The Impact of the Trump Reelection on Immigration Pressures in Alternative Countries

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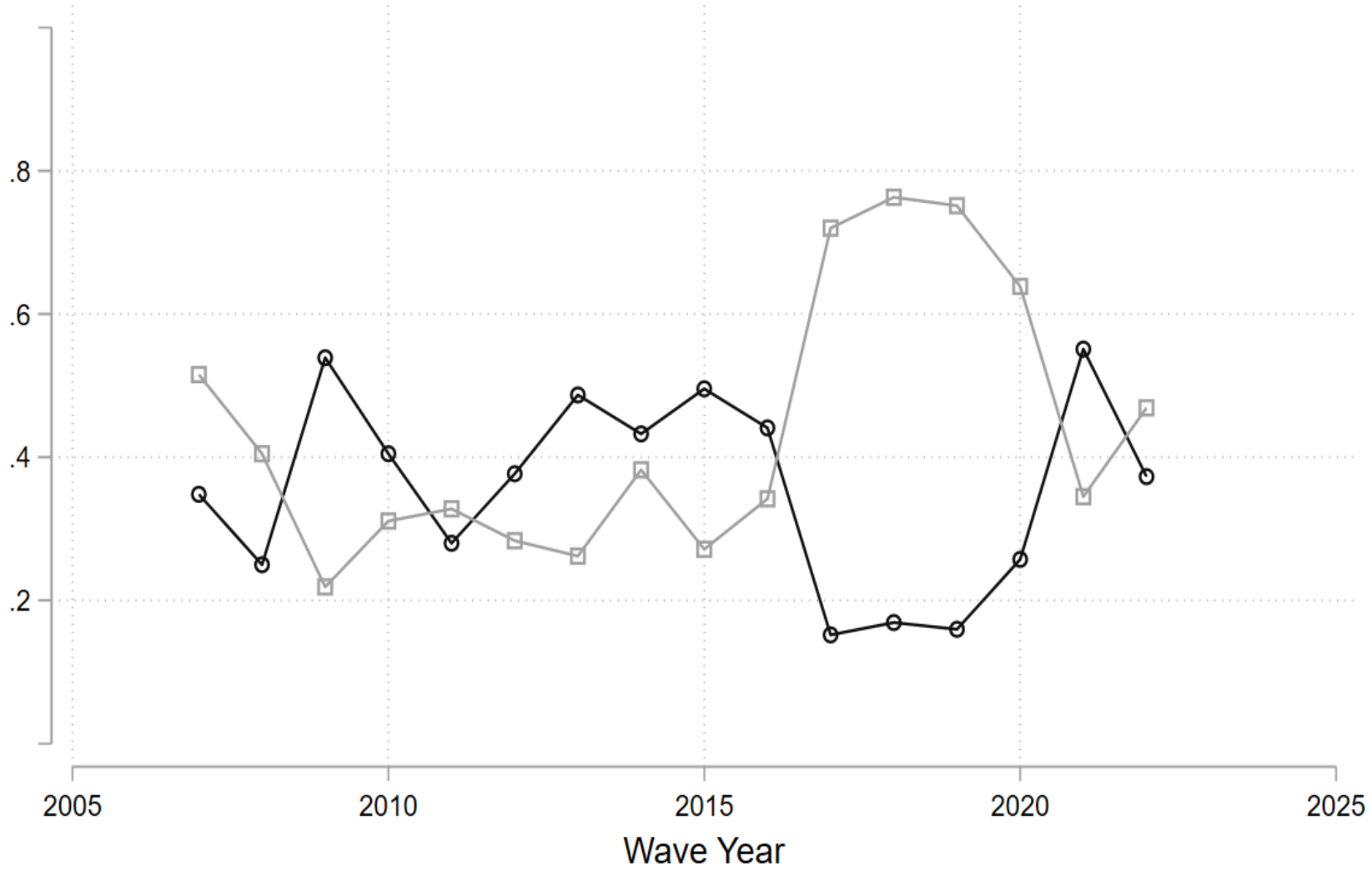
Trump reelection

- What will be the impact of the reelection of Donald Trump in 2024 on migration intentions and immigration pressures ?
- President Trump has adopted an anti-globalisation position, and in particular an anti-immigration position.
- One of his main policy proposals was to curb immigration from Latin American countries, in particular from Mexico, and to make the US less attractive for potential immigrants (America first). Statements of a possible massive deportation program
- During his administration, Trump was overwhelmingly unpopular, especially in Mexico

Trump's quotation 16 June 2015 Trump Tower NY

When Mexico sends its people, they're not sending their best. They're not sending you. They're not sending you. They're sending people that have lots of problems, and they're bringing those problems with us. They're bringing drugs. They're bringing crime. They're rapists. And some, I assume, are good people. But I speak to border guards and they tell us what we're getting. And it only makes common sense. It only makes common sense. They're sending us not the right people. It's coming from more than Mexico. It's coming from all over South and Latin America, and it's coming probably – probably – from the Middle East. [...]. And it's got to stop and it's got to stop fast.

US leadership disapproval in Mexico



Trump's quotation 15 January 2024 Iowa Caucuses

We're going to seal up the border. Because right now we have an invasion of millions and millions of people that are coming into our country. I can't imagine why they think that's a good thing. It is a very bad thing. I think it's a group of people that is probably larger in number than New York State. And we can't have that.It is not sustainable as a country. [...]. And you know they're coming from prisons and jails. [...]. And they're terrorist.[...] and nobody knows where they are. [...] And we're going to have deportations, to a level of deportation that we haven't seen in this country for a long time since Dwight Eisenhower actually.

Research questions

- We estimate the impact of a Trump reelection on migration intentions of Mexican residents
- Impact on the US (Trump presidency as a factor of attractiveness)
- We estimate the substitution effects across alternative destinations.
- We simulate and quantify the impact of a Trump reelection on immigration pressures to alternative countries.

Key Findings

- Trump's reelection decreases attractiveness for potential Mexican immigrants $\rightarrow$ decrease of more than 1 mio. aspirational migrants
- Substitution effects across alternative countries are highly heterogenous.
- Increase in immigration pressures much bigger for countries such as Canada, UK, and a set of European countries such as Spain and France.
- Failure to use models capturing heterogenous substitution patterns and allowing for departure from IIA hypothesis leads to significant mistakes in predicting immigration pressures associated to such an event.
- For instance, better modelling tends to show impact on intended stay rates in Mexico is smaller since Mexico is seen as a poor substitute to the US as a location alternative.

Key Findings

- Trump can create a vicious circle and acts as a negative selection device in immigration.
- Selection ratios in terms of skills decreases for the US.
- Main alternative foreign locations win : selection improves further. Selection in Mexico remains unaffected.

How do we do that?

- Key data :migration intention data from the Gallup World Poll Survey conducted in Mexico over 2009-2019. Impact by variations in approval/disapproval of Mexican residents about US leadership.
- We estimate the impact of disapproval of US leadership on location decisions of Mexican respondents using discrete choice analysis. We estimate a Cross-Nested Model better capturing heterogeneity in substitution patterns across location choices.
- We estimate cross elasticities of US leadership disapproval for each potential destination (including Mexico). Heterogeneity in the cross-elasticities is a key ingredient for simulating impact of Trump reelection.
- We consider alternative scenarios of impact of Trump on disapproval of US leadership of Mexican respondents. In the base scenario, Trump reelection is supposed to increase disapproval from about 35% to 75% (in line with observations

Connections with existing literatures: governance, populism or attitudes

Impact of governance, populism or attitudes as a factor of attractiveness for migration decisions :

- Governance and integration policies: most papers focus on impact on emigration (Poprawe, 2015; Baudassé et al. (2018); Hiskey et al. (2014); Ariu et al., 2016); Positive impact of integration policies at destination (Beine, Machado and Ruyssen, 2020).
- Impact of populism on mobility: Bellodi et al. (2024) on internal mobility in Italy.
- Attitudes: Tonini et al. (2023); Battiston et al. (2023); Bacher, Beine and Rapoport (2023); Gorinas and Pytlikova (2017); Slotwinski and Stutzer (2019).

Connections with existing literatures: use and modelling of migration aspirations

Migration aspirations and intentions.

- Use of migration aspiration data: see Aslany (2021) for a review. Identification of self selection factors: Docquier et al. (2014); Manchin et al. (2014); Ruyssen and Salamone (2018); Dustmann and Okatenko (2018).
- Modelling of migration aspirations: Bertoli and Ruyssen (2018); Clemens and Mendola (2020); Beine, Bierlaire, Docquier (2023).
- Use aspiration data for predicting future flows: Özden et al. (2018). Discussion about various types of intentions: Migali and Scipioni (2019); Huber et al. (2022)

Connections with existing literatures: substitution effects

Estimation of substitution effects in migration decisions;

- Identification of substitution effects of factors is related to important concepts in migration : IIA for individual data and Multilateral Resistance to Migration (Gravity models)
- Attempts to depart from IIA hypothesis : Monras (2020) ; Buggle et al. (2023); Beine, Bierlaire and Docquier (2024).
- Accounting for MRM in Gravity models of migration : Bertoli and Fernandez-Huerta Moraga (2012, 2016).
- Estimation of direct and indirect effects for asylum seekers : Gorlach (2021), Guichard and Machado (2022). For family reunification : Bartu et al. (2020); impact of provisions in trade agreement on other corridors (Beverelli et al., 2019).

Connections with existing literatures: Mexico-US case

- Migration corridor Mexico-US largest worldwilde $\rightarrow$ large literature focusing on this corridor.
- Self-selection: Borjas (1987), Chiquiar and Hanson (2005).
- Income Maximisation : Grogger and Hanson, 2011.
- Networks and negative selection: McKenzie and Rapoport (2010).
- Labour Market impact and policy restrictions: Clemens, Lewis and Postel (2018).

Our Contribution

- We estimate in a precise way the direct and indirect effects on location choices of a major political shock , i.e. Trump reelection.
- We quantify the impact on immigration pressures coming from Mexico, an important emigration country, of a possible negative shock on the most popular destination (the US include 97% of Mexican emigrants).
- We highlight how important it is to take that into account for some other destinations that are perceived as close substitutes to the US.

Random Utility Models

- We estimate discrete choice models of location within the random utility class of models
- Random utility maximization model with linear utility function

$$U_{jn} = V_{jn} + \epsilon_{jn} \tag{1}$$

- Utility U_{jn} of location j for individual i broken down into a deterministic part (V_{jn}) and a stochastic part (ϵ_{jn})

Deterministic part (V_{jn})

- Utility of domestic location : includes personal characteristics (education, gender, age) and personal income at origin.

$$V_{0n} = D_n'\beta + \delta_0, \quad j = 0. \tag{2}$$

Deterministic part (V_{jn})

- Utility of foreign destination j: includes distance , income at destination, networks, size at destination + country dummies corresponding to nests.

US destination ($j = 1$):

$$V_{1n} = Z'_{jn}\gamma + \delta_{m(j)} + \theta Disapp_{US,n} \quad (3)$$

Other foreign destinations ($j = 2, ..., J$):

$$V_{jn} = Z'_{jn}\gamma + \delta_{m(j)}, j = 2, ..., J \quad (4)$$

- : direct effect captured by elasticity computed from $\hat{\theta}$
- : indirect (substitution) effect captured by cross-elasticity computed from $\hat{\theta}$.

Estimating impact of US governance

- We estimate impact of US governance on location choice by including $Disapp_{US,n}$ in the utility of US location variable. $Disapp_{US,n} = 1$ if individual n disapproves US leadership, 0 otherwise.
- From the estimation of θ, we can estimate the (individual) direct elasticity of disapproval :

$$E^{P_n(US)}_{Dis_{US,n}} = \frac{\partial P_n(US)}{\partial Dis_{US,n}} \times \frac{Dis_{US,n}}{P_n(US)} \tag{5}$$

- This captures the direct impact of US governance on the probability of choosing the US as the preferred location.

Estimating impact of US governance

- From the estimation of θ, we also estimate the (individual) cross-elasticity of disapproval ($j \neq$ US) :

$$E^{P_n(j)}_{Dis_{US,n}} = \frac{\partial P_n(j)}{\partial Dis_{US,n}} \times \frac{Dis_{US,n}}{P_n(j)} \tag{6}$$

- This captures the substitution effect, i.e. the impact of US governance on the probability of choosing any other potential location.
- The cross-elasticity highly depends on the type of DCM, i.e. on the way we model the stochastic part and the way we capture heterogeneity in the substitution across locations.

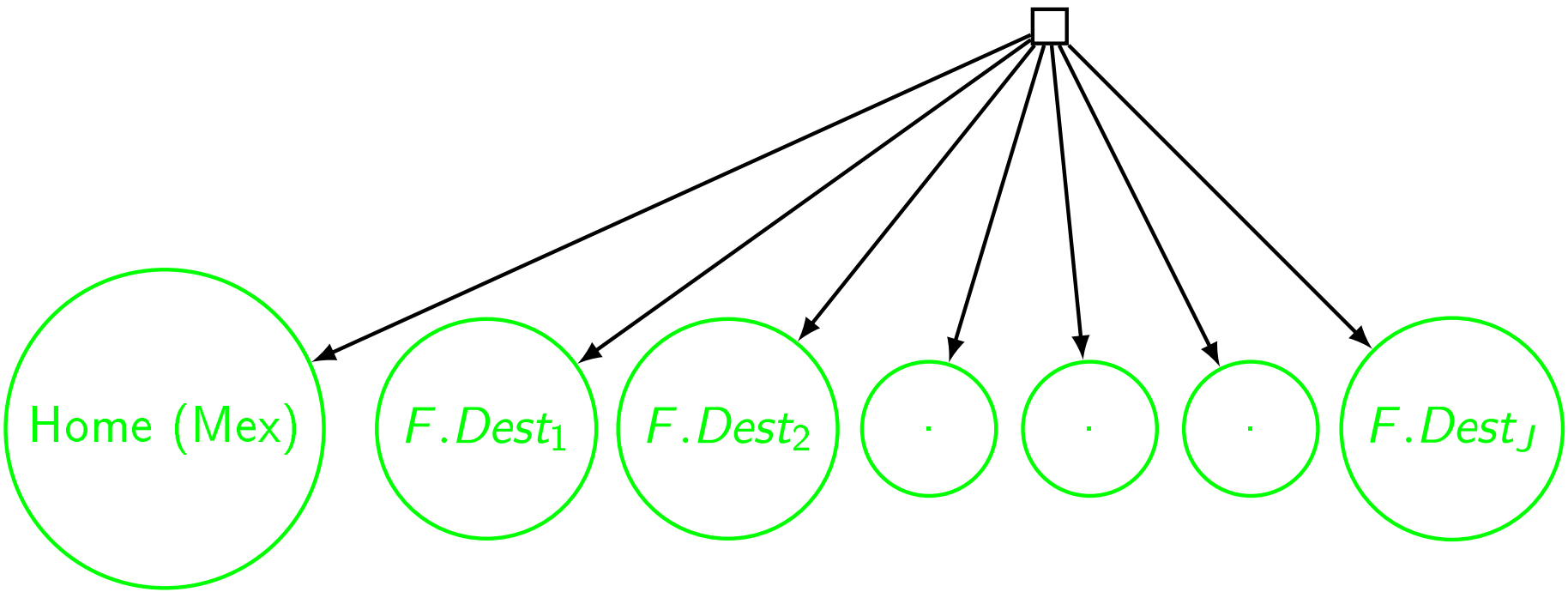
Stochastic part (ϵ_{jn})

- Choice of discrete choice model depends on the specification of ϵ_{jn}.
- Multinomial Logit assumes Independence of Irrelevant Alternatives; rests on an extreme value distribution of type 1. $\rightarrow$ Multinomial Logit assumes homogeneity in the substitution between the US and any alternative location.
- It also implies the property of proportionate shifting (Train, 2009) and homogenous cross elasticities: $E^{P_n(j)}_{Dis_{US,n}}$ will be the same for all locations.
- The IIA hypothesis is likely violated in the context of migration $\rightarrow$ we need alternative specifications $\rightarrow$ Nested Logit and Cross-Nested Logit

Reminder: IIA hypothesis

- if $C_1 \ni \{A, B, C\}$ and $C_2 \ni \{A, B\}$, under IIA, $\frac{P(A)}{P(B)}$ equal in C_1 and C_2
- If the US is no longer accessible, intended movers to the US will spread out equally in alternative locations.
- Issue: IIA is likely wrong because some locations are more substitutable (correlated) than others. This is reflected in correlated errors across locations.

Figure: Structure of Multinomial Logit model of migration.



Our model: Cross-nested model

- CNL model based on Multivatiate Extreme Value (MEV) distibution with M nests (Vovsha, 1997; Ben-Akiva and Bierlaire, 1999). Introduced in migration by Beine, Bierlaire and Docquier (2023).

$$P_n(j|C) = \sum_{m=1}^{M} \frac{\left(\sum_{k\in\mathcal{C}_n} \alpha_{km}^{\mu_m/\mu} e^{\mu_m V_{kn}}\right)^{\frac{\mu}{\mu_m}}}{\sum_{p=1}^{M}\left(\sum_{k\in\mathcal{C}_n} \alpha_{kp}^{\mu_p/\mu} e^{\mu_p V_{kn}}\right)^{\frac{\mu}{\mu_p}}} \frac{\alpha_{im}^{\mu_m/\mu} e^{\mu_m V_{in}}}{\sum_{j\in\mathcal{C}_n} \alpha_{km}^{\mu_m/\mu} e^{\mu_m V_{jn}}},$$

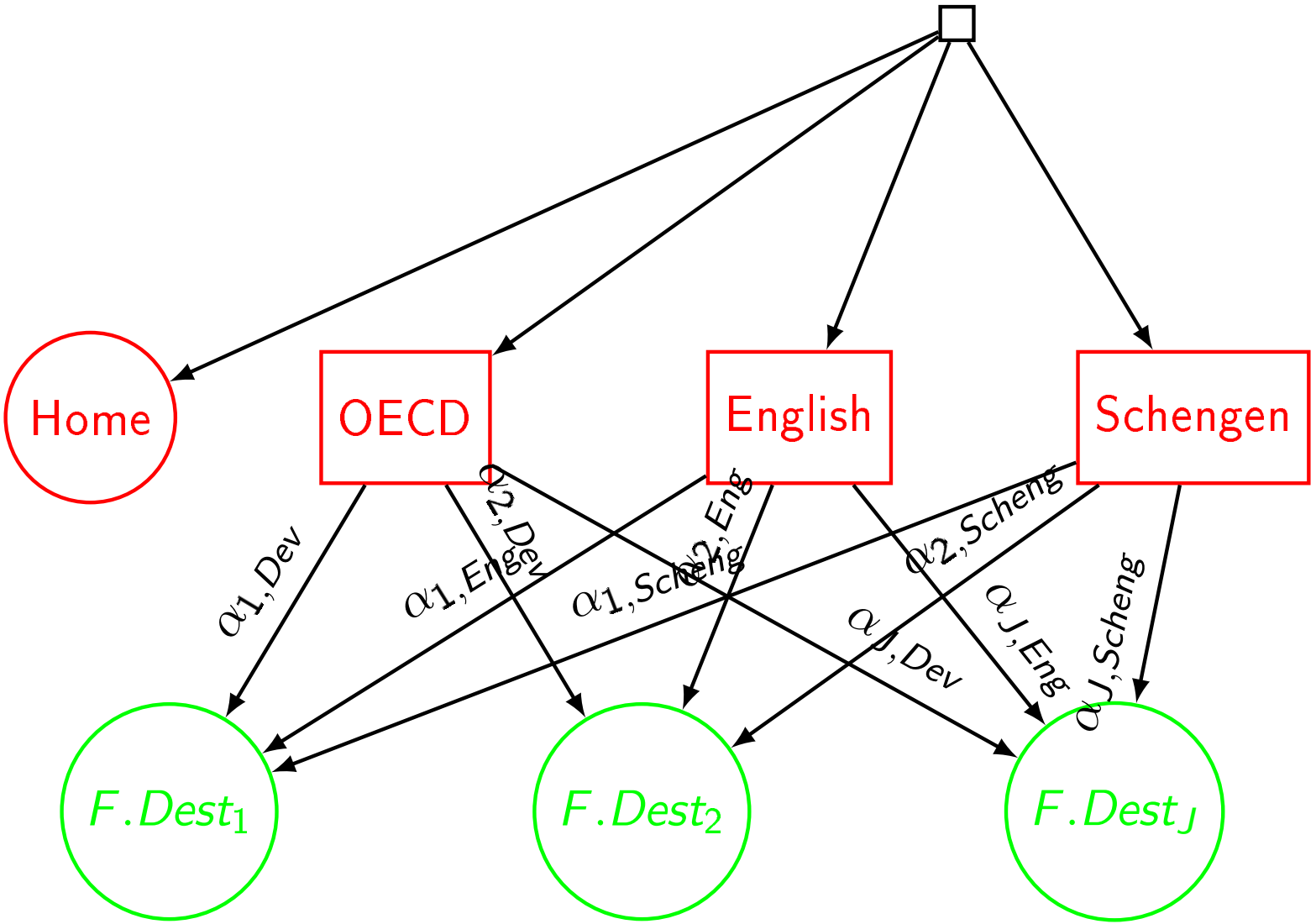
$$P_n(j|C) = \sum_{m=1}^{M} P_n(m|\mathcal{C}_n) P_n(j|m), \tag{7}$$

$$P_n(j|m) = \frac{\alpha_{jm}^{\mu_m/\mu} e^{\mu_m V_{jn}}}{\sum_{k\in\mathcal{C}_n} \alpha_{km}^{\mu_m/\mu} e^{\mu_m V_{kn}}}, \tag{8}$$

Our model: Cross-nested model

- CNL generalizes Nested Logit model by combining underlying dimensions of nests $\rightarrow$ overlapping nests of destinations .
- μ_m degree of similarity of destinations in nest m; α_{jm}: participation parameter of destination j to nest m.
- Each destination belongs to different nests with $\sum_{m=1}^{M} \alpha_{jm} = 1 \ \forall j$.

