Department for
International Trade

Public Attitudes to Trade Tracker

Wave four report

Prepared for the Department for International Trade

Prepared by BMG Research

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1 Table of contents

2 Executive summary

2.1 Background and Methodology

In September 2018 DIT commissioned the inaugural wave of a nationally representative survey of the UK public. The survey's purpose is to examine public attitudes towards trade and understand the public's priorities relating to trade policy, and how these change over time. This report outlines findings for the fourth wave of the tracker.

The first baseline wave was conducted between November 2018 and January 2019. Wave 2 was held between June and August 2019 and the third wave between June and August 2020. Fieldwork for wave 4 was conducted between 12 March and 3 May 2021.

Waves 1 and 2 of the DIT Public Attitudes to Trade Tracker (PATT) combined push-to-web invites with a face-to-face administered Computer-Assisted Self-Interviewing (CASI) approach. Due to the COVID-19 outbreak, the face-to-face CASI fieldwork element for waves 3 and 4 was unable to go ahead as originally planned. A new methodology combining push-to-web and online panel interviews was introduced, with the push-to-web sample size increased. This was 74% of the final sample at wave 4 and 73% at wave 3. The introduction of the online panel approach helped to ensure a more representative sample with more scope for sub-group analysis[1].

Despite these changes to methodology, BMG Research has concluded that tracking against waves 1 and 2 can still be done credibly. However, small shifts - even if statistically significant - should be treated with additional caution.

Following a general overview of headline findings, this executive summary sets out the key findings for each section of the study in turn.

2.2 Overview of key findings

Support for free trade has increased. Support for establishing Free Trade Agreements (FTAs) with countries outside the European Union (EU) has increased. This is the first time support has increased since the tracker began[2].

Perceptions about wider benefits of trade have improved. A higher proportion of respondents in wave 4 say free trade will lead to more jobs, higher wages, and higher quality goods and services.

Following declines in wave 3, support for trade with the USA and China has increased in this wave (57% support establishing an FTA with the USA and 32% with

[1] Please note that in each wave a small number of telephone interviews were also conducted due to accessibility issues. This accounts for 20 interviews at wave 4.
[2] See guidance on changes discussed within this report and in the technical report

China). However, support for an FTA with India has dropped for a third wave in a row (40% support establishing an FTA with India at wave 4).

The conversation around trade was changing at the time of wave 4 fieldwork. There was a large decline in mentions of post-Brexit trade deals, trade relations with the USA, and lower standards/quality of goods. Vaccine supply, the reduction of EU exports and increased red tape are emerging issues.

Concerns about quality and standards have declined. A lower proportion of respondents in wave 4 cited issues around quality and standards as reasons to believe free trade will impact the UK negatively.

There has been a wider shift away from protectionist attitudes. Looking at general value-based measures of support for trade, there is evidence of a small but sustained shift away from support for protectionist positions.However, many still favour a protectionist response to COVID-19 and reliance on imports. Whilst sentiment on this measure shifted in the liberal direction, a slightly higher proportion of respondents still agree that COVID-19 demands “self-sufficiency” (29%) rather than “free flowing” trade (26%).

Protectionist views are most evident when it comes to cross-border sharing of data. Value-based trade questions showed people generally favour tighter controls on cross-border sharing of consumer data.

2.3 Interest, knowledge and engagement

Self-reported knowledge levels concerning how the UK trades with countries both in and outside the European Union have decreased. Compared to wave 3, a lower proportion of respondents feel knowledgeable about how the UK trades with countries outside the European Union (-2 percentage points). A lower proportion also feel knowledgeable about how the UK trades with countries in the European Union (-6 percentage points).

There has been a slight decrease in interest in how the UK trades with other countries both inside and outside the EU. However, decreasing interest is not limited to trade-related issues. Interest in the UK economy, UK foreign affairs, and the UK’s approach to environmental issues has also decreased.

New emerging issues are being talked about: analysis of open responses reveals stories of interest relating to the following topics: COVID-19 vaccine supply issues, Northern Ireland border issues, a reduction in EU imports/exports, and increased red-tape.

One in 3 respondents recalled the signing of the UK-Japan FTA. Respondents who recalled this were asked which topics they had seen or heard concerning the UK's free trade agreement with Japan signed in October 2020: 37% could remember the negotiation objectives but not any specific topics.

2.4 Support for free trade agreements and perceived impact

Overall support for establishing FTAs with countries outside of the EU has increased for the first time (70% support establishing FTAs with countries outside of the EU at wave 4, compared to 67% at wave 3 and 66% at waves 1 and 2 respectively). This has been accompanied by a decrease in opposition (4% oppose this at wave 4, compared to 7% at wave 3, 4% at wave 2 and 3% at wave 1).

Perceptions as to the impact of increased free trade are now more positive. Compared to wave 3, more respondents see increased free trade as having a positive impact both at a national and local level. A greater proportion continues to perceive increased free trade as having a positive impact on the UK more widely when compared to their local area.

Perceptions around the impact on jobs of increased free trade have improved considerably. Around half of respondents believe that increased free trade would lead to more jobs in the UK overall, however only around 2 in 5 say the same about their local area. These proportions are now in line with wave 1, after a dip in waves 2 and 3.

There has been a small increase in the proportion who feel increased free trade would lead to higher wages both at a national and local level. This reverses a downward trend seen at waves 2 and 3.

There has been a significant reduction in the proportion who expect lower quality goods and services as a result of increased free trade. Responses relating to these issues are cited more than others by respondents who think free trade will have a negative impact on the nation.

Increasing free trade with non-EU countries is popular, and even most respondents who are classified as having more protectionist attitudes say they are supportive of free trade agreements with countries outside the EU. This highlights the high levels of support for free trade more generally.

Those less optimistic about the UK’s economic outlook over the next 12 months are more likely to share negative views on the impact of free trade. They are more likely to believe that higher levels of free trade will lead to a decline in jobs and a decrease in wages. This highlights that shifting perceptions may not always be related to the specifics of trade, and that they can be influenced by the broader state of the economy and levels of economic pessimism.

The UK public tends to show preference towards more liberal free trade attitudes rather than protectionist positions. However, most do agree with more protectionist arguments when asked specifically about the cross-border sharing of data. Compared to the previous wave, there is evidence of a small but sustained shift away from support for protectionist positions.

Support for the UK joining the CPTPP has gone up, with around 6 in 10 respondents who know at least a little about the CPTPP expressing support. This is the highest level of support recorded since tracking began.

2.5 Trading partner preferences

Support for a trade deal with the USA and China increased for the first time (57% supporting establishing an FTA with the USA at wave 4, compared to 49% at wave 3, and 32% support establishing an FTA with China at wave 3, compared to 28% at wave 3). However, support for an FTA with India continues to decline (40% support this at wave 4, compared to 43% at wave 3, 51% at wave 2 and 38% at wave 1).

Compared with other countries with which the UK already has trade agreements in place, there is high support for enhancing the trade deal with Canada. Two in 3 support enhancing the existing FTA with Canada. Around half are also supportive when asked about Singapore, and around 2 in 5 express support when asked about Mexico and Vietnam.

Similar levels of support and opposition exist for establishing free trade agreements with UAE and Saudi Arabia. Around 3 in 10 support establishing an FTA with UAE (30%) and Saudi Arabia (27%), with similar proportions opposion this. 24% oppose establishing an FTA with Saudi Arabia and 20% are opposed when asked about UAE. However, there are slightly higher levels of support and lower opposition for striking an FTA with Brazil: around 1 in 3 are supportive and 1 in 10 are opposed.

Increasing priority given to economic factors when negotiating deals: protecting existing jobs in the UK overall and creating new ones has become a high priority. This is regardless of the country negotiating free trade agreements with the UK.

Perceptions of increasing quality: Japan continues to be seen as producing high quality goods by the largest proportion of respondents. Perceptions of quality have improved for the USA compared to wave 3.

Australia and New Zealand continue to be popular partners: around 2 in 3 respondents continue to be supportive of a deal with Australia and New Zealand.

Respect for human rights is a top priority as a characteristic for an appealing trade partner: When asked generally about considerations that would make another country an appealing trading partner (without naming specific countries), respecting human rights comes as the top consideration.

3 Background and methodology

3.1 Background, context and research objectives

The Department for International Trade (DIT) 2021 to 2022 Outcome Delivery Plan sets out an ambitious set of trade and investment objectives for the year ahead focused on achieving 4 priority outcomes:

1. secure world-class free trade agreements and reduce market access barriers, ensuring that consumers and businesses can benefit from both
2. deliver economic growth to all the nations and regions of the UK through attracting and retaining inward investment
3. support UK business to take full advantage of trade opportunities, including those arising from delivering FTAs, facilitating UK exports
4. champion the rules-based international trading system and operate the UK's new trading system, including protecting UK businesses from unfair trade practices

DIT view the UK public as an important group of stakeholders and the PATT has been designed to help ensure that the public's views are considered during the policy making process and in the development of communications.

In September 2018, DIT commissioned the first wave of a nationally representative survey of the UK public to examine public attitudes towards trade and to understand the public's priorities as they relate to trade policy. Waves 2, 3 and now 4 have enabled DIT to track shifts in sentiment over time.

Fieldwork for wave 4 was conducted between 12 March and 3 May 2021, the first wave to be conducted after the end of the transition period. The first baseline wave concluded in January 2019, wave 2 finished in August 2019 and wave 3 was completed in August 2020. Final reports for waves 1, 2 and 3 have been published by DIT[3].

3.2 Overview of methodology

3.2.1 Overview of methodological changes at wave 3 and 4[4]

Readers should treat comparisons of waves 3 and 4 with data from waves 1 and 2 **with additional caution**. Caution should always be exercised when tracking survey data, but extra caution should be taken in this instance due to the methodological changes that were introduced in wave 3, following the COVID-19 outbreak.

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[3] For wave 1, please see: https://www.gov.uk/government/publications/public-attitudes-to-trade-tracker-wave-1
For wave 2, please see: https://www.gov.uk/government/publications/public-attitudes-to-trade-tracker-patt-wave-2
For wave 3, please see: https://www.gov.uk/government/publications/public-attitudes-to-trade-tracker-patt-wave-3
[4] For a more detailed overviews of the methodology used at wave 4, please see the technical report available at: https://www.gov.uk/government/collections/public-attitudes-to-trade-tracker

Waves 1 and 2 of the DIT PATT combined push-to-web invites with a face-to-face administered Computer-Assisted Self-Interviewing (CASI) approach. Each element comprised roughly 50% of the achieved sample. Due to the COVID-19 outbreak, the face-to-face CASI fieldwork element for wave 3 was unable to go ahead as originally planned, with a new methodology introduced and replicated again at wave 4.

As a result, the push-to-web sample size was increased (74% of the final sample at wave 4 and 73% at wave 3). Online panel interviews were used to supplement the push-to-web approach to ensure a more representative sample with more scope for sub-group analysis[5].

A summary of modes and sample sizes is included in Table 1 below.

Table 1: Sample composition by wave

Wave	Push-to-web	CASI	Online Panel	Total
1	1,149	1,251	N/A	2,400
2	1,130	1,219	N/A	2,349
3	2,374	N/A	850	3,224
4	2,953	N/A	1,036	4,009

3.2.2 Push-to-web and online panel overview

Context

Due to the COVID-19 outbreak, the face-to-face fieldwork element from wave 3 was unable to go ahead as originally planned.

As a result, the push-to-web sample size was increased (73% of the final sample), with online panel interviews (26% of the final sample) supplementing the push-to-web approach, to ensure a more representative sample with more scope for sub-group analysis[6].

Given the continuing COVID-19 pandemic and associated social distancing guidelines, this approach was maintained in wave 4, with 74% of the final sample achieved via push-to-web (2,953 interviews) and 26% via online panel (1,036 interviews).

[5] Please note that in each wave a small number of telephone interviews were also conducted due to accessibility issues. This accounts for 20 interviews at wave 4.
[6] Please note that in each wave a small number of telephone interviews were also conducted due to accessibility issues. This accounts for the additional completes at wave 4 (total of 20).

Push-to-web

In line with previous waves, the push-to-web sample was selected via a stratified random probability design. Postal invites were sent to 12,000 randomly selected addresses, double the number sampled at waves 1 and 2 and identical to that sent out at wave 3. 2,953 respondents completed the survey, representing a response rate of 25%.

Prospective respondents were provided with a link to the online survey in their invitation letter. The survey was created on software designed to maximise accessibility by ensuring compatibility across devices, including tablet devices and smartphones.

In order to ensure sufficient base sizes to allow reliable analysis, the number of invites were boosted in each of the devolved nations.

Online panel interviews

Alongside the push-to-web approach, BMG conducted 1,036 of the target interviews via online panel interviews (26% of the total). An online panel is defined as an online group of recruited people willing to conduct social and market research surveys in return for a small financial incentive for each survey completed. BMG Research worked with an online panel partner, Savanta, to achieve the online panel interviews[7].

The panel interviews were used to target sub groups of people with low response in the push-to-web approach. An interlocking grid of targets was created on the basis of age, gender, and region. Doing so ensured a more balanced and representative sample overall with more scope for sub-group analysis.

[7] For more information, please see: https://savanta.com/data-collection-analysis/

3.2.3 Weighting

Following the completion of fieldwork, the data was weighted to maximise representativeness to the UK population. Weighting targets were as follows:

- age
- gender
- Government Office Region
- Indices of Multiple Deprivation (IMD)
- 2016 EU referendum vote
- education level[8]

All targets were ascertained using official population statistics released by the ONS and the Electoral Commission's official published 2016 Referendum results.

Table 2 2, below, shows the combined weighted and unweighted base sizes for all waves by region.

Table 2: Total combined completes

Region	Wave 1 Unweighted	Wave 2 Unweighted	Wave 3 Unweighted	Wave 4 Unweighted	Wave 1 Weighted	Wave 2 Weighted	Wave 3 Weighted	Wave 4 Weighted
England	1,819	1,747	2,410	3,102	2,017	1,973	2,708	3,368
Scotland	202	202	302	316	202	198	272	338
Wales	213	203	282	294	115	113	155	192
Northern Ireland	166	197	230	297	66	65	89	111
Total	**2,400**	**2,349**	**3,224**	**4,009**	**2,400**	**2,349**	**3,224**	**4,009**

3.2.4 Questionnaire design

Following considerable work developing the questionnaire in advance of wave 1, 2 and 3, most of the questions at wave 4 remained identical, with a similar order and structure of sections so as to minimise potential order effects[9]. This allows for the majority of questions to be tracked across multiple waves, to see how responses have changed over time. However, a number of additions and changes were made at wave 4, including:

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[8] A new addition at wave 3 and continued at wave 4. For more detail on why this was introduced, please see technical report for wave 4 available at: https://www.gov.uk/government/collections/public-attitudes-to-trade-tracker

[9] For more information of order effects, please see Strack, F. (1992) *'"Order Effects" in Survey Research: Activation and Information Functions of Preceding Questions'*, available here: https://link.springer.com/chapter/10.1007/978-1-4612-2848-6_3

- additional questions asking respondents about their support for free trade agreements with Brazil, United Arab Emirates (UAE), and Saudi Arabia
- new questions asking respondents about their support for enhancing existing deals with Canada, Mexico, Vietnam, and Singapore
- changing the trade consideration questions to be about considerations generally rather than about specific countries
- new values-based questions exploring views on the cross border sharing of consumer data and views around supply chain and self-sufficiency
- in some instances, while the questions remain the same, specific response options have changed to reflect emerging priorities

As was the case with previous waves, BMG conducted a round of cognitive testing with members of the public in order to review the question wording and structure of new or substantially altered questions[10]. Upon review of themes emerging from the cognitive interviews, small textual changes were made before a final draft of the questionnaire was agreed.

3.2.5 Fieldwork

Fieldwork was conducted between 12 March 2021 and 3 May 2021[11]. Notable events taking place both prior to and during the fieldwork period include: the start of the COVID-19 vaccines rollout (from December 2021), lockdown regulations coming into effect in England (January 2021), and India being added to the UK's red list[12] following a rapid rise in COVID-19 cases (April 2021)[13].

Other events which could have impacted perceptions of trade are also worth noting, most of which took place prior to fieldwork. These include:

- the signing of the UK-Japan free trade agreement (23 October 2020)
- Joe Biden being inaugurated as President of the USA (20 January 2021)
- the government's application to join the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) (1 February 2021)

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[10] For more information on the cognitive testing process, please see the technical report available at: https://www.gov.uk/government/collections/public-attitudes-to-trade-tracker

[12] The Red/Amber/Green rating system to indicate COVID-19 precautions to take when travelling outside of the UK. Countries are split into tiers depending on current risk: https://www.gov.uk/guidance/red-amber-and-green-list-rules-for-entering-england

[13] From 23 April 2021, a travel ban was implemented for visitors from India; and British, Irish and third-country nationals with residence rights (including long-term visa holders) arriving from India are required to self-isolate in a government-approved quarantine facility for 10 days.

3.3 Contents and structure of report

The findings outlined in the report are structured under the following headings:

1. Interest, knowledge and engagement: firstly, the report examines respondents' interest in the subject of trade, their knowledge of trade-related issues, and how these compare to the results observed at previous waves. The report also examines levels of engagement by exploring what trade-related news stories respondents reported seeing or hearing.

2. Support for free trade agreements and their perceived impact: next, the report explores levels of support for free trade agreements more generally, as well as support for inward investment. This section also examines awareness of and support for the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and looks at the extent to which respondents hold views typically understood or described as 'protectionist'.

3. Trade partner preferences: lastly, the report examines levels of support for trade agreements and how these have changed over time. This section also includes analysis of the traits that respondents view as important for potential trading partners to possess with respect to specific countries of interest.

3.4 Presentation of results

Outlined below is a set of guidance to assist when reading and interpreting the data outlined in this report.

Section Structure: to encourage clarity and to ensure that the conclusions that have been reached from the data are clear, each section of the report is structured around what can be viewed as the main findings. Each of the main findings acts as a heading under which further detail and analysis is provided.

Rounding: the data used in this report are rounded up or down to the nearest whole percentage. It is for this reason that, on occasion, tables or charts may add up to 99% or 101%. Results that do differ in this way should not have a sum-total deviance that is larger than around 1 to 2%.

Sample: the sample was designed to be representative of the UK public. Findings refer to 'respondents', rather than residents or the general public. However, findings can be considered to be indicative of the wider UK public's views.

Base sizes: results are based on all respondents unless otherwise specified. Where results for sub-groups have been used in charts, their relevant base sizes (unweighted) are shown in parentheses after the description of the sub-group. Otherwise, base sizes are detailed in the notes at the bottom of each figure and table.

Annotation: in the tables and charts contained in this report, a * symbol denotes a proportion that is less than 0.5%, but greater than zero.

Open responses: figures relating to questions asked in an open response format have been labelled as such in the notes located at the bottom of each figure.

Statistical Significance: Throughout this report, the term “significant” is only used to describe differences between particular groups that are statistically significant to 95% confidence. This means that there is only a 5% probability that the difference has occurred by chance (a commonly accepted level of probability), rather than being a ‘real’ difference.

Unless specified, all statistics are compared against the total.

- where a result is significantly higher than the average, or when compared to results observed at previous waves, charts in this report will be marked with the following symbol: 

- where a result is significantly lower than the average, or when compared to results observed at previous waves charts in this report will be marked with the following symbol: 

The report focuses on where statistically significant differences have been identified. Where differences between waves are discussed during the commentary, these differences can all be presumed to be statistically significant unless otherwise noted[14].

It is important to note that the online panel interviews relied on quota sampling. There are a number of potential issues with using formal statistical significance tests on quota sample data including bias and lack of known sampling probability. Therefore, it is advised that any results of statistical significance tests are used as a guide and should always be interpreted with a degree of caution[15].

[14] Data tables can be accessed here: https://www.gov.uk/government/collections/public-attitudes-to-trade-tracker

[15] Further discussion on quota and probability sampling and the consequences for statistical tests is provided in the technical report which can be accessed here: https://www.gov.uk/government/collections/public-attitudes-to-trade-tracker

4 Interest, knowledge and engagement

4.1 Background

At the outset of the survey, respondents were asked a series of questions designed to measure their levels of interest in, knowledge of, and engagement with, the subject of trade.

Consistent with previous waves, these areas were principally explored at the beginning of the survey in order to ensure that responses were not artificially 'primed' by other survey questions.

It should be noted that responses to questions designed to measure interest and engagement around a subject, particularly those that relate to politics, are often influenced by social desirability bias[16]. It may be considered desirable to be seen as interested or knowledgeable on topical issues and current affairs. Therefore, it is possible that respondents may overstate their interest or knowledge of such issues when responding to survey questions. The results discussed below should, therefore, be treated with this cautionary note in mind. Nonetheless, it is worth noting that some of this effect is designed to be ameliorated by the self-completion method chosen for this survey, which removes the social pressure of an interviewer.

4.2 Interest in trade

When examining what is referred to as levels of 'interest' in trade, we are referring to the general levels of desire to give the subject of trade further attention and thought. We may consider that a respondent who reports high levels of interest may be more likely to actively explore materials or news stories that relate to free trade in more detail.

4.2.1 There has been a slight decrease in interest in how the UK trades with other countries but decreasing interest is not limited to trade-related issues.

In order to examine interest levels around the subject of trade, respondents were separately asked about the extent to which they were interested in how the UK trades with EU countries and non-EU countries. This is consistent with the approach in previous waves. This featured alongside a list of other topics of potential public interest: the UK economy, the UK's approach to environmental issues, and UK foreign affairs.

