Department for
Business & Trade

Public Attitudes to Trade Tracker
Wave 6 report (data collection July to September 2022)

Prepared for the Department for Business and Trade

Prepared by BMG Research

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1   Executive summary

1.1   Background and Methodology

This report presents the findings from the sixth wave of a nationally representative survey of attitudes towards trade and public priorities towards trade policy.

Waves 1-6 of the Public Attitudes to Trade Tracker were run by the Department for International Trade (DIT). DIT was incorporated into The Department for Business and Trade on 21 February 2023, following a machinery of government change announced on 7 February 2023.

Fieldwork for wave 6 took place between 23 July and 25 September 2022, and so the results should be viewed within this context. Over this period national and world events helped to drive inflation, impacting the UK economy. This is likely to have played a part in informing responses at this wave.

Waves 1 and 2 of the DBT 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, 4 and 5 were 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 methodology has been used for every wave from wave 3 onward. 63% of the final sample at wave 6 was push to web and 37% was achieved via an online panel. 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 the 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.

This executive summary sets out key findings for wave 6 as well as an outline of changes compared to the previous wave.

1.2   Overview of key findings

While public optimism about the health of the economy has dropped considerably, levels of support for signing free trade agreements has remained stable. Support for free trade agreements with specific named countries has increased in several cases, including India.

Economic optimism has been much higher in previous waves. In previous waves, those who were pessimistic about the economy had lower support for free trade agreements. Accordingly, as economic optimism declines, we may expect a decline in support for free trade agreements as a result.

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[1] Please note that in each wave a small number of telephone interviews were also conducted due to accessibility issues. This accounts for 7 interviews at wave 6.

However, in wave 6 this hypothesis did not prove true. Economic optimism declined, but support for free trade agreements remained stable overall, and support among those pessimistic about the economy increased. The economic mood has not damaged the wider case for free trade agreements in a way that one might have expected based on previous data. Instead, the public may see trade as one way of improving the economy and tackling the cost-of-living crisis.

1.2.1 The economic climate

Almost twice as many respondents as in Wave 5 felt the economic conditions of the country will get worse over the next 12 months. 60% felt this way in wave 6, compared to 35% in wave 5. This is also more than twice the proportion at wave 4 who felt this way (27%).

Just 14% expected the economy to improve, a 12 percentage point decrease on the 26% who did so at wave 5. This is also a 23 percentage point decrease on the 37% who did so at wave 4. One in five (20%) felt it would stay the same, a 7 percentage point decrease on wave 5. Levels of uncertainty in this respect have also reduced, from 12% giving a 'don't know' answer at wave 5 to 7% at the latest wave.

While peoples feelings about the economy remains a predictor of their feelings about free trade, the relationship is different than shown in previous years data. The large decline in economic optimism has not led to an accompanying decline in support for the UK establishing FTAs with countries outside the European Union. Support for FTAs among those who felt the economy will worsen has increased from 56% at wave 5 to 65% at wave 6. Opposition among this group has declined from 11% to 5%. In other words, despite becoming more negative in their outlook for the UK economy, many respondents still say they support FTAs.

This was also coupled with a belief that increased free trade is more likely to decrease (40%) than to increase (25%) the cost of living.

The Wave 6 findings should therefore be considered in this context.

Overall levels of interest in the UK economy have returned to the levels seen at wave 3, following a 5 percentage point increase to 86%. This follows declines over the previous two waves.

Levels of interest in UK foreign affairs also increased by 3 percentage points to 68%, remaining lower than the levels seen at wave 3 (71%). Again, this follows declines over the previous two waves.

Self-reported knowledge about the UK economy increased by 3 percentage points to 63%. Self-reported knowledge about the UK's approach to environmental issues has declined from 58% to 55%.

1.2.2 Views about FTAs in general

Interest, knowledge and awareness

70% of respondents said they were interested in how the UK trades with countries **inside** the European Union. 68% said they were interested in how the UK trades with countries **outside** the European Union. This included respondents who said they were 'very interested' in how the UK trades with countries inside (23%) and outside the EU (21%).

Interest in how the UK trades with countries in the EU has increased by 2 percentage points since wave 5. Interest in how the UK trades with countries outside the EU is unchanged.

Self-reported knowledge about how the UK trades with EU and non-EU countries remains consistent with wave 5, at 38% and 35% respectively. This can be compared to 40% and 36% in Wave 5.

In each instance, levels of self-reported knowledge were lower than levels of interest (those being 70% and 68% respectively).

The UK and Australia agreement was the trade-related story with the greatest cut-through at wave 6, at 37%. Despite this, awareness was lower than at wave 5 (46%). This was followed by the UK beginning negotiations for a new trade deal with India (29%).

The UK-Switzerland consultation (8%), the beginning of GCC negotiations (11%) and the signing of an agreement with the state of Indiana (11%) had lower awareness. In general, trade stories were lesser known than stories about other events of the day such as the Queen's Platinum Jubilee and the Commonwealth Games.

Support for FTAs with other countries

At 67%, the proportion who said they were supportive of the UK establishing free trade agreements with countries outside of the EU remained stable. This was following a decline at wave 5 (65%). Apart from a peak at wave 4 (70%), this was in line with all other waves. It should be noted that this is lower than the levels of support shown for FTAs with specific countries, discussed in more details below. However, opposition to establishing free trade agreements with other countries remains very low, with just 4% of respondents opposed.

Reasons for supporting FTAs focused on:

- strengthening the UK economy (58%),

- improving trade opportunities (41%),

- the UK being able to set its own trade policy (36%),

- lowering prices for consumers (36%),

- and improving ties with other countries (35%)

Reasons for opposing FTAs focused:

- on a reduction in safety and food standards (41%),

- negative impacts on the environment (37%),

- detrimental effects on key industries (35%)

- and lack of trust/confidence in the government (34%).

1.2.3 Views about country-specific FTAs

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

Awareness of the CPTPP has remained stable at 28%. Among those who say they has good knowledge of the CPTPP support for it has remained stable since Wave 5 (59% compared to 57%). This is below the peak of 63% in Wave 4.

The Gulf Cooperation Council (GCC)

The majority (56%) had never heard of the GCC, but this is lower than the 63% who had never heard of it at wave 5. The uplift in awareness was among those who had heard the name but knew nothing about it, from 15% to 20%. It did not come from those who had some knowledge about it (24% compared to 22% at wave 5).

36% of respondents said they would support the UK establishing a free trade agreement with the GCC. One in five (22%) opposed this, while 25% offered a neutral opinion, and 17% did not know. This suggests that the public may have warmed towards a trade agreement with the GCC. These levels of support are higher than at wave 5 with regard to the UK entering into formal trade talks with the GCC (28%).

MERCOSUR

68% of respondents had never heard of MERCOSUR, while 20% said they knew at least a little about MERCOSUR.

37% of respondents said they would support the UK establishing a free trade agreement with MERCOSUR. 13% said they would oppose it. 30% had no strong opinion either way, and 20% did not know.

Support for FTAs with specific countries

Respondents were presented with 9 countries and asked to what extent they would support or oppose the UK establishing a free trade agreement with them.

For the first time at wave 6 the countries asked about included Switzerland, Indonesia, South Korea and Turkey. Data is also included for countries that have been tracked over multiple previous waves (the USA, China, India, UAE and Saudi Arabia),.

Support for securing a free trade agreement with Switzerland drew the highest levels of support (64%), followed by the USA (63%). Levels of support for FTAs with these two countries almost matched that for FTAs with other countries generally (67%). Around half supported the establishment of a free trade agreement with Indonesia (47%), India (50%) and South Korea (49%).

Support for free trade agreements with Turkey and the UAE was lower, with around two in five supporting each (40% and 38% respectively).

Views on the establishment of free trade agreements with Saudi Arabia and China were more balanced. Approximately the same proportion supported (32% in both instances) as opposed (30% and 34% respectively) these agreements.

Support for free trade agreements with all of the countries included in multiple waves has increased:

- India, by 10 percentage points to 50%

- UAE, by 9 percentage points to 38%

- USA, by 6 percentage points to 63%,

- Saudi Arabia, by 6 percentage points to 32%

- China, by 2 percentage points to 32%

Trade agreement priorities

Respondents were asked to think about what considerations the UK Government should give priority to when negotiating free trade agreements. They were asked to consider this in general, , and specifically with the USA, Israel, Turkey, South Korea and Switzerland.

The top three most frequently selected considerations generally were.:

- protecting existing jobs in the UK and creating new ones (45%),

- protecting key industries in the UK such as agriculture, manufacturing and the NHS (46%),

- and maintaining current UK food standards (42%)

These were also the three most frequently selected for the individual countries, albeit in varying order.

All respondents were also asked what considerations they thought the UK government should be given the least priority to when negotiating free trade agreements:

- 51% mentioned building the cultural influence of the UK,

- 36% mentioned sharing knowledge and innovations,

- a quarter mentioned growing trade with lower-income nations,

- supporting jobs across the globe (27%),

- reducing the likelihood of conflict (26%),

- and protecting human rights and equality in other countries (24%).

Support for enhancing existing free trade agreements

Awareness of the CPTPP has remained stable at 28%. Among those who say they have good knowledge of the CPTPP ,support has remained stable since Wave 5 (59% compared to 57%). This is below the peak of 63% in Wave 4. Support for joining the CPTPP amongst the public overall was at its highest level at 53%.

Respondents were shown a number of non-EU countries with which the UK already has trade agreements in place. They were asked the extent to which they would support or oppose enhancing the existing FTAs with these countries. Along with Canada, Singapore and Mexico, for the first time at wave 6 this included Israel.

Support for enhancing the existing trade deal with Canada was high, with 71% respondents in support and just 5% saying that they were opposed. This exceeds the level of support for FTAs with other countries generally (67% supported).

57% were supportive when asked about Singapore, half (52%) when asked about Mexico, and 2 in 5 (42%) when asked about Israel. At 18%, levels of opposition were highest for Israel (17% compared to less than 10% in relation to the other countries).

For those countries included in previous waves, support has increased to the highest levels:

- Canada, by 8 percentage points to 71%

- Singapore, by 11 percentage points to 57%

- Mexico, by 13 percentage points to 52%

1.2.4 The impact of trade on people and communities

The impact of trade on the UK overall and on daily life

69% felt that signing free trade agreements with countries outside the EU would have a positive impact on the UK overall. This is a significant uplift on wave 5 (64%). This returns this measure to the levels seen at wave 4 (68%), which until now had been the peak.

There has also been an increase since wave 5 in the proportion who felt that the effect would be positive on their daily lives. This rose from 56% to 62%, which also represents a peak on this measure. There continues to be a gap between the proportion of respondents who stated free trade agreements will have a positive impact on the UK overall (69%), and those who stated they will have a positive impact on their daily lives (62%).

The impact of trade on job opportunities and wages

60% felt that increased free trade would have a positive impact on job opportunities for the UK as a whole. 44% that it would have a positive impact on job opportunities in their local area. In both instances, 1 in 10 felt it would have a negative impact (11% and 10% respectively).

31% felt it would result in higher wages nationally, and a 25% felt it would do so at a local level. While this was in line with Wave 5, and higher than Waves 2 to 4, positive perceptions remain lower than was the case at wave 1. Data at wave 2 represents the peak in these views (33% and 28% respectively). Perceptions that increased free trade would result in lower wages in the UK and their local area have remained stable, at 15% and 14% respectively.

The impact of trade on the price and quality of goods and services

45% felt that trade would decrease the price of goods and services. This was the highest level since the study began and a 6 percentage point increase since Wave 5. This was double the proportion who felt that prices would increase (23%).

It was found that, while 23% believed trade would increase the cost of living, 40% believed it would decrease the cost of living[2].

Views on the impact of trade on the quality of goods and services have remained stable. 32% felt it would lead to higher quality goods and services, and 22% lower quality.

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[2] This question was new at wave 6.

2 Background and methodology

2.1 Background, context and research objectives

The Department for International Trade (DIT), which was incorporated in February 2023 into the newly formed Department for Business and Trade (DBT) . DBT is the UK's department for economic growth. The department supports businesses to invest, grow and export, creating jobs and opportunities across the country.

DBT is responsible for:

- redrawing our rules to ensure businesses thrive, markets are competitive and consumers are protected
- securing investment from UK and international businesses
- advising, supporting, and promoting British businesses to grow and export
- opening up new markets for businesses by removing barriers and striking trade deals
- promoting free trade, economic security and resilient supply chains

DBT view the UK public as an important group of stakeholders. 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 the PATT to examine public attitudes towards trade and to understand the public's priorities as they relate to trade policy. Waves 2, 3, 4 5 and now 6 of the PATT have enabled DBT to track shifts in sentiment over time.

Fieldwork for wave 6 was conducted between 23 July and 25 September 2022, although it was paused the day after the death of Queen Elizabeth II and the day of her funeral.

Timings for past waves are as follows:

- the first wave, which set the baseline for the study, concluded in January 2019

- wave 2 finished in August 2019,

- wave 3 was completed in August 2020,

- wave 4 finished in May 2021,

- and wave 5 ended in January 2022.

Final reports for waves 1, 2, 3, 4 and 5 have been published by DBT[3].

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[3] For wave 1, please see: Public attitudes to trade tracker (PATT): wave 1 - GOV.UK (www.gov.uk)
For wave 2, please see: Public attitudes to trade tracker (PATT): wave 2 - GOV.UK (www.gov.uk)
For wave 3, please see: Public attitudes to trade tracker (PATT): wave 3 - GOV.UK (www.gov.uk)
For wave 4, please see: Public attitudes to trade tracker (PATT): wave 4 - GOV.UK (www.gov.uk)
For wave 5, please see: Public attitudes to trade tracker (PATT): wave 5 - GOV.UK (www.gov.uk)

2.2 Overview of methodology

2.2.1 Overview of methodological changes at waves 3, 4 5 and 6[4]

Readers should treat comparisons of waves 3, 4, 5 and 6 with data from waves 1 and 2 with additional caution. Caution should always be exercised when tracking survey data. Extra caution should be taken in this instance due to the methodological changes that were introduced in wave 3, following the beginning of the Covid-19 pandemic.

Waves 1 and 2 of the 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. A new methodology introduced and replicated again at waves 4, 5 and 6.

As a result, the push-to-web sample size was increased (63% of the final sample at wave 6, 64% of the final sample at wave 5, 74% 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
5	1,907	N/A	1,082	2,989
6	1,938	N/A	1,120	3,058

2.2.2 Push-to-web and online panel overview

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, and 1,938 respondents completed the survey, representing a response rate of 16%.

This is in line with the push-to-web response rate at wave 5, but lower than the push-to-web response rates of 25% at wave 4 and 20% at wave 3.

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[4] For a more detailed overview of the methodology used at wave 5, please see the technical report available at: https://www.gov.uk/government/collections/public-attitudes-to-trade-tracker
[5] Please note that in each wave a small number of telephone interviews were also conducted due to accessibility issues. This accounted for 7 interviews at wave 6.

It should be noted, however, that compared to waves 3 and 4, at the time of waves 5 and 6 fieldwork, most Covid-19 restrictions had been lifted. Therefore, respondents were more likely to have been able to socialise and resume other activities thus having less free time to fill in the survey.

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.

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 1,120 of the target interviews via online panel interviews (37% 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[6].

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.

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[6] For more information, please see: Data Collection & Analytics - Savanta

2.2.3 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[7]

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

The weighted national totals for wave 6 were as follows: England n=2,569, Scotland n=258, Wales n=147, and Northern Ireland n=85.

All reporting is based on the combined response from push to web and panel, which have been then weighted to represent the UK population.

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[7] A new addition at wave 3 and continued at wave 4 and 5 and 6. 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

2.2.4 Changes to the questionnaire from previous Waves

Following considerable work developing the questionnaire in advance of previous waves, most of the questions in wave 6 remained identical. They follow a similar order and structure to minimise potential order effects[8]. This allows for most questions to be tracked across multiple waves, to see how responses have changed over time. However, several additions and changes were made at wave 6.

New questions

- reasons for supporting or opposing FTAs

- impacts of free trade on job opportunities

- perceived impact of free trade on the cost of living

- awareness of and support for MERCOSUR

- priority considerations for the UK government when negotiating FTAs with other countries

Removed questions

- reasons for believing that FTAs would have a positive or negative impact

- impacts of free trade on the number of jobs available

- views on the quality of consumer goods from a range of countries

- questions about the World Trade Organisation were removed

- the UK-Australia FTA

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. It reviewed the question wording and structure of new or substantially altered questions[9]. Upon review of themes emerging from the cognitive interviews, small textual changes were made before a final draft of the questionnaire was agreed.

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[8] 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
[9] 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

2.2.5 Fieldwork

Fieldwork was conducted between 23 July and 25 September 2022. There were several notable events taking place both before and during the fieldwork period. This includes the Russian invasion of Ukraine, the resignation of Boris Johnson as Prime Minister, inflation in the UK reaching 8.8%, Liz Truss' election as Prime Minister, the appointment of Kemi Badenoch as Secretary of State for DIT (now DBT), and the death of Her Majesty the Queen[10].

More details on technical and methodological elements of the study can be found in the accompanying technical report.

2.3   Contents and structure of the report

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

1. interest, knowledge and engagement

2. support for free trade agreements and their perceived impact

3. trade partner preferences

2.4   Presentation of results

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

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.

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[10] Fieldwork for wave 6 was conducted between 23 July and 25 September 2022, although it was paused the day after the death of Queen Elizabeth II and the day of her funeral

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[11].

It is important to note that the online panel interviews relied on quota sampling. There are some 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[12].

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[11] Data tables can be accessed here: https://www.gov.uk/government/collections/public-attitudes-to-trade-tracker
[12] 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

3   Interest, knowledge and engagement

3.1   Interest in trade

3.1.1 Interest in the UK economy increased, reaching its joint highest level since the tracker began. Interest in UK foreign affairs and how the UK trades with countries in the EU also increased. While interest in how the UK trades with non-EU countries remained stable.

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 European Union (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.

Following declines over the previous two waves, overall levels of interest in the UK economy have returned to the levels seen at wave 3, following a 5 percentage point increase to 86% (see figure 1).

Again following declines over the previous two waves, levels of interest in UK foreign affairs have also increased by 3 percentage points to 68%. This remains lower than the levels seen at wave 3 (71%).

70% of respondents said they were interested in how the UK trades with countries inside the European Union, and 68% said they were interested in how the UK trades with countries outside the European Union. This included over 1 in 5 respondents who said they were 'very interested' in how the UK trades with countries both inside (23%) and outside the EU (21%).

Interest in how the UK trades with countries in the EU has increased by 2 percentage points since wave 5, while interest in how the UK trades with countries outside the EU is unchanged.

