Department for
International Trade

# Public Attitudes to Trade Tracker

Wave three report

Prepared for the Department for International Trade

**Prepared by BMG Research**

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# 2 Executive summary

## 2.1 Background and Methodology

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

- fieldwork for wave three was conducted between 15 June and 23 August 2020. The first baseline wave conducted between November 2018 and January 2019, and the second wave between June and August 2019

- waves one and two of the DIT Public Attitudes to Trade Tracker (PATT) combined push-to-web invites with a face-to-face administered Computer-Assisted Self-Interviewing (CASI) approach. Due to the COVID-19 outbreak, the face-to-face CASI fieldwork element for wave three was unable to go ahead as originally planned. The push-to-web sample size was therefore increased (73% of the final sample), with online panel interviews (26% of the final sample) used to supplement the push-to-web approach. This ensured a more representative sample with more scope for sub-group analysis[1]

- given these changes to methodology, the research provider, BMG, has concluded that tracking against waves one and two can still be done credibly. However, small shifts, even if statistically significant, should be treated with additional caution and without strong emphasis

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

## 2.2 Overview of key findings

- high levels of support for free trade: There continues to be a high level of support for free trade with countries outside the European Union (EU). Continuing a pattern observed since wave one, most people are positive about the impact of increased free trade both nationally and locally. Reasons provided for this positivity included increasing opportunities and economic benefits. The results show that even respondents who display more protectionist attitudes about trade are broadly supportive of striking free trade deals with non-EU countries. An example of these attitudes would be preferring to tax imports over tariff-free trade

- there are signs that concerns are growing: Whilst at a headline level, support for striking new trade deals remains high, there are several areas where perceptions

[1] Please note that in each wave a small number of telephone interviews were also conducted due to accessibility issues. This accounts for the additional 1% of completes at wave three (total of 41)

appear to be becoming more nuanced. There is evidence in these places that concerns are growing. Although this remains a minority view, the belief that increased free trade would lead to lower wages has increased for the second consecutive wave. There has been an increase in the proportion who say free trade leads to lower prices. An increasing minority also expect the quality of goods and services to be poorer. Possibly related to this, people report seeing and hearing more in the news about how free trade could lead to declining quality and standards. Findings at various points in the survey suggest growing concerns about quality and standards, an issue that has risen in salience

- levels of support for agreements with the USA, India, and China have declined, although Australia and New Zealand remain popular: Respondents have increasingly diverging views on trade deals, depending on the trading partner in question. This phenomenon which will be at least in part explained by perceptions around quality and standards. Australia and New Zealand retain high levels of support, but there is now less support for deals with the USA, India, and China. The fall in support for a trade deal with China is particularly sizeable. It should be noted that fieldwork was conducted prior to the 2020 US Presidential Election

- concerns may not be directly related to the specifics of trade, but rather driven by economic uncertainty as a result of COVID-19: People who are more pessimistic about the UK's economic recovery following COVID-19 are likelier to think increased free trade will lead to fewer jobs and lower wages. Worsening perceptions may therefore not always be related to the specifics of trade, but rather the state of the economy and general levels of economic pessimism

- generally, the UK public lean towards more liberal attitudes on free trade: More people tend to agree with liberal free trade attitudes rather than protectionist positions. However, most do agree with a more protectionist argument when asked specifically about COVID-19. This argument was that COVID-19 necessitates a greater degree of UK self-sufficiency

## 2.3 Interest, knowledge and engagement

- self-reported knowledge levels concerning how the UK trades with countries outside the EU remain unchanged: Consistent with waves one and two, around two in three continue to feel knowledgeable about how the UK trades with countries outside the EU

- increasing levels of interest: There has been an increase in interest in how the UK trades with other countries both inside and outside the EU. However, increasing interest is not limited to trade-related issues, with interest in the UK economy, UK foreign affairs, and the UK's approach to environmental issues also increasing

- increasing "cut-through" of potentially negative stories: Analysis of open responses reveals some concerns relating to the UK's trade relationship with the USA are now receiving greater traction amongst the public. These are around the potential for lower standards and poorer quality goods

## 2.4 Support for free trade agreements and perceived impact

- support and opposition towards establishing FTAs outside of the EU has remained stable: However, whilst still a small proportion overall, there is some evidence of increasing opposition to FTAs with some countries[2]

- overall perceptions about the impact of increased free trade remain largely unchanged: There has been little change in perceptions around the national and local impact of signing free trade agreements. Whilst there have been limited changes in the overall levels of positivity, there has been a slight shift away from ‘very’ positive towards ‘fairly’ positive

- perceptions specifically around the impact on jobs of increased free trade have stabilised: The majority of respondents continue to believe that increased free trade would lead to more jobs in the UK overall and in their local area

- increases in negative perceptions around the impact of trade on wages continue: Although this remains a minority-held opinion, the belief that increased free trade would lead to lower wages has increased for the second wave sequentially

- negativity towards free trade is often a result of perceptions around declining standards/quality: Declining standards and quality are the issues cited more than any other by respondents who think free trade will have a negative impact on the UK overall

- increasing free trade with non-EU countries is popular even among the more protectionist: This finding highlights the high levels of support for free trade more generally. Most respondents who can be classified as having more protectionist attitudes still are largely supportive of free trade agreements with countries outside the EU

- concerns may not be trade-specific, but rather a product of wider economic uncertainty as a result of COVID-19: Those less optimistic about the UK’s economic recovery following COVID-19 are more likely to say they believe higher levels of free trade will lead to a decline in jobs and a decrease in wages. This highlights that shifting perceptions may not always be related to the specifics of trade, but rather will be influenced by the broader state of the economy and levels of economic pessimism

- increasing proportions think increased free trade will lead to lower priced, but also lower quality goods and services: There has been an increase in the proportion expecting there to be a decrease in the price of goods and services if free trade increases. An increasing minority would also expect the quality to be poorer

[2] This may be to some extent caused by changes to question wording. Please see the methodology section or accompanying technical report for more details. Technical report may be found online with the main report

- generally, the UK public lean towards more liberal attitudes of free trade: More people tend to agree with liberal free trade attitudes rather than protectionist positions. Most do agree with a more protectionist argument when asked specifically about COVID-19 and the notion that it has necessitated greater degrees of self-sufficiency

## 2.5 Trading partner preferences

- support for a trade deal with China has declined considerably: Support for free trade agreements with the USA, India, and China have dropped for the second wave in a row. China sees a particularly large fall in support, with more now opposed to a trade deal with China than say they support one

- increasing economic focus: Considerations such as creating new jobs in the UK and maintaining UK food standards continue to be a high priority for many. In wave two, factors such as maintaining environmental and product standards were considered more important, however wave three shows a move towards the importance of protecting UK farmers and existing UK jobs

- perceptions of declining quality: Japan continues to be seen as producing high quality goods by the largest number of respondents. However, aside from New Zealand, perceptions of quality have declined for all countries listed. This includes declines for Australia and Japan, with more sizeable drops for USA, China, and India

- Australia and New Zealand continue to be popular partners: Support for trade deals with the USA, India, and China have dropped. However, around two in three respondents continue to be supportive of a deal with Australia and New Zealand

- a consistent picture around trade considerations which should take lower priority: Irrespective of country, there continue to be high levels of consistency as to which considerations should have least priority when negotiating free trade agreements. These are promoting investment; equal rights to live and work in each country; and protecting human rights in the trade partner country

# 3 Background and methodology

## 3.1 Background, context and research objectives

The Department for International Trade (DIT) 2021 to 2022 Outcome Delivery Plan[3] sets out an ambitious set of trade and investment objectives for the year ahead focused on achieving four priority outcomes:

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

DIT over the last few years has set out to deliver an ambitious free trade agreement programme that benefits businesses and consumers in every part of the UK.

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

In September 2018, DIT commissioned the first wave of a nationally representative survey of the UK public to examine public attitudes towards trade and to understand the public's priorities regarding trade policy. Building on wave one, waves two and now three have enabled DIT to track shifts in public sentiment over time.

Fieldwork for wave three was conducted between 15 June and 23 August 2020. The first baseline wave concluded in January 2019 and the second wave finished in August 2019. Final reports for waves one and two have also been published by DIT.[4]

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[3] See: https://www.gov.uk/government/publications/department-for-international-trade-outcome-delivery-plan/dit-outcome-delivery-plan-2021-to-2022
[4] For wave one, please see: https://www.gov.uk/government/publications/public-attitudes-to-trade-tracker-wave-1
For wave two, please see: https://www.gov.uk/government/publications/public-attitudes-to-trade-tracker-patt-wave-2

## 3.2 Overview of methodology

### 3.2.1 Overview of methodological changes at wave three[5]

Readers should treat comparisons at wave three with data from waves one and two with additional caution. Caution should always be exercised when tracking survey data, but extra caution should be taken in this instance. This is due to the methodological changes that were introduced in wave three, following the COVID-19 outbreak.

Waves one and two 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 three was unable to go ahead as originally planned.

As a result, the push-to-web sample size was increased (73% of the final sample). Online panel interviews (26% of the final sample) were used to supplement the push-to-web approach. This provided a more representative sample with greater scope for sub-group analysis.[6]

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 |

### 3.2.2 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, double the number sampled at waves one and two. 2,374 respondents completed the survey, representing a response rate of 20%.

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.

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[5] For a more detailed overviews of the methodology used at wave three, please see the technical report available online

[6] Please note that in each wave a small number of telephone interviews were also conducted due to accessibility issues. This accounts for the additional 1% of completes at wave three (total of 41).

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

**Online panel interviews**

Alongside the push-to-web approach, BMG conducted 850 of the target interviews via online panel interviews (26% of the total). An online panel is defined as an online group of recruited people willing to conduct social and market research surveys in return for a small financial incentive for each survey completed. BMG Research worked with an online panel partner, Savanta, to achieve the online panel interviews.[7]

These interviews were conducted using a targeted approach based on where response rates via the push-to-web approach were lower. 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.

### 3.2.3 Analysis on impact of methodological changes

BMG Research has conducted an in-depth analysis on the impacts of the methodological changes. The analysis concluded that, considered in isolation, the impact of mode on responses was negligible. The change in mode, in and of itself, has not resulted in any major effects in terms of the way people were responding across a range of key metrics. This conclusion makes intuitive sense given that all modes used relied on a self-complete methodology. All respondents were asked to read and complete the questions themselves irrespective of the mode of contact.

Though very consistent across most key demographic variables including age; gender and region, the educational profile of the sample was affected. Analysis showed that the CASI methodology used in wave two allowed us to get closer to the actual figures for the population at large. The method was successful in getting through to more respondents with lower levels of educational attainment (see Table 2 below).

**Table 2: Education composition versus ONS targets[8]**

| Qualification level | ONS (2017 Annual Population Survey) | Wave two | Wave three |
|---|---|---|---|
| No qualifications | 9% | 10% | 5% |
| NVQ1 to 3 | 53% | 54% | 43% |
| NVQ4 or higher | 38% | 44% | 52% |

[7] For more information, please see: https://savanta.com/data-collection-analysis/
[8] For more information regarding ONS qualification level population estimates, please see: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/adhocs/009416highestqualificationsheldinagegroupsbyeconomicactivityforuk2002to2017

This resulted in the introduction of an education weight at wave three to allow for more reliable comparisons across waves. It is worth noting that the impact of this new weight had only a marginal effect, ranging between 1 and 3 percentage points. This impact tended to slightly reduce levels of support, interest and positivity with respect to free trade and free trade agreements.

Given these changes to methodology BMG has concluded that tracking against waves one and two can still be done credibly. However, small shifts, even if statistically significant, should be treated with additional caution and without strong emphasis.

### 3.2.4 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 (GOR)
- Indices of Multiple Deprivation (IMD)
- 2016 EU referendum vote
- education level[9]

All targets were ascertained using official population statistics released by the ONS and the Electoral Commission's official published 2016 Referendum results. Table 3, below, shows the combined weighted and unweighted base sizes for wave one and wave two by region.

**Table 3: Total combined completes**

| Region | Wave one: Unweighted Counts | Wave two: Unweighted Counts | Wave three: Unweighted Counts | Wave one: Weighted Counts | Wave two: Weighted Counts | Wave three: Weighted Counts |
|---|---|---|---|---|---|---|
| England | 1,819 | 1,747 | 2,410 | 2,017 | 1,973 | 2,708 |
| Scotland | 202 | 202 | 302 | 202 | 198 | 272 |
| Wales | 213 | 203 | 282 | 115 | 113 | 155 |
| Northern Ireland | 166 | 197 | 230 | 66 | 65 | 89 |
| **Total** | **2,400** | **2,349** | **3,224** | **2,400** | **2,349** | **3,224** |

[9] A new addition at wave three.

#### 3.2.5 Questionnaire design

Following considerable work developing the questionnaire in advance of wave one and two, most of the questions included in the questionnaire at wave three remained identical, with a similar order and structure of sections so as to minimise potential order effects.[10] This allows for the majority of questions to be tracked across multiple waves, to see how responses have changed over time. However, a number of additions and changes were made at wave three, including:

- new questions which examined respondents' awareness of negotiations for free trade agreements with the US and Japan
- new questions exploring respondents' recall of, and views on, topics related to trading
- a new question on views of post-COVID-19 recovery
- in some instances, while the questions remain the same, specific response options have changed to reflect emerging priorities

As with previous waves, one and two, BMG conducted a round of cognitive testing with members of the public in order to review the question wording and structure of new or substantially altered questions.[11] Upon review of themes emerging from the cognitive interviews, small textual changes were made before a final draft of the questionnaire was agreed.

#### 3.2.6 Fieldwork

Fieldwork was conducted between 10 June 2020 and 13 August 2020. A number of notable EU-exit related activities occurred both prior to and during the fieldwork period. Notable events taking place before fieldwork commencing include the 2019 UK general election (December 2019) and lockdown regulations coming into effect in England and Wales (March 2020). During the fieldwork period it was confirmed that the UK economy had gone into recession (August 2020).

Various other trade related events are worth noting, most of which took place shortly prior to fieldwork. These include:

- the government beginning trade negotiations with the EU (2 March 2020)
- the government commencing trade negotiations with the USA (5 May 2020)
- the announcement of the UK's new tariff regime (19 May 2020)
- the publication of the UK-Japan negotiating priorities (13 May 2020)

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[10] 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

[11] For more information on the cognitive testing process, please see the technical report

## 3.3 Contents and structure of report

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

1. interest, knowledge and engagement: Firstly, the report examines survey respondents' interest in the subject of trade, their knowledge of trade-related issues, and how these compare to the results observed at wave one and two. We also explore levels of engagement by exploring what trade-related news stories respondents reported seeing or hearing.

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

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

## 3.4 Presentation of results

Outlined below are a series of guidance and advice to assist when reading and interpreting the data outlined in this report:

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

Rounding: The data used in this report are rounded up or down to the nearest whole percentage. It is for this reason that, on occasion, tables or charts may add up to 99% or 101%.

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, differences identified between waves or across sub-groups are all statistically significant to 95% confidence. This means that there is only a 5% probability that the difference has occurred by chance (a commonly accepted level of probability), rather than being a ‘real’ difference.

Unless specified, all statistics are compared against the total.

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

The focus of the report is to identify where there are statistically significant differences. Where differences between waves are discussed during the commentary, these differences can all be presumed to be statistically significant unless otherwise noted.[12]

It is important to note that the online panel interviews relied on quota sampling. There are a number of potential issues with using formal statistical significance tests on quota sample data including bias and lack of known sampling probability. Therefore, it is advised that any results of statistical significance tests are used as a guide and should always be interpreted with a degree of caution.[13]

[12] Data tables can be accessed online alongside this report

[13] Further discussion on quota and probability sampling and the consequences for statistical tests is provided in the technical report

# 4 Interest, knowledge and engagement

## 4.1 Background

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

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

It should be noted that responses to questions designed to measure interest and engagement around a subject, particularly those that relate to politics, are often influenced by social desirability bias.[14] It may be considered desirable to be seen as interested or knowledgeable on topical issues and current affairs. Therefore, it is possible that respondents may overstate their interest or knowledge of such issues when responding to survey questions. Some of this effect is designed to be ameliorated by the self-completion method chosen for this survey, which may reduce the social pressure of an interviewer. The results discussed below should be treated with this cautionary note in mind.

## 4.2 Interest in trade

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

### 4.2.1 There has been an increase in interest in how the UK trades with other countries

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

A total of 75% of respondents said they felt interested in how the UK trades with countries inside the EU. The same proportion (75%) said they were interested in how the UK trades with countries outside the EU. This includes around three in ten respondents

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

who stated they are ‘very interested’ in how the UK trades with countries both inside (29%) and outside the EU (31%).

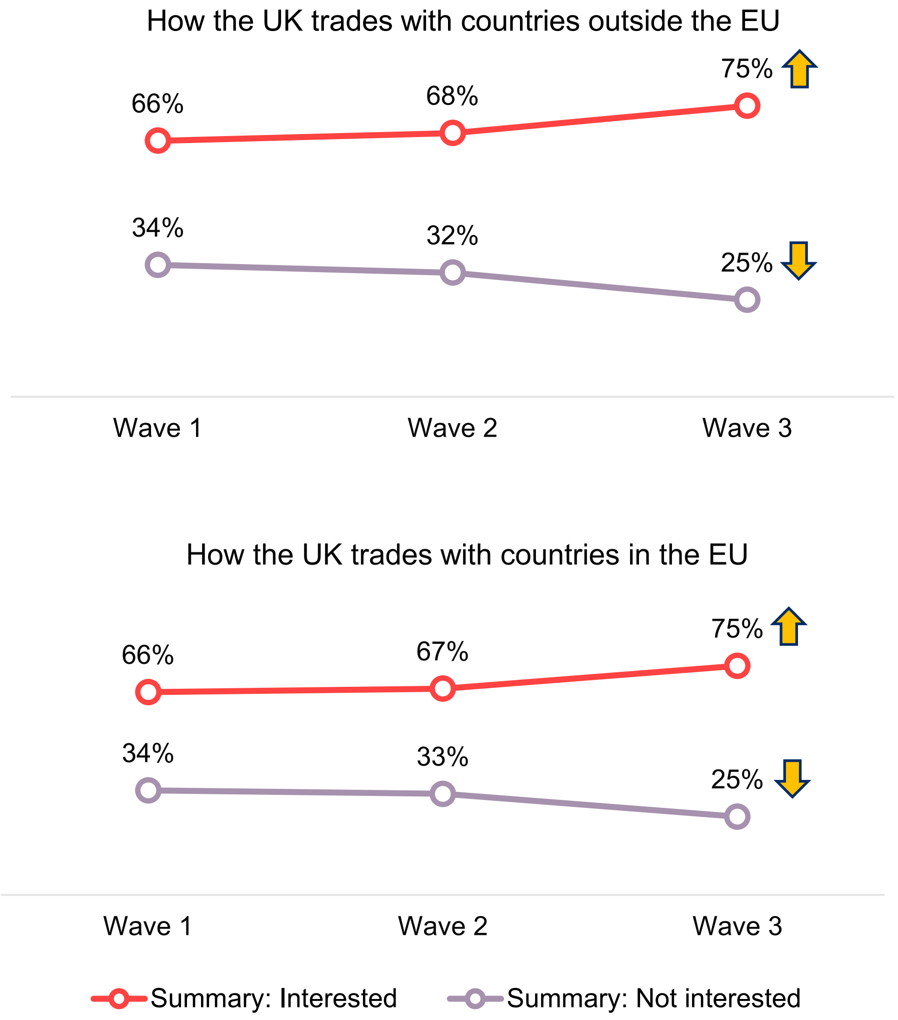
As Figure 1 illustrates, this represents a significant rise in overall levels of interest compared to the results at wave two. Interest in trade with countries outside the EU has risen by 7 percentage points, and interest with countries in the EU has increased by 8 percentage points.

