

Migration since the Brexit vote: Autumn 2018 Update

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We welcome your comments and feedback.

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Why measure migration?

One of the main risks associated with Brexit is the discontinuity of access to the European labour market, and any sentiment against coming to Britain to work. This is of particular importance to Perth & Kinross.

Seasonal workers are a crucial component of the business model for agricultural, food and drink, hospitality and tourism sectors which are key components of the economy in Perth & Kinross. These sectors have grown a significant degree of dependence on ongoing access to the EU labour market. Currently, migration from the EU spikes in high season (July – September) to the level of 4.5 times the average of out of season migration, reflecting seasonal demand.

Depending on sector, EU workers currently make up between 4% and 30% of total workforce in the UK. In Scotland, this increases to 60% in specific sub-sectors like meat processing, and to over 90% for seasonal workforce in horticulture.

Summary of local key points

- Perth & Kinross has a higher proportion of EU migration than Scotland as a whole. What follows, any impact related to EU migration will be more significant locally in Perth & Kinross.
- Migration from EU countries spikes in the summer months when compared with the rest of the year. This correlates to high season in the agricultural / food and drink sector and seasonal labour requirement.
- There has been an **18.9% decline in immigration** to Perth & Kinross area from EU countries, and a drop of 18.2% in immigration from all countries.
- After an upturn in applications for UK citizenship locally in 2016, the level remained almost unchanged in 2017. This is still below the period of 2009-2013.