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

Interest in different issues (% interested)

The UK economy: 76%, 76%, 86% ⬆, 83% ⬇, 81% ⬇, 86% ⬆

The UK's approach to environmental issues: 72%, 75% ⬆, 83% ⬆, 80% ⬇, 78% ⬇, 79%

How the UK trades with countries in the EU: 66%, 67%, 75% ⬆, 70% ⬇, 68% ⬇, 70% ⬆

How the UK trades with countries outside the EU: 66%, 68%, 75%, 70%, 68% ⬇, 68% ⬆

UK foreign affairs: 65%, 64%, 71% ⬆, 67% ⬇, 65% ⬇, 68% ⬆

Wave 1 · Wave 2 · Wave 3 · Wave 4 · Wave 5 · Wave 6
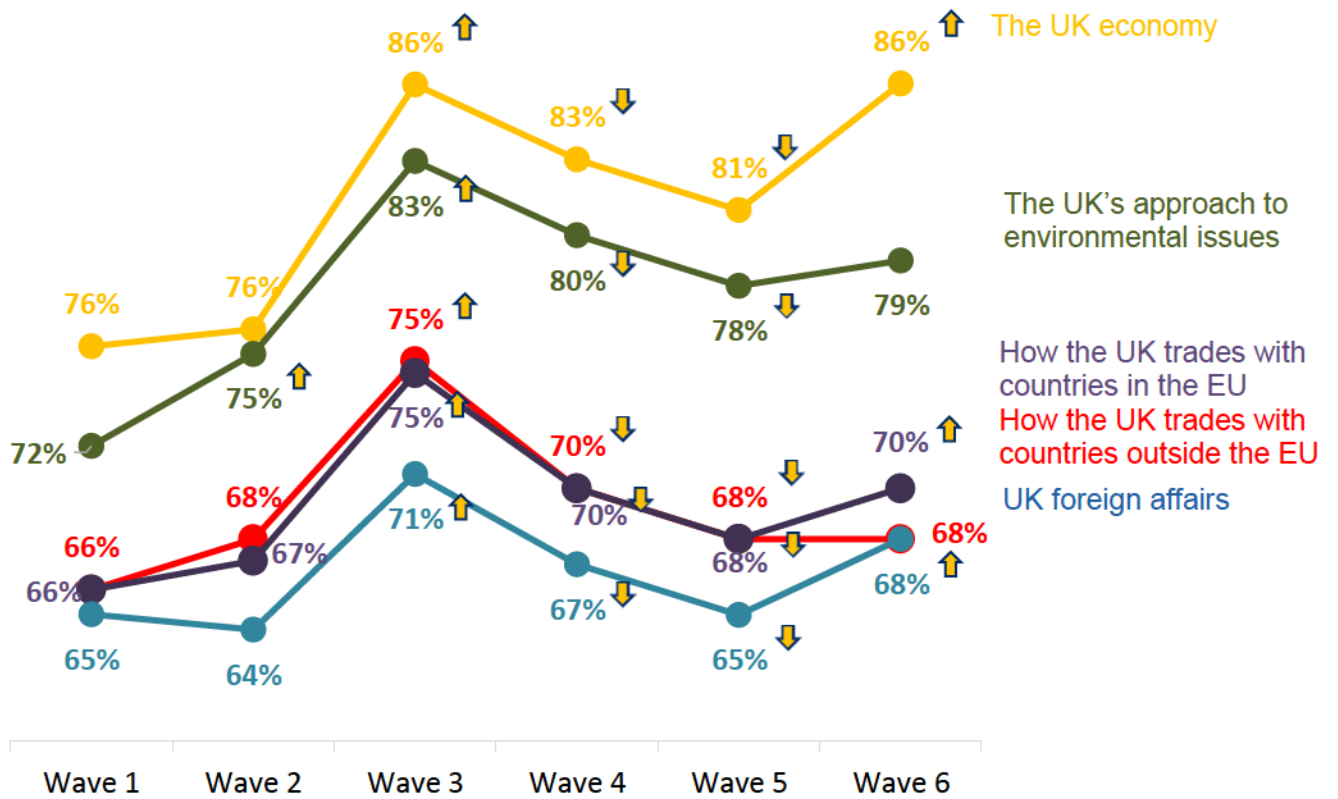
IK1: How interested would you say you are in …?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989, Wave 6 = 3058)
Statistical significance arrows represent significant differences when compared to results observed at previous wave.

3.1.2 Those who were older, in higher socio-economic grades, with a higher household income, or were degree educated continued to be more likely to report interest in how the UK trades with other countries.

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[13].

Consistent with patterns observed in previous waves, and as shown in figure 2, respondents were more likely to report being interested if they:

- were in higher socio-economic grades (SEG): 81% of those in SEG classifications AB said they were either very or fairly interested, as compared to 61% in SEG DE classification[14]

- were older: respondents in older age groups were more likely to report being interested, while the opposite was true of those aged under 24. Of those aged 16 to 24, 56% said they were interested, as compared to 81% of those aged 65 to 74 and 73% of those aged 75 and over

- had obtained degree level qualifications: 80% of those with at least an undergraduate degree level of education reported being interested, as compared to 49% of those with no qualifications

- were men: by a margin of 10 percentage points, men (73%) were significantly more likely than women (63%) to report being interested[15]

- had a higher household income: 79% of those with a household income of £60,000 or more reported being interested, as compared to 57% of those with a household income below £10,000

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[13] 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.
[14] More detail on SEG classifications is provided in the appendix.
[15] Gender differences in interest levels with respect to political 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

Total (3058) — 68%

Gender

Male (1571) — 73% ⬆

Female (1448) — 63% ⬇

Age Groups

16-24 (354) — 56% ⬇

25-34 (486) — 62% ⬇

35-44 (485) — 69%

45-54 (529) — 69%

55-64 (449) — 70%

65-74 (470) — 81% ⬆

75+ (259) — 73% ⬆

Total (3058) — 68%

Socio-Economic Grade (SEG)

DE (952) — 61% ⬇

C1C2 (1047) — 65% ⬇

AB (1059) — 81% ⬆

Household income band

Less than £10,000 (196) — 57% ⬇

£10,000 - £19,999 (373) — 61% ⬇

£20,000 - £29,999 (470) — 66%

£30,000 - £39,999 (432) — 73% ⬆

£40,000 - £49,999 (321) — 73% ⬆

£50,000 - £59,999 (236) — 72%

£60,000 + (618) — 79% ⬆

Qualifications

No qualifications (147) — 49% ⬇

Non-degree (1477) — 66% ⬇

Degree or above (1272) — 80% ⬆
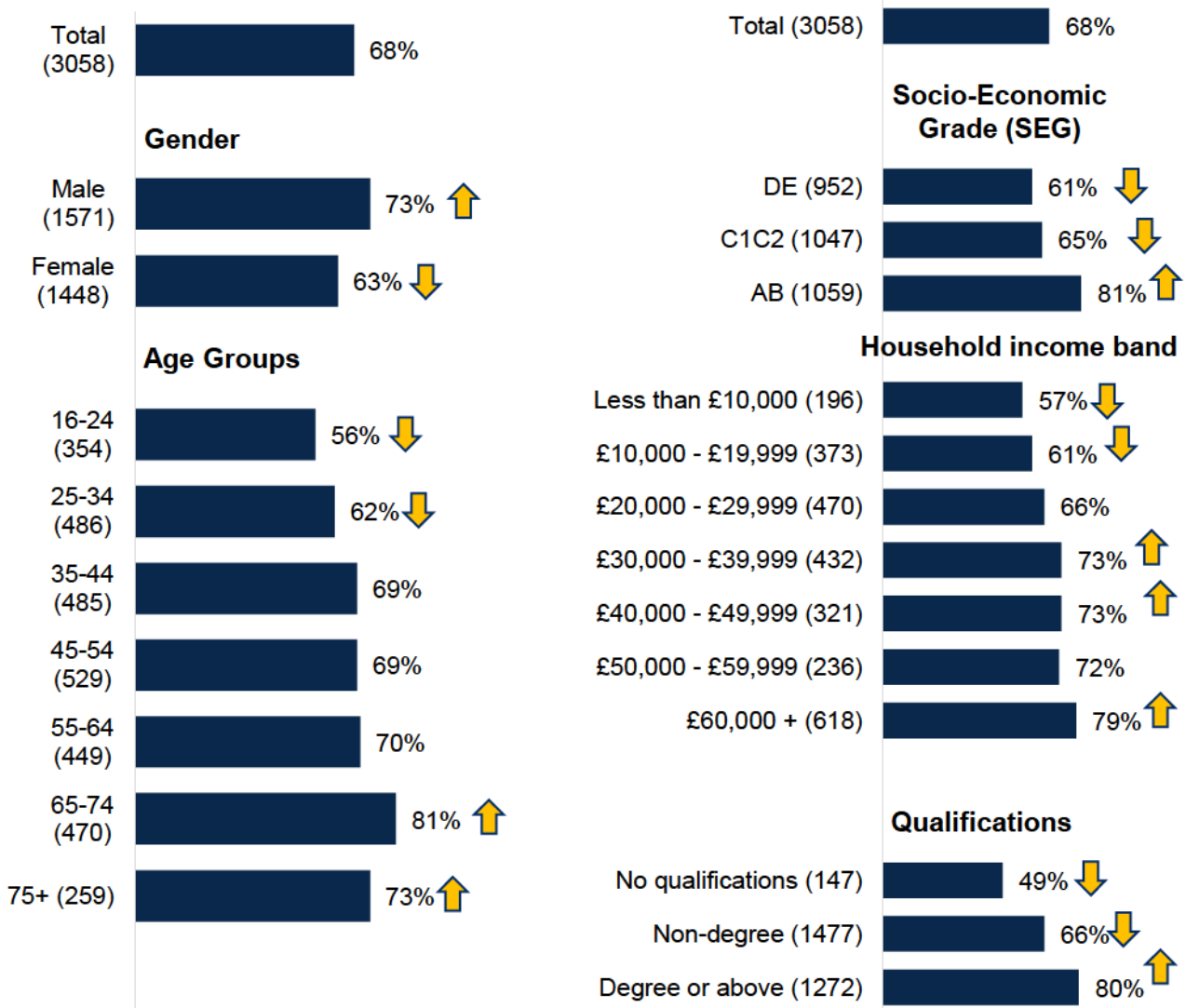
IK1: How interested would you say you are in….? How the UK trades with countries outside the European Union

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.

3.2 Knowledge of free trade

3.2.1 Self-reported knowledge levels of how the UK trades with other countries remained stable.

While around 7 in 10 indicated that they were interested in how the UK trades with other countries (70% were interested in how the UK trades with countries inside the EU, and 68% in how the UK trades with countries outside the EU), only a minority said they felt knowledgeable (see figure 3). The results, therefore, continue to indicate a gap between levels of interest and levels of knowledge.

Around 1 in 3 (35%) respondents said they felt knowledgeable about how the UK trades with countries outside the EU, in line with wave 5 (36%). Slightly more respondents said they felt knowledgeable about how the UK trades with countries in the European Union (38%). Although in line with wave 5 (40%), this is the lowest level single figure for countries inside the EU since tracking began.

This continues to be lower than the proportion who said they felt knowledgeable about the UK economy (63%, a 3 percentage point increase on wave 5 and its joint highest level), the UK's approach to environmental issues (55%, a 3 percentage point decrease on wave 5), and UK foreign affairs (45%).

Figure 3: Self-reported knowledge of how the UK trades with other countries and other topics
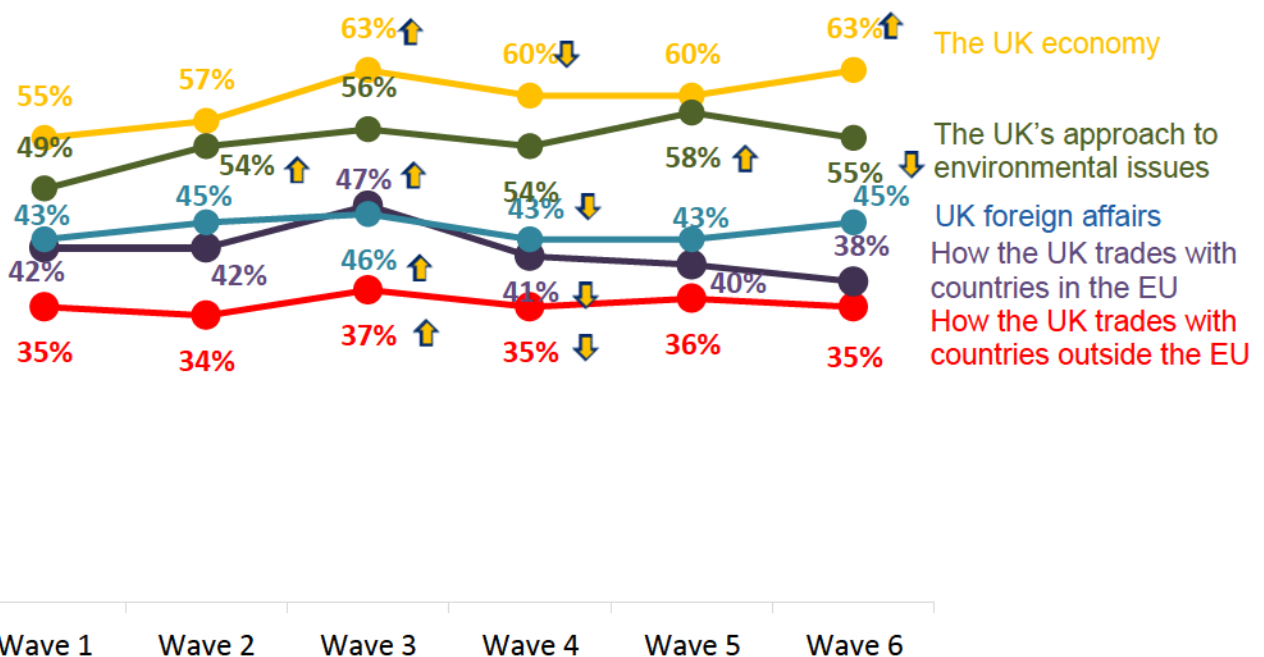
IK2. How knowledgeable would you say you currently are about ...?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989, Wave 6 = 3058)
Statistical significance arrows represent significant differences when compared to results observed at knowledgeable previous wave.

3.2.2 Those who were in higher socio-economic grades, or were degree educated continued to report higher levels of knowledge than average.

Consistent with previous waves, respondents who were in higher socio-economic grades, and degree educated were more likely to say they felt 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 felt about how the UK trades with countries outside the EU[16].

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

- were in higher socio-economic grades (SEG): 42% of respondents from SEG classification AB reported feeling knowledgeable compared to 30% of those in SEG classifications DE

- had obtained degree level qualifications: there continues to be a significant gap between those who had obtained a degree or above level qualifications (41%) and those who had no qualifications (22%)

- were men: men (44%) were 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[17]

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[16] 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.
[17] 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

Total (3058) — 35%

Gender

Male (1571) — 44% ⬆
Female (1448) — 26% ⬇

Age Groups

16-24 (354) — 37%
25-34 (486) — 37%
35-44 (485) — 37%
45-54 (529) — 38%
55-64 (449) — 29% ⬇
65-74 (470) — 32%
75+ (259) — 28% ⬇

Total (3058) — 35%

Social Economic Grade (SEG)

DE (952) — 30% ⬇
C1C2 (1047) — 33%
AB (1059) — 42% ⬆

Income

Less than £10,000 (196) — 28%
£10,000 - £19,999 (373) — 32%
£20,000 - £29,999 (470) — 31%
£30,000 - £39,999 (432) — 37%
£40,000 - £49,999 (321) — 41% ⬆
£50,000 - £59,999 (236) — 33%
£60,000 + (618) — 46% ⬆

Qualifications

No qualifications (147) — 22% ⬇
Non-degree (1477) — 34%
Degree or above (1272) — 41% ⬆
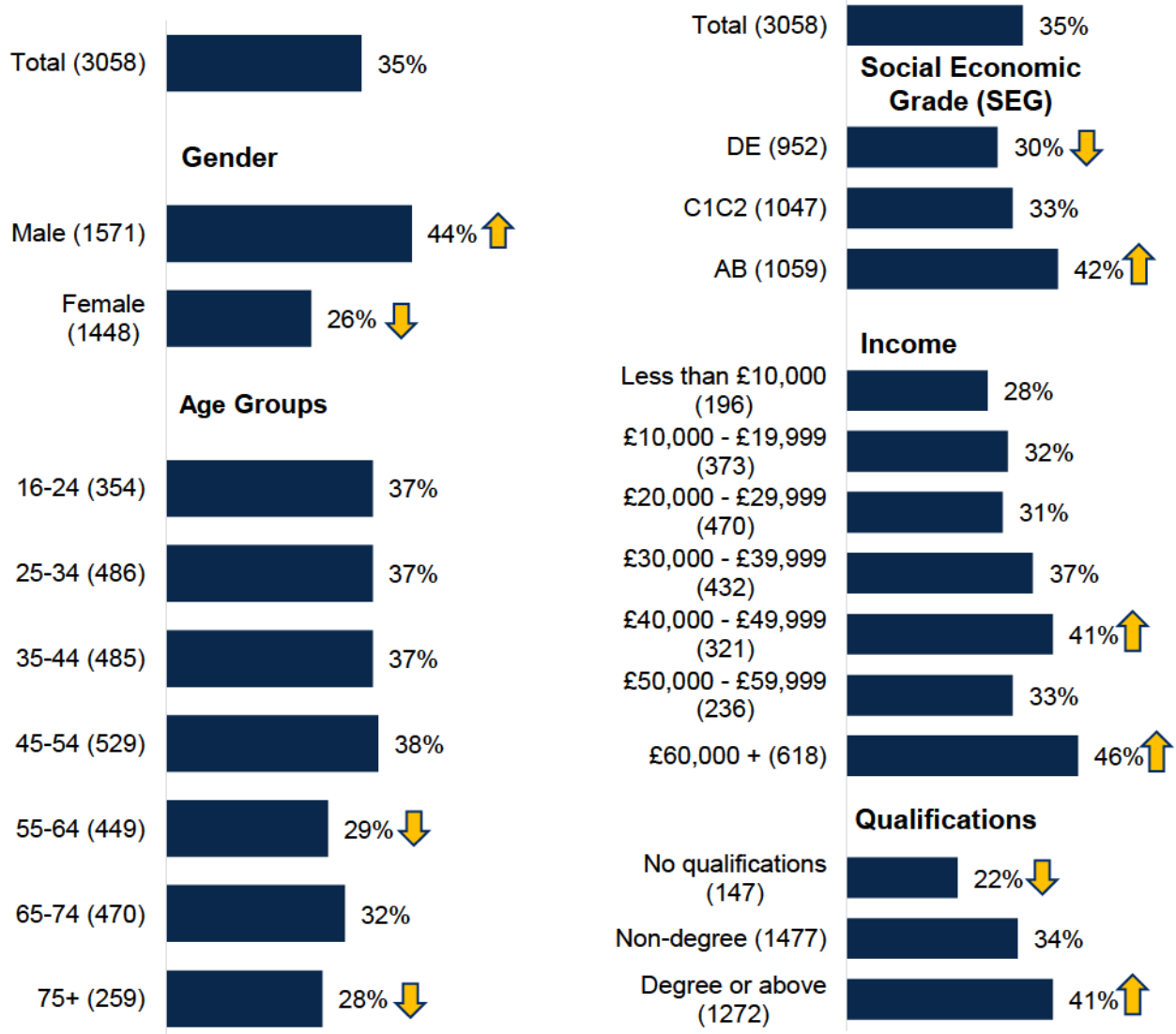
IK2. How knowledgeable would you say you currently are about…? How the UK trades with countries outside the European Union
Unweighted base sizes provided in parenthesis.
Statistical significance arrows represent significant differences against the average result.

3.2.3 The UK and Australia agreement was the trade-related story respondents were most aware of at wave 6, although at lower levels than at wave 5.

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 varied, but most items related to events in the first half of 2022.

Results presented in figure 5 show the UK and Australia free trade agreement was the trade-related story most respondents had heard about (37%), although this was a significant decline on the 46% who had heard of this at wave 5, and now more in line with the 32% who had heard about the signing of the UK-Japan free trade agreement at wave 4.

A lower proportion said they had heard about the UK beginning negotiations for a new trade deal with India (29%). Just one in ten had heard of the UK and GCC beginning negotiations on a new free trade agreement (11%), the signature of a state level agreement on economic cooperation with Indiana (11%) and the DBT consultation on a UK-Switzerland FTA (8%).

Figure 5: Prompted topic recall

Dates	Topic	Percentage
6 February to 5 June 2022	The Queen's Platinum Jubilee	88%
28 July to 8 August 2022	Commonwealth games in Birmingham	70%
April 2019 ongoing	The economic crisis in Sri Lanka	42%
December 2021	The UK and Australia signed a free trade agreement (FTA)	37%
January 2022	The UK beginning negotiations for a new trade deal with India	29%
August to September 2022	The UK and the Gulf Co-operation Council (GCC) began negotiations on a free trade agreement (FTA)	11%
27 May 2022	The signature of a state level agreement on economic cooperation and trade relations between the US state of Indiana and the UK	11%
April to June 2022	The DIT Consultation on a UK-Switzerland Free Trade Agreement (FTA)	8%
	None of the above	5%

CV1. Which of the following topics do you recall having seen or heard about in the last 3 months?
Unweighted base size: (3058)

4   Support for free trade agreements and perceived impact

4.1   Support for free trade agreements

4.1.1 Support for establishing FTAs with other countries remained stable following a decline at wave 5.

Respondents were asked about the extent to which they are supportive of the UK establishing free trade agreements with countries outside of the EU.[18]

As Figure 6 shows, 2 in 3 (67%) respondents said they were supportive of the UK establishing free trade agreements with other countries. Apart from a peak of 70% at wave 4, this is in line with all other waves.