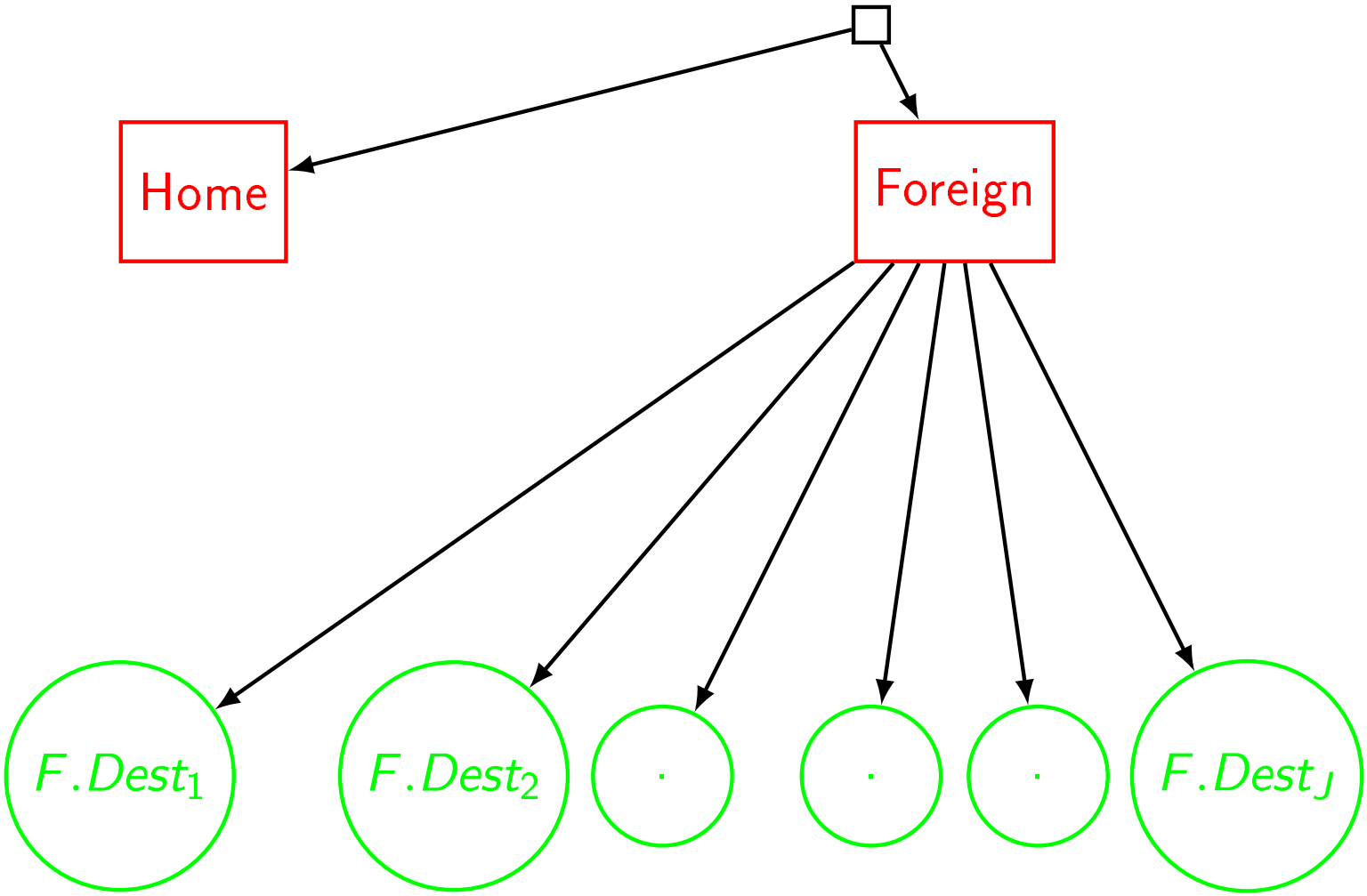
Figure: Structure of the CNL model for migration.



Specification of the Cross-nested model

- We specify 3 nests: OECD destination, English-speaking and Schengen. Each nest includes countries that share some similarities in the ϵ_{jn}. Nests are validated statistically.
- Main implication: cross-elasticities are different between countries not in the same nests $\rightarrow$ more complex substitutions.
- We also estimate for comparison Nested Logit with separate nest for domestic location (Buggle et al., 2023; Ortega and Peri, 2013).

Figure: Nested Logit for migration (Buggle et al., 2023; Monras,2020; Ortega and Peri, 2013)



Main source : Gallup World Poll Survey (Mexico)

- Comprehensive harmonized surveys across the world; Repeated cross-section over 2006-2022 period. Estimation period : 2009-2019.
- Covers adult world population in almost all countries; Representative at national level; Rich data on individual characteristics.
- We leverage migration intentions and disapproval rates of Mexican respondents from GWPS.

Outcome variable :Migration intention data

- 2 daughter key questions:

Migration aspiration data

1. "Ideally, if you had the opportunity, would you like to move permanently to another country, or would you prefer to continue living in this country?"
2. "To which country would you like to move?"

- We have individual intentions to move to 96 potential destinations. We include zeros.

WP3120 — Country Would Move To

	Freq.	Percent	Cum.
United States	790	45.51	45.51
Canada	184	10.60	56.11
Spain	137	7.89	64.00
Germany	108	6.22	70.22
France	79	4.55	74.77
Italy	38	2.19	76.96
Brazil	36	2.07	79.03
Japan	35	2.02	81.05
United Kingdom	29	1.67	82.72
China	25	1.44	84.16
Albania	24	1.38	85.54
Cuba	23	1.32	86.87
Switzerland	22	1.27	88.13
Australia	20	1.15	89.29
Argentina	20	1.15	90.44
Netherlands	14	0.81	91.24
Afghanistan	10	0.58	91.82
Venezuela	9	0.52	92.34
Colombia	9	0.52	92.86
Algeria	8	0.46	93.32
Total	1,736	100.00	
Stayers	7,849	81.88	

(a) Pre

WP3120 — Country Would Move To

	Freq.	Percent	Cum.
United States	212	33.81	33.81
Canada	137	21.85	55.66
Spain	50	7.97	63.64
Germany	47	7.50	71.13
France	32	5.10	76.24
Italy	14	2.23	78.47
Russia	14	2.23	80.70
Brazil	12	1.91	82.62
Japan	11	1.75	84.37
United Kingdom	10	1.59	85.96
China	10	1.59	87.56
Switzerland	9	1.44	89.00
Netherlands	8	1.28	90.27
Australia	8	1.28	91.55
Cuba	7	1.12	92.66
Ireland	7	1.12	93.78
Norway	6	0.96	94.74
Argentina	4	0.64	95.37
Colombia	4	0.64	96.01
Chile	3	0.48	96.49
Finland	3	0.48	96.97
Iceland	3	0.48	97.45
Total	627	100.00	
Stayers	2,251	78.21	

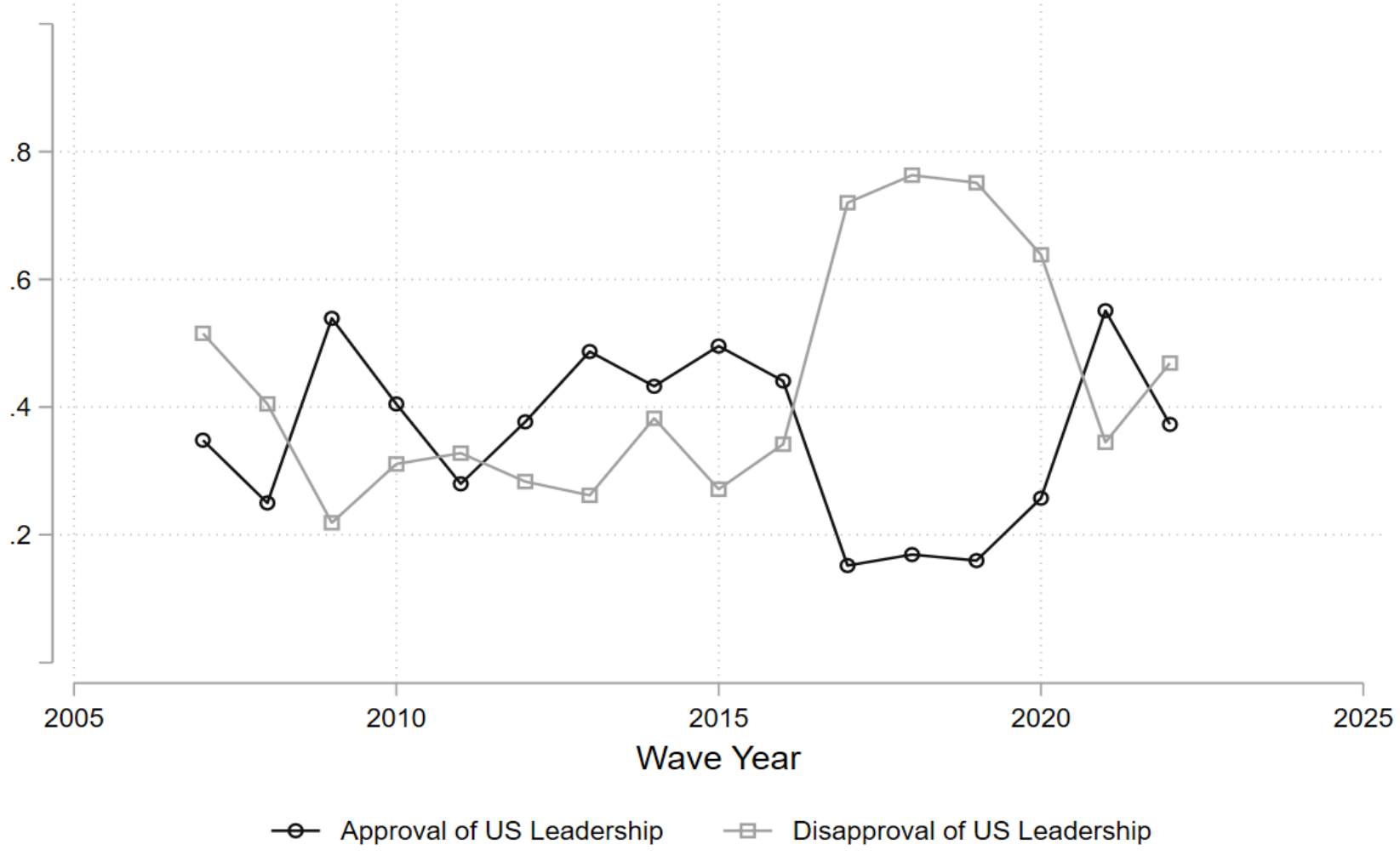
(b) Post

Table: **Most Popular Destinations for Mexicans in Gallup World Poll (2007–2019) by Pre- and Post-Period.**

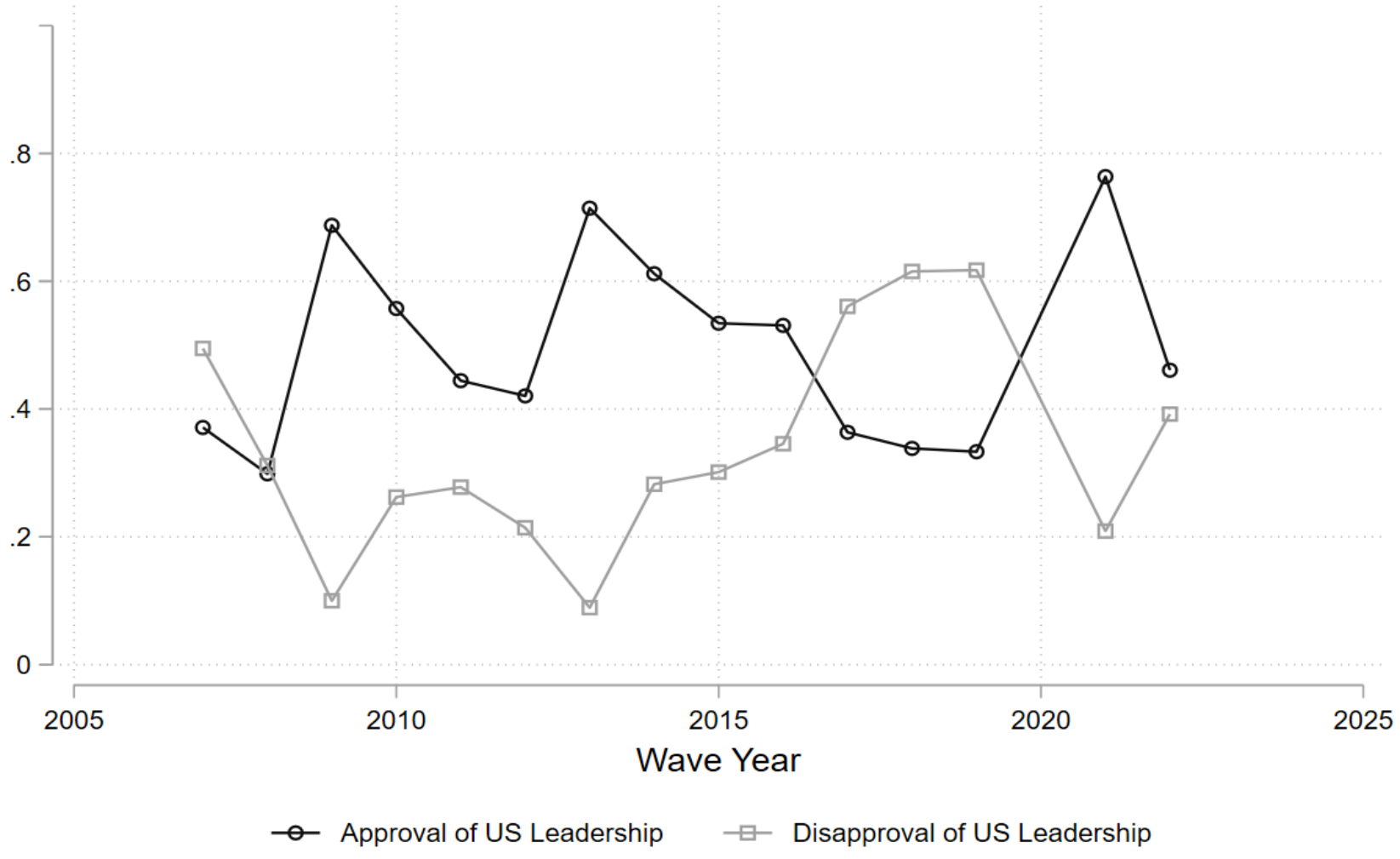
Disapproval about US leadership

- Our key variable to estimate impact of Trump and to simulate effects of reelection is based on a question on disapproval about US leadership.
- Asked in all countries. We use individual responses of Mexican respondents.
- Strong increase in 2017; back to pre-Trump levels in 2021.

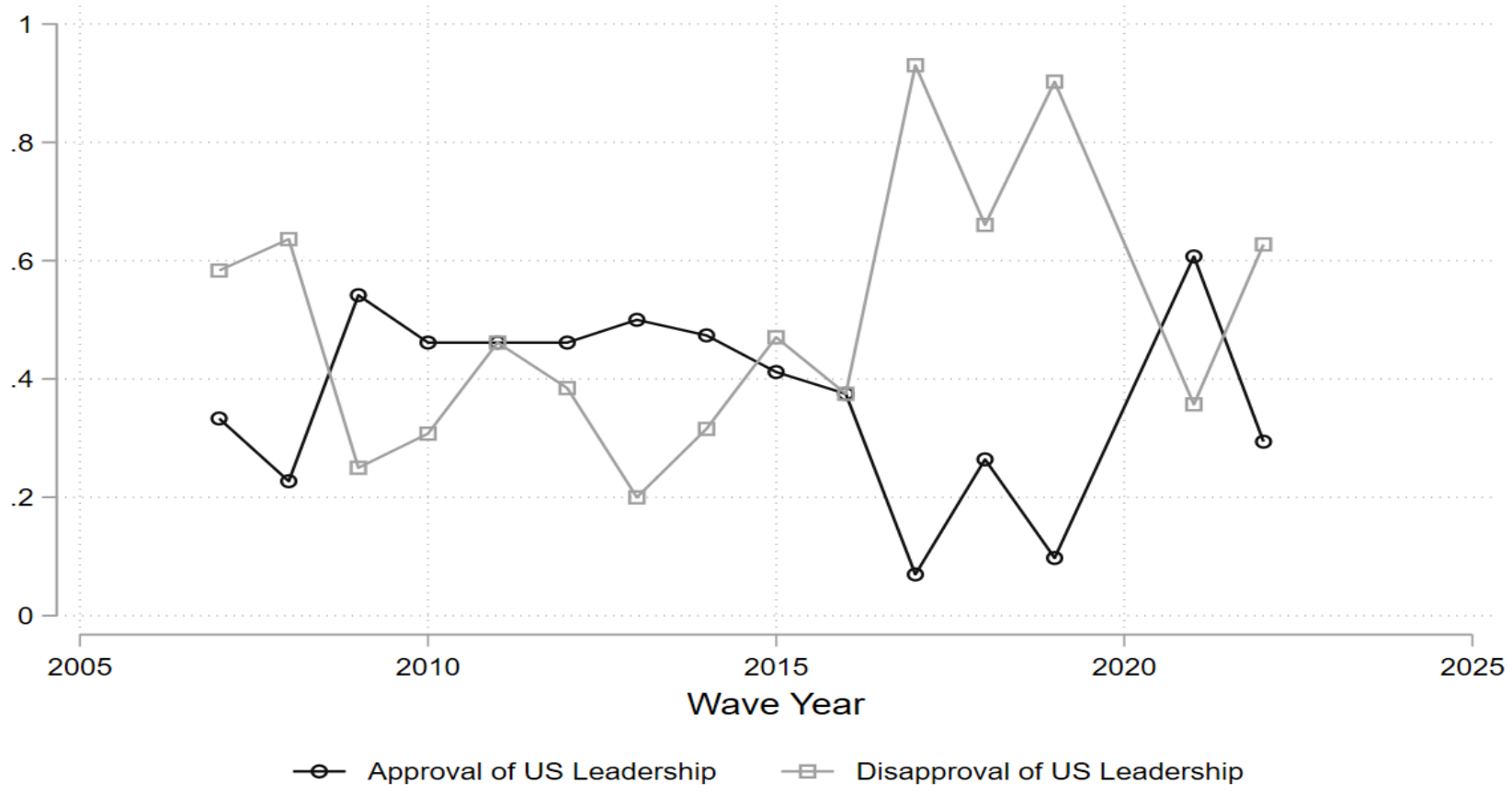
US leadership disapproval in Mexico: all respondents



US leadership disapproval in Mexico: intended movers US



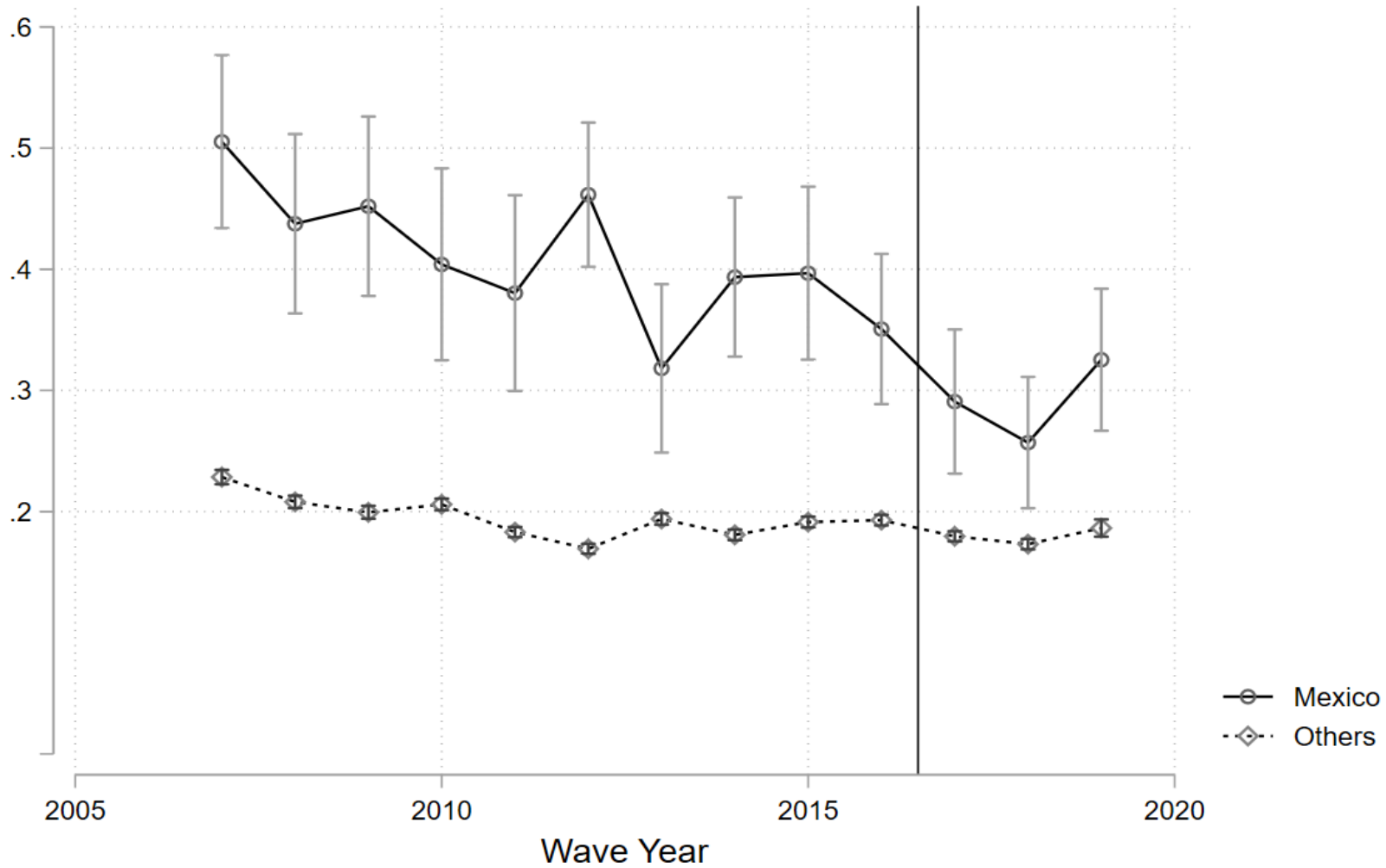
US leadership disapproval in Mexico: intended movers Canada