A total of 70% of respondents said they felt interested in how the UK trades with countries inside the European Union. The same proportion (70%) also said they were interested in how the UK trades with countries outside the European Union. This includes

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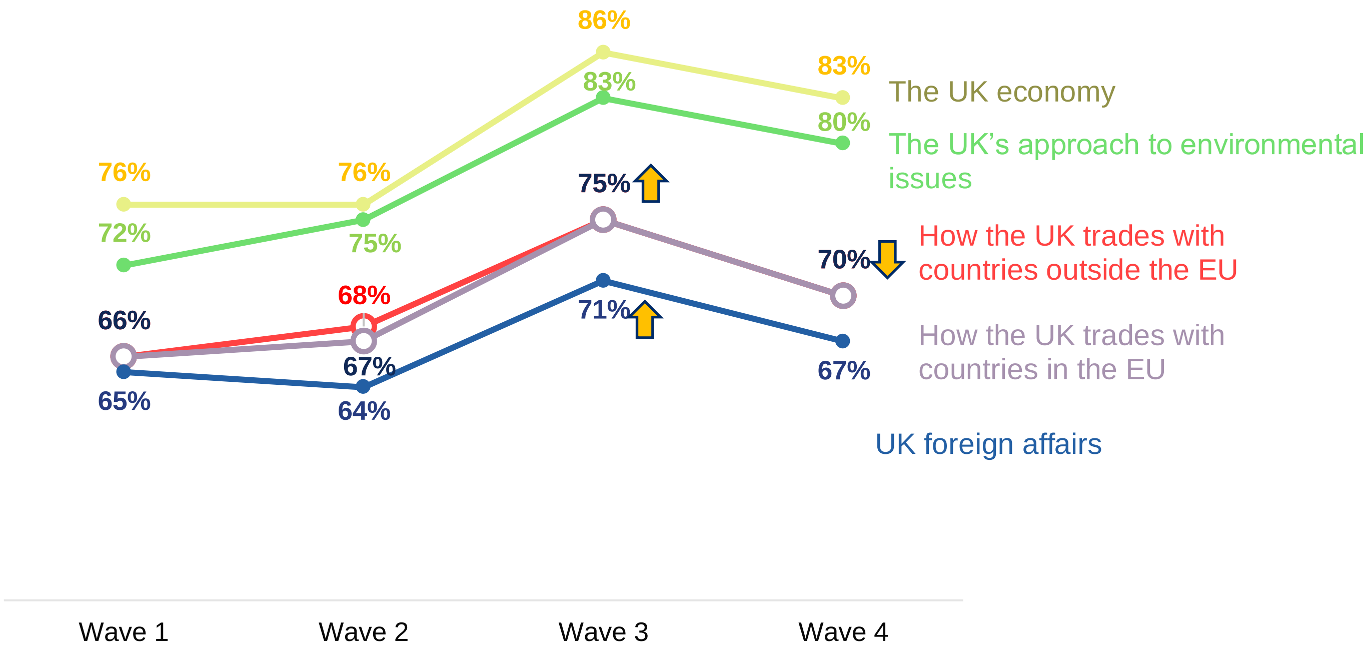
[16] For more information on effects of social desirability bias and associated effects on survey questions, see Krumpal, I. (2013) *'Determinants of social desirability bias in sensitive surveys: a literature review'*, available here: https://link.springer.com/article/10.1007/s11135-011-9640-9

around a quarter of respondents who stated they are 'very interested' in how the UK trades with countries both inside (25%) and outside the EU (24%).

As Figure 1 illustrates, this represents a significant drop in overall levels of interest compared to the results at wave 3. Interest in trade with countries outside the EU has decreased by 5 percentage points, as has interest in trade with countries in the European Union.

However, it is important to note that levels of interest in a variety of other topics have also decreased significantly when compared to wave 3 results. Interest in UK foreign affairs has gone down by 4 percentage points while interest in the UK economy and the UK's approach to environmental issues has decreased by 3 percentage points respectively.

Figure 1: Interest in how the UK trades with other countries and other topics



IK1: How interested would you say you are in …?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009)
Statistical significance arrows represent significant differences when compared to results observed at previous wave.

4.2.2 Those who are older, in higher socio-economic grades, or are degree educated continue to be more likely to report interest in how the UK trades with countries outside the EU.

By analysing responses across demographic groups, consistent patterns emerge in terms of the groups more likely to report being interested in how the UK trades with countries outside the EU. Figure 2 below charts interest levels among demographic groups on the question of interest in how the UK trades with countries outside the EU[17].

Consistent with patterns observed in previous waves, respondents are more likely to report being interested if they:

- are in higher socio-economic grades (SEG): 84% of those in SEG classifications AB say they are either very or fairly interested. This compares to 62% in SEG DE classification[18]

- are older: respondents in older age groups are more likely to report being interested, while the opposite is true of those aged under 35. Of those aged 16 to 24, 59% say they are interested. This compares to 79% of those aged 65 to 74 and 76% of those aged 75 and over. Nonetheless, the overall decrease in interest compared to wave 3 cannot be attributed to younger or older generations. In fact, the largest decreases in interest can be observed among those aged 25 to 34 (11 percentage points) and those aged 65 to 74 (9 percentage points)

- have obtained degree level qualifications: 82% of those with at least an undergraduate degree level of education report being interested, which compares to 61% of those with no qualifications. However, decreases in interest levels between waves 3 and 4 are only significant among those with degree level qualifications (5 percentage points)

- are men: by a margin of 11 percentage points, men (76%) are significantly more likely than women (65%) to report being interested[19]

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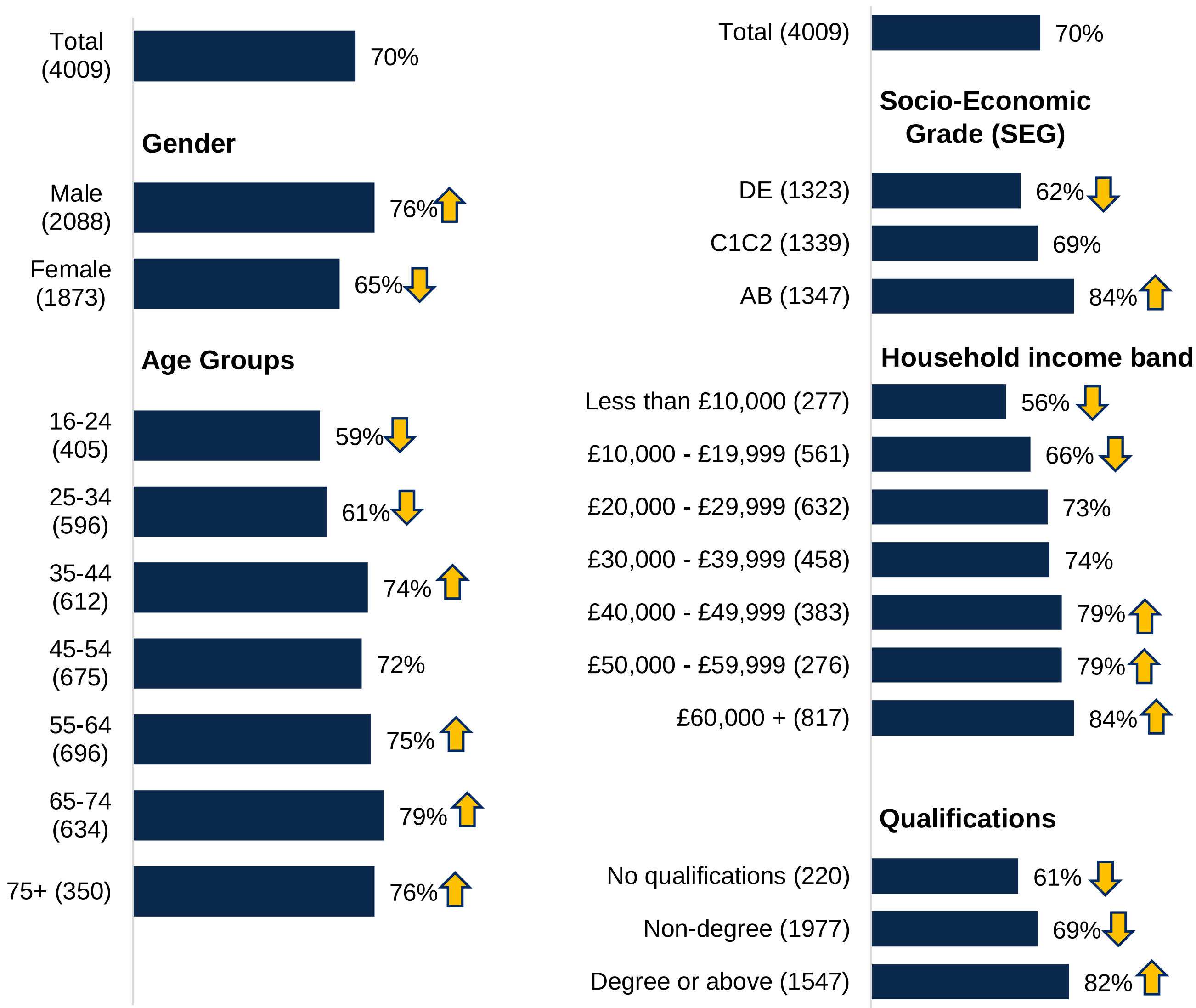
[17] Whilst not set out in full, responses to the question about interest in how the UK trades with countries inside the EU follow a similar pattern.

[18] More detail on SEG classifications is provided in the appendix.

[19] Gender differences in interest levels with respect to political related issues is a common phenomenon within survey research. See, for example: Coffe, H. (2013) *'Women Stay Local, Men Go National and Global? Gender Differences in Political Interest'*, available at: https://link.springer.com/article/10.1007/s11199-013-0308-x

Figure 2: Interest levels in how the UK trades with countries outside the EU across key groups



IK1: How interested would you say you are in….? How the UK trades with countries outside the European Union
Proportions stating that they are very or fairly interested.
Unweighted base sizes provided in parenthesis.
Statistical significance arrows represent significant differences against the average result.

4.3 Knowledge of free trade

An important research objective was to explore how knowledgeable respondents felt about free trade and trade related issues. As in wave 3, knowledge was explored using self-reported knowledge questions.

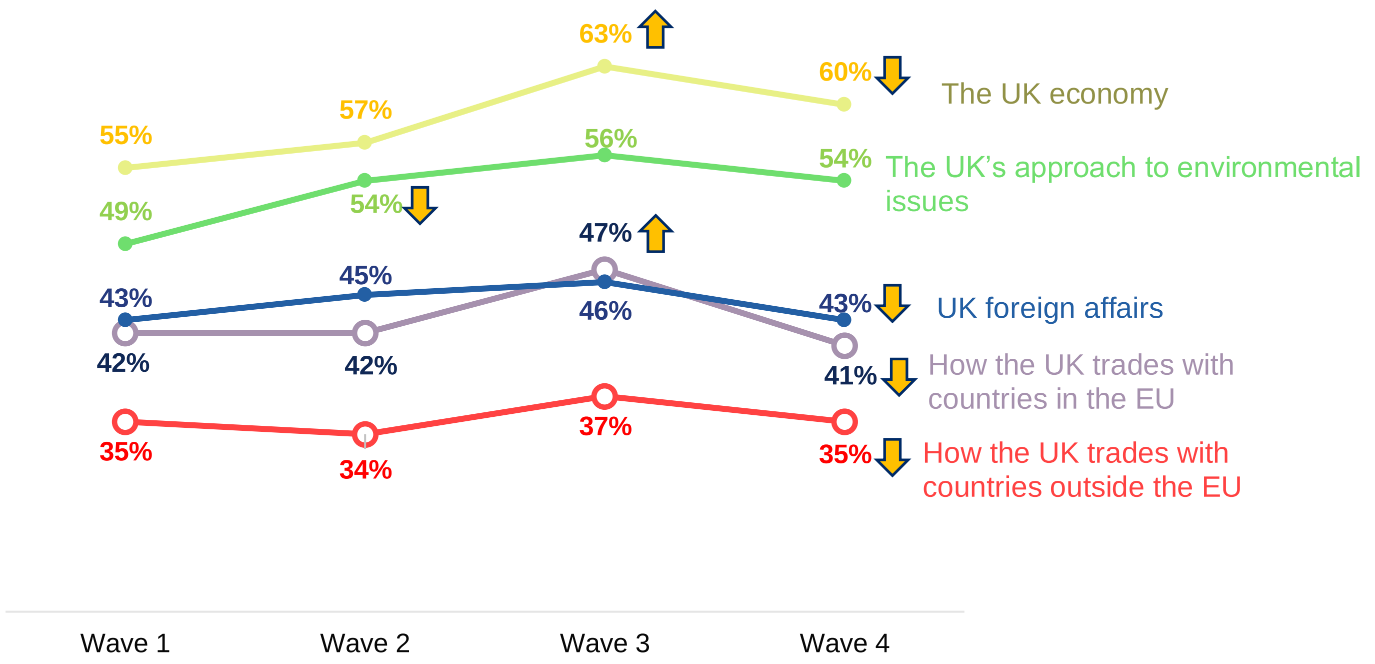
4.3.1 Self-reported knowledge levels have decreased with respect to how the UK trades with countries both in and outside the European Union

While 7 in 10 indicate that they are interested in how the UK trades with other countries, only a minority say they feel knowledgeable (see Figure 3). The results, therefore, continue to indicate a "knowledge gap" between levels of interest and levels of knowledge.

Around 1 in 3 (35%) respondents said they feel knowledgeable about how the UK trades with countries outside the EU (versus 37% at wave 3). Slightly more respondents say they feel knowledgeable about how the UK trades with countries in the European Union (41%, versus 47% at wave 3). Both figures represent significant decreases compared to wave 3 but are in line with results reported at waves 1 and 2.

This continues to be lower than the proportion who say they feel knowledgeable about the UK's approach to environmental issues and the UK economy (54% and 60% respectively). However, as at wave 3, the proportion who feel knowledgeable about how the UK trades with countries in the European Union is in line with the proportion who feel knowledgeable about UK foreign affairs (41% and 43% respectively).

Figure 3: Self-reported knowledge of how the UK trades with other countries and other topics



IK2. How knowledgeable would you say you currently are about ...?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009)
Statistical significance arrows represent significant differences when compared to results observed at knowledgeable previous wave.

4.3.2 Those who are older, in higher socio-economic grades, or are degree educated continue to report higher levels of knowledge

Consistent with previous waves, respondents who are older, in higher socio-economic grades, and degree educated are more likely to say they feel knowledgeable about how the UK trades with other countries. This applies both in terms of trade inside and outside the EU.

Figure 4, below, charts interest levels among key groups on the question of how knowledgeable they feel about how the UK trades with countries outside the EU[20].

In line with previous waves, respondents are more likely to say they are knowledgeable if they:

- are in higher socio-economic grades (SEG): respondents from higher socio-economic grades are more likely to report feeling knowledgeable. Close to half of those within the SEG AB classifications say they are knowledgeable (47%), far higher than the rate of those in SEG classifications DE (28%)
- have obtained degree level qualifications: there continues to be a significant gap between those who have obtained a degree or above level qualifications (44%), those who have obtained non-degree qualifications (33%) and those who have no qualifications (23%)
- are men: the gender gap also persists. Men (44%) are much more likely than women (26%) to report feeling knowledgeable about how the UK trades with countries outside the EU. This is a commonly observed phenomenon in survey research, with women often more likely to state they feel less knowledgeable when answering survey questions about political issues[21]

Compared to wave 3, the biggest drop in knowledge can be observed among those aged 65 to 74 (29%, compared to 38% at wave 3).

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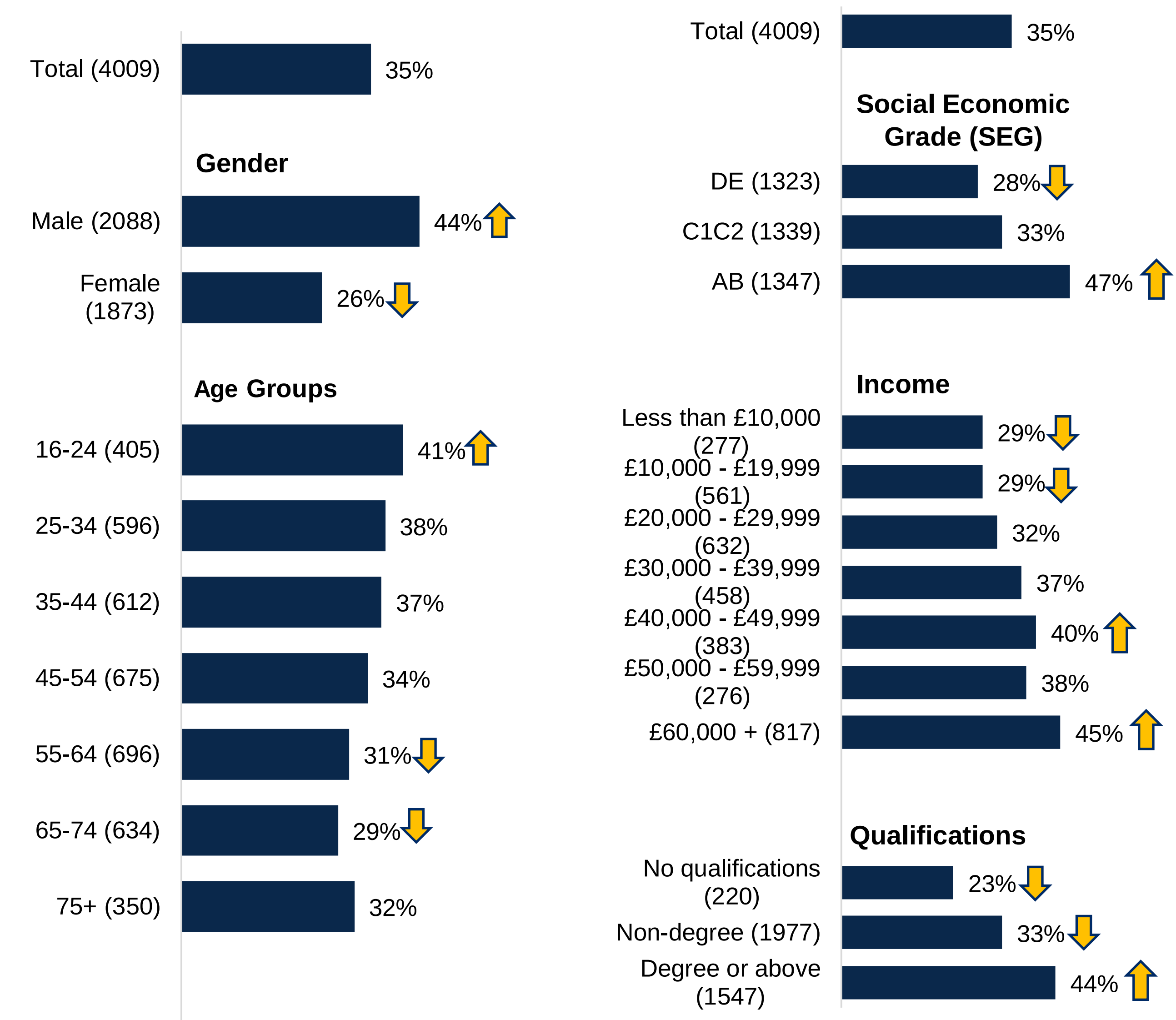
[20] Whilst not set out in full, responses to the question about how knowledgeable they feel about how the UK trades with countries *inside* the EU follow a similar pattern.

[21] Evidence from academia suggests that this can often be partly explained by a variety of factors that are often not related to the 'actual' knowledge levels of respondents. For example, some studies suggest that women are more risk-averse when answering knowledge related questions and are more likely to state 'don't know'. Other studies suggest that women tend to be more interested in political information related to local affairs rather than national and international issues. For further discussion, please see Lizotte, M and Sidman, A. (2009*) 'Explaining the Gender Gap in Political Knowledge'*, available at: https://www.researchgate.net/publication/231898529_Explaining_the_Gender_Gap_in_Political_Knowledge

Figure 4: Self-reported knowledge levels about how the UK trades with countries outside the EU - across key groups



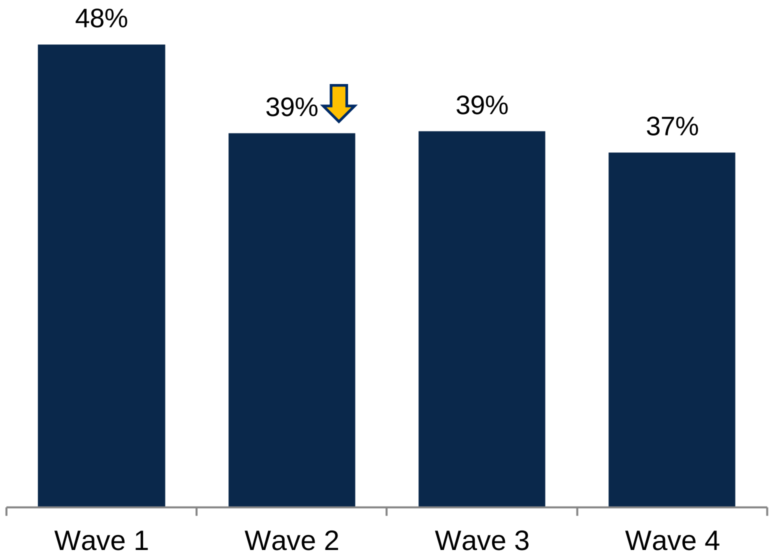
IK2. How knowledgeable would you say you currently are about…? How the UK trades with countries outside the European Union
Proportions stating that they are very or fairly interested.
Unweighted base sizes provided in parenthesis.
Statistical significance arrows represent significant differences against the average result.

4.4 Engagement

4.4.1 The percentage of respondents who reported seeing or hearing anything about how the UK trades with other countries remains stable.

Almost 2 in 5 respondents (37%) reported seeing, reading or hearing information about how the UK trades, or will trade, with other countries in the previous week (see Figure 5). This is in line with wave 2 and 3 but remains lower than figures for wave 1 (48%)[22].

Figure 5: Proportions of respondents saying they have seen or heard something in the last week about how the UK trades with other countries or will trade with them



FT1. In the last week, have you seen or heard anything about how the UK trades with other countries, or will trade with them in the future?
% stating 'Yes'
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224) / Random half sample (Wave 4 = 1968)
Only shown to 50% of the sample at random from wave 4. Shown to all respondents at waves 1 to 3. Comparisons to previous waves should be treated with caution.
Statistical significance arrows represent significant differences when compares to results observed at previous wave.