Opposition to establishing free trade agreements with other countries remains very low, with just 4% of respondents opposed, in line with previous waves.

The proportion who neither support nor oppose free trade agreements has remained stable compared to wave 5 (18% at both waves), as has the proportion who are unsure (11% at both waves).

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[18] 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/
It should be noted that changes were made to the question text at wave 3. The question now 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.

Figure 6: Support and opposition to the UK establishing free trade agreements with countries outside the European Union
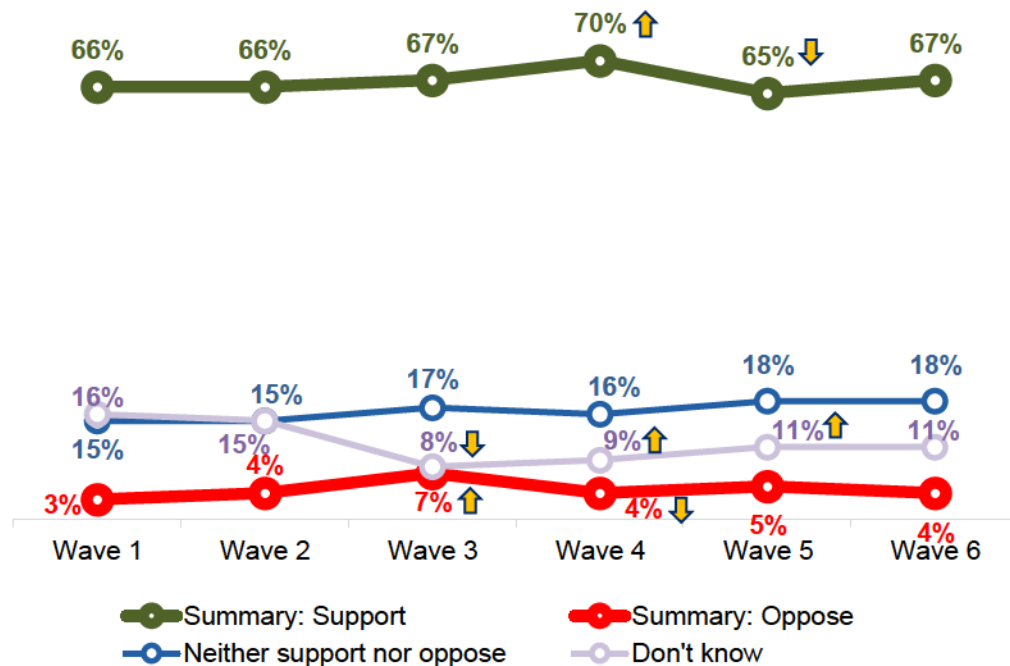
In waves 3, 4, 5 and 6: FT4. In general, would you say that you support or oppose the UK establishing free trade agreements with countries outside the European Union?
In waves 1 and 2: FT4. In general, would you say that you support or oppose free trade agreements?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989, Wave 6 = 3058)
Statistical significance arrows represent significant differences when compared to results in the wave prior.

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

- men: by a margin of 16 percentage points, men (75%) were more likely than women (59%) to say they support the UK establishing free trade agreements with countries outside of the EU

- higher socio-economic grades (SEG): Almost 8 in 10 (77%) of those in SEG classifications AB supported the UK establishing free trade agreements with countries outside of the EU. This compares to 2 in 3 (66%) respondents in SEG classifications C1C2, and 60% of respondents in grades DE

- older people: there was a steady increase in support as you go up the age scale, from 60% of those aged 16 to 24 to 75% of those aged 55 or over being supportive

- those with degree level qualifications: of those with degree or above level qualifications, 3 in 4 (75%) reported being supportive of the UK establishing free trade agreements with countries outside of the EU, as compared to around 2 in 3 (68%) of those with non-degree qualifications, and just above 4 in 10 of those with no qualifications (42%)

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 varied considerably between sub-groups, levels of opposition remain consistently low (only above 10% among Black British respondents at 15%), those who regard themselves as very knowledgeable about how the UK trades with countries within the EU (14%), and those who feel there will be a negative impact of signing FTAs both on the UK overall (35%) and on their daily life (36%). Instead, it is the proportions of those that selected "neither support nor oppose", or to a lesser extent those who said they "don't know", that varied quite considerably.

4.1.2 The key reason provided for supporting trade agreements was the strengthening of the UK economy.

Figure 7 illustrates that, when asked why they support free trade agreements, the top reason given by the public was to strengthen the UK economy (58%) followed by improving trade opportunities for businesses (41%). Around 1 in 3 mentioned the UK's ability to set its own trade policy (36%), lowered prices for consumers (36%) and improved ties with other countries (35%).

Other reasons were mentioned by fewer than 1 in 3 respondents.

Figure 7: Reasons for <u>supporting</u> free trade agreements (where support FTAs)

Reason	%
Strengthened UK economy	58%
Improved trade opportunities for businesses	41%
The UK being able to set its own trade policy	36%
Lower prices for consumers	36%
Improved ties with other countries	35%
More job opportunities	23%
Increased consumer choice	19%
Reduced chance of international conflicts	14%
Making it easier to live and work in other countries	14%
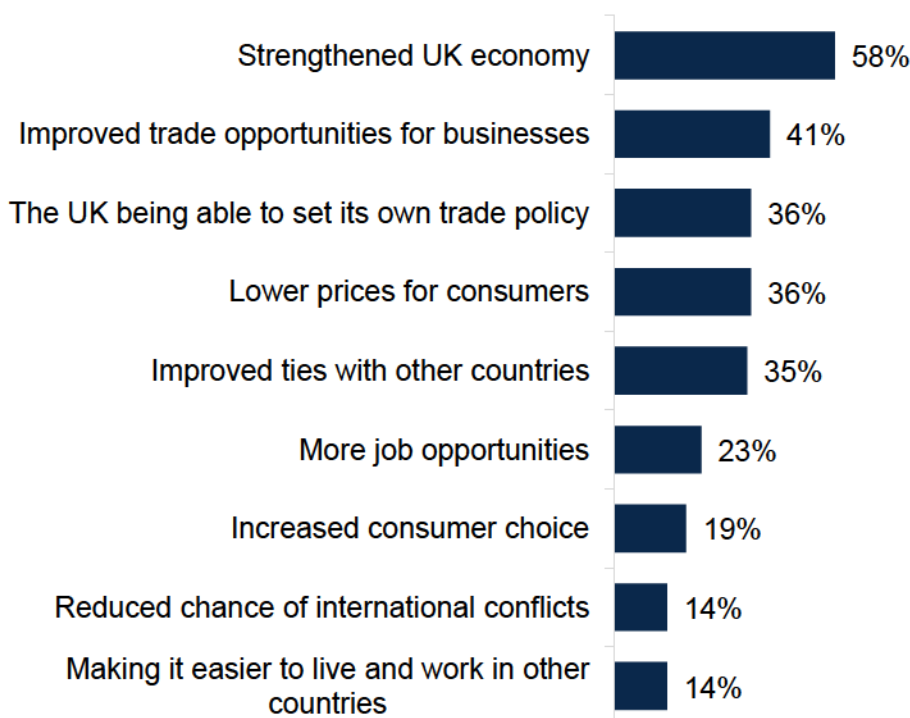
FT5. Which of the following best represent the main reasons you support free trade agreements? New at Wave 6.
Base: Where support free trade agreements (2121)

4.1.3 The key reasons provided for opposing trade agreements were fears over a reduction in safety and food standards, environmental concerns, the effects on key industries and a lack of trust/confidence in the government.

As shown in figure 8 below, when asked why they oppose free trade agreements, the top reason given by the public was the reduction in safety and food standards (41%). Almost 1 in 4 mentioned negative impacts on the environment (37%), detrimental effects on key industries (35%) and lack of trust/confidence in the government (34%).

Other reasons were mentioned by fewer than 1 in 3 respondents.

Figure 8: Reasons for <u>opposing</u> free trade agreements (where oppose FTAs)

Reason	Percentage
Reduced safety and food standards	41%
Negative impact on the environment	37%
Detrimental effects on key industries e.g. agriculture, manufacturing	35%
Lack of trust/confidence in the government	34%
Higher prices for consumers	27%
Negative impact on human rights	23%
Lower wages	21%
Reduces job opportunities	20%
Reduced trade opportunities	14%
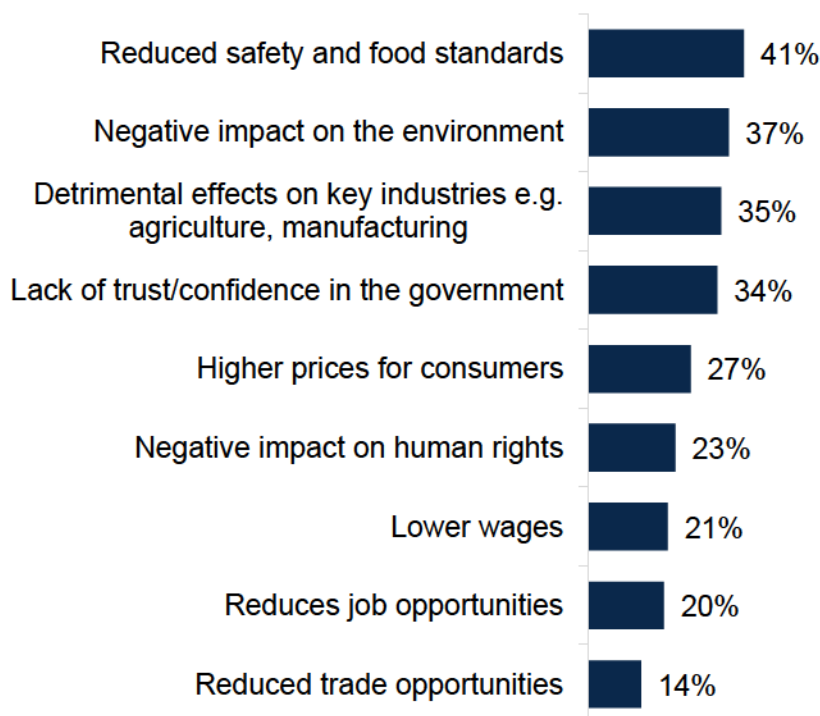
FT5. Which of the following best represent the main reasons you oppose free trade agreements? New at Wave 6.
Base: Where oppose free trade agreements (158)

4.2 Future economic outlook

4.2.1 A much larger proportion of people believed the economy would worsen over the next 12 months than said it would get better.

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 changed following wave 3, where respondents were asked how long they thought it would take for the UK economy to recover from Covid-19 once lockdown restrictions were lifted. Wave 3 fieldwork was carried out between 15 June and 23 August 2020.

Reflecting the current economic situation, and as shown in figure 9, respondents at wave 6 were significantly more pessimistic about the general condition of the economy over the

next year. Three in 5 (60%) expected it to get worse over the next 12 months, almost doubling the 35% who felt this was the case at wave 5, and more than doubling the 27% who felt this was the case at wave 4.

Just 14% expected the economy to improve, a 12 percentage point decrease on the 26% who did so at wave 5, and a 23 percentage point decrease on the 37% who did so at wave 4. One in 5 (20%) felt it would stay the same, a 7 percentage point decrease on wave 5.

Levels of uncertainty in this respect have also reduced, from 12% giving a 'don't know' answer at wave 5 to 7% at the latest wave.

Reported economic optimism has been much higher in previous waves. Before wave 6, those who were pessimistic about the economy had lower support for free trade agreements. As economic optimism declined in wave 6, a decline in support for free trade agreements may have been expected.

However, this hypothesis did not prove true. Economic optimism declined, but support for free trade agreements remained stable overall, and support among those pessimistic about the economy increased. In other words, the more negative economic mood has not damaged the wider case for free trade agreements in a way that one might have expected based on the previous patterns in the data. Instead, the public may see trade as one way of improving the economy and tackling the cost-of-living crisis.

Figure 9: Future economic outlook
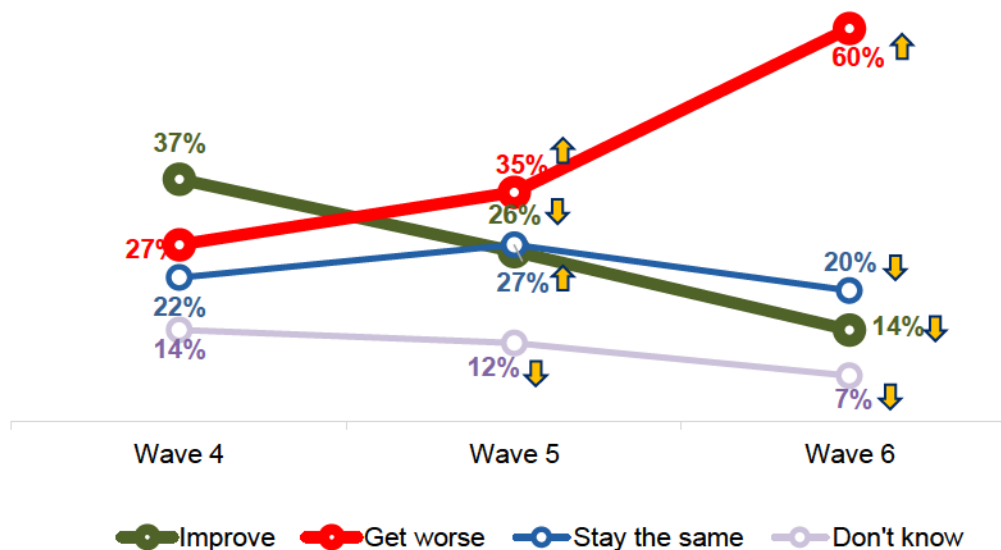
ECON. Do you think the general economic conditions of the country will improve, stay the same or get worse over the next 12 months?
Unweighted base sizes: all respondents (Wave 4 = 4009, Wave 5 = 2989, Wave 6 = 3058)
Statistical significance arrows represent significant differences when compared to results in the wave prior.

As was the case at wave 4, the estimated economic outlook differed significantly by gender, with men more likely to expect an improvement than women (18% compared to

10%), and women more likely than men to think that the economy will get worse (63% compared to 55%).

Age also seems to play a role, but the picture has reversed since wave 5. In wave 5, older generations were more optimistic than younger people (32% of those aged 55 or over felt the economy would improve, as compared to 17% of 16- to 24-year-olds). In wave 6, just 12% of those aged 55 or over believed it would improve, with 68% feeling it would get worse (as compared to 37% at wave 5).

The proportion of 16- to 24-year-olds who believed the economy would get worse has also increased, from 34% at wave 5 to 45% in the latest wave. This was to a much lesser extent than was the case for those aged 55 or over (an uplift of 11 percentage points, as compared to an uplift of 31 percentage points for the older age group).

It is also of note that the proportion of 16- to 24-year-olds who believed the economy would improve has remained consistent (17% at wave 5 and 16% at wave 6), as has the proportion who felt it would stay the same (33% at wave 5 and 31% at wave 6).

Those in Northern Ireland and Scotland were more likely than average to be pessimistic about the economy (67% in both instances believed it would get worse), and those in the East Midlands and London were somewhat more optimistic than average (20% and 18% respectively believed the economy would improve).

White respondents were significantly more likely than respondents in ethnic minority groups to believe the economy would get worse (61% compared to 47%).

By socio-economic group, those in SEG classifications AB were more likely than average to say that the economy would get worse (67%). Those classed as C1C2 were more likely than average to say that the economic situation will stay the same (25%) and those classed as DE were more likely than average not to know (10%).

4.2.2 The way respondents felt about the economy continued to relate to how they felt about trade more broadly.

Figure 10, below, shows how attitudes towards the economy can be 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.[19]

Taking the impact on local jobs as an example, 64% of the proportion who believed the economy would improve also believed increased free trade would lead to significantly improved job opportunities, as compared to less than half of those who believed the economy would stay the same (44%) or that it would get worse (41%).

As with waves 3 and 4, these findings highlight that worsening perceptions may, therefore, not always be related to the specifics of trade, but more to the state of the economy and general levels of economic pessimism. Survey questions about trade-specific matters can become proxies for respondents expressing their wider-held beliefs. Thinking about findings in this context continues to be important when interpreting results.

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[19] 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 10: Impact of free trade on job opportunities and wages by economic outlook

Impact on **job opportunities** (local area)

	Total (3058)	Respondents who think economy will improve (382)	Respondents who think economy will stay the same (559)	Respondents who think economy will get worse (1936)
Don't know	14%	9% ⬇	9% ⬇	17% ⬆
Summary: Negative impact	11%	7%	13% ⬆	10%
No impact	16%	20% ⬇	34% ⬆	32% ⬆
Summary: Positive impact	60%	64% ⬆	44%	41% ⬇

Impact on **wages** (local area)

	Total (3058)	Respondents who think economy will improve (382)	Respondents who think economy will stay the same (559)	Respondents who think economy will get worse (1936)
Don't know	21%	13% ⬇	11% ⬇	22%
Summary: Lower wages	14%	9% ⬇	12%	16% ⬆
No change in wages	40%	34% ⬇	44% ⬆	42% ⬆
Summary: Higher wages	25%	44% ⬆	33% ⬆	19% ⬇

UK3. Now thinking about both the UK as a whole and then just your local area, do you think that increased free trade would have a positive or negative impact on job opportunities?
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 6 = 3058)
Statistical significance arrows represent significant differences when compared to total.

Regression analysis[20] 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 22%. This mirrors findings from previous waves.

How people feel about the economy remains a strong predictor of how they feel about free trade. However, the large decline in economic optimism has not led to a decline in support for the UK establishing FTAs with countries outside the European Union. Figure 11 illustrates that support for FTAs among those who felt the economy will worsen has increased from 56% at wave 5 to 65% at wave 6, and opposition among this group has declined from 11% to 5%. In other words, despite becoming more negative in their outlook for the UK economy, many respondents still say they support FTAs.