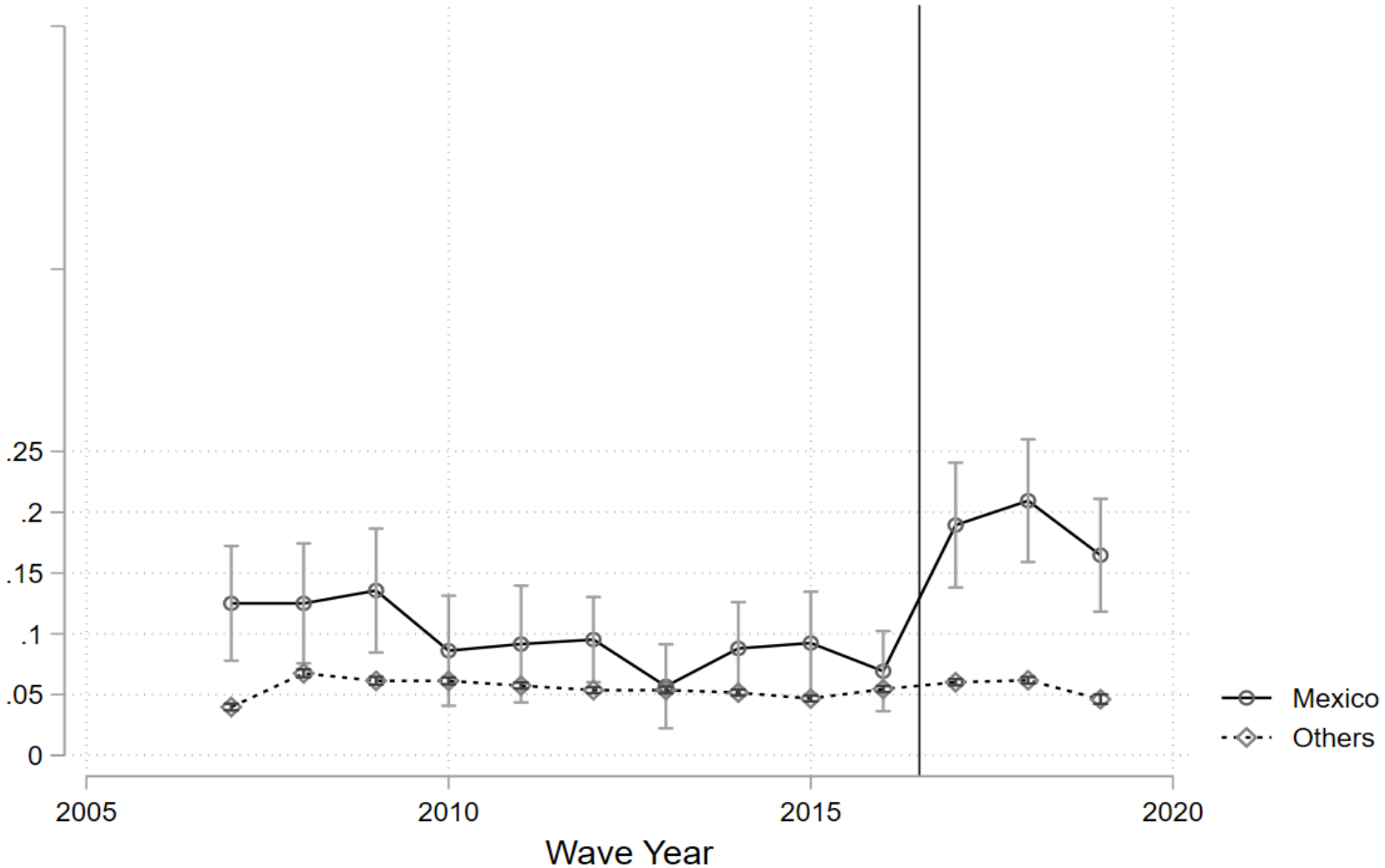
Other data

- Domestic utilities: Personal income at origin; personal network; education; gender; marital status (Gallup).
- Country-specific covariates: Distance (Cepii); GDP per capita (IMF); Diasporas (UN-WB); population (UN)

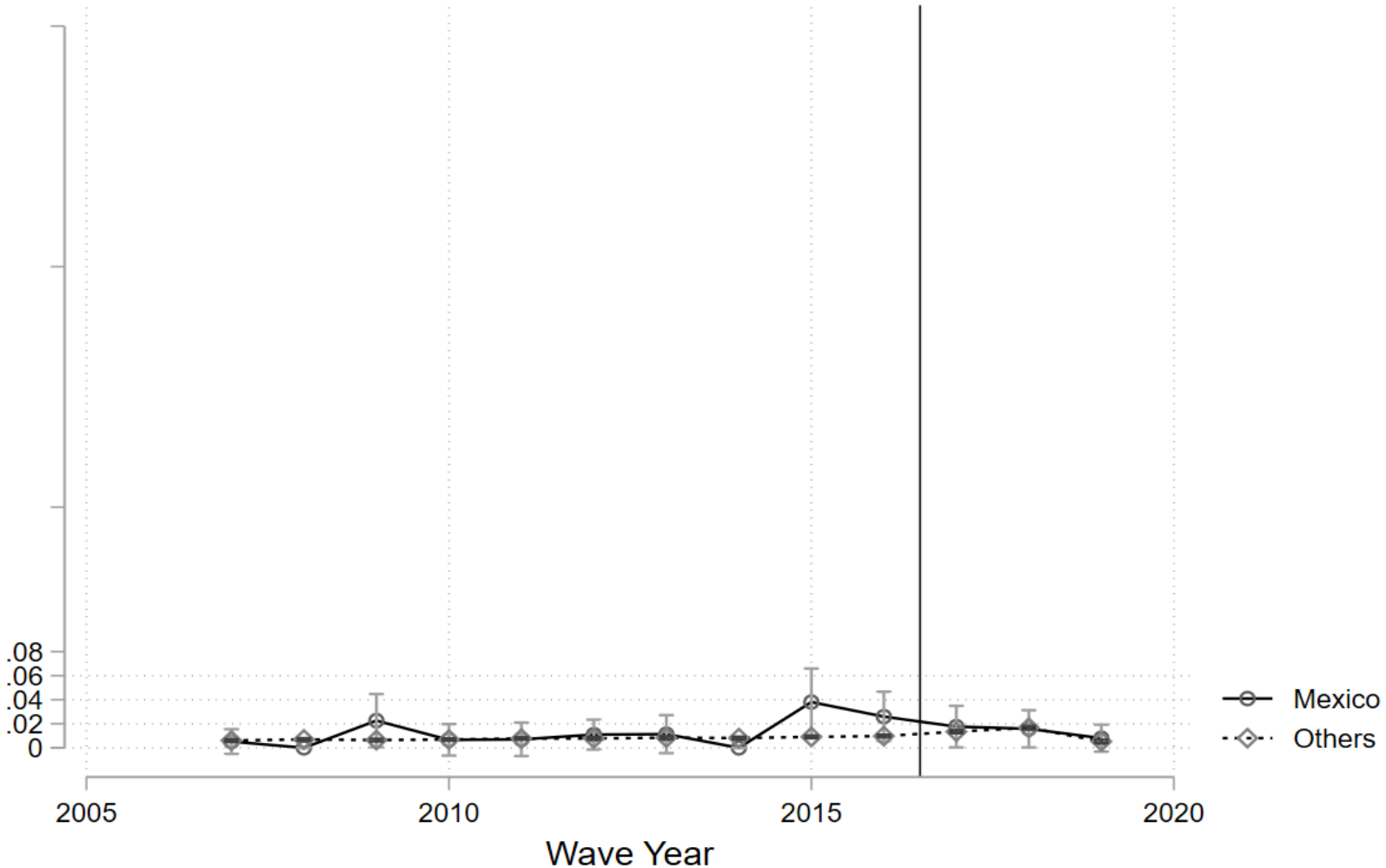
Diff-in-diff: intentions to move to US



Diff-in-diff: intentions to move to Canada



Diff-in-diff: intentions to move to China



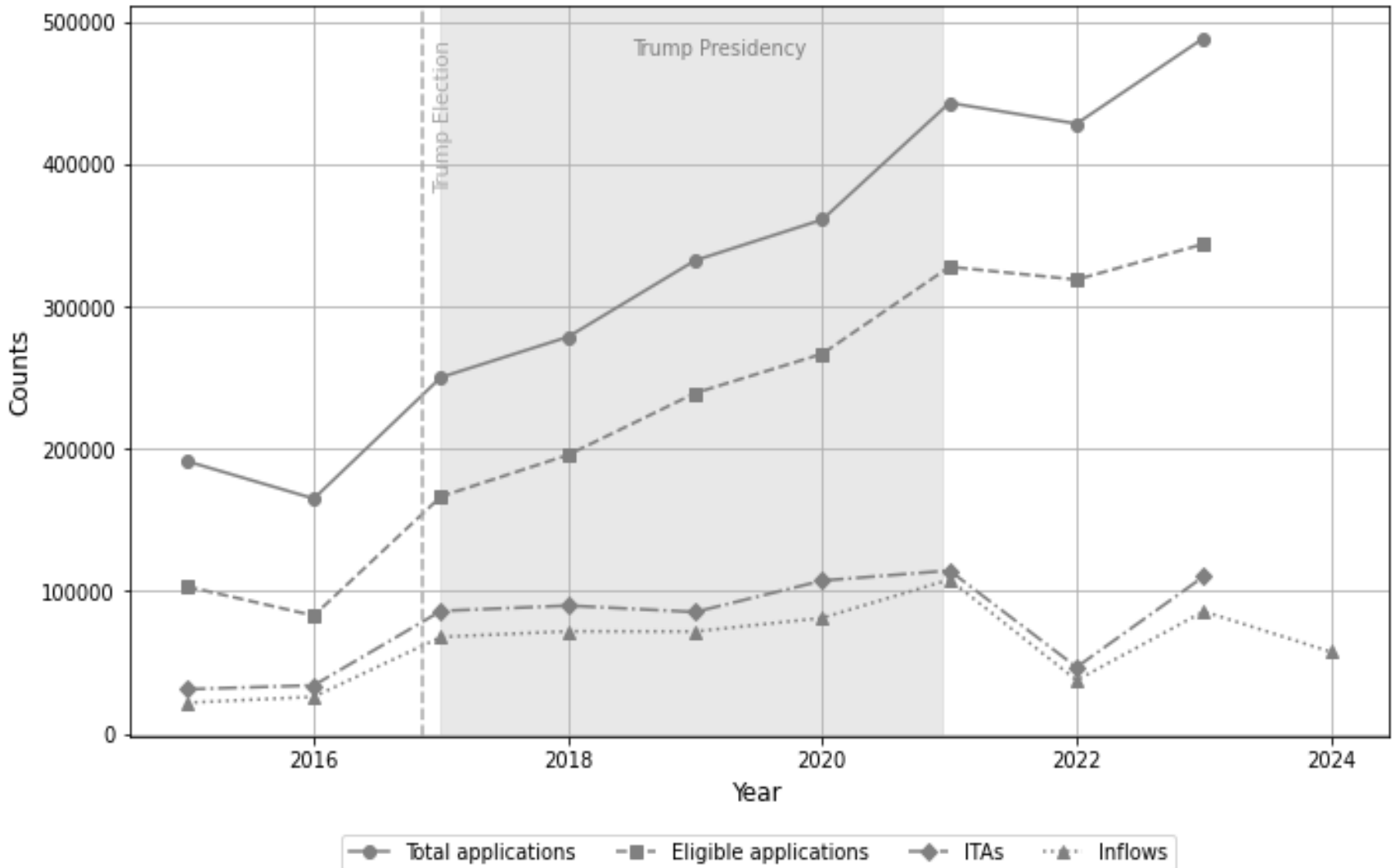
Diff-in-diff Estimates of Multinomial Logit.

Destination	(1) US	(2) Canada	(3) UK	(4) Australia	(5) Spain	(6) Germany	(7) France
main							
Post	-0.295*	0.0653	-0.661***	-0.927***	-0.361*	1.052***	-0.497**
	(0.17)	(0.23)	(0.21)	(0.27)	(0.20)	(0.26)	(0.20)
Mexico	1.091***	0.490***	-1.380***	-1.266***	0.663***	-0.0853	-0.417***
	(0.08)	(0.07)	(0.10)	(0.11)	(0.14)	(0.09)	(0.13)
Post × Mexico	-0.441***	0.839***	0.294***	0.188**	-0.212**	-0.406***	0.264***
	(0.07)	(0.08)	(0.09)	(0.08)	(0.10)	(0.10)	(0.07)
Constant	-1.068***	-2.826***	-2.069***	-3.313***	-2.579***	-3.026***	-2.675***
	(0.12)	(0.17)	(0.13)	(0.20)	(0.26)	(0.22)	(0.19)
N	342,172	342,172	342,172	342,172	342,172	342,172	342,172

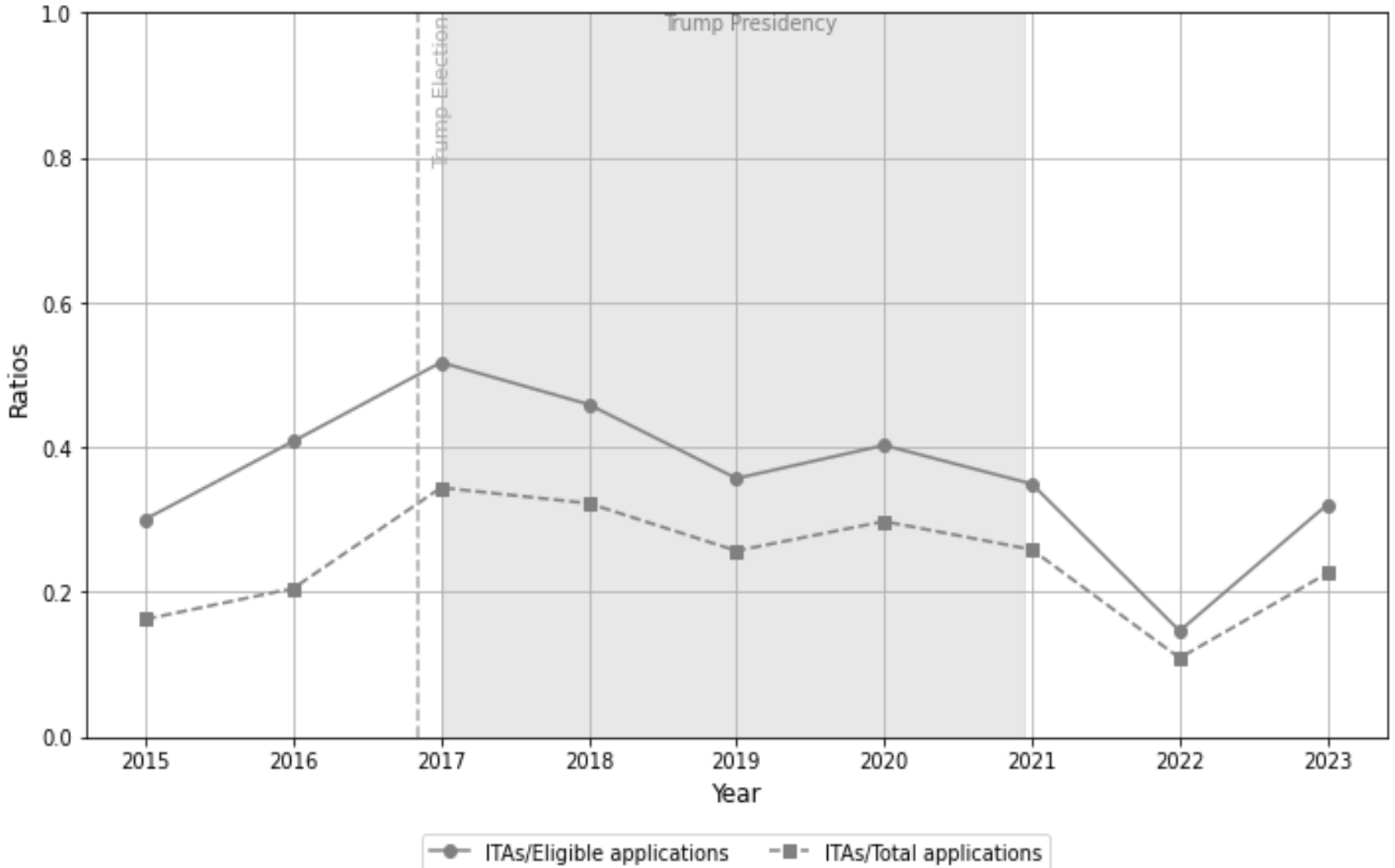
Proxying immmigration pressures: Canada after 2016 election

- Immigration pressures difficult to observe and measure. Reason: increase in intentions can be offset or mitigated by many factors (immigration policies, rise in migration costs, measurement problems).
- We report indirect evidence of rise in immigration pressures in Canada after the 2016 election for skilled immigrants (Entry express system of permanent skilled immigration), unskilled immigrants (US-Canada border apprehensions, asylum claimants).
- Immigration pressures induce reaction of immigration authorities that mitigate/offset impact on observed flows (e.g. imilicit quota).

