



Public Policy Institute for Wales
Sefydliad Polisi Cyhoeddus i Gymru

PPIW Evidence Summary on EU Migration Prepared for the European Advisory Group

November 2016

Summary

- The First Minister has asked the Public Policy Institute for Wales to provide analytical support to the European Advisory Group (EAG). The Institute's work will complement analyses conducted by Welsh Government officials and others.
- This note has been prepared to help inform discussion at the EAG's meeting on 28th November. It draws together existing evidence on four issues: the scale of EU migration to Wales; EU migration from Wales; the demographics and labour market characteristics of EU migrants living in Wales; and public attitudes to EU migrants in Wales.
- There is scope for further analysis to fill some of the gaps in the existing evidence base. This could be prepared in time for the EAG's next meeting early in 2017.

The scale of EU migration in Wales

- The proportion of those living in Wales who are EU migrants is low compared to the UK average.
- In the last decade the proportion of EU migrants has increased but more slowly than the UK average.
- More than half of EU migrants in Wales are concentrated in six local authority areas – Cardiff, Newport, Carmarthenshire, Swansea, Flintshire and Wrexham.
- The distribution of and the increase in EU migrants in Wales has been uneven. Some areas, for example Merthyr Tydfil, have seen large percentage increases, albeit from a low base.

Migrant workers

- Most long term EU migrants come to Wales to work. More than half report that they already had a job to go to on arrival.
- Working age EU migrants in Wales are more likely to be in work than the rest of the population. On average, migrant workers in Wales earn slightly less than those born in the UK and are more likely to be employed in elementary occupations (performing simple and routine tasks that often require physical effort).
- There are more than three times as many EU migrants as non-EU migrants in manufacturing, while for public administration, education and health, there are more than twice as many non-EU migrants as EU migrants.

Public attitudes

- Recent survey data suggest that people in Wales are less sympathetic to EU migrants than people in other parts of the UK.
- Almost three quarters consider EU migrant workers to be a net cost, and people in Wales are more likely than those in other parts of the UK to believe that immigration should be reduced.
- The existing data do not show a strong correlation between the scale of inward migration into an area and the size of the vote in favour of leaving the EU.

Policy implications

- The relatively low level of migration from the EU to Wales suggests that restrictions on free movement of people may have less impact in broad aggregate terms than in other parts of the UK.
- The uneven distribution of EU migrants living in Wales means that the size of the impact of restrictions on free movement could vary between communities, or spatially concentrated industries and services.
- The overall figures may also mask the vulnerability of some public services and economic sectors to restrictions on free movement. Analysis shows that tourism and manufacturing might be more susceptible than other sectors. It has also been suggested that the Welsh NHS could be vulnerable to restrictions on the number of EEA healthcare professionals working in the UK (Zolle, 2016).
- Restrictions on free movement may not address the underlying causes of dissatisfaction in communities where large majorities voted in favour of leaving the EU.

Further analysis

- This report is based on a rapid review of the available secondary data.
- The initial conclusions that we have presented could, and we believe should, be tested through more in depth analysis of administrative data which would provide a better understanding of recent migrant flows and the role that EU migrants currently play in Wales.
- This analysis could also help to identify areas and sectors where restrictions on free movement are likely to have the biggest impacts and explore the impact of different scenarios in terms of restrictions on free movement of people.

Introduction

The First Minister has asked the Public Policy Institute for Wales (PPIW) to provide analytical support to the European Advisory Group (EAG). The Institute's work will complement analyses conducted by Welsh Government officials and others.

One of the themes currently being considered by the European Advisory Group (EAG) is the implications for Wales of any changes to the freedom of movement of people as a result of the UK leaving the European Union. This note has been prepared to help inform discussion of these issues at the EAG's meeting on 28th November. It draws together existing evidence about:

- The scale of EU migration to Wales;
- EU migration from Wales;
- The demographics and labour market characteristics of EU migrants; and
- Public attitudes to EU migrants in Wales.

There is scope for further analysis to fill some of the gaps in the existing evidence base and this could be prepared in time for the EAG's next meeting early in 2017.



Migration to Wales

Non-UK born residents in Wales

A lower proportion of people living in Wales are migrants than is the case in the UK as a whole. In Wales 2.6% of the population are EU migrants and 3.2% are non-EU migrants compared to the UK average of 5.2% EU migrants and 8.5% non-EU migrants (Table 1).

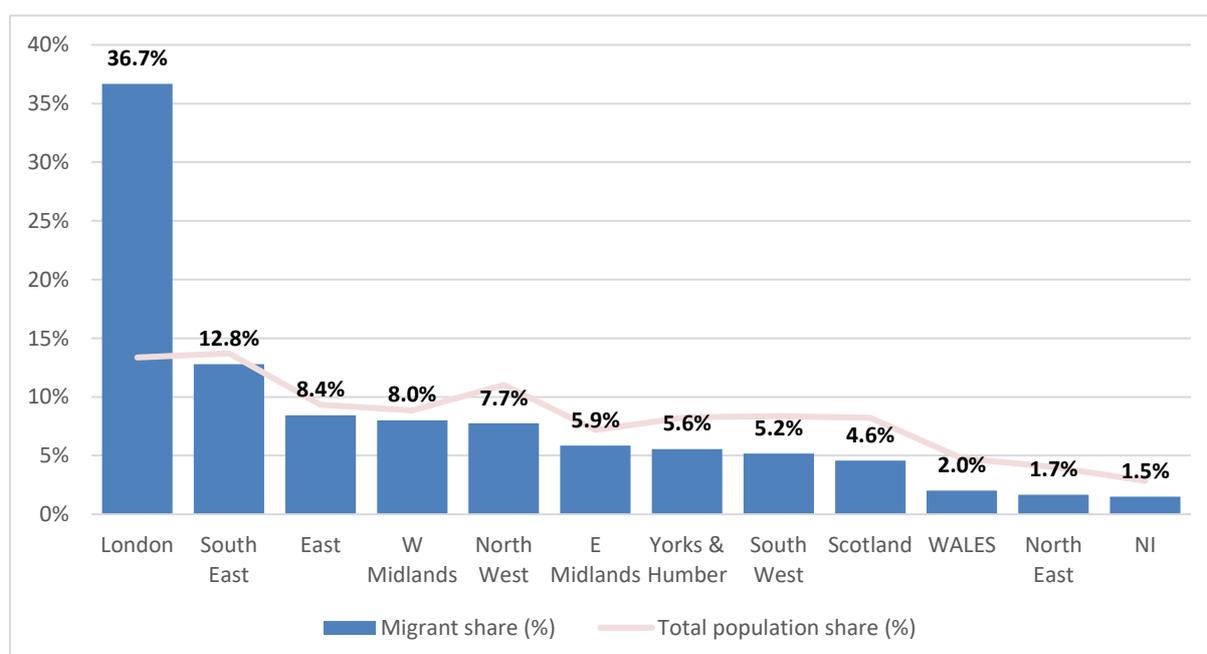
Table 1: Scale of EU and non-EU migration into Wales and UK (based on country of birth)

	Wales		UK	
	Number	% of population	Number	% of population
EU migrants	79,100	2.6%	3,379,500	5.2%
Non-EU migrants	97,500	3.2%	5,467,000	8.5%
Total migrant population	176,600	5.8%	8,846,500	13.7%

Source: StatsWales (June 2016) based on data from Labour Force and Annual Population surveys.