Figure 11: Support for FTAs by those that think the economy will worsen
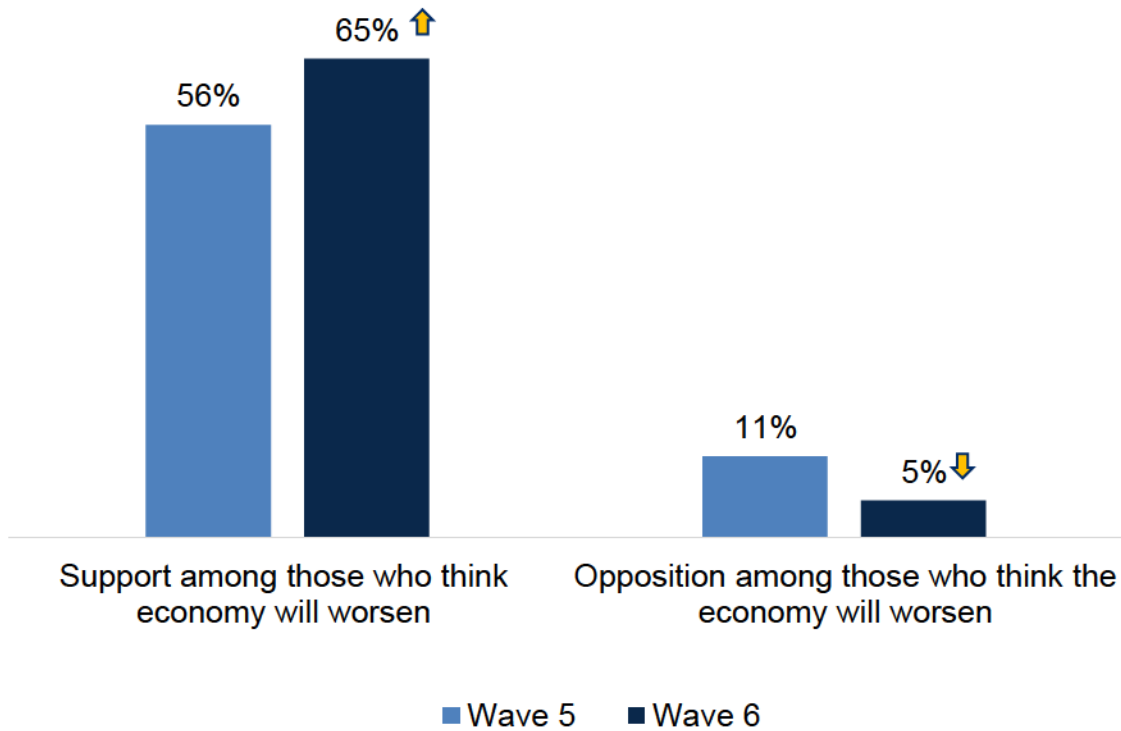
ECON. Do you think the general economic conditions of the country will improve, stay the same or get worse over the next 12 months?
FT4. In general, would you say that you support or oppose the UK establishing free trade agreements with countries outside the European Union?
Unweighted base sizes: all respondents (Wave 5 = 2989, Wave 6 = 3058)
Statistical significance arrows represent significant differences when compared to results in the wave prior.

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

4.3 Perceptions of the impact of free trade agreements

4.3.1 Positive perceptions about the impact of trade on the UK overall and on daily life increased to the highest levels seen so far.

As Figure 12 illustrates, close to 7 in 10 (69%) felt that signing free trade agreements with other countries would have a positive impact on the UK overall. This is a significant uplift on wave 5 (64%), returning to the levels seen at wave 4 (68%), which until now had been the peak.

There has also been an increase since wave 5 in the proportion who felt that the effect would be positive on their daily lives, from 56% to 62%, which also represents a peak on this measure. However, there continues to be a gap between the proportion of respondents who stated free trade agreements will have a positive impact on the UK overall (69%), and those who stated they will have a positive impact on their daily lives (62%).

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

On the UK overall

Summary: Positive: 62%, 63%, 63%, 68%, 64%, 69%
Don't know: 26%, 23%, 17%, 18%, 18%, 14%
Summary: Negative: 7%, 8%, 10%, 6%, 8%, 8%
No impact: 6%, 6%, 10%, 8%, 10%, 9%

— Summary: Positive   — Summary: Negative
— No impact   — Don't know

Wave 1 Wave 2 Wave 3 Wave 4 Wave 5 Wave 6

On you and your daily life

Summary: Positive: 54%, 54%, 52%, 57%, 56%, 62%
Don't know: 27%, 24%, 21%, 20%, 18%, 14%
No impact: 13%, 14%, 18%, 17%, 18%, 17%
Summary: Negative: 6%, 8%, 9%, 6%, 8%, 7%

— Summary: Positive   — Summary: Negative
— No impact   — Don't know

Wave 1 Wave 2 Wave 3 Wave 4 Wave 5 Wave 6

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, Wave 5 = 2989, Wave 6 = 3058).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

4.3.2 Belief that increased free trade would have a positive impact on job opportunities at a UK level was high, but a smaller proportion felt this way when considering opportunities locally.

In addition to exploring the impact of free trade agreements in a more general sense, respondents were asked about their perceptions of the impact in more specific areas. These included jobs, wages, the quality of goods and services, the price of goods and services and the cost of living.

Taking the first of these – jobs – it should be noted that the question wording and response options have changed at wave 6. In previous waves, respondents were asked whether they thought that increased free trade would result in more jobs being created overall, or fewer jobs being created overall. In wave 6, respondents were asked whether they thought that increased free trade would have a positive or negative impact on job opportunities. Consequently, while figure 13 overleaf shows the trend on this measure over time, and shows an upward trend in positive sentiment, the commentary below makes no comparison with results from previous waves.

Three in five (60%) respondents felt that increased free trade would have a positive impact on job opportunities for the UK as a whole. 44% indicated that it would have a positive impact on job opportunities in their local area. In both instances, 1 in 10 felt it would have a negative impact (11% and 10% respectively).

In relation to the impact at a UK level, those aged 16 to 34 were less positive than average (53%) and those aged 55 or over were more positive than average (66%). This pattern is repeated when it comes to the local impact on job opportunities, with 39% of those aged 16 to 34 feeling it would have a positive impact, rising to 48% of those aged 55 or over.

There was little regional variation in views, with the exception that those in the South East were more likely than average to feel increased free trade would have a positive impact on the UK overall (64%). Those in Northern Ireland (54%) and the West Midlands (51%) were more likely than average to feel it would have a positive impact locally in terms of job opportunities.

Figure 13: Perceived impact of free trade on job opportunities

In the UK

Change in question wording at wave 6.

51% 42% ↓ 43% 49% ↑ 49% 60%

24% 24% 24% 23% 19% ↓ 16%
14% 19% ↑ 17% 16% 18% ↑ 14%
11% 15% ↑ 16% 13% ↓ 14% 11%

Wave 1   Wave 2   Wave 3   Wave 4   Wave 5   Wave 6

In my local area

Change in question wording at wave 6.

38% 33% ↓ 33% 38% ↑ 36% 44%
26% 29% ↑ 26% ↓ 26% 29% ↑ 30%
24% 26% 25% 25% 22% ↓ 16%
11% 12% 16% ↑ 12% ↓ 13% 10%

Wave 1   Wave 2   Wave 3   Wave 4   Wave 5   Wave 6

—●— Summary: More jobs/positive impact on job opportunities
—●— Summary: Fewer jobs/negative impact on job opportunities
—○— No change in jobs/neither positive nor negative impact on job opportunities
—○— Don't know

UK3. Waves 1 to 5: 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?
UK3. Wave 6: Now thinking about both the UK as a whole and then just your local area, do you think that increased free trade would have a positive or negative impact on job opportunities?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989, Wave 6 = 3058).
Statistical significance arrows represent significant differences when compared to results in the wave prior.
Statistical significance arrows not added to wave 6 due to the changes in question wording.

4.3.3 The increases seen at wave 5 in the proportion who feel that free trade would lead to higher wages in both the UK and their local area have been maintained, but remain lower than in wave 1.

As shown in Figure 14, the increases seen at wave 5 in the proportion of respondents who felt that increased free trade would result in higher wages both at a national and local level have been maintained at wave 6. Three in ten (31%) felt it would result in higher wages nationally, and a quarter (25%) felt it would do so at a local level. However, in both instances, positive perceptions remained lower than was the case at wave 1.

Perceptions that increased free trade would result in lower wages in the UK and their local area have remained stable, at 15% and 14% respectively.

Those aged 16 to 34 were more likely than average to feel that increased free trade would result in higher wages across the UK (36%). These respondents were also more likely than average to feel that it would result in lower wages (20%). By contrast, those age 55 or over were more likely to feel it would make no difference (38%) or not know (24%). Although on balance they felt it would result in higher (27%) rather than lower (11%) wages across the UK.

This pattern was largely repeated in relation to the impact of increased free trade on wages in their local area. Three in ten (30%) of those aged 16 to 34 felt it would result in higher wages locally, and 17% that it would result in lower wages locally. Again, those aged 55 or over were more likely to feel it would make no difference (44%) or not know (24%), although on balance they felt it would result in higher (21%) than lower (11%) wages across the UK.

By region, respondents in the West Midlands (32%) and Northern Ireland (31%) were more likely than average to feel that increased free trade would result in higher wages, reflecting their greater optimism concerning job opportunities outlined above. By contrast, those in the South West were less likely than average to feel it would lead to increased wages locally (19%).

Figure 14: Impact of trade on wages

In the UK

In my local area

Legend: ──●── Summary: Higher wages ──●── Summary: Lower wages ──○── No change in wages ──○── Don't know
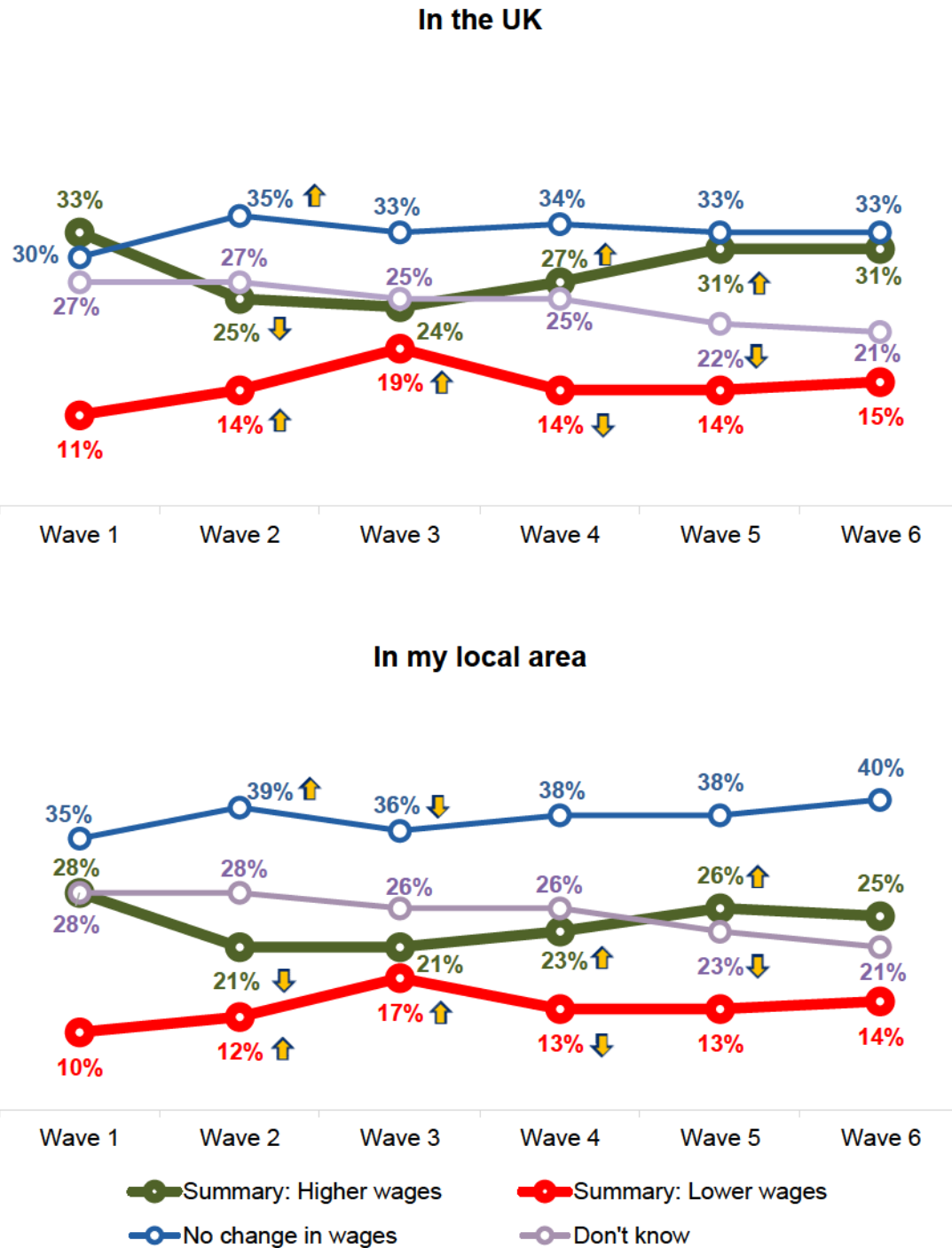
UK4. Do you think that increased free trade would result in higher wages or lower wages? In the UK
UK4. Do you think that increased free trade would result in higher wages or lower wages? Your local area
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989, Wave 6 = 3058).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

4.3.4 There has been a consistent rise since wave 4 in the proportion of the public thinking there would be a decrease in prices as a result of increased free trade. Views on the impact on the quality of products available remained stable.

As illustrated in figure 15, the proportion of respondents who expected prices to decrease as a result of more free trade has increased by 6 percentage points since wave 5 to 45%. This is the highest level seen since the tracker began, with a corresponding decline in the proportion who felt it would lead to higher prices (by 3 percentage points to 23%).

Figure 15: Impact of trade on the price and quality of goods and services

Price of goods and services

Quality of goods and services
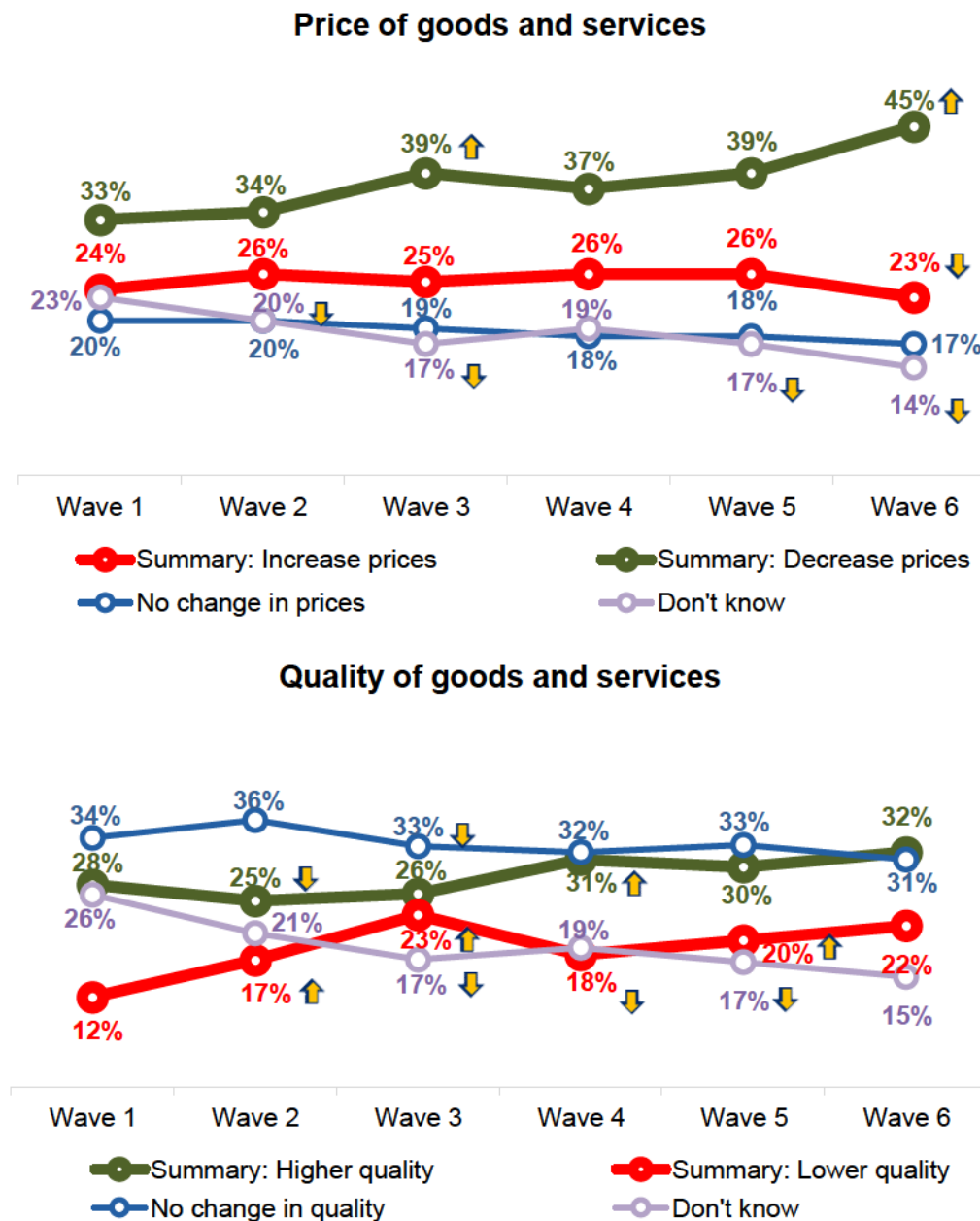
UK5. Thinking about just the UK as a whole, do you think that increased free trade would result in an increase in the price of goods and services, or a decrease in the price of goods and services?
UK6. Still thinking about the UK as a whole, do you think that increased free trade would result in the 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, Wave 5 = 2989, Wave 6 = 3058).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

Looking at these results by sub-groups, men (51%) continue to be significantly more likely than women (39%) to think that free trade will lead to lower prices. It is men that have shown the greatest increases since wave 5 in this respect (plus 9 percentage points compared to plus 3 percentage points for women).

By age, those aged 16 to 34 were more likely than average to believe increased free trade would lead to higher prices (32%), and less likely than average to believe it would lead to decreased prices (38%). This pattern was reversed for those aged 55 or over, with fewer than average believing it would lead to increased prices (19%) and more than average believing it would lead to lower prices (49%).

In addition to the differences outlined above around sex and age, the following groups were also more likely than average to believe that increased free trade would lead to reduced prices:

- those with a household income of £60,000 or more (57%)
- those in SEG classifications AB (55%)
- those educated to a degree level or above (54%)
- those in the least deprived IMD quartile (49%)

By contrast, the following groups were more likely than average to believe that increased free trade would lead to higher prices:

- people from ethnic minority backgrounds (33%)
- those in London (31%) and the North East (32%)
- those in the most deprived IMD quartile (30%)
- those with a household income of less than £10,000 (33%) or between £10,000 and £19,999 (30%)
- those in SEG classifications DE (27%)

The following groups were more likely than average to believe that increased free trade would lead to higher quality goods and services:

- people from ethnic minority backgrounds (45%)
- those in the West Midlands (40%)
- those aged 16 to 34 (36%)
- those in SEG classifications C1C2 (35%)
- men (34%)
- those educated to non-degree level (34%)

The following groups were more likely than average to believe that increased free trade would lead to lower quality goods and services:

- those educated to degree level or above (27%)
- those in the devolved nations (25%)
- those in SEG classifications AB (25%)
- those aged 55 or over (24%)

4.3.5 While a quarter (25%) believed increased free trade would increase the cost of living, two in five (40%) believed it would result in a decrease.

New at wave 6, respondents were asked what impact they felt increased free trade would have on the cost of living, and the results are presented in figure 16. While 25% believed increased free trade would increase the cost of living, 40% believed it would result in a decrease.

Figure 16: Impact of trade on the cost of living

Response	Percentage
Significantly increase the cost of living	7%
Slightly increase the cost of living	18%
No impact on the cost of living	19%
Slightly decrease the cost of living	35%
Significantly decrease the cost of living	4%
Don't know	16%
Summary: Increase	25%
Summary: Decrease	40%
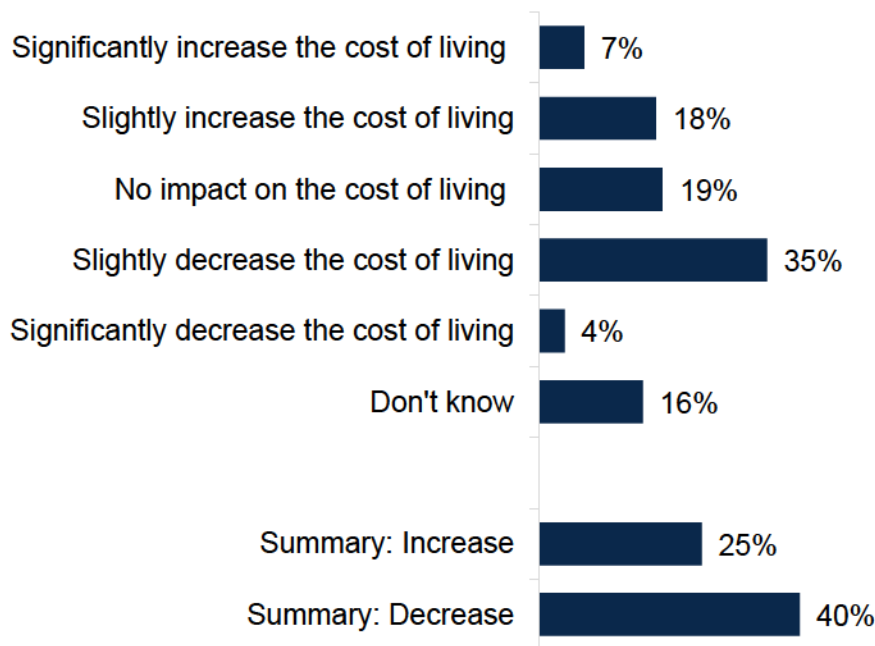
UK7. Thinking about the UK as a whole, what impact do you think increased free trade would have on the cost of living? New at Wave 6.
Base: All respondents (3058)

Men were more likely than women to believe the cost of living would decrease as a result of increased free trade (44% compared to 36%). While women were more likely than men to believe it would increase (27% compared to 23%).