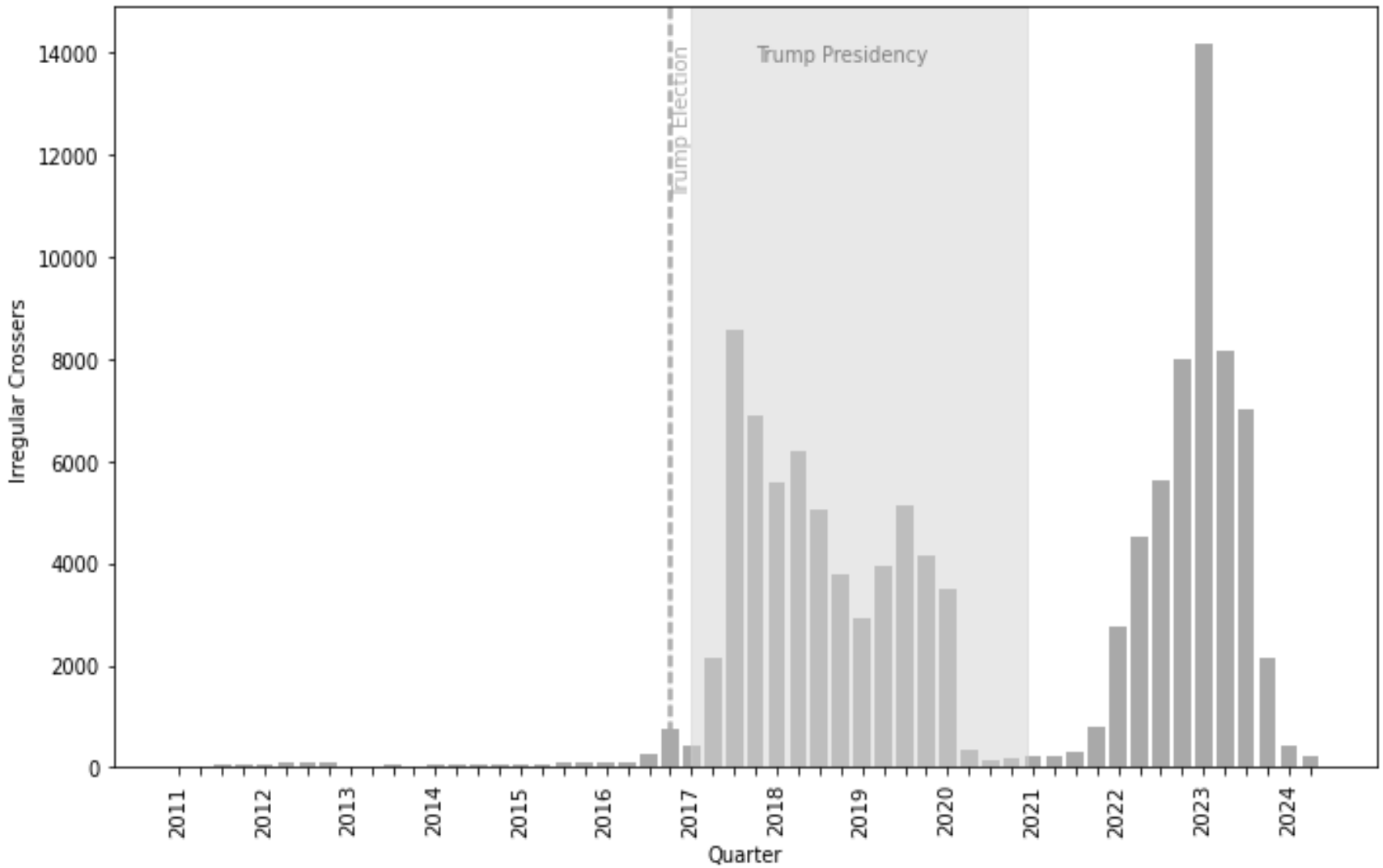
Skilled immigrants: applications



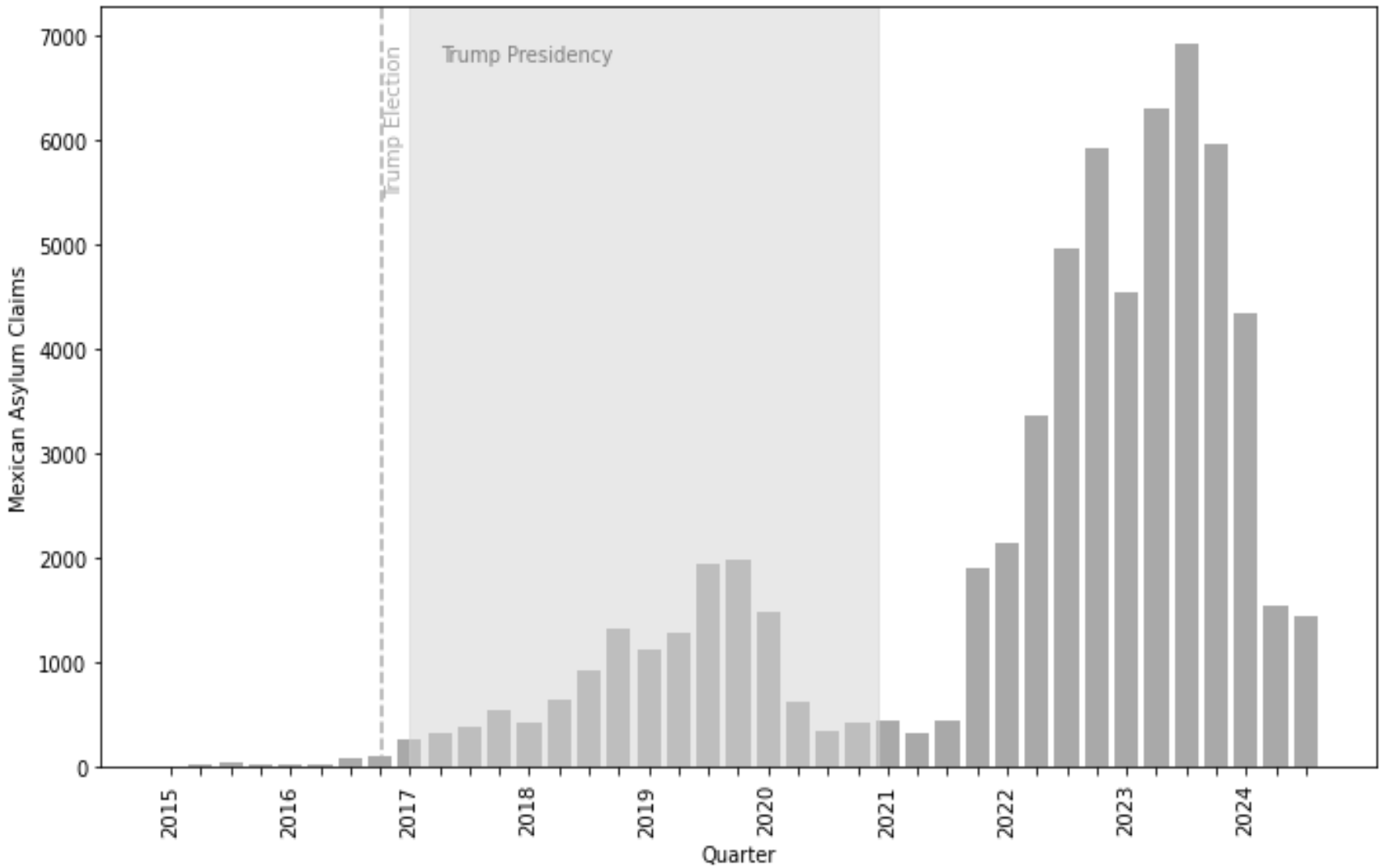
Skilled immigrants: immigration policy



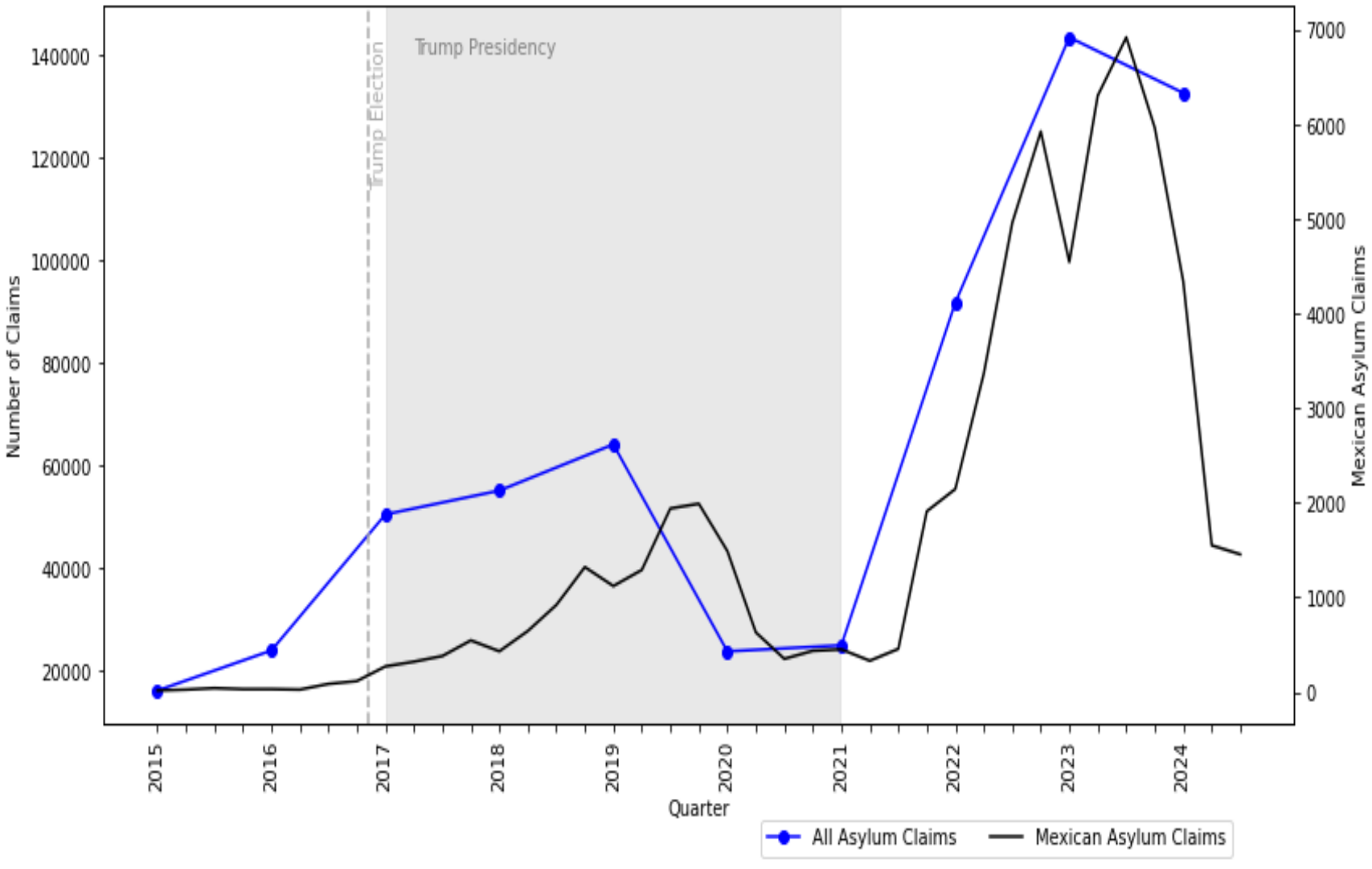
unskilled immigrants: irregular border crossers



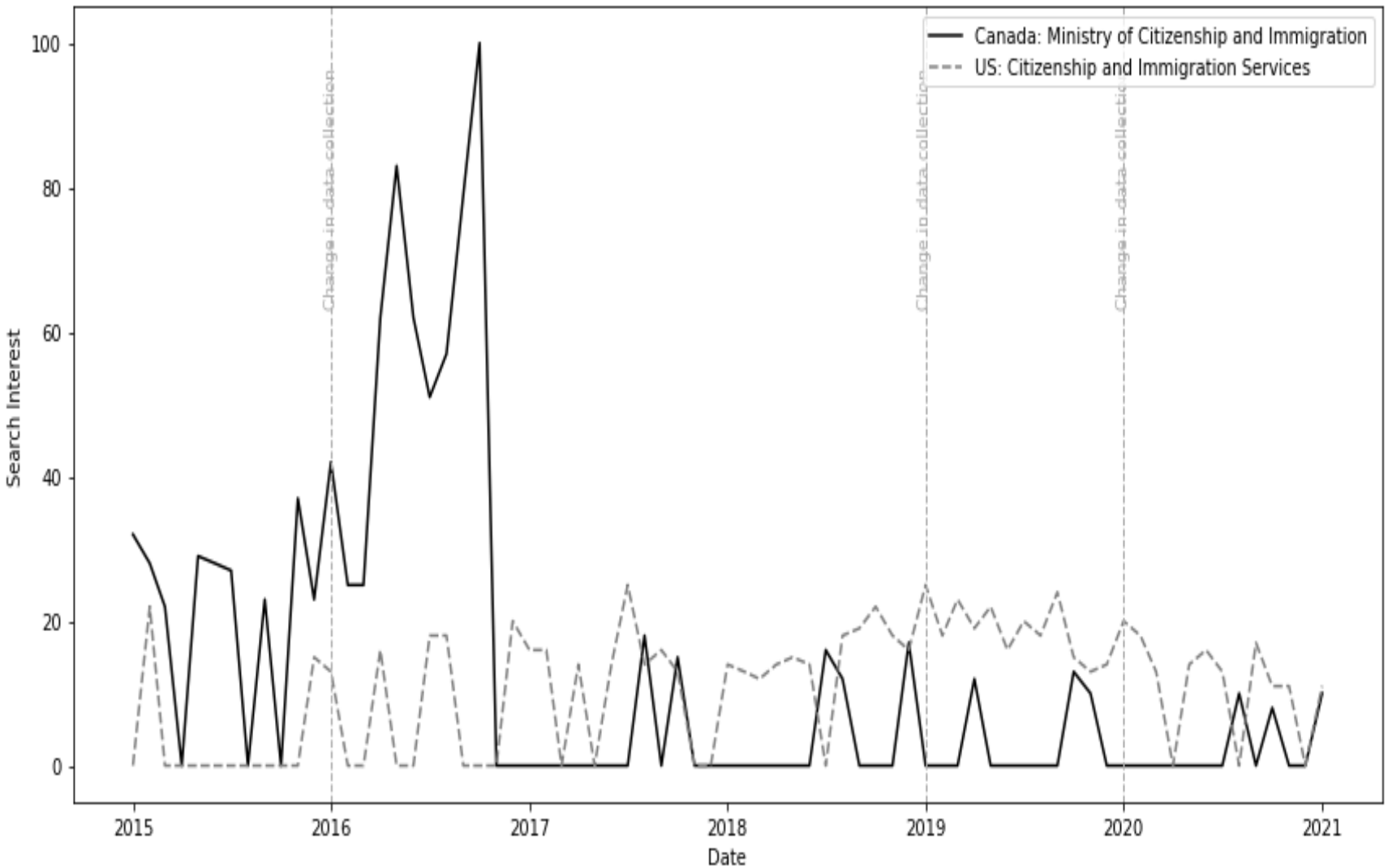
unskilled immigrants: asylum claimants from Mexico



unskilled immigrants: asylum claimants



immigration intentions: google trends



Estimates across Models: Domestic Utilities

	(1)	(2)	(3)	(4)
		All respondents		Potential movers
	ML	NL	CNL	ML
	Utility of staying in the domestic location (V_{0n})			
Low-skilled (LS)	15***	1.93***	11.2***	
	(0.584)	(0.185)	(0.585)	
Medium-skilled (MS)	15.1***	1.69***	10.9***	
	(0.392)	(0.159)	(0.539)	
High-skilled (HS)	15***	1.27***	10.1***	
	(0.578)	(0.191)	(0.636)	
Male	-0.179***	-0.181***	-0.178***	
	(0.0537)	(0.0535)	(0.0538)	
Single	-0.236**	-0.233**	-0.238**	
	(0.0652)	(0.0648)	(0.0652)	
Network × LS	-0.596***	-0.603***	-0.594***	
	(0.134)	(0.133)	(0.134)	
Network × MS	-0.489***	-0.502***	-0.485***	
	(0.0684)	(0.068)	(0.0684)	
Network × HS	-0.327**	-0.331**	-0.319**	
	(0.147)	(0.147)	(0.147)	
Age under 65	0.0225***	0.0227***	0.0224***	
	(0.00249)	(0.00248)	(0.00249)	
Age over 65	0.0567***	0.0555***	0.0567***	
	(0.0182)	(0.018)	(0.0182)	
Log of income at origin	-0.0451	-0.0531	-0.0444	
	(0.0335)	(0.0333)	(0.0335)	
Log-likelihood	-9,380.25	-9,331.42	-9,260.97	-4,811.71
Observations	10,081	10,081	10,081	1,821
Parameters	23	24	26	12

Estimates across Models: Foreign Utilities

	(1)	(2)	(3)	(4)
		All respondents		Potential movers
	ML	NL	CNL	ML
	Utility of moving to a foreign location (V_{jn})			
Log of distance	-0.134***	-0.0278***	-0.16***	-0.608***
Log GDP × LS	0.423***	0.0253***	0.332***	0.544***
Log GDP × MS	0.689***	0.0368***	0.439***	0.789***
Log GDP × HS	0.95***	0.049***	0.465***	1.05***
Log of diaspora × LS	0.271***	0.0106***	0.183***	0.226***
Log of diaspora × MS	0.224***	0.00837***	0.147***	0.178***
Log of diaspora × HS	0.164***	0.00555***	0.107***	0.118***
Log of population	0.534***	0.0292***	0.262***	0.627***
Disapproval of US leadership	-0.586***	-0.0555***	-0.497***	-1.2***
δ_{OECD}	0.0485	0.00556	1.93***	0.121
$\delta_{Schengen}$	0.304***	0.0235***	0.577***	0.508***
$\delta_{English}$	0.406***	0.0237***	0.177	0.512***
	Parameters of the nest structure (μ_m)			
$\mu_{Foreign}$		21.4***		
μ_{OECD}			2.31***	
$\mu_{Schengen}$			3.41***	
$\mu_{English}$			1.29***	
Log-likelihood	-9,380.25	-9,331.42	-9,260.97	-4,811.71
Observations	10,081	10,081	10,081	1,821
Parameters	23	24	26	12

Main insights

- Estimates tend to support findings of the migration literature.
- Role for education, gender, age and marital status on probability of emigration. Ambiguous role for income at origin.
- In choosing optimal foreign destination, role for income at destination, networks, distance. Sensitivities depend on education level.
- Countries with OECD status, English and within Schengen area share more similarities and are closer substitutes
- Strong impact of US leadership disapproval on US attractiveness $\rightarrow$ we leverage this as our main simulation mechanism of Trump reelection.

4 scenarios

- We consider 4 scenarios regarding Trump reelection.
- First three scenarios are based on **predicted variations in disapproval** about US leadership by Mexican residents.
- First (base) scenario: increase in probability of disapproving is homogenous across individuals. Disapproval reflects those observed during first mandate (about 75%)
- Second (gender) scenario: increase is higher for women
- Third (skill) scenario: increase is higher for educated individuals; this fits the evidence.
- Fourth scenario: we simulate a **complete closure of US borders** for Mexican respondents. Replicate counterfactual scenario in Beine, Bierlaire and Docquier (2023).
- Not pure science fiction (Inspired by the Jan 27 2017 Executive Order 13769 of Trump Administration, which prevented entries for 7 countries).

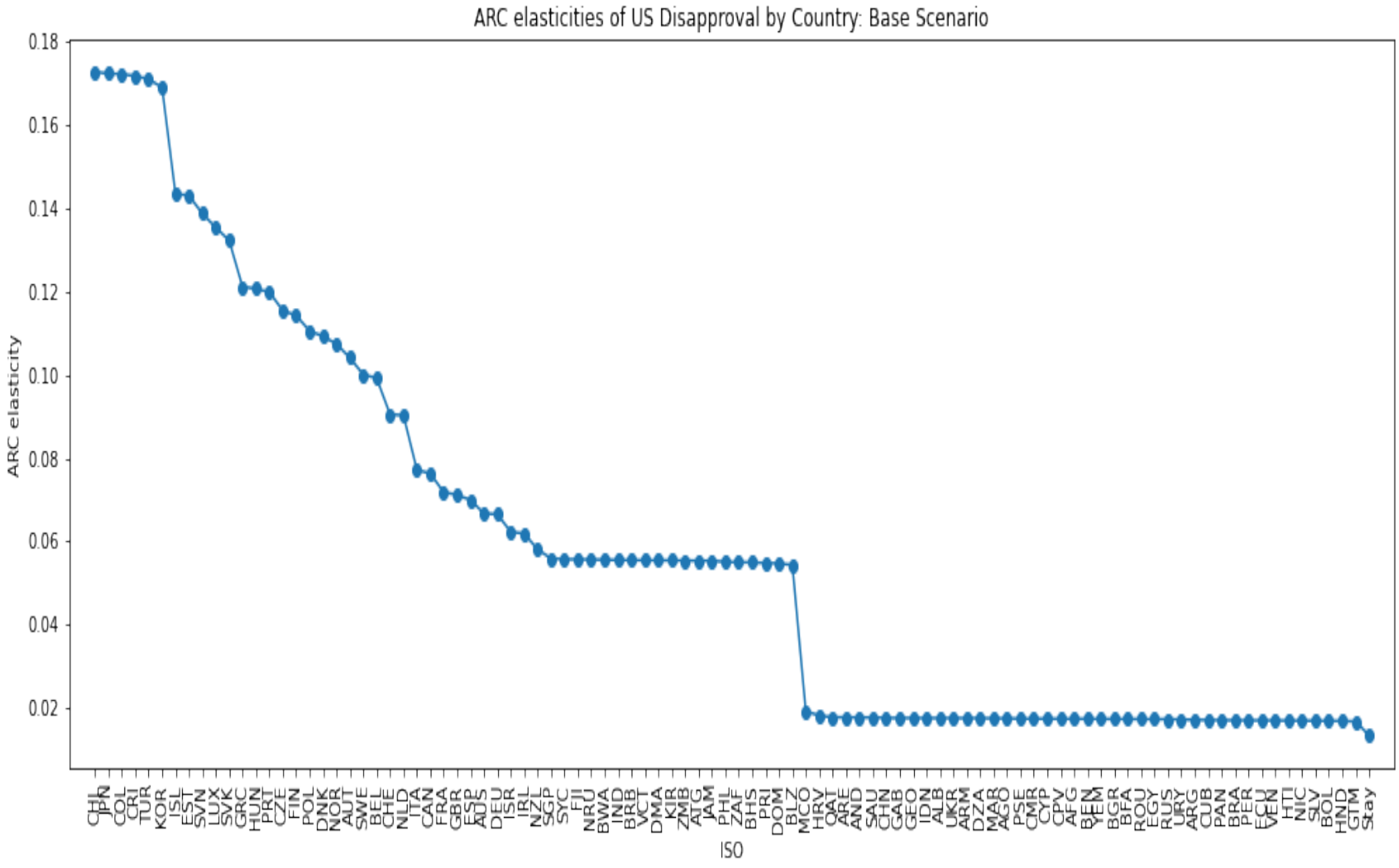
Probability of disapproval (Gallup)

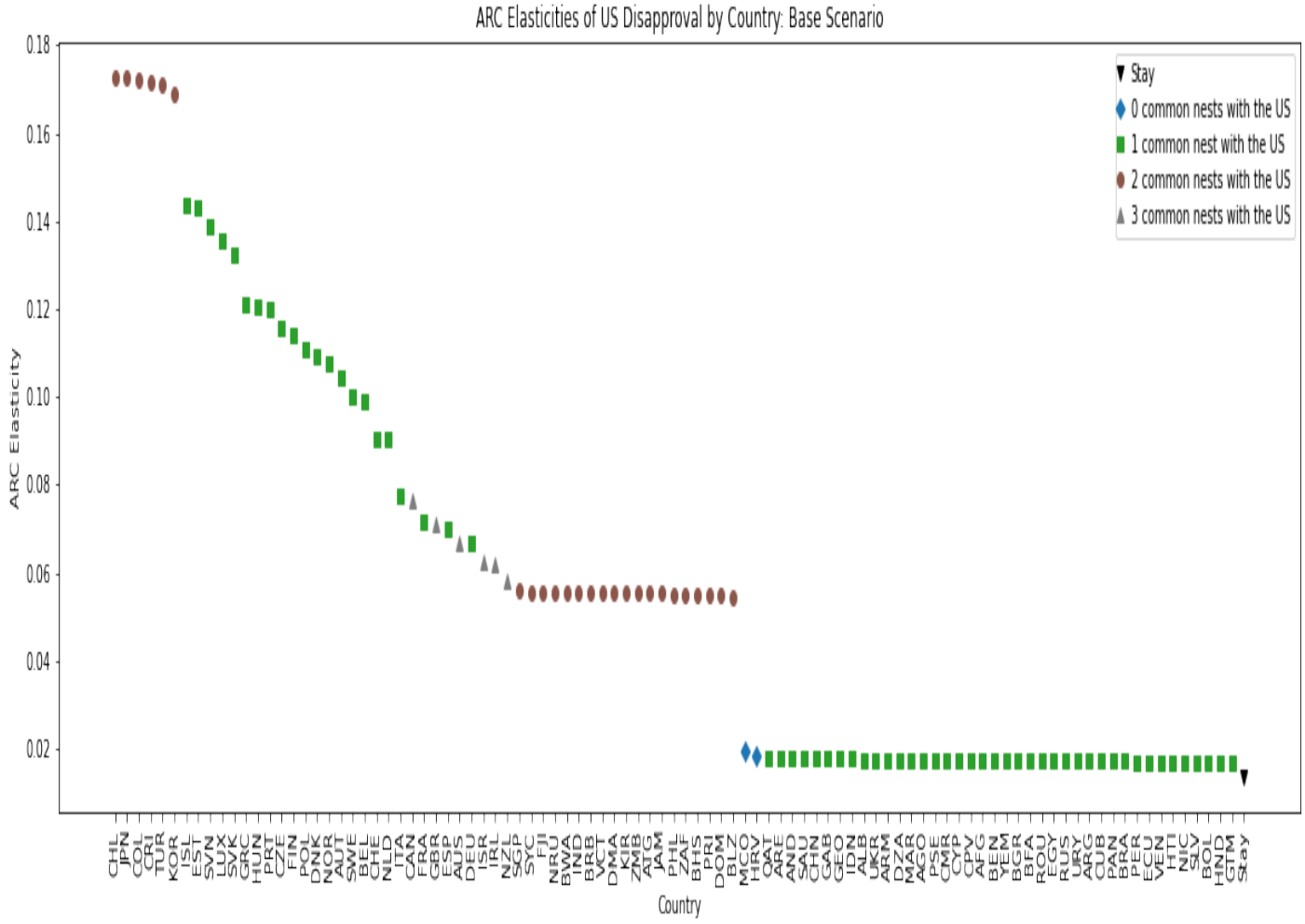
	Before 2017		After 2017	
	Value	Rob. t-test	Value	Rob. t-test
Constant	-0.983	-16.2	0.812	9.65
$\beta_{\text{Mid Sk}}$	0.273	4.3	0.405	4.17
$\beta_{\text{High Sk}}$	0.36	3.63	0.341	2.02
β_{income}	-0.0915	-2.79	0.148	2.8
β_{male}	0.0421	0.817	-0.289	-3.2