It is important to note that levels of interest in a variety of other topics has also increased significantly when compared to wave two figures. As Figure 2 demonstrates, the increase for the UK economy is the largest in percentage point terms (10 percentage points). However, there has also been significant increases in interest for UK foreign affairs (7 percentage points), and the UK’s approach to environmental issues (8 percentage points).

This would suggest that interest in news related policy areas has increased across the board, rather than a spike in interest only towards trade specific topics. It is also important to stress that mode effects may play some part in the increases, though we are confident that at least part of the shift is genuine.[15]

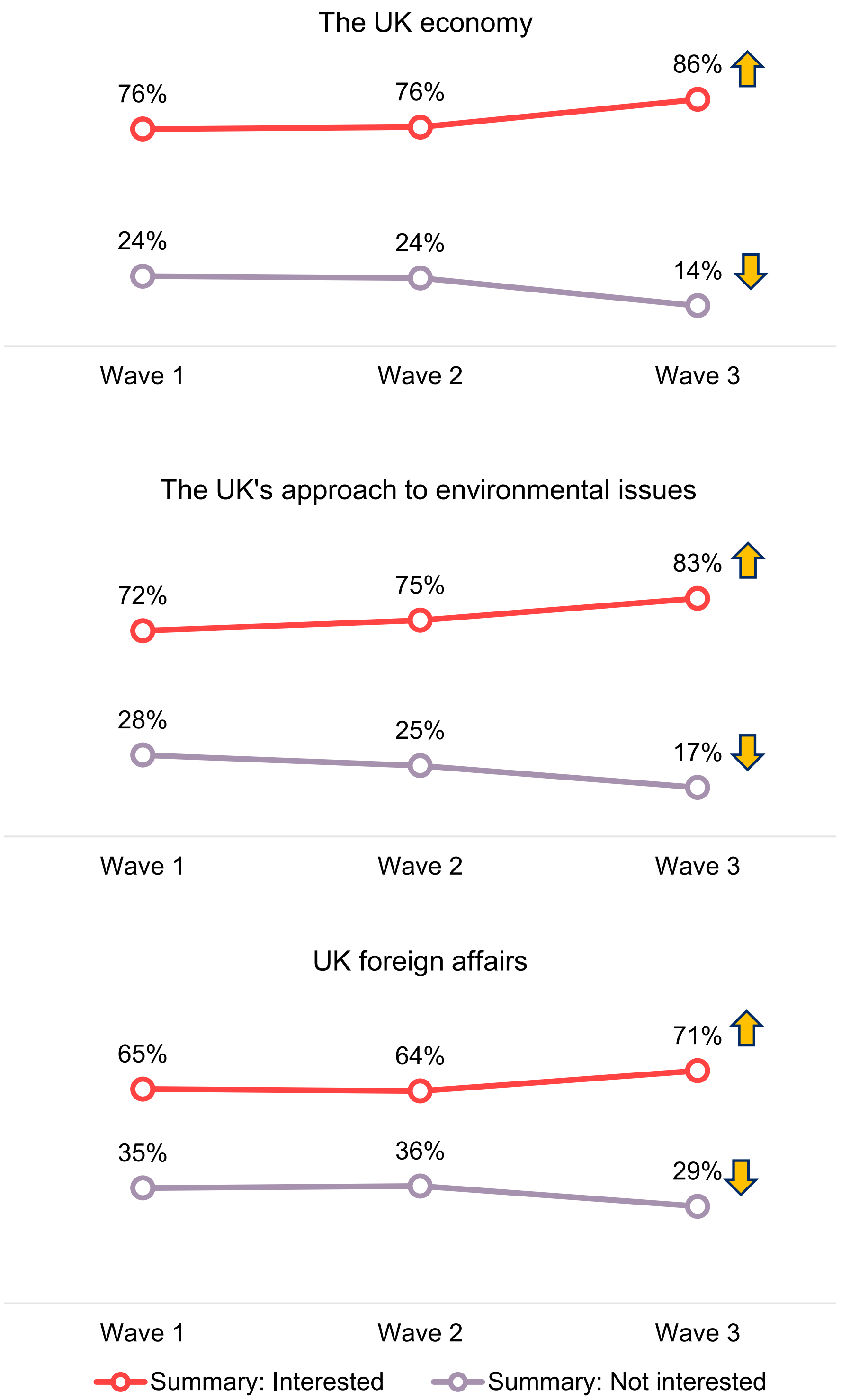
[15] Looking at tables for push-to-web elements of each wave (with original weights) we also see a statistically significant uplift. As discussed, the mode impacts will to some extent be addressed by new education weights, but we feel mode effects may be exaggerating the increases on this question by around one to three percentage points for each topic.

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




IK1: How interested would you say you are in …?
Unweighted base sizes: All respondents (Wave 1 = 2,400, Wave 2 = 2,349, Wave 3 = 3,224)
Statistical significance arrows represent significant differences when compared to results observed at wave one.

**Figure 2: Interest in other non-trade specific subjects**




IK1: How interested would you say you are in …?
Unweighted base sizes: All respondents (Wave 1 = 2,400, Wave 2 = 2,349, Wave 3 = 3,224)
Statistical significance arrows represent significant differences when compared to results observed at previous wave.

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

By analysing responses across demographic groups, consistent patterns emerge in terms of the groups more likely to report being interested in how the UK trades with countries outside the EU. Figure 3 below charts interest levels among demographic groups on the question of interest in how the UK trades with countries outside the EU.[16]

Consistent with patterns observed in wave one and two, respondents are more likely to report being interested if they:

- are in higher socio-economic grades (SEG): 89% of those in SEG classifications AB say they are either very or fairly interested. This compares to 68% in SEG DE classification[17]

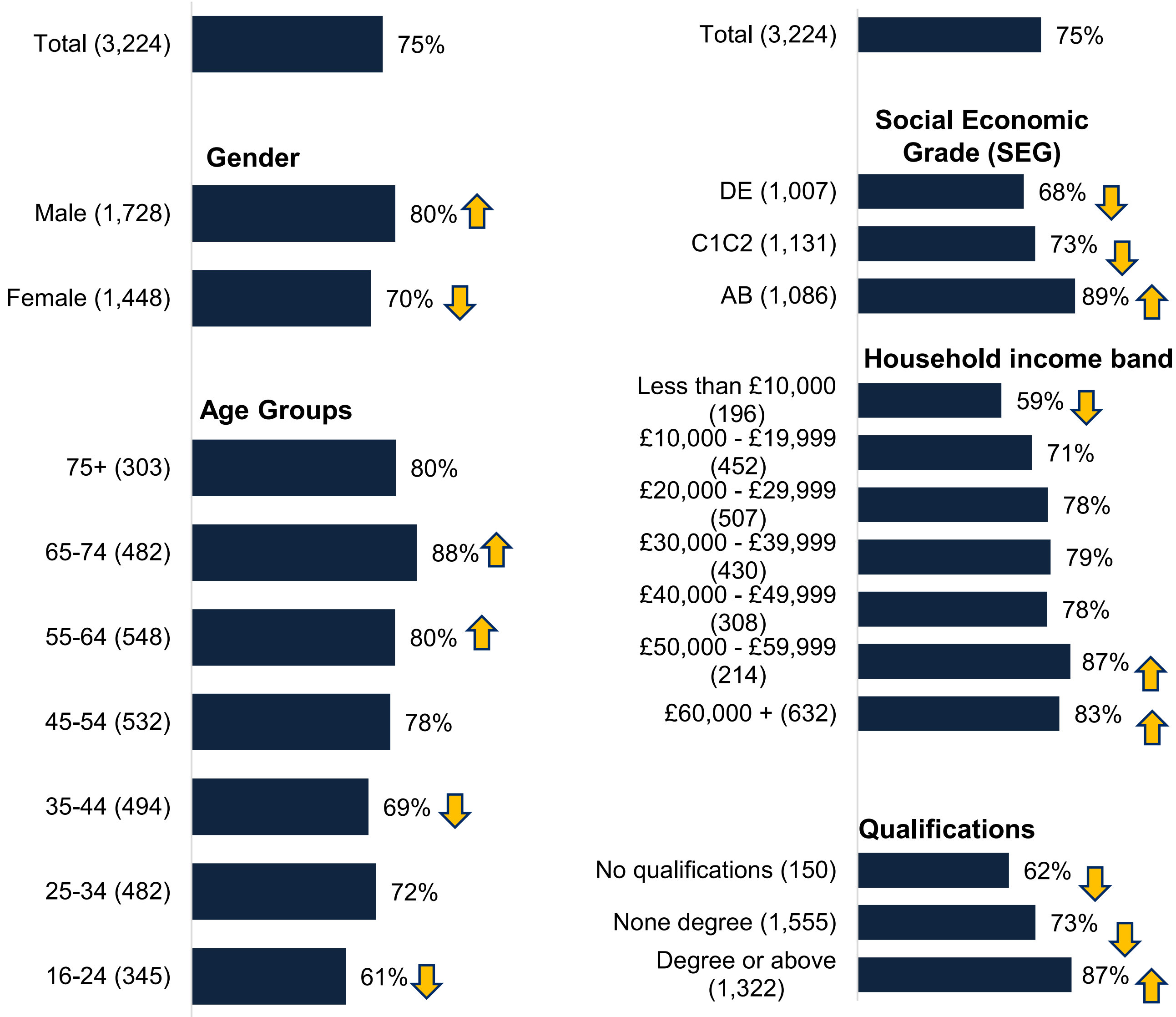
- are older: Respondents in older age groups are more likely to report being interested, with interest increasingly fairly steadily across age groups. 61% of those aged 16 to 24 say they are interested, which compares to 80% of those aged 75 and over

- have obtained degree level qualifications: 87% of those with at least an undergraduate degree level of education report being interested, which compares to 62% of those with no qualifications[18]

- are men: By a margin of 10 percentage points, men (80%) are significantly more likely than women (70%) to report being interested[19]

[16] 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.
[17] More detail on SEG classifications is provided in the appendix.
[18] It is worth noting that increases in interest levels between wave two and three have been most notable in the case of those with non-degree and degree level qualifications (9 percentage points and 14 percentage points respectively), although interest within these groups is still lower than those with a degree level education.
[19] Gender differences in interest levels with respect to political related issues is a common phenomenon within survey research. See, for example: Coffe, H. (2013) *'Women Stay Local, Men Go National and Global? Gender Differences in Political Interest'*, available at: https://link.springer.com/article/10.1007/s11199-013-0308-x

**Figure 3: Interest levels across key groups**




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

## 4.3 Knowledge of free trade

An important research objective was to explore how knowledgeable respondents felt about free trade and trade related issues.

### 4.3.1 Self-reported knowledge levels have increased with respect to how the UK trades with countries in the EU

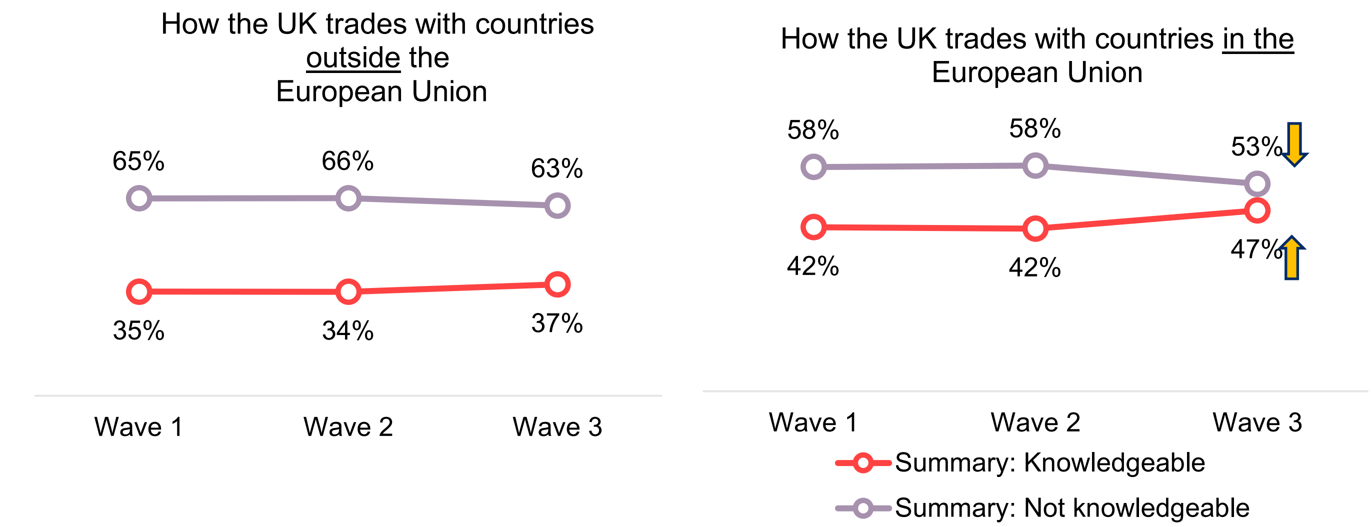
Consistent with wave one, whilst around two-thirds do indicate that they are interested in how the UK trades with other countries, a minority say they feel knowledgeable. The results therefore continue to indicate something of a “knowledge gap” between levels of interest and levels of knowledge.

Around one third (37%) of respondents said they feel knowledgeable about how the UK trades with countries outside the EU (versus 34% at wave two). Slightly more say they feel knowledgeable about how the UK trades with countries in the EU (47% versus 42% at wave two), a significant increase. This can be seen in figure 4 below.[20]

This continues to be lower than the proportion who say they feel knowledgeable about the UK’s approach to environmental issues and the UK economy (56%, and 63% respectively, see figure 5). Meanwhile, the proportion who feel knowledgeable about how the UK trades with countries in the EU is now in line with the proportion who feel knowledgeable about UK foreign affairs (46%).

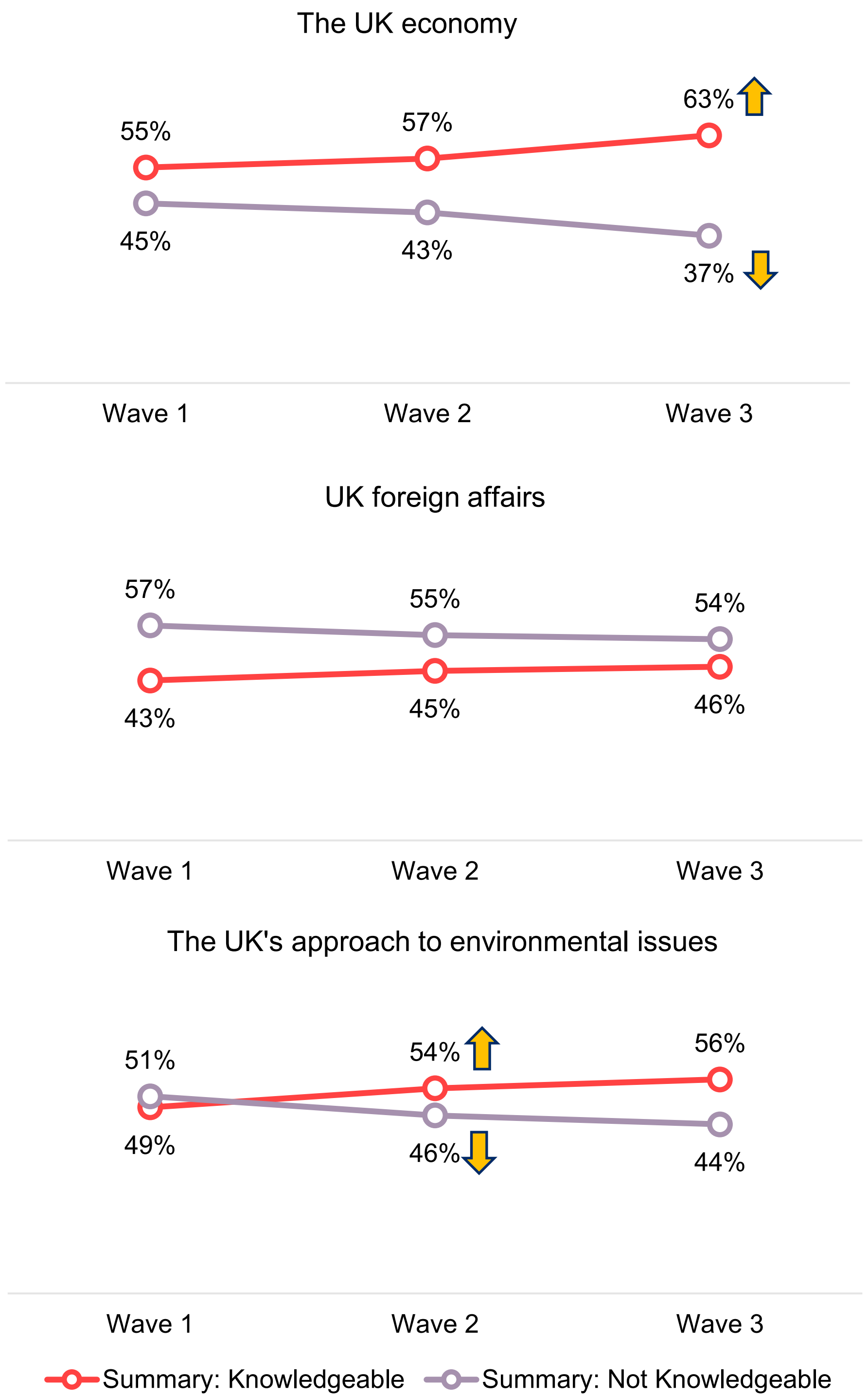
[20] Whilst we are unable to rule out the impact of mode effects entirely, the patterns observed are similar when comparing the push-to-web components of wave two and three in isolation.

**Figure 4: Self-reported knowledge of how the UK trades with other countries**




IK2. How knowledgeable would you say you currently are about ...?
Unweighted base sizes: All respondents (Wave 1 = 2,400, Wave 2 = 2,349, Wave 3 = 3.224)
Statistical significance arrows represent significant differences when compares to results observed at knowledgeable previous wave.

**Figure 5: Self-reported knowledge of how the UK trades with other countries**




IK2. How knowledgeable would you say you currently are about ...?
Unweighted base sizes: All respondents (Wave 1 = 2,400, Wave 2 = 2,349, Wave 3 = 3,224)
Statistical significance arrows represent significant differences when compares to results observed at previous wave.