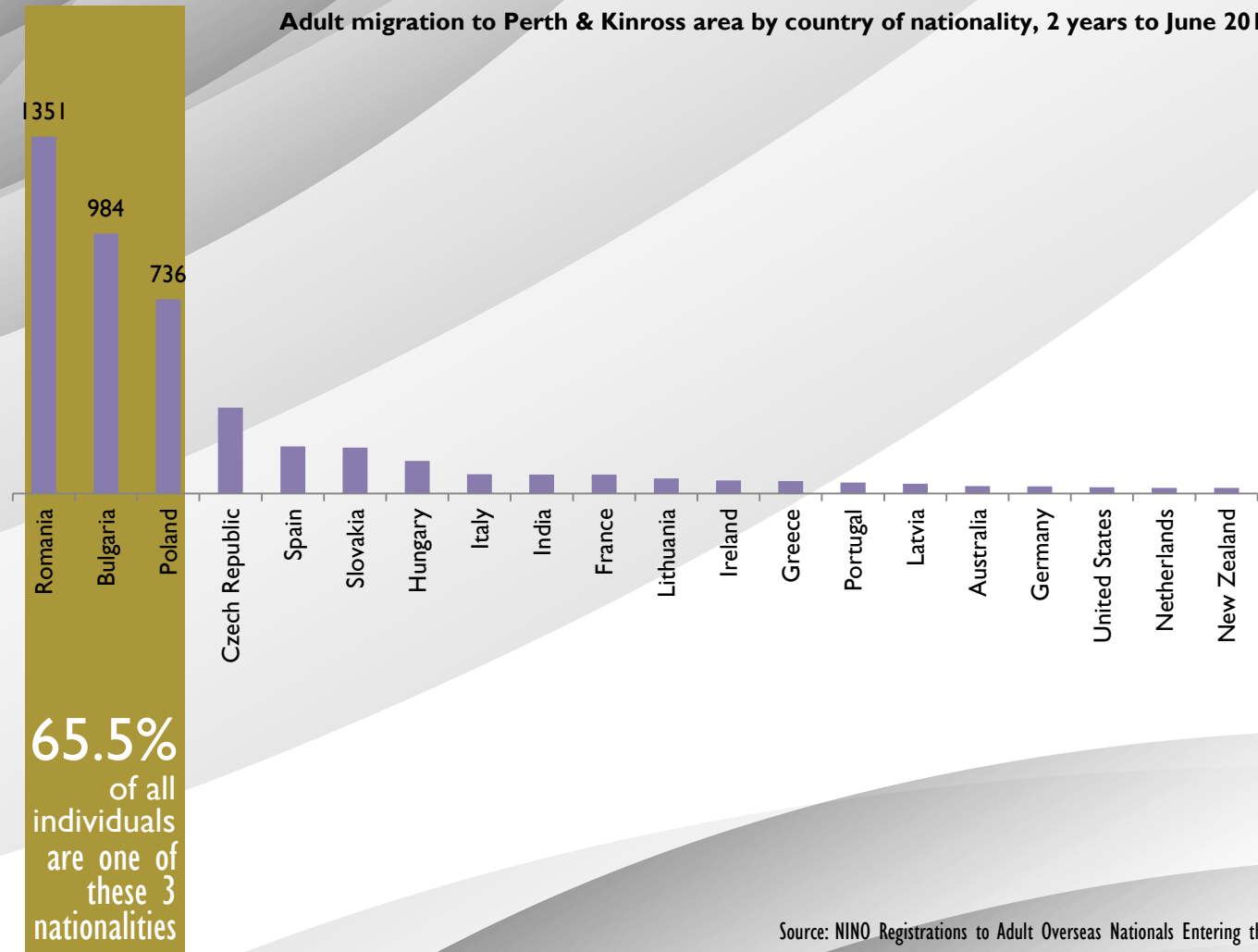
Local non-UK born population stocks

According to the National Records of Scotland, an estimated 12,000 non-UK born individuals currently live in Perth & Kinross area (8% of the total population). Around 8,000 (66.7%) of these individuals were born in the EU. This is a higher proportion than the Scottish average of 50.1%.

briefing

Inflows of labour migration

Adult labour migration to Perth & Kinross area¹ is hugely dominated by EU citizens. 65.5% of all new immigrant workers in the area are one of just 3 nationalities – Romanian, Bulgarian or Polish. 9 out of top 10 countries of origin are EU countries.



Source: NINO Registrations to Adult Overseas Nationals Entering the UK

briefing

Source of inward migration

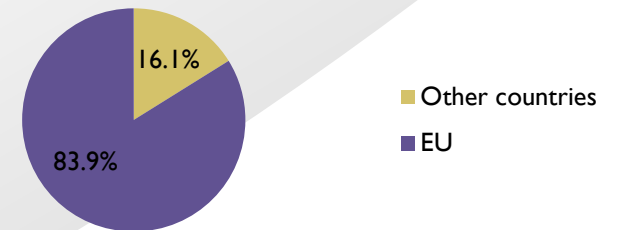
Labour migration from EU countries contributes a higher proportion to the overall migration in agricultural high season.

A similar trend is observed in the wider Tay Cities Dealⁱⁱ area, although the proportion itself is slightly lower.