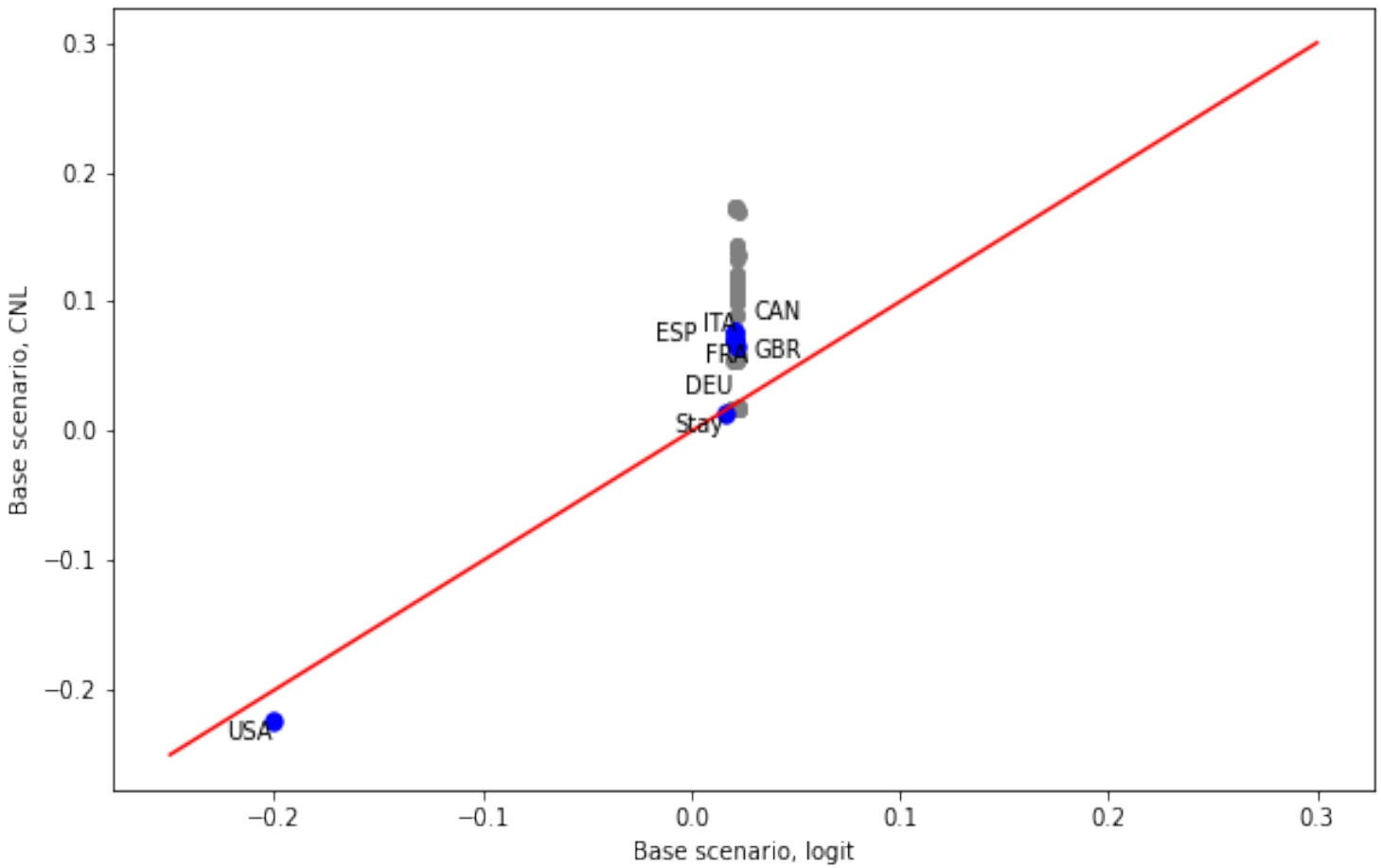
Table: **Binary Logit Model Results on Disapproval**

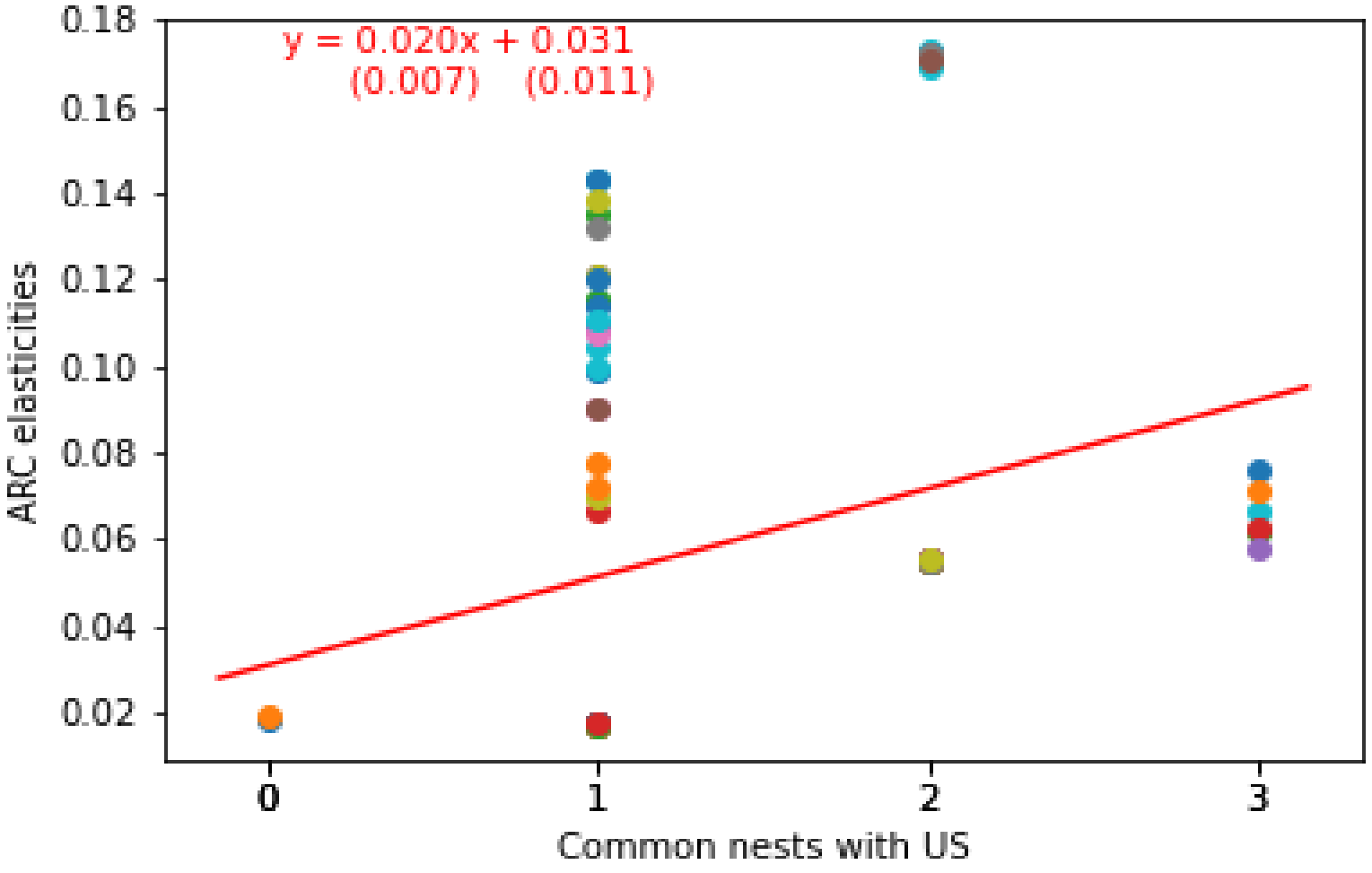
Procedure for simulation

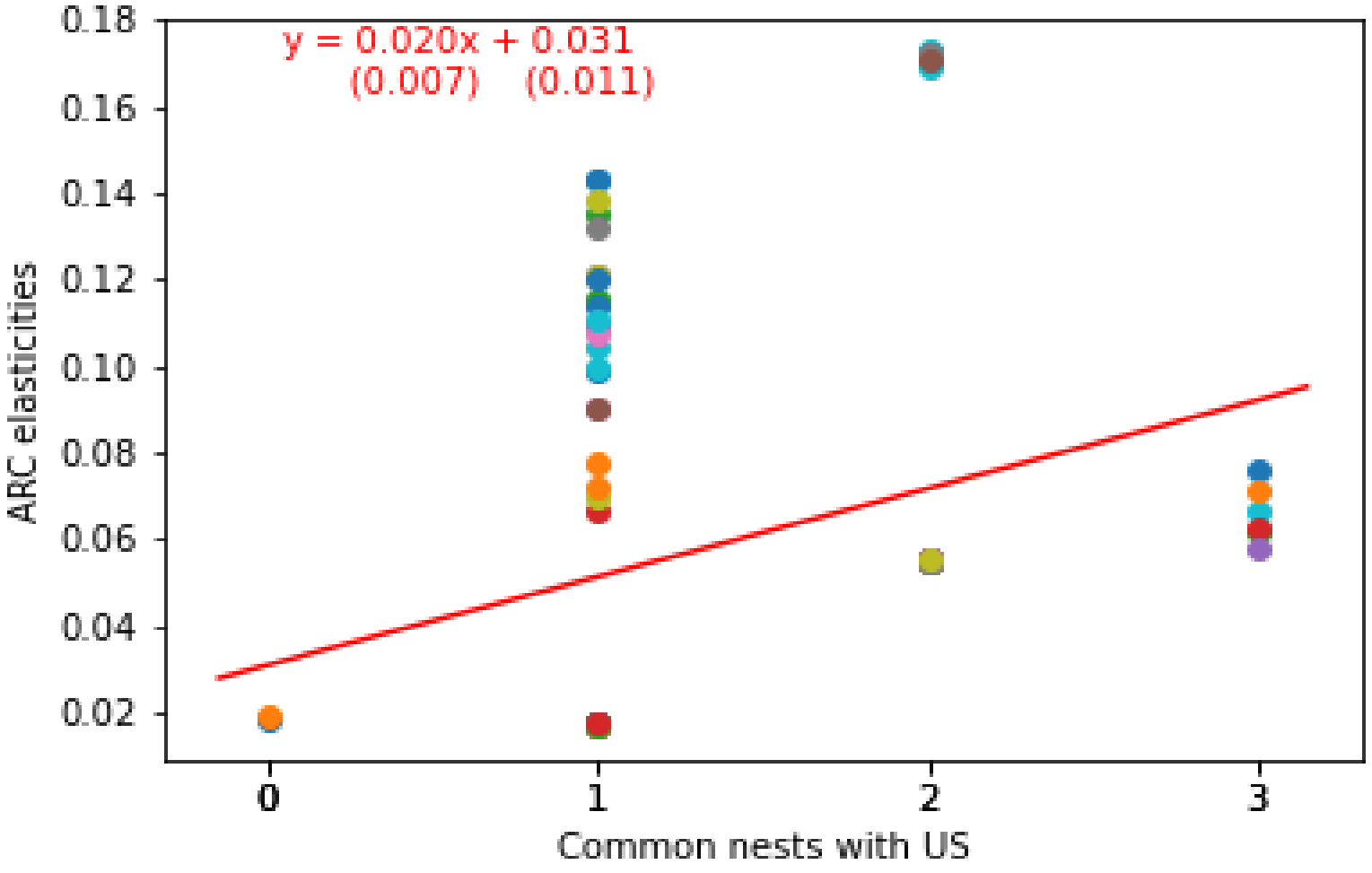
- For each scenario and for each individual, we draw a value for $dis_{US,n}$ after Trump election based on Probability of disapproval for individual of type n. $\rightarrow$ This allows to compute $\Delta dis_{US,n}$, i.e. variation of disapproval between after and before (2016).
- Based on estimates, we compute ARC elasticities for each location $\rightarrow$ compute $\Delta Prob_{jn}$, variation in the probability of choosing each destination. We compute the number of new intended migrants for each location by summing up probabilities.
- (Aggregate) Arc elasticities : $E^{P_j}_{Dis_{US}} = \frac{P_j^{Dis_{US}^{scenario}} - P_j^{Dis_{US}}}{P_j^{Dis_{US}}}$
- Using adult population data for Mexico, we extrapolate findings for our sample to Mexican population to get simulated immigration pressures for each destination.

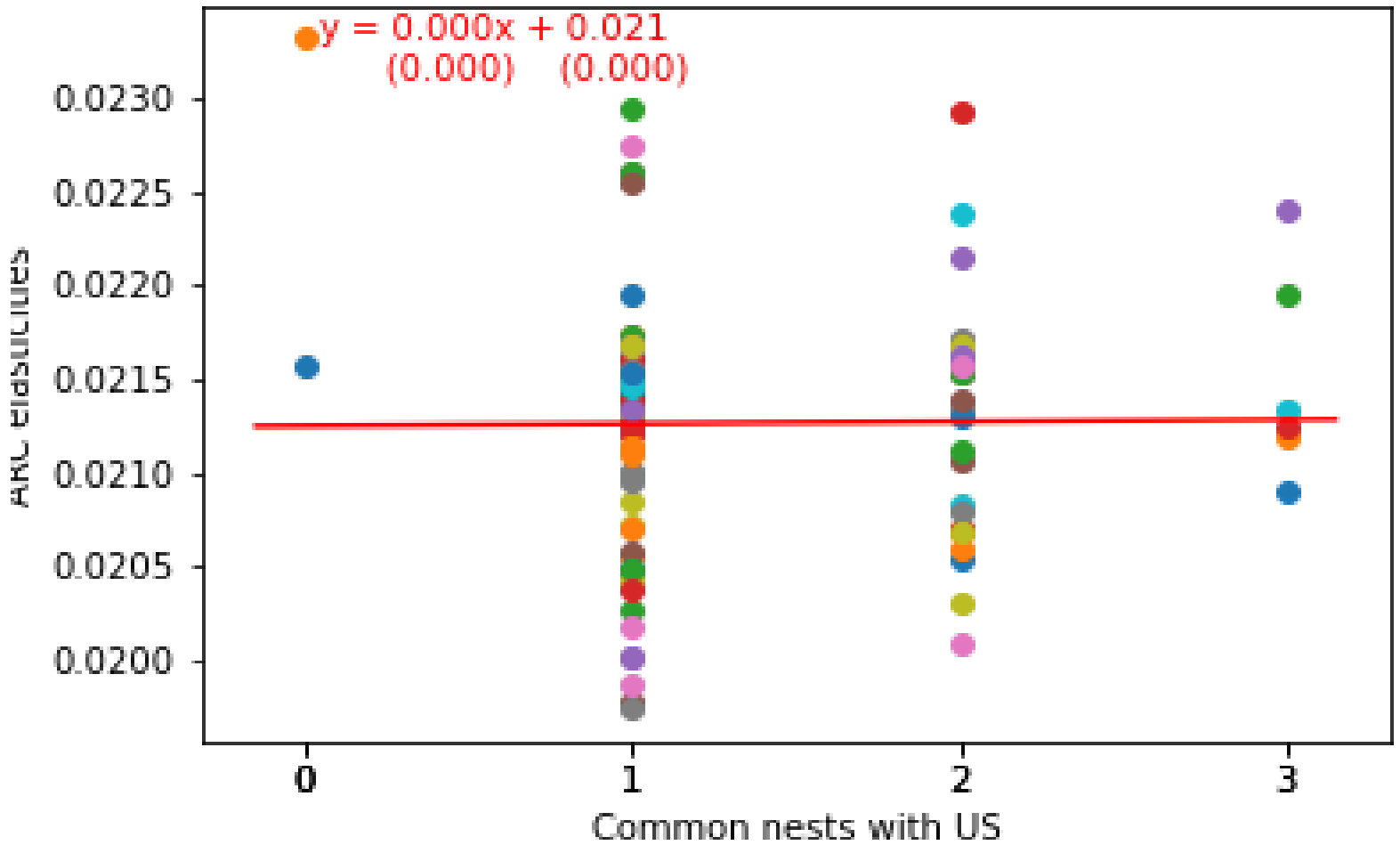

ARC elasticities of US Disapproval by Country: Base Scenario
ARC elasticity
0.18
0.16
0.14
0.12
0.10
0.08
0.06
0.04
0.02
ISO
CHL JPN COL CRI TUR KOR ISL EST SVN LUX SVK GRC HUN PRT CZE FIN POL DNK NOR AUT SWE BEL CHE NLD ITA CAN FRA GBR ESP AUS DEU ISR IRL NZL SGP SYC FJI NRU BWA IND BRB VCT DMA KIR ZMB ATG JAM PHL ZAF BHS PRI DOM BLZ MCO HRV QAT ARE AND SAU CHN GAB GEO IDN ALB UKR ARM DZA MAR AGO PSE CMR CYP CPV AFG BEN YEM BGR BFA ROU EGY RUS URY ARG CUB PAN BRA PER ECU VEN HTI NIC SLV BOL HND GTM Stay


ARC Elasticities of US Disapproval by Country: Base Scenario
ARC Elasticity
0.18
0.16
0.14
0.12
0.10
0.08
0.06
0.04
0.02
Stay
0 common nests with the US
1 common nest with the US
2 common nests with the US
3 common nests with the US
CHL JPN COL CRI TUR KOR ISL EST SVN LVA SVK GRC HUN PRT CZE FIN POL DNK NOR AUT SWE BEL CHE NLD ITA CAN FRA GBR ESP AUS DEU IRL NZL SGP SYC FJI NRU BWA IND BRB VCT DMA KNA ZMB ATG JAM PHL ZAF BHS PRI DOM BLZ MCO TTO QAT ARE AND SAU CHN GAB GEO IDN ALB LKA ARM DZA AGO MAR PSE CMR CYP CPV AFG BEN YEM BGR BFA ROU EGY RUS URY ARG CUB PAN BRA PER ECU VEN HTI NIC SLV BOL HND GTM Stay
Country


0.3
0.2
0.1
0.0
−0.1
−0.2
Base scenario, CNL
−0.2
−0.1
0.0
0.1
0.2
0.3
Base scenario, logit
ESP
ITA
CAN
FRA
GBR
DEU
Stay
USA


y = 0.020x + 0.031
(0.007) (0.011)
0.18
0.16
0.14
0.12
0.10
0.08
0.06
0.04
0.02
ARC elasticities
0
1
2
3
Common nests with US