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

Consistent with patterns observed in wave one and two, respondents who are older, in higher socio-economic grades, and degree educated are more likely to say they feel knowledgeable about how the UK trades with other countries. This applies both in terms of trade inside and outside the EU. Figure 6, below, charts knowledge levels among key groups on the question of how knowledgeable they feel about how the UK trades with countries outside the EU.[21]

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

- are in higher socio-economic grades (SEG): Respondents from higher socio-economic grades are more likely to report feeling knowledgeable. Close to half of those within the SEG AB classifications say they are knowledgeable (48%), significantly higher than the rate of those in SEG classifications DE (30%)

- have obtained degree level qualifications: There also continues to be a significant gap between those who have obtained a degree or above level qualifications (49%), those who have obtained non-degree qualifications (34%) and those who have no qualifications (23%)

- are men: Men (47%) are much more likely than women (28%) 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[22]

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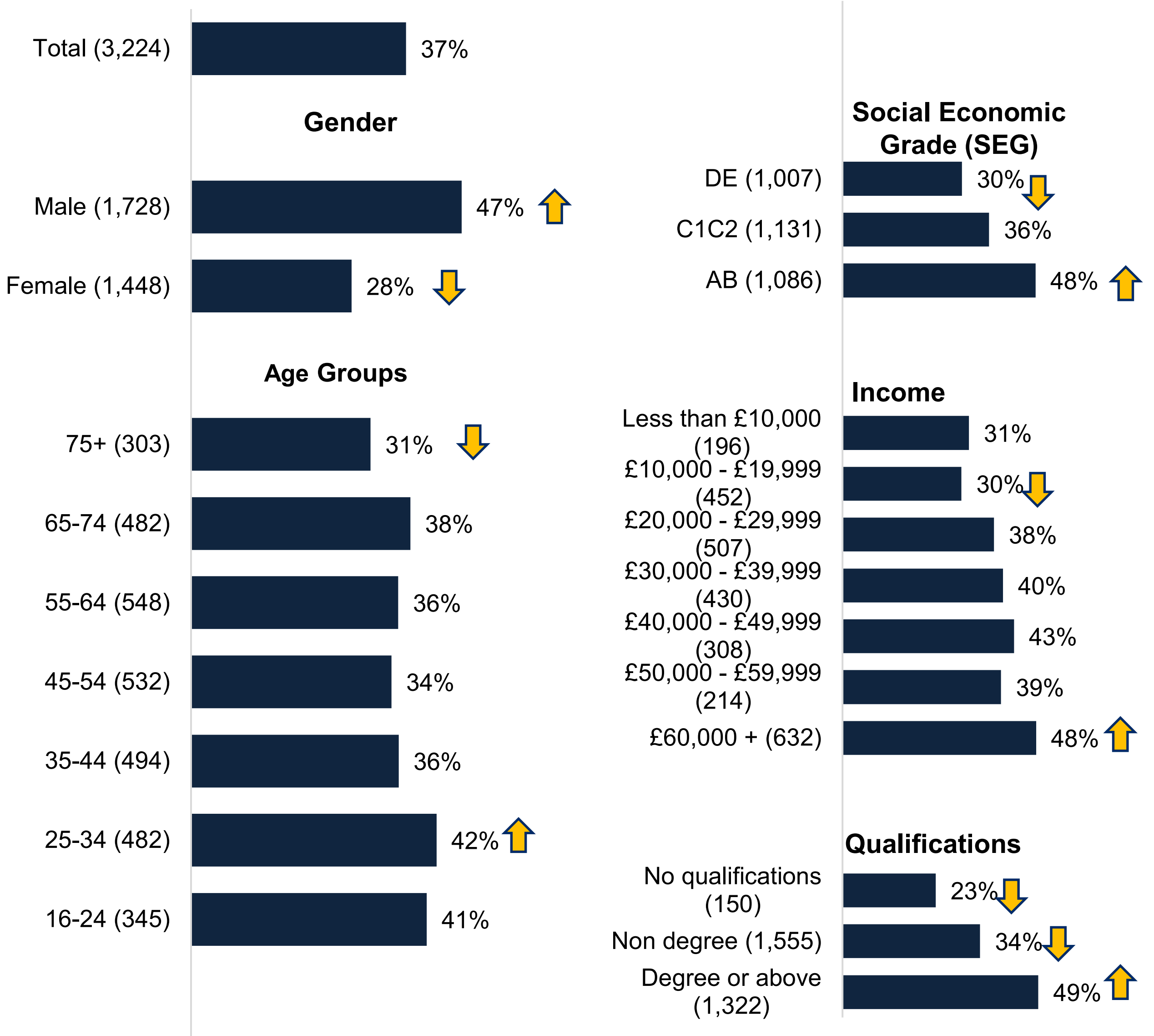
[21] Whilst not set out in full, responses to the question about how knowledgeable they feel about how the UK trades with countries *inside* the EU follow a similar pattern.

[22] 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 6: Reported knowledge levels across key groups**



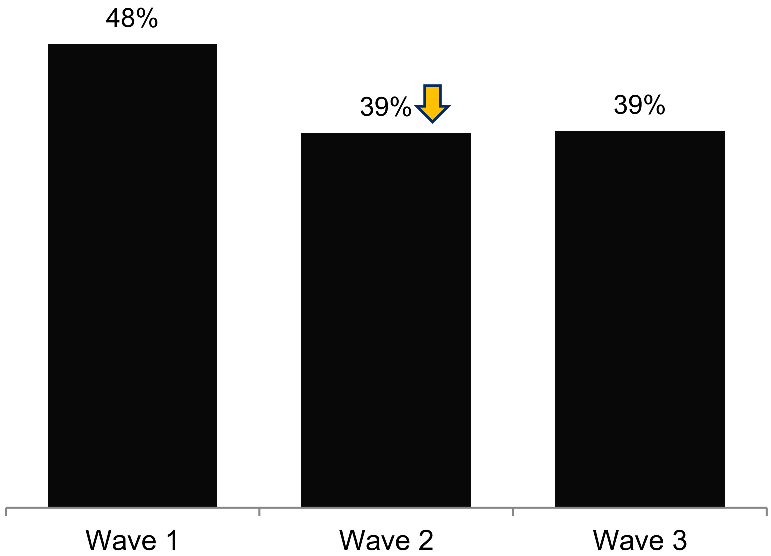

IK2. How knowledgeable would you say you currently are about…? How the UK trades with countries outside the EU
Proportions stating that they are very or fairly knowledgeable.
Unweighted base sizes provided in parenthesis.
Statistical significance arrows represent significant differences against the average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

## 4.4 Engagement

### 4.4.1 Following a drop in wave two, the percentage of respondents who reported seeing or hearing anything about how the UK trades with other countries has remained stable

Two in five respondents (39%) reported seeing, reading or hearing information about how the UK trades, or will trade, with other countries in the previous week (see Figure 7). This is in line with wave two, but remains lower than figures for wave one (48%).

**Figure 7: Proportions of respondents saying they have seen or heard something in the last week**




FT1. In the last week, have you seen or heard anything about how the UK trades with other countries, or will trade with them in the future?
% stating 'Yes'
Unweighted base sizes: All respondents (Wave 1 = 2,400, Wave 2 = 2,349, Wave 3 = 3,224)
Statistical significance arrows represent significant differences when compares to results observed at previous wave.

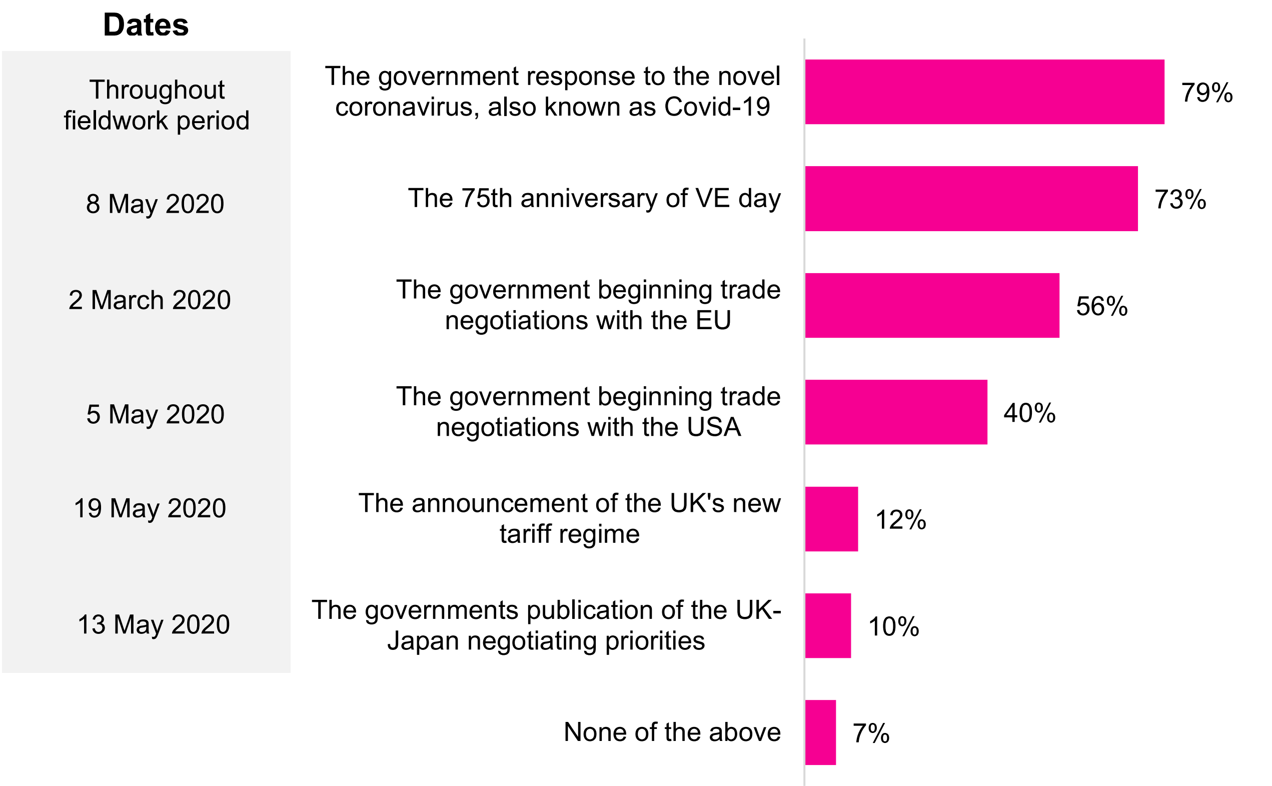
#### 4.4.2 Recall around the UK government beginning trade negotiations with the EU and the USA is higher than the publication of the UK-Japan negotiating priorities

A new question this wave, respondents were presented a list of topics and asked which they recall having seen or heard about in the previous three months. This question included both trade specific stories and items not related to trade. Reference periods do vary, but with the exception of the Covid-19 response and trade negotiations with the EU which formally commenced in early March, most items relate to early May.

The results, presented in Figure 8, show government beginning trade negotiations with the USA (40%) clearly cut through to a greater degree than those around the UK-Japan priorities (10%).

More still (56%) say they had heard something about the government beginning trade negotiations with the EU. Meanwhile, just one in ten (12%) said they had heard something about the UK's new tariff regime.

**Figure 8: Prompted topic recall**




CV1. Which of the following topics do you recall having seen or heard about in the last 3 months?
Unweighted base size: All respondents (3,224)

### 5.4.2 More respondents specifically mention stories about lower standards or quality of goods

Those respondents who recalled having seen or heard something about how the UK trades with other countries in the previous week were asked to summarise what they had seen or heard in an open response format. Their answers were then coded into themes, each of which is presented in Figure 9 below.[23]

The most commonly cited theme was trade relationships with the USA, mentioned by 25% of respondents who had read, seen or heard something in the previous week. Highlighting the extent that stories related to our trading relationship with the USA are cutting through, this compares to 16% at wave two, and 8% at wave one.

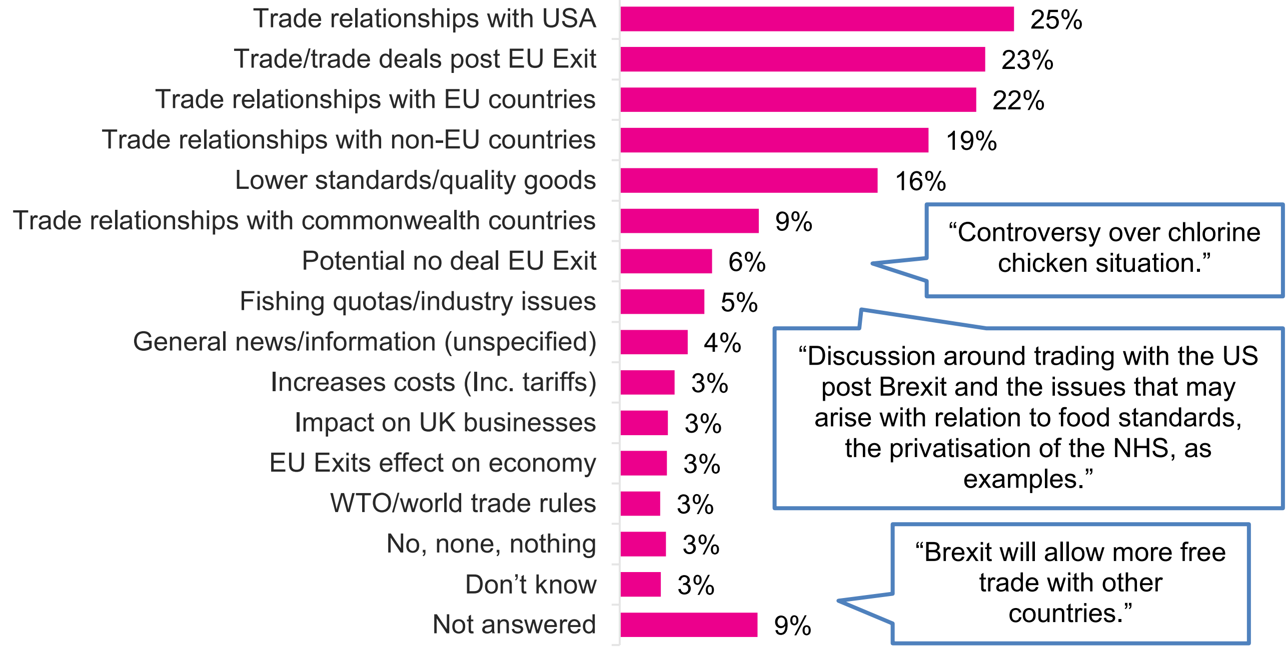
Meanwhile, 23% of those who had read, seen or heard something trade-related in the previous week mentioned trade or trade deals post EU Exit, 22% cited trade relationships with EU countries, and 19% mentioned trade relationships with non-EU countries.

Notably, 16% specifically mentioned lower standard/quality goods, which compares to just 1% that did so in waves one and two. Indeed a feeling that increased free trade could

[23] Given the different fieldwork periods, and thus the different events that took place in each, results between waves have not been compared.

have a negative impact on quality and standards is a wider trend that emerges from the results.

**Figure 9: Coded themes of what respondents had seen or heard in the previous week**




FT2. …and can you provide a brief summary or description of what you have heard?[24]
Open response question.
Unweighted base size: Where heard anything about how the UK trades with other countries (1,450)

### 4.4.3 Over a third report being aware of the negotiation priorities for a free trade agreement with the USA. The NHS, food safety, and animal welfare were topics which people have heard most about

In a separate question, respondents were specifically asked if they had heard something about the government publishing the UK's negotiation objectives for a trade agreement with the USA. Just over one in three (37%) said they were aware of the negotiating priorities.

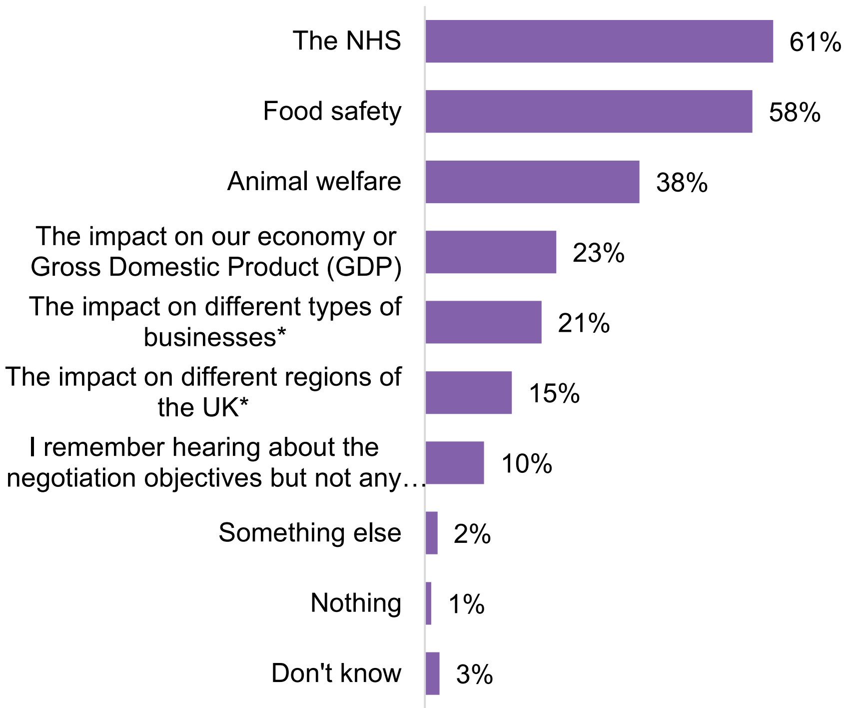
Those respondents who said they were aware were then asked what topics they had heard about, with a list of prompted topics.[25]

As shown in Figure 10, around 6 in 10 of those who said they had heard something said they remembered hearing something around the NHS (61%) and food safety (58%). Two in five also said they had heard something about animal welfare (38%).

[24] This question was coded as a multiple-response question rather than a single-response question. Consequently, themes are not exclusive and will add up to more than 100%.
[25] The same process was repeated with Japan negotiations priorities (discussed below).

Meanwhile, fewer reported hearing something about economic factors: 23% said they recalled something about the impact on our economy or Gross Domestic Product (GDP); and 21% said they had heard about the impact on different types of businesses.

