Migration since the Brexit vote: Summer 2019 Update

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We welcome your comments and feedback.

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 a **12% decline in overall immigration** to Perth & Kinross area year-on-year, and **a drop of 14.4% in immi-**

gration from EU countries.

• Perth & Kinross figures are **4th highest in Scotland**.

• Since the referendum year the decline in migration figures deepened **further than in the aftermath of the 2009 recession**.

• 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.

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.
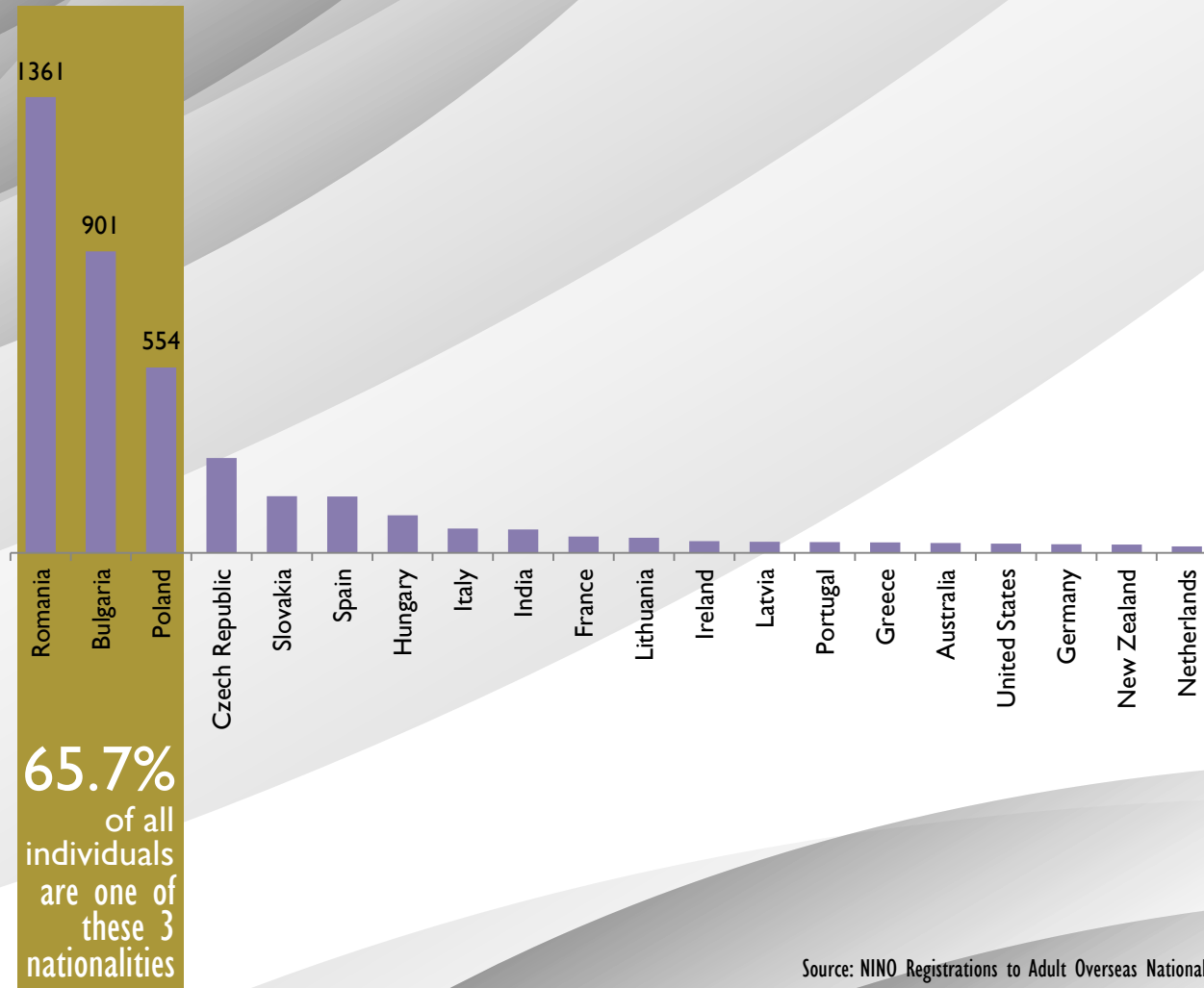
Local non-UK born population stocks

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%.