4.4.2 The most common themes respondents have come across are trade relationships with non-EU and EU countries

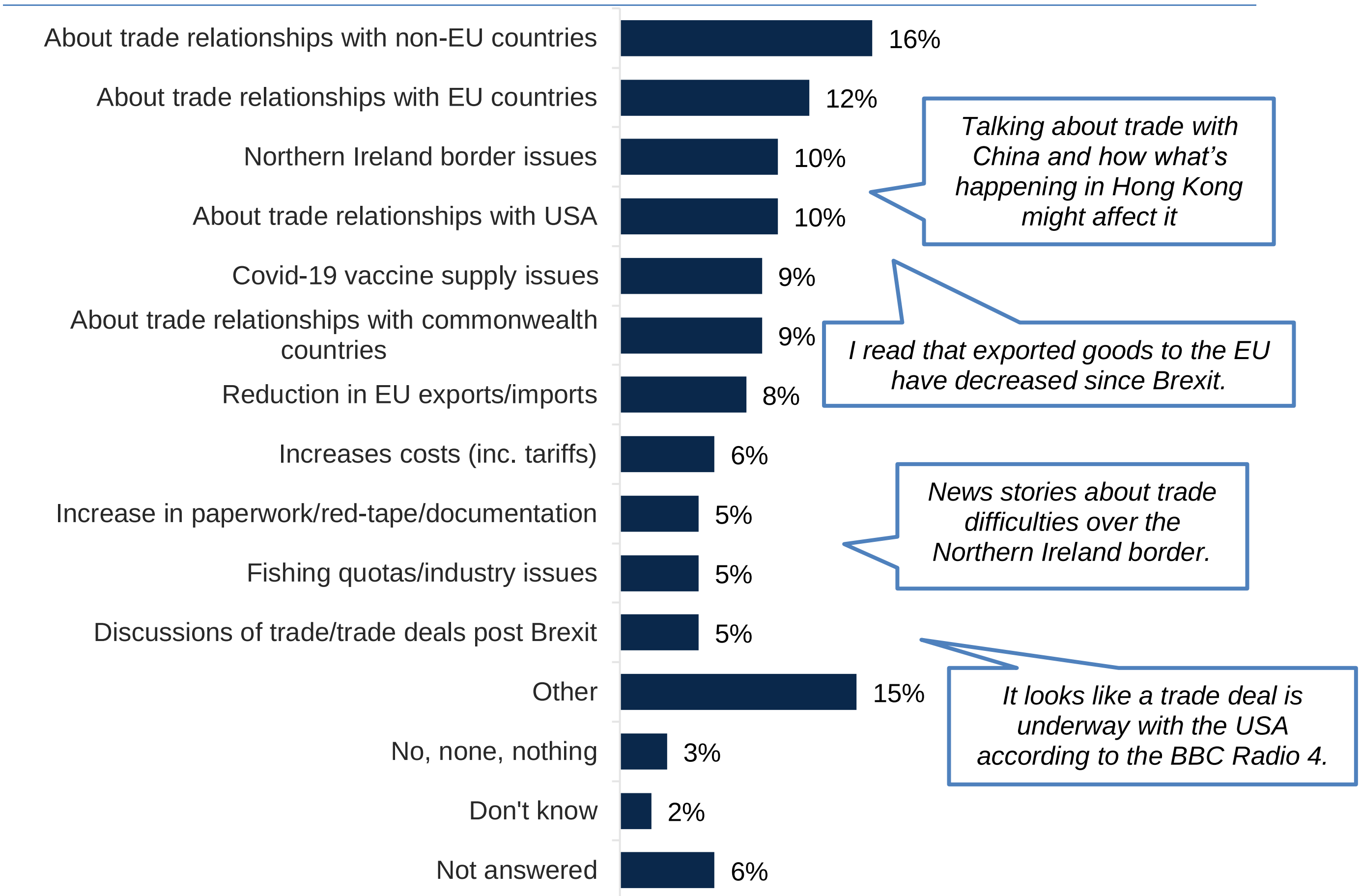
Those respondents who recalled having seen or heard something about how the UK trades with other countries in the previous week were asked to summarise what they had seen or heard in an open response question. Their answers were then coded into

[22] At wave 4 this question was asked to a random 50% of the sample, rather than to all respondents as it was done in waves 1 to 3. Although the results at wave 4 are consistent with previous bursts, they should be interpreted with this cautionary note in mind.

themes, each of which is presented in Figure 6 below.

The most commonly cited theme was trade relationships with non-EU countries, mentioned by 16% of respondents who had read, seen or heard something in the previous week. This is followed by trade relationships with EU countries (12%), Northern Ireland border issues (10%) and stories related to our trading relationship with the USA (10%).

Figure 6: Coded themes of what respondents had seen or heard in the previous week



FT2. …and can you provide a brief summary or description of what you have heard?[23]
Open response question.
Unweighted base size: where heard anything about how the UK trades with other countries (828)

4.4.3 A large decline in mentions of post-Brexit trade deals, trade relations with the USA, and lower standards/quality goods was observed. Meanwhile, vaccine supply, the reduction of EU exports and increased red tape are emerging issues.

Compared to wave 3, at the time of wave 4 fieldwork a considerably lower proportion of respondents said that they had seen or heard something around discussions of trade or trade deals post Brexit (5%, compared to 23% at wave 3). This also applies to trade relationships with the USA (10%, compared to 25% at wave 3), lower standards/quality of

[23] This question was coded as a multiple-response question rather than a single-response question. Consequently, themes are not exclusive and will add up to more than 100%.

goods (1%, compared to 16% at wave 3) and trade relationships with EU countries (12%, compared to 22% wave 3).

In contrast, Northern Ireland border issues (10%), COVID-19 supply issues (9%) and reductions in exports and imports from the EU (8%) were mentioned by around 1 in 10 respondents. These topics were not mentioned at all at wave 3.

Furthermore, 5% stated that they had seen or heard something about increases in paperwork/red tape, an issue which, again, was not mentioned in prior waves. A breakdown of these results has been included below in Table 3.

Table 3: Changes in themes respondents have seen or heard over time

Issue	Wave 1	Wave 2	Wave 3	Wave 4	Change (W4 vs. W3)
Discussions of trade/trade deals post Brexit	24%	13%	23%	5%	-18
About trade relationships with USA	8%	16%	25%	10%	-15
Lower standards/quality goods	1%	1%	16%	1%	-15
About trade relationships with EU countries	12%	5%	22%	12%	-10
Northern Ireland border issues	3%	2%	0%	10%	+10
COVID-19 vaccine supply issues*	0%	0%	0%	9%	+9
Reduction in EU exports/imports*	0%	0%	0%	8%	+8
No deal Brexit	3%	11%	6%	0%	-6
Increase in paperwork/red tape/documentation*	0%	0%	0%	5%	+5
About trade relationships with non-EU countries	11%	11%	19%	16%	-3
Increases costs (inc. tariffs)	2%	3%	3%	6%	+3

FT2. …and can you provide a brief summary or description of what you have heard?
Open response question
Base: where heard anything about how the UK trades with other countries (828)
Sorted by size of % point change between Wave 3 and 4.
**Issues less/not relevant in earlier waves.*

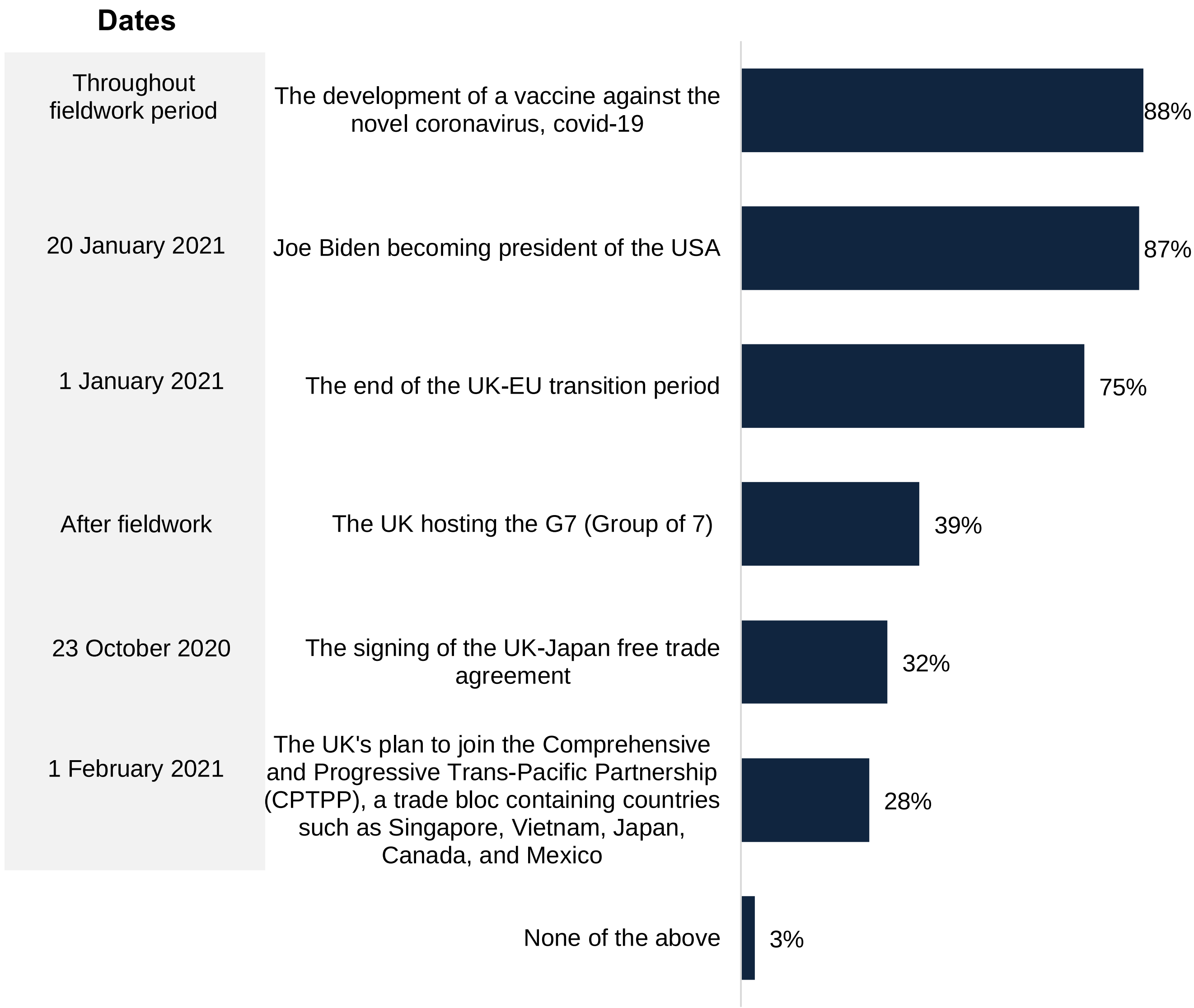
4.4.4 Around 1 in 3 respondents have heard stories about the signing of the UK-Japan free trade agreement and the government's plan to join the CPTPP.

Respondents were presented with a list of topics and asked which they recall having seen or heard about in the previous 3 months. This question included both trade specific stories and items not related to trade. Reference periods vary, but with the exception of the UK hosting the G7 - which took place after the fieldwork period - most items relate to early 2021 or were ongoing during the fieldwork period (for example the COVID-19 vaccine).

Results presented in Figure 7 show the end of the UK-EU transition period (75%) clearly cut through to a far greater degree than the signing of the UK-Japan free trade agreement (32%).

Fewer still (28%) say they had heard something about the government's plan to join the CPTPP.

Figure 7: Prompted topic recall



CV1. Which of the following topics do you recall having seen or heard about in the last 3 months?
Unweighted base size: random half sample (2041)
Only shown to 50% of the sample at random from wave 4. Shown to all respondents at waves 1 to 3.

4.4.5 Over a third report being aware of the UK-Japan free trade agreement, but most respondents who recall this say that they remember hearing about the negotiation objectives but not any specific topics.

In a separate question, respondents were specifically asked if they had heard something about the UK and Japan signing a free trade agreement. Just over 1 in 3 (36%) said they were aware of the UK-Japan free trade agreement[24].

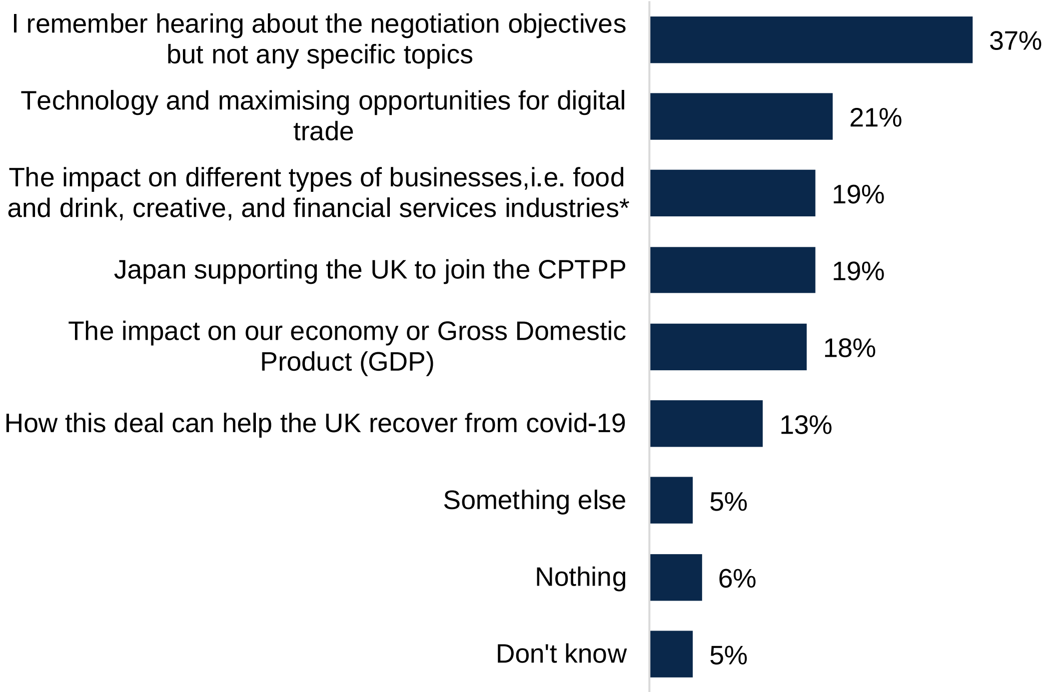
Those respondents who said they were aware were then asked what topics they had heard about, with a list of prompted topics.

As shown in Figure 8, almost 2 in 5 of those who said they had heard something said they remembered hearing about the negotiation objectives but not any specific topics (37%). Older generations are more likely to say they do not remember any specific topics (48% of those aged 65 to 74 and 54% of those aged 75+), while younger respondents are more likely to remember specific topics.

Around 1 in 5 remembered hearing or seeing something about technology and maximising opportunities for digital trade (21%). Similar proportions mentioned the impact on different types of businesses (19%), Japan supporting the UK to join the CPTPP (19%) and the impact of the UK-Japan FTA on the economy/GDP (18%).

[24] Figure 7 shows results for question CV1 which asked respondents whether they had seen or heard something about a series of topics in the last 3 months. At this question 32% said that they had heard something about the UK-Japan free trade agreement in the last 3 months. A separate question was asked, however, to understand whether respondents were aware of this agreement more generally (not limited to 3 months): ‘On 23 October 2020, the UK and Japan signed a free trade agreement between the 2 nations. Prior to today, were you aware of the UK-Japan free trade agreement?’ At this latter question, 36% of respondents stated that they were aware of the UK-Japan free trade agreement.

Figure 8: Recalled topics around the UK-Japan free trade agreement



JP2: What topics, if any, do you remember hearing about this?
Unweighted base size: where aware of Japan FTA (1624)
*Option text shortened slightly for chart formatting.

5 Support for free trade agreements and perceived impact

5.1 Support for free trade agreements

5.1.1 Support for establishing free trade agreements with countries outside the EU has significantly increased for the first time since the tracker began.

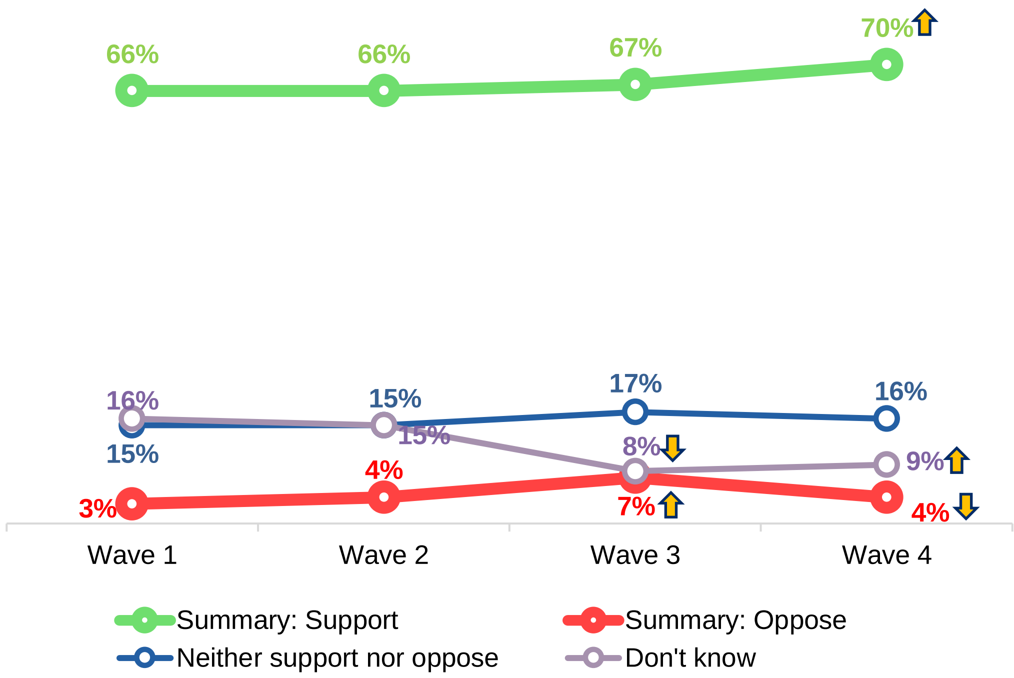
Respondents were asked about the extent to which they are supportive of the UK establishing free trade agreements with countries outside of the EU[25]. It is worth bearing in mind that changes were made to the question text at wave 3. Since then, this question focuses on support of establishing free trade agreements with countries outside of the EU, rather than measuring support of free trade agreements more generally. Despite changes to the question text, this question can still be used to measure support for free trade agreements in principle and has been compared with results from previous waves[26].

As Figure 9 shows, 7 in 10 respondents (70%) said they were supportive of the UK establishing free trade agreements with countries outside of the EU. This is significantly higher than the results reported in all previous waves (67% at wave 3, and 66% at waves 1 and 2). This includes 2 in 5 (40%) who were strongly supportive, again significantly higher than in previous waves (37% at waves 2 and 3, and 36% at wave 1).

Opposition to establishing free trade agreements with countries outside of the EU is very low, with just 4% of respondents opposed. Opposition has decreased significantly compared to wave 3 (7%) and is in line with waves 1 and 2 (3% and 4% respondents reported being opposed to FTAs respectively). A further quarter combined say they neither support nor oppose free trade agreements (16%) or are unsure (9%).

[25] The question specifically referenced “free trade agreements”. There is some evidence to suggest that changes in question wording can impact levels of support, with the public slightly more supportive of “free trade” as compared to “free trade agreements”. Please see: https://www.pewglobal.org/2018/09/26/americans-like-many-in-other-advanced-economies-not-convinced-of-trades-benefits/

Figure 9: Support and opposition to the UK establishing free trade agreements with countries outside the European Union



In waves 3 and 4: FT4. In general, would you say that you support or oppose the UK establishing free trade agreements with countries outside the European Union?
In waves 1 and 2: FT4. In general, would you say that you support or oppose free trade agreements?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009)
Statistical significance arrows represent significant differences when compared to results in the wave prior.

As with previous waves, the same differences between demographic subgroups exist. A closer look at the results reveals that support is higher within the following groups:

- men: by a margin of 12 percentage points, men (76%) are more likely than women (64%) to say they support the UK establishing free trade agreements with countries outside of the EU

- higher socio-economic grades (SEG): over 4 in 5 of those in SEG classifications AB (83%) support the UK establishing free trade agreements with countries outside of the EU. This compares to 7 in 10 (71%) respondents in SEG classifications C1C2, and 60% of respondents in grades DE

- older people: there is a steady increase in support as you go up the age scale. Over half (55%) of those aged 16 to 24 support the UK establishing free trade agreements with countries outside of the EU, rising to 86% of those aged 75+

- those with degree level qualifications: of those with degree or above level qualifications, 8 in 10 report being supportive of the UK establishing free trade agreements with countries outside of the EU (79%). This compares with 7 in 10 (71%) of those with non-degree qualifications, and 3 in 5 of those with no qualifications (60%)

As was noted in previous waves, we should be cautious when discussing differing levels of support within sub-groups. Stating that support is lower among certain groups may implicitly suggest that opposition is also higher. However, this is not the case. Consistent with previous waves, whilst support varies considerably between sub-groups, levels of opposition remain consistently low (rarely above the 10% mark). Instead, it is the proportions of those that select “neither support nor oppose”, or to a lesser extent those who say they “don’t know”, that vary quite considerably.

The largest changes in support among sub-groups compared to wave 3 can be observed among the following demographics. These are: those living in Scotland (+11 percentage points), those with non-degree level qualifications (+10 percentage points), those aged 75+ (+9 percentage points), and those living in London (+7 percentage points).

5.1.2 Around 7 in 10 of the most protectionist respondents still say they are supportive of free trade agreements with countries outside the EU.

Since wave 3, respondents were presented with pairs of statements and asked which statement their own views aligned most closely to[27]. The purpose of this question was to understand whether respondents have a more protectionist or liberal attitude towards international trade. Based on their responses, respondents were given a composite score and then split into 3 equal groups: most protectionist, middle, and least protectionist[28]. Levels of support and opposition for free trade agreements with countries outside the European Union within each group are shown in Figure 10 overleaf.

Highlighting the extent to which free trade agreements, at least generally, are popular, around 7 in 10 (71%) of the most protectionist respondents still say they are supportive of free trade agreements with countries outside the EU. Whilst higher than the average, just 6% are in opposition; 16% neither support nor oppose and 7% are unsure. The least protectionist respondents are most likely to support the UK establishing free trade agreements with countries outside of the EU (82%), whilst the middle group are the least supportive (58%).