**Figure 10: Recalled topics around negotiation priorities with the USA**

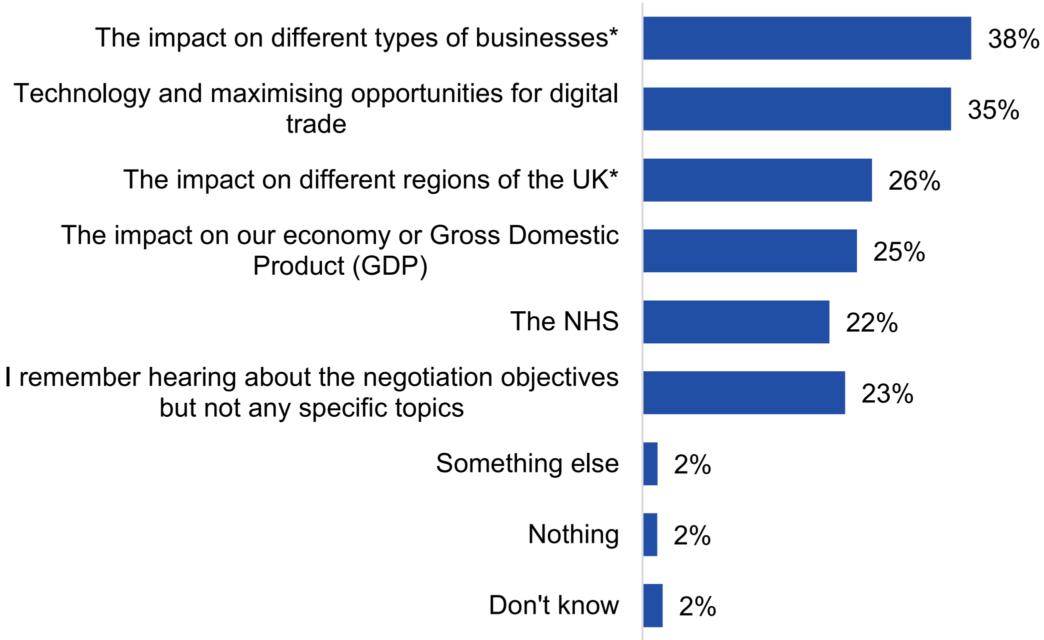



UP2. What topics, if any, do you remember hearing about this?
Open response question.
Unweighted base size: Where aware of negotiation priorities for a free trade agreement with the US (1,296).
*Option text shortened slightly for chart formatting.

Considerably fewer (16%) reported hearing something about negotiation objectives with Japan (see Figure 11).

Among those who did, there is less variation across recalled topics, but economic factors come higher up the list relative to the USA. For example, 38% said they had heard something around the impact on different types of businesses, and 35% selected something around technology and maximising opportunities for digital trade.

**Figure 11: Recalled topics around negotiation priorities with Japan**




UP2. What topics, if any, do you remember hearing about this?
Open response question.
Unweighted base size: Where aware of negotiation priorities for a free trade agreement with Japan (551).
*Option text shortened slightly for chart formatting.

# 5 Support for free trade agreements and perceived impact

## 5.1 Support for free trade agreements

### 5.1.1 Support for establishing free trade agreements outside of the EU is largely unchanged, although there is some evidence of increasing opposition

Respondents were asked about the extent to which they are supportive of the UK establishing free trade agreements with countries outside of the EU.[26] Changes from previous waves means that this 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.

As Figure 12 shows, two-thirds of respondents (67%) said they were supportive of the UK establishing free trade agreements with countries outside of the EU. This is consistent with wave one and wave two (both 66%). This includes 37% who were strongly supportive, unchanged from wave two.

Opposition to establishing free trade agreements with countries outside of the EU is very low, with just 7% of respondents opposed. Whilst still very low, opposition has increased significantly from 4% in wave two to 7% in wave three. A further quarter say they neither support nor oppose free trade agreements (17%) or are unsure (8%).

The proportion of respondents who are unsure has decreased from 15% in wave two to 8% in wave three.

When comparing different demographics across the three waves, there is a consistent pattern whereby the proportion of "don't know" responses decreases. This suggests that it is not a key group or groups who are driving this change, but rather a result of methodological changes or the change to question wording.

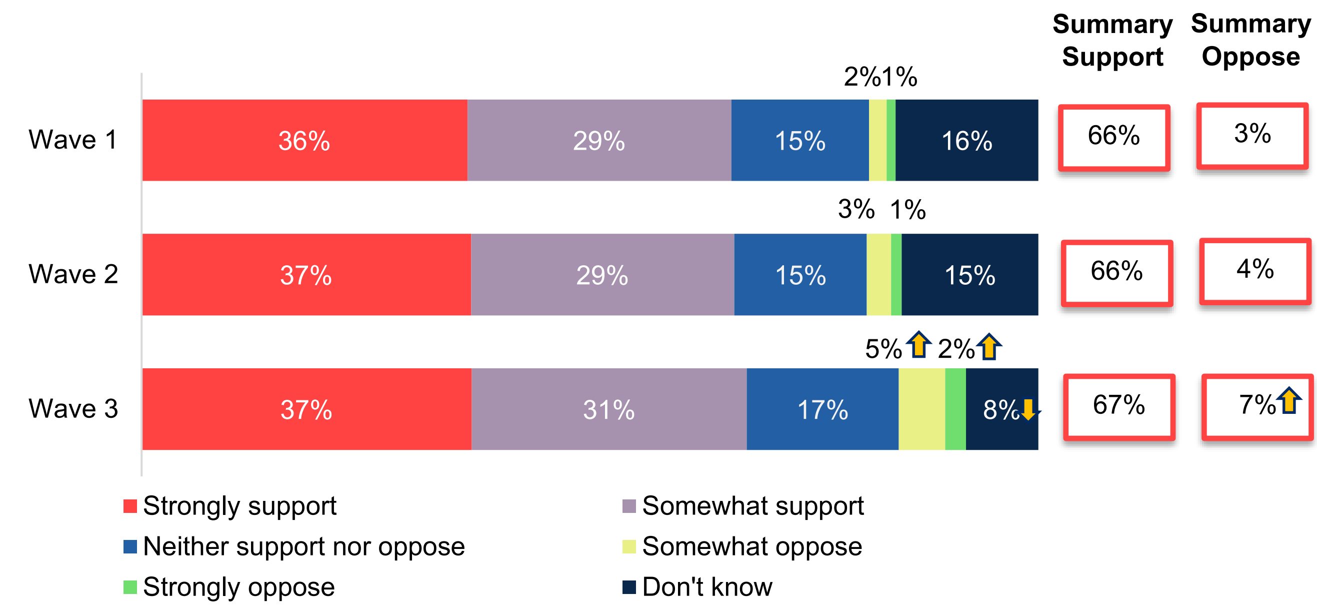
Despite the decrease in respondents answering "don't know", other options have increased by no more than 2 percentage points, showing that the overall story of support and opposition has not changed drastically.

Support for the UK arranging free trade agreements with countries outside of the EU is high and levels of opposition are very low. This does not mean to say that when the details of specific agreements become clear, the public support will remain unchanged.

[26] 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/

However, support and opposition at this broad level does not appear to be affected by the publishing of negotiating objectives.[27]

**Figure 12: Support and opposition to the UK establishing free trade agreements with countries outside the EU**




FT4. In general, would you say that you support or oppose the UK establishing free trade agreements with countries outside the EU?
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 = 2,400, Wave 2 = 2,349, Wave 3 = 3,224)
Statistical significance arrows represent significant differences when compared to results in the wave prior.

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

- men: By a margin of 13 percentage points, men (74%) are more likely than women (61%) to say they support the UK establishing free trade agreements with countries outside of the EU

- in higher socio-economic grades (SEG): Around three-quarters of those in SEG classifications AB (77%) support the UK establishing free trade agreements with countries outside of the EU. This compares to 7 in 10 (69%) respondents in SEG classifications C1 and C2, and 60% of respondents in grades DE

- older people: There is a fairly steady increase in support as you go up the age scale. 56% of those aged 16 to 24 support the UK establishing free trade agreements with countries outside of the EU, rising to 80% of those aged 65-74

[27] Fieldwork was conducted after the government published negotiating objectives for a trade agreement with the USA and a trade agreement with Japan, which has had no discernible impact on support or opposition. Please note that fieldwork was conducted prior to the government signing a free trade agreement with Japan on 23 October 2020.

- degree level qualifications: Three-quarters of those with degree or above level qualifications report being supportive of the UK establishing free trade agreements with countries outside of the EU (75%). This compares to two-thirds (65%) of those with non-degree qualifications, and a slim majority of those with no qualifications (55%)

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

Changes in support among sub-groups are limited to just a few groups, including: 18 to 24 year olds (plus 13 percentage points), those living in London and the South East (minus 3 percentage points) or South West (plus 11 percentage points).

### 5.1.2 Close to half support foreign businesses investing in the UK.

A new question this wave, respondents were asked about the extent to which they support foreign businesses investing in the UK. Whilst support is high, it is less than those that say they support signing free trade agreements (see Figure 13). Close to half (47%) say they support inward investment. Fewer than one in five (17%) are opposed, with 25% answering neither support nor oppose and 12% stating don't know.

The proportions saying they support foreign businesses investing in the UK is fairly stable across age groups. The proportions opposing do vary, with higher levels of opposition among those aged 65 to 74 (24%) and 75 and over (23%). This compares, for example, to 13% of those aged 35 to 44 and 12% of those aged 45 to 54.

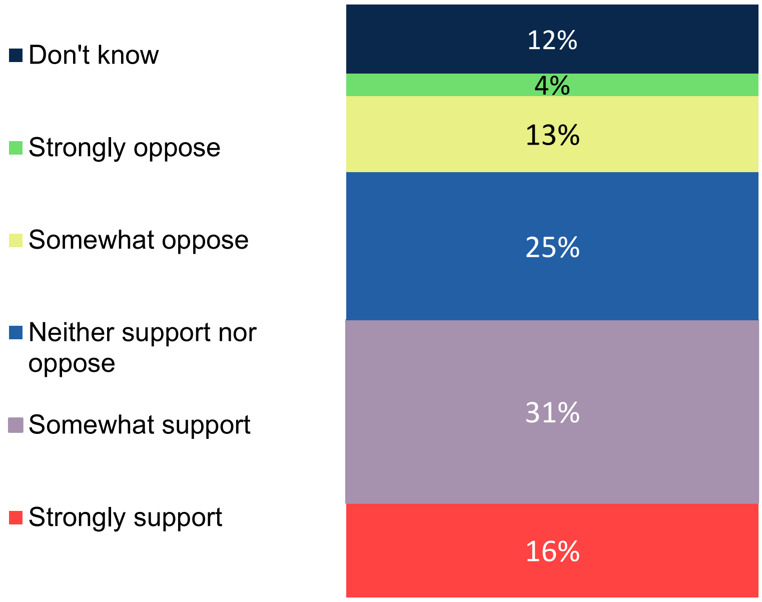
This highlights a nuanced and mixed picture when it comes to age. Although older respondents are more likely to support free trade with countries outside the EU and display more liberal attitudes on certain free trade measures, they are also more opposed to foreign inward investment. Likewise, older people are also more likely to agree with viewpoints suggesting a greater need for self-reliance in response to Covid-19.

The difference here is likely explained by a greater tendency among older people to advocate the UK producing and then selling goods to other countries, but a reluctance to be reliant on foreign investment and imports. So free trade is supported somewhat partially, with support more evident for exporting.

A higher proportion of females (27%) and those aged under 35 (30%) stated neither support nor oppose. Meanwhile, following the trends identified in a variety of other questions, respondents with a degree-level education (55%) are most likely to support foreign businesses investing in the UK. Those with no qualifications (30%) tend to be less supportive. Rather than a disproportionate proportion being opposed, those without qualifications are nearly three times more likely to say they don't know on this question

(33%).

**Figure 13: Support for foreign businesses investing in the UK**




INV. Businesses often invest in other countries. To what extent do you support or oppose foreign businesses investing in the UK?
Unweighted base size: All respondents (3,224)

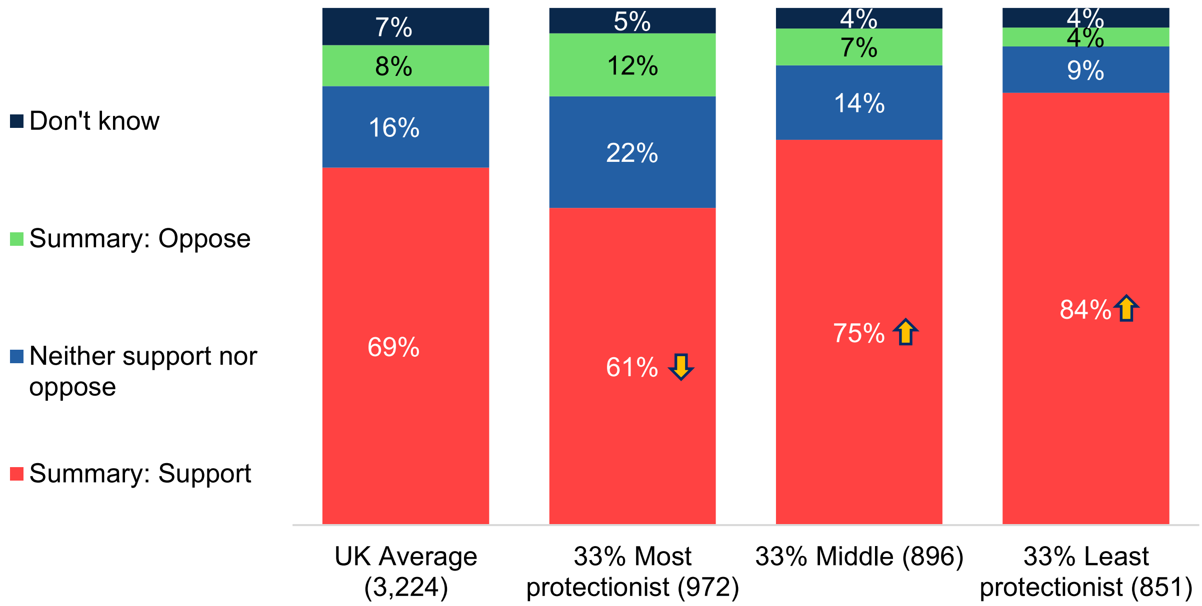
### 5.1.3 Highlighting high levels of support, around three in five of the most protectionist respondents still say they are supportive of free trade agreements with countries outside the EU

New to wave three, respondents were presented with pairs of statements and asked which statement their own views aligned most closely to.[28] The purpose of this question was to understand whether respondents have a more protectionist or liberal attitude towards international trade. Based on their responses, respondents were given a composite score and then split into three equal groups: Most protectionist, middle, and least protectionist.[29] Support and opposition for these groups are shown in Figure 14 below.

Around three in five (61%) of the most protectionist respondents still say they are supportive of free trade agreements with countries outside the EU. Whilst higher than the average, just 12% are in opposition; 22% neither support not oppose and 5% are unsure. The least protectionist respondents are most likely to support the UK establishing free trade agreements with countries outside of the EU (84%). Three-quarters (75%) of those in the middle group are supportive.

[28] See section 5.4.3 for further analysis of statements.
[29] Some respondents were not classified due to answering don't know at one or more of the statements.

**Figure 14: Reported levels of support by level of protectionism**




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

Regression analysis shows that the level of protectionism is a strong driver of support for the UK establishing free trade agreements with countries outside of the EU, with a relative importance score of 22%.

## 5.2 Perceptions of the impact of free trade agreements

### 5.2.1 There has been little change in perceptions around the impacts of the UK signing free trade agreements.

As Figure 15 illustrates, consistent with waves one and two, just under two-thirds (63%) think that signing free trade agreements with countries outside the EU would have a positive impact on the UK overall. This proportion was 62% in wave one and 63% in wave two. Likewise, just over half (52%) continue to think that the effect will also be positive on their daily lives (versus 54% in waves one and two). There has been a significant increase in the proportion stating the impact will be negative for the UK overall for a second wave in a row, although this is still a small minority.

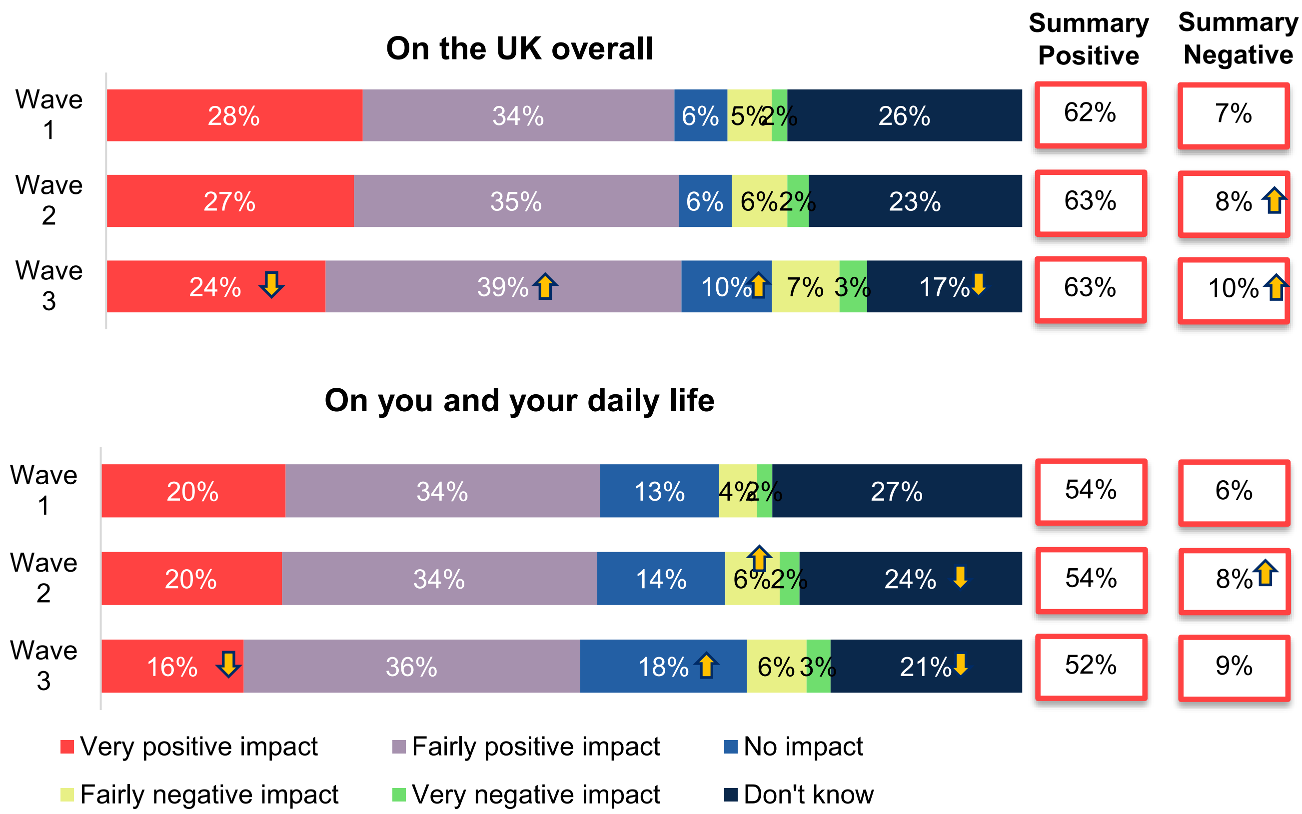
Whilst the proportion saying the impact will be positive is high, there is a gap between the proportion of respondents who state free trade agreements will have a positive impact on the UK overall, and those that state they will have a positive impact on their daily lives. This observation was also made in previous waves of the PATT. This continues to highlight that respondents are often less sure about the more immediate impact that free trade agreements may have on their daily lives, instead viewing it as something that has an effect at a more national level.

Much like the previous question exploring support for the UK to establish trade agreements with countries outside the EU, there has been a decrease in the proportion saying they don't know during wave three. It seems this has led to an increase in those saying free trade agreements will have no impact on the UK overall (10%, 6% in wave two) and on the respondent and their daily life (18%, 14% in wave two).

Furthermore, whilst there has not been a change in the overall level of positivity towards the impact of free trade, there has been a slight shift from very positive to fairly positive. This is particularly the case for the UK overall, but can also be seen to a lesser degree with respect to the question asking respondents about their daily lives.