y = 0.020x + 0.031
(0.007) (0.011)
0.18
0.16
0.14
0.12
0.10
0.08
0.06
0.04
0.02
ARC elasticities
0
1
2
3
Common nests with US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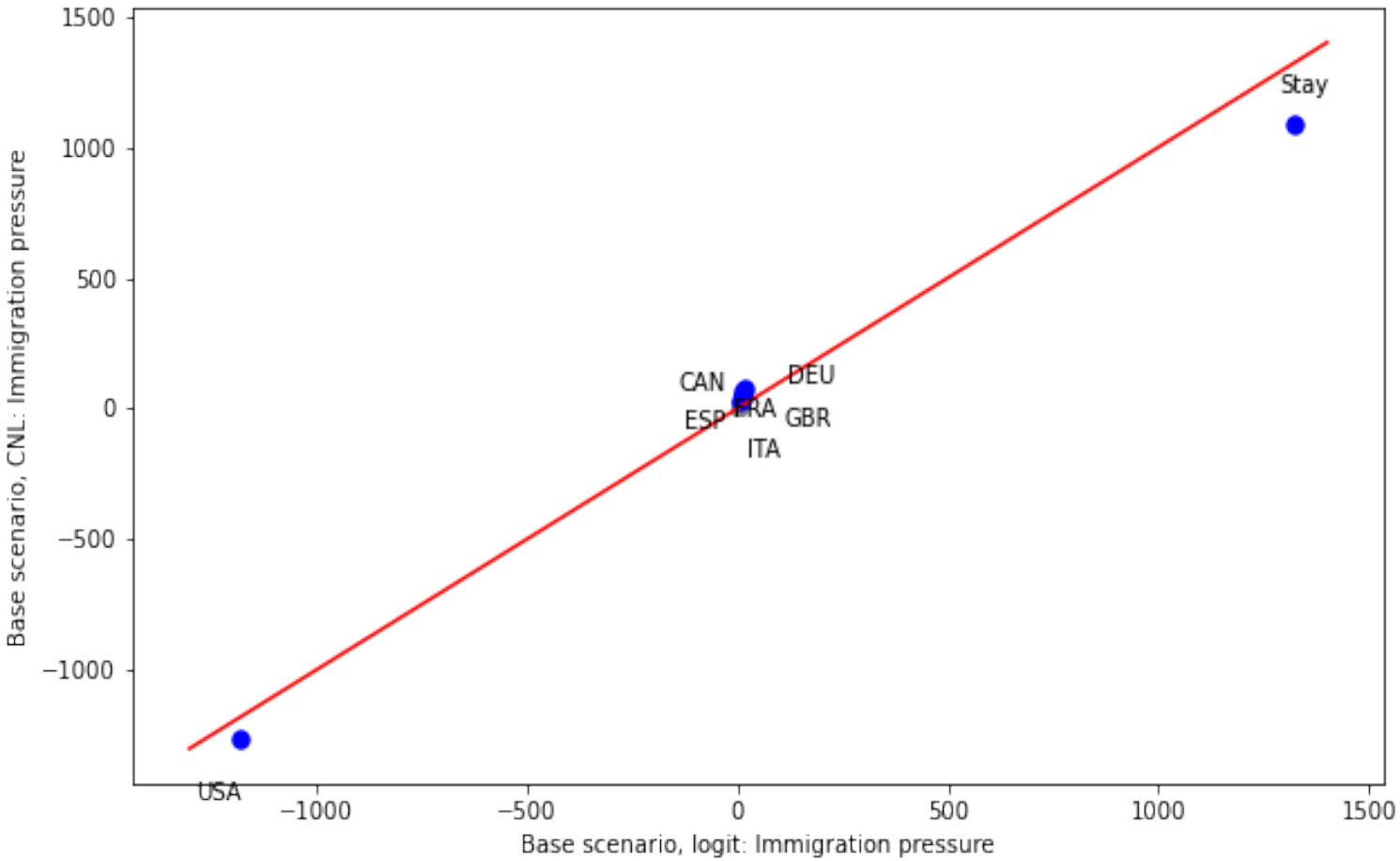
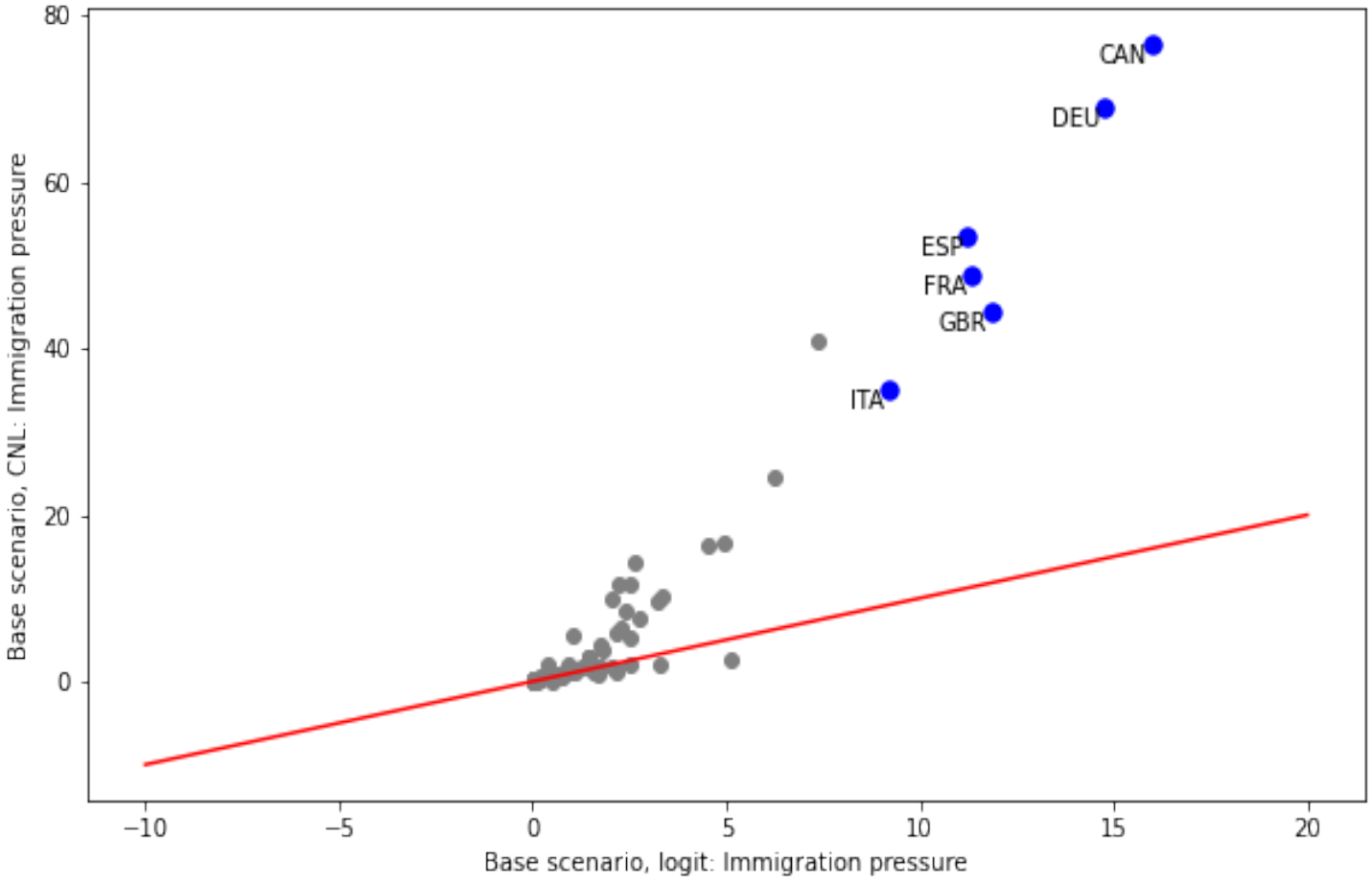
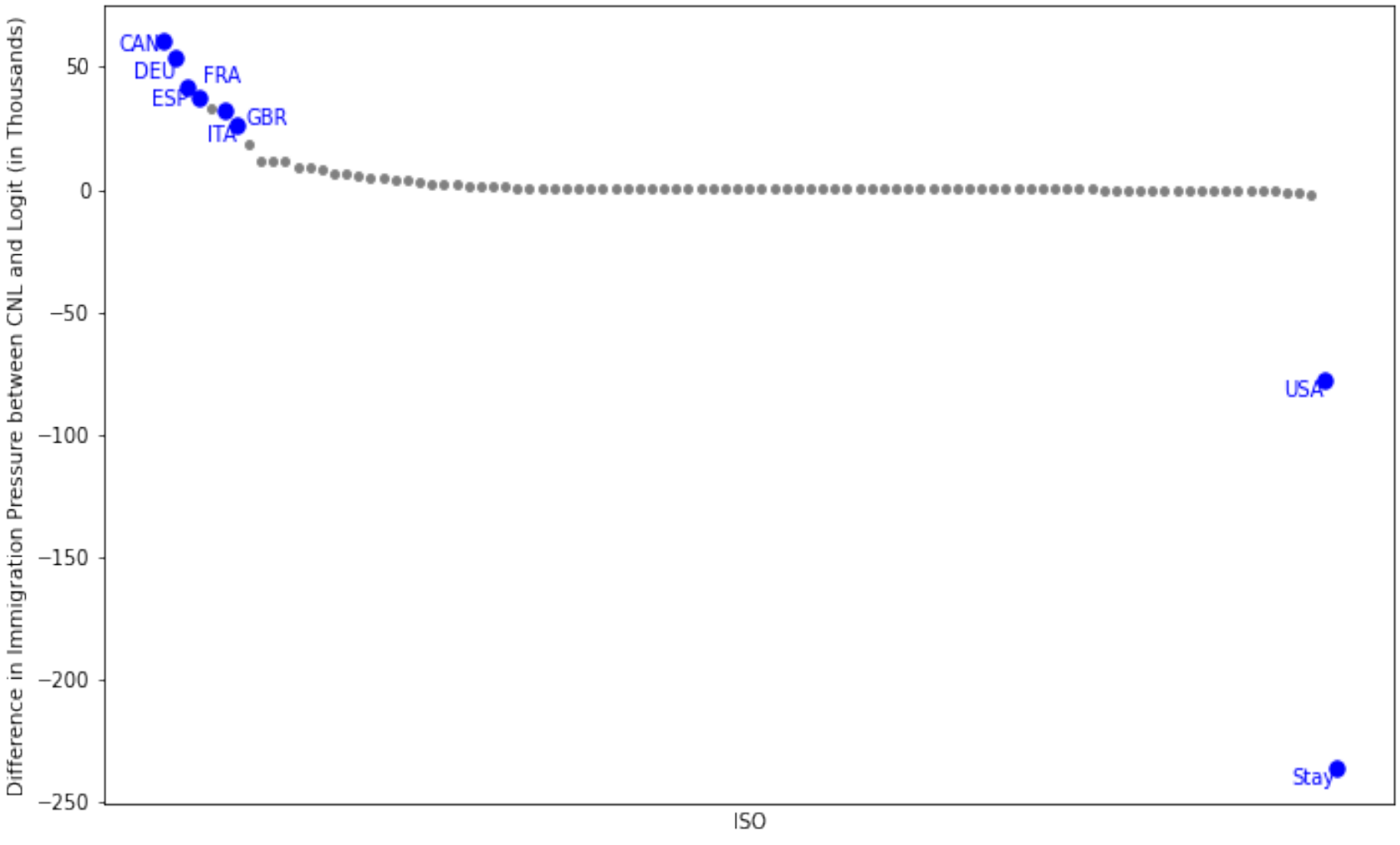
0.0220
0.0215
0.0210
0.0205
0.0200
0
1
2
3
Common nests with US

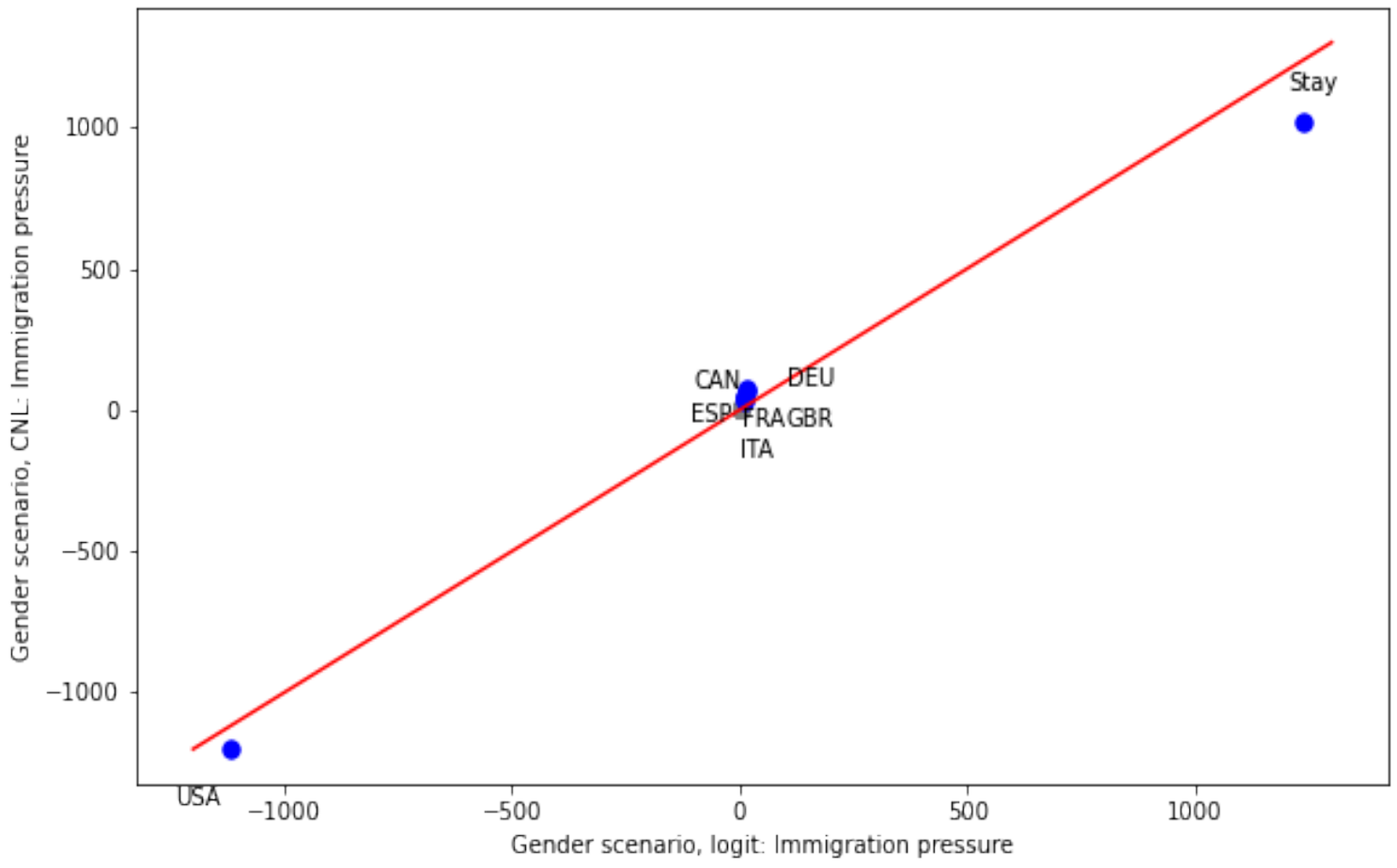

1500
1000
500
0
−500
−1000
Base scenario, CNL: Immigration pressure
Stay
CAN
DEU
ESP
FRA
GBR
ITA
USA
−1000
−500
0
500
1000
1500
Base scenario, logit: Immigration pressure

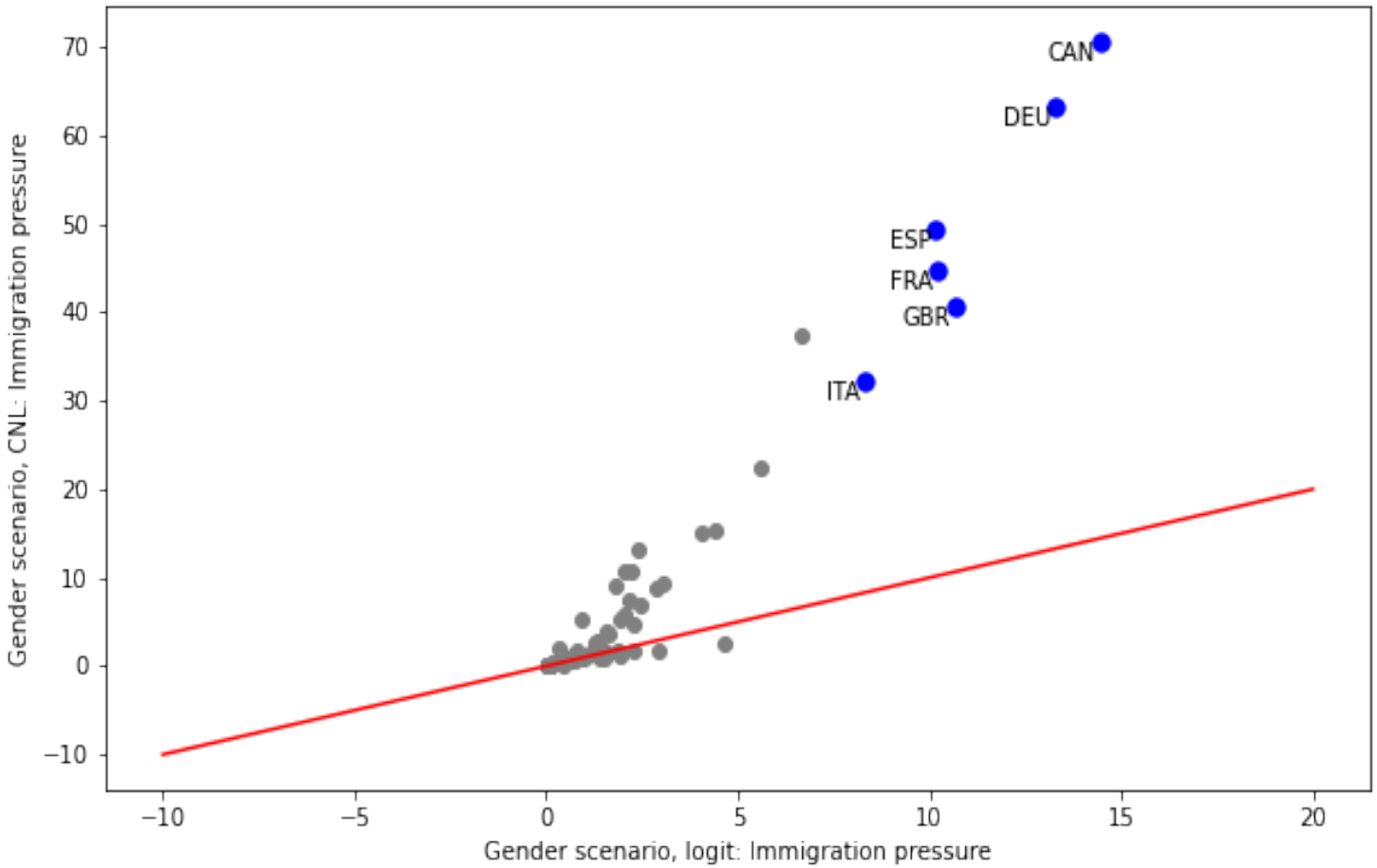

80
60
40
20
0
−10
−5
0
5
10
15
20
CAN
DEU
ESP
FRA
GBR
ITA
Base scenario, CNL: Immigration pressure
Base scenario, logit: Immigration pressure

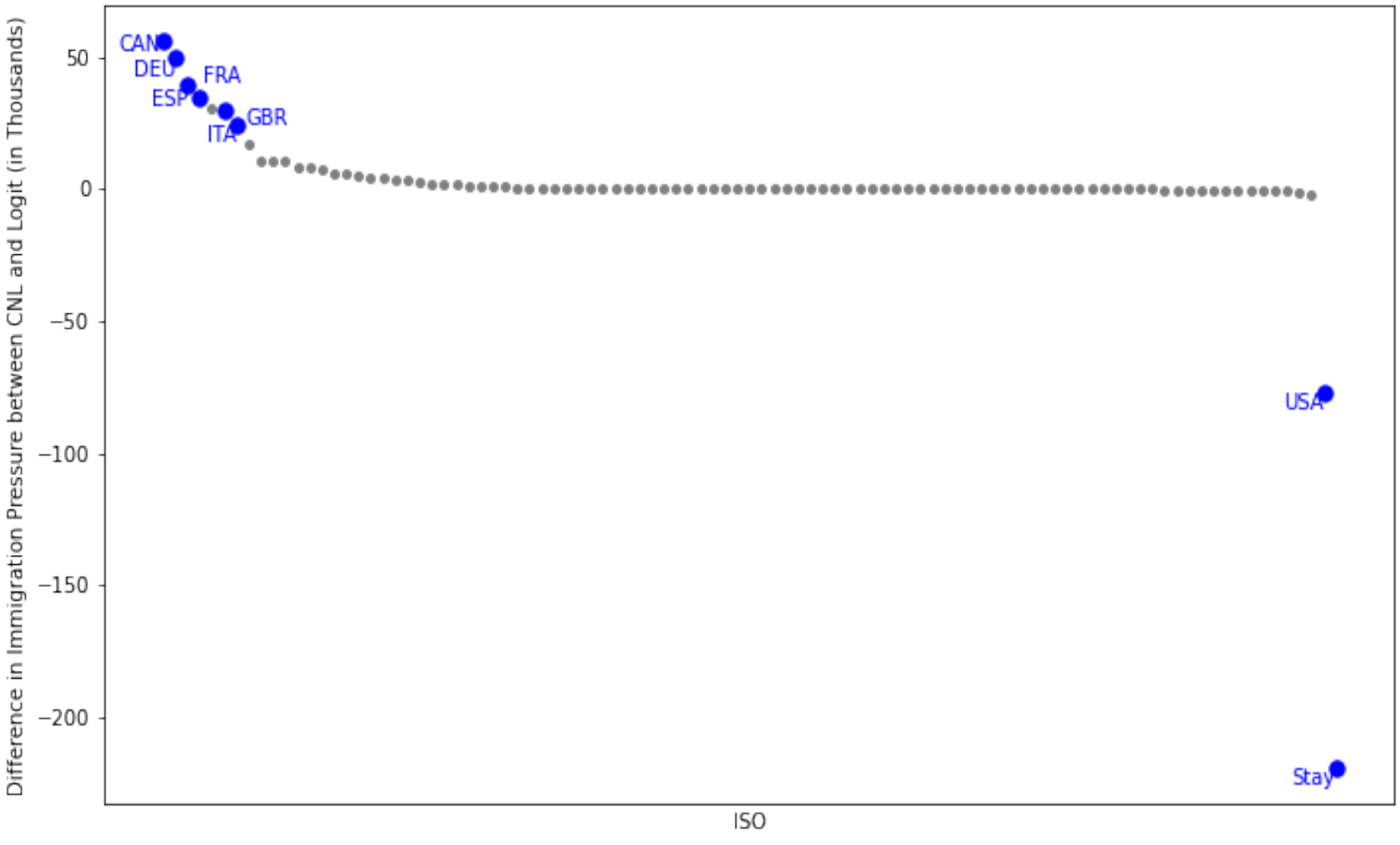

CAN
DEU
FRA
ESP
GBR
ITA
USA
Stay
50
0
−50
−100
−150
−200
−250
Difference in Immigration Pressure between CNL and Logit (in Thousands)
ISO

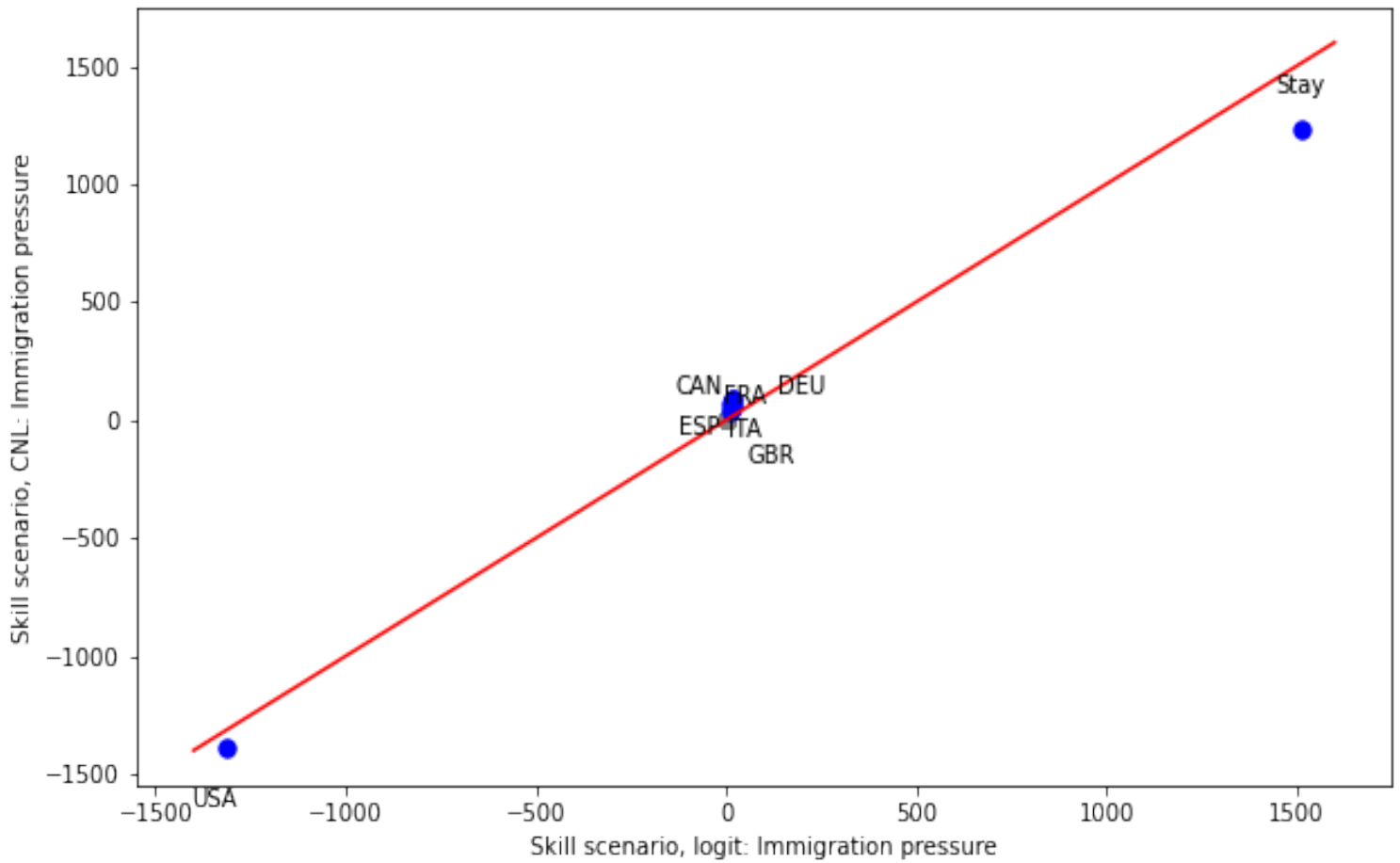
Immigration pressures from Mexico for main locations (base scenario)