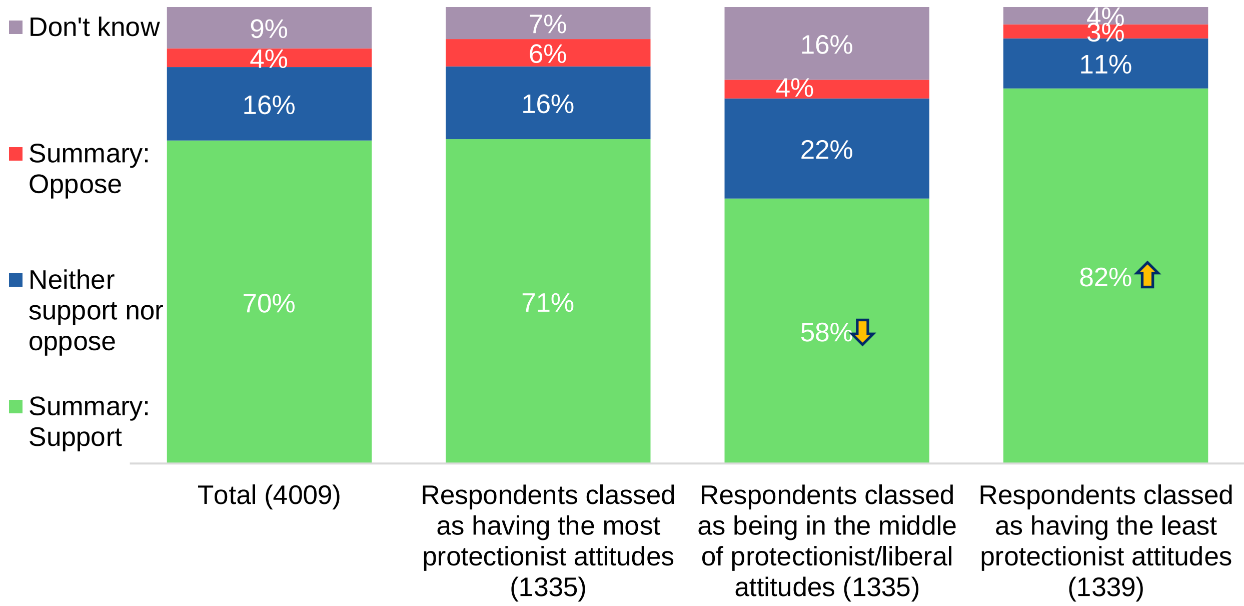
It may appear contractictory that respondents classed as having the most protectionist attitudes are still widely supportive of the UK signing free trade agreements with countries outside the EU. However, it should be noted that respondents in this groups might be more likely to take more protectionist positions on issues such as protecting UK jobs and industries, but still want to the UK to sign trade deals with countries outside the EU. Benefits such as greater exports and the positive impact on UK economy will still have appeal, even if the prospect of greater imports to these respondents may not be as attractive.

Those classed in the middle of the protectionist/liberal attitudes are less supportive due to being less engaged or interested in trade related issues[29]. Indeed, respondents in this

[27] See section 5.4.3 for further analysis of statements.
[28] Some respondents were not classified due to answering don’t know at 1 or more of the statements.
[29] Respondents in this group are more likely to have selected scores towards the middle of the scale on the statements measuring levels of protectionism, which can be an indication of being more unsure or having not having a view on the issue.

group are not more opposed than the average, but are instead more likely to select both neither agree nor disagree (22%) or don't know (16%).

Figure 10: Reported levels of support by level of protectionism



FT4. In general, would you say that you support or oppose the UK establishing free trade agreements with countries outside the European Union?
Unweighted base sizes provided in parenthesis.
Statistical significance arrows represent significant differences when compared to total. Only marked for support.

Regression analysis[30] was conducted to reveal the most significant drivers of support for the UK establishing free trade agreements with countries outside of the EU. Economic outlook is the most significant driver of support, with a relative importance score of 25%, the highest of any variable included in the model. Level of protectionism was also a significant driver with a score of 12%.

[30] A definition of regression analysis and further details on the regression analysis conducted can be found in the appendices section.

5.2 Future economic outlook

5.2.1 A third of respondents expect the UK economy to improve over the next 12 months.

The survey explored the economic outlook of respondents, asking whether they expect the general economic conditions of the country to improve, get worse or stay about the same in the next 12 months. This question has changed from wave 3, where respondents were asked how long they thought it would take for the UK economy to recover from the effects of COVID-19 once lockdown restrictions were lifted.

Overall, respondents were more optimistic than pessimistic about the general condition of the economy over the next year (see Table 4). Almost 2 in 5 (37%) expect the UK economy will improve, while a lower proportion (27%) expect the economy to perform worse than at present. The remainder say that it will stay the same (22%) or that they are unsure (14%).

The estimated economic outlook differs significantly by gender, with men more likely to expect an improvement than women. Around 2 in 5 (43%) men expect the economy to improve in the next year, compared to a third (32%) of women. Similarly, 30% of women expect the economic situation to get worse, compared to 24% of men.

Age also seems to play a role, with older generations being more optimistic than younger people. Whilst less than 3 in 10 (28%) of 16 to 24 year olds believe the economy will get better, almost half (45%) of those aged 55 or above do.

5.2.2 Those more pessimistic about the general economic condition of the country are more likely to think increased free trade will have a negative impact.

Figure 11, below, shows how attitudes towards the economy are linked to attitudes about the economic impact of free trade. This figure reports the impact on jobs and wages locally, but the results presented are selected as indicative of the relationship for other questions exploring perceived impact or support for free trade[31].

Taking the impact on local jobs as an example, 52% of those who believe the economy will improve think increased free trade will lead to more jobs overall. This compares to 29% of those who say the economy will get worse over the next year.

As with wave 3, these findings highlight that worsening perceptions may, therefore, not always be related to the specifics of trade, but more about the state of the economy and general levels of economic pessimism. Survey questions about trade-specific matters can often become proxies for respondents expressing their wider-held beliefs. Thinking about findings in this context continues to be important if results are to be properly interpreted.

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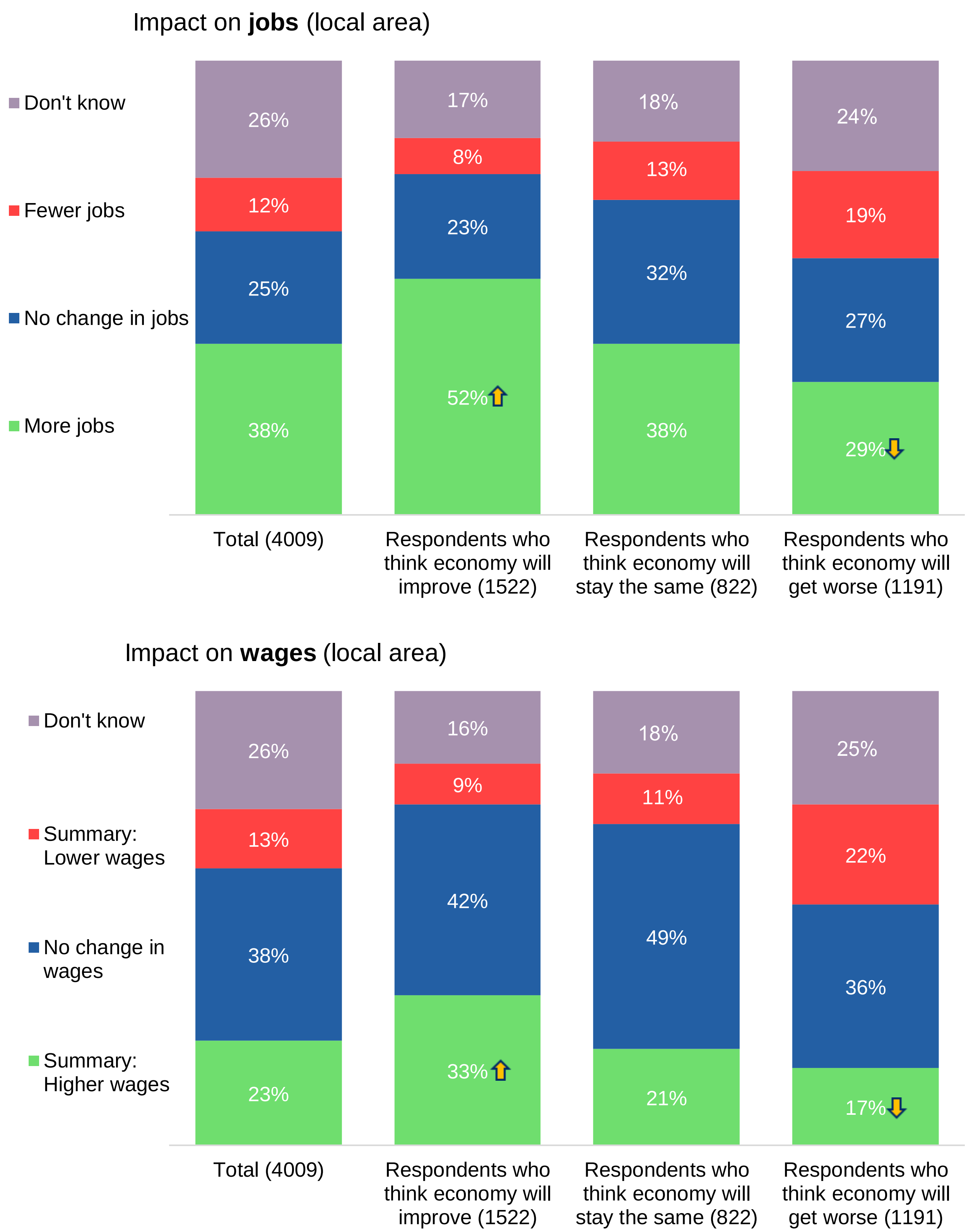
[31] Regression analysis at FT4 confirms that levels of economic optimism was a statistically significant driver of support for free trade agreements with countries outside the European Union. Full regression outputs are available in the appendix.

Figure 11: Impact of free trade on jobs and wages by economic outlook



UK3. Now thinking about both the UK as a whole and then just your local area, do you think that increased free trade would result in more jobs being created overall, or fewer jobs being created overall? UK4....still thinking about the UK as a whole, and then just your local area, do you think that increased free trade would result in higher wages, or lower wages? Base: all respondents (Wave 4 = 4009) Statistical significance arrows represent significant differences when compared to total. Only marked for more jobs/higher wages

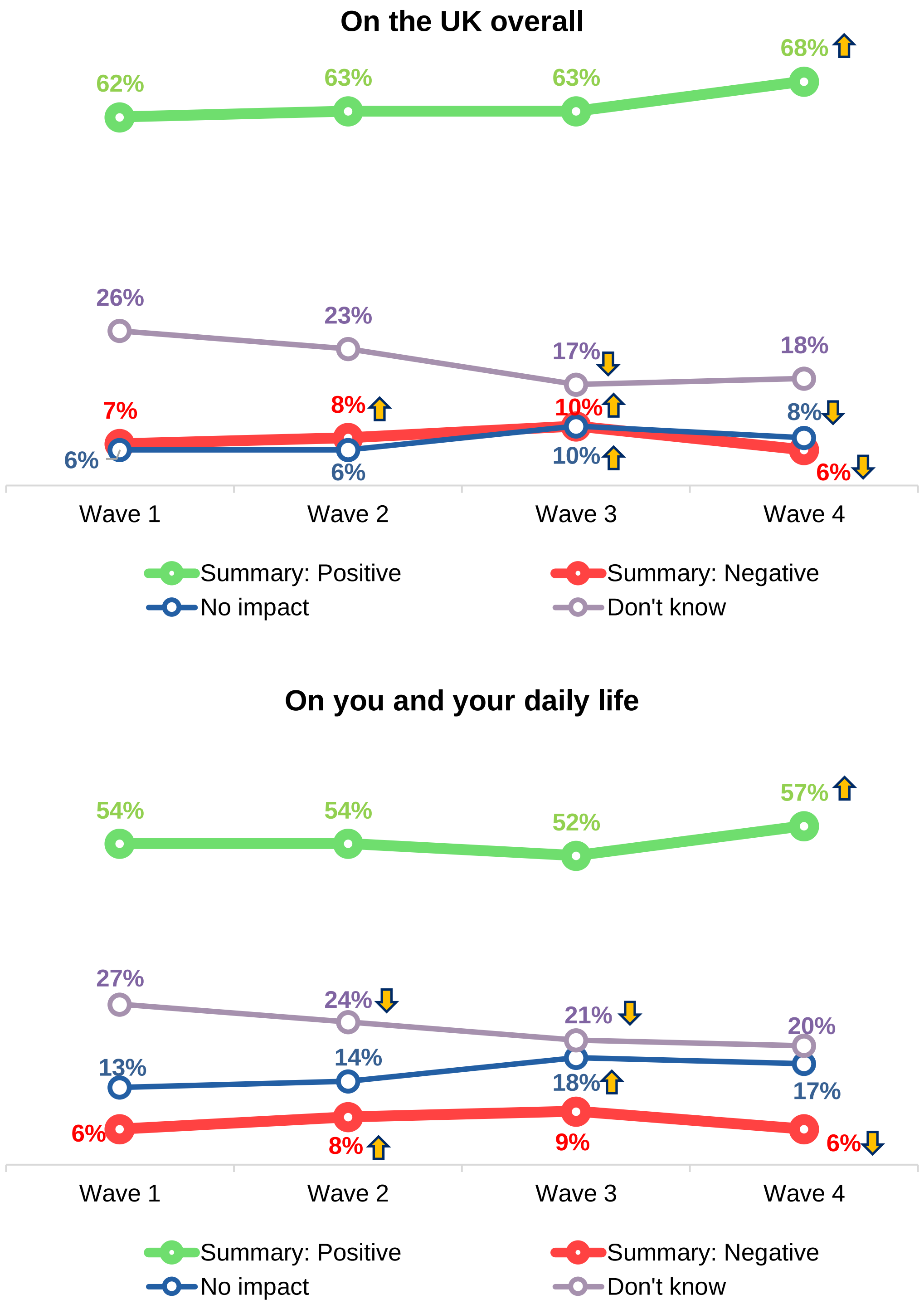
5.3 Perceptions of the impact of free trade agreements

5.3.1 Perceptions about both the UK wide and specific impacts of free trade agreements have become more positive.

As Figure 12 illustrates, around 2 in 3 (68%) think that signing free trade agreements with countries outside the EU would have a positive impact on *the UK overall* (versus 62% in wave 1 and 63% in waves 2 and 3). Likewise, 57% think that the effect will also be positive on their *daily lives* (versus 54% in waves 1 and 2, and 52% in wave 3). These figures represent the first significant increases in the proportions stating the impact will be positive for the UK overall and on people's daily lives since tracking began. This has been accompanied by a reduction in those who think the impact will be negative both at a UK and personal level. Only 6% stated that the impact will be negative at a UK or personal level, compared to 10% and 9% respectively in wave 3.

There is a gap between the proportion of respondents who state free trade agreements will have a positive impact on the UK overall (68%), and those who state they will have a positive impact on their daily lives (57%). This is a trend that has been observed in previous waves of the research. Its continuation highlights that respondents are often less sure about the immediate impact that free trade agreements may have on their daily lives. They instead view it as more of a national issue.

Figure 12: Perceived impact of free trade agreements on UK overall and daily life



UK1. In general, do you think that the UK signing free trade agreements with countries outside the European Union would have a positive impact or a negative impact on *the UK overall*?
UK2. In general, do you think that the UK signing free trade agreements with countries outside the European Union would have a positive impact or a negative impact *on you and your daily life*?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

5.3.2 Belief that free trade would lead to more jobs in the UK overall and in the local area has increased considerably, returning to similar levels witnessed in wave 1.

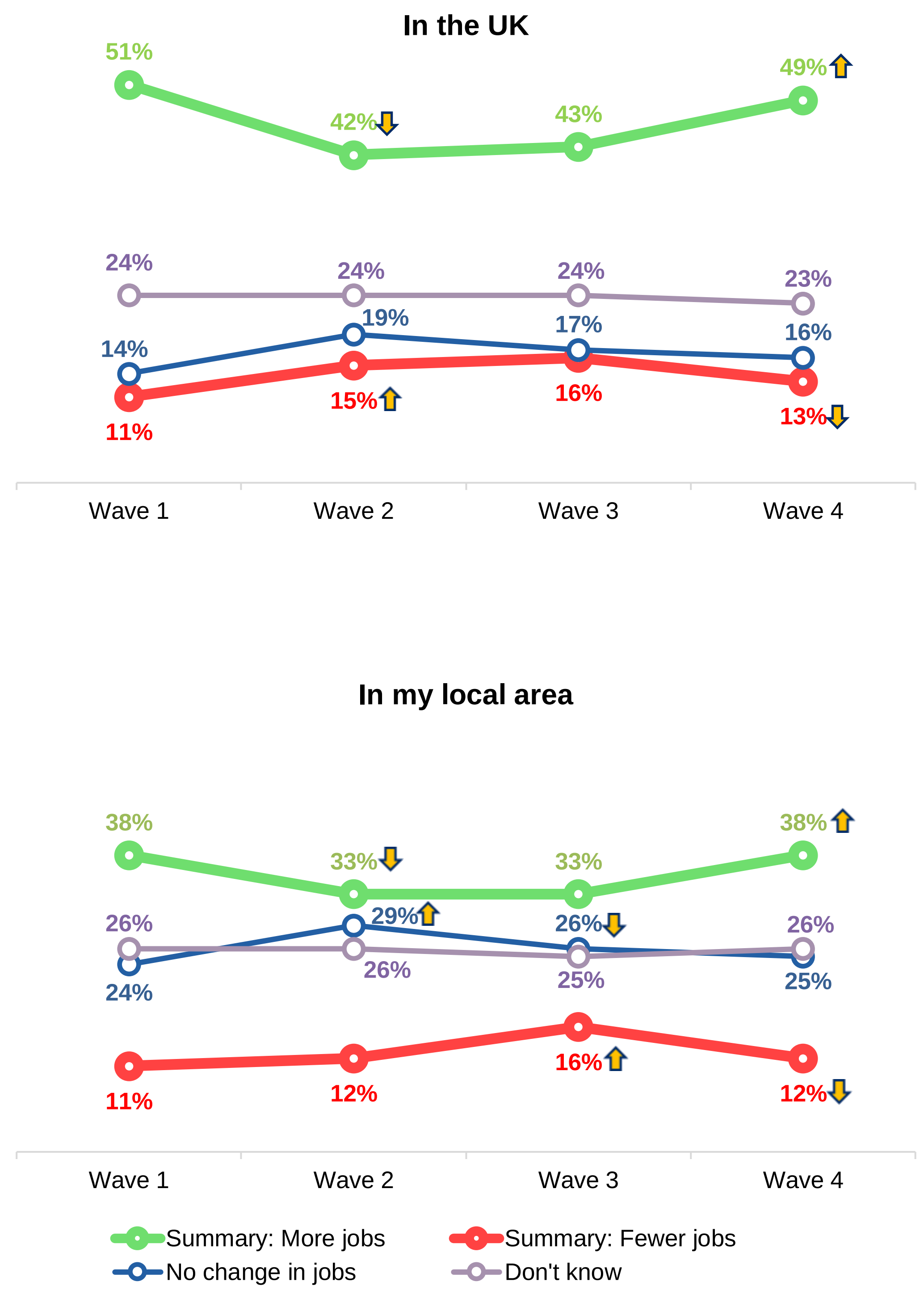
In addition to exploring the impact of free trade agreements in a more general sense, respondents were also asked about their perceptions of free trade with respect to the specific impacts. These included jobs, wages, the quality of goods and services, and prices.

Perceptions of the impact to jobs from free trade in wave 4 have improved compared to wave 3, especially when it comes to the impact to the UK overall. Wave 4 findings are now in line with wave 1 results. As is set out in figure 13, half (49%) of respondents stated that increased free trade would create more jobs in the UK overall, a significant increase compared to wave 3 (+6 percentage points). Meanwhile, 13% stated that increased free trade would mean fewer jobs, which also represents a significant change compared to wave 3 (-3 percentage points).

Belief that free trade would create more jobs in the local area has also increased, with nearly 2 in 5 (38%) selecting this compared to 33% at wave 3. This has been accompanied by a reduction of 4 percentage points in the proportion of respondents who believe that free trade would lead to fewer jobs locally, from 16% in wave 3 to 12%.

As with previous waves, however, there continues to be a notable difference in the proportions saying that free trade would result in an increase in jobs in the UK overall compared to in their local area. The size of the gap, at 11 percentage points, is essentially identical to what was observed at waves 2 and 3 (10 percentage point gaps respectively).

Figure 13: Perceived impact of free trade on job creation



UK3. Now thinking about both the UK as a whole and then just your local area, do you think that increased free trade would result in more jobs being created overall, or fewer jobs being created overall?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009).
Statistical significance arrows represent significant differences when compared to results in the wave prior.
Some figures may add to 101% due to rounding

5.3.3 There has been a small increase in the proportion who feel that free trade would lead to higher wages, reversing a downward trend seen throughout waves 2 and 3.