Perceptions of the impact of signing free trade agreements is relatively consistent across countries and regions within the UK, with the exception of a few regions. Those living in the South East or South West of England are more likely to think that this will lead to positive impacts for the UK overall (both 70%).Those living in Scotland are less likely to think the impact would be positive for the UK overall (53%) or for their daily life (38%).

**Figure 15: Impact of free trade agreements on UK overall and daily life**




UK1. In general, do you think that the UK signing free trade agreements with countries outside the EU 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 EU would have a positive impact or a negative impact on you and *your daily life*?
Unweighted base sizes: All respondents (Wave 1 = 2,400, Wave 2 = 2,349, Wave 3 = 3,224).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

### 5.2.2 A high proportion continue to believe that increased free trade would lead to more jobs in the UK overall and in their local area

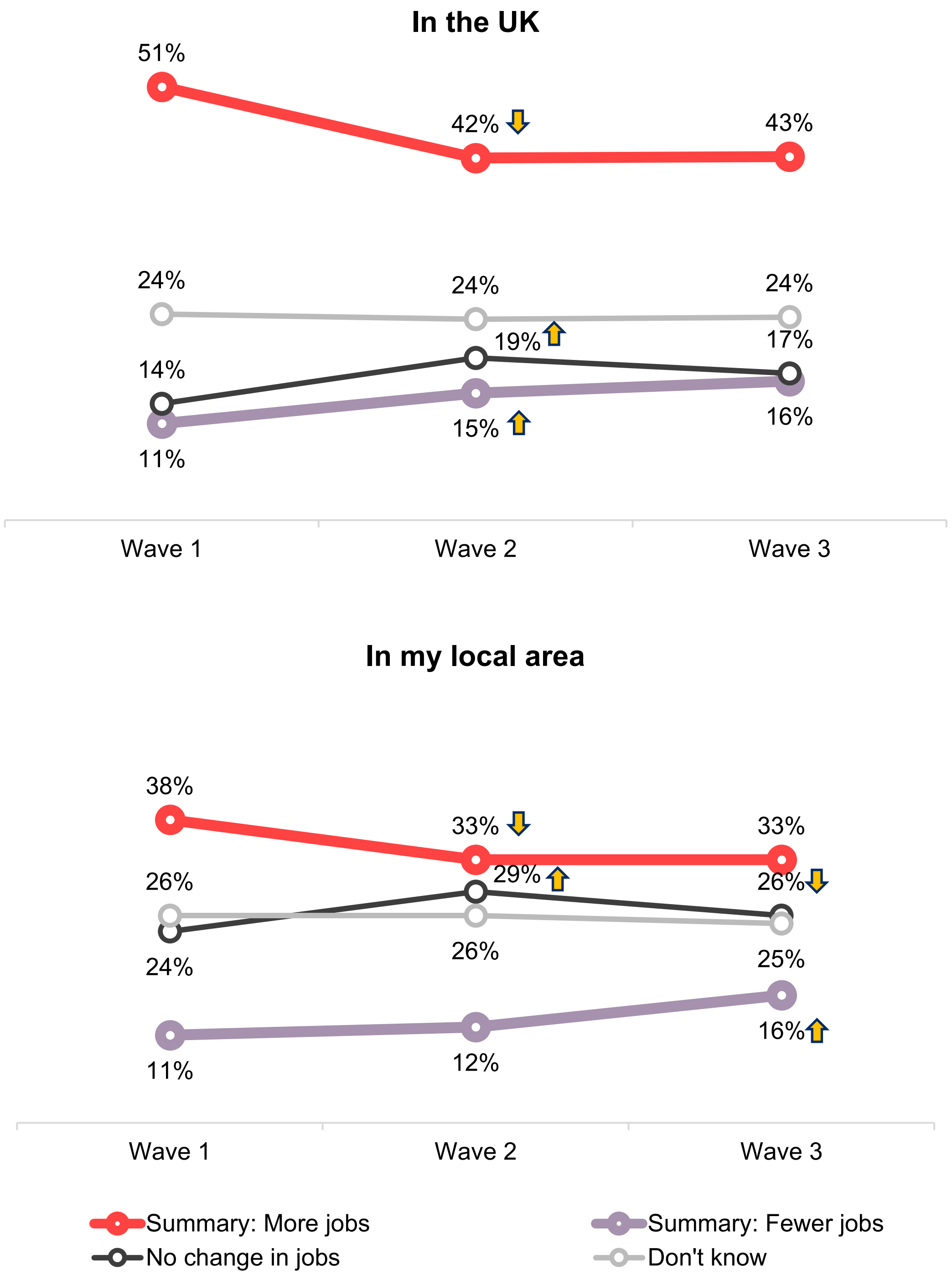
In addition to exploring perceptions around the impact of free trade agreements generally, respondents were asked about their perceptions of free trade with respect to the specific impact on jobs, wages, the quality of goods and services, and prices.

Perceptions of the impact to jobs from free trade in wave three is largely consistent with perceptions in wave two, especially when respondents are considering the impact to the UK overall. As is set out in Figure 16, two in five (43%) stated that increased free trade would create more jobs in the UK overall, whilst 16% stated that increased free trade would mean fewer jobs. None of the changes since wave two are statistically significant.

Belief that free trade would create more jobs in the local area has also remained consistent, with one in three (33%) selecting this for a second wave in a row. The number of respondents who believe that free trade would lead to fewer jobs locally has increased by 4 percentage points, from 12% in wave two to 16%. This increase has come from a decline in those who feel it would have no impact on jobs (26%, around 29% during wave two).

As with previous waves, there is a notable difference in the proportion saying that free trade would result in an increase in jobs in the UK overall compared to in their local area. The size of the gap, at 10 percentage points, is unchanged from wave two.

**Figure 16: Impact of free trade on jobs**




UK3. Now thinking about both the UK as a whole and then just your local area, do you think that increased free trade would result in more jobs being created overall, or fewer jobs being created overall? Unweighted base sizes: All respondents (Wave 1 = 2,400, Wave 2 = 2,349, Wave 3 = 3,224). Statistical significance arrows represent significant differences when compared to results in the wave prior.

### 5.2.3 The proportion who think increased free trade will lead to lower wages has increased for a second consecutive wave

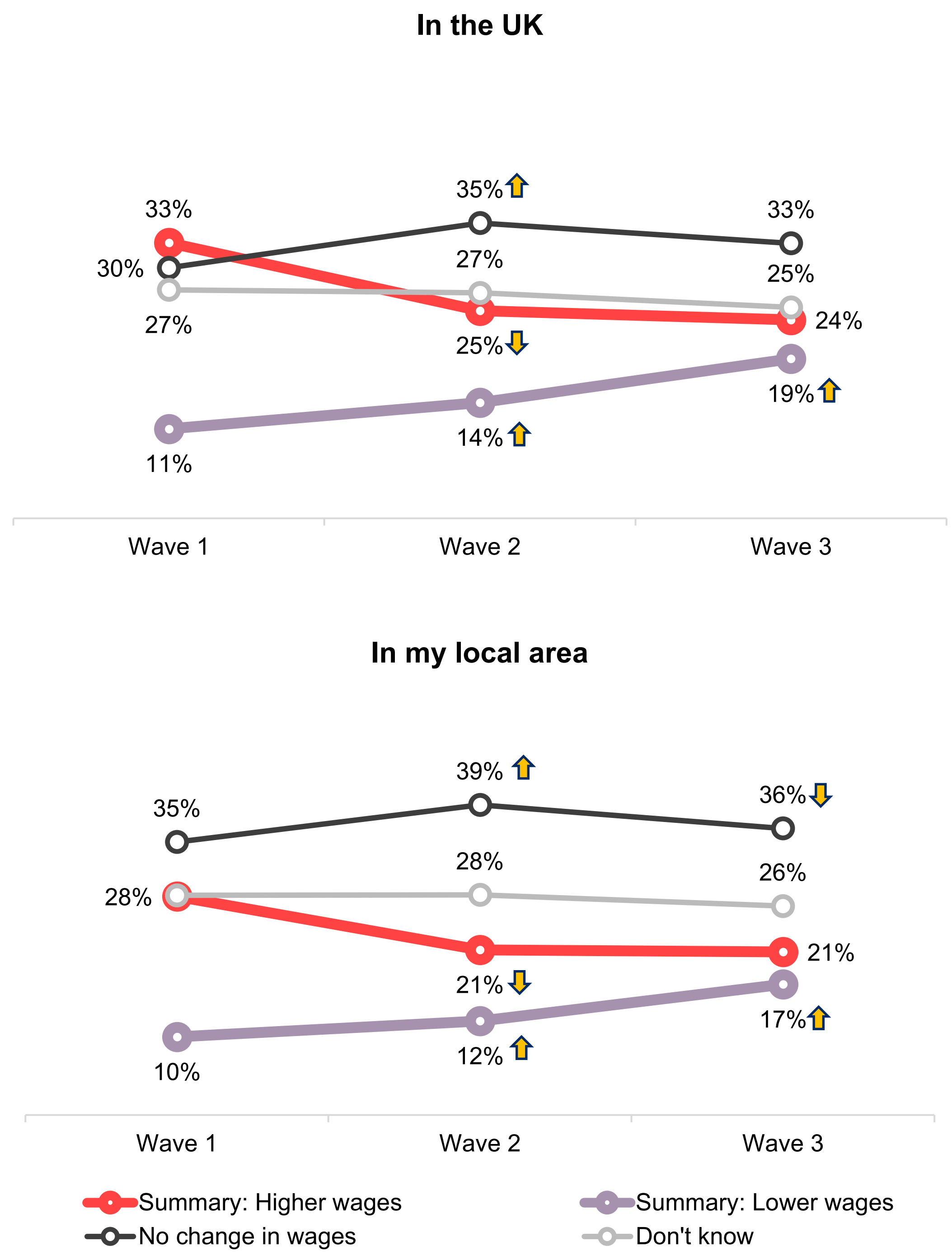
We also see an increase in the proportion believing that more free trade will lead to lower wages at both a national and local level (see Figure 17).

Around one in six (17%) believe that an increase to free trade would lead to a reduction in wages in their local area, an increase of 5 percentage points since wave two (12%). This is matched by a reduction in those who believe wages would increase, from 39% in wave two to 36% in wave three. Nearly one in five (19%) expect wages to decrease at a UK level as a result of increased free trade, representing an increase of 5 percentage points compared to wave two (14%).

These changes appear to be driven mainly by those aged under 65, so those respondents more likely to be of working age. For example, 27% of respondents aged 25 to 34 in wave three felt that increased free trade would lead to lower wages in the UK, compared to 14% of this age group in wave two. Similar shifts between wave two and wave three can be seen for all age groups up to those aged 65 and over.

It is important to keep in mind that this is a minority of respondents, with no more than one in five believing that increased free trade would lead to lower wages, either at a UK or local level. However, findings show that this proportion is gradually increasing over time.

**Figure 17: Impact of trade on wages**




UK4. Do you think that increased free trade would result in higher wages or lower wages? In the UK
UK4. Do you think that increased free trade would result in higher wages or lower wages? Your local area
Unweighted base sizes: All respondents (Wave 1 = 2,400, Wave 2 = 2,349, Wave 3 = 3,224).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

### 5.2.4 General themes around improved opportunities, free trade being generally good for the economy, and lower prices are reasons why respondents think increased free trade will have a positive impact on the UK

Respondents were asked in an open response format to say why they felt the impact on the UK overall would be positive or negative.[30]

Examining the responses for those who state the impact would be positive (63% of respondents), the most cited reason is improved trading opportunities (23%), as shown in figure 18. Meanwhile, others simply state responses along the lines of "free trade is good" (15%). This is followed by lower prices (12%), free trade being good for the economy (12%), and more choice (8%).

**Figure 18: Reasons for perceived positive impact on UK overall**


UK1a. What makes you say this?
Open response question.[31]
Unweighted base size: Where believe will have positive impact on UK (2,040)
Please note that coded responses that did not reach a threshold of 3% have not been presented on this chart.

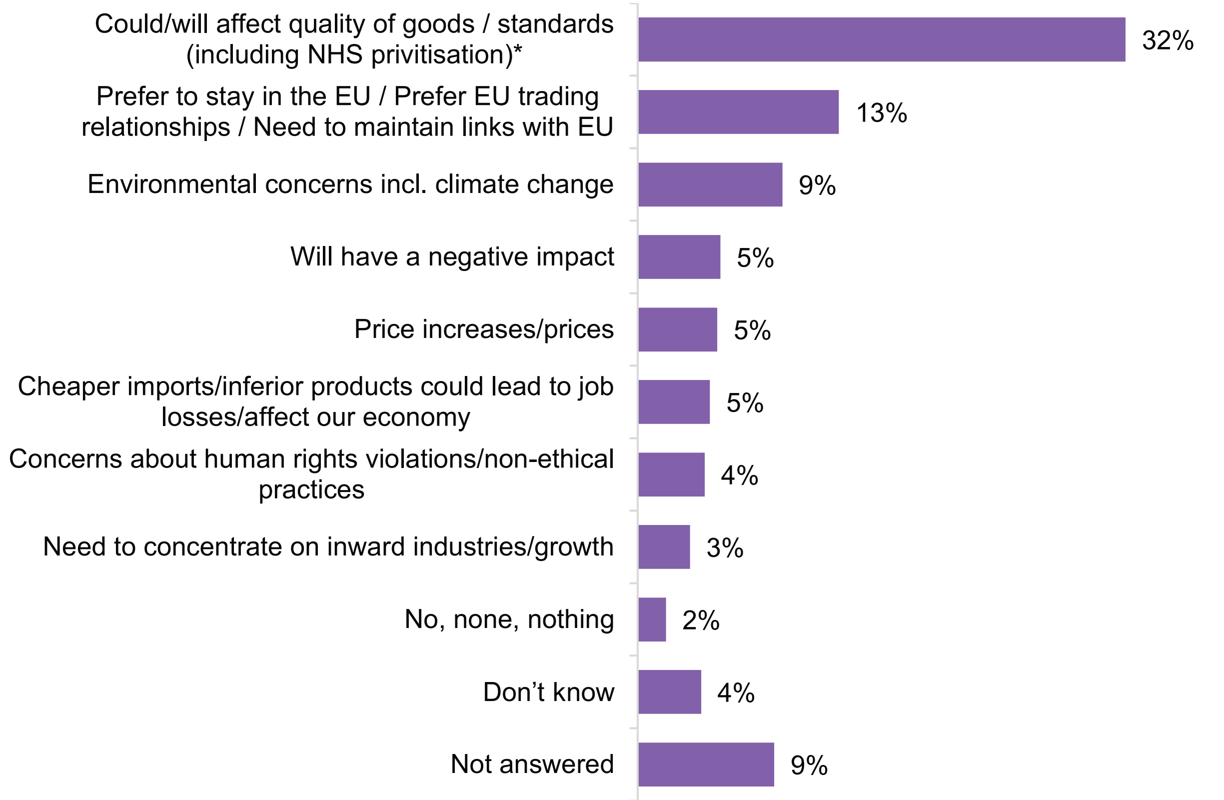
[30] The question text was routed on the basis of the response at question UK1.
[31] This question was coded as a multiple-response question rather than a single-response question. Consequently, themes are not exclusive and will add up to more than 100%.

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

Examining the results for those who believe increased free trade would have a negative impact on the UK overall (10% of respondents), one particular theme stands out more than any other. A third (32%) of this group said that it could affect the quality of goods or services (see figure 19).

The next most commonly cited themes were items relating to EU trading relationships and the need to maintain links with the EU (13%), and concerns about the environment and or climate change (9%).

**Figure 19: Reasons for perceived negative impact on UK overall**




UK1a. What makes you say this?
Open response question.
Unweighted base size: Where believe will have negative impact on UK (425)
Please note that coded responses that did not reach a threshold of 3% have not been presented on this chart.
*Some codes have been shortened for the purposes of presentation. See footnote for full code.[32]

[32] Full code: Could/will affect quality of products/goods, reduce safety & food standards/animal welfare rights/privatisation of the NHS etc

### 5.2.6 More respondents expect a decrease in the price of goods and services if free trade increased, but an increasing minority expect the quality to be poorer

The proportion of respondents who expect prices to drop as a result of increased free trade has risen (see Figure 20). Two in five (39%) respondents in wave three believe prices would decrease, compared to one in three (34%) in wave two.

Changes in attitudes towards the effect on price of goods and services seems to be associated with social class and levels of deprivation, particularly the middle classifications in those categories. For example, the proportion of respondents in the third IMD quartile who think prices would reduce increased from 30% (wave two) to 40% (wave three).[33] Comparatively, figures for those in the first IMD quartile is consistent with wave two (42%, compared to 41% at wave two). A similar trend is seen when looking at SEG, with those classified as C1 and C2 seeing a greater increase than those as AB or DE classifications.

There has been an increase in the proportion who think increased free trade would lead to lower prices. There has also been an increase in those who would expect it to lead to poorer quality goods and services, echoing some of the findings reported elsewhere in this report. Close to one in four (23%) would expect increased free trade to lead to poorer quality goods and services. This is 6 percentage points more than wave two (17%) and nearly twice as many as wave one (12%). The proportion who feel it would lead to higher quality goods and services (26%) has not changed significantly from wave two (25%). However there has been a drop in those who feel increased free trade would have no impact on quality, from 36% to 33%.

