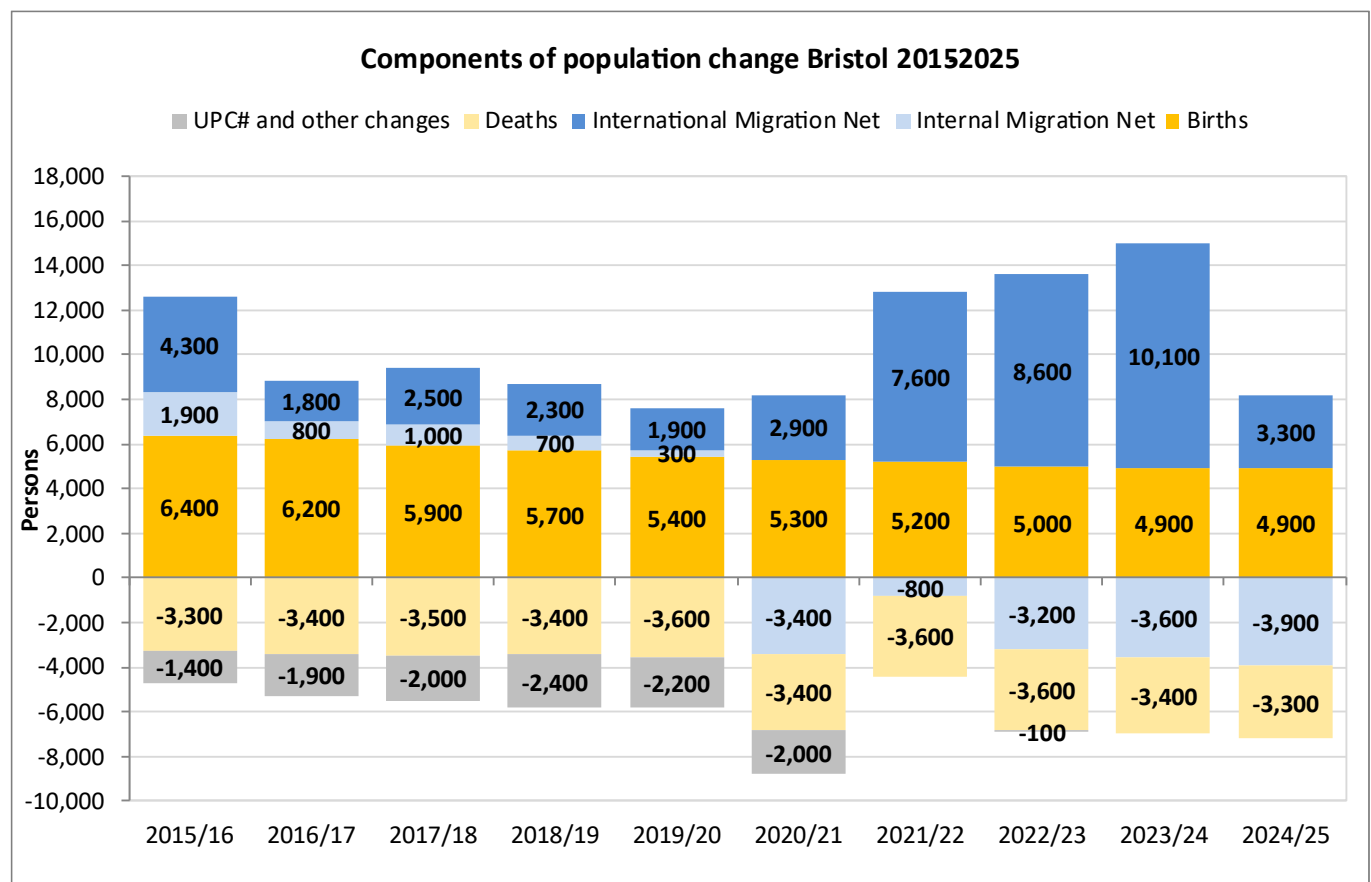


Figure 1 Components of population change in Bristol 2015-2025

Source: ONS Population Estimates. ONS licensed under the Open Government Licence.

Migration into and out of Bristol

International migration

From 2021-2024, the main factor behind population growth had been net international migration, as net international migration had increased to levels higher than seen in over two decades. However, this has changed. In the year to mid-2025 population growth was significantly less (Figure 1).

The number of people immigrating to Bristol from outside the UK decreased in the year to mid-2025 and the number of people emigrating from Bristol to outside the UK also increased in the same period. This led to an overall decrease in net international migration compared with the previous year.

In the 12 months to mid-2025, there were 11,700 international in-migrants and 8,300 international out-migrants, a net gain of 3,300 people. Similarly to internal migration, the majority of the change can be seen in people aged 18-23 years, with this age group accounting for 84% of the overall net gain due to international migration, many of these will be students.

As seen nationally, there has been a marked change in immigration in Bristol since 2021 (Figure 2). Until 2019 EU nationals were the larger component of total immigration, whereas since 2021 the majority of immigration is now nationals from countries outside of the EU, including both international students and workers. A fall in migration from countries outside of the EU is driving the decrease in total net migration.