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Inflows of labour migration

Adult labour migration to Perth & Kinross area[i] is hugely dominated by EU citizens. 65.7% 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.

1361 Romania
901 Bulgaria
554 Poland
Czech Republic
Slovakia
Spain
Hungary
Italy
India
France
Lithuania
Ireland
Latvia
Portugal
Greece
Australia
United States
Germany
New Zealand
Netherlands

65.7%
of all individuals are one of these 3 nationalities

Source: NINO Registrations to Adult Overseas Nationals Entering the UK

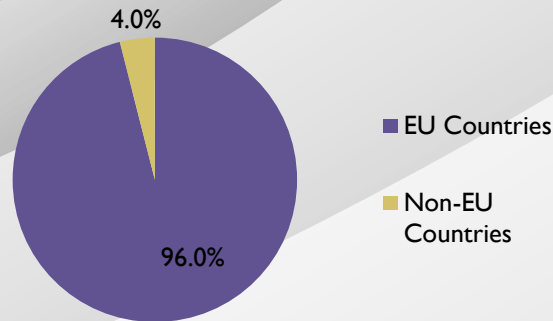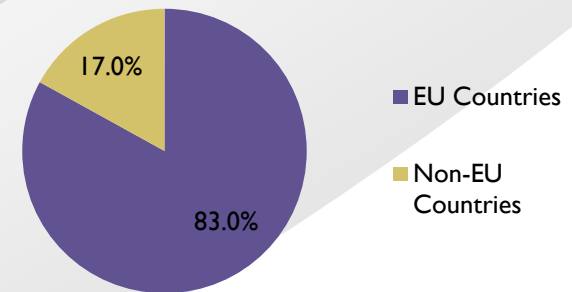## Source of inward migration

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 Deal[ii] area, although the proportion itself is noticeably lower. What follows, Perth & Kinross area is more exposed to restriction to movement of people from the EU.
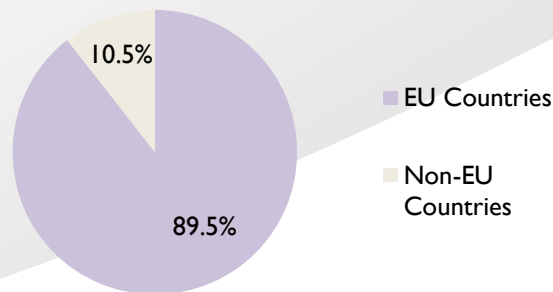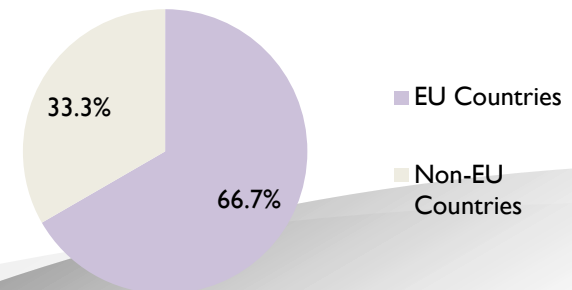
High Season in Perth & Kinross