The likelihood of believing the cost of living would decrease increased with age, from 33% of those aged 16 to 34 to 44% of those aged 55 or over. Conversely, the likelihood of believing the cost of living would increase reduced with age, from 33% of those aged 16 to 34 to 22% of those aged 55 or over.

Those in London (32%) and the North East (36%) were more likely than average to believe increased free trade would lead to a rise in the cost of living. As were those of Ethnic minority background (30%) and those in SEG classification DE (28%).

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

4.4.1 Public awareness of CPTPP has remained stable 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. It covers around 500 million people and representing 13% of global GDP in 2020.[21] The UK submitted its application to join CPTPP on 1 February 2021. On 2 June 2021, the CPTPP Commission formally invited the UK to begin accession negotiations. Negotiations about the terms of accession took place between the UK and member countries from July 2021. On 18 February 2022, the UK moved into the final stage of the accession process, market access negotiations.[22] Following successful completion of this, on 31 March 2023 the UK concluded negotiations to join the CPTPP. At the time of interviewing for wave 6 of the PATT, this had not yet occurred.

The proportion of respondents who knew about CPTPP or TPP was consistent with waves 4 and 5 (28% compared to 28% in wave 5 and 27% in wave 4, as shown in figure 17). The proportion who had heard about the name of the CPTPP or its predecessor, the Trans-Pacific Partnership (TPP), but otherwise knew nothing about it was also consistent with wave 5 (22% compared to 23%), having reduced from 26% at wave 4.

Awareness as measured in wave 3 onwards continues to be higher than in waves 1 and 2. However, some caution is recommended when comparing results from the 2 first waves with those of the 4 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.[23]

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[21] From https://www.bbc.co.uk/news/explainers-55858490
[22] More details: https://www.gov.uk/government/news/trade-secretary-secures-major-trade-bloc-milestone-ahead-of-asia-visit
[23] 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 17: Awareness of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) or the Trans-Pacific Partnership (TPP)
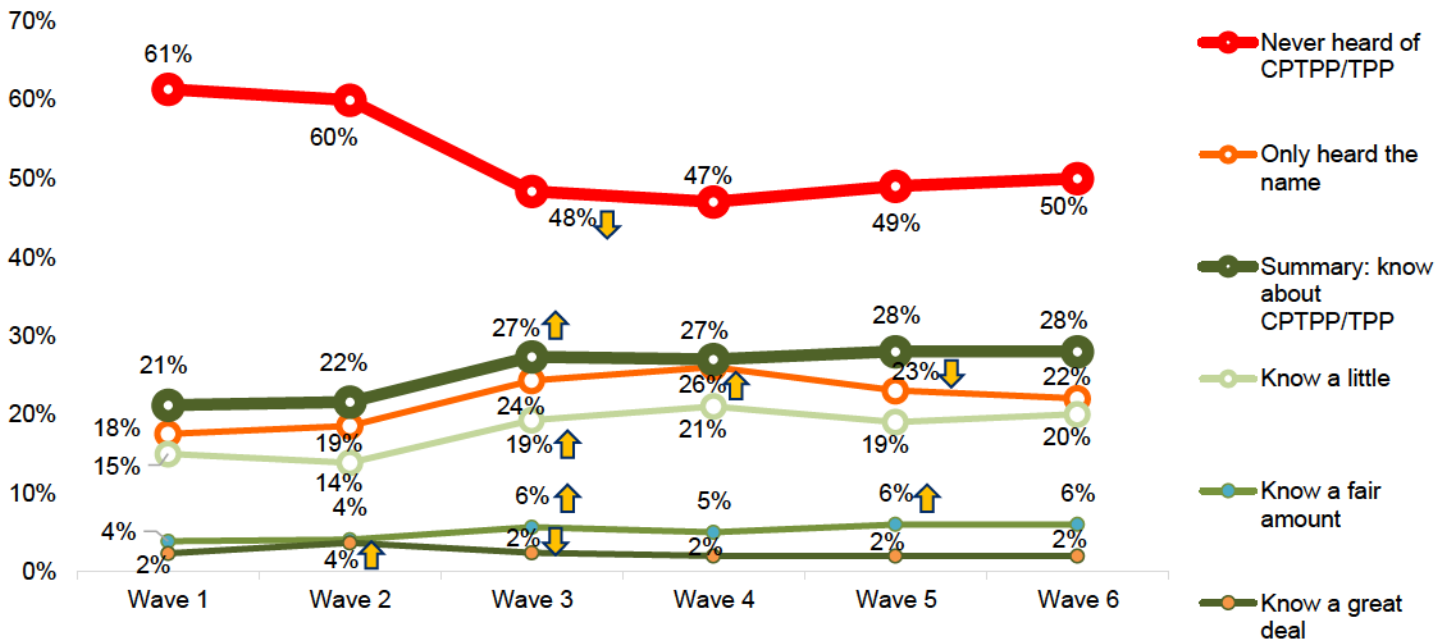
CPTPP. How aware are you of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) formerly known as Trans-Pacific Partnership (TPP)?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989, Wave 6 = 3058).
Statistical significance arrows represent significant differences when compared to results in the wave

4.4.2 Support for the UK joining the CPTPP remains high.

Respondents were then asked whether they would support the UK joining the CPTPP (see figure 18). 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). From wave 4 all respondents were asked this question. To make results comparable to previous waves, waves 4, 5 and 6 results shown in figure 18 are also based on those who had some degree of awareness of the CPTPP.

Support amongst those who indicated awareness of the agreement was 59%, in line with the 57% who supported it in wave 5, but 4 percentage points lower than the peak level seen at wave 4. At 19%, opposition was also in line with results from wave 5.

Figure 18: Support for the UK to join the CPTPP (respondents who know at least a little about CPTPP)
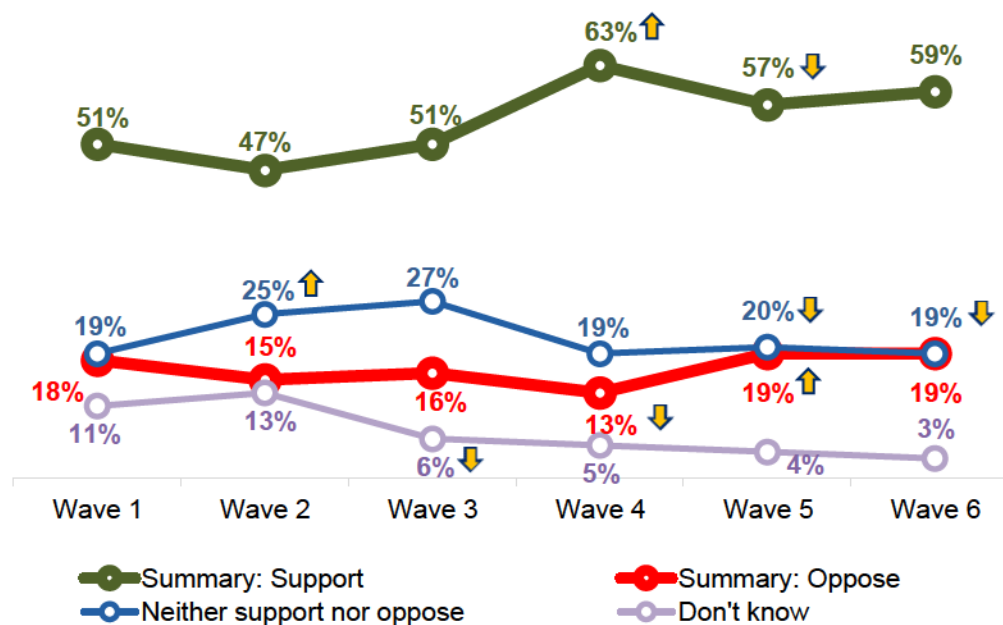
CPTPPa. To what extent would you support or oppose the UK joining the CPTPP?
Unweighted base sizes: respondents who know at least a little about the CPTPP or TPP (Wave 1 = 538, Wave 2 = 529, Wave 3 = 958, Wave 4 = 1206, Wave 5 = 911, Wave 6 = 927)
Statistical significance arrows represent significant differences when compared to results in the wave prior.

4.5 The Gulf Cooperation Council (GCC)

4.5.1 Awareness of the Gulf Cooperation Council remains low, with over half saying that they have never heard of it, although there has been an increase in the proportion who know the name.

Respondents were asked about their awareness of the Gulf Cooperation Council (GCC). This question was asked for the first time at wave 5. The Gulf Cooperation Council (GCC) is a regional trade union between Saudi Arabia, the United Arab Emirates, Bahrain, Kuwait, Oman, and Qatar.

As figure 19 shows, the majority of respondents (56%) had never heard of the GCC, but this is lower than the 63% who had never heard of it at wave 5. However, the uplift was among those who had heard the name but knew nothing about it, from 15% to 20%, rather than among those who had some knowledge about it (24% compared to 22% at wave 5).

As in wave 5, the following groups were more likely than average to know at least a little about the GCC:

- those with a household income of £60,000 or more (35%)

- ethnic minority respondents (35%)

- respondents aged 16 to 34 (32%)

- men (32%)

- those in SEG classifications AB (32%)

- those based in London (31%)

- and respondents educated to degree level or above (31%).

Figure 19: Awareness of the Gulf Cooperation Council (GCC)
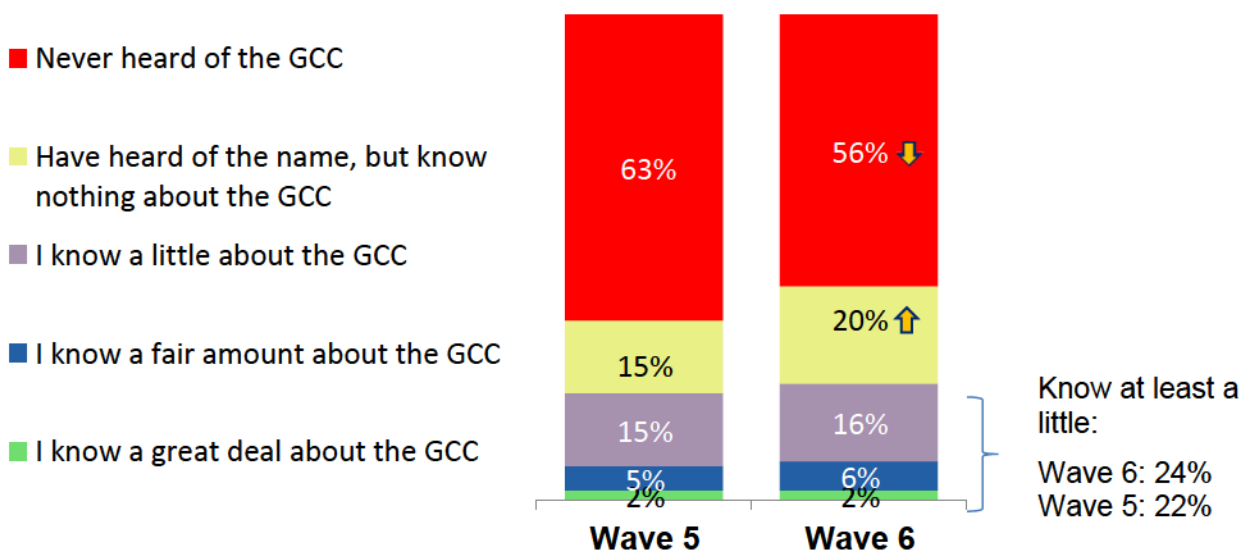
GCC. How aware are you of the Gulf Cooperation Council (GCC)?
All respondents (Wave 5 = 2989, Wave 6 = 3058)
Statistical significance arrows represent significant differences when compared to results in the wave prior.

4.5.2 Levels of support for the UK establishing a free trade agreement with the GCC were higher than levels of opposition.

Figure 20 shows levels of support and opposition to the UK establishing a free trade agreement with the Gulf Cooperation Council (GCC). Over a third (36%) of respondents said they would support the UK establishing a free trade agreement with the GCC. One in five (22%) opposed this, while 25% offered a neutral opinion, and 17% did not know.

This suggests that the public have warmed towards a trade agreement with the GCC. These levels of support are higher than was the case at wave 5 with regard to the UK entering into formal trade talks with the GCC (28%).

Figure 20: Support for the UK establishing a free trade agreement with the GCC
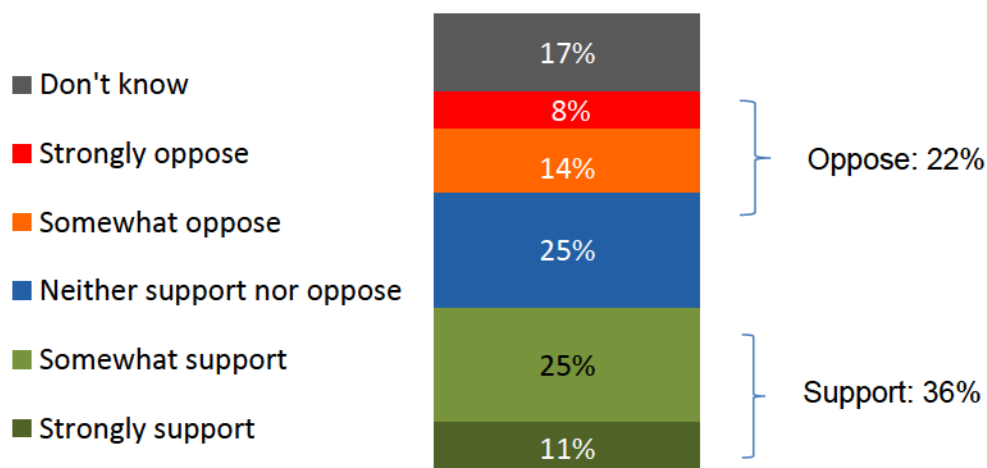
GCCA. The Gulf Cooperation Council (GCC) is a regional trade union between Saudi Arabia, United Arab Emirates, Bahrain, Kuwait, Oman, and Qatar. The UK has begun negotiations with the GCC. To what extent would you support or oppose the UK establishing a free trade agreement with the Gulf Cooperation Council?
All respondents (Wave 6 = 3058)

The following groups were more likely than average to support the UK establishing a free trade agreement with the GCC:

- men (44%)

- those in Wales (43%)

- those in the least deprived quartile (first quartile, 42%)

- those in SEG classifications AB (42%)

- those aged 55 or over (40%)

- those educated to non-degree level (39%)

4.6   MERCOSUR

4.6.1 Awareness of MERCOSUR was low, with over two-thirds having never heard of it.

For the first time at wave 6, respondents were asked about their awareness of MERCOSUR, the South American trade agreement made up of Argentina, Brazil, Paraguay, Uruguay and Venezuela.

As figure 21 illustrates, the majority (68%) of respondents had never heard of MERCOSUR, while 20% said they knew at least a little about MERCOSUR.

Figure 21: Awareness of MERCOSUR
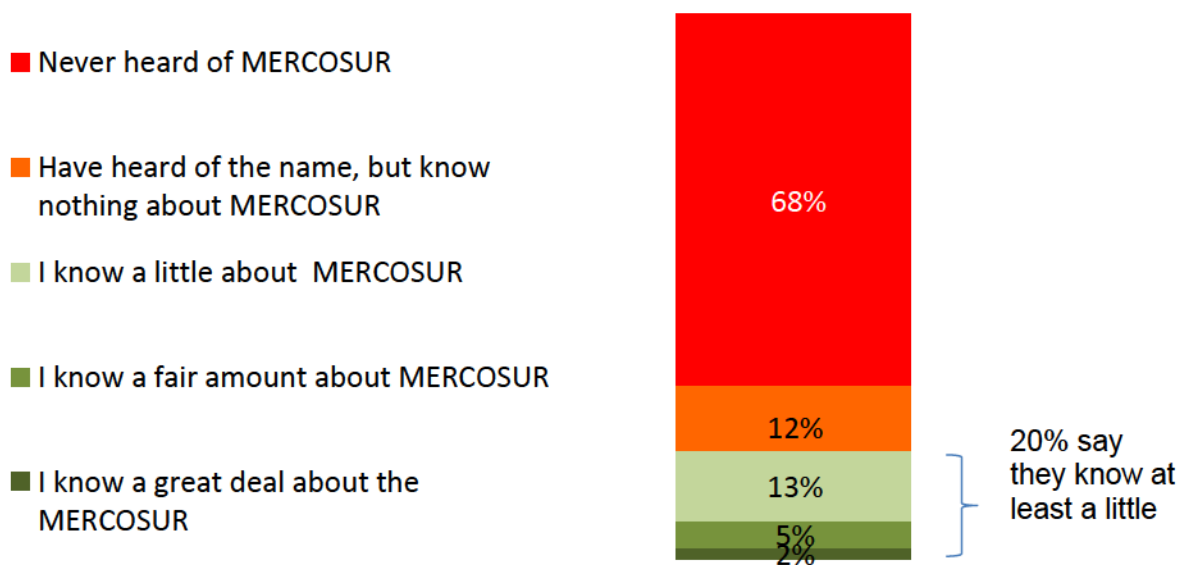
GCC. How aware are you of MERCOSUR, the South American trade bloc?
All respondents (Wave 6 = 3058)
New at wave 6

The following groups were more likely than average to know at least a little about MERCOSUR:

- those from an ethnic minority (33%)

- those aged 16 to 34 (31%)

- those based in London (29%)

- those with a household income of £60,000 or more (28%)

- men (27%)

- those educated to degree level or above (25%)

- those in the most deprived IMD quartile (25%)

- those in SEG classifications AB (23%) and C1C2 (24%)

4.6.2 Support for the UK establishing a free trade agreement with MERCOSUR was low, reflecting sizeable neither/nor and don't know responses rather than firm opposition.

Figure 22 shows levels of support and opposition to the UK establishing a free trade agreement with MERCOSUR.

Over a third (37%) of respondents said they would support the UK establishing a free trade agreement with MERCOSUR, and 13% said they would oppose it. Three in 10 (30%) had no strong opinion either way, and a further 2 in 10 (20%) did not know.