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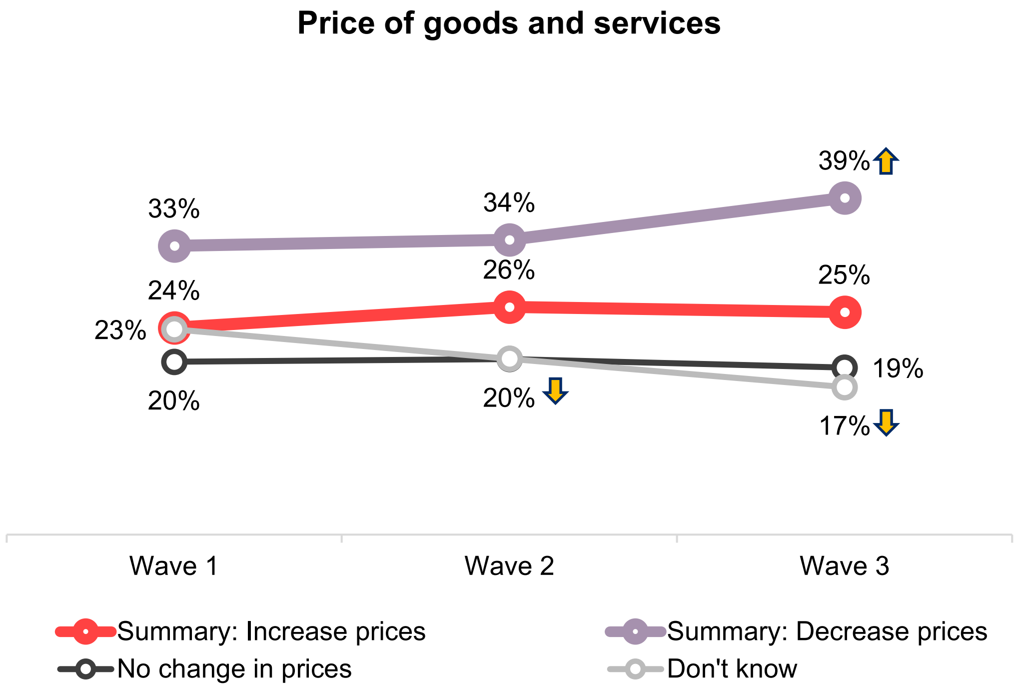
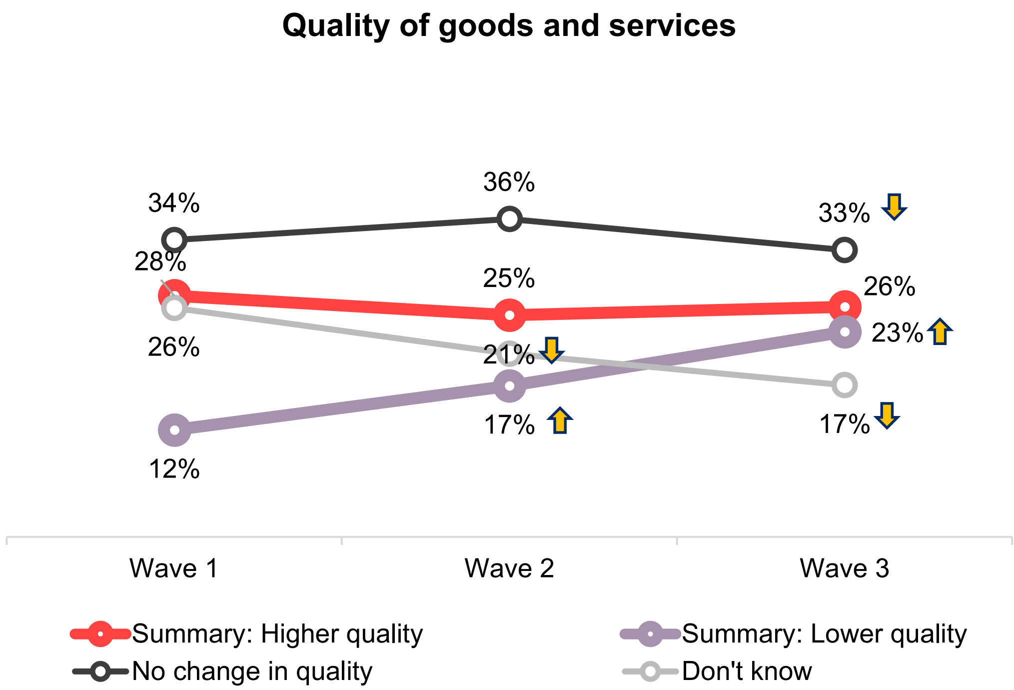
[33] Indices of Multiple Deprivation (IMD) is a measurement of deprivation used throughout the UK. For this research, areas have been categorised into quartiles. Therefore, the first quartile will consist of the 25% least deprived areas in the UK and the fourth quartile the 25% most deprived areas.

**Figure 20: Impact of trade on the price and 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 = 2,400, Wave 2 = 2,349, Wave 3 = 3,224).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

## 5.3 Future economic outlook

### 5.3.1 Three in five respondents expect the UK economy will be slow to recover from the effects of Covid-19

The survey also explored the economic outlook of respondents at the time of fieldwork. The question asked how long they expect it would take for the UK economy to recover from the effects of Covid-19 once lockdown restrictions are lifted. This was a new version of a question asked at wave two which asked about economic conditions more generally.

Overall, respondents were more pessimistic than they were optimistic about how quickly the economy will recover from the effects of Covid-19 (see Table 4). Around three in five (59%) expect the UK economy will be slow to recover, nearly twice as many as those who expect it to recover quickly (32%).

**Table 4: Speed of economic recovery from effects of Covid-19[34]**

| ECON. Once lockdown restrictions are lifted, do you think the UK economy will be slow or quick to recover from the effects of Covid-19? | Total (3,224) |
|---|---|
| Very quick to recover (that is by the end of 2020) | 3% |
| Fairly quick to recover (that is within 1 to 2 years) | 30% |
| Fairly slow to recover (that is within 2 to 5 years) | 43% |
| Very slow to recover (that is within 5 to 10 years or longer) | 17% |
| Don't know | 8% |

The estimated speed of recovery differs significantly by gender, with males expecting a faster recovery than females. Nearly two in five (38%) males expect a quick recovery, compared to 27% of females. Similarly, nearly two-thirds of females (64%) expect recovery to be slow, 9 percentage points more than males (55%).

### 5.3.2 Respondents who are more pessimistic about a quick economic recovery in relation to Covid-19 are more likely to think increased free trade will have a negative impact

Figure 21, below, shows how attitudes towards economic recovery are linked to attitudes about the economic impact of free trade. Figure 21 reports the impact on job and wages locally, but these results presented are selected as indicative of the relationship for other questions exploring perceived impact and support for free trade.[35]

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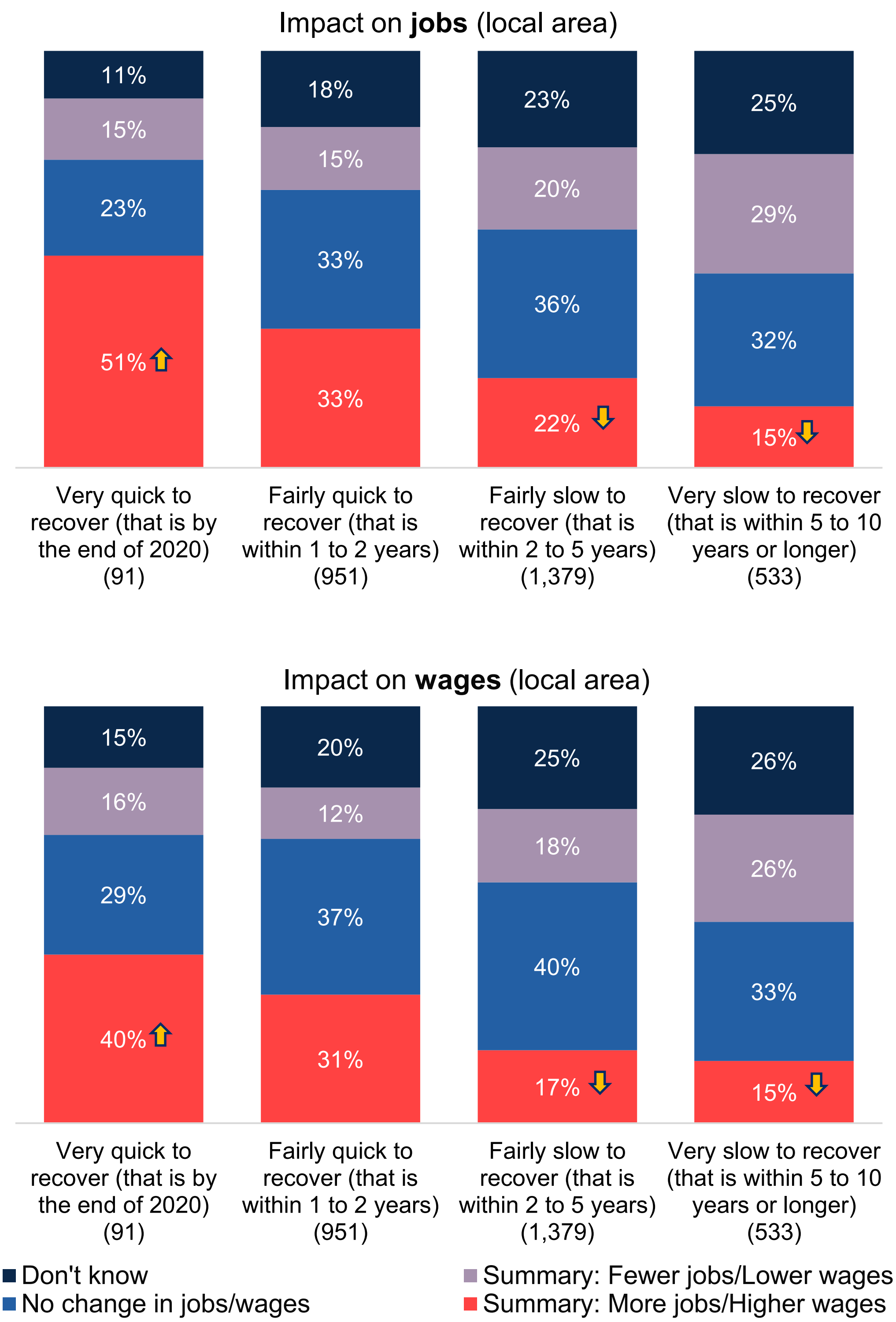
[34] Statistical significance arrows represent significant differences against the average result.
[35] Regression analysis at FT4 confirms that levels of economic optimism around Covid-19 was a statistically significant driver of support for free trade agreements with countries outside the European Union. Full regression outputs are available in the appendix.

Taking the impact on local jobs as an example, 51% of the small minority who think the economy will be very quick to recover think increased free trade will lead to more jobs overall. This compares to 15% of those who say the economy will be very slow to recover.

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

**Figure 21: Impact of trade on the quality of goods and services and prices**




UK3. Now thinking about both the UK as a whole and then just your local area, do you think that increased free trade would result in more jobs being created overall, or fewer jobs being created overall?
UK4 … still thinking about the UK as a whole, and then just your local area, do you think that increased free trade would result in higher wages or lower wages?
Unweighted base size: All respondents (Wave 3 = 3,224)
Statistical significance arrows represent significant differences when compared to total. Only marked for more jobs.

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

### 5.4.1 Results suggest that awareness of the CPTPP has increased, however this should be treated with caution due to possible mode effects

The survey explored existing awareness and attitudes towards the UK joining the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). The CPTPP is a trade agreement between Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore, and Vietnam which came into force on the 30 December 2018.

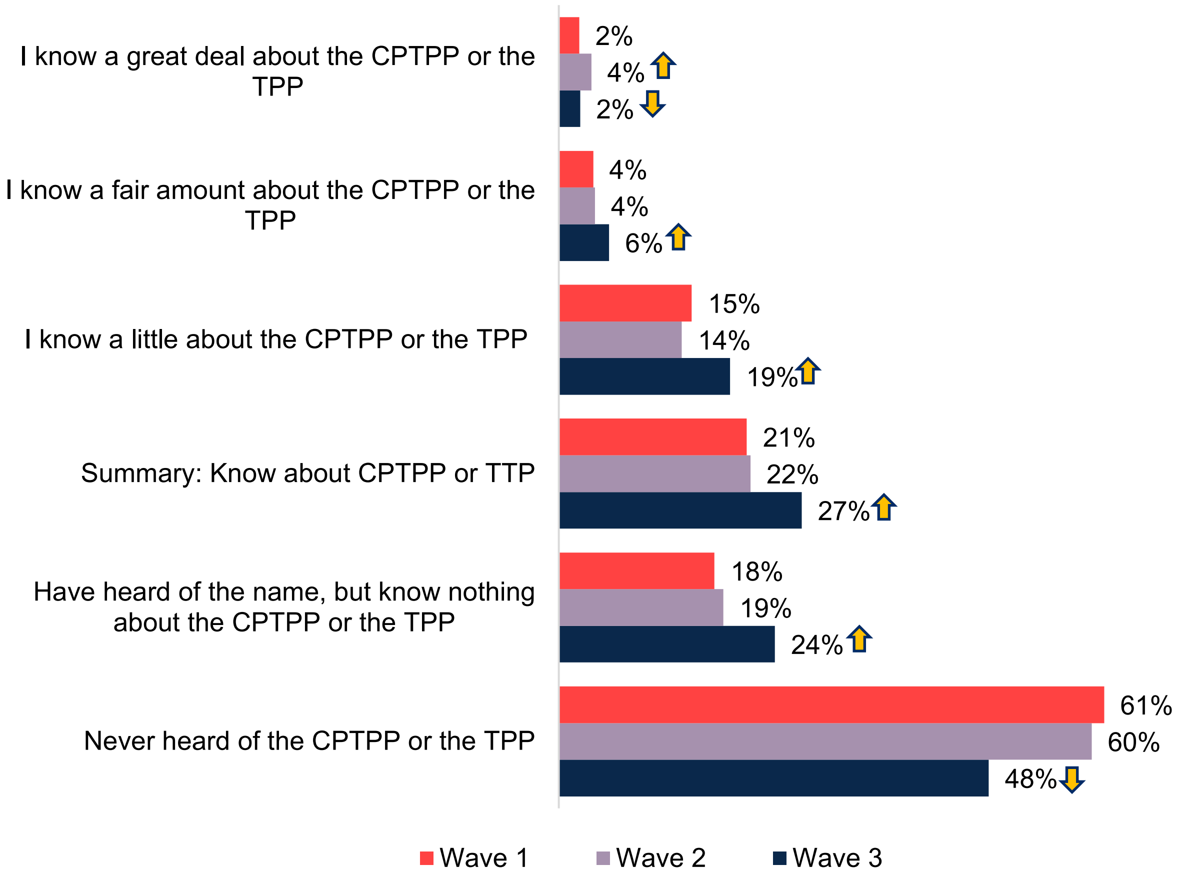
Respondents were asked about their awareness of the deal. Those who indicated some degree of awareness were asked about the extent to which they would support or oppose the UK joining the agreement. This is illustrated in figure 22.

Awareness has improved this wave, with 27% knowing at least a little about CPTPP or its predecessor, an increase of 5 percentage points from wave two (22%). Around a quarter (24%) of respondents have heard of the name but otherwise have no knowledge about it, also an increase of 5 percentage points from the last wave (19%). This means that those with no awareness has reduced from six in ten (60%) to under half (48%).

However, these results should be treated with caution. As discussed earlier, the change to methodology appears to have had more of an impact on questions around knowledge and awareness. Therefore this question is particularly susceptible to increased overclaim.[36]

[36] When comparing wave two push-to-web completes and wave three push-to-web completes, the levels of awareness are consistent, suggesting that the awareness is being driven by changes to the methodology.

**Figure 22: Awareness of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) or the Trans-Pacific Partnership (TPP)**



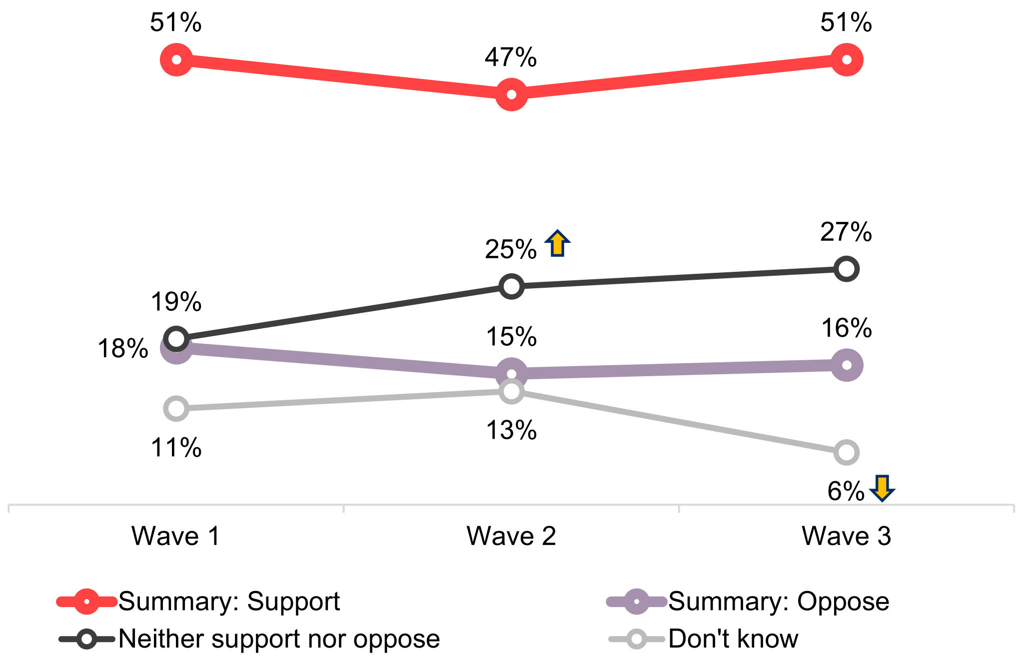

CPTPP. How aware are you of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) formerly known as Trans-Pacific Partnership (TPP)?
Unweighted base sizes: All respondents (Wave 1 = 2,400, Wave 2 = 2,349, Wave 3 = 3,224).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

### 5.4.2 Although awareness has increased, support for the UK joining the CPTPP has remained consistent

Respondents that indicated some degree of awareness of the agreement (beyond simply reporting having heard of the name) were asked about whether they would support the UK joining the agreement (see Figure 23).

Support for joining CPTPP among those who indicated awareness of the agreement was 51%, consistent with support at wave one and two (51% and 47% respectively). Levels of opposition also remain stable, with 16% opposed (versus 15% at wave two).

**Figure 23: Support for the UK to join the CPTPP**




CPTPPa. To what extent would you support or oppose the UK joining the CPTPP?
Unweighted base sizes: All respondents aware of the CPTPP or TPP (Wave 1 = 538, Wave 2 = 529, Wave 3 = 958)
Statistical significance arrows represent significant differences when compared to results in the wave prior.

### 5.4.3 The UK public tend to sway more towards liberal attitudes than protectionism, but there is more acceptance of a protectionist argument in the context of the UK's response to Covid-19

Newly added at wave three, the results show that the UK public tends to lean more towards liberal free trade attitudes rather than protectionist positions. Using a grid format, three questions using a 0 to 10 scale with opposing sentiments at each end were presented to respondents. Responses are detailed in figure 24.