4.0%
96.0%

- EU Countries
- Non-EU Countries

Low Season in Perth & Kinross

17.0%
83.0%

- EU Countries
- Non-EU Countries

High Season in TCD Area

10.5%
89.5%

- EU Countries
- Non-EU Countries

Low Season in TCD Area

33.3%
66.7%

- EU Countries
- Non-EU Countries

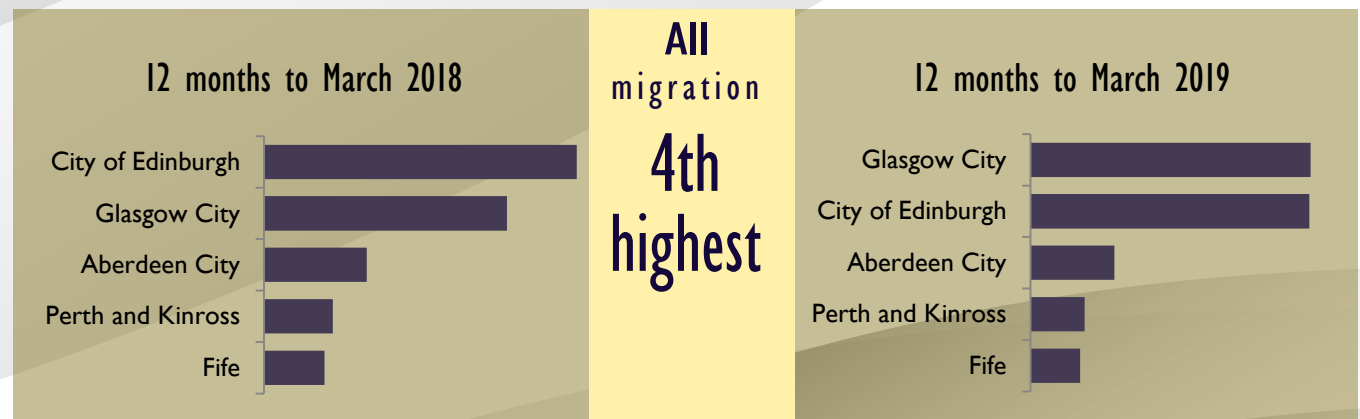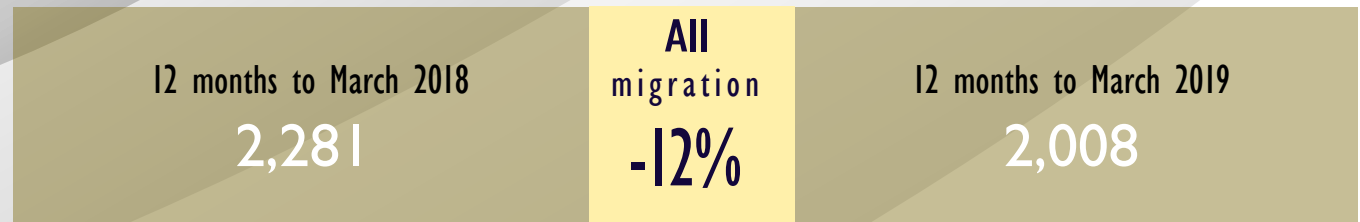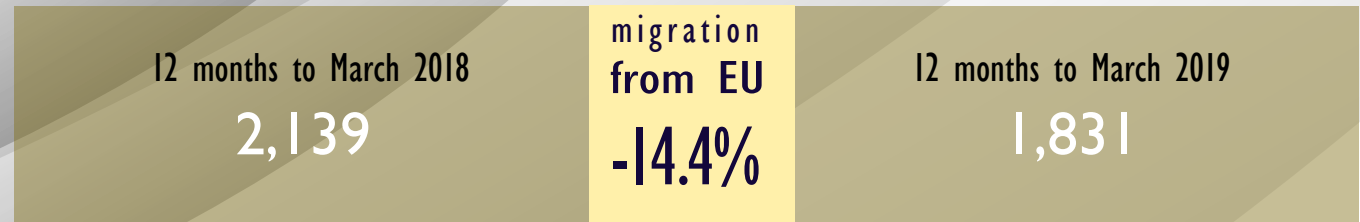*Source: NINO Registrations to Adult Overseas Nationals Entering the UK*

There was a drop of 14.4% in migration from EU countries to Perth & Kinross in the 12 months to March 2019.

12 months to March 2018	migration from EU	12 months to March 2019
2,139	**-14.4%**	1,831

Total migration figures, including both from EU countries and from non-EU countries, was down by 12%.

12 months to March 2018	All migration	12 months to March 2019
2,281	**-12%**	2,008

Perth & Kinross numbers have consistently been 4th highest in Scotland.