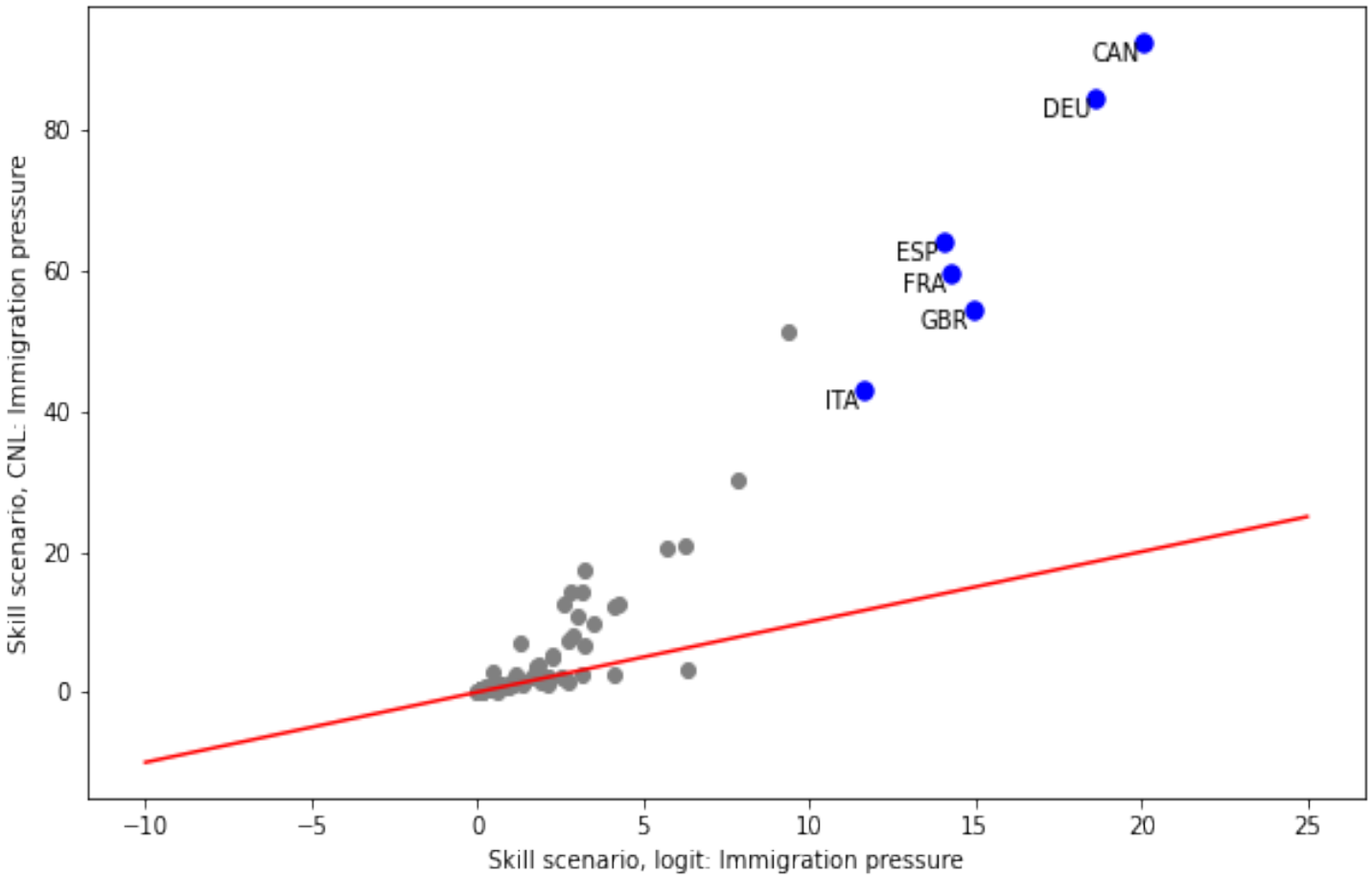
Country	CNL	ML
Canada	77000	16000
Germany	69000	14700
France	48700	11300
Spain	53000	11230
UK	44300	11800
Mexico	1083000	1320000
US	-1257000	-1179000

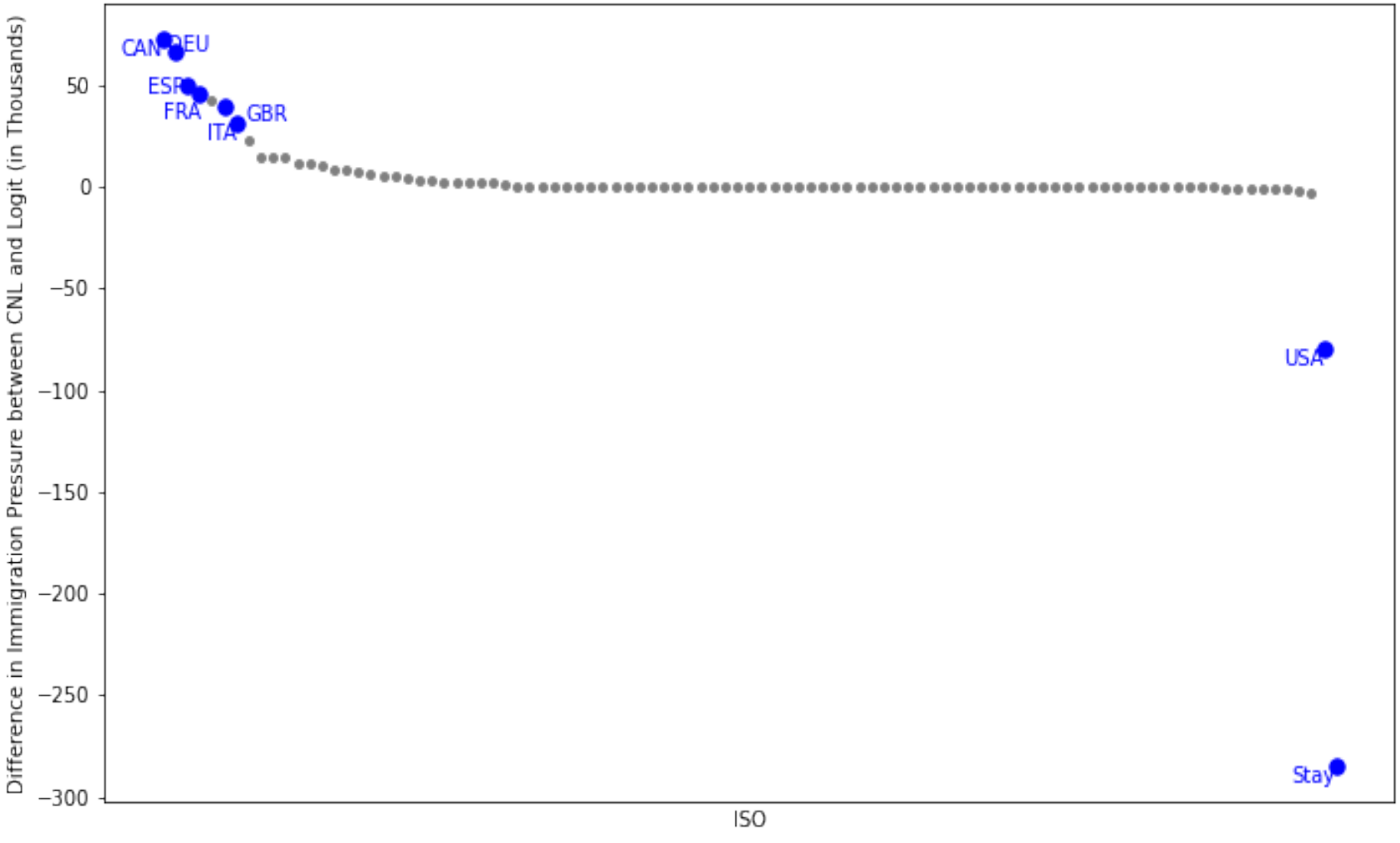

Stay
CAN
DEU
ESP
FRA
GBR
ITA
USA
1000
500
0
−500
−1000
−1000
−500
0
500
1000
Gender scenario, CNL: Immigration pressure
Gender scenario, logit: Immigration pressure


CAN
DEU
ESP
FRA
GBR
ITA
70
60
50
40
30
20
10
0
−10
−10
−5
0
5
10
15
20
Gender scenario, CNL: Immigration pressure
Gender scenario, logit: Immigration pressure

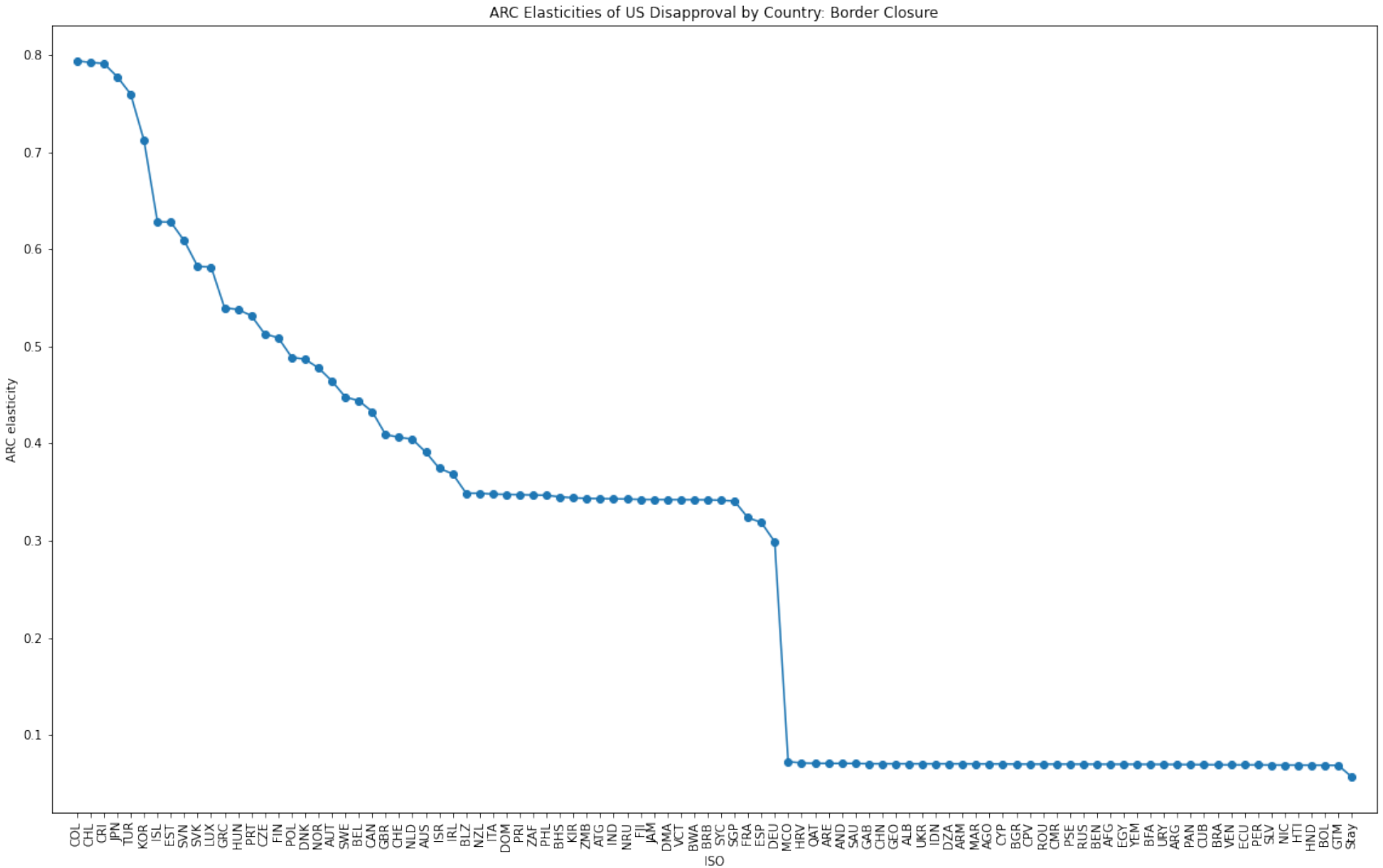

CAN
DEU
FRA
ESP
GBR
ITA
USA
Stay
50
0
−50
−100
−150
−200
Difference in Immigration Pressure between CNL and Logit (in Thousands)
ISO

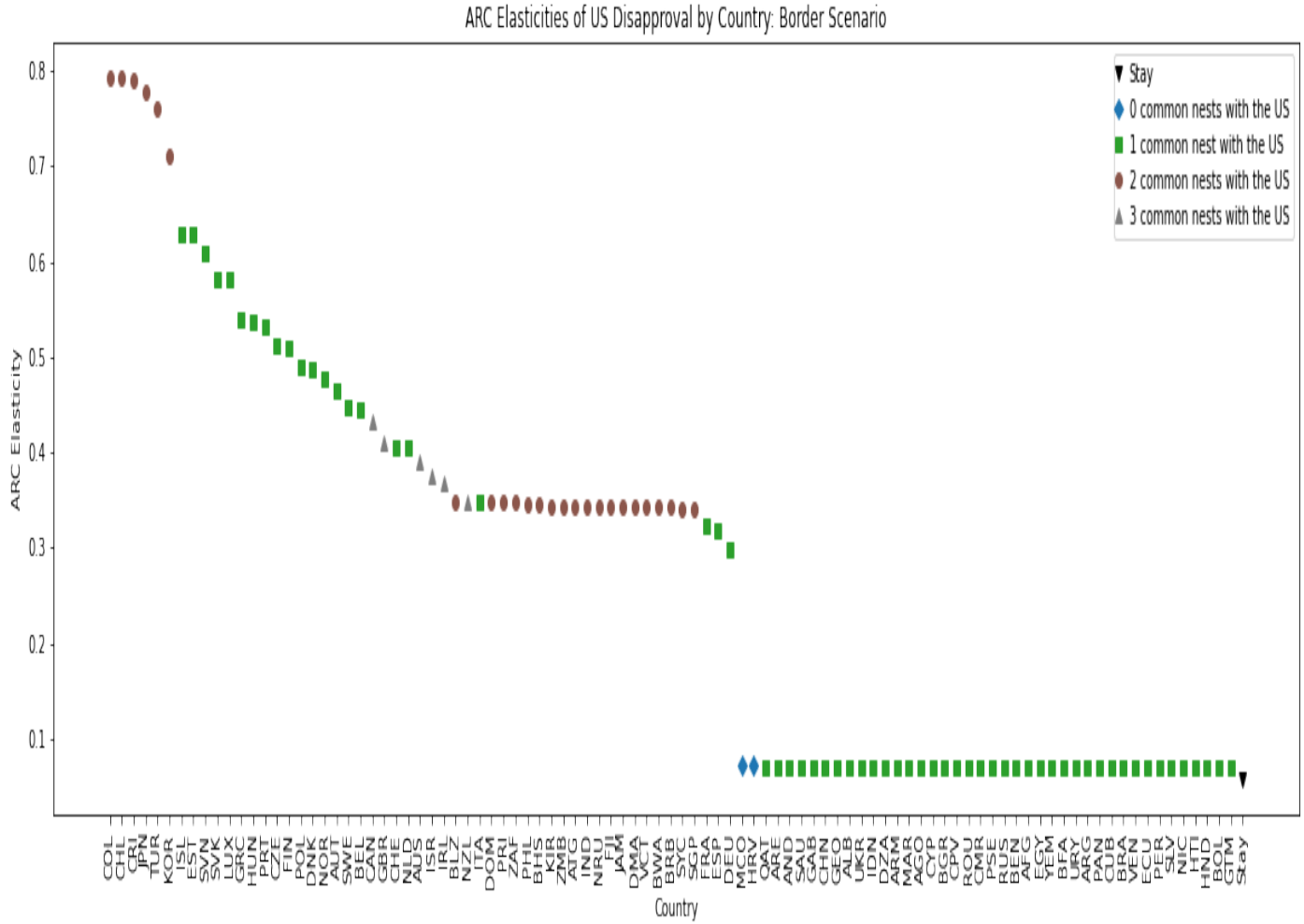

Stay
CAN
FRA
DEU
ESP
ITA
GBR
USA
1500
1000
500
0
−500
−1000
−1500
−1500
−1000
−500
0
500
1000
1500
Skill scenario, CNL: Immigration pressure
Skill scenario, logit: Immigration pressure

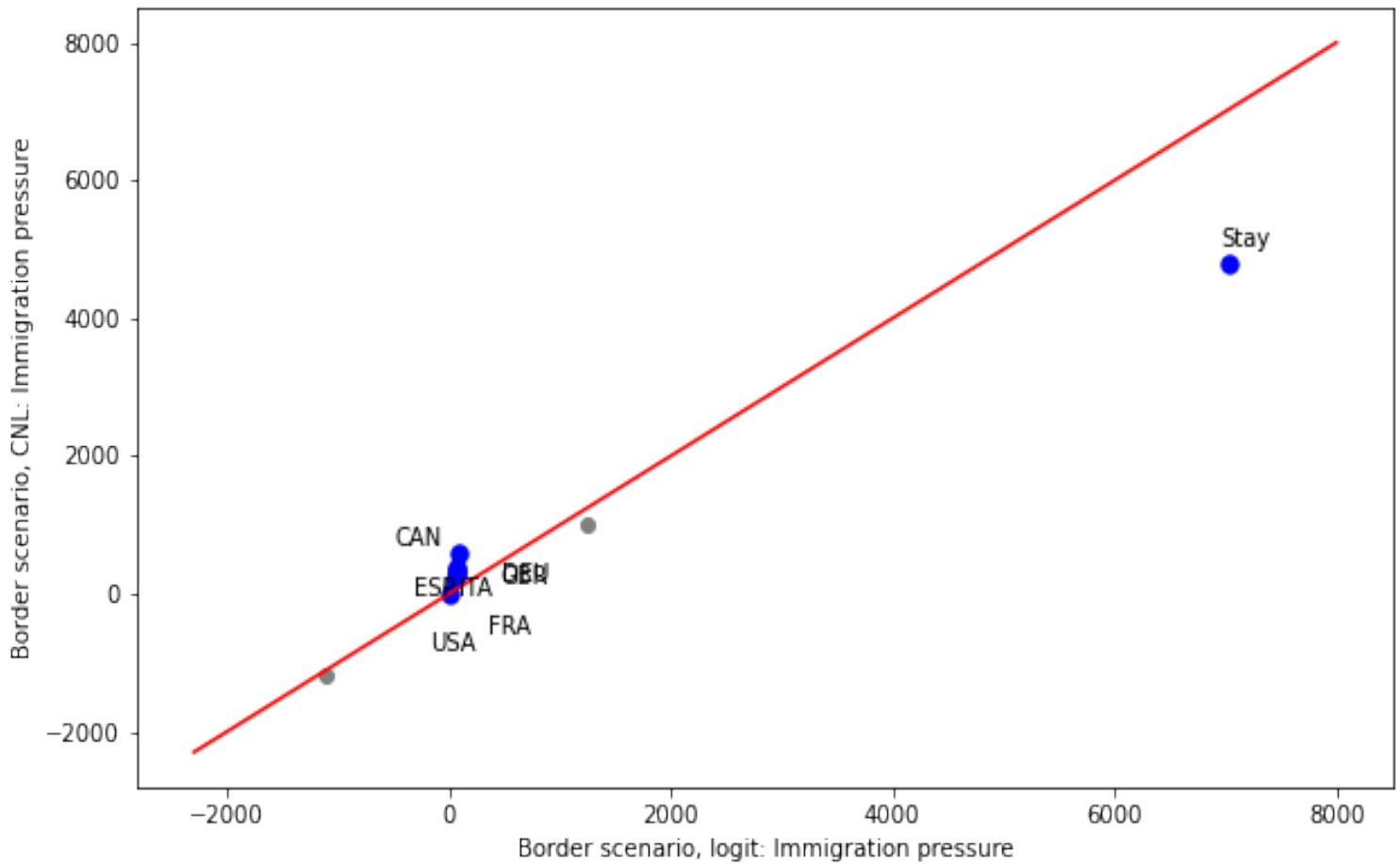

CAN
DEU
ESP
FRA
GBR
ITA
80
60
40
20
0
−10
−5
0
5
10
15
20
25
Skill scenario, CNL: Immigration pressure
Skill scenario, logit: Immigration pressure

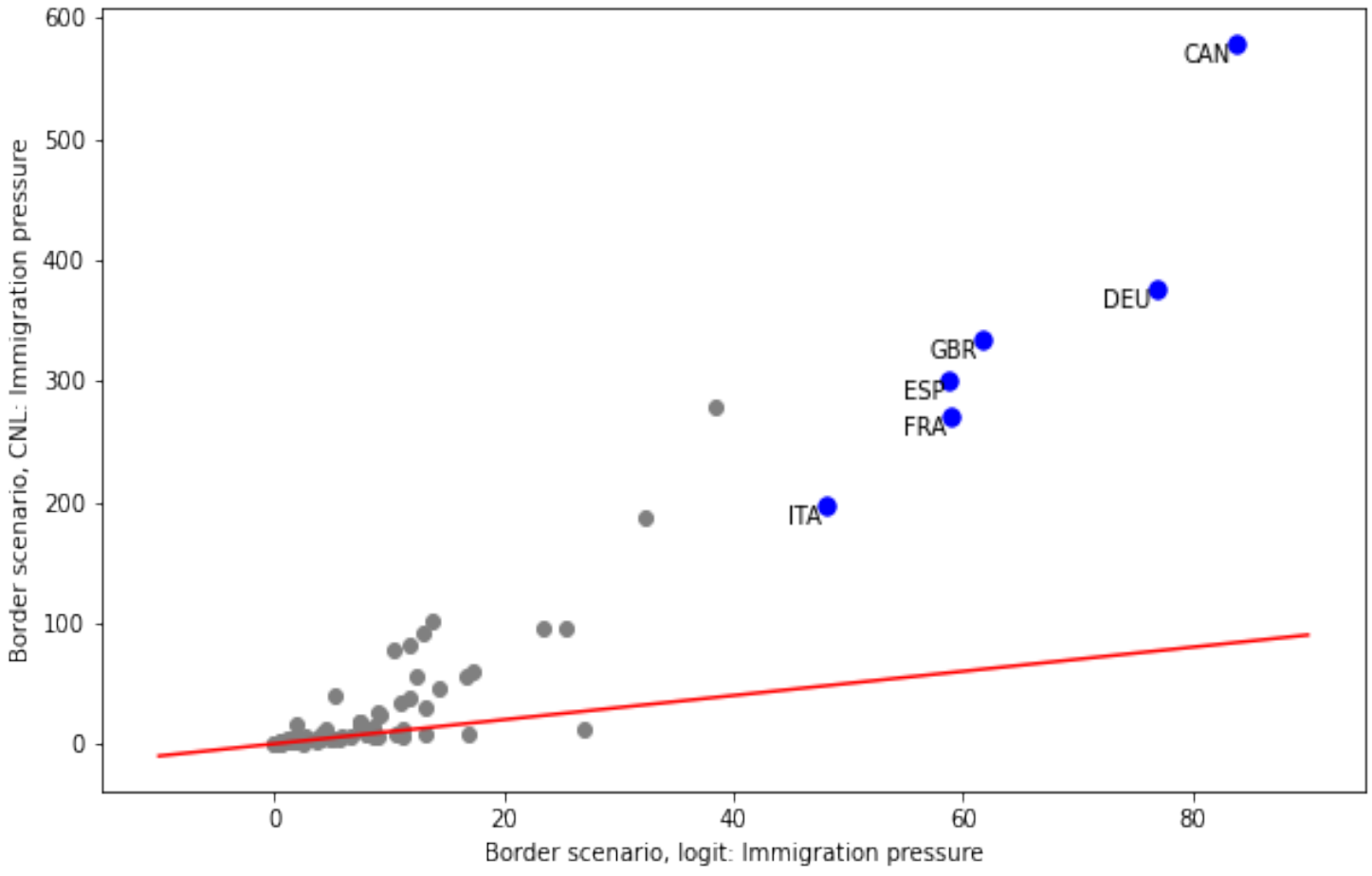

Difference in Immigration Pressure between CNL and Logit (in Thousands)
50
0
−50
−100
−150
−200
−250
−300
CAN
REU
ESP
FRA
GBR
ITA
USA
Stay
ISO