Figure 22: Support for the UK establishing a free trade agreement with MERCOSUR
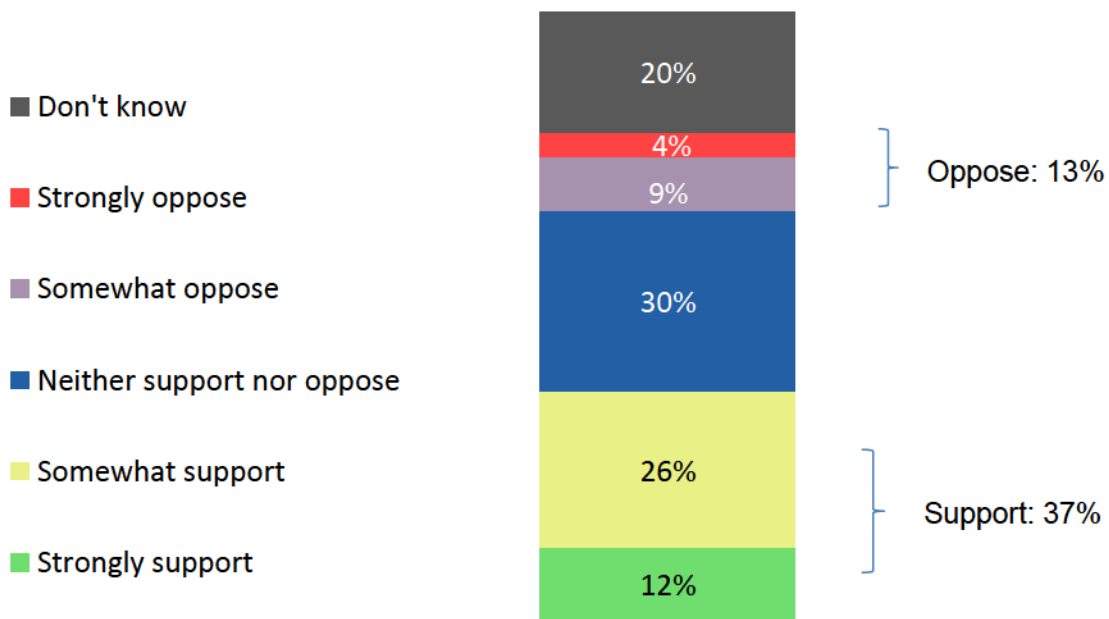
MER2. MERCOSUR is a South American trade bloc (a group of nations that trade with each other) and customs union whose member states include Argentina, Brazil, Paraguay, and Uruguay. To what extent would you support or oppose the UK establishing a free trade agreement with MERCOSUR?
All respondents (Wave 6 = 3058)
New at wave 6

The following groups were more likely to support the UK establishing a free trade agreement with MERCOSUR:

- men (45%)

- those educated to degree level or above (46%)

- those in SEG classifications AB (47%)

- those with household incomes above £60,000 (48%)

4.7 Attitudes towards trade and purchasing

4.7.1 People 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 the cross-border sharing of data.

Using a grid format, 8 questions using a 0 to 10 scale with statements expressing opposing sentiments about liberalised trade at each end were put to respondents. The results have been presented in figures 23 and 24. They show that the UK public tended to demonstrate liberal, free trade attitudes, rather than taking protectionist positions.[24]

Two in 5 (42%) respondents indicated a preference towards the liberal end of the scale, regarding tax-free trade as an effective way for the economy and businesses to grow. Just 9% chose to express a preference that it is best to protect our domestic industries by applying higher taxes on imports.

Likewise, 2 in 5 (41%) favoured prioritising the worldwide supply of essential goods, allowing food and medicines to cross borders. Just 15% favoured the notion of preventing UK goods from being exported at the other end of the scale.

One area where there are higher levels of agreement at the protectionist end of the scale is concerning 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. Considerably fewer respondents prefer consumer data being shared freely and openly across borders to support innovation, collaboration and boost economic growth (12%).

While less marked, protectionist views were also evident in relation to imports. With 35% of respondents showing a preference that following Covid-19 the UK should become self-sufficient and less reliant on imports from other countries. While 24% believing the UK should embrace international free trade, ensuring a free flow of imports.

A similar pattern was evident in relation to focusing on our own industries so we can supply ourselves. This is opposed to prioritising signing agreements with as many countries as possible so we have lots of options to source goods for us to buy.

This was also the case in relation to the UK's trading relationships. Close to two in five (37%) believed that the UK should only have trading relationships with like-minded democracies that respect equality and the rule of law. Even if this limits exporting opportunities for UK businesses and consumers lose out on cheaper or better goods and services. By contrast, 21% felt that the UK should embrace international trade to bring benefits to consumers, even if that means trading with nations that do not have our standards on democracy and equality.

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[24] Scores were given on a 1 to 7 scale. Scores of 7 to 10 are considered to indicate preference for one statement, and of 0 to 3, considered preference for the other.

Figure 23: Protectionist versus liberal free trade attitudes

Protectionist agenda

Liberal agenda

It's best to protect our own domestic industries by applying higher taxes to imports.

Category	9%				37%			42%			
	0	1	2	3	4	5	6	7	8	9	10
%	3%	1%	2%	4%	6%	20%	10%	12%	9%	4%	18%

Tax-free trade between different countries is the most effective way to encourage our businesses and economy to grow.

We should prevent essential goods manufactured in the UK from being exported, allowing us to assist our own nation best.

Category	15%				36%			41%			
	0	1	2	3	4	5	6	7	8	9	10
%	5%	2%	3%	4%	7%	20%	9%	11%	8%	4%	18%

We should prioritise protecting the worldwide supply of essential goods, allowing food and medicines to cross borders.

For our economic recovery following COVID-19 the UK should become self-sufficient and less reliant on imports from other countries.

Category	35%				32%			24%			
	10	9	8	7	6	5	4	3	2	1	0
%	15%	3%	7%	9%	9%	17%	7%	7%	5%	3%	8%

For our economic recovery following COVID-19 the UK should embrace international trade, ensuring a free flow of imports.

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 (3058).
*Figures for don't know are not shown to ease reading

Figure 24: Protectionist versus liberal free trade attitudes (2)

Protectionist agenda (left) — **Liberal agenda** (right)

Tight controls should be placed on the cross-border sharing of consumer data to ensure everyone's privacy is protected and data is used appropriately. (left)

Consumer data should be shared freely and openly across borders to support innovation, collaboration and boost economic growth. (right)

Bracket	50%				29%			12%			
Value	26%	6%	9%	9%	7%	17%	5%	4%	3%	1%	4%
Scale	10	9	8	7	6	5	4	3	2	1	0

We should focus on building our own industries so we can supply ourselves. (left)

The UK should prioritise signing agreements with as many countries as possible so we have lots of options to source goods for us to buy. (right)

Bracket	36%				36%			20%			
Value	16%	3%	6%	10%	11%	18%	7%	6%	4%	2%	7%
Scale	10	9	8	7	6	5	4	3	2	1	0

The UK should only have trading relationships with like-minded democracies that respect equality and the rule of law, even if these limits exporting opportunities for UK businesses and consumers lose out on cheaper or better goods and services. (left)

The UK should embrace international trade to bring benefits to consumers, even if that means trading with nations that don't have our standards on democracy and equality. (right)

Bracket	37%				33%			21%			
Value	14%	5%	8%	9%	8%	17%	7%	6%	6%	2%	8%
Scale	0	1	2	3	4	5	6	7	8	9	10

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 (3058)
Figures for don't know are not shown to ease reading

4.7.2 Views are balanced as to the importance of buying British.

When using an 11 point scale and grouping those scoring the top and bottom four boxes as agreeing with the statement at each end of the scale views on buying British are balanced. Approximately equal proportions agreed that buying British products is very important to them and a top priority when shopping (29%). Conversely, 33% would buy products from any country as long as it is the best price or quality, as shown in Figure 25.

Similarly, approximately equal proportions agreed that they always check where a product is from as country of origin is very important to them (30%) as agreed that they never check where a product is from as country of origin is not important to them at all (28%).

Figure 25: Purchasing attitudes

Buying British products is very important to me, and it's one of my top priorities when shopping.

29%
- 0: 12%
- 1: 4%
- 2: 6%
- 3: 8%

32%
- 4: 8%
- 5: 17%
- 6: 7%

33%
- 7: 7%
- 8: 7%
- 9: 3%
- 10: 16%

I'll buy products from any country as long as it's the best price or quality.

I always check where a product is from as country of origin is very important to me.

30%
- 0: 12%
- 1: 4%
- 2: 6%
- 3: 8%

36%
- 4: 8%
- 5: 21%
- 6: 7%

28%
- 7: 8%
- 8: 7%
- 9: 3%
- 10: 10%

I never check where a product is from as country of origin is not important to me at all.

CV3: 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 (3058)
Figures for don't know are not shown to ease reading

54

4.7.3 Protectionist and liberal sentiment remained relatively consistent with wave 5.

Building on the results from Figures 24, 25 and 26, Table 3 shows the differences in levels of protectionism and liberalism between waves 3 to 6.

As shown below, protectionist positions were relatively consistent with wave 5, with the exception that a higher proportion favoured post-Covid self-sufficiency (35% compared to 32% at wave 5).

Liberal sentiments were consistent with wave 5.

Table 2: Protectionist versus liberal free trade attitudes – differences between waves 3, 4, 5 and 6

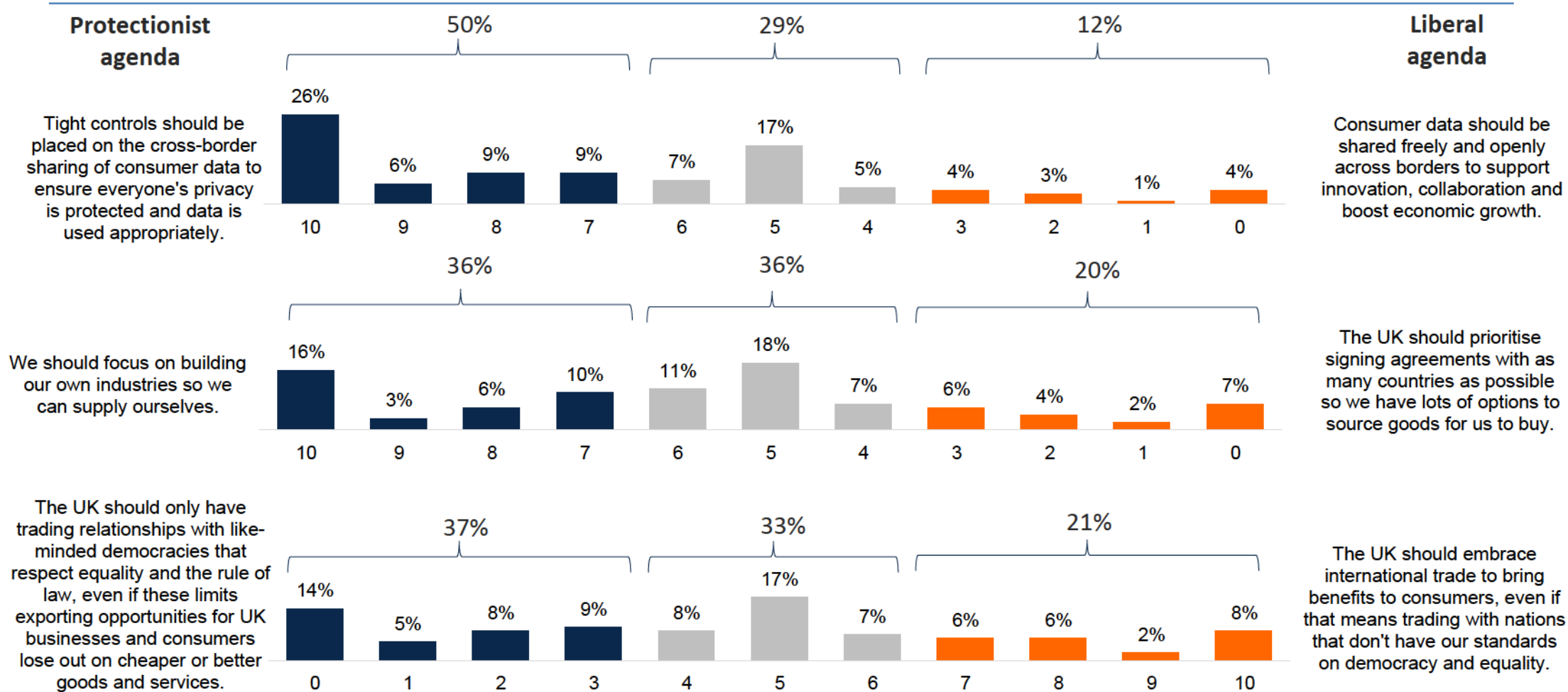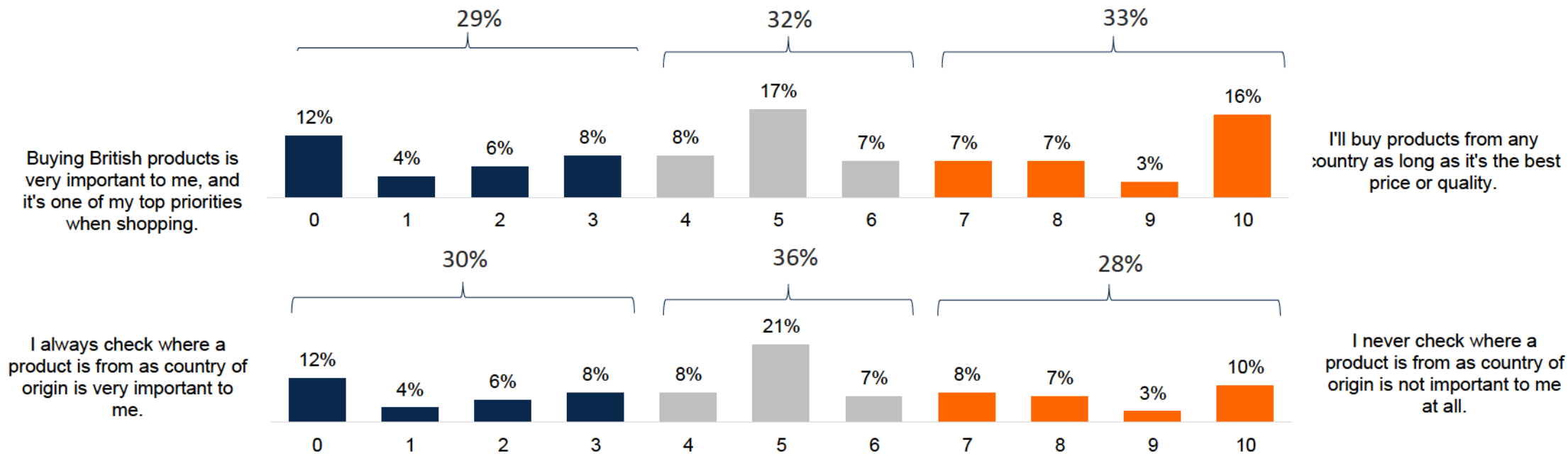| Question scale Protectionist end	Question scale Liberal end	Protectionist Wave 3	Protectionist Wave 4	Protectionist Wave 5	Protectionist Wave 6	Liberal Wave 3	Liberal Wave 4	Liberal Wave 5	Liberal Wave 6
It's best to protect our own domestic industries by applying higher taxes to imports.	Tax free trade between different countries is the most effective way to encourage our businesses and economy to grow.	12%	8% ⬇	11% ⬆	9%	43%	47% ⬇	43%	42%
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% ⬇	16%	15%	40%	41%	41%	41%
We should focus on building our own industries so we can supply ourselves.	The UK should prioritise signing agreements with as many countries as possible so we have lots of options to source goods for us to buy.	Not asked	33%	37% ⬆	36%	Not asked	21%	20%	20%
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 and exports of goods and services.	35%	29% ⬇	32% ⬆	35% ⬆	27%	26%	24%	24%
Tight controls should be placed on the cross-border sharing of consumer data to ensure everyone's privacy is protected and data is used appropriately.	Consumer data should be shared freely and openly across borders to support innovation, collaboration and boost economic growth.	Not asked	50%	49%	50%	Not asked	12%	12%	12%
The UK should only have trading relationships with like-minded democracies that respect equality and the rule of law, even if these limits exporting opportunities for UK businesses and consumers lose out on cheaper or better goods and services.	The UK should embrace international trade to bring benefits to consumers, even if that means trading with nations that don't have our standards on democracy and equality.	Not asked	Not asked	36%	37%	Not asked	Not asked	22%	21%

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, wave 5 = 2989, wve 6 = 3058)

5   Trading partner preferences

5.1   Support for establishing free trade agreements with specific countries

5.1.1   Support for establishing trade deals with Switzerland and the USA is high, and around half support trade deals with Indonesia and India. Support for a deal with India has risen since wave 6. However, opposition to establishing a trade deal with China outweighs support.

Respondents were presented with 8 countries and asked to what extent they would support or oppose the UK establishing a free trade agreement with them. Findings are presented in Table 4. In addition to countries that have been tracked over multiple previous waves, for the first time at wave 6 the countries asked about included Switzerland, Indonesia, South Korea and Turkey.

Support for securing a free trade agreement with Switzerland drew the highest levels of support (64%), followed by the USA (63%). Levels of support for FTAs with these two countries almost matched that for FTAs with other countries generally (67%). Around half supported the establishment of a free trade agreement with Indonesia (47%), India (50%) and South Korea (49%).

Support for free trade agreements with Turkey and the UAE was lower, with around two in five supporting each (40% and 38% respectively).

Views on the establishment of free trade agreements with Saudi Arabia and China were more balanced. Approximately as many respondents support (32% in both instances) and oppose (30% and 34% respectively).

Table 3: Support and opposition to establishing free trade agreements[25]

	All countries asked about	Swit-zerland	USA	Indonesia	India	South Korea	Turkey	UAE	Saudi Arabia	China
Strongly support	37%	33%	34%	15%	17%	20%	11%	13%	11%	10%
Somewhat support	29%	31%	29%	32%	33%	29%	28%	25%	21%	22%
Neither support nor oppose	18%	20%	16%	30%	25%	24%	31%	26%	25%	23%
Somewhat oppose	3%	3%	7%	7%	9%	8%	11%	12%	15%	18%
Strongly oppose	1%	2%	4%	3%	6%	6%	6%	11%	15%	17%
Don't know	11%	11%	10%	13%	11%	13%	13%	13%	13%	11%
Summary: support	**67%**	**64%**	**63%**	**47%**	**50%**	**49%**	**40%**	**38%**	**32%**	**32%**
Summary: oppose	**4%**	**5%**	**11%**	**10%**	**15%**	**14%**	**17%**	**23%**	**30%**	**34%**
NET score	**+62%**	**+59%**	**+52%**	**+37%**	**+35%**	**+35%**	**+23%**	**+15%**	**+2%**	**-2%**

FT4. In general, would you say that you support or oppose the UK establishing free trade agreements with countries outside the European Union?
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 (3058)

[25] The USA, China and India have been included in all waves conducted to date. The United Arab Emirates and Saudi Arabia have been included since wave 4. Switzerland, Indonesia, Turkey and South Korea were introduced at wave 6.

5.1.2 Support for FTAs with all countries has increased since wave 5. Support for an FTA with the USA is at its highest since the study began, but remains relatively low for Saudi Arabia, China and the UAE.

Figure 26 shows how support for free trade agreements with individual countries has changed over the waves for those countries included in multiple waves.

In each instance, levels of support compared to the previous wave have increased: by 10 percentage points for India to 50%, by 9 percentage points for the UAE to 38%, by 6 percentage points for the USA to 63%, by 6 percentage points to 32% for Saudi Arabia, and by 2 percentage points for China.