Wales is home to 4.8% of the total UK population but just 2% of the UK migrant population. This means that it has a smaller share than almost any other part of the UK (Figure 1).

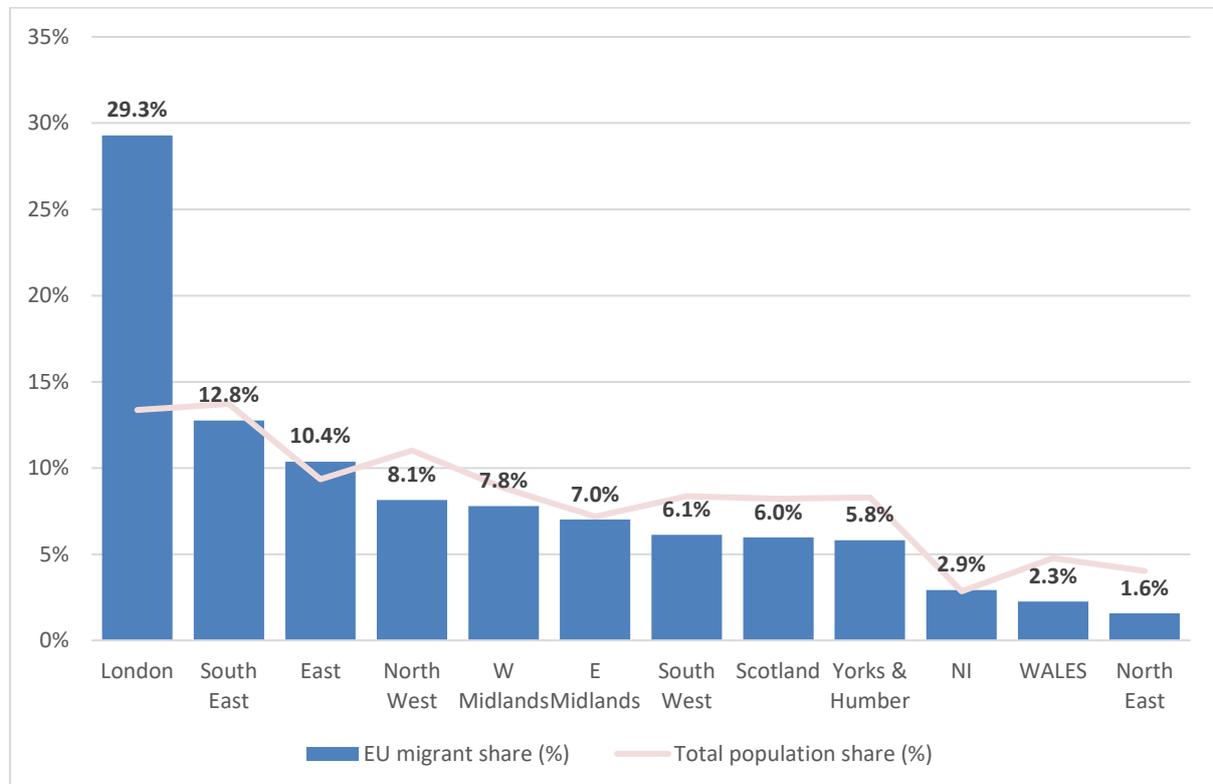
Figure 1: Where do people born abroad live in the UK? (2015)



Source: ONS (December 2015) based on data from Labour Force and Annual Population surveys.

Wales has 2.3% of the total EU migrant population living in the UK, which is smaller than any other part of the UK except for North East England (Figure 2).

Figure 2: Where do EU migrants live in the UK? (2015)



Source: ONS (December 2015) based on data from Labour Force and Annual Population surveys.

Non-UK born residents by local authority area

Six local authority areas account for 61.4% of all non-UK born people living in Wales. Almost a quarter live in Cardiff. Other areas with the largest numbers of non-UK born residents are Swansea, Newport, Carmarthenshire, Wrexham and Flintshire (Table 2).

There are wide variations between areas. Non-UK born residents make up just 2% of the population of Rhondda Cynon Taf and Neath Port Talbot but more than 10% in Cardiff and Newport.

Table 2: Residents in local authorities in Wales born outside the UK (ranked in descending order by percentage of population)

	Total	% of all non-UK born residents in Wales	% of local population
Cardiff	41,100	23.3%	11.6%
Newport	15,300	8.7%	10.5%
Swansea	21,800	12.3%	9.1%
Carmarthenshire	13,300	7.5%	7.3%
Ceredigion	4,900	2.8%	6.6%
Wrexham	8,600	4.9%	6.3%
Flintshire	8,400	4.8%	5.5%
Vale of Glamorgan	6,500	3.7%	5.2%
Conwy	5,600	3.2%	4.9%
Gwynedd	5,800	3.3%	4.8%
Torfaen	4,100	2.3%	4.5%
Monmouthshire	4,100	2.3%	4.5%
Pembrokeshire	5,100	2.9%	4.1%
Denbighshire	3,800	2.2%	4.1%
Anglesey	2,700	1.5%	3.9%
Powys	5,000	2.8%	3.8%
Merthyr Tydfil *	2,100	1.2%	3.6%
Bridgend *	3,900	2.2%	2.8%
Blaenau Gwent *	1,900	1.1%	2.8%
Caerphilly	4,900	2.8%	2.7%
Neath Port Talbot *	2,900	1.6%	2.1%
Rhondda Cynon Taf *	4,800	2.7%	2.0%

Source: StatsWales (June 2016) based on data from Labour Force and Annual Population surveys.

* Based on small sample sizes (between 25 and 40 responses).

EU migrants by local authority area

The pattern of EU migration is slightly different to that for non-UK born residents as a whole. However, the same six local authorities have the largest numbers of EU migrants and account for more than half of all EU migrants in Wales.

The variation between areas is smaller than is the case for non-UK born residents. EU migrants constitute around 1% of the population of Torfaen compared to 5.4% in Newport (Table 3).

Table 3: EU migrants living in local authorities in Wales (ranked in descending order by percentage of population)

	Number	% of all EU migrants in Wales	% of local authority population
Newport	7,900	10.0%	5.4%
Carmarthenshire	7,600	9.6%	4.2%
Wrexham	5,300	6.7%	3.9%
Flintshire	5,500	7.0%	3.6%
Cardiff	11,800	14.9%	3.3%
Ceredigion	2,400	3.0%	3.3%
Swansea	6,400	8.1%	2.7%
Pembrokeshire	3,300	4.2%	2.6%
Anglesey *	1,700	2.1%	2.4%
Monmouthshire *	2,200	2.8%	2.4%
Vale of Glamorgan *	3,000	3.8%	2.4%
Conwy	2,700	3.4%	2.4%
Denbighshire *	2,000	2.5%	2.1%
Powys *	2,500	3.2%	1.9%
Bridgend *	2,500	3.2%	1.8%
Blaenau Gwent **	1,200	1.5%	1.7%
Caerphilly *	3,100	3.9%	1.7%
Merthyr Tydfil **	1,000	1.3%	1.7%
Gwynedd **	1,500	1.9%	1.2%
Rhondda Cynon Taf **	2,900	3.7%	1.2%
Neath Port Talbot **	1,500	1.9%	1.1%
Torfaen **	900	1.1%	1.0%

Source: StatsWales (June 2016) based on data from Labour Force and Annual Population surveys.