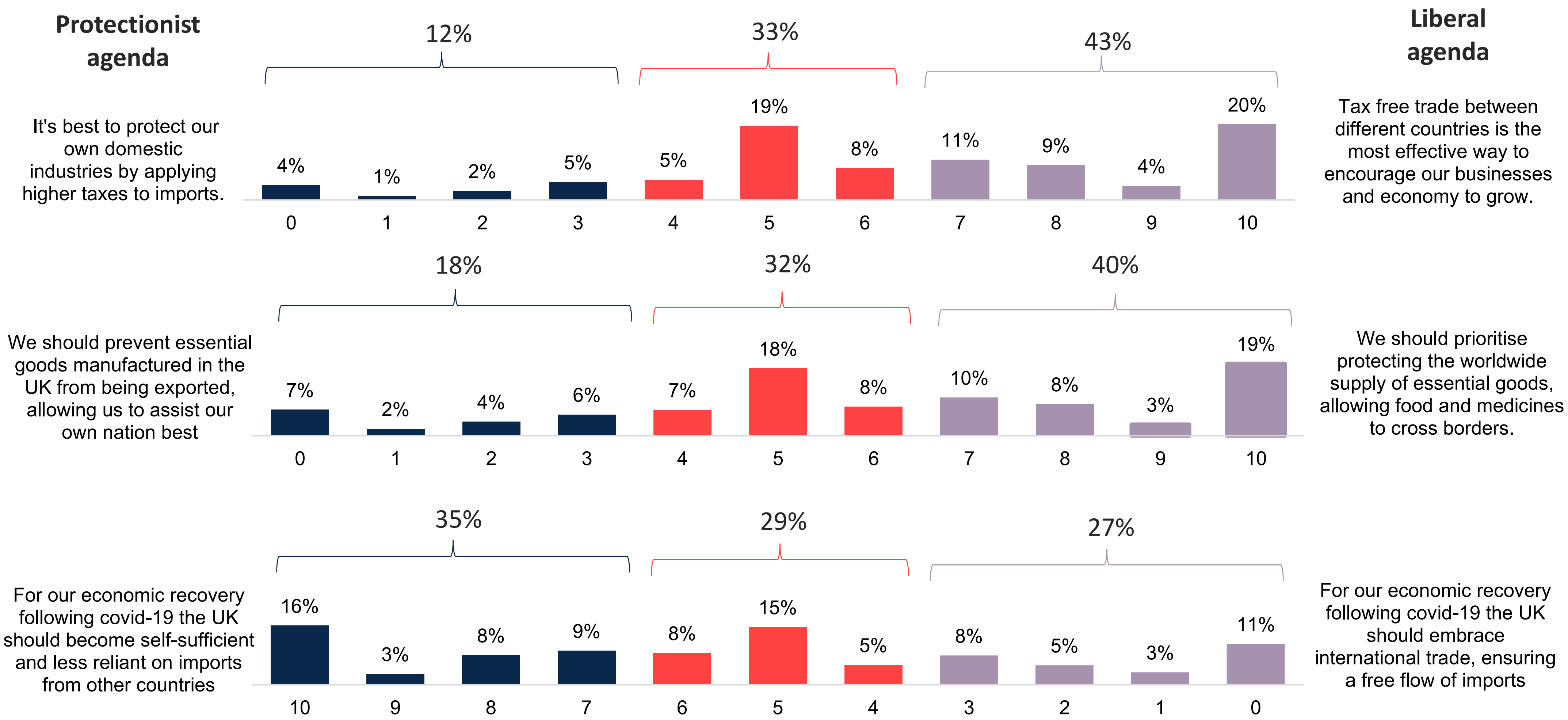
Two in five (43%) lean towards free trade as an effective way for the economy and businesses to grow. Conversely, 12% lean towards the notion that it is best to protect our own domestic industries .

Likewise, two in five (40%) lean towards prioritising the worldwide supply of essential goods, allowing food and medicines to cross borders, with 18% favoured the notion of preventing this type of goods from being exported outside of the UK.

One area where there are higher levels of the agreement for a protectionist rather than liberal argument is with respect to the implications for trade as a result of Covid-19. Around a third (35%) favoured that as a response to Covid-19, UK should become selfsufficient and less reliant on imports. This was slightly more than lean towards embracing international trade and ensuring a free flow of imports (27%).[37]

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

**Figure 24: Protectionist versus liberal free trade attitudes**




CV2: Here are some pairs of statements. Please indicate where your own view lies on a 10-point scale where 0 means complete agreement with the statement on the left, 10 means complete agreement with the statement on the right, and 5 means you don't agree with either of the statements or that your views are mixed or balanced on the issue in question.
Unweighted base size: All respondents (3,224).

# 6 Trading partner preferences

## 6.1 Support for free trade agreements with specific countries

### 6.1.1 Support for establishing free trade agreements with USA, China, and India continues to decline.

Respondents were presented with six non-EU countries and asked to what extent they would support or oppose the UK establishing a free trade agreement with them. Five countries put to respondents remained identical to those asked about in waves one and two; Japan was also added for wave three. The findings are presented in Table 5.

Securing a free trade agreement with Australia and New Zealand still draws widespread support (65% and 64% respectively), with support for Japan above half too (56%). Opposition to these countries is very low at below 10% of respondents. Whilst less than half support agreeing a free trade agreement with the USA (49%) and India (43%), support is still higher than opposition. The same cannot be said for China, where opposition (35%) is now higher than support (28%).

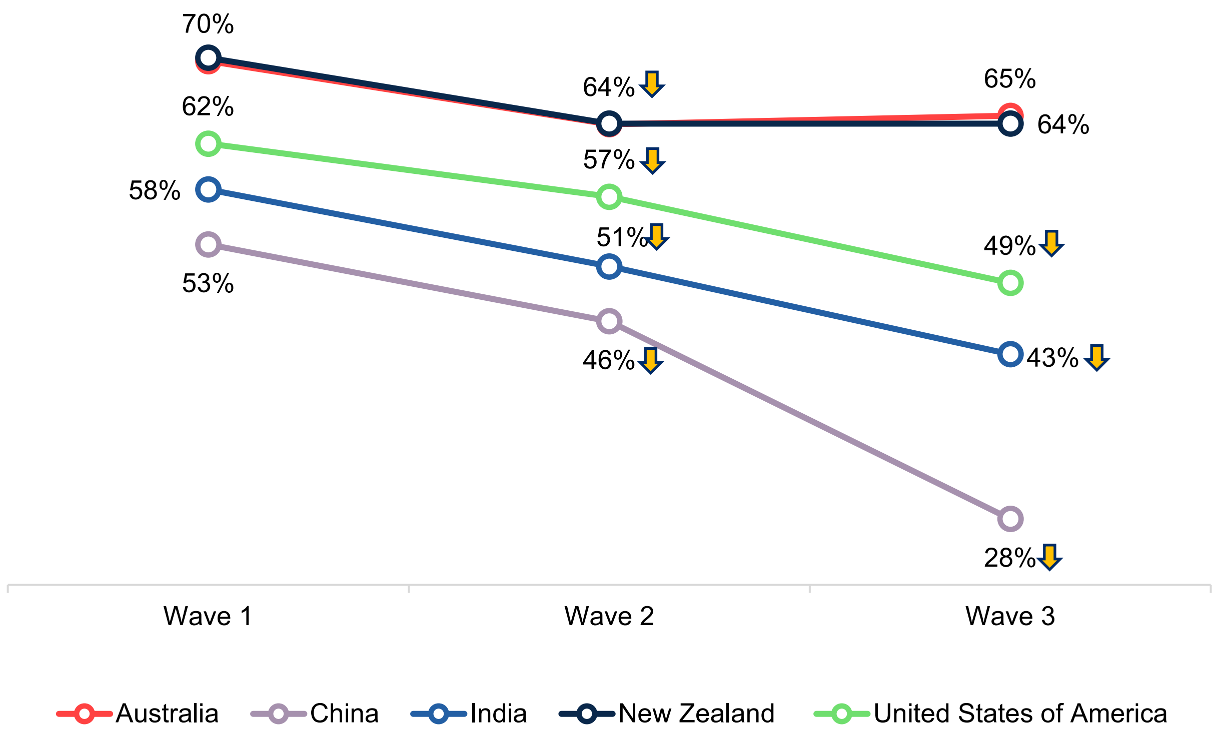
**Table 5: Changes in support and opposition between wave two and wave three**

| | **Australia** | **New Zealand** | **Japan** | **USA** | **India** | **China** |
|---|---|---|---|---|---|---|
| Strongly support | 37% | 37% | 30% | 23%↓ | 16%↓ | 10%↓ |
| Somewhat support | 28% | 27% | 26% | 26% | 28% | 18%↓ |
| Neither support nor oppose | 18%↑ | 18%↑ | 23% | 19%↑ | 28%↑ | 25%↑ |
| Somewhat oppose | 4% | 3% | 5% | 11%↑ | 11%↑ | 18%↑ |
| Strongly oppose | 2% | 2% | 3% | 9%↑ | 4% | 17%↑ |
| Don't know | 11%↓ | 12%↓ | 13% | 11%↓ | 13%↓ | 13%↓ |
| **Summary: Support** | **65%** | **64%** | **56%** | **49%↓** | **43%↓** | **28%↓** |
| **Summary: Oppose** | **5%** | **5%** | **8%** | **20%↑** | **15%↑** | **35%↑** |
| **NET score** | **+60%** | **+59%** | **+48%** | **+29%** | **+28%** | **-7%** |

Statistical significance arrows represent significant differences when compares to results observed at wave two. Japan added at wave three, so has not been compared to wave two.

Figure 25 shows how support for free trade agreements with each country has changed over the waves. Following a drop in support for free trade agreements with each of the countries listed in wave two, Australia and New Zealand have stayed the same for wave three. Out of the three countries where support has decreased, China has been the most affected with a drop in support of 18 percentage points. Analysis shows that this drop in support is fairly universal across most demographic subgroups.

**Figure 25: 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 = 2,400, Wave 2 = 2,349, Wave 3 = 3,224).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

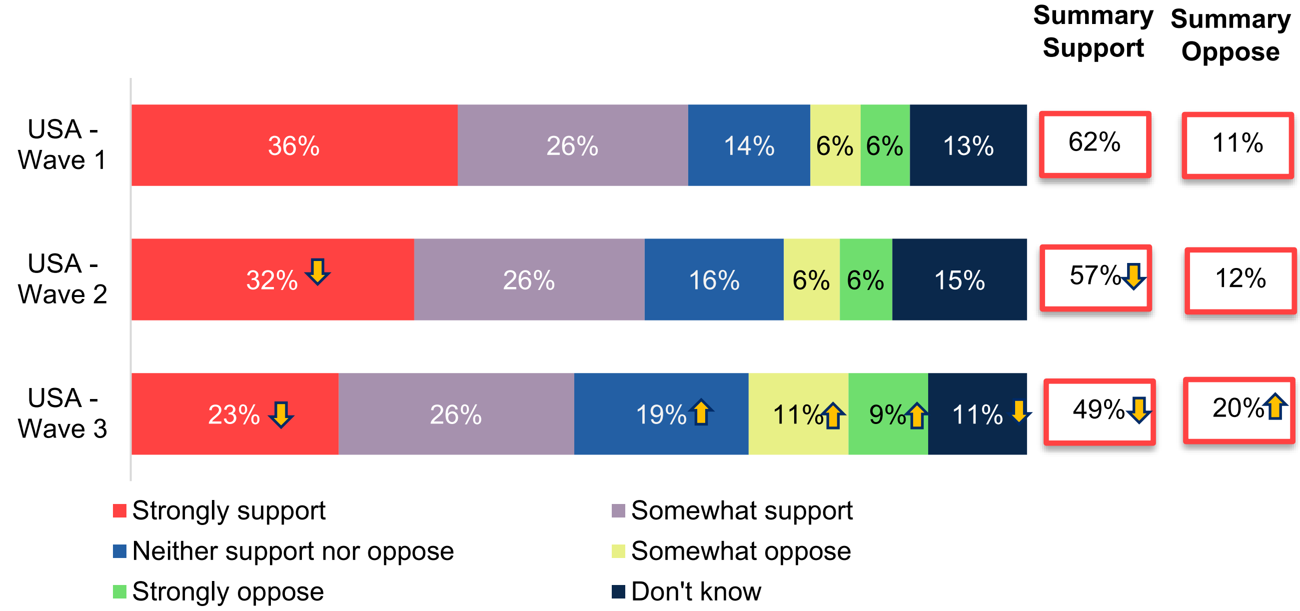
### 6.1.2 Support for a trade agreement with the USA has dropped for a second consecutive wave, with opposition also increasing for the first time. The strength of support is also on the decline, with fewer strongly supportive

Support for establishing a free trade agreement with USA has dropped for a third wave in a row, as shown in figure 26. Following a high of 62% at wave one, support is now at around half (49%). Notably, the strength of support has decreased. In wave one, 36% strongly supported establishing a free trade agreement with USA; this has reduced by 13 percentage points to 23%. Those who somewhat support has remained consistent at 26%. Meanwhile, opposition has increased for the first time, from 12% in wave two to 20% in wave three.

Support for a free trade agreement with the USA dropped for both males and females, but the drop has been larger for females. In wave two, 52% of females supported this, which has dropped significantly to 42% in wave three. By comparison, support from males has dropped from 63% to 58%. Opposition from females has also doubled from 11% in wave two to 22% in wave three. Male opposition increased from 13% to 17%. Decreases in support have been more consistent across other demographics such as age or SEG. There has also been notable decreases in those saying they don’t know how they feel.

As fieldwork was conducted prior to the 2020 USA Presidential Election, it is possible that support and opposition for establishing a free trade agreement with USA will change going forward. Any changes in support for establishing an FTA between fieldwork and publication of this report have not been reflected.

**Figure 26: Support and opposition to the UK establishing free trade agreements with USA**




TP2. To what extent would you support or oppose the UK establishing a free trade agreement with each of the following countries?
Unweighted base sizes: All respondents (Wave 1 = 2,400, Wave 2 = 2,349, Wave 3 = 3,224).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

## 6.2 Trade agreement priorities

### 6.2.1 Considerations such as creating new jobs in the UK and maintaining UK food standards continue to be a high priority for many respondents. This is regardless of the country negotiating free trade agreements with the UK

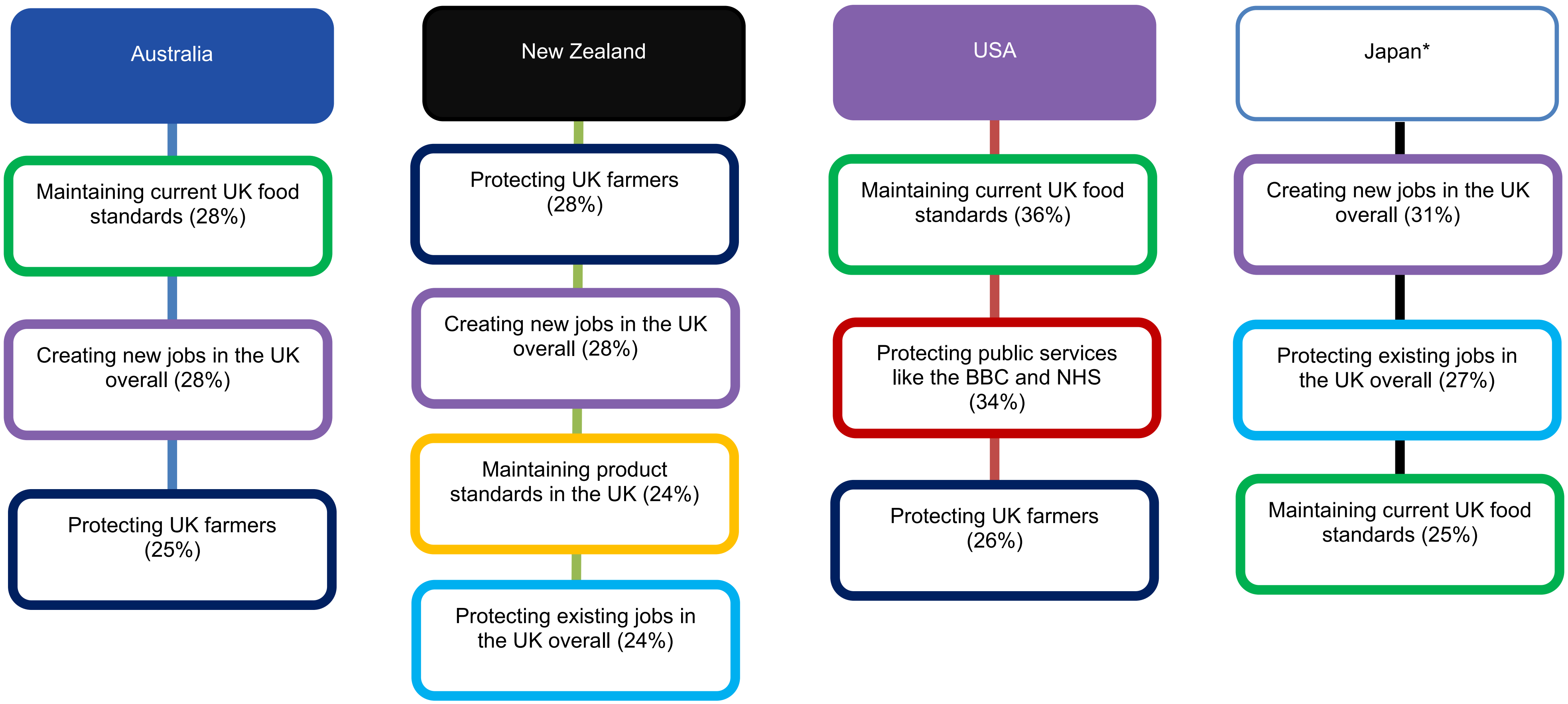
For a second wave in succession, respondents were asked to think about what considerations the UK government should give priority to when negotiating free trade agreements with Australia, New Zealand, the USA, and Japan.[38] For each of the countries, respondents could select up to three considerations they saw as highest priority from a suggested list. The top three most frequently selected considerations for each country are presented in Figure 27.

[38] Readers should note that changes to the question in wave three include the removal of China for Japan and the addition of new codes. Consequently, comparisons between wave two and wave three are to be treated with caution.

Certain priorities were selected as important irrespective of the country in question. These included considerations around creating new jobs in the UK overall, maintaining product and food standards and protecting UK farmers.

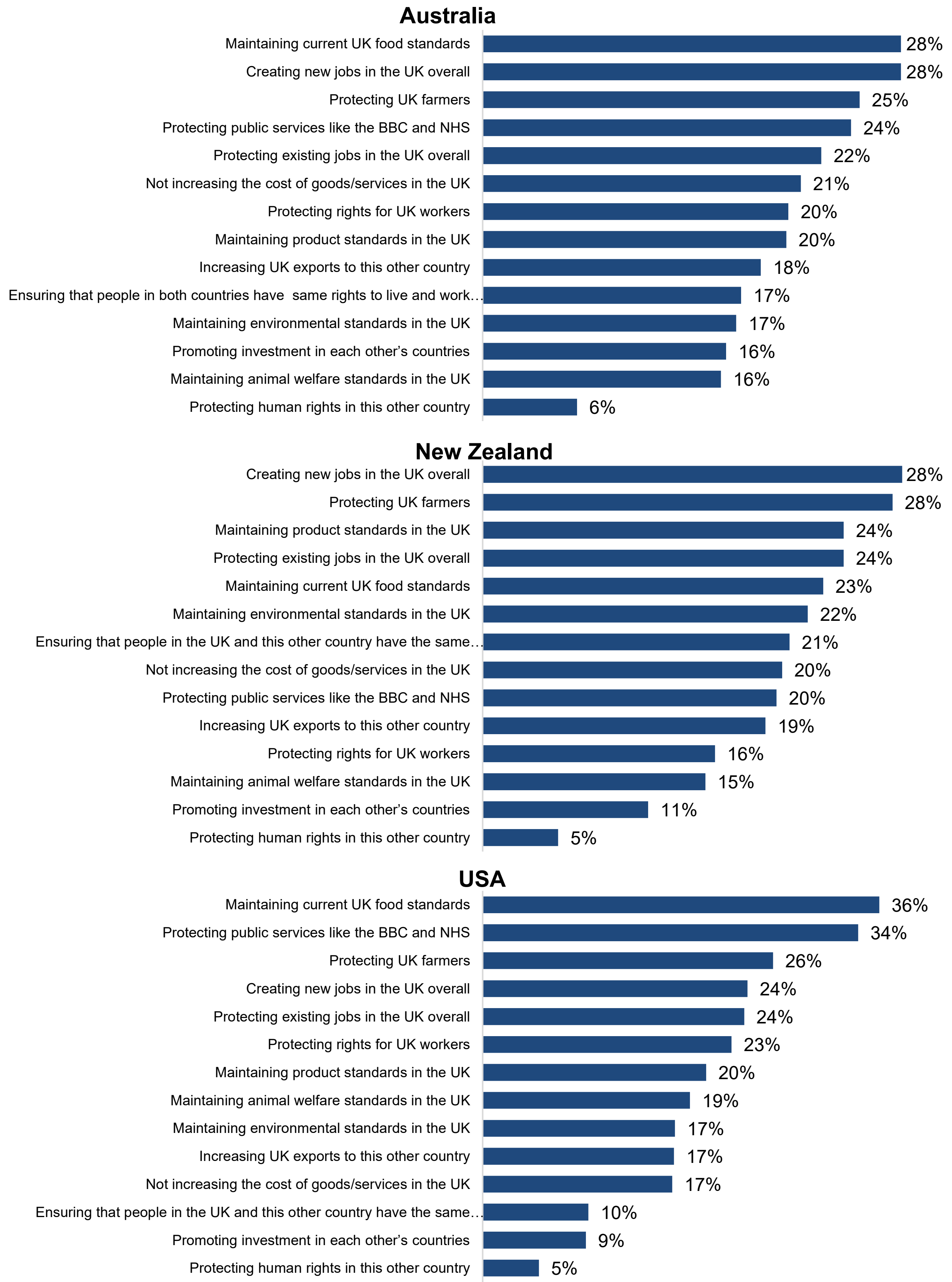
There were some differences between priorities for countries, in particular the USA. As with wave two, protecting public services like the BBC and NHS was considered to be one of three most important considerations when negotiating a free trade agreement with the USA. For the second wave in a row, 34% chose this option. This consideration does not appear in the top three for any of the other countries, with around a quarter (24%) selecting it for Australia and Japan and one in five (20%) for New Zealand.