All migration

4th highest

12 months to March 2018

- City of Edinburgh
- Glasgow City
- Aberdeen City
- Perth and Kinross
- Fife

12 months to March 2019

- Glasgow City
- City of Edinburgh
- Aberdeen City
- Perth and Kinross
- Fife

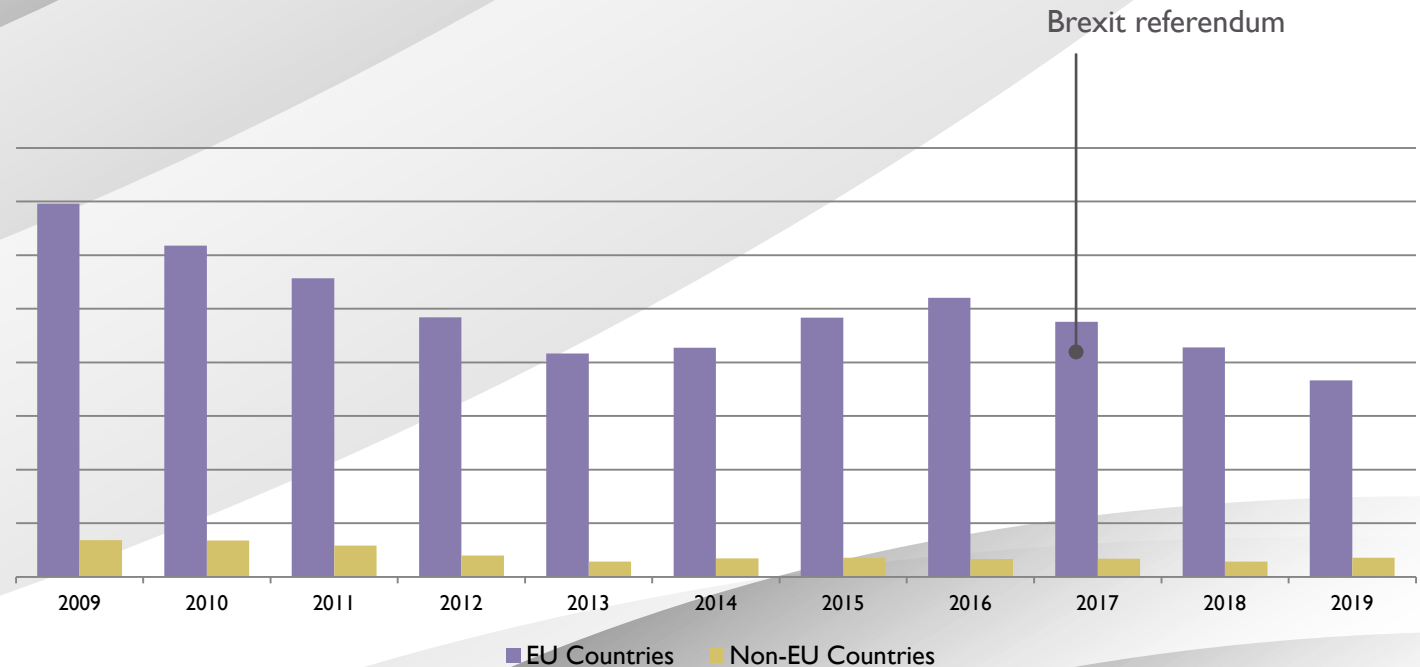Source: NINO Registrations To Adult Overseas Nationals Entering The UK

Long-term trend

The graph attempts to illustrate the effects on labour migration in Perth & Kinross of the two most significant economic and political events in the UK in recent years, namely: the recession of 2009 and Brexit referendum of 2016.

The figures show a consistent pattern of decline following the economic recession of 2009, followed by a 3-year period of recovery.