* Limited quality: based on between approximately 25 and 40 responses.

** Low quality: based on between approximately 10 and 25 responses.

There is a wide variation across Wales in the proportion of non-UK born residents who are EU migrants. Less than a third of non-UK born residents in Cardiff and Swansea are EU migrants compared with almost two thirds of non-UK born residents in Flintshire and Pembrokeshire (Table 4).

Table 4: EU migrants as a proportion of non-UK born residents in local authorities in Wales (ranked in descending order by percentage of population)

	Non-UK born residents (N)	EU migrants (N)	% of non-UK born residents who are EU migrants
Flintshire	8,400	5,500	65.5%
Pembrokeshire	5,100	3,300	64.7%
Bridgend *	3,900	2,500	64.1%
Caerphilly *	4,900	3,100	63.3%
Blaenau Gwent **	1,900	1,200	63.2%
Anglesey *	2,700	1,700	63.0%
Wrexham	8,600	5,300	61.6%
Rhondda Cynon Taf **	4,800	2,900	60.4%
Carmarthenshire	13,300	7,600	57.1%
Monmouthshire *	4,100	2,200	53.7%
Denbighshire *	3,800	2,000	52.6%
Neath Port Talbot **	2,900	1,500	51.7%
Newport	15,300	7,900	51.6%
Powys *	5,000	2,500	50.0%
Ceredigion	4,900	2,400	49.0%
Conwy	5,600	2,700	48.2%
Merthyr Tydfil **	2,100	1,000	47.6%
Vale of Glamorgan *	6,500	3,000	46.2%
Swansea	21,800	6,400	29.4%
Cardiff	41,100	11,800	28.7%
Gwynedd **	5,800	1,500	25.9%
Torfaen **	4,100	900	22.0%

Source: StatsWales (June 2016) based on data from Labour Force and Annual Population surveys.

* Limited quality: based on between approximately 25 and 40 responses.

** Low quality: based on between approximately 10 and 25 responses.

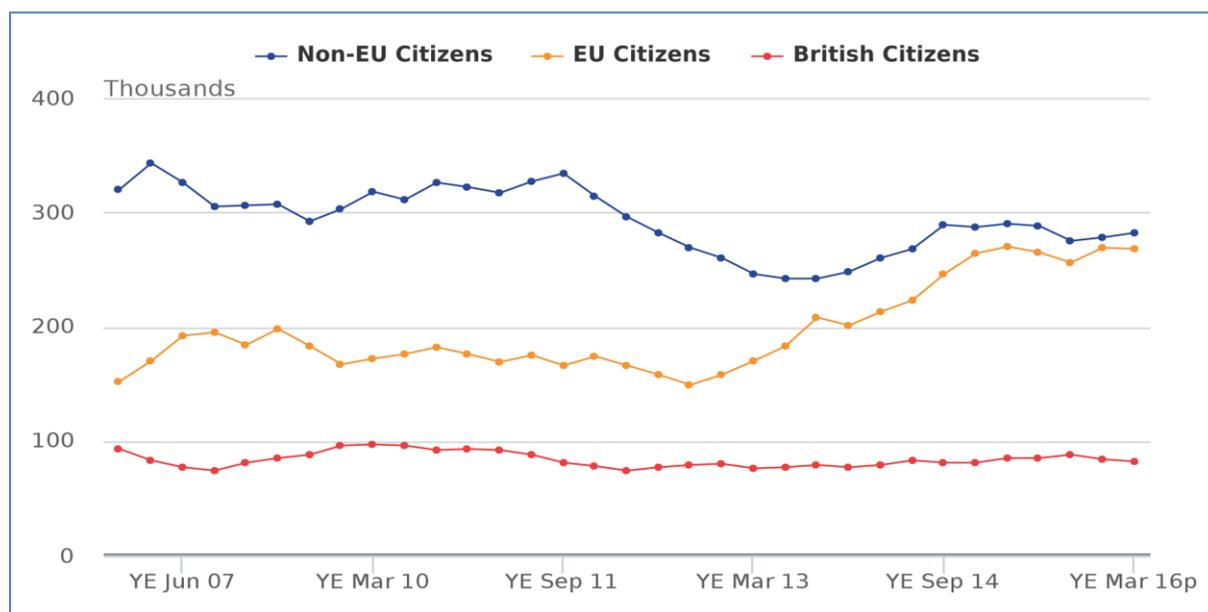
Country of origin

Analysis by Krausova and Vargas-Silva (2014) shows that the countries of origin from which the largest numbers of non-UK born people came to Wales were Poland (18,023 residents), Ireland (12,175), India (11,874), Germany (11,208) and China (6,296). The Census data show that migrants from these countries were not evenly distributed across Wales, and that Polish born residents were the least evenly distributed of the top five groups. Their share of the local non-UK born population ranged from 3.8% in Vale of Glamorgan to 38.5% in Merthyr Tydfil.

Increases in migration

The Office for National Statistics (ONS) reports that long-term immigration to the UK from the EU rose sharply between 2012 and 2014 but has since been broadly flat. It also notes that immigration of A2 citizens (from Bulgaria and Romania) have drawn level with A8 (2004 enlargement countries) for the first time (69,000 and 68,000 respectively). The gap between the numbers of non-EU and EU long term¹ migrants to the UK has also narrowed in recent years. By 2016, immigration of EU citizens was estimated to be 268,000, and immigration of non-EU citizens was estimated to be 282,000 (Figure 3).

Figure 3: Long term immigration to the UK by citizenship (2006 to 2016)