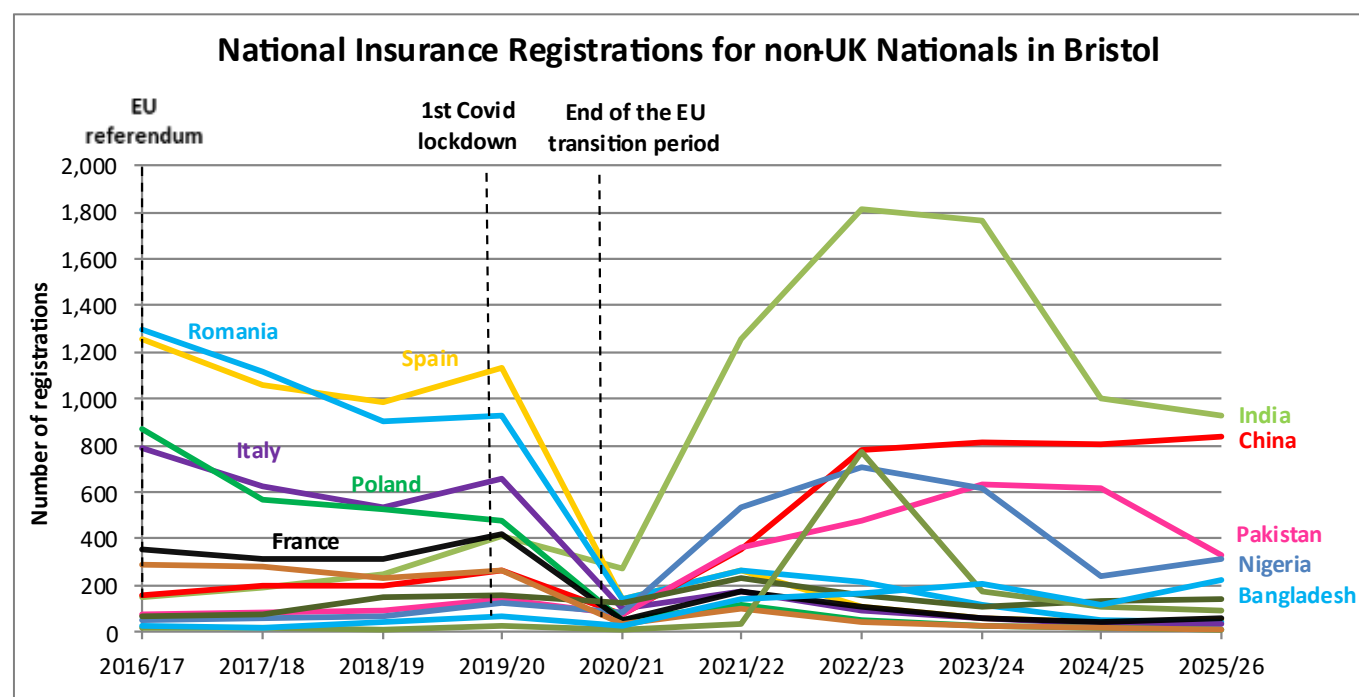


Figure 2 National Insurance Registrations for non-UK Nationals in Bristol

Countries with a total of 1,000 or more NI registrations since 2016/17

Source: Stat-Xplore, Department for Work and Pensions <https://stat-xplore.dwp.gov.uk/>.

Notably, Bristol has seen a significant rise in the number of in-migrants particularly from India but also China, Nigeria, Pakistan and Ukraine. The most recent National Insurance Statistics for 2024/25 however, show that the number of National Insurance Registrations by people from India and Nigeria fell sharply in the 12-month period up to March 2025.

Internal migration

Since 2011, both the number of people moving out of Bristol to surrounding areas and other parts of the UK and the number of people moving into Bristol from surrounding areas and other parts of the UK have almost doubled resulting in an increasingly transient population.

The long-term trend of little net change annually due to internal migration has changed in the last five years, with more people now moving out of Bristol than moving into Bristol from surrounding areas and other parts of the UK. The 12 months to mid-2025 saw a net loss of 3,900 people to others areas (Figure 3).

In the 12 months to mid-2025, all age groups saw a net loss of people except 18-21 year olds. There was an estimated 11,900 in-migrants aged 18-21 years from other parts of the UK and 3,200 out-migrants resulting in a net gain of 6,700 18-21 year olds. The largest losses due to net internal migration were 22 year olds as people leave university and in the 30-39 year age group as well as young children, suggesting that people with young families are moving out of the Bristol local authority area.

It is important to note that the flows of people moving in and out of Bristol to surrounding areas and to other parts of the UK are considerably greater than the numbers of international migrants moving into and out of Bristol. In the 12 months to mid-2025, 42,500 people moved into Bristol from other areas of UK whilst 46,300 moved out of Bristol to other areas of UK. In contrast, 11,700 people moved into Bristol from outside the UK and 8,300 people moved out of Bristol to go abroad.

Further data / links:

The Population of Bristol report <http://www.bristol.gov.uk/population>

Population-related JSNA Profiles include:

1. JSNA - Population Profile
2. JSNA – Population Projections
3. JSNA - Births

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Contact details: research@bristol.gov.uk