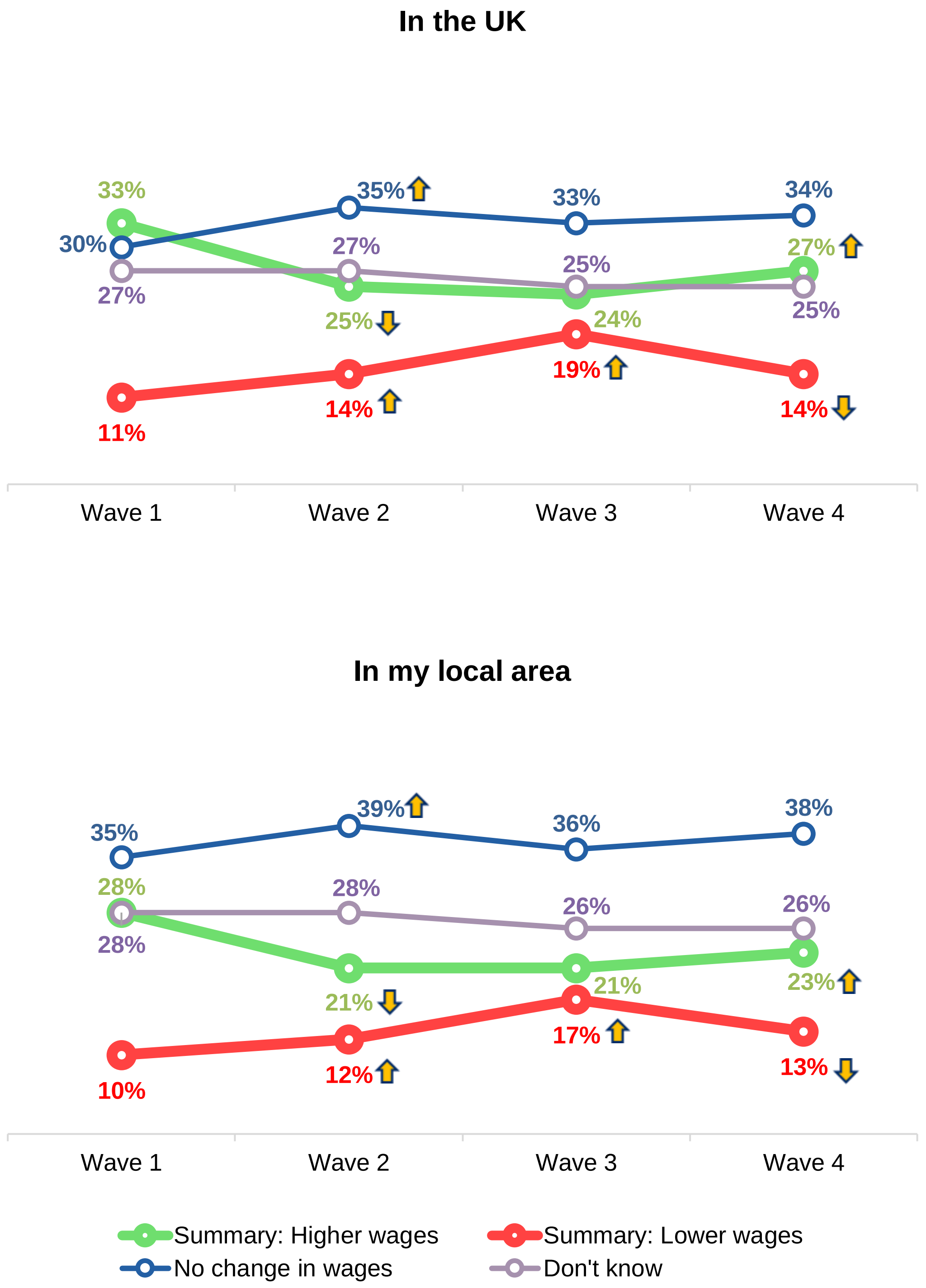
As with jobs, we also see an increase in the proportions of respondents believing that more free trade will lead to higher wages at both a national and local level (see Figure 14).

Just over a quarter (27%) believe that an increase in free trade would lead to higher wages in the UK overall, an increase of 3 percentage points since wave 3 (24%). This is matched by a reduction in those who believe wages would decrease, from 19% in wave 3 to 14% in wave 4. These changes bring results back in line with levels witnessed at wave 2, but are still less positive than results from wave 1.

Just under a quarter (23%) also expect wages to go up in their local area as a result of increased free trade, representing an increase of 2 percentage points compared to wave 3 (21%). Similarly, the proportion who believe that increased free trade would result in lower wages has gone down by 4 percentage points (from 17% in wave 3 to 13% in wave 4).

Perceptions that increased free trade will lead to lower wages in the UK are more common among respondents more likely to be of working age (under 65). For example, 21% of respondents aged 16 to 24 felt that increased free trade would lead to lower wages in the UK, compared to 8% of those aged 65 to 74 and 7% of those aged 75+.

Figure 14: Impact of trade on wages



UK4. Do you think that increased free trade would result in higher wages or lower wages? In the UK
UK4. Do you think that increased free trade would result in higher wages or lower wages? Your local area
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

5.3.4 Improved opportunities, free trade being generally good for the economy, and lower prices continue to be the main reasons why people think increased free trade will have a positive impact on the UK.

Respondents were asked in an open response format to say why they felt the impact on the UK overall would be positive or negative[32].

Figure 15 shows the responses for those who stated the impact would be positive (68% of respondents). As in wave 3, the most cited reason was improved trading opportunities (24%). Meanwhile, others gave responses along the lines of "free trade is good" (18%) or that free trade is good for the economy (15%).

This was followed by lower prices (14%), the need to form trading links with non-EU countries (9%), and more choice (9%).

Figure 15: Reasons for perceived positive impact of free trade on UK overall

UK1a. What makes you say this?
Open response question[33].
Unweighted base size: where people believe trade will have positive impact on UK (2,818)
Please note that coded responses that did not reach a threshold of 3% have not been presented on this chart.

[32] The question text was routed on the basis of the response at UK1.
[33] This question was coded as a multiple-response question rather than a single-response question. Consequently, themes are not exclusive and will add up to more than 100%.

5.3.5 The need to create links with non-EU countries has become a more prominent reason for thinking that increased free trade will have a positive impact on the UK

Table 4 shows the largest changes that can be observed between waves 3 and 4 when analysing reasons for believing that free trade will have a positive impact on the UK.

The proportion of respondents citing the need to form trade links with countries outside of the EU has increased by 5 percentage points compared to wave 3. Perceptions that free trade is generally good or good for the economy, that it gives more control/flexibility or that it would improve international relations have also gone up (by 3 percentage points respectively).

In contrast, a lower proportion of respondents said that free trade gives the UK more bargaining power compared to wave 3 (-2 percentage points).

Table 4: Reasons for perceived positive impact of free trade on UK overall - largest changes between waves 3 and 4

Theme	W3	W4	Change (W4 vs. W3)
Need to form trading links with non-EU countries	4%	9%	+5
Trade/free trade is good	15%	18%	+3
Good for the economy	12%	15%	+3
Gives more control/flexibility	1%	4%	+3
It would improve international relations	1%	4%	+3
Lower prices	12%	14%	+2
It's good/beneficial (unspecified)	7%	5%	-2
Not answered	7%	5%	-2
Gives UK more bargaining power	5%	3%	-2

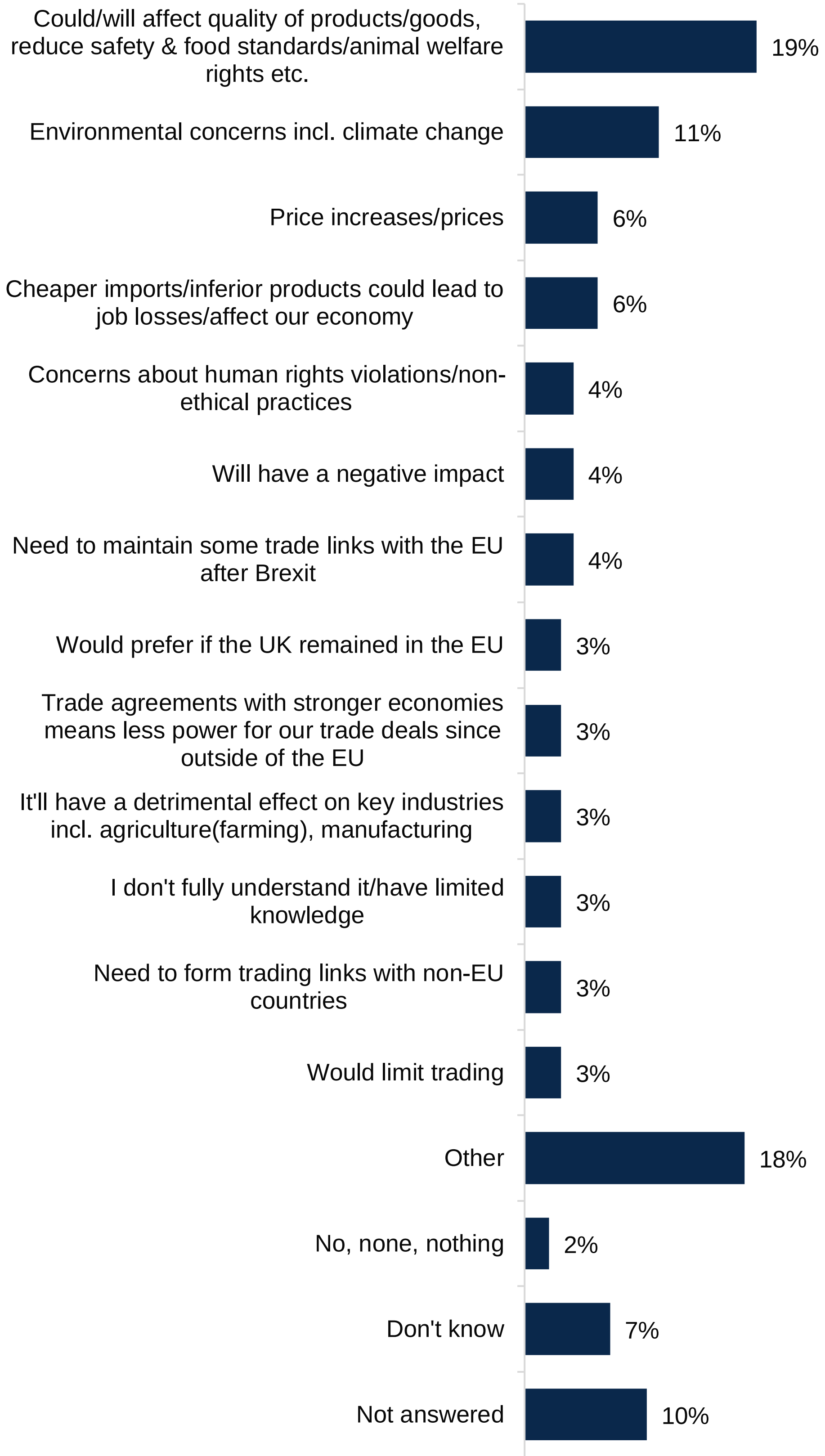
UK1a. What makes you say this?
Open response question.
Base: where believe will have positive impact on UK (Wave 3 = 2040, Wave 4 = 2818)
Please note that coded responses that did not reach a threshold of 3% have not been presented on this chart. Table sorted by size of % point change between Wave 3 and 4.

5.3.6 Impact on quality and standards is still the overriding concern among those who believe the impact of increased free trade on the UK will be negative.

Examining the results for those who believe increased free trade would negatively impact the UK overall (6% of respondents), one particular theme stands out (see Figure 16). One in 5 (19%) respondents said that it could affect the quality of goods/services and reduce safety and food standards, including animal welfare. Privatisation of the NHS was included in this code in the waves 1 to 3 reports. This has now been analysed as a separate code, showing just 1% of respondents who believe increased free trade would negatively impact the UK mentioning NHS privatisation specifically. This compares to 2% at wave 3, 3% at wave 2 and 1% at wave 1.

The next most commonly cited themes were concerns about the environment and/or climate change (11%), price increases/prices (6%) and cheaper/inferior products leading to job losses or impacting the economy (6%).

Figure 16: Reasons for perceived negative impact on UK overall



UK1a. What makes you say this?
Open response question.
Unweighted base size: where believe will have negative impact on UK (291)
Please note that coded responses that did not reach a threshold of 3% have not been presented on this chart.

5.3.7 Although impact on quality and standards is still the overriding concern among those who believe the impact of increased free trade on the UK will be negative, mentions have declined.

As Table 5 shows, among those who believe the impact of increased free trade on the UK to be negative, there have been changes in the reasons they think this. There has been a 12 percentage point decrease in the proportion of respondents who state that free trade would affect the quality of products/goods, reduce safety and food standards or animal welfare rights.

Although to a lesser degree, a lower proportion of respondents cited that trade agreements with stronger economies means less power for our trade deals since we are outside of the EU (-3 percentage points).

Table 5: Reasons for perceived negative impact on UK overall - largest changes between waves 3 and 4

Theme	W3	W4	Change (W4 vs. W3)
Could/will affect quality of products/goods, reduce safety & food standards/animal welfare rights	31%	19%	-12
Need to form trading links with non-EU countries	0%	3%	+3
I don't fully understand it/have limited knowledge	0%	3%	+3
Trade agreements with stronger economies means less power for our trade deals since outside of the EU	6%	3%	-3
Environmental concerns incl. climate change	9%	11%	+2
Greater levels of competition	0%	2%	+2
It's just how I feel/just an opinion	0%	2%	+2

UK1a. What makes you say this?
Open response question.
Unweighted base size: where believe will have negative impact on UK (Wave 3 = 425, Wave 4 = 291)

5.3.8 Perceptions around the impact on the price of goods and services have not changed. However, a lower proportion of respondents expect the quality to be lower, reversing a trend seen throughout waves 2 and 3.

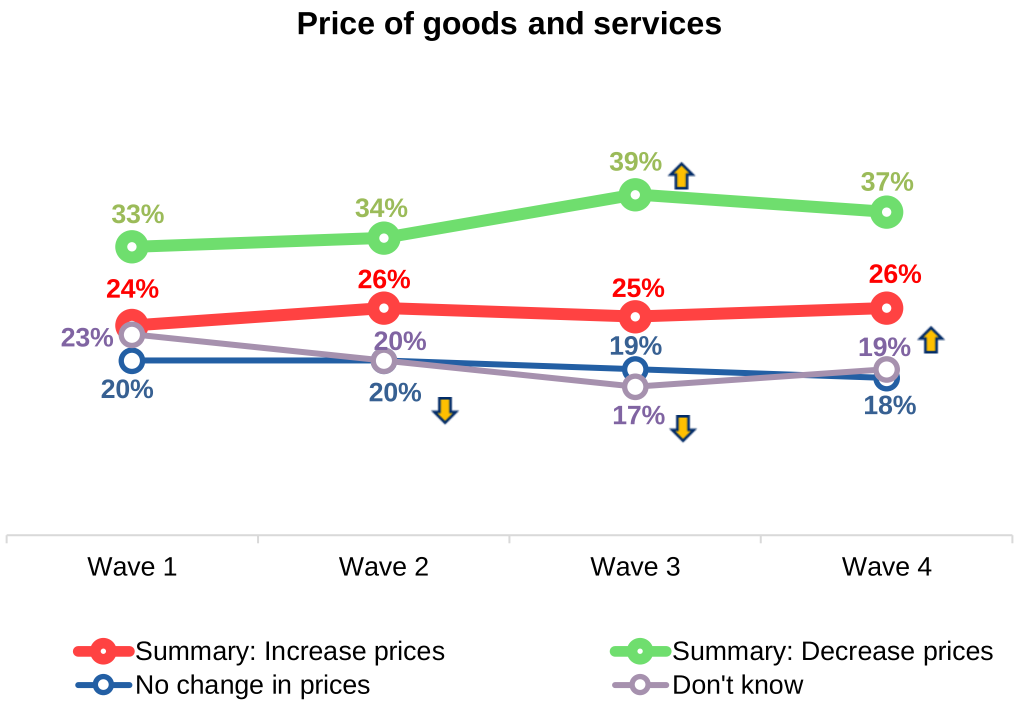
The proportions of respondents who expect prices to drop or increase as a result of increased free trade have remained stable compared to wave 3 (see Figure 17). In wave 4, 37% of respondents believe prices would decrease (versus 39% in wave 3) and a quarter (26%) believe the opposite would be the case (25% in wave 3).

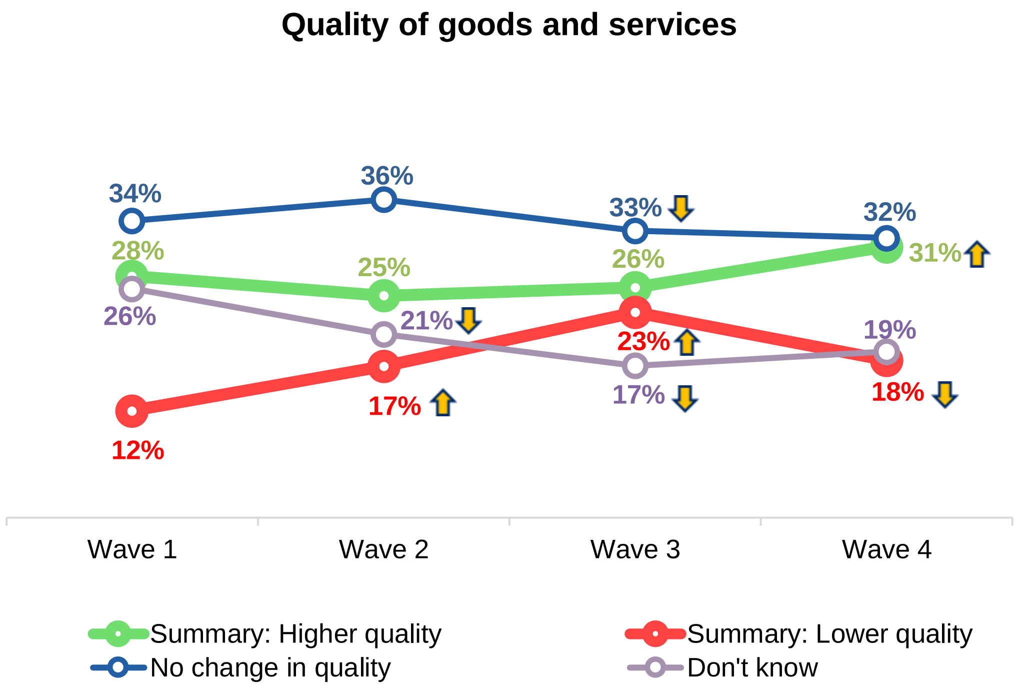
Looking at these results by sub-groups, men (42%) are significantly more likely than women (33%) to think that free trade will lead to lower prices. Those in the South West are more likely than average to believe free trade will lead to reduced prices (42%), as are those with degree or above level qualifications (48%) and those in socio-economic grades AB (48%). Conversely, people from BAME backgrounds are more likely to believe that free trade will lead to higher prices (30%). This is also the case of both extremes of the age groups (31% of those aged 16 to 24, 31% of those aged 65 to 74 and 30% of those aged 75+).

Whilst views around the effect of free trade on prices are in line with wave 3, there has been an increase in those who would expect it to lead to better quality goods and services. Three in 10 (31%) would expect increased free trade to lead to higher quality. This is 5 percentage points more than in wave 3 (26%) and the highest score since tracking began. Moreover, the proportion who feel it would lead to lower quality goods and services (18%) has gone down compared to wave 3 (23%). Around a third (32%) feel increased free trade would have no impact on quality (versus 33% in wave 3).

Changes in attitudes towards the quality of goods and services seems to be driven by region and ethnicity. The largest increases by region can be observed in the North East and the West Midlands, where the proportion of respondents who think quality would be better has increased by 13 and 9 percentage points respectively. Most of the results for the other regions have also improved albeit to a lesser extent (with the exception of Yorkshire and the Humber and Wales where results remain stable compared to wave 3). In terms of ethnicity, BAME respondents are now more likely to believe increased free trade would lead to better quality goods and services (+11 percentage points, from 30% in wave 3 to 41% in wave 4). The proportion of White respondents who are more likely to believe increase free trade will lead to better quality goods and services has also gone up albeit to a lesser extent (+4 percentage points).

Figure 17: Impact of trade on the quality of goods and services and prices





UK5. Thinking about just the UK as a whole, do you think that increased free trade would result in an increase in the price of goods and services, or a decrease in the price of goods and services?
UK6. Still thinking about the UK as a whole, do you think that increased free trade would result in the availability of higher quality goods and services, or lower quality of goods and services?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

5.4 The Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)

5.4.1 Awareness of the CPTPP has not changed since wave 3

The survey explored awareness of and attitudes towards the UK joining the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). CPTPP is a trade agreement between 11 countries (Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore, and Vietnam), covering around 500 million people and representing 13% of global GDP in 2020[34]. The UK submitted its application to join CPTPP on 1 February 2021 and on 2 June, the CPTPP Commission formally invited the UK to begin accession negotiations. Negotiations are now underway, with conversations taking place between the UK and member countries since July about the terms of accession.

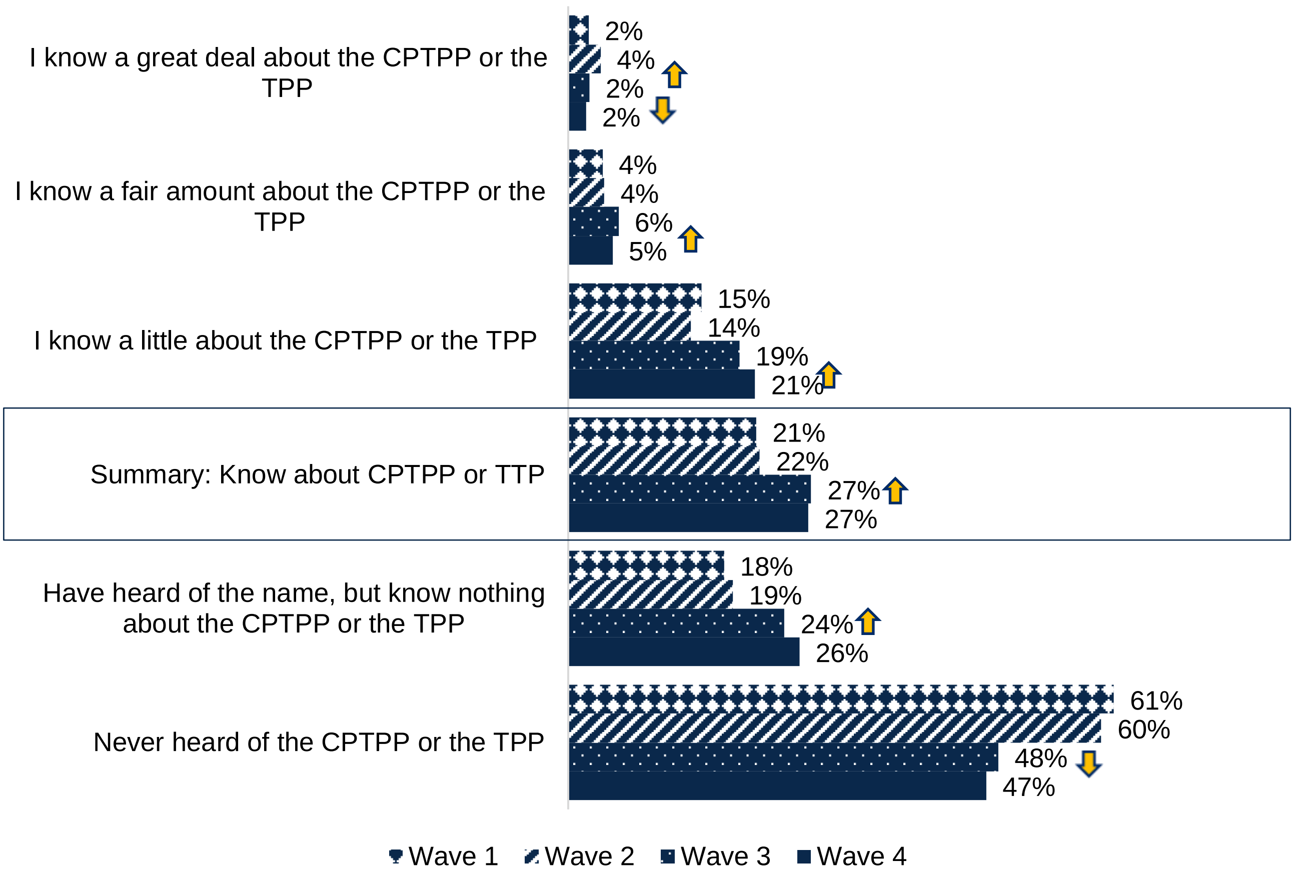
Awareness is stable compared to wave 3 (see Figure 18), with 27% knowing at least a little about CPTPP or its predecessor, the Trans-Pacific Partnership (TPP) (also 27% in wave 3). Around a quarter (26%) of respondents have heard of the name but otherwise have no knowledge about it, also in line with the last wave (24%). Around half (47%) of respondents have no awareness (48% in wave 3).