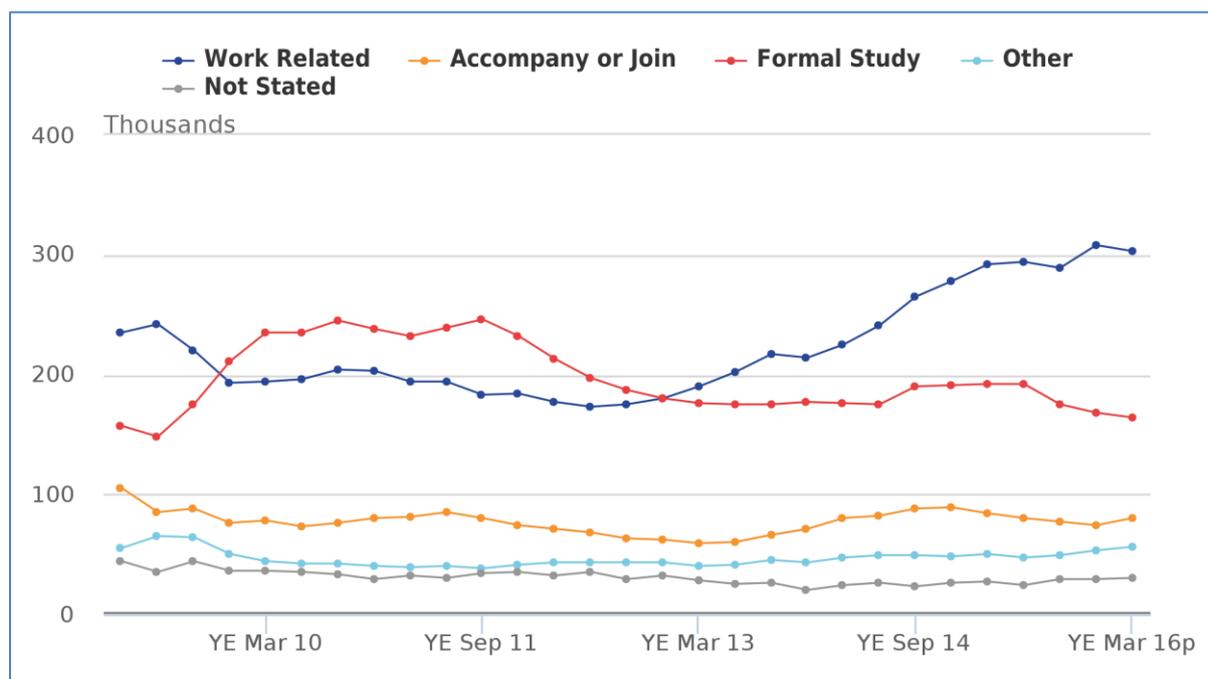


Source: Long Term International Migration based on International Passenger Survey (ONS, 2016).
NB: British citizens are those returning to the UK after living abroad for a year or more, or citizens born abroad coming to the UK for the first time.

¹ The UN defines a long term international migrant as someone who moves to a new country for a period of at least 12 months.

The number of people moving to the UK for work related reasons has risen sharply since 2013, while the number arriving for formal study has declined since 2011 (Figure 4). The majority (62%) of those whose main reason for migration was work-related were EU migrants. The majority (72%) whose main reason was study were non-EU migrants.

Figure 4: Main reason for migration (2006 to 2016)



Source: Long Term International Migration based on International Passenger Survey (ONS, 2016).

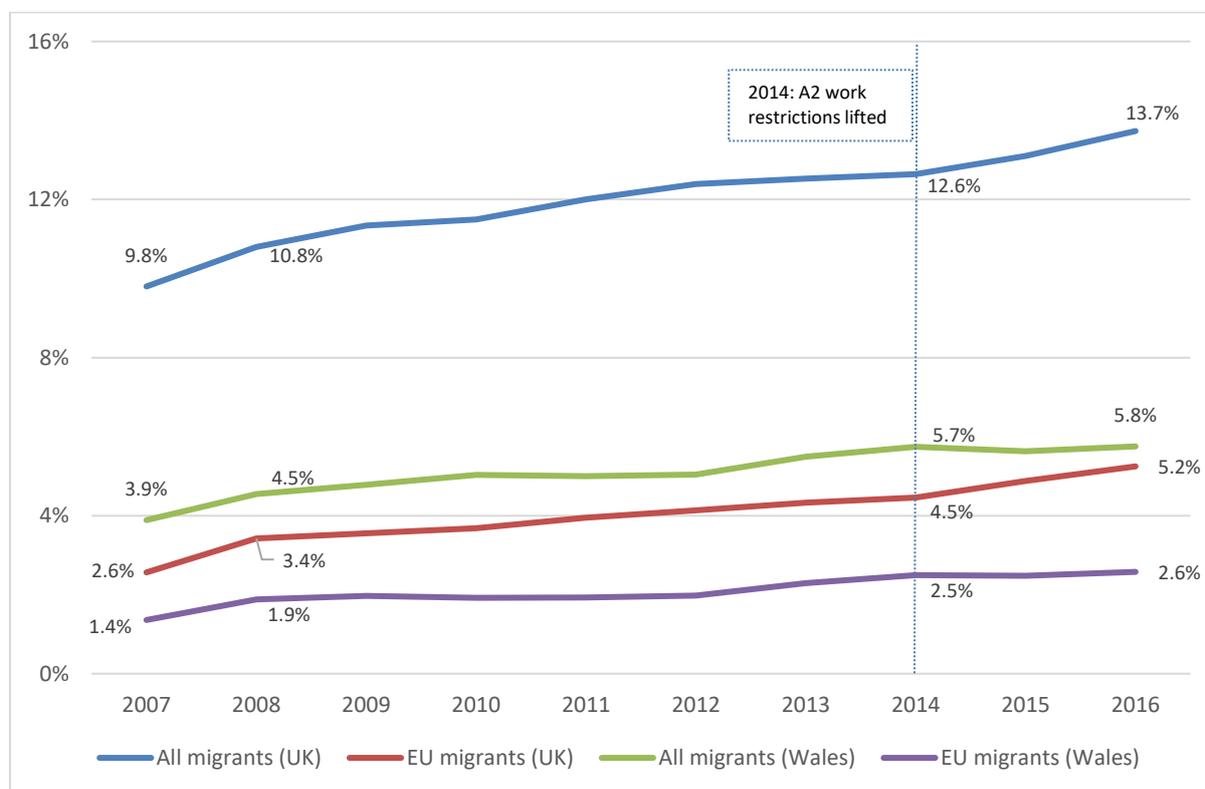
By 2016, work was the main reason cited by those moving to the UK (by 303,000 people). Almost two thirds (62%) of those who reported that they were coming for work were EU citizens and more than half of EU migrants (56%) arriving for work-related reasons reported they had already secured a job to go to.

Between 2015 and 2016, the number of EU-15 citizens migrating to the UK specifically looking for work increased significantly from 20,000 to 31,000. The ONS comments that this may, in part, reflect weaker labour market conditions in some southern EU-15 countries.

Reflecting to an extent the overall trend for the UK, the proportion of the population living in Wales that were born abroad increased from 3.9% (114,700 people) to 5.8% (176,600) between 2007 and 2016. Over the same period, the proportion of the UK population born abroad increased from 9.8% (5.9 million) to 13.7% (8.8 million).

EU migrants living in Wales increased from 1.4% of the population in 2007 (40,100) to 2.6% in 2016 (79,100). For the UK as a whole, the proportion of EU migrants increased from 2.6% (1.5 million) to 5.2% (3.4 million) (see Figure 5).

Figure 5: Migrants as a proportion of the population in Wales and the UK (2007-2016)



Source: StatsWales (June 2016) based on data from Labour Force and Annual Population surveys. In 2014, UK work restrictions on citizens from Bulgaria and Romania were lifted.

Existing data are not sufficiently robust to provide an accurate picture of increases by local authority areas right up to present. However, the Oxford Migration Observatory has analysed changes in migrant populations at local authority level in Wales between 2001 and 2011 using Census data (Krausova and Vargas-Silva, 2014).

They report that over the ten year period the number of residents in Wales who were born outside the UK increased by 82%, from 92,263 to 167,871 but there were wide variations between areas. At the upper end, Merthyr Tydfil recorded an increase of 227% (1,834 people), which was the second highest percentage increase in England and Wales, albeit from a low base. By contrast, Torfaen experienced an increase of 36% (Table 5).