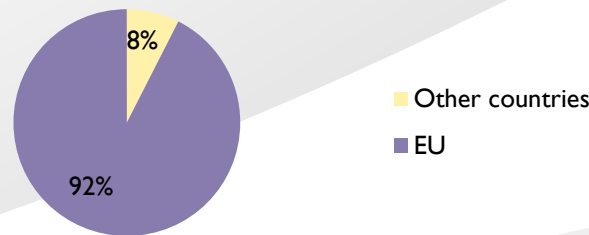
High Season in Perth & Kinross



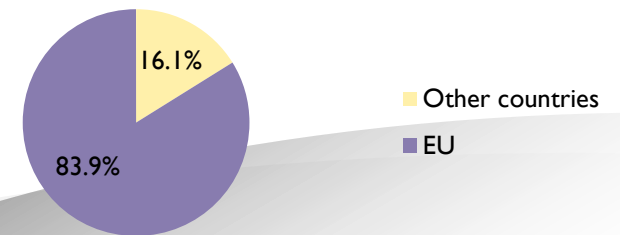
Low Season in Perth & Kinross



High Season in TCD Area

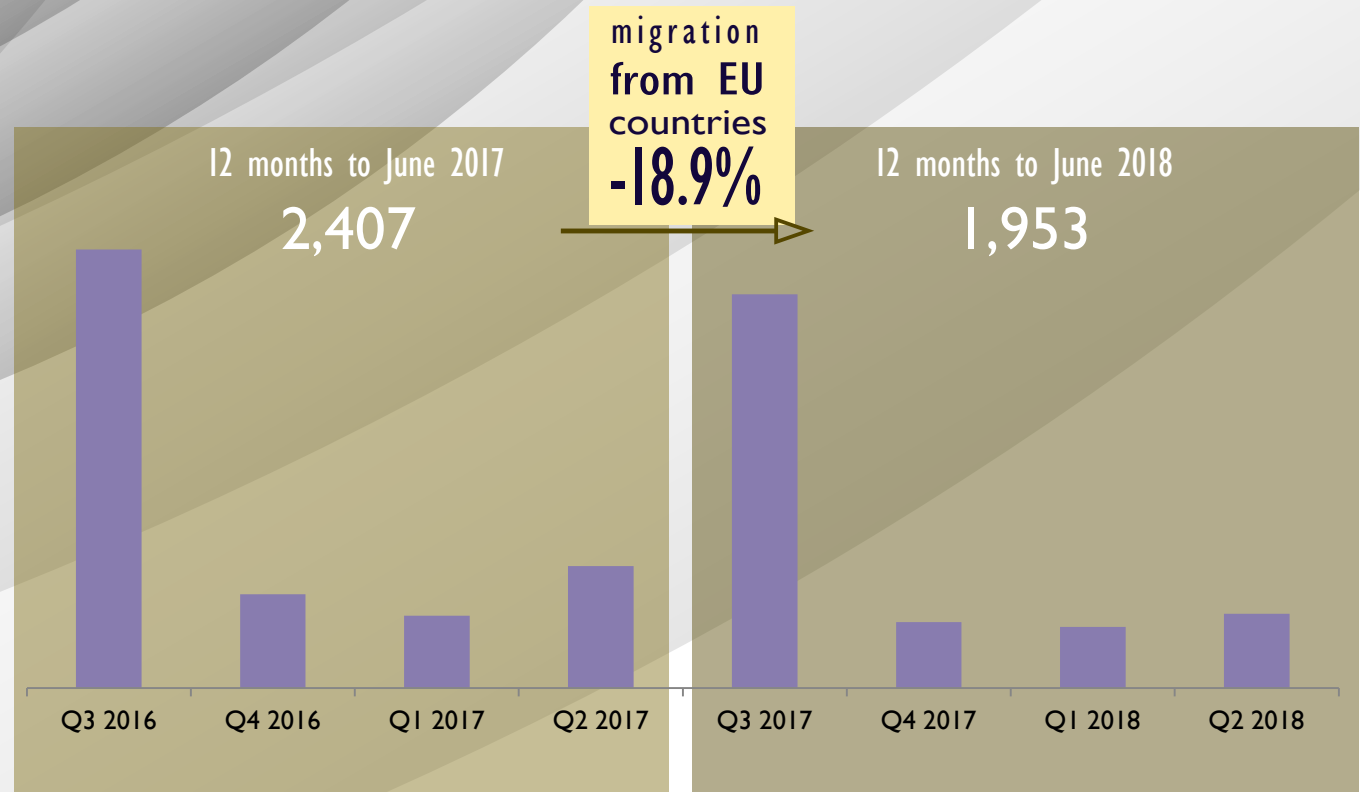


Low Season in TCD Area



briefing

There was a drop of 18.9% in migration from EU countries to Perth & Kinross in the 12 months to June 2018.



Total migration figures, including both from EU countries and from non-EU countries, was down by 18.2%.