However, since the referendum year the effects of this recovery have been reversed and in fact the decline deepened further than in the aftermath of the recession.
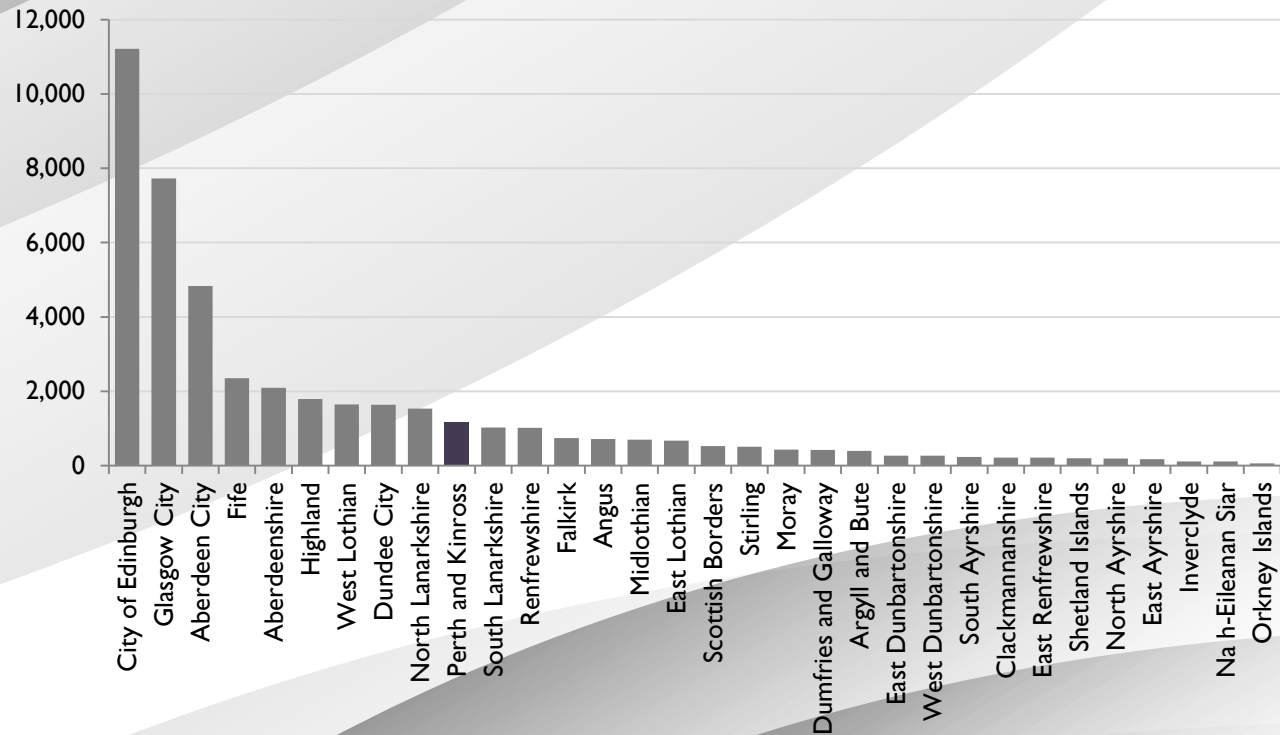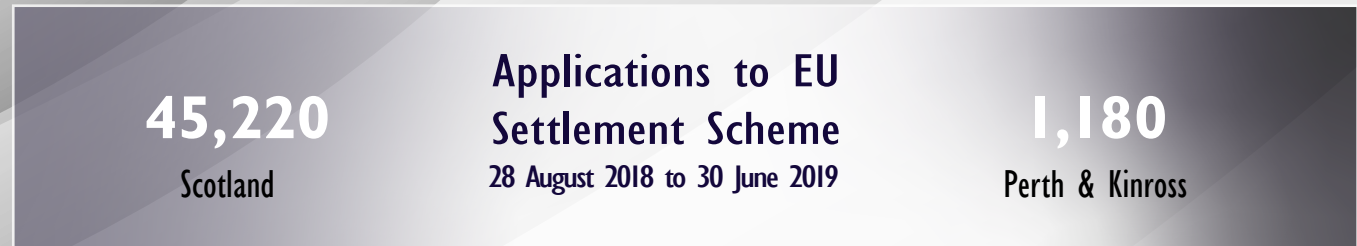
Each bar represents numbers for a period of 12 months ending in March of the given year.

Brexit referendum

2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019

■ EU Countries   ■ Non-EU Countries

EU Settlement Scheme applications

The EU Settlement Scheme (EUSS) allows EU, EEA or Swiss nationals, and their family members, to apply for UK immigration status for when the UK leaves the European Union. It allows those who are resident in the UK to obtain settled status or pre-settled status.

The figures reflect the number of applications made thus far, not the outcome of application.

45,220 Scotland	Applications to EU Settlement Scheme 28 August 2018 to 30 June 2019	**1,180** Perth & Kinross