Table 5: % change in non-UK born residents (2001 to 2011)

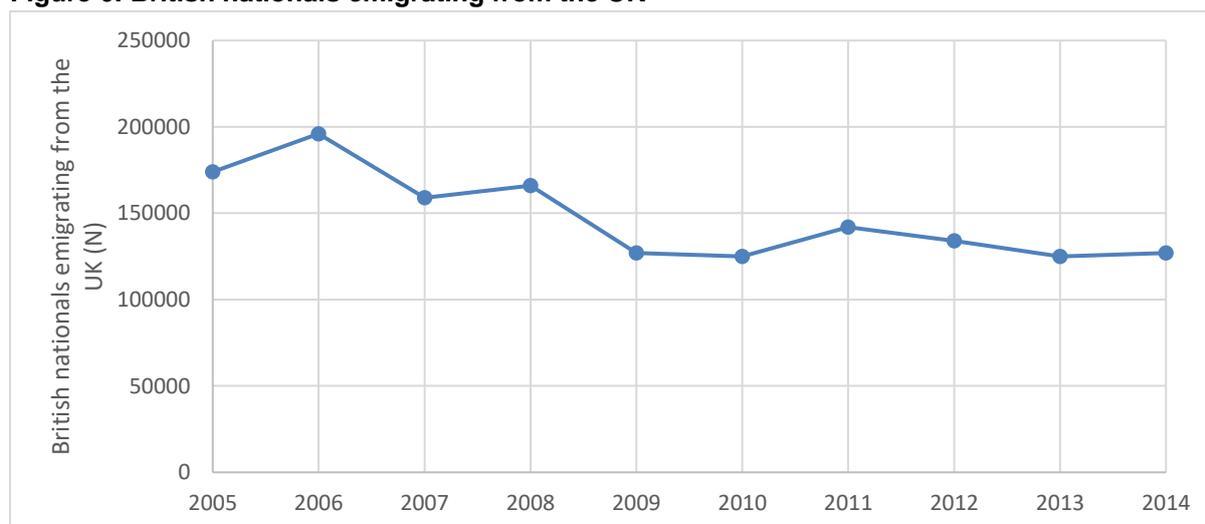
Local authority	Increase in non-UK born population	% increase in non-UK born population (2001 – 2011)
Merthyr Tydfil	1,834	227%
Wrexham	5,308	168%
Swansea	9,274	117%
Newport	6,310	105%
Cardiff	22,849	99%
Carmarthenshire	3,620	91%
Blaenau Gwent	710	90%
Gwynedd	2,755	87%
Powys	2,320	71%
Flintshire	2,621	69%
Rhondda Cynon Taf	2,982	68%
Ceredigion	1,813	66%
Bridgend	1,840	58%
Caerphilly	1,463	53%
Denbighshire	1,322	52%
Monmouthshire	1,318	48%
Neath Port Talbot	1,116	45%
Pembrokeshire	1,736	45%
Vale of Glamorgan	1,745	40%
Anglesey	670	39%
Conwy	1,351	37%
Torfaen	651	36%

Source: Census 2001 and 2011

Migration from Wales

Our rapid review found very little data on migration from Wales to other EU countries. However, according to the International Passenger Survey published by the ONS, the number of British nationals emigrating from the UK declined from 2006 to 2010 before levelling off (Figure 6). The number of emigrants peaked in 2006 at 196,000. In 2014, the number was 127,000.

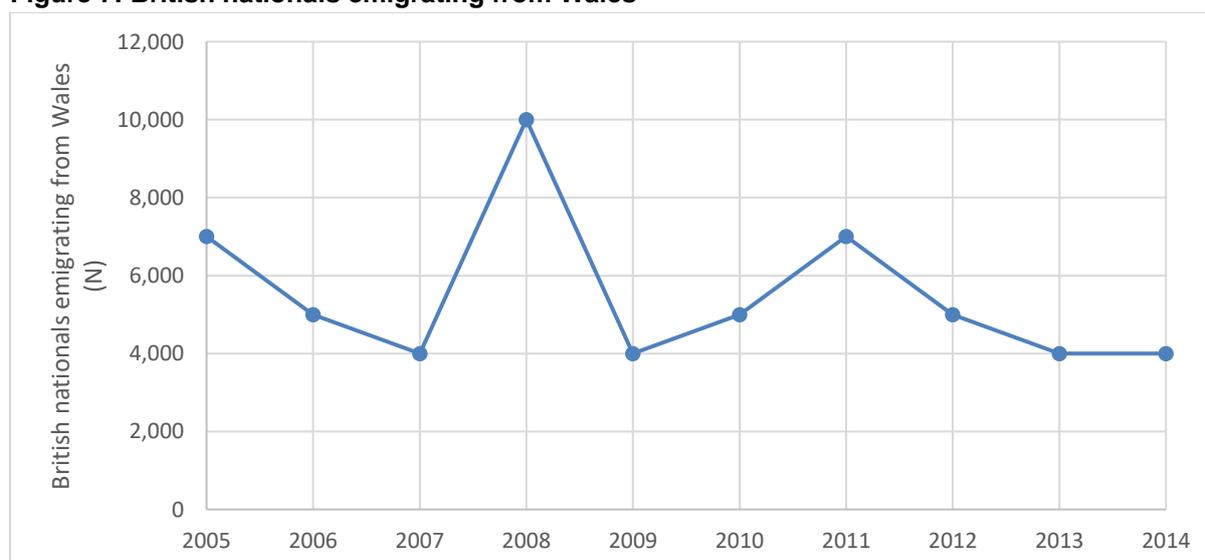
Figure 6: British nationals emigrating from the UK



Source: International Passenger Survey data (ONS).

The sample size for Wales is small so the data should be interpreted with caution. However, the pattern of emigration from Wales does not show the same downward trend between 2006 and 2010 as the UK (Figure 7).

Figure 7: British nationals emigrating from Wales



Source: International Passenger Survey data (ONS).

Labour Market and Employment Characteristics of Migrants

In 2016, EU migrants in Wales have a higher employment rate than the working age population as a whole. 79% of EU migrants of working age (16-64) in Wales are in employment compared to 71.3% of the total working age population and 69.3% of all migrants.

This is similar to the pattern in the UK as a whole where the employment rate of EU migrants is 79.5% compared with 73.7% for the general population and 71.5% for all migrants (Table 6)².

Table 6: People aged 16-64 years in employment (2016)

	Wales		UK	
	N in employment	% in employment	N in employment	% in employment
EU migrants	48,400	79.0%	2,135,600	79.5%
All migrants	97,000	69.3%	5,137,000	71.5%
Total population	1,360,400	71.3%	30,130,400	73.7%

Source: StatsWales (June 2016) based on data from Labour Force and Annual Population surveys.