Figure 26: Changes in support for establishing free trade agreements with a selection of countries
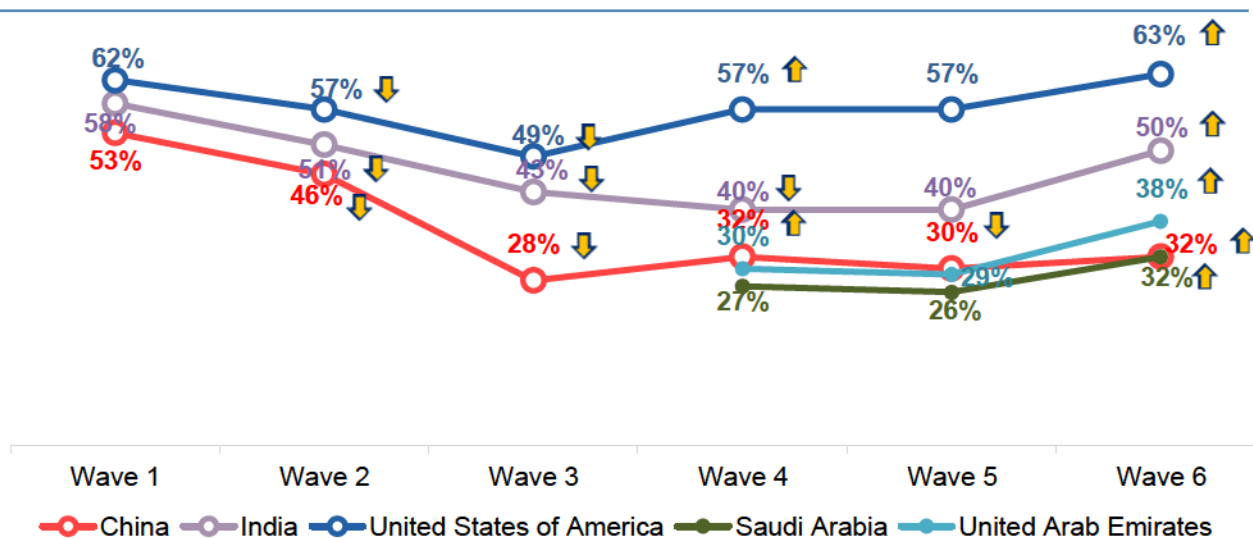
TP2. To what extent would you support or oppose the UK establishing a free trade agreement with each of the following countries?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave = 4009, Wave 5 = 2989, Wave 6 = 3058).
Statistical significance arrows represent significant differences when compared to results in the previous wave.

5.1.3 While levels of support for FTAs vary by country, there is a high degree of consistency in the demographic groups who support or oppose them across all countries.

Switzerland

Support for securing a free trade agreement with Switzerland drew the highest levels of support (64%) at wave 6, and the highest for any country since the study began.

The following groups were more likely to support this:

- men (70%)

- those aged 55+ (74%)

- those in the South East (72%)

- those educated to degree level or above (76%)

- white respondents (66%)

- those in SEG classifications AB (76%)

- those in the least deprived IMD quartile (73%)

- those with a household income over £60,000 (73%)

Conversely, the following groups were more likely to be opposed to an FTA with Switzerland:

- those aged 16 to 34 (9%)

- respondents living in London (9%)

- ethnic minority respondents (9%)

- those with a household income of less than £10,000 (8%)

- those in the most deprived IMD quartile (7%)

USA

The following groups were significantly more likely to say they support establishing an FTA with the USA:

- those in the least deprived IMD quartile (73%)

- those aged 55+ (73%)

- those in SEG classifications AB (72%)

- those with a household income over £60,000 (72%)

- those in the South East (68%)

- those educated to degree level or above (68%)

- men (67%)

- white respondents (65%)

Conversely, the following groups are more likely to be opposed to an FTA with the USA:

- those aged 16 to 34 (17%)

- respondents living in London (17%)

- ethnic minority respondents (16%)

- those educated to degree level or above (15%)

Where members of one group are both more likely to support and to oppose an FTA, this indicates a polarisation of opinion among that group, reducing the proportion who say "don't know" or "neither nor" compared to other groups.

Indonesia

The following groups were more likely to support an FTA with Indonesia:

- men (52%)

- those aged 55+ (51%)

- those in the East of England (55%)

- those educated to degree level or above (52%) or to non-degree level (49%)

- those in SEG classifications AB (55%)

- those in the least deprived IMD quartile (54%)

- those with a household income over £60,000 (55%)

Conversely, the following groups were more likely to be opposed to an FTA with Indonesia:

- those in the North East (17%)

- those educated to degree level or above (13%)

- those aged 16 to 34 (12%)

- those in SEG classifications AB (12%)

India

The following groups were more likely to support an FTA with India:

- men (56%)

- those aged 55+ (57%)

- those in the East of England (58%) and the South East (56%)

- those educated to degree level or above (59%)

- those in SEG classifications AB (60%)

- those in the least deprived IMD quartile (58%)

- those with a household income over £60,000 (61%)

Opposition to an FTA with India was largely consistent by sub-group, with the exception that those educated to degree level or above were more likely than average to be opposed (17%)

South Korea

The following groups were more likely to support an FTA with South Korea:

- those educated to degree level or above (63%)

- those in SEG classifications AB (63%)

- men (61%)

- ethnic minority respondents (57%)

- those aged 55+ (53%)

- those in London (56%) and the South East (54%)

Conversely, the following groups were more likely to be opposed to an FTA with Indonesia:

- women (18%)

- white respondents (15%)

Turkey

The following groups were more likely to support an FTA with Turkey:

- ethnic minority respondents (50%)

- men (46%)

- those in SEG classifications AB (45%)

- those educated to degree level or above (43%) or to non-degree level (42%)

Conversely, the following groups were more likely to be opposed to an FTA with Turkey:

- those in Scotland (25%) and Northern Ireland (22%)

- those educated to degree level or above (23%)

- those in SEG classifications AB (23%)

- white respondents (18%)

Saudi Arabia

The following groups were more likely to support an FTA with Saudi Arabia:

- men (39%)

- those in the West Midlands (38%)

- those educated to non-degree level (34%)

- ethnic minority respondents (39%)

Conversely, the following groups were more likely to be opposed to an FTA with Saudi Arabia:

- those educated to degree level or above (44%)

- those in SEG classifications AB (39%)

- those in London (36%)

- those in the least deprived IMD quartile (33%)

United Arab Emirates

The following groups were more likely to support an FTA with the UAE:

- those in the East of England (47%)
- those in SEG classifications AB (46%)
- men (45%)
- ethnic minority respondents (45%)
- those educated to degree level or above (41%)

Conversely, the following groups were more likely to be opposed to an FTA with Indonesia:

- those educated to degree level or above (33%)
- those in SEG classifications AB (30%)
- those in London (29%)

China

The following groups were significantly more likely than average to support the UK establishing an FTA with China:

- men (35%)
- those aged 16 to 34 (37%)
- ethnic minority respondents (44%)
- those in SEG classifications AB (36%)

Conversely, the following groups were more likely to be opposed to an FTA with China:

- those educated to degree level or above (44%)
- those aged 55 or over (43%)
- those in the least deprived IMD quartile (39%)
- those in the South East (39%)
- those in SEG classifications AB (36%)
- white respondents (36%)

5.2   Support for enhancing existing free trade agreements

5.2.1 There continues to be particularly high levels of support for enhancing the existing trade deal with Canada.

Respondents were shown 4 countries with which the UK already has trade agreements in place. They were asked the extent to which they would support or oppose enhancing the existing FTAs with these countries. For the first time at wave 6, this included Israel.

As **Table 4: Support and opposition to enhancing existing free trade agreements**Table 5 shows, support for enhancing the existing trade deal with Canada was high, with 7 in 10 (71%) respondents in support and just 5% saying that they were opposed. This exceeds the level of support for FTAs with other countries generally (67% supported).

Around 3 in 5 (57%) were supportive when asked about Singapore, half (52%) when asked about Mexico, and 2 in 5 (42%) when asked about Israel.

Table 4: Support and opposition to enhancing existing free trade agreements

	All countries asked about	Canada	Singapore	Mexico	Israel
Strongly support	37%	42%	26%	19%	17%
Somewhat support	29%	29%	31%	33%	25%
Neither	18%	15%	24%	28%	28%
Somewhat oppose	3%	3%	5%	5%	9%
Strongly oppose	1%	2%	2%	3%	8%
Don't know	11%	10%	12%	12%	12%
Summary: Support	**67%**	**71%**	**57%**	**52%**	**42%**
Summary: Oppose	**4%**	**5%**	**8%**	**8%**	**17%**
NET score	**+62%**	**+66%**	**+49%**	**+44%**	**+25%**

FT4. In general, would you say that you support or oppose the UK establishing free trade agreements with countries outside the European Union?
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?
Unweighted base size: all respondents (3058)

5.2.2 Support for enhancing existing trade deals with Canada, Singapore and Mexico has increased to the highest levels so far.

Support for enhancing existing free trade deals with Canada, Singapore and Mexico increased significantly following a dip at wave 5 (see Figure 27).

Support has increased by 8 percentage points to 71% for Canada, by 11 percentage points to 57% for Singapore, and by 13 percentage points to 52% for Mexico.

Figure 27: Changes in support for enhancing existing free trade deals with a selection of countries
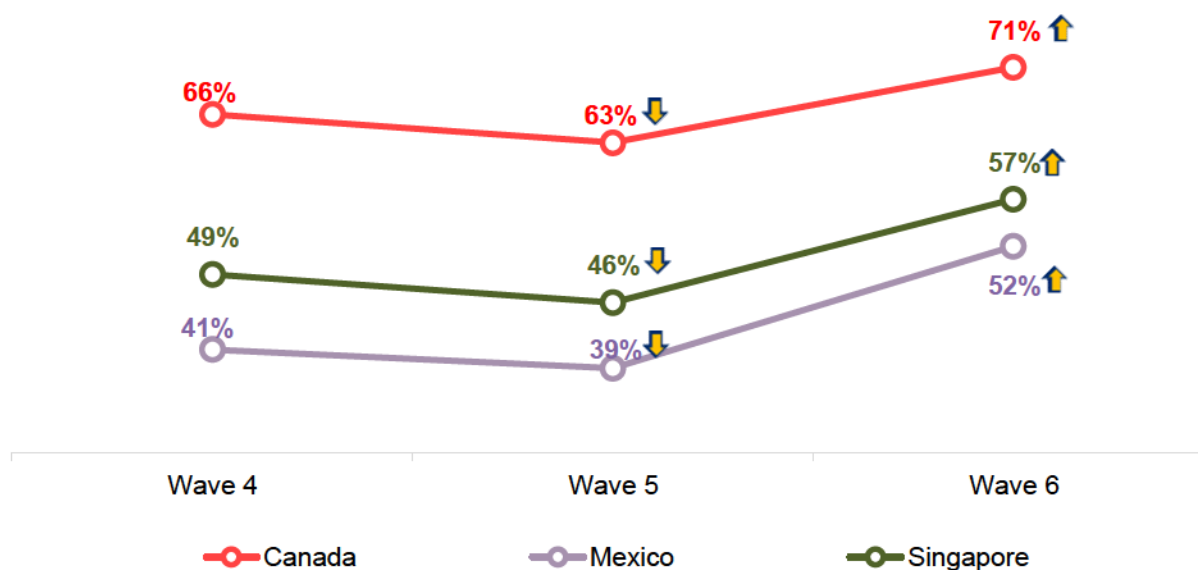
TP2i. The UK has trade agreements with some countries already. To what extent would you support or oppose the UK enhancing existing free trade agreements with the following countries? Asked from Wave 4. Unweighted base sizes: all respondents (Wave 4 = 4009, Wave 5 = 2989, Wave 6 = 3058). Statistical significance arrows represent significant differences when compared to results in the wave prior.

In each instance, men and those in SEG classification AB were significantly more likely than average to support enhancing existing trade agreements with each country. Although women and those in other SEG classifications were no more likely to oppose this, but rather more likely to offer neutral or 'don't know' responses. In each instance, support increased with age, and opposition decreased with age.

There were no differences by ethnicity, with the exception that White respondents were more likely than average to support enhancing existing trading agreements with Canada (72%) and ethnic minority respondents were less likely than average to do so. Again, this was a result of higher levels of neutral and 'don't know' responses rather than higher levels of opposition.

On a regional basis, support was particularly high for enhancing existing trade agreements with Canada in the South West (78%) and the South East (76%), and with Singapore in the South East and East of England (both 63%), and with Israel in the South East (48%).

5.3 Trade agreement priorities

5.3.1 The public's top considerations for trade agreements with non-EU countries were protecting existing jobs in the UK and creating new ones, protecting key industries in the UK such as agriculture, manufacturing and the NHS, and maintaining current UK food standards.

Respondents were asked to think about what considerations the UK Government should give priority to when negotiating free trade agreements with non-EU countries generally. They were specifically asked about the USA, Israel, Turkey, South Korea and Switzerland.

At wave 6, all respondents were shown an option for other countries generally, and each respondent was then asked about two of the five specific countries.

For each of the countries, respondents could select up to 5 considerations they saw as the highest priority from a prompted list. The top 3 most frequently selected considerations for each country are presented in Figure 28.

The top three most frequently selected considerations for all countries asked about, and each of the individual countries were:

- protecting existing jobs in the UK and creating new ones

- protecting key industries in the UK such as agriculture, manufacturing and the NHS

- maintaining current UK food standards

All respondents were also asked what considerations they thought the UK government should be given the least priority to when negotiating free trade agreements. Half (51%) mentioned building the cultural influence of the UK, a third (36%) mentioned sharing knowledge and innovations, and a quarter mentioned growing trade with lower-income nations, supporting jobs across the globe (27%), reducing the likelihood of conflict (26%), and protecting human rights and equality in other countries (24%).

Figures 29 to 34 show the full results for all countries asked about overall, and for each country.

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Figure 27: Top 3 priorities when negotiating free trade agreements

Non-EU countries	Switzerland	South Korea	Turkey	Israel	USA
Protecting key industries (46%)	Protecting existing jobs in the UK overall and creating new ones (40%)	Protecting existing jobs in the UK overall and creating new ones (38%)	Maintaining current UK food standards (42%)	Maintaining current UK food standards (36%)	Protecting key industries (43%)
Protecting existing jobs in the UK overall and creating new ones (45%)	Protecting key industries (38%)	Protecting key industries (38%)	Protecting existing jobs in the UK overall and creating new ones (40%)	Protecting existing jobs in the UK overall and creating new ones (35%)	Maintaining current UK food standards (42%)
Maintaining current UK food standards (42%)	Maintaining current UK food standards / making the cost of goods and services cheaper, growing trade with this country supporting jobs and growth (all 33%)	Maintaining current UK food standards (33%)	Protecting key industries (37%)/ Protecting human rights and equality in this country (36%)	Protecting key industries (35%)	Maintaining current UK food standards (40%)

TP2e. Please select up to five considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with the following countries? Base: Each respondent was shown non-EU countries plus an additional two countries – base for each country: non-EU countries (3058), Switzerland (1220), South Korea (1187), Turkey (1226), Israel (1229), USA (1254)

Figure 28: Considerations to be given the highest priority when negotiating free trade agreements with the non-EU countries

Highest priority

Consideration	Percentage
Protecting key industries in the UK e.g agriculture, manufacturing and the NHS	46%
Protecting existing jobs in the UK and creating new ones	45%
Maintaining current UK food standards	42%
Making the cost of goods and services cheaper	36%
Maintaining product and environmental standards in the UK	33%
Ensuring the benefits of trade in creating jobs and higher wages in every region of the UK	32%
Increasing UK goods and services exports	31%
Protecting human rights and equality in other countries (for example, protecting equality based…	30%
Maintaining animal welfare standards in the UK	30%
Reducing the likelihood of conflict	23%
Promoting investment in the UK and partner countries	22%
Investment in environmentally friendly products and services	22%
Growing trade with lower income nations, supporting jobs and growth across the globe	16%
Sharing knowledge and innovations	13%
Building the cultural influence of the UK	10%

TP2e. Please select up to five considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with non-EU countries? Base: All respondents: (3058)

Figure 29: Considerations to be given the highest priority when negotiating free trade agreements with Switzerland

Switzerland

Consideration	Percentage
Protecting existing jobs in the UK and creating new ones	40%
Protecting key industries in the UK e.g agriculture, manufacturing and the NHS	38%
Maintaining current UK food standards	33%
Making the cost of goods and services cheaper	33%
Growing trade with this country, supporting jobs and growth	33%
Increasing UK goods and services exports to this country	30%
Promoting investment in this country and the UK	30%
Ensuring the benefits of trade with this nation are in every region of the UK	27%
Maintaining product and environmental standards in the UK	26%
Sharing knowledge and innovations with this country	24%
Maintaining animal welfare standards in the UK	23%
Protecting human rights and equality in this country (for example, protecting equality based on…	20%
Investment in environmentally friendly products and services	20%
Building the cultural influence of the UK	13%
Reducing the likelihood of conflict with this country	11%

TP2c. Please select up to five considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with Switzerland? Base: Each respondent was shown 2 countries – base: (1220)

Figure 30: Considerations to be given the highest priority when negotiating free trade agreements with South Korea

South Korea

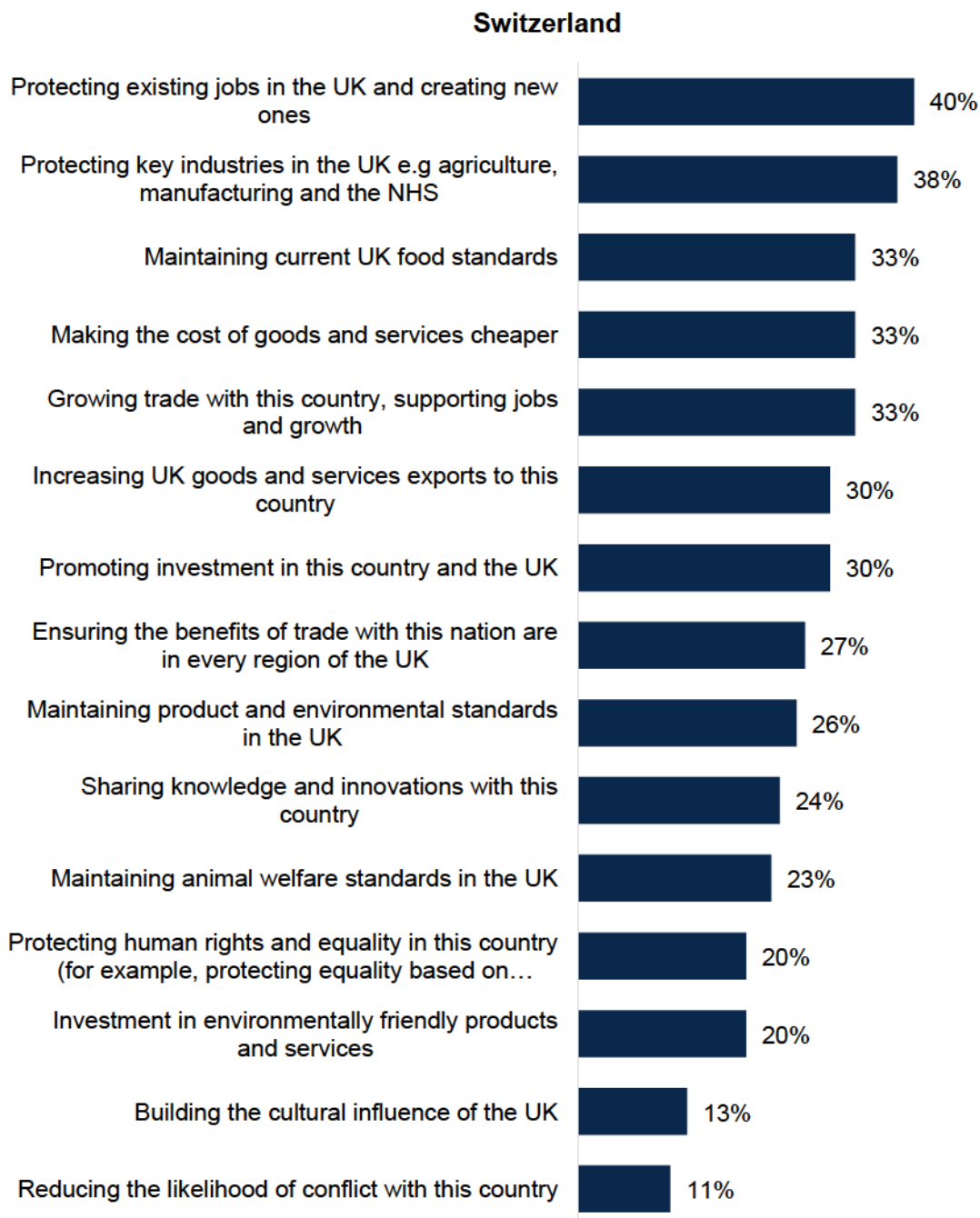| Consideration	%
Protecting existing jobs in the UK and creating new ones	38%
Protecting key industries in the UK e.g agriculture, manufacturing and the NHS	38%
Maintaining current UK food standards	33%
Maintaining product and environmental standards in the UK	30%
Growing trade with this country, supporting jobs and growth	29%
Making the cost of goods and services cheaper	28%
Increasing UK goods and services exports to this country	27%
Protecting human rights and equality in this country (for example, protecting equality based on…	27%
Maintaining animal welfare standards in the UK	26%
Ensuring the benefits of trade with this nation are in every region of the UK	26%
Promoting investment in this country and the UK	24%
Reducing the likelihood of conflict with this country	20%
Investment in environmentally friendly products and services	20%
Sharing knowledge and innovations with this country	18%
Building the cultural influence of the UK	14%