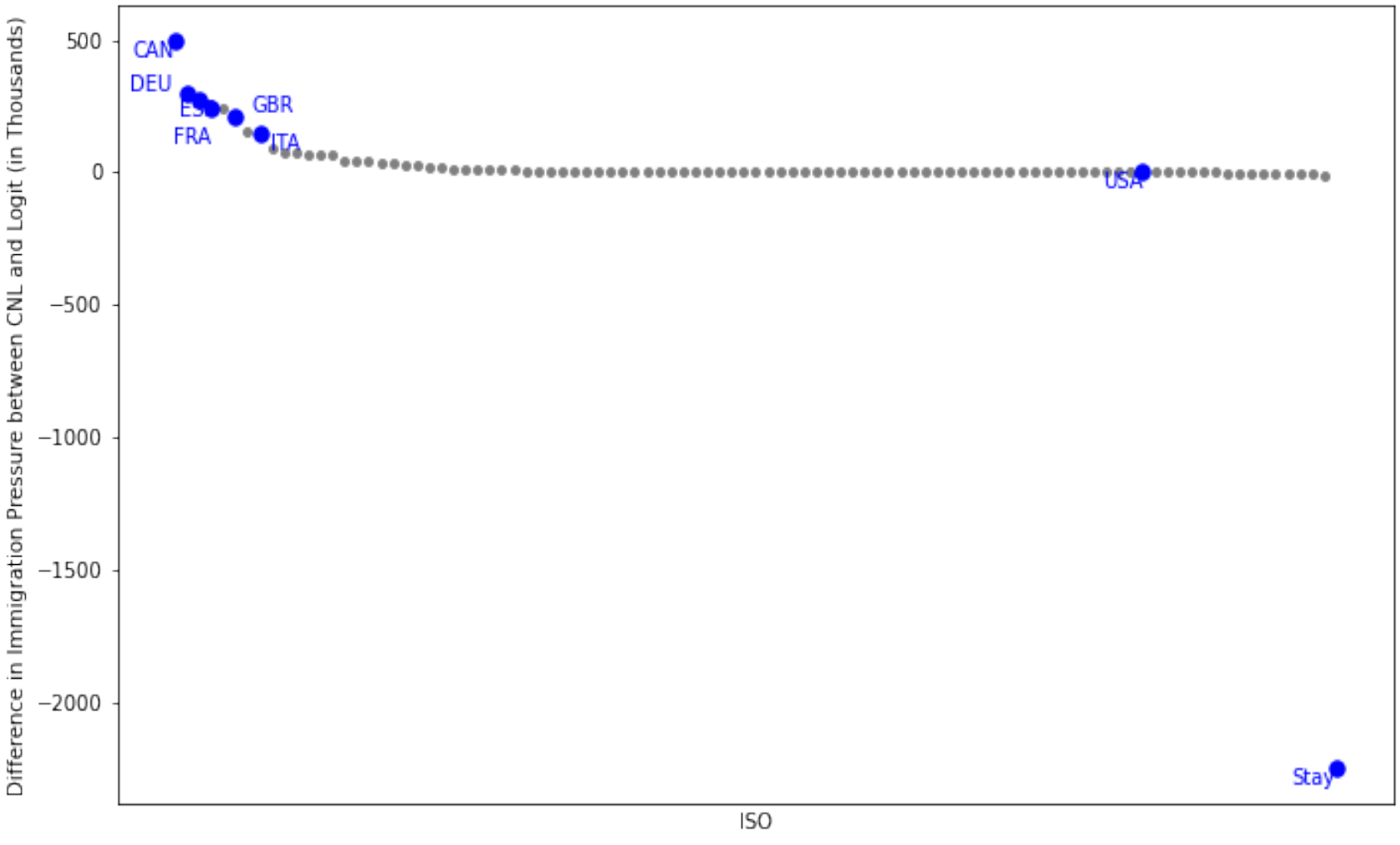
Border closure scenario




ARC Elasticities of US Disapproval by Country: Border Scenario
ARC Elasticity
0.8
0.7
0.6
0.5
0.4
0.3
0.2
0.1
Stay
0 common nests with the US
1 common nest with the US
2 common nests with the US
3 common nests with the US
COL CHL CRI JPN TUR KOR ISL EST SVK SVN LUX GRC HUN PRT CZE FIN POL DNK NOR AUT SWE BEL CAN GBR CHE NLD AUS ISR IRL BLZ NZL ITA DOM PRI ZAF PHL BHS KIR ZMB ATG IND NRU FJI JAM DMA VCT BWA BRB SYC SGP FRA ESP DEU MCO HRV QAT ARE AND SAU GAB CHN GEO ALB UKR IDN DZA ARM MAR AGO CYP BGR CPV ROU CMR PSE RUS BEN AFG EGY YEM BFA URY ARG PAN CUB BRA VEN FJI FSM SLV NIC HTI HND BOL GTM Stay
Country


8000
6000
4000
2000
0
−2000
Border scenario, CNL: Immigration pressure
Stay
CAN
ESP
ITA
FRA
USA
−2000
0
2000
4000
6000
8000
Border scenario, logit: Immigration pressure


600
500
400
300
200
100
0
Border scenario, CNL: Immigration pressure
0
20
40
60
80
Border scenario, logit: Immigration pressure
CAN
DEU
GBR
ESP
FRA
ITA


Difference in Immigration Pressure between CNL and Logit (in Thousands)
500
0
−500
−1000
−1500
−2000
CAN
DEU
ESP
FRA
GBR
ITA
USA
Stay
ISO

Case of a vicious circle: Foreign Utilities

	(1)	(2)	(3)	(4)
		All respondents		Potential movers
	ML	NL	CNL	ML
	Utility of moving to a foreign location (V_{jn})			
Log of distance	-0.136***	-0.0332***	-0.161***	-0.61***
GDP × LS	0.431***	0.0313***	0.336***	0.564***
GDP × MS	0.694***	0.0445***	0.443***	0.798***
GDP × HS	0.952***	0.0581***	0.466***	1.04***
Log of diaspora × LS	0.259***	0.0116***	0.175***	0.205***
Log of diaspora × MS	0.222***	0.0098***	0.146***	0.174***
Log of diaspora × HS	0.182***	0.00844***	0.123***	0.15***
Log of population	0.535***	0.0349***	0.264***	0.628***
Disapproval of US leadership × LS	-0.247	-0.0425***	-0.302**	-0.779***
Disapproval of US leadership × MS	-0.554***	-0.0619***	-0.459***	-1.12***
Disapproval of US leadership × HS	-1.37***	-0.12***	-1.01***	-2.17***
δ_{OECD}	0.0434	0.00626	1.91***	0.115***
$\delta_{Schengen}$	0.301***	0.0277***	0.583***	0.504***
$\delta_{English}$	0.407***	0.0283***	0.192	0.51***
	Parameters of the nest structure (μ_m)			
μ_{Foreign}	-	17.9***	-	-
μ_{OECD}	-	-	2.28***	-
μ_{English}	-	-	1.29***	-
μ_{Schengen}	-	-	3.4***	-
Log-likelihood	-9,380.25	-9,331.42	-9,260.97	-4,811.71
Observations	10,081	10,081	10,081	1,821
Parameters	23	24	26	12

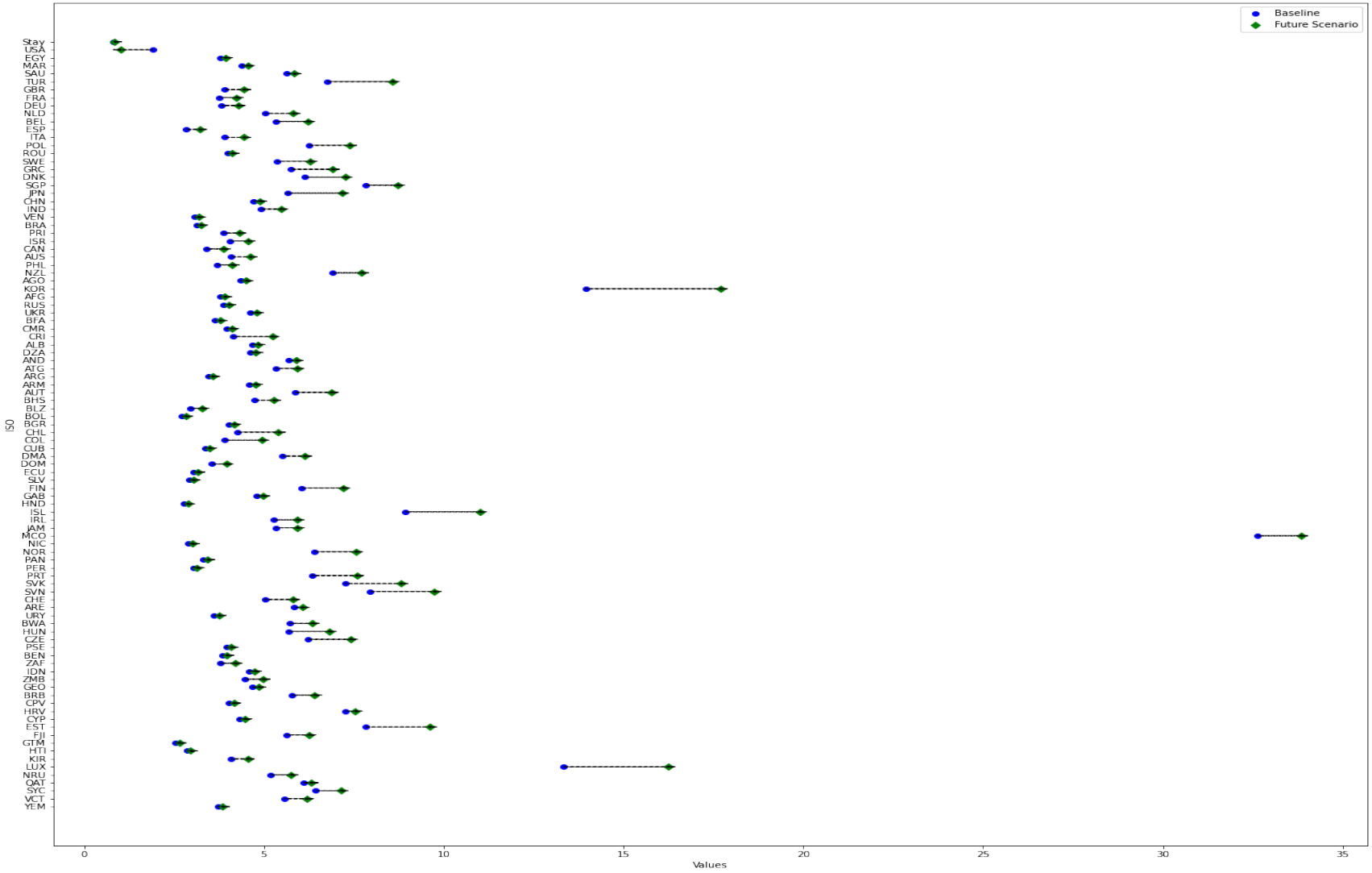
Vicious circle

- Negative effect of disapproval increases with skill level $\rightarrow$ Trump reelection can have selection effects in terms of skills.
- Null hyp of equal effects is rejected between HS and MS and between HS and LS.
- This might create a vicious circle : will deter more inflows of HS than MS and LS immigrants $\rightarrow$ Trump as a selection device.
- In line with recent evidence (for Italy): Bellodi, Docquier, Iandolo, Morelli and Turati (2024).

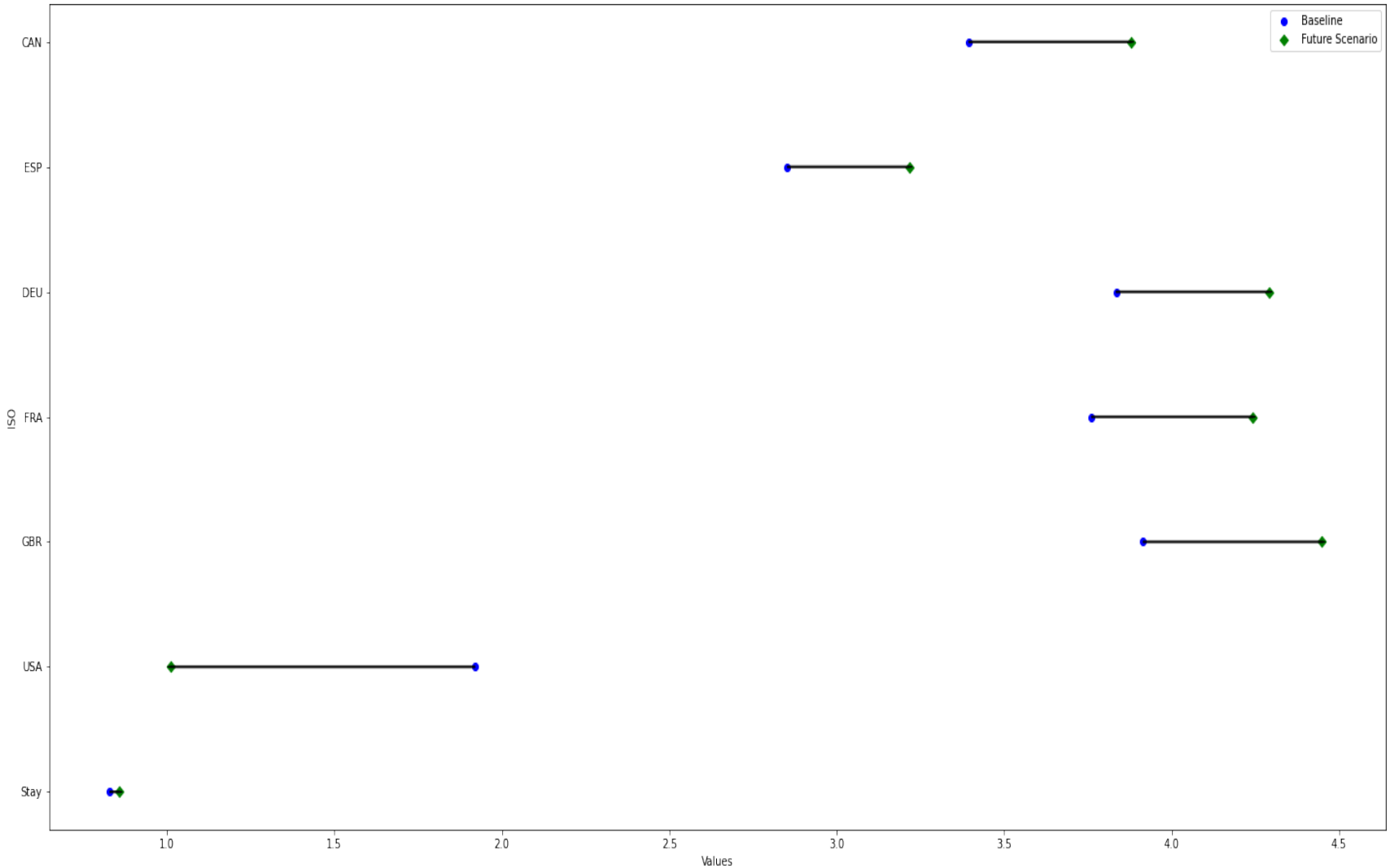
Vicious circle: preliminary results

- We simulate impact on inflows by skill level ; we compute selection ratios : $\frac{HS}{LS}$ or $\frac{HS}{total}$
- Base scenario: Trump reelection will lead to a decrease for the US of $\frac{HS}{LS}$ from 1.92 to 1.01.
- Trump would make shift in selection from positive to neutral !
- But main result is that selection becomes more positive in alternative locations especially for close substitutes.

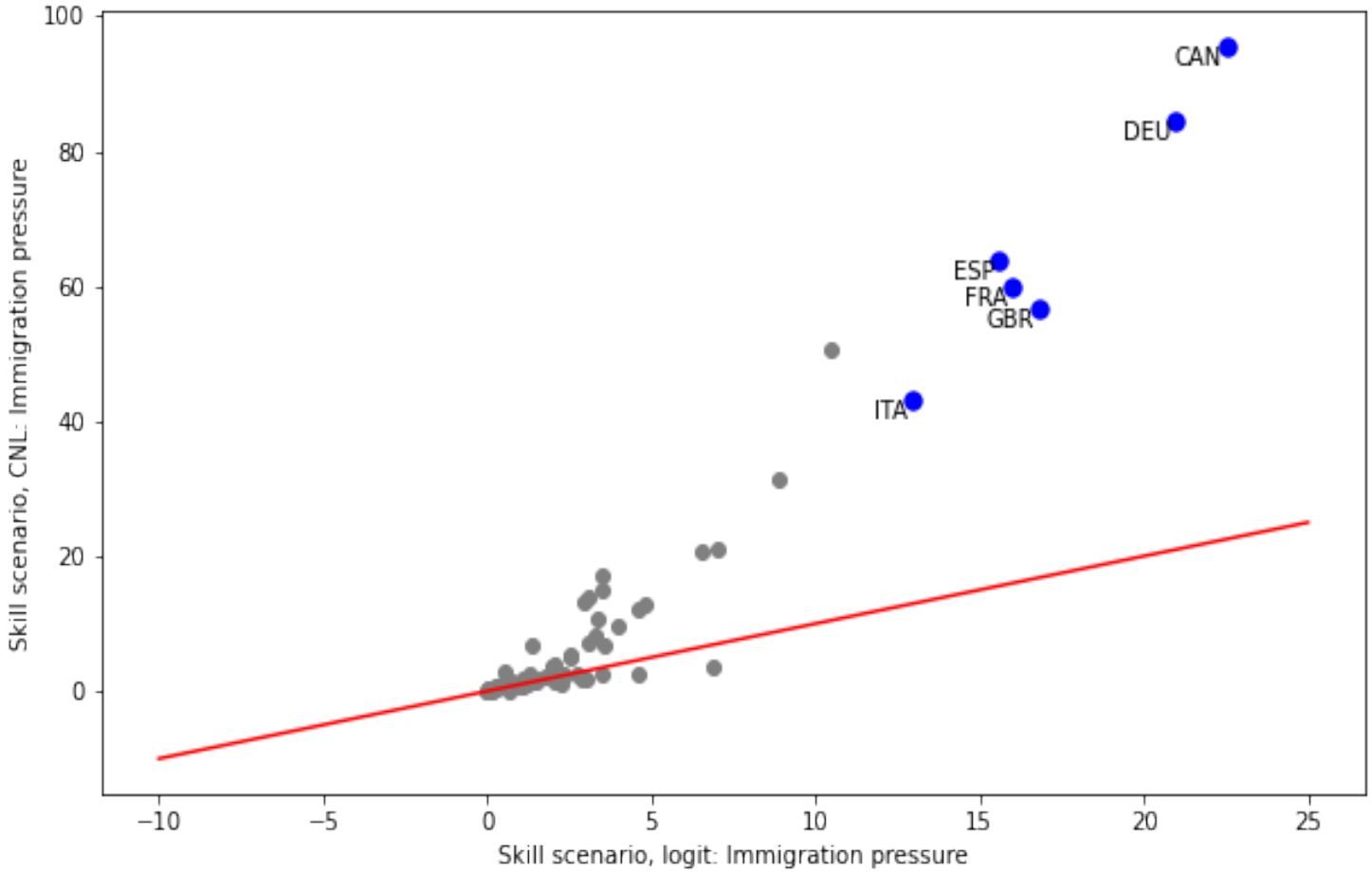
Disapproval by skill and the case for a vicious circle



Disapproval by skill and the case for a vicious circle



Disapproval by skill and the case for a vicious circle



Caveats about immigration pressures

- Immigration pressures are based on *aspirations*. Aspirational migrants: those stating that they would like to leave. $\rightarrow$ maybe not restrictive enough. In Mexico proportion of aspirational migrants about 19.5% (average world 22.1%). But:
- Our analysis extends to other Latin American and Carribean countries. Same anti-immigration rhetoric from Trump. Mexico represents only about 20%.
- Our analysis concerns primary migrants $\rightarrow$ We neglect dynamic effects, especially due to family reunification and other immigration from dependent individuals.

Conclusion

- We simulate the possible effects on immigration pressures faced by alternative destinations of a possible reelection of Donald Trump in 2024.
- We show that substitution effects highly depend on the modelling approach. Multinomial Logit models tend to yield biased predictions of variation in immigration pressures.$\rightarrow$ CNL modelling that captures more complex substitution patterns.
- Compared to Logit, we find that Mexico would face lower decrease in intended emigration (people will reshuffle their intended location more to another foreign destination).
- Countries facing the highest increase would be Canada, UK and a set of European countries (Fra, Ita, Spain, Ger).
- Trump induces negative selection in immigration for the US (vicious circle) and positive selection for close substitutes.

ARC elasticities and forecasts

- Aggregate ARC elasticities : $E^{P_j}_{Dis_{US}} = \frac{P_j^{Dis_{US}^{scenario}} - P_j^{Dis_{US}}}{P_j^{Dis_{US}}}$
- Indirect non linear impact : $\frac{\partial P_{n,j}}{\partial DisUS_n} = -\theta P(n,j)P(n,US)$