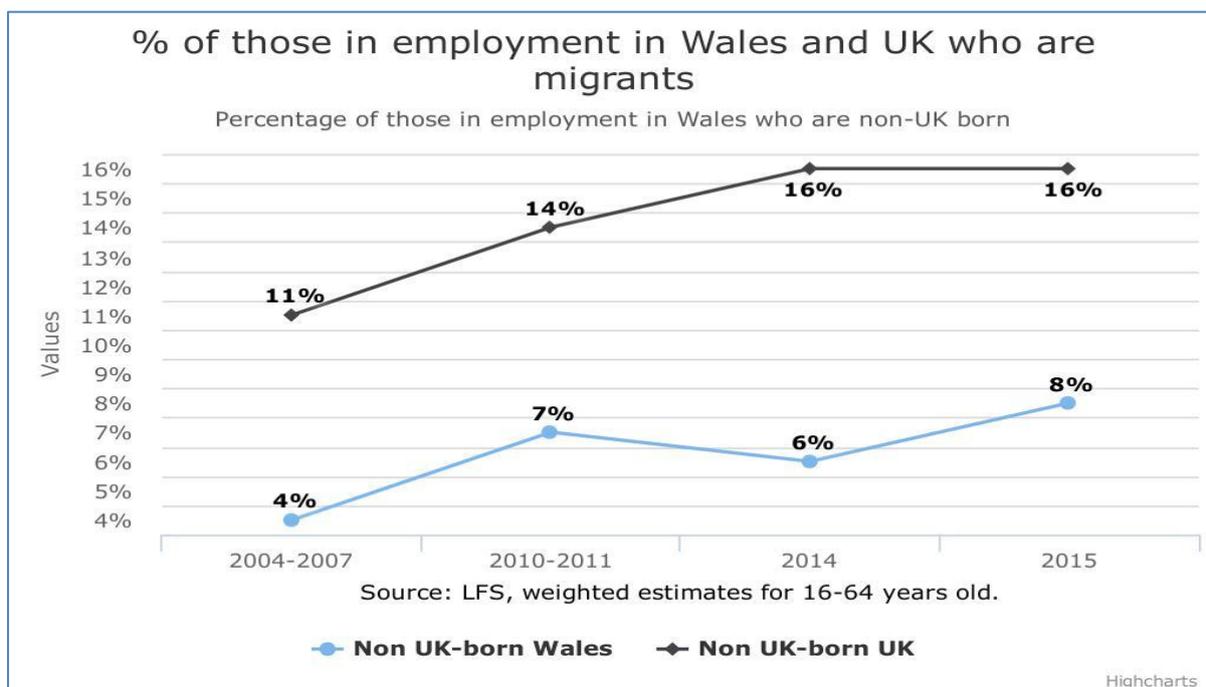
The proportion of people in employment in Wales who were migrants increased from 4% in 2004-07 to 8% in 2015^{3,4} and from 11% to 16% at UK level (Figure 8).

² National Insurance data show that there are 7,760 non-UK nationals in Wales of working age who are claiming benefits (DWP, 2016). These benefits include in-work and out-of-work benefits, covering Jobseeker's Allowance; ESA and Incapacity Benefits; Lone Parent Income Support; Carer's Allowance; Income Support and Pension Credit; Disability Living Allowance and Personal Independence Payments; and Widow's Benefit.

³ Figure 8 and Tables 7-10 are based on research by Markaki and Vargas-Silva (2016), who did not split non-UK born into EU and non-EU. The Labour Force Survey (LFS) does allow for this, although sample sizes might preclude meaningful analysis (see note below).

⁴ Estimates using the LFS are subject to significant sampling variability, as with any sample survey. In each quarter of the LFS, between 143 and 218 working age respondents who reside in Wales are non-UK born. To increase sample size and improve the reliability of the statistics, the analysis pools together all quarters for 2004-2007 (2,798 respondents), 2010-2011 (1,557 respondents), and four quarters from 2014 (773 respondents) onwards. For further discussion see the data sources and limitations section of the Migration Observatory website.

Figure 8: % in employment who are migrants



Source: Markaki and Vargas-Silva (2016) based on Labour Force Survey.

Migrants living in Wales have a slightly higher rate of self-employment than those born in the UK (Table 7).

Table 7: % of working age population who are employees or self-employed (2015)

	Wales		UK	
	Employees	Self-employed	Employees	Self-employed
Born in UK	61%	9%	64%	10%
Migrants (non-UK born)	57%	11%	59%	11%

Source: Markaki and Vargas-Silva (2016) based on Labour Force Survey.

On average, migrant workers in Wales earn slightly less than workers born in the UK (Table 8).

Table 8: Average annual salary of workers (2015)

	Wales	UK
Born in UK	£23,417	£26,050
Migrants (non-UK born)	£22,478	£26,222

Source: Markaki and Vargas-Silva (2016) based on Labour Force Survey.

Migrant workers are more likely than non-migrants to be employed in ‘elementary occupations’ (i.e. performing simple and routine tasks that often require physical effort) and, to a lesser extent, professional services (Table 9).

Table 9: Occupation groups in Wales for those of working age (2015)

	Share of UK born	Share of migrants (non-UK born)
Professional	18%	22%
Elementary	12%	19%
Caring, leisure and other services	11%	12%

Source: Markaki and Vargas-Silva (2016) based on Labour Force Survey.

The largest proportion of migrant workers work in public administration, education and health (34%), followed by distribution, hotels and restaurants (20%) and manufacturing (16%). The proportion of UK born workers in these industries is similar, with the exception of manufacturing (Table 10).

Table 10: Industries in Wales for those of working age (2015)

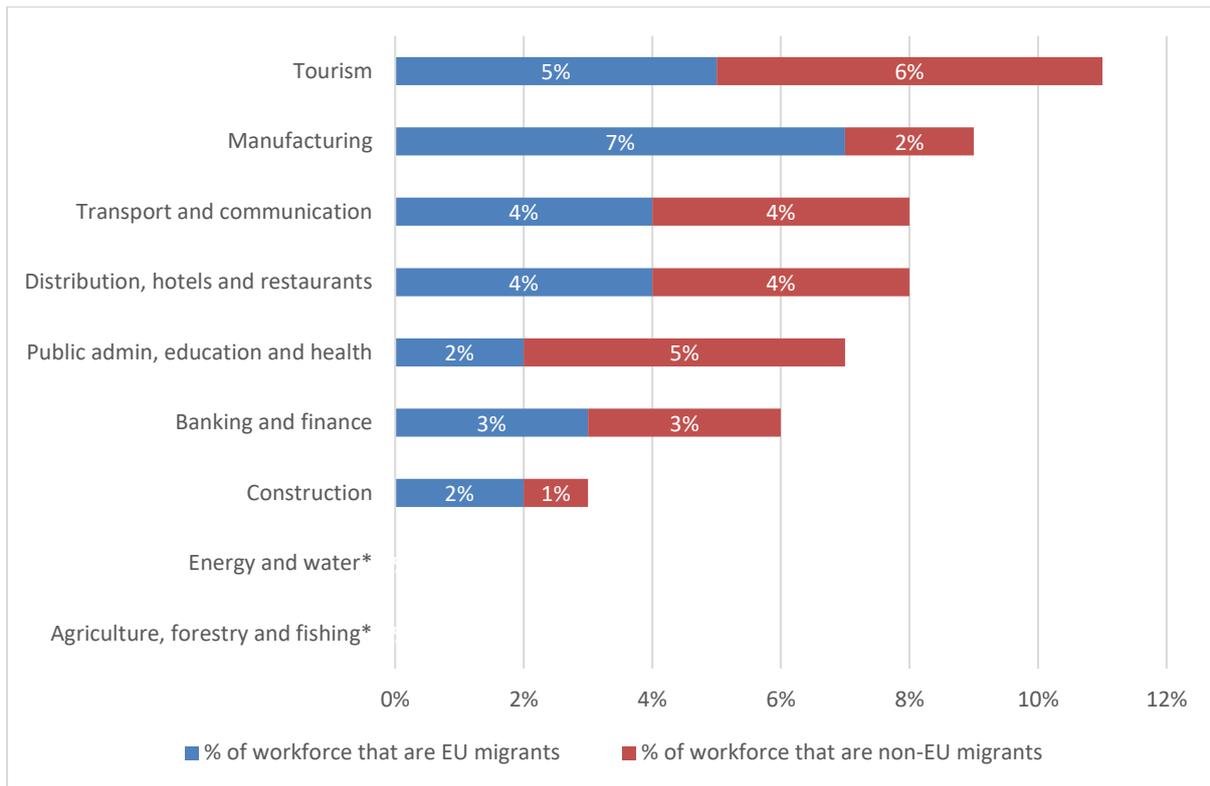
	% of UK born workers	% of migrant (non-UK born) workers
Public admin, education and health	34%	34%
Distribution, hotels and restaurants	19%	20%
Manufacturing	11%	16%
<i>Other industries</i>	36%	30%
TOTAL	100%	100%

Source: Markaki and Vargas-Silva (2016) based on Labour Force Survey.