TP2c. Please select up to five considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with South Korea? Base: Each respondent was shown 2 countries – base: (1187)

Figure 31: Considerations to be given the highest priority when negotiating free trade agreements with Turkey

Turkey

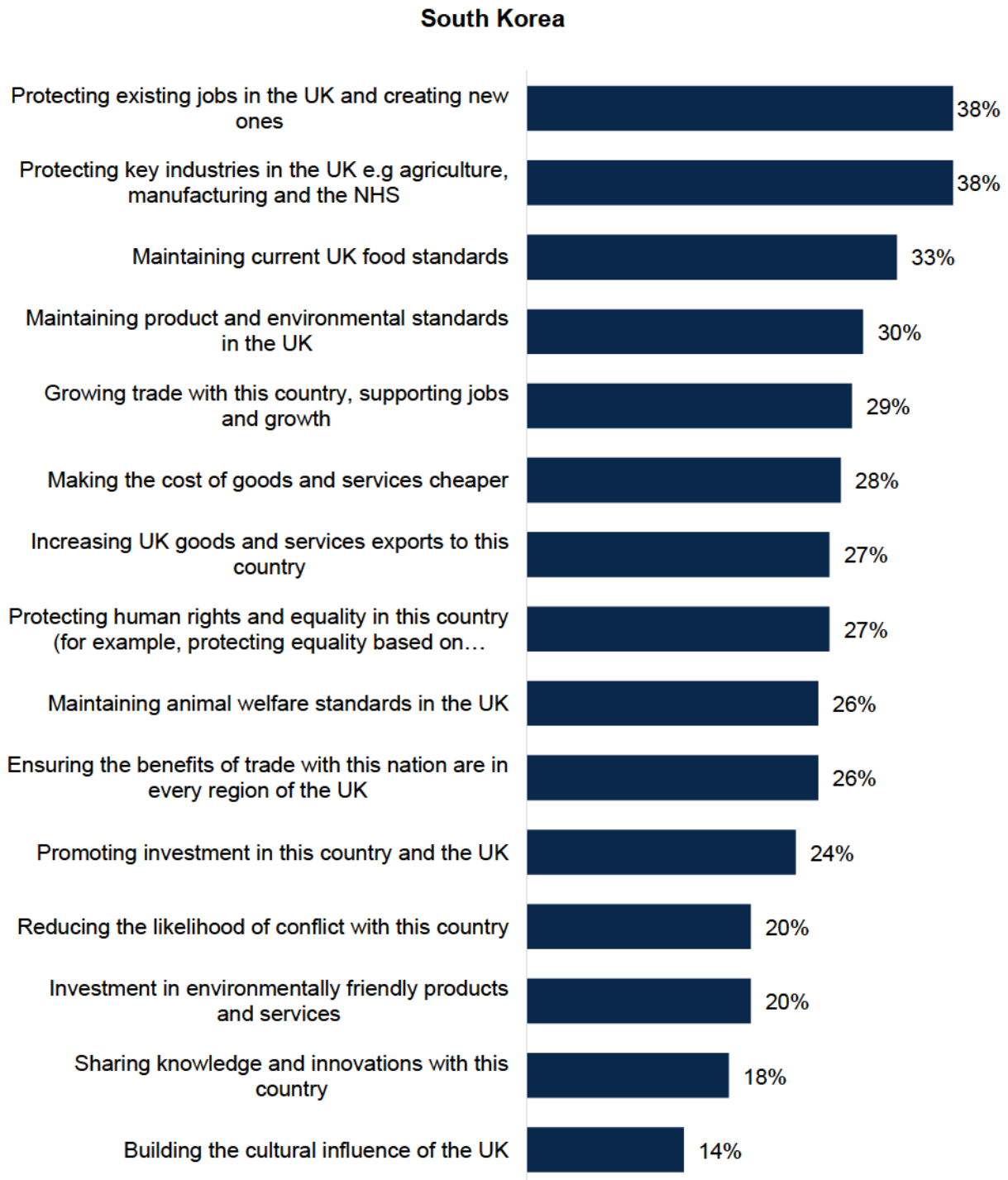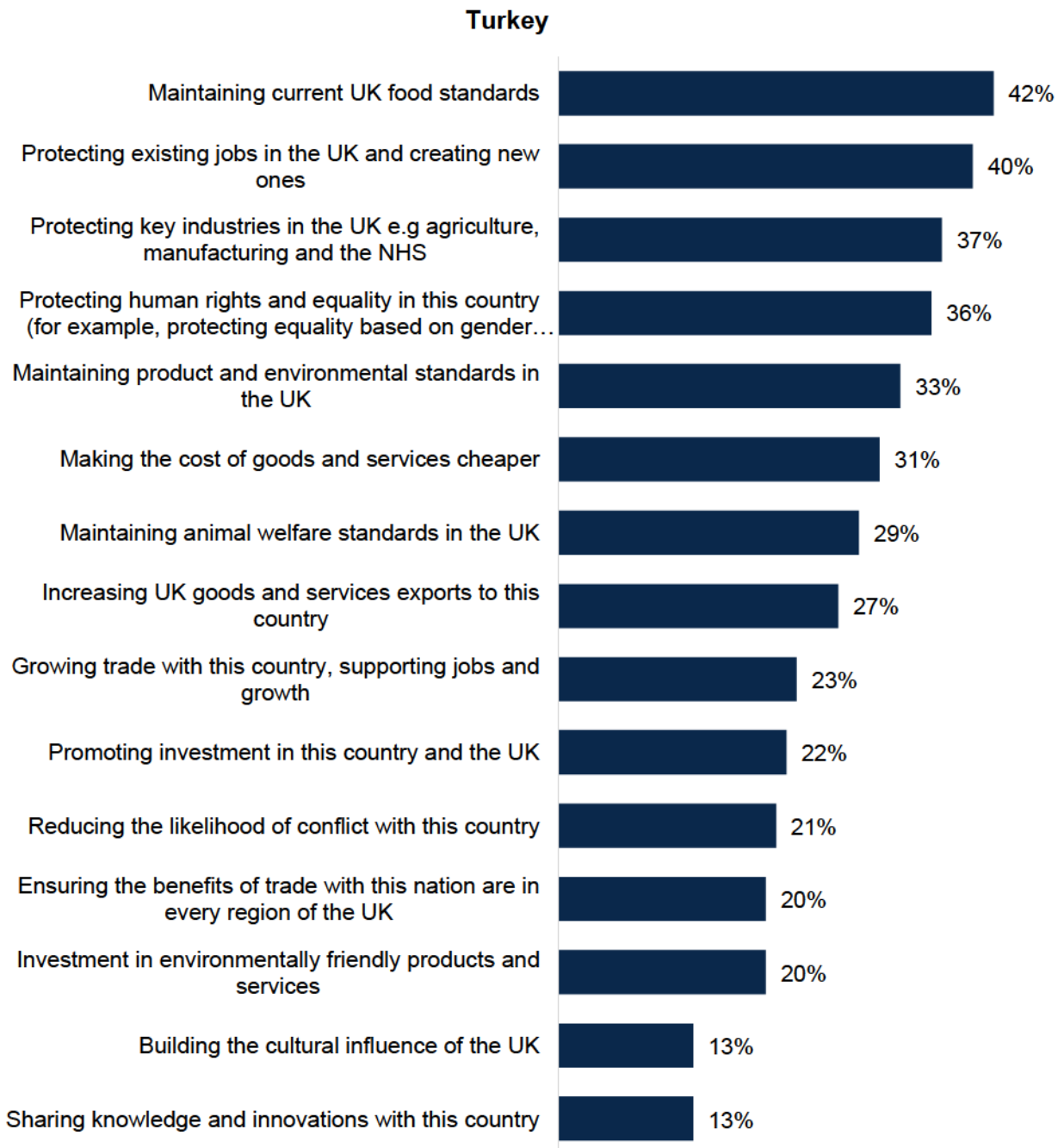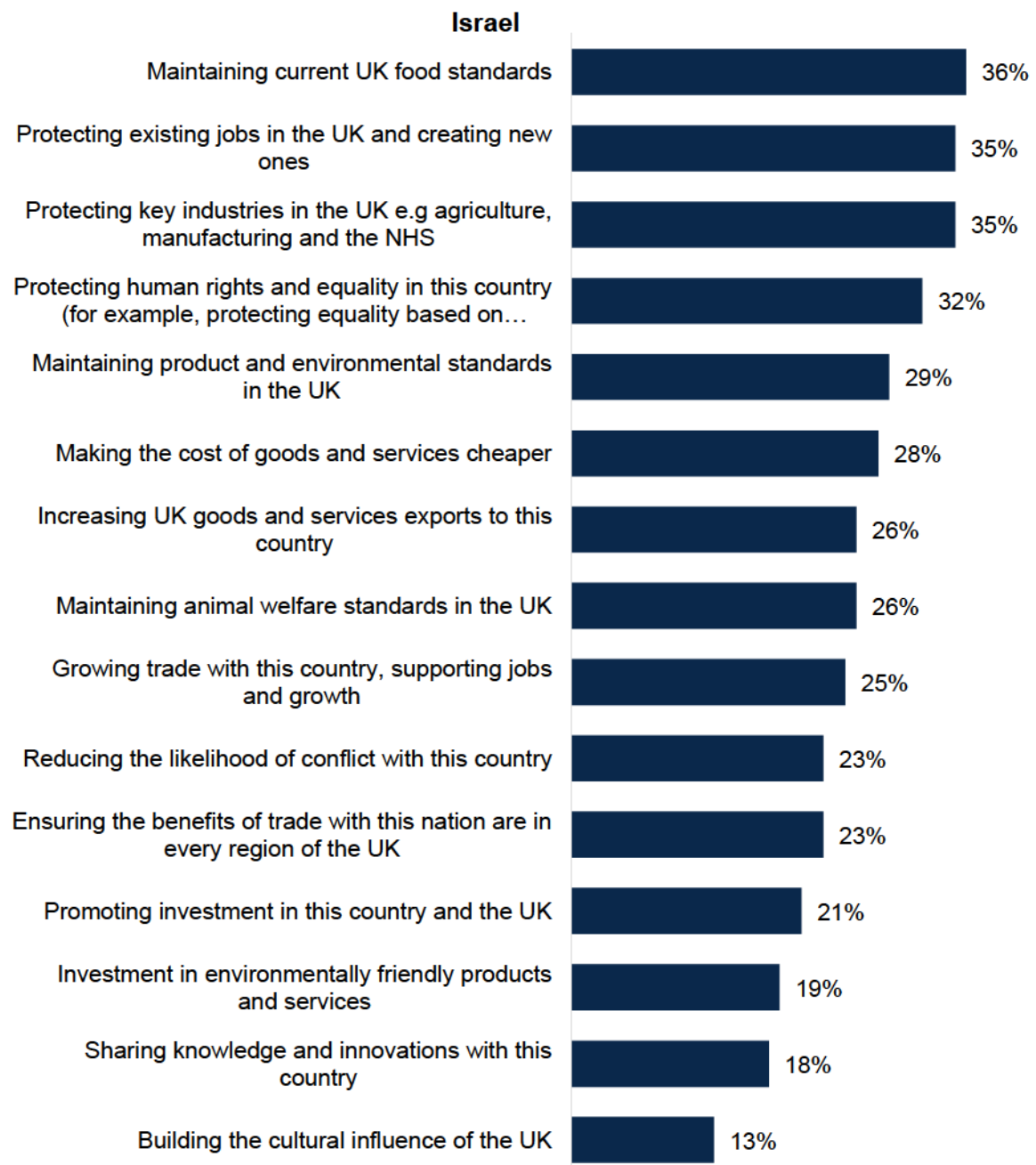| Consideration	%
Maintaining current UK food standards	42%
Protecting existing jobs in the UK and creating new ones	40%
Protecting key industries in the UK e.g agriculture, manufacturing and the NHS	37%
Protecting human rights and equality in this country (for example, protecting equality based on gender…	36%
Maintaining product and environmental standards in the UK	33%
Making the cost of goods and services cheaper	31%
Maintaining animal welfare standards in the UK	29%
Increasing UK goods and services exports to this country	27%
Growing trade with this country, supporting jobs and growth	23%
Promoting investment in this country and the UK	22%
Reducing the likelihood of conflict with this country	21%
Ensuring the benefits of trade with this nation are in every region of the UK	20%
Investment in environmentally friendly products and services	20%
Building the cultural influence of the UK	13%
Sharing knowledge and innovations with this country	13%

TP2c. Please select up to five considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with Turkey? Base: Each respondent was shown 2 countries – base: (1226)

Figure 32: Considerations to be given the highest priority when negotiating free trade agreements with Israel

Israel

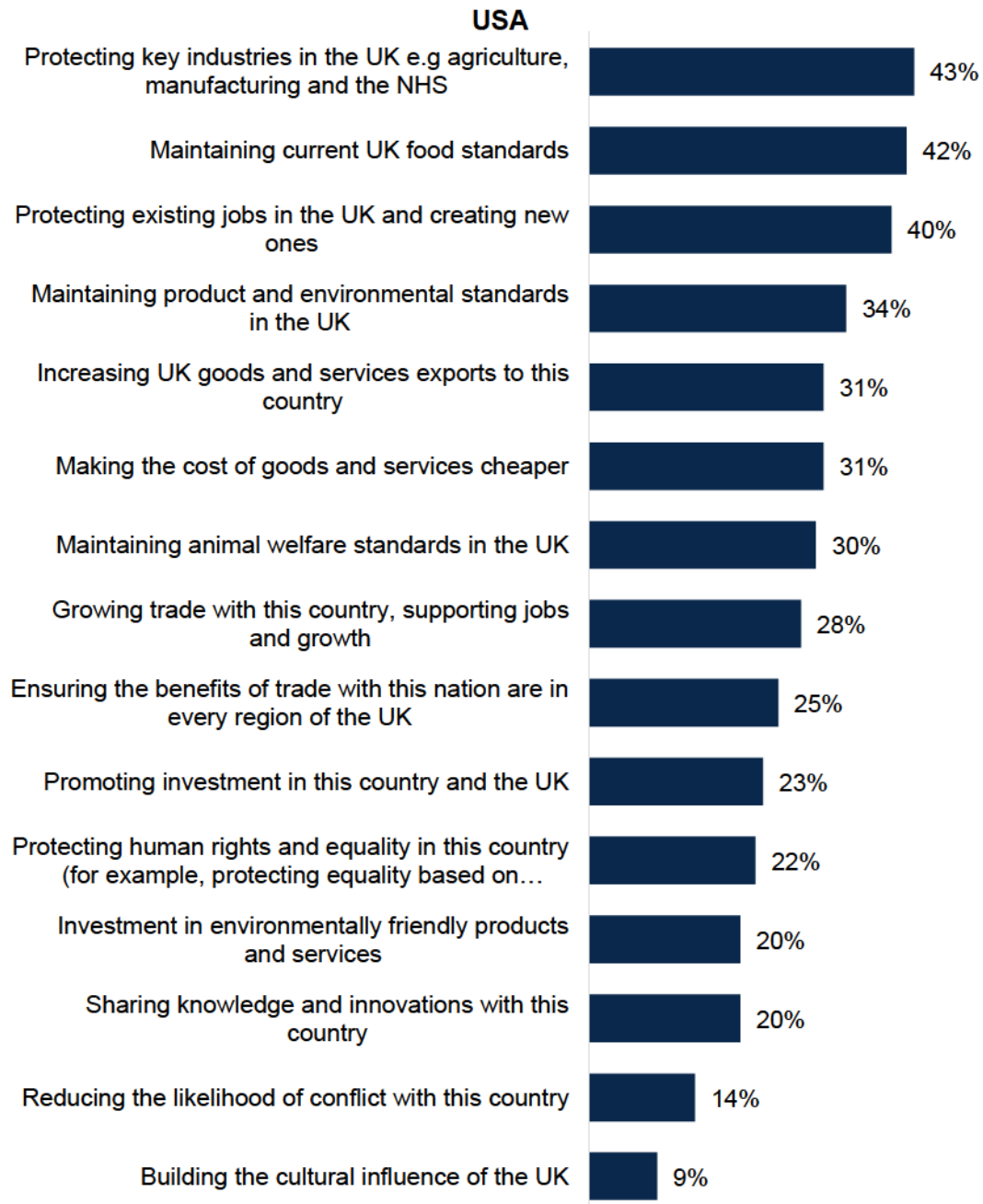| Consideration	%
Maintaining current UK food standards	36%
Protecting existing jobs in the UK and creating new ones	35%
Protecting key industries in the UK e.g agriculture, manufacturing and the NHS	35%
Protecting human rights and equality in this country (for example, protecting equality based on…	32%
Maintaining product and environmental standards in the UK	29%
Making the cost of goods and services cheaper	28%
Increasing UK goods and services exports to this country	26%
Maintaining animal welfare standards in the UK	26%
Growing trade with this country, supporting jobs and growth	25%
Reducing the likelihood of conflict with this country	23%
Ensuring the benefits of trade with this nation are in every region of the UK	23%
Promoting investment in this country and the UK	21%
Investment in environmentally friendly products and services	19%
Sharing knowledge and innovations with this country	18%
Building the cultural influence of the UK	13%

TP2c. Please select up to five considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with Israel? Base: Each respondent was shown 2 countries – base: (1229)

Figure 33: Considerations to be given the highest priority when negotiating free trade agreements with the USA

USA

Consideration	%
Protecting key industries in the UK e.g agriculture, manufacturing and the NHS	43%
Maintaining current UK food standards	42%
Protecting existing jobs in the UK and creating new ones	40%
Maintaining product and environmental standards in the UK	34%
Increasing UK goods and services exports to this country	31%
Making the cost of goods and services cheaper	31%
Maintaining animal welfare standards in the UK	30%
Growing trade with this country, supporting jobs and growth	28%
Ensuring the benefits of trade with this nation are in every region of the UK	25%
Promoting investment in this country and the UK	23%
Protecting human rights and equality in this country (for example, protecting equality based on…	22%
Investment in environmentally friendly products and services	20%
Sharing knowledge and innovations with this country	20%
Reducing the likelihood of conflict with this country	14%
Building the cultural influence of the UK	9%

TP2c. Please select up to five considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with the USA? Base: Each respondent was shown 2 countries – base: (1254)

6 Appendix

6.1 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	**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**

6.2   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.

6.3   Statistical outputs

6.3.1   Regression on factors driving support for the UK establishing free trade agreements with other countries

Independent variable	Relative Importance Score
Economic optimism (more optimistic about the economy)	22%
Education (higher educational attainment)	17%
Gender (male)	16%
Age (older age groups[26])	14%
Income (higher household incomes)	8%
IMD (live in less deprived areas)	6%

Overall R-Square value of 10%.

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[26] China reverses that trend seen generally; all else being equal, younger people are more supportive of a deal with China than older respondents.

7   Statement of terms

7.1   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).

7.2   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.

7.3   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.

Department for Business and Trade

We are the UK's department for economic growth. We support businesses to invest, grow and export, creating jobs and opportunities across the country.

We are responsible for:

- Redrawing our rules to ensure businesses thrive, markets are competitive and consumers are protected.

- Securing investment from UK and international businesses.

- Advising, supporting, and promoting British businesses to grow and export.

- Opening up new markets for businesses by removing barriers and striking trade deals.

- Promoting free trade, economic security and resilient supply chains.

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