briefing

Outflows of migration

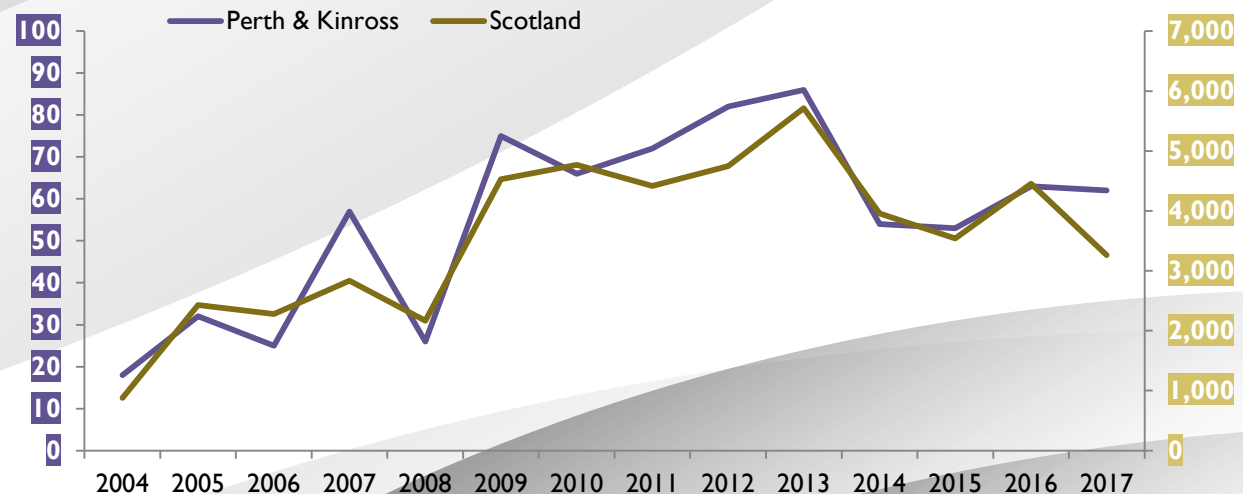
Unfortunately, we are not able to trace outflows, or emigration/return migration from Perth & Kinross or Tay Cities Deal area to EU or any other countries.

UK Citizenship applications

So far, we saw an upturn in 2016 both in Perth & Kinross and in Scotland, although the years 2009-2013 were on a higher level in both geographies.

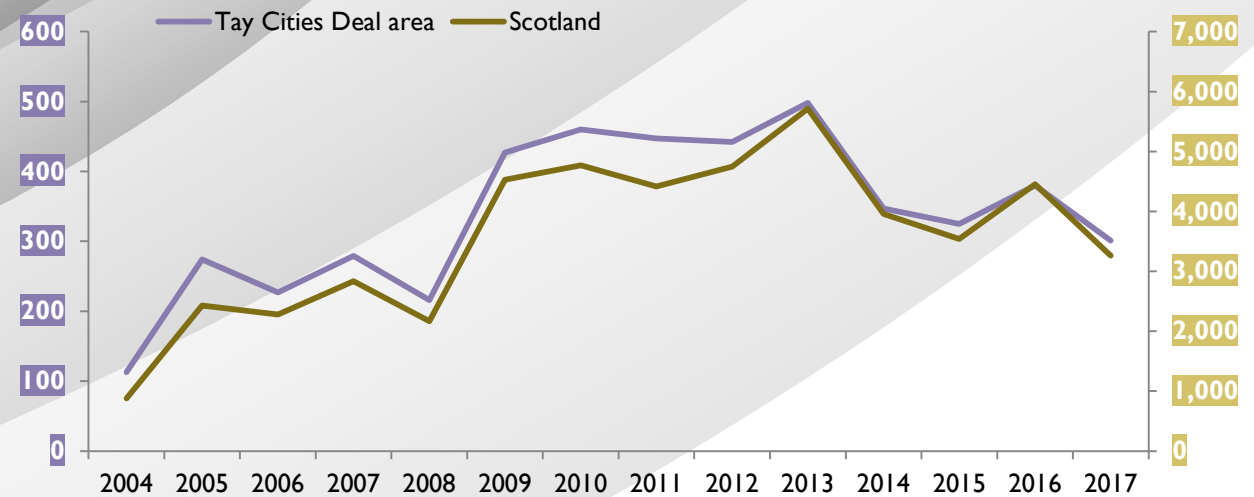
2017 brought a marginal drop-off on the local level, and a larger drop across Scotland. We do not know how much of this upturn so far is applicable to EU citizens applying for UK citizenship.

In the graph on the right, Perth & Kinross is plotted against the left-hand side vertical axis and Scotland, the right-hand one.



briefing

Tay Cities Deal area saw a drop in 2017 of a similar magnitude to Scotland. Overall, the area follows the Scottish trend more closely than Perth & Kinross does over the years.



ⁱ Immigration is mapped using the numbers of registrations to foreign individuals for a National Insurance Number as proxy.

ⁱⁱ Tay Cities Deal area, also referred to as TCD, includes Angus, Dundee City Council, Perth & Kinross and North-East Fife. However, for technical reasons, in the current publication this also includes all of Fife council area.