Analysis suggests that tourism (11%) and manufacturing (9%) have the largest proportion of migrants in their workforce.

In most sectors, EU and non-EU migrants account for broadly the same proportion of the workforce but there are exceptions. There are more than three times as many EU migrants as non-EU migrants in manufacturing, while for public administration, education and health, there are more than twice as many non-EU migrants as EU migrants (Figure 9).

Figure 9: Migrants as a proportion of workforce in Wales by industry



Source: Welsh Government.

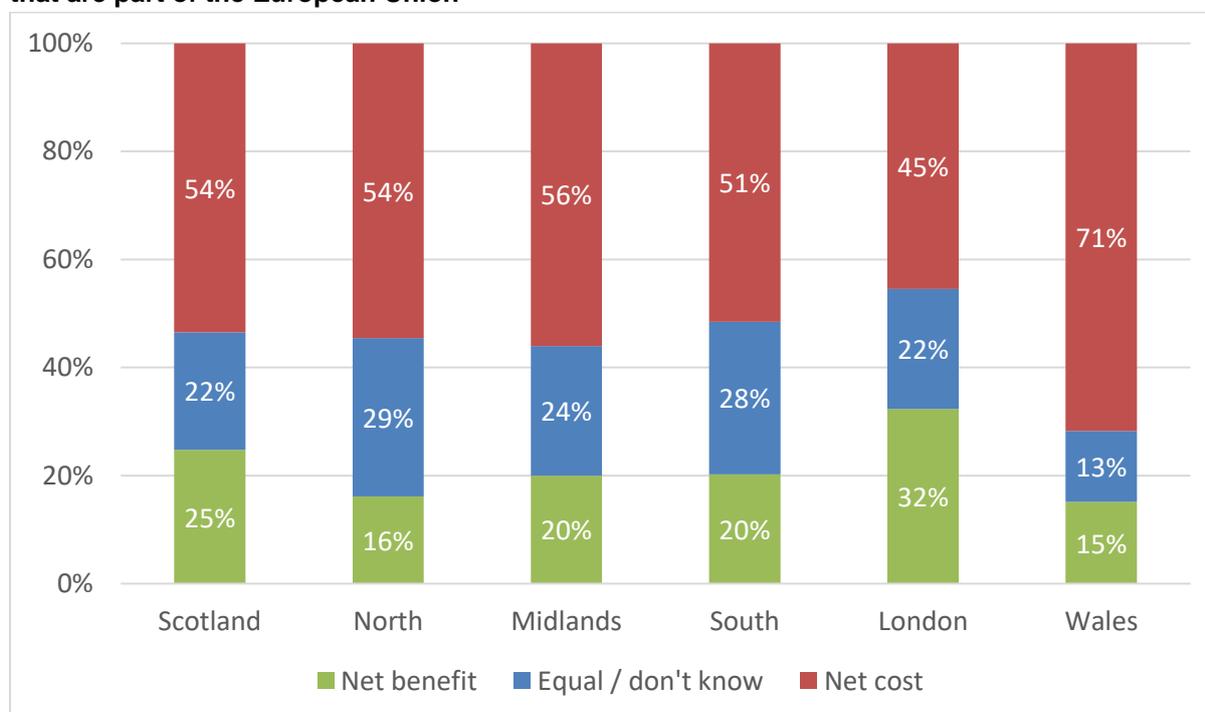
* For 'energy and water' and 'agriculture, forestry and fishing', it is estimated that EU migrants and non-EU migrants each account for less than 1% of the workforce.

Public Attitudes to Migration

Scully (2016) found that 29% of people in Wales who were questioned as part of the Welsh Election Study reported that they had an unfavourable view of Eastern Europeans who come to live in Wales. Additional (as yet unpublished) analysis of the data suggest that age, educational attainment and income level are all much stronger predictors of views towards Eastern Europeans than where people live.

The British Social Attitudes Survey found that 71% of respondents from Wales thought that EU migrant workers brought more costs than benefits which was a larger proportion than in any other part of Britain (Figure 10).

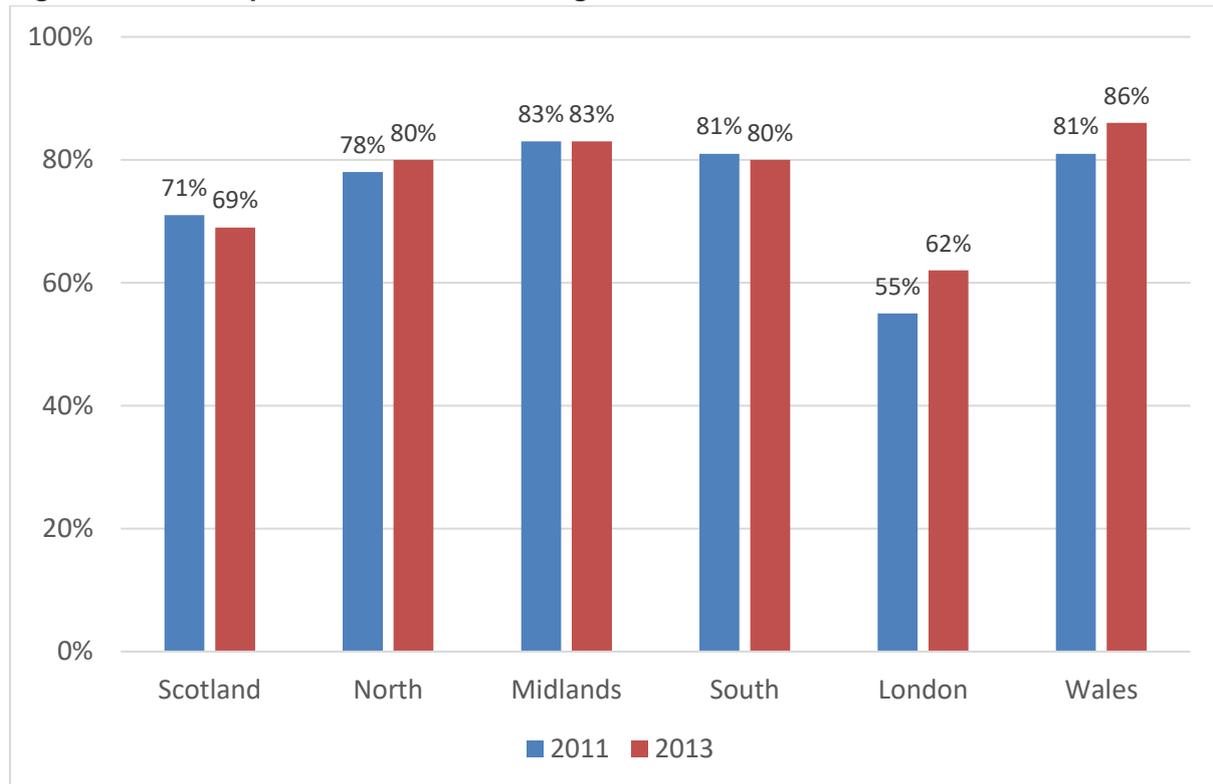
Figure 10: Perceived contribution of people who come to work in Britain from other countries that are part of the European Union



Source: British Social Attitudes Survey (2013) based on 1,055 respondents (unweighted). Sub-sample sizes are quite small, so quality of data is limited.