Awareness in waves 3 and 4 continues to be higher than in previous waves. However, some caution is recommended when comparing results from the 2 first waves with those of the 2 most recent waves, given the change in data collection methodology at wave 3. This change to methodology appears to have had more of an impact on questions around knowledge and awareness, so this question is particularly susceptible to increased overclaim[35].

[34] From https://www.bbc.co.uk/news/explainers-55858490

[35] When comparing wave 2 push-to-web completes and wave 3 push-to-web completes, the levels of awareness are consistent, suggesting that this shift may be being driven at least in part by changes to the methodology.

Figure 18: Awareness of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) or the Trans-Pacific Partnership (TPP)



CPTPP. How aware are you of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) formerly known as Trans-Pacific Partnership (TPP)?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

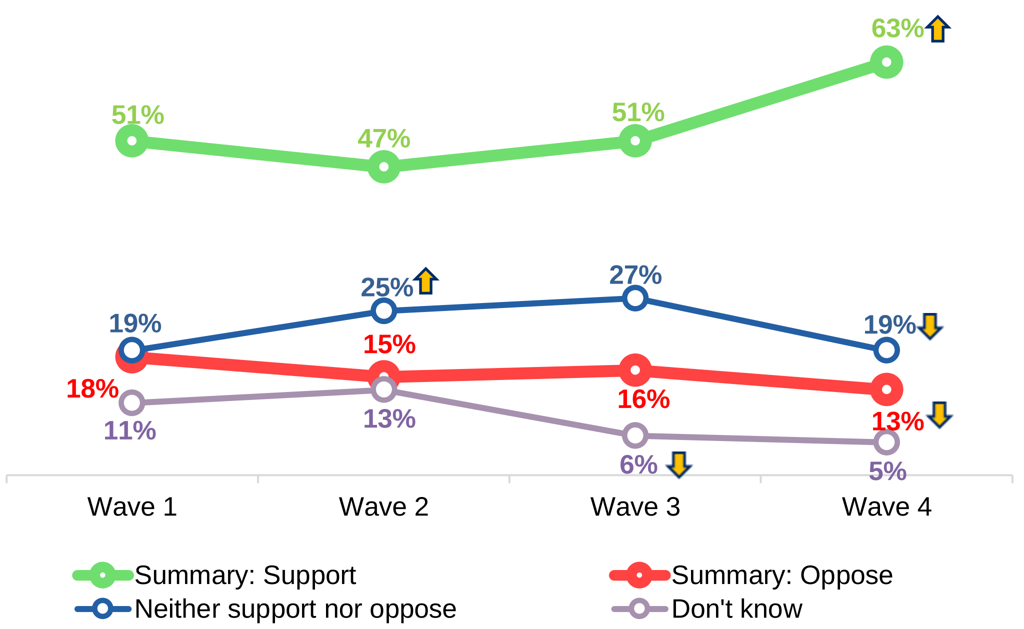
5.4.2 Support has significantly increased among those who have heard at least a little about the CPTPP.

Respondents were then asked about whether they would support the UK joining the CPTPP agreement (see Figure 19). It is worth noting that in waves 1 to 3 this question was only asked to those who indicated some degree of awareness of the agreement (beyond simply reporting having heard of the name alone). In wave 4 all respondents were asked this question. To make results comparable to previous waves, wave 4 results shown in Figure 19 are based just on those who have some degree of awareness of the CPTPP.

Support amongst those who indicated awareness of the agreement is 63%. This is 12 percentage points higher than the levels of support at wave 3 (51%) and the highest score since tracking began. Levels of opposition have declined albeit to a lesser extent, with 13% opposed (versus 16% at wave 3).

Support among those who indicated awareness of the agreement is higher than for all respondents (63%, compared to 49%). However, opposition is also higher among those who have some awareness of the CPTPP compared to all respondents (13%, compared to 7%).

Figure 19: Support for the UK to join the CPTPP



CPTPPa. To what extent would you support or oppose the UK joining the CPTPP?
Unweighted base sizes: respondents who know at least a little about the CPTPP or TPP (Wave 1 = 538, Wave 2 = 529, Wave 3 = 958, Wave 4 = 1206)
Statistical significance arrows represent significant differences when compared to results in the wave prior.

5.4.3 The UK public tend to favour a liberal agenda when it comes to tax-free free trade and the worldwide supply of essential goods. However, protectionist views are most evident when it comes to cross-border sharing of data.

Using a grid format, 5 questions using a 0 to 10 scale with statements expressing opposing sentiments about liberal trade at each end were put to respondents. The results have been presented in Figure 20 and Figure 21, which show that the UK public tends to show preference towards liberal free trade attitudes rather than protectionist positions.

Almost half (47%) of respondents gave a score of 7 and above, thus showing preference towards free trade as an effective way for the economy and businesses to grow. Just 8% gave a score of 0 to 3 showing preference towards the notion that it is best to protect our own domestic industries.

Likewise, 2 in 5 (41%) gave a score of 7 and above favouring prioritising the worldwide supply of essential goods, allowing food and medicines to cross borders. Just 13% favour the notion of preventing UK goods from being exported at the other end of the scale (scores 0-3).

One area where there are higher levels of agreement at the protectionist end of the scale is with respect to the cross-border sharing of data. Half (50%) of respondents favour tight controls to be placed on the cross-border sharing of consumer data to ensure everyone's privacy is protected and data is used appropriately (giving a score between 7 and 10). Considerably fewer respondents prefer consumer data being shared freely and openly across borders to support innovation, collaboration and boost economic growth (12%)[36].

For the 2 remaining pairs of statements, protectionist and liberal sentiments are more evenly split. Around a quarter (26%) show preference towards embracing international trade as part of the economic recovery following COVID-19. A similar proportion (29%) are inclined to say that the UK should become more self-sufficient and less reliant on imports. Similarly, while around 2 in 5 (21%) favour signing agreements with as many countries as possible, a third (33%) are more supportive of building our own industries to supply ourselves.

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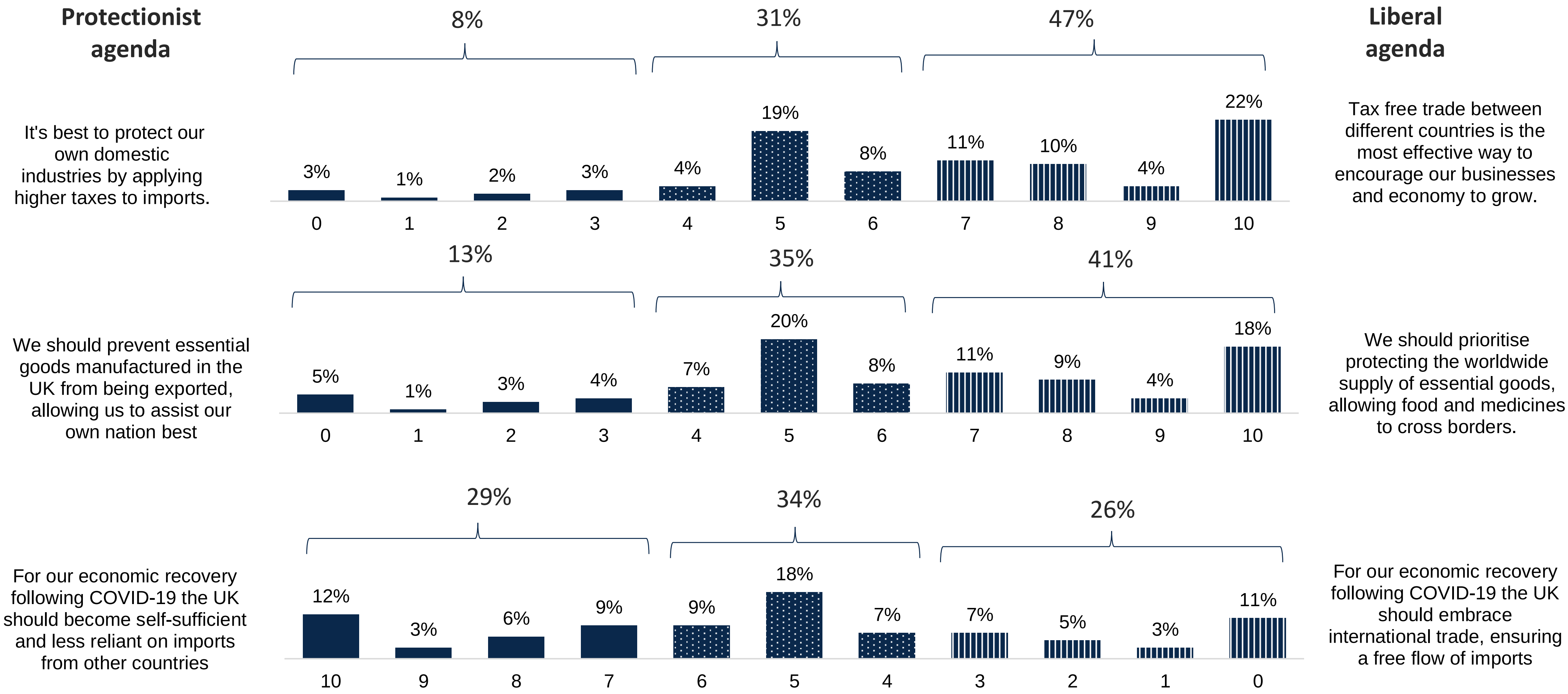
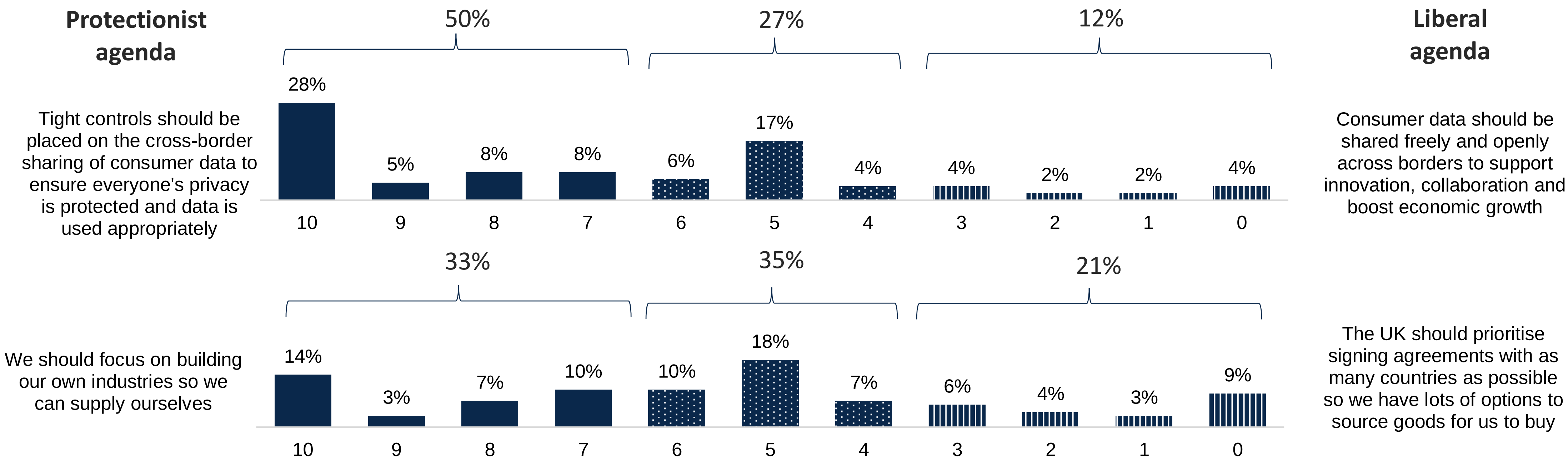
[36] The scale was ‘flipped’ for this statement with scores at the 'liberal' end of the scale measured by combining the total number of respondents selecting between 0 and 3.

Figure 20: Protectionist versus liberal free trade attitudes



CV2: Here are some pairs of statements. Please indicate where your own view lies on a 10-point scale where 0 means complete agreement with the statement on the left, 10 means complete agreement with the statement on the right, and 5 means you don't agree with either of the statements or that your views are mixed or balanced on the issue in question.
Unweighted base size: all respondents (4009).

Figure 21: Protectionist versus liberal free trade attitudes (2)



CV2: Here are some pairs of statements. Please indicate where your own view lies on a 10-point scale where 0 means complete agreement with the statement on the left, 10 means complete agreement with the statement on the right, and 5 means you don't agree with either of the statements or that your views are mixed or balanced on the issue in question. Unweighted base size: all respondents (4009)

5.4.4 Protectionist sentiment has declined since wave 3, including on attitudes to COVID-19.

Building on the results from Figure 20 and Figure 21, table 6 shows the differences in levels of protectionism and liberalism between waves 3 and 4[37].

As shown below, protectionist positions have declined compared to wave 3. A significantly lower proportion of respondents prefer higher taxes for imports (8% versus 12% at wave 3), preventing UK goods from being exported (13% versus 18%) and becoming self-sufficient to recover economically from COVID-19 (29% versus 35% at wave 3).

This, however, does not necessarily mean that the UK public's views have become more liberal. Liberal sentiments have only increased in relation to tax free trade to encourage economic and business growth (47%, compared to 43% at wave 3). When it comes to exporting UK goods and the economic recovery from COVID-19, opinions have shifted towards a middle ground rather than a liberal position.

[37] The 2 pairs of statmenents that have not been included in Table 6 were not asked at wave 3 so comparisons cannot be made.

Table 6: Protectionist versus liberal free trade attitudes - differences between wave 3 and wave 4

Question scale Protectionist end	Question scale Liberal end	Protectionist sentiment Wave 3	Protectionist sentiment Wave 4	Liberal sentiment Wave 3	Liberal sentiment Wave 4
It's best to protect our own domestic industries by applying higher taxes to imports	Tax free trade between different countries is the most effective way to encourage our businesses and economy to grow	12%	8%⇩	43%	47%⇧
We should prevent essential goods manufactured in the UK from being exported, allowing us to assist our own nation best	We should prioritise protecting the worldwide supply of essential goods, allowing food and medicines to cross borders	18%	13%⇩	40%	41%
For our economic recovery following COVID-19 the UK should become self-sufficient and less reliant on imports from other countries	For our economic recovery following COVID-19 the UK should embrace international trade, ensuring a free flow of imports	35%	29%⇩	27%	26%

CV2: Here are some pairs of statements. Please indicate where your own view lies on a 10-point scale where 0 means complete agreement with the statement on the left, 10 means complete agreement with the statement on the right, and 5 means you don't agree with either of the statements or that your views are mixed or balanced on the issue in question Base: all respondents (Wave 3 = 3224, Wave 4 = 4009)

6 Trading partner preferences

6.1 Support for establishing free trade agreements with specific countries

6.1.1 Support for establishing an FTA with Brazil is quite low, although slightly higher than support for deals with the UAE and Saudi Arabia. These 3 countries show a relatively high proportion of respondents who are undecided or don't know.

Respondents were presented with 8 non-EU countries and asked to what extent they would support or oppose the UK establishing a free trade agreement with them. Five countries put to respondents remained identical to those asked about in waves 1 to 3; Brazil, UAE and Saudi Arabia were added at wave 4. The findings are presented in Table 7.

Securing a free trade agreement with Australia and New Zealand still draws widespread support (64% respectively), with support for the USA above half too (57%). Opposition to trade with these countries is also low at below 15% of respondents. Whilst less than half support a free trade agreement with India (40%), Brazil (34%) and UAE (30%), support is still higher than opposition. However, the difference between support and opposition is narrow when it comes to China and Saudi Arabia (2 and 4 percentage points difference respectively).

Table 7: Support and opposition for establishing free trade agreements

	Australia	New Zealand	USA	India	China	Brazil	UAE	Saudi Arabia
Strongly support	37%	38%	28%	15%	11%	10%	10%	9%
Somewhat support	27%	26%	29%	25%	21%	24%	20%	18%
Neither support nor oppose	15%	15%	17%	28%	23%	33%	29%	29%
Somewhat oppose	4%	4%	8%	10%	16%	9%	13%	13%
Strongly oppose	2%	2%	5%	6%	13%	4%	8%	11%
Don't know	14%	14%	14%	16%	15%	20%	20%	20%
Summary: support	**64%**	**64%**	**57%**	**40%**	**32%**	**34%**	**30%**	**27%**
Summary: oppose	**7%**	**6%**	**13%**	**16%**	**29%**	**13%**	**20%**	**24%**
NET score	**+57%**	**+58%**	**+44%**	**+24%**	**+2%**	**+21%**	**+10%**	**+4%**

TP2. To what extent would you support or oppose the UK establishing a free trade agreement with each of the following countries?Unweighted base sizes: all respondents (4009)

6.1.2 Support for FTAs with China and USA has increased compared with wave three.

Figure 22 shows how support for free trade agreements with individual countries has changed over the waves. Support for free trade agreements with Australia and New Zealand has stayed the same compared to wave 3, with 64% of respondents in favour of establishing FTAs with both of these countries. For India, support continues to decline, following a downward trend observed in previous waves (from 58% in wave 1 to 40% in wave 4). Support however is still higher for a deal with India than for China, Brazil, Saudi Arabia and UAE. The downward trends in support for FTAs with the USA and China have been reversed at wave 4, with support for these countries increasing for the first time.

Close to 3 in 5 (57%) now support establishing an FTA with the USA (+8 percentage points compared to wave 3).

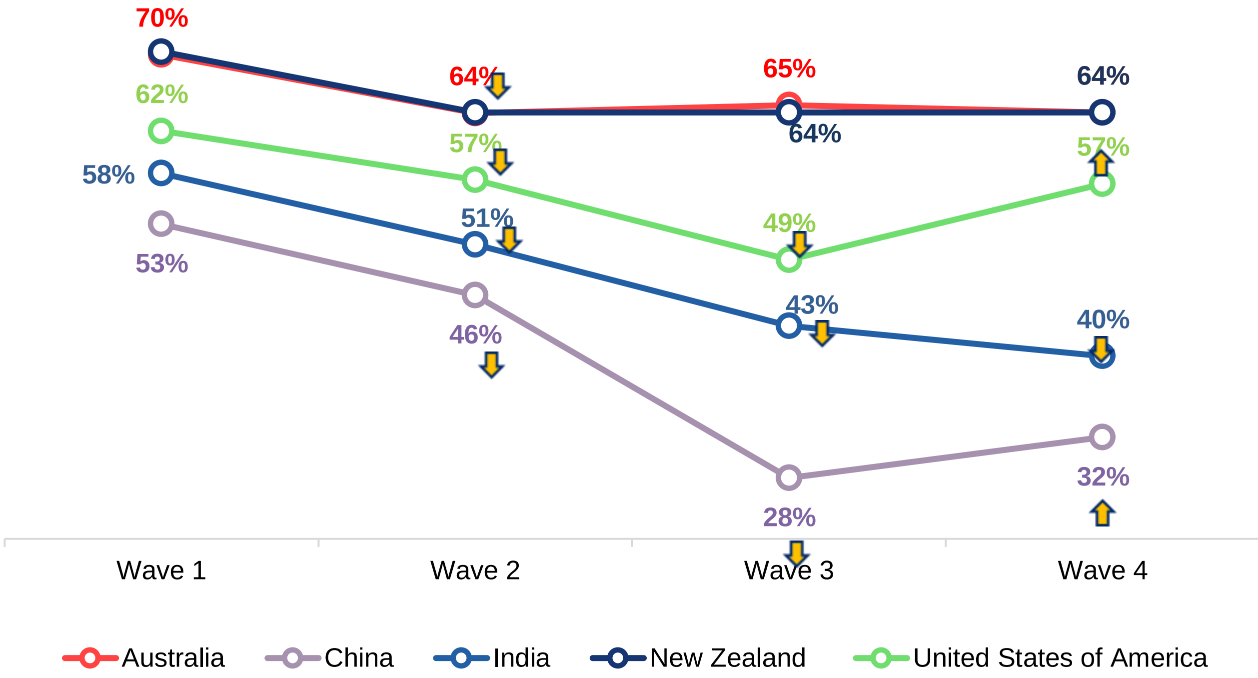
When it comes to China, support for an FTA has gone up to a third (32%, +4 percentage points). Unlike in wave 3, support for an FTA with China is higher than opposition, albeit marginally (2 percentage point difference).

Analysis shows that this increase in support for an FTA with China is fairly universal across most demographic sub-groups. The largest increases in support can be observed among respondents in the North East (+15 percentage points) and those with the lowest household incomes (less than £10,000 per year, +11 percentage points).

Nonetheless, the following groups are significantly less likely to support the UK establishing an FTA with China: those with no qualifications (23%), those in SEG classifications DE (27%), women (27%), those aged 55 to 64 (28%), those in the North West (28%) and responents in the most disadvantaged IMD quartile (29%).