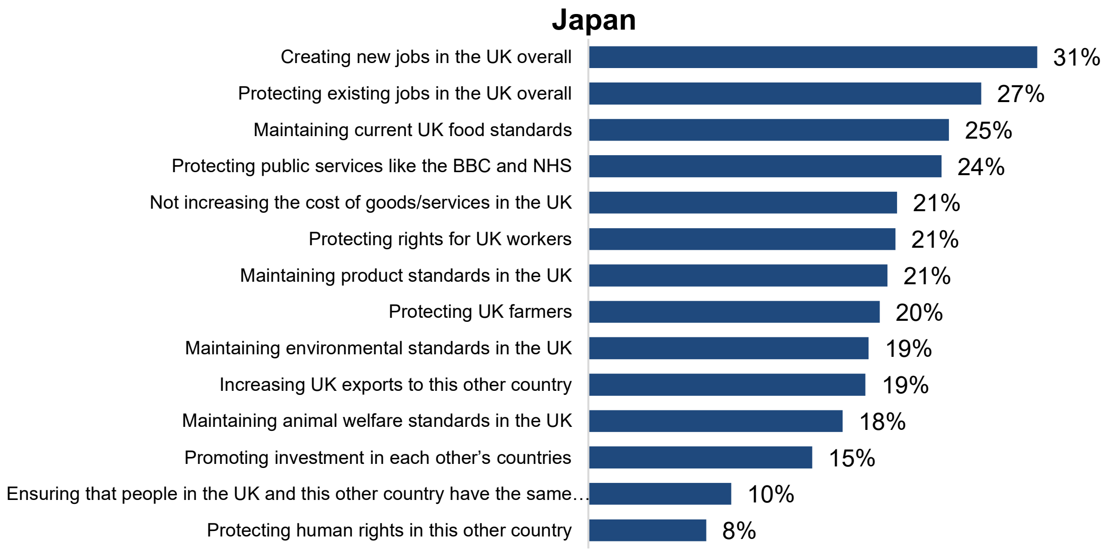
**Figure 27: Top three considerations when negotiating free trade agreements**




TP2c. Please select up to three considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with the following countries?
Multiple response question. Respondents could select up to three options.
Unweighted base sizes: Australia (1,597) New Zealand (1,600) USA (1,602) Japan (1,649). *Japan new to this wave.

**Figure 28: Considerations to be given the highest priority when negotiating free trade agreements**





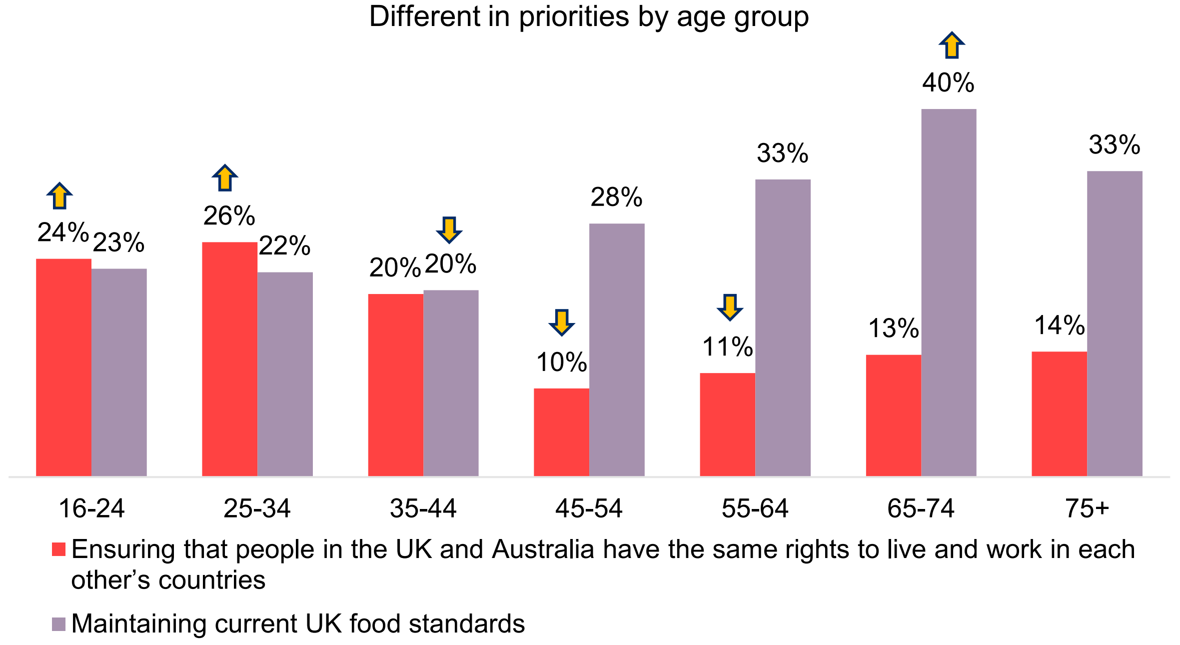

TP2c. Please select up to three considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with the following countries?
Multiple response question. Respondents could select up to three options.
Unweighted base sizes: Australia (1,597) New Zealand (1,600) USA (1,602) Japan (1,649). *Japan new to this wave.

Whilst differences in trade priorities across key demographic subgroups vary between country, they tend to follow a similar pattern. In particular, priorities differ based on the age of respondents.

Younger respondents are generally more likely to prioritise considerations around people's rights. For example: protecting human rights in the trade partner and ensuring that people in the UK and the partner country have the same rights to live and work in each other's countries. On the other hand, older respondents are more likely to consider increasing UK exports or maintaining UK food standards as higher priorities.

Figure 29 shows the differences between respondents of different age groups when considering what they think should be prioritised when negotiating a free trade agreement with Australia. Whilst preferences differ to some degree by country, Australia has been chosen as an example as it is indictive of the four countries. The considerations in Figure 29 have been displayed as they show some of biggest differences by age.

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




TP2c. Please select up to three considerations you think the UK government should be giving the highest priority to when negotiating free trade.
Multiple response question. Respondents could select up to three options.
Unweighted base size: Australia (1,597).
Statistical significance arrows represent significant differences when compared to total.

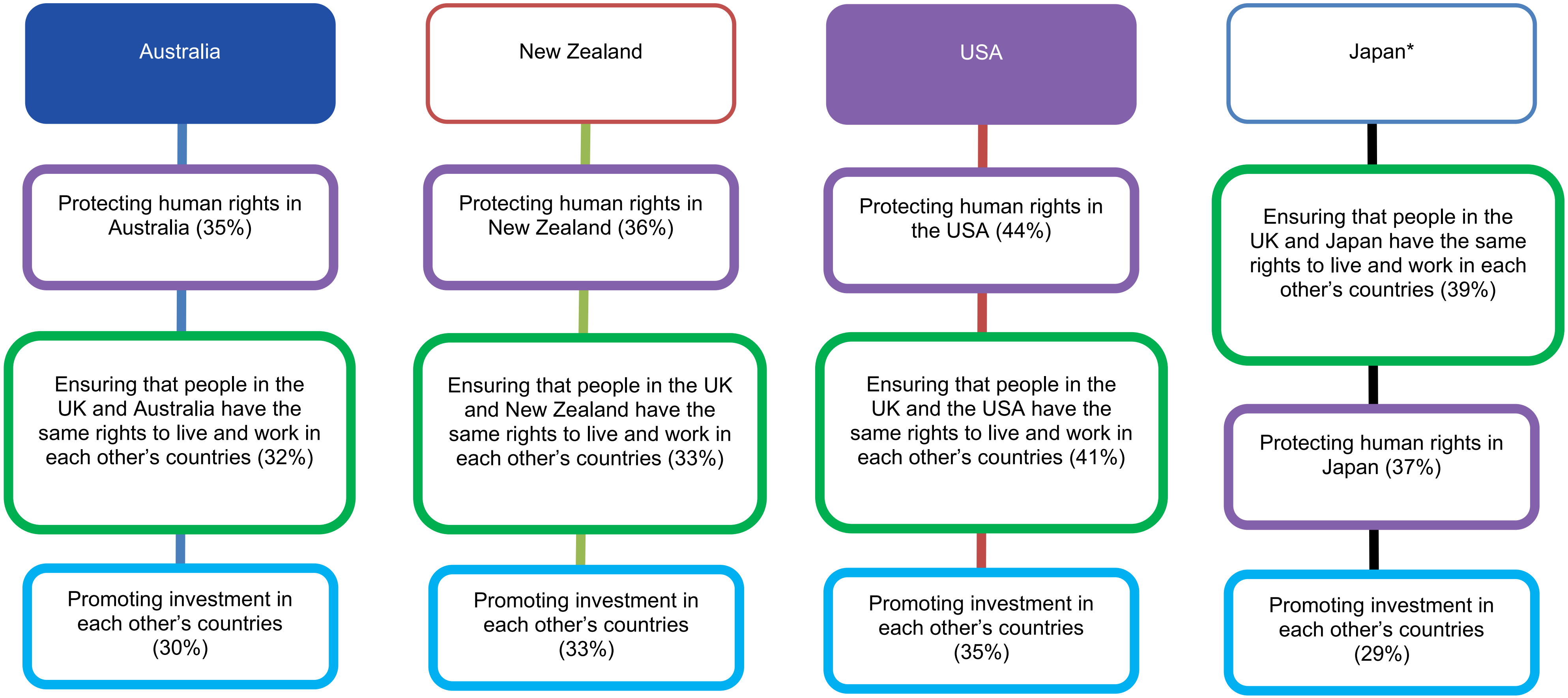
### 6.2.2 Considerations such as promoting investment, equal rights to live and work, and protecting human rights in the trade partner country tend to be lower priorities

Respondents were also asked which three considerations they think the Government should give the lowest priority to when negotiating free trade agreements (see Figure 30). Again, respondents were asked to select from the same list of options, excluding those they had given the highest priority to.

As can be seen in Figure 30, for each of the listed countries three considerations were consistently selected by the majority of respondents as the lowest priorities. These were: promoting investment in each other's countries, ensuring that people in both countries have the same rights to live and work in each other's countries, and protecting human rights in the other country. With the exception of Japan, where it was second lowest priority, protecting human rights in the selected country was considered to be the lowest priority by the largest proportion of respondents.

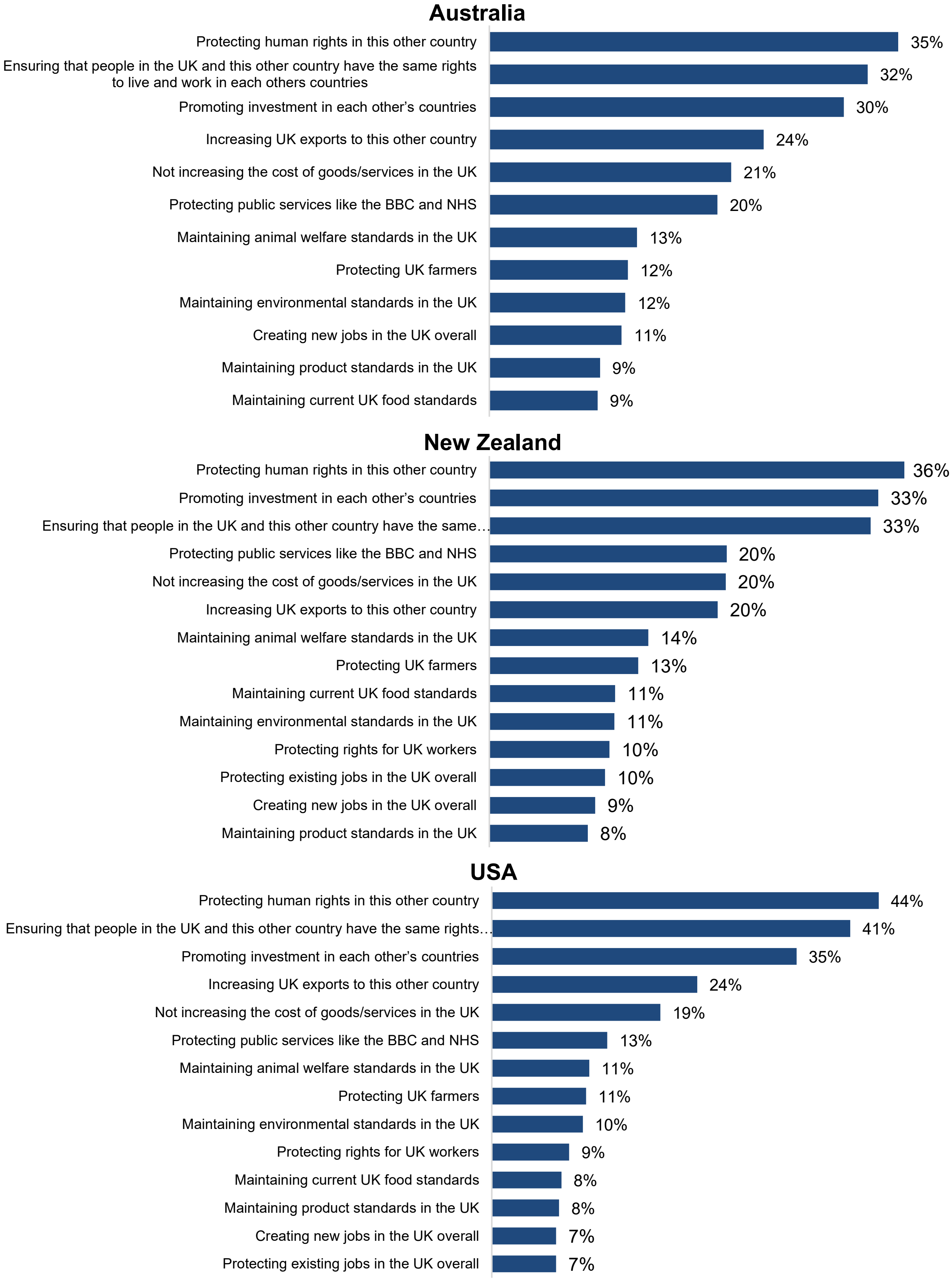
Regarding considerations that should be given least priority, differences by demographic subgroups tend to reflect the differences seen with high priority considerations. For example, whilst younger respondents were more likely to consider protecting human rights in the other country as a high priority, older respondents were significantly more likely to choose it as a low priority.

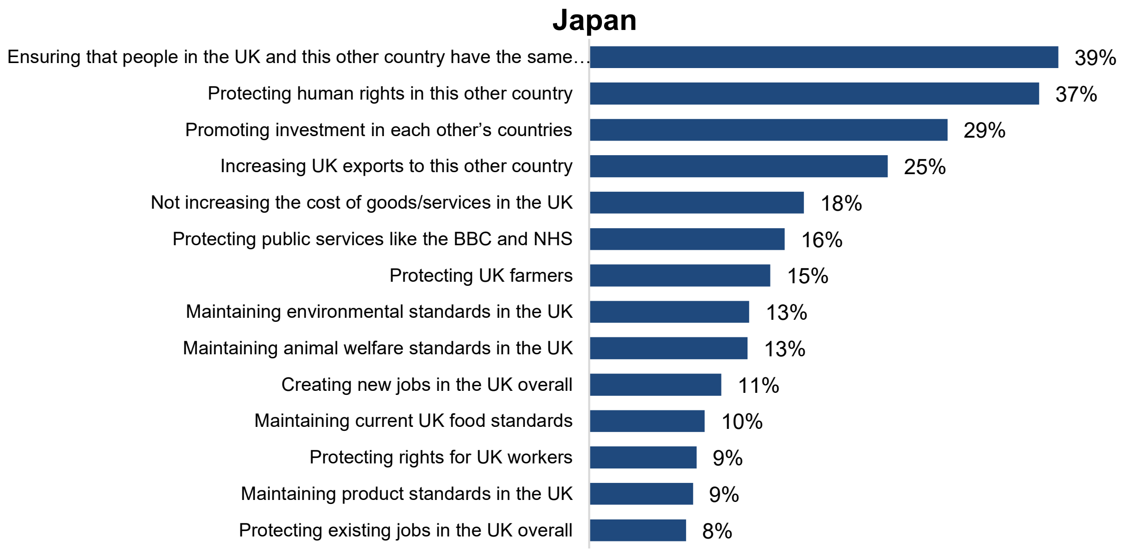
**Figure 30: Considerations to be given the lowest priority when negotiating free trade agreements**




TP2d. 'Please select up to three considerations you think the UK government should be giving the least priority to when negotiating free trade agreements with the following countries?
Multiple response question. Respondents could select up to three options.
Base: Australia (1,597) New Zealand (1,600) USA (1,602) Japan (1,649). *Japan new to this wave

## Figure 31: Considerations to be given the lowest priority when negotiating free trade agreements






'TP2d. 'Please select up to three considerations you think the UK government should be giving the least priority to when negotiating free trade agreements with the following countries?
Multiple response question. Respondents could select up to three options.
Base: Australia (1,597) New Zealand (1,600) USA (1,602) Japan (1,649). *Japan new to this wave.

### 6.2.3 Considerations such as having a stable government, a strong economy, or being culturally similar make many of the countries an appealing trade partner

As well as considerations that the UK government should be prioritising when negotiating free trade arrangements, respondents were asked what considerations make each of the four countries an appealing trade partner.