Although the sample sizes are small and the data should therefore be treated with caution, people in Wales seem more likely than those in other parts of Britain to favour reducing immigration, and support for this view increased between 2011 and 2013 (Figure 11).

Figure 11: % of respondents who think immigration into Britain should be reduced



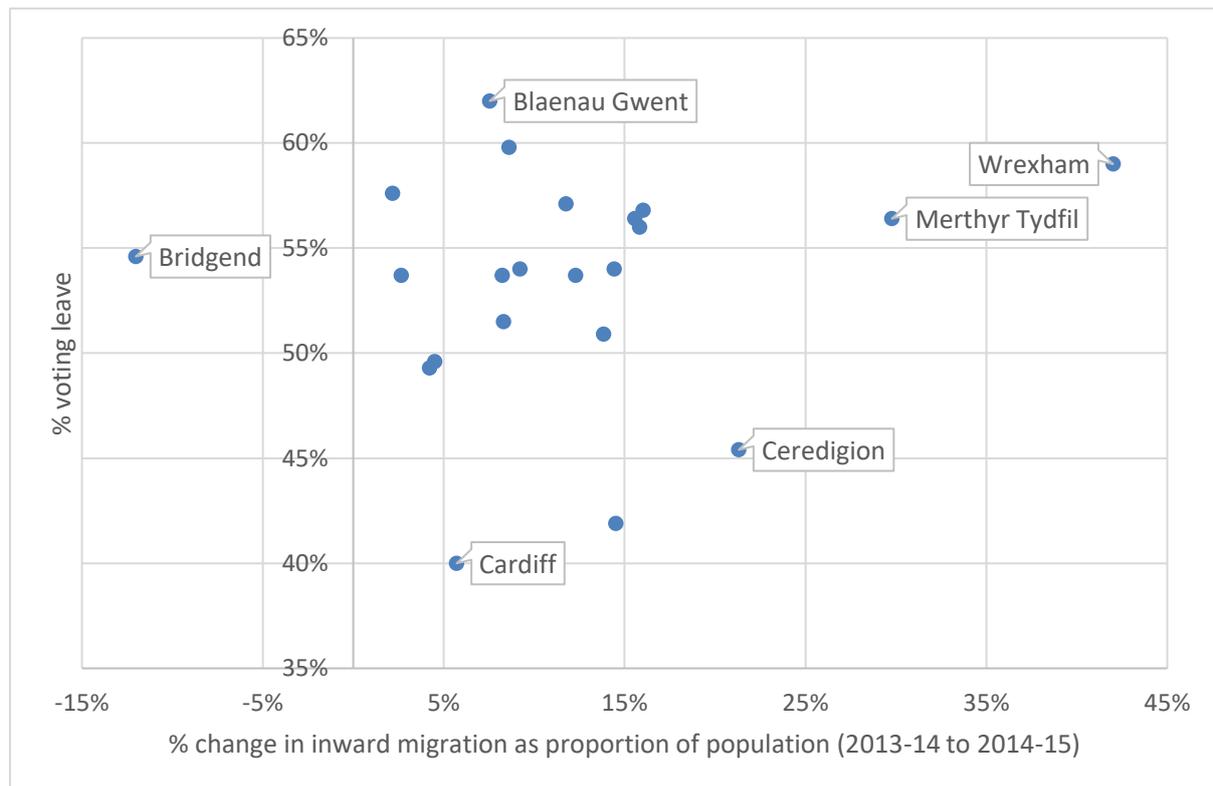
Source: British Social Attitudes Survey (2011 and 2013). Sub-sample sizes are quite small, so quality of data is limited.

At the UK level, public salience of immigration as an issue is at an all time high. In September 2015, 56% of respondents to the Economist/Ipsos Mori Issues Index mentioned immigration as one of the most important issues facing Britain. This is the highest recorded figure for immigration since the index began in the 1970s and Ipsos Mori (2016) note that there is a growing generational divide, with older people becoming more concerned than younger people about immigration.

Ipsos Mori also found that 41% of respondents had changed their views on immigration ‘a little’ or ‘a lot’ since the 2010 general election, with 86% of these becoming more worried.

Overall, change in levels of inward migration into an area is not strongly correlated with voting patterns in the EU referendum. Wrexham, Ceredigion and Merthyr Tydfil had the highest percentage changes in inward migration as a proportion of their populations between 2013-14 and 2014-15 but the proportion voting leave in these areas varied widely (Figure 12).⁵

Figure 12: Leave vote and the changes in inward migration as a proportion of population



Source: Welsh Government data

⁵ It is also noteworthy that for all areas apart from Cardiff, annual inward migration was less than 1% of the existing population. Although Wrexham, Ceredigion and Merthyr Tydfil show the largest proportional change, this only represents between a 0.1 and 0.2 percentage point increase in inward migration as a proportion of the local populations (e.g. inward migration as a proportion of the total population increased from 0.4% to 0.6% in Wrexham).

Policy Implications

The initial evidence that we have been able to draw together in this note seems to point to a number of potentially important policy implications.

First, the relatively low level of migration from the EU to Wales suggests that restrictions on free movement of people may have less impact in broad aggregate terms (in terms of restricting labour market supply or ‘freeing up’ employment opportunities for UK-born workers) than in other parts of the UK.

Second, the uneven distribution of EU migrants living in Wales means that the size of the impact of restrictions on free movement may vary between communities, or spatially concentrated industries and services.

Third, the relatively low overall level of immigration into Wales may mask the vulnerability of some public services and economic sectors to restrictions on free movement. Figure 9 (page 17) shows that tourism and manufacturing might be more susceptible than other sectors. It has also been suggested that the Welsh NHS could be vulnerable to restrictions on the number of EEA healthcare professionals working in the UK (Zolle, 2016).

Fourth, while the level of public concern about immigration has increased in recent years, levels of migration to most Welsh communities have remained relatively low. To the extent that the leave vote was driven by factors other than direct experience of immigration, restrictions on free movement may not address the underlying causes of dissatisfaction in these areas.

Next Steps

This report is based on a rapid review of the available secondary data.

The initial conclusions that we have presented could, and we believe should, be tested through more in depth analysis of administrative data which would provide a better understanding of recent migrant flows and the role that EU migrants currently play in Wales.

This analysis could also help to identify areas and sectors where restrictions on free movement are likely to have the biggest impacts and explore the impact of different scenarios in terms of restrictions on free movement of people.

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