Support for an FTA with India varies amongst different demographics. It is lower among women (34%), those aged 16 to 34 (33%), in the North West (34%), respondents with no qualifications (27%) and those in SEG classifications DE (32%). Conversely, the following groups are more likely than average to support an FTA with India: those educated to degree level or above (49%), those in SEG classifications AB (49%) and C1C2 (42%), men (47%), those in the least deprived IMD quartiles (1st quartile 47% and 2nd quartile 46%), those aged 65 to 74 (47%) and 70+ (50%), and those in the South East (46%) and South West (45%).

Figure 22: Changes in support for establishing free trade agreements with a selection of countries



TP2. To what extent would you support or oppose the UK establishing a free trade agreement with each of the following countries?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave = 4009).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

6.1.3 Levels of support for a trade agreement with the USA have significantly increased while opposition has declined, returning to wave 2 levels.

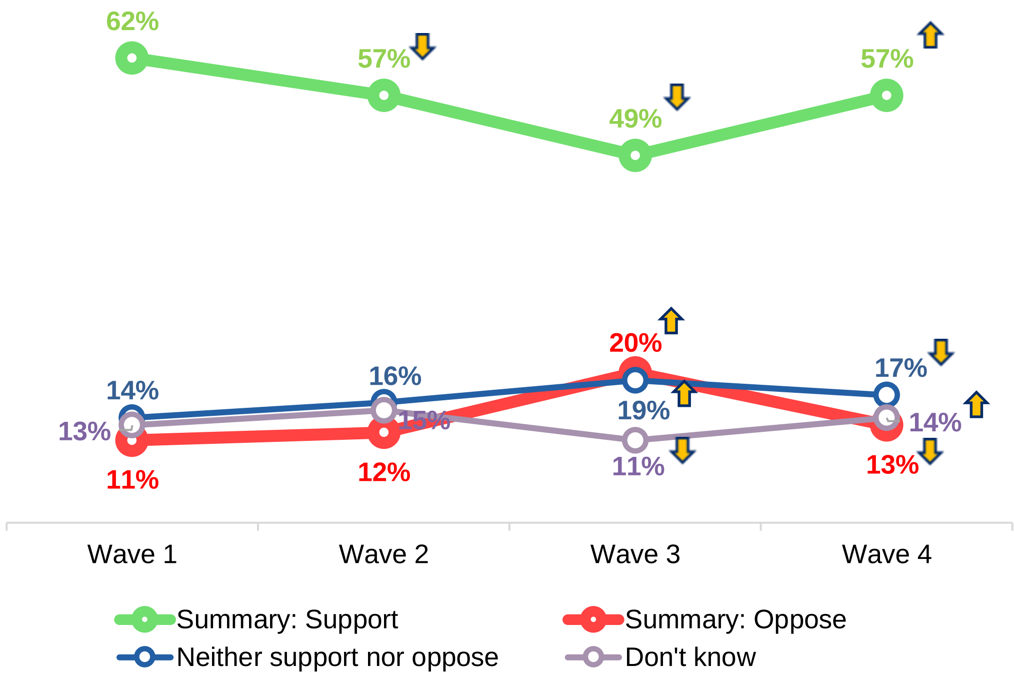
As figure 23 shows, support for establishing a free trade agreement with the USA has increased for the first time[38]. Following a drop to 49% at wave 3, support is now at around 3/5 (57%). Overall levels of support are now in line with wave 2 results. However, the strength of support is still lower than seen at wave 2: 32% strongly supported an agreement with the USA at wave 2, compared to 28% at wave 4.

Looking at results by demographics, the largest increases in support can be observed among: those in the North East (+16 percentage points), and those aged 55+ (+12 percentage points).

A similar pattern can be observed by gender. Support for a free trade agreement with the USA has significantly increased for both men and women, but the increase has been larger for women. In wave 3, 42% of women supported a deal, which has gone up to 51% in wave 4. By comparison, support from men has increased from 58% to 63%. Increases in support have been more consistent across other demographics such as SEG or educational attainment.

[38] Joe Biden was elected President of the USA in January 2021, ahead of the wave 4 fieldwork period.

Figure 23: Support and opposition to the UK establishing free trade agreements with USA



TP2. To what extent would you support or oppose the UK establishing a free trade agreement with each of the following countries?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

6.1.4 There are particularly high levels of support for enhancing the existing trade deal with Canada.

For the first time at wave 4, respondents were asked about their views on existing free trade agreements. They were asked the extent to which they would support or oppose enhancing FTAs with Canada, Mexico, Vietnam and Singapore.

As Table 9 shows, 2/3 (66%) support enhancing the existing FTA with Canada while just 4% are opposed to this. Around half are also supportive when asked about Singapore (49%) and around 2 in 5 show support when asked about Mexico (41%) and Vietnam (38%).

Table 8: Support for enhancing free trade agreements

	Canada	Mexico	Vietnam	Singapore
Strongly support	36%	13%	13%	22%
Somewhat support	29%	28%	25%	27%
Neither	16%	32%	32%	25%
Somewhat oppose	3%	6%	8%	6%
Strongly oppose	1%	3%	3%	2%
Don't know	15%	18%	19%	17%
Summary: support	**66%**	**41%**	**38%**	**49%**
Summary: oppose	**4%**	**9%**	**11%**	**9%**
NET score	**+62%**	**+32%**	**+27%**	**+40%**

TP2i. The UK has trade agreements with some countries already. To what extent would you support or oppose the UK enhancing existing free trade agreements with the following countries? All respondents (Wave 4 = 4009)

6.2 Trade agreement priorities

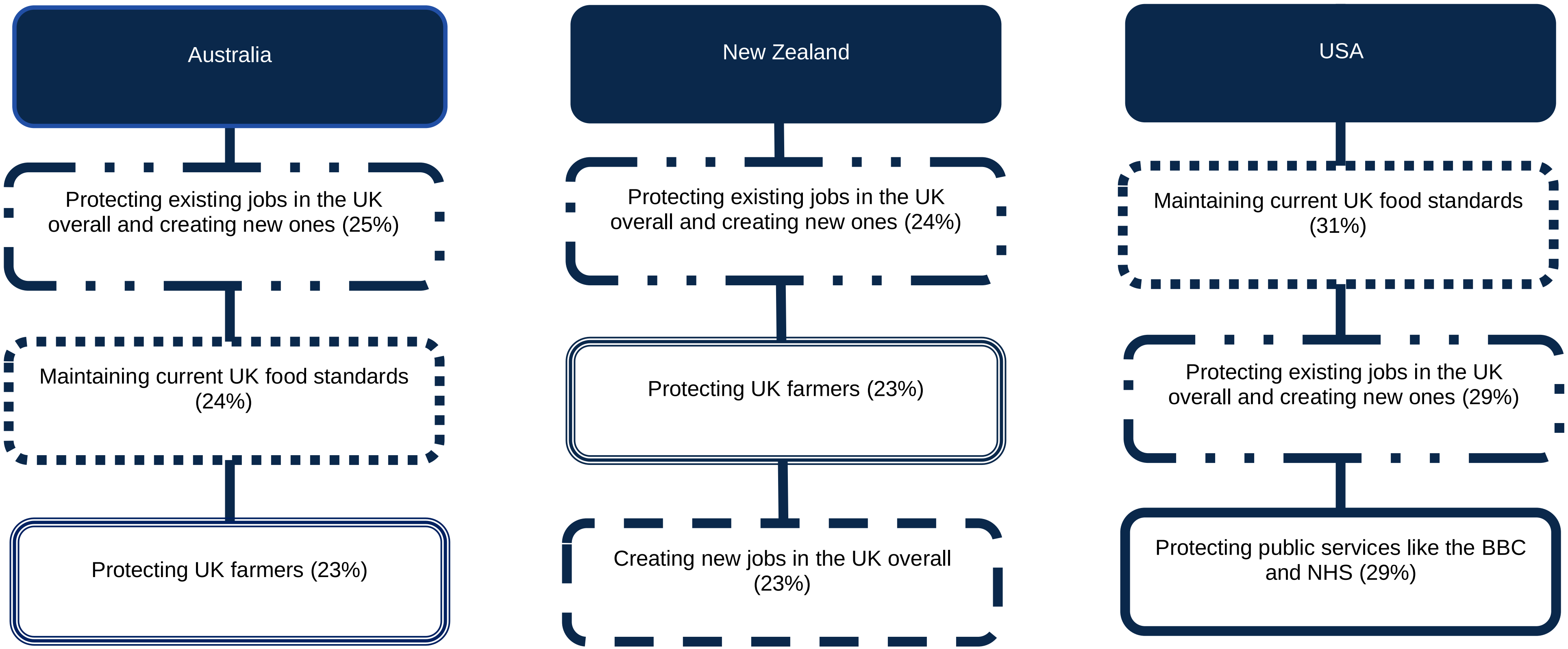
6.2.1 Protecting existing jobs has become one the highest priorities, regardless of the country negotiating free trade agreements with the UK.

For a third wave in succession, respondents were asked to think about what considerations the UK Government should give priority to when negotiating free trade agreements with Australia, New Zealand, and the USA. For each of the countries, respondents could select up to 3 considerations they saw as highest priority from a prompted list. The top 3 most frequently selected considerations for each country are presented in Figure 24.

Protecting existing jobs in the UK and creating new ones was selected as important irrespective of the country in question.

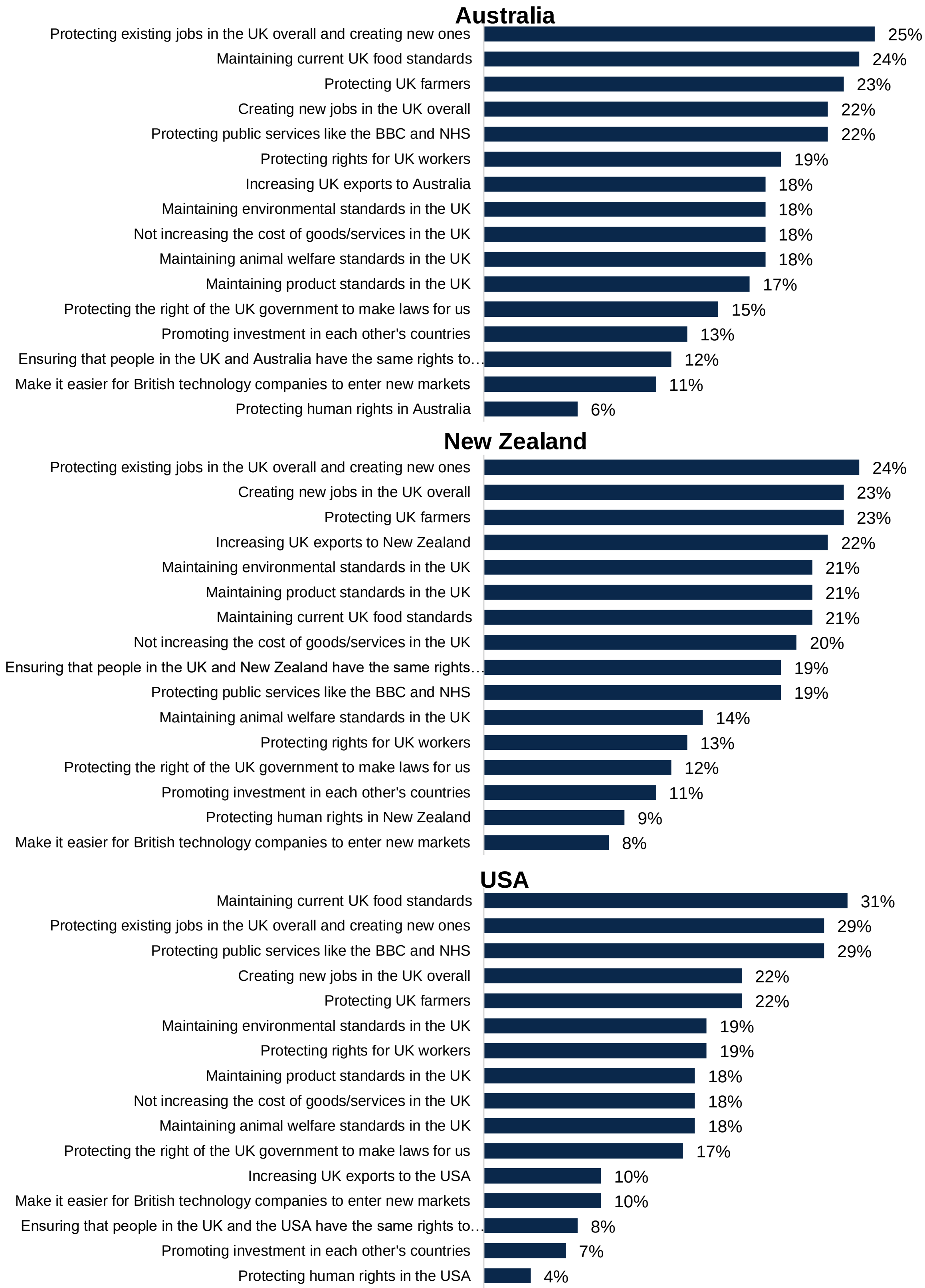
There are also some differences between priorities for countries, in particular the USA (see Figure 25). As with previous waves, protecting public services like the BBC and NHS was one of the 3 most important considerations for the USA, 29% choosing this option in wave 4. This consideration does not appear in the top 3 for any of the other countries, with around 1 in 5 selecting it for Australia (22%) and New Zealand (19%).

Figure 24: Top 3 priorities when negotiating free trade agreements



TP2c. Please select up to 3 considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with the following countries?
Multiple response question. Respondents could select up to 3 options.
Unweighted base sizes: all respondents (4009)

Figure 25: Considerations to be given the highest priority when negotiating free trade agreements



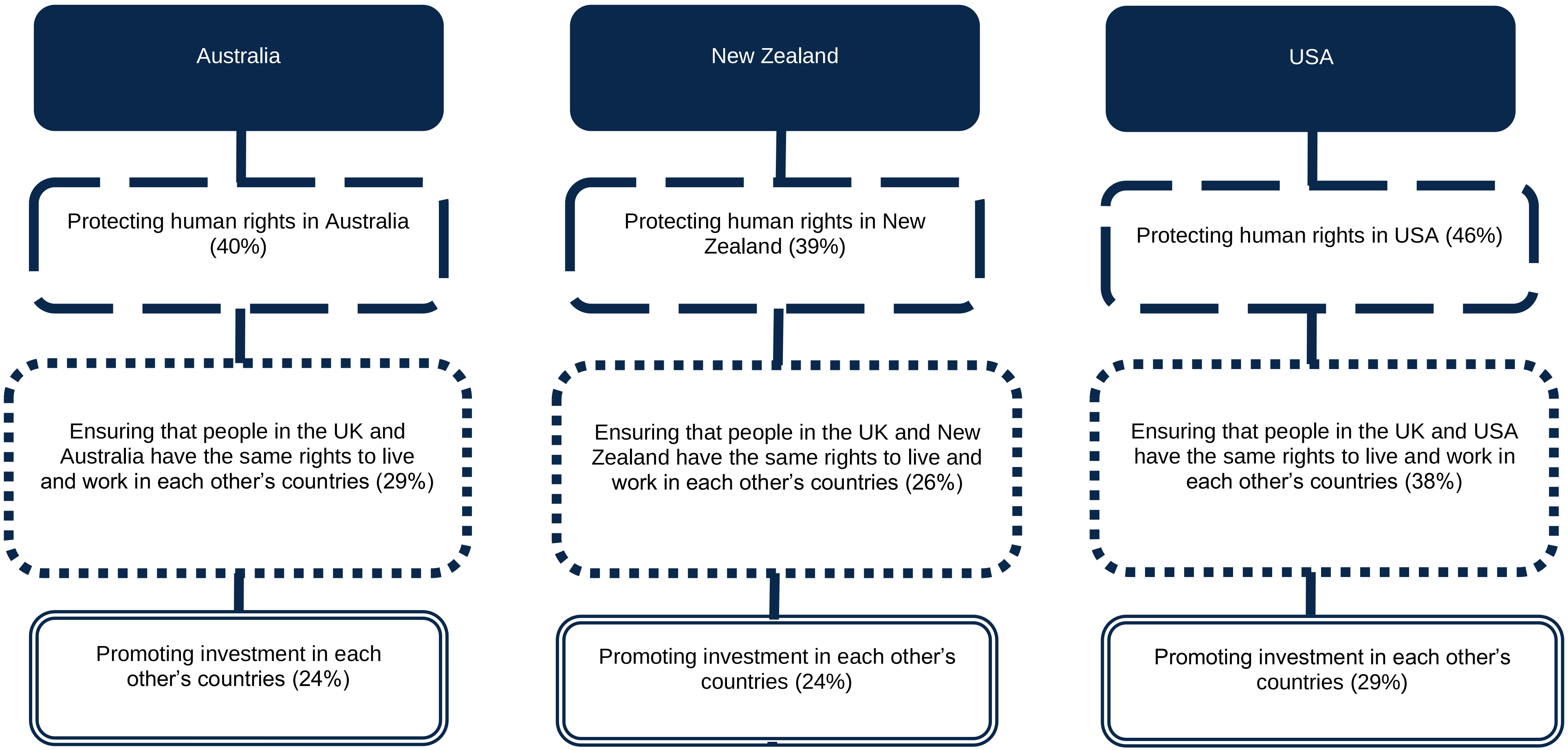
TP2c. Please select up to 3 considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with the following countries?
Multiple response question. Respondents could select up to 3 top options.
Unweighted base sizes: all respondents (4009)

6.2.2 There continue to be high levels of consistency across the 3 countries as to which considerations the public feel should have least priority in negotiations. These were promoting investment, equal rights to live and work in each country, and protecting human rights in the trade partner country.

Respondents were also asked which 3 considerations they think the Government should give the lowest priority to when negotiating free trade agreements (see Figure 27). Again, respondents were asked to select from the same list of options, excluding those they had given the highest priority to.

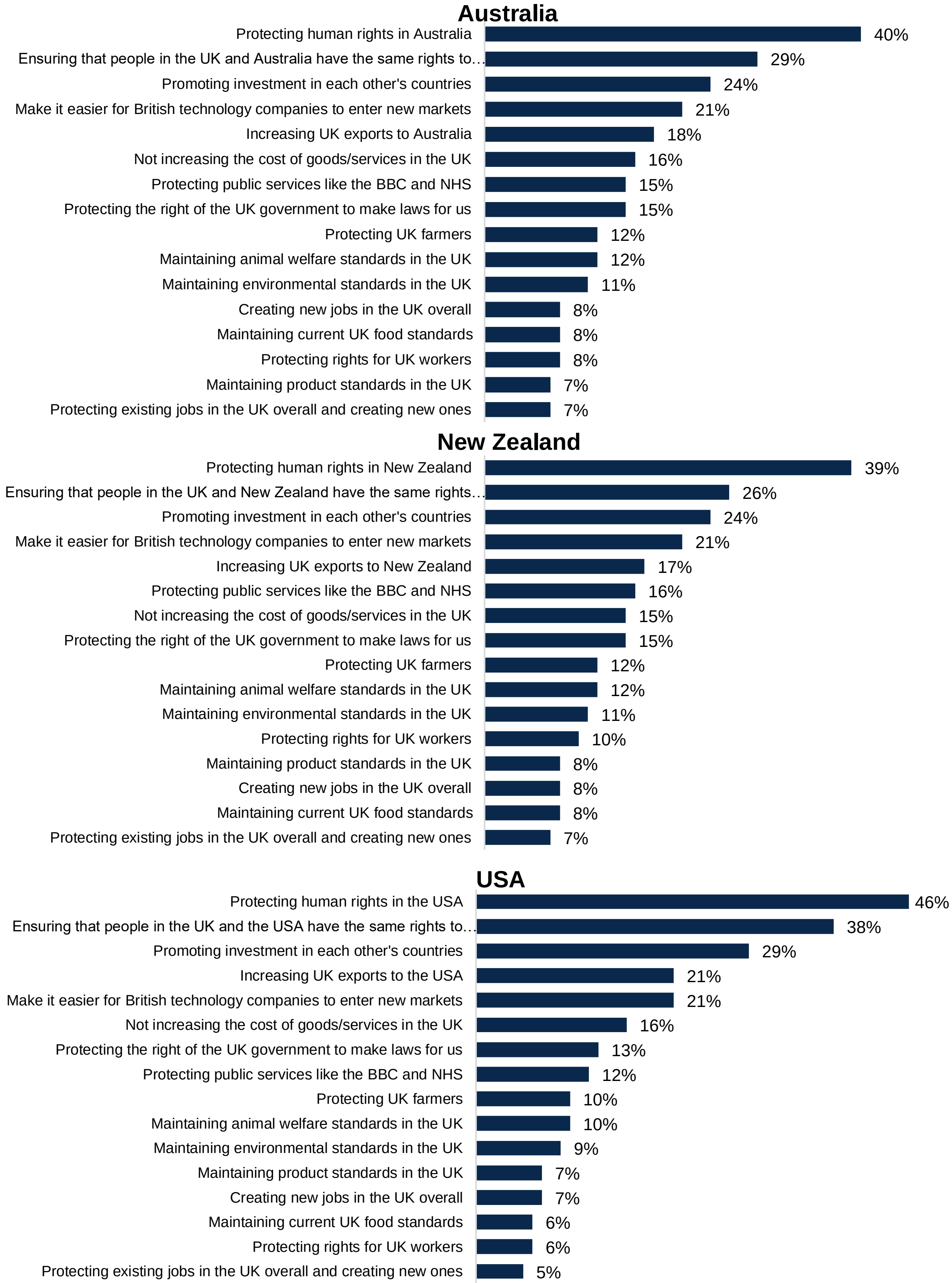
As can be seen in Figure 26, for each of the listed countries 3 considerations were consistently selected by the majority of respondents as the lowest priorities. These were promoting investment in each other's countries, ensuring that people in both countries have the same rights to live and work in each other's countries, and protecting human rights in the other country. Protecting human rights in the trade partner country was considered the lowest priority by the largest proportion of respondents in Australia, New Zealand and USA.

Figure 26: Considerations to be given the lowest priority when negotiating free trade agreements



TP2d. 'Please select up to 3 considerations you think the UK government should be giving the least priority to when negotiating free trade agreements with the following countries?
Multiple response question. Respondents could select up to 3 options.
Unweighted base size: all respondents (4,009)

Figure 27: Considerations to be given the lowest priority when negotiating free trade agreements



TP2d. Please select up to 3 considerations you think the UK government should be giving the lowest priority to when negotiating free trade agreements with the following countries?
Multiple response question. Respondents could select up to 3 bottom options.
Unweighted base size: all respondents (4009)

6.2.3 Protecting human and workers' rights are important considerations in regarding another country as an appealing trading partner.