Bar chart of Applications to EU Settlement Scheme by area: City of Edinburgh, Glasgow City, Aberdeen City, Fife, Aberdeenshire, Highland, West Lothian, Dundee City, North Lanarkshire, Perth and Kinross, South Lanarkshire, Renfrewshire, Falkirk, Angus, Midlothian, East Lothian, Scottish Borders, Stirling, Moray, Dumfries and Galloway, Argyll and Bute, East Dunbartonshire, West Dunbartonshire, South Ayrshire, Clackmannanshire, East Renfrewshire, Shetland Islands, North Ayrshire, East Ayrshire, Inverclyde, Na h-Eileanan Siar, Orkney Islands.
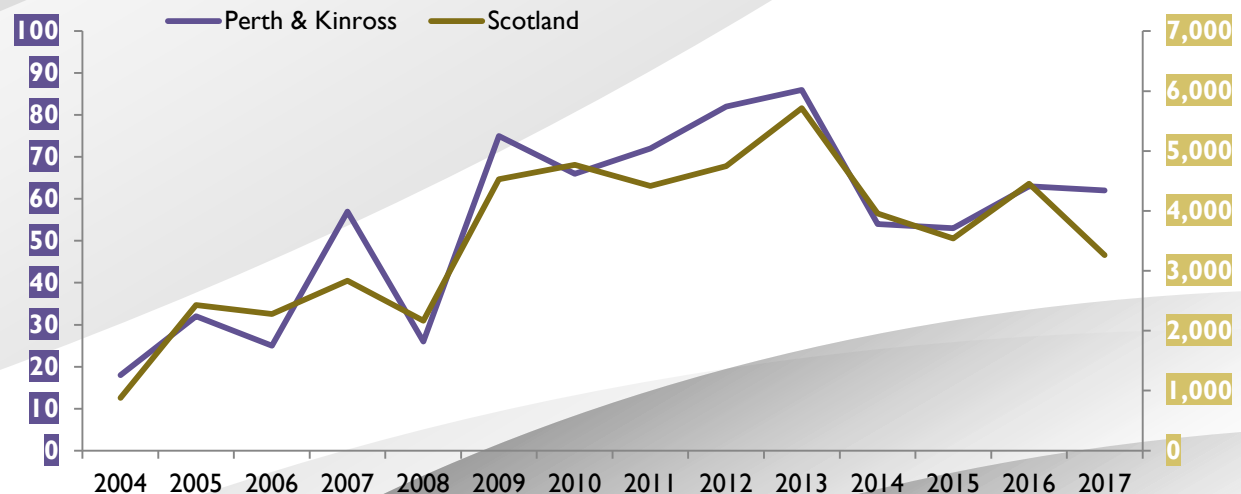
Outflows of migration

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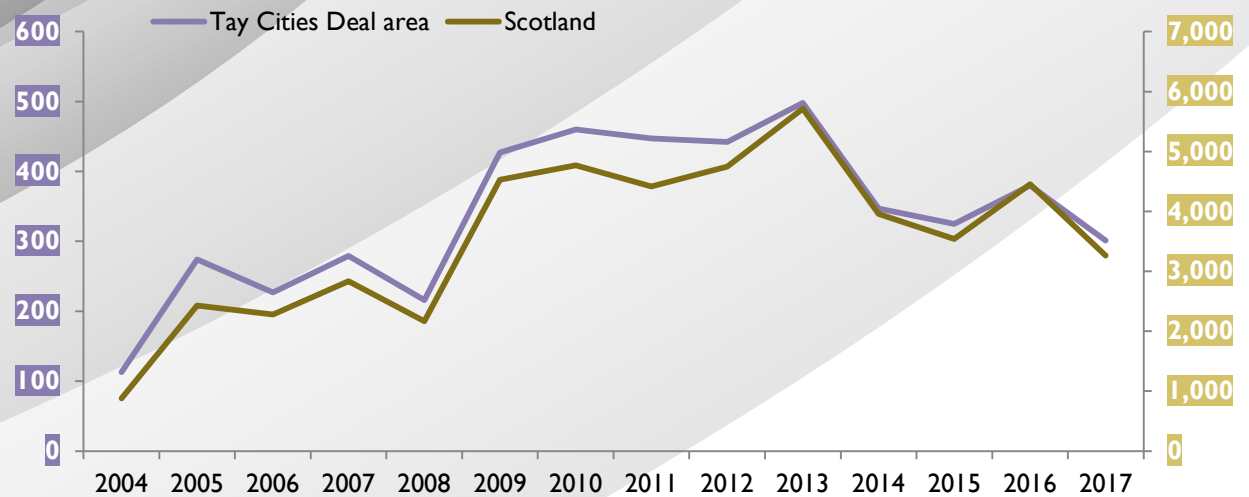
2017 brought a marginal drop-off on the local level, and a larger drop across Scotland. We do not know how much of this upturn so far is applicable to EU citizens applying for UK citizenship.

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

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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.