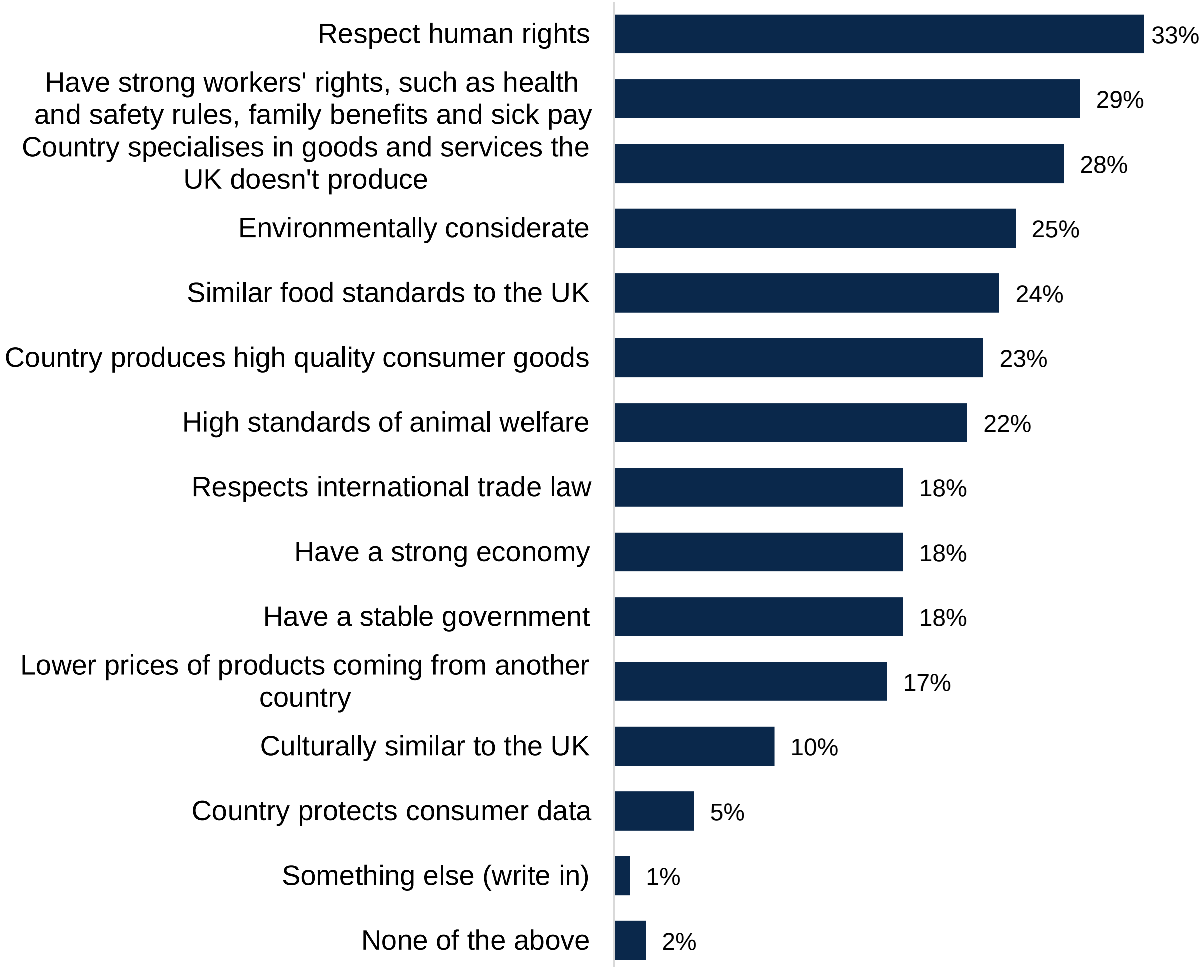
As well as considerations that the UK Government should be prioritising when negotiating free trade arrangements with specific countries, respondents were asked what considerations make another country an appealing trade partner.

Figure 28 shows the top considerations that would make another country an appealing trading partner. These are respecting human rights (33%), having strong workers' rights (29%) and the country specialising in goods and services that the UK doesn't produce (28%). This is followed by being environmentally considerate (25%).

Protecting human rights is the lowest priority when negotiating free trade agreements with Australia, New Zealand and the USA (see Figure 27). This suggests that even though this issue is not seen as a concern in these specific countries, it is still an important consideration when thinking about trade agreements in general.

It is also the case that people are more likely to want the UK to choose trading partners who have respect for human rights. However, when it comes to actually negotiating deals with specific counties, they are more likely to view other considerations such as protecting and creating jobs as more important. In other words, human rights are an important consideration at the initial stage when selecting partners to negotiate with, but once negotiations have then started, other factors are often viewed as more important.

Figure 28: Considerations that would make another country an appealing trading partner – top considerations



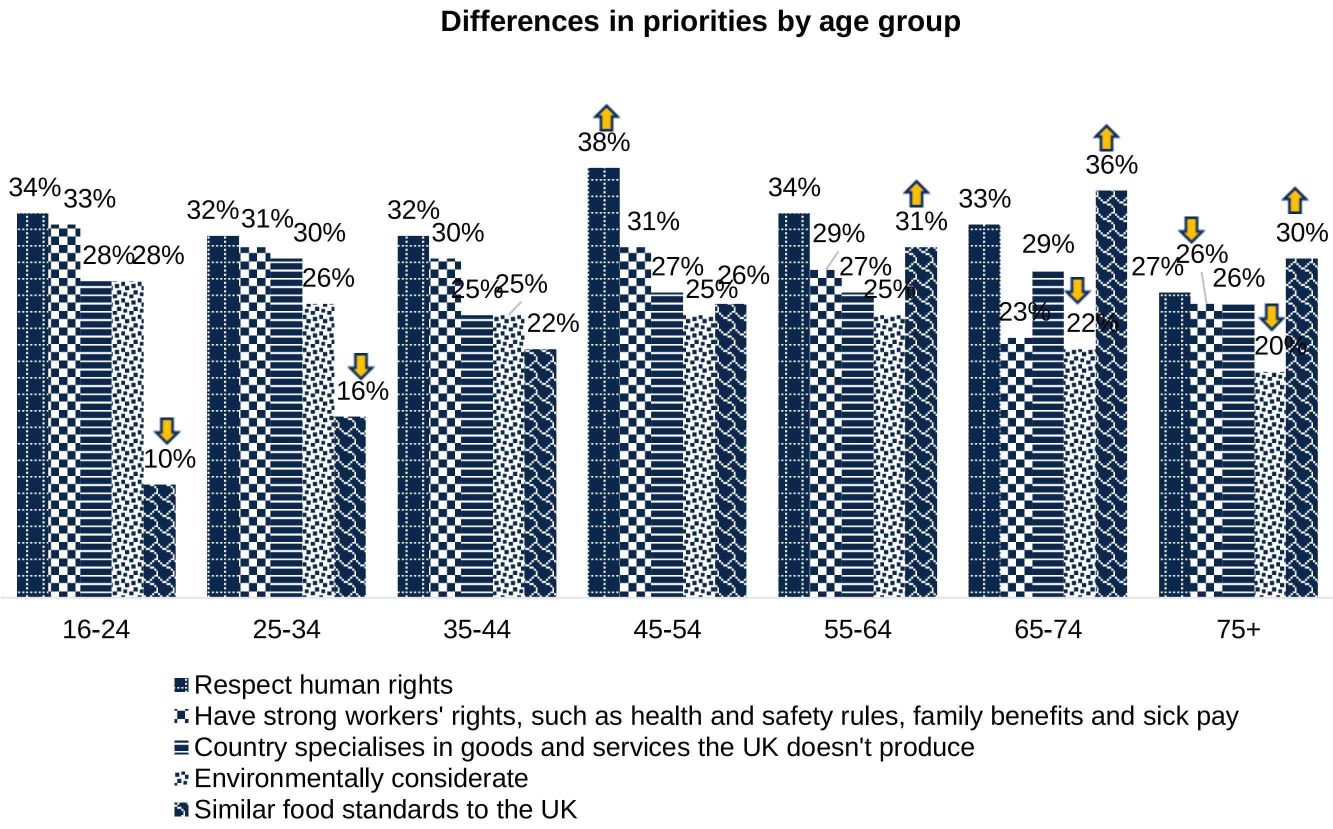
TP2e. Which of these considerations would make another country an appealing trading partner to you?
Multiple response question. Respondents could select up to 3 top options.
Unweighted base sizes: all respondents (4009)

Figure 29 shows the differences between respondents of different age groups in regard to what considerations they think would make another country an appealing trading partner.

Younger respondents are generally more likely to prioritise considerations around people’s rights. Important considerations for this group included the trade partner respecting human rights and having strong workers’ rights. On the other hand, older respondents are more likely to prefer trade partners that have similar food standards to the UK.

Other differences can also be observed by gender, ethnicity, and socio-economic classification. Women are more likely than men to find strong workers’ rights appealing (33% versus 25%). This is also the case of BAME respondents (34% versus 29% of White respondents). Those in SEG classifications AB are more likely than those classed as DE to find respecting human rights and being environmentally considerate appealing.

Figure 29: Considerations that would make another country an appealing trading partner – differences by age



TP2e. Which of these considerations would make another country an appealing trading partner to you? Top Considerations. Multiple response question. Respondents could select up to 3 options.
Unweighted base size: all respondents (4009), 16 to 24 (405), 25 to 34 (596), 35 to 44 (612), 45 to 54 (675), 55 to 64 (696), 65 to 74 (634), 75+ (350)
Statistical significance arrows represent significant differences when compared to the total.

6.2.4 Cultural similarity stands out as being one of the lowest considerations for making another country an appealing trade partner.

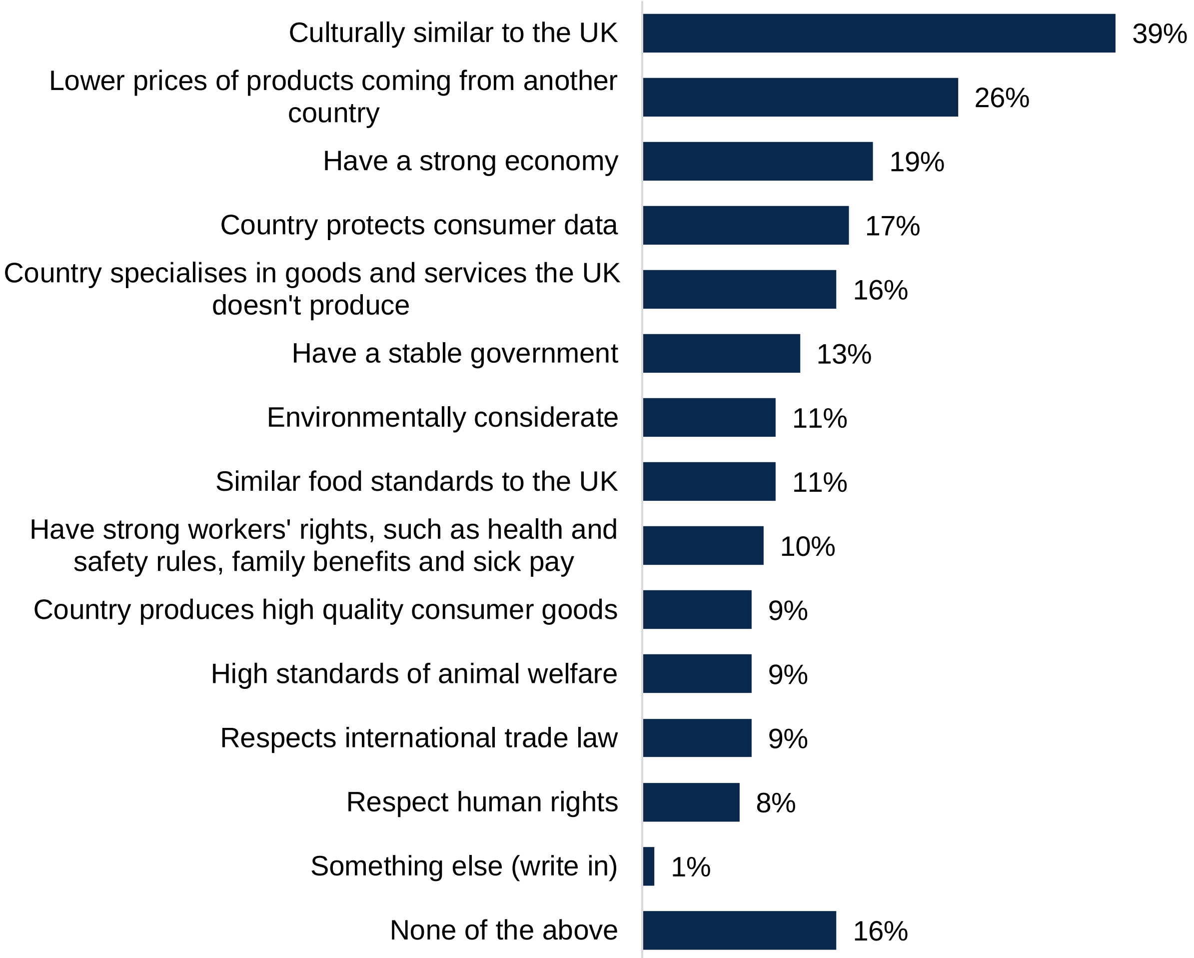
The least important characteristics that would make another country an appealing trading partner were also explored (see Figure 30).

Being culturally similar was most commonly cited as the least important consideration, with around 2 in 5 (39%) saying that this is among the least important considerations. In wave 3, however, when this question was asked by country, this consideration was most frequently selected as an important consideration for Australia and was the second most frequently selected important consideration for New Zealand and the USA.

Lower prices of products from another country (26%) and trade partners having a strong economy (19%) were also thought to be of less importance. In contrast, in wave 3, lower prices were selected as the third highest consideration for the USA, and having a strong economy was among the top considerations for respondents when asked about the USA, Japan and Australia.

Changes to question wording explain these differences. In the previous iteration, respondents were asked about specific countries. This changed at wave 4, with respondents asked to consider priorities more generally. At a general level, people may convey certain priorities they think are important, but it may also be the case that slightly different criteria make a particular country an appealing partner.

Figure 30: Considerations that would make another country an appealing trading partner – bottom considerations



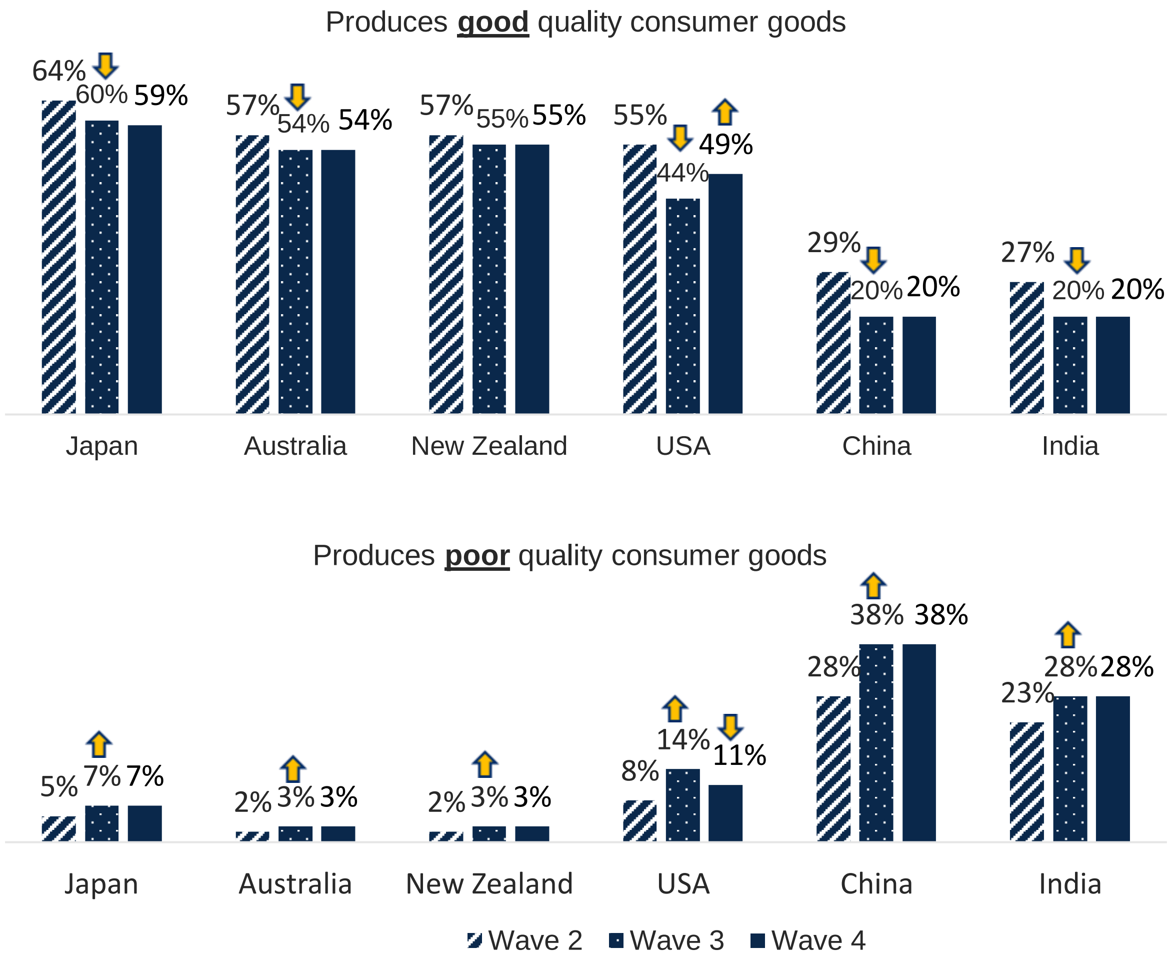
TP2e. Which of these considerations would make another country an appealing trading partner to you?
Multiple response question. Respondents could select up to 3 bottom options.
Unweighted base size: all respondents (4009)

6.2.5 Although there have been declines in perceptions of quality, Japan continues to be seen as the country producing the highest quality consumer goods.

Figure 31 presents respondents' perceptions of the quality of consumer goods across 6 countries. In line with previous waves, more respondents say Japan produces good quality consumer goods than any other (59%, in line with wave 3). Meanwhile, India and China continue to be more associated with producing poor quality consumer goods (28% and 38% respectively)

Compared to wave 3, there has been an increase in the proportion of respondents who say that the USA produces consumer goods of good quality (up to 49%, +5 percentage points). This has been accompanied by a reduction in the proportion who say that the USA produces poor quality consumer goods (from 14% in wave 3 to 11% in wave 4).

Figure 31: Perceptions as to the quality of consumer goods by country



CG. Which of the following best describes your view of the quality of consumer goods from the following countries?
Unweighted base sizes: all respondents (Wave 2 = 2349, Wave 3 =3224, Wave 4 = 4009).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

7 Appendix

7.1 SEG classification definitions

SEG Classification	Description
A	**Higher managerial / professional/ administrative** (For example, Established doctor, Solicitor, Board Director in a large organisation (200+ employees, top level civil servant/public service employee).
B	**Intermediate managerial / professional/ administrative** (For example, Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large organisation, principle officer in civil service/local government
C1	**Supervisory or clerical/ junior managerial / professional / administrative** (For example, Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
C2	**Skilled manual worker** (For example, Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, AA patrolman, pub/bar worker, etc.)
D	**Semi or unskilled manual work** (For example, Manual workers, all apprentices to be skilled trades, caretaker, Park keeper, non-HGV driver, shop assistant)
C	**Full time Student**
E	**Casual worker – not in permanent employment**
E	**Housewife/ Homemaker**
E	**Retired and living on state pension (That is, no private or work-related pension scheme)**
E	**Unemployed or not working due to long-term sickness**
E	**Full-time carer of another household member**
E	**Other**

7.2 Regression analysis

Regression analysis: Regression analysis is a set of statistical processes for estimating the relationships between a dependent variable and a set of independent variables. Using regression analysis we can identify whether a particular independent variable is a statistically significant driver of the dependent variable whilst controlling for a variety of other factors. Doing so can give us more confidence in the strength of the relationships between variables.

7.3 Statistical outputs

7.3.1 Regression on factors driving support for the UK establishing free trade agreements with countries outside of the EU

Variable	Relative Importance
Econ: Do you think the general economic conditions of the country will improve, stay the same or get worse over the next 12 months?	25%
IK1: How interested would you say you are in how the UK trades with countries outside the European Union	21%
Protectionist Group	12%
Age	11%
IMD Quartile	4%
Income (Scale £)	4%
SEG: Socio-Economic Grade	4%

8 Statement of terms

8.1 Compliance with International Standards

BMG complies with the International Standard for Quality Management Systems requirements (ISO 9001:2015) and the International Standard for Market, opinion and social research service requirements (ISO 20252:2012) and The International Standard for Information Security Management (ISO 27001:2013).

8.2 Interpretation and publication of results

The interpretation of the results as reported in this document pertain to the research problem and are supported by the empirical findings of this research project and, where applicable, by other data. These interpretations and recommendations are based on empirical findings and are distinguishable from personal views and opinions.

BMG is not publishing any part of these results without the written and informed consent of the client.

8.3 Ethical practice

BMG promotes ethical practice in research: We conduct our work responsibly and in light of the legal and moral codes of society.

We have a responsibility to maintain high scientific standards in the methods employed in the collection and dissemination of data, in the impartial assessment and dissemination of findings and in the maintenance of standards commensurate with professional integrity.

We recognise we have a duty of care to all those undertaking and participating in research and strive to protect subjects from undue harm arising as a consequence of their participation in research. This requires that subjects’ participation should be as fully informed as possible and no group should be disadvantaged by routinely being excluded from consideration. All adequate steps shall be taken by both agency and client to ensure that the identity of each respondent participating in the research is protected.

The UK's Department for International Trade (DIT) has overall responsibility for promoting UK trade across the world and attracting foreign investment to our economy. We are a specialised government body with responsibility for negotiating trade policy, supporting businesses, as well as delivering an outward-looking trade diplomacy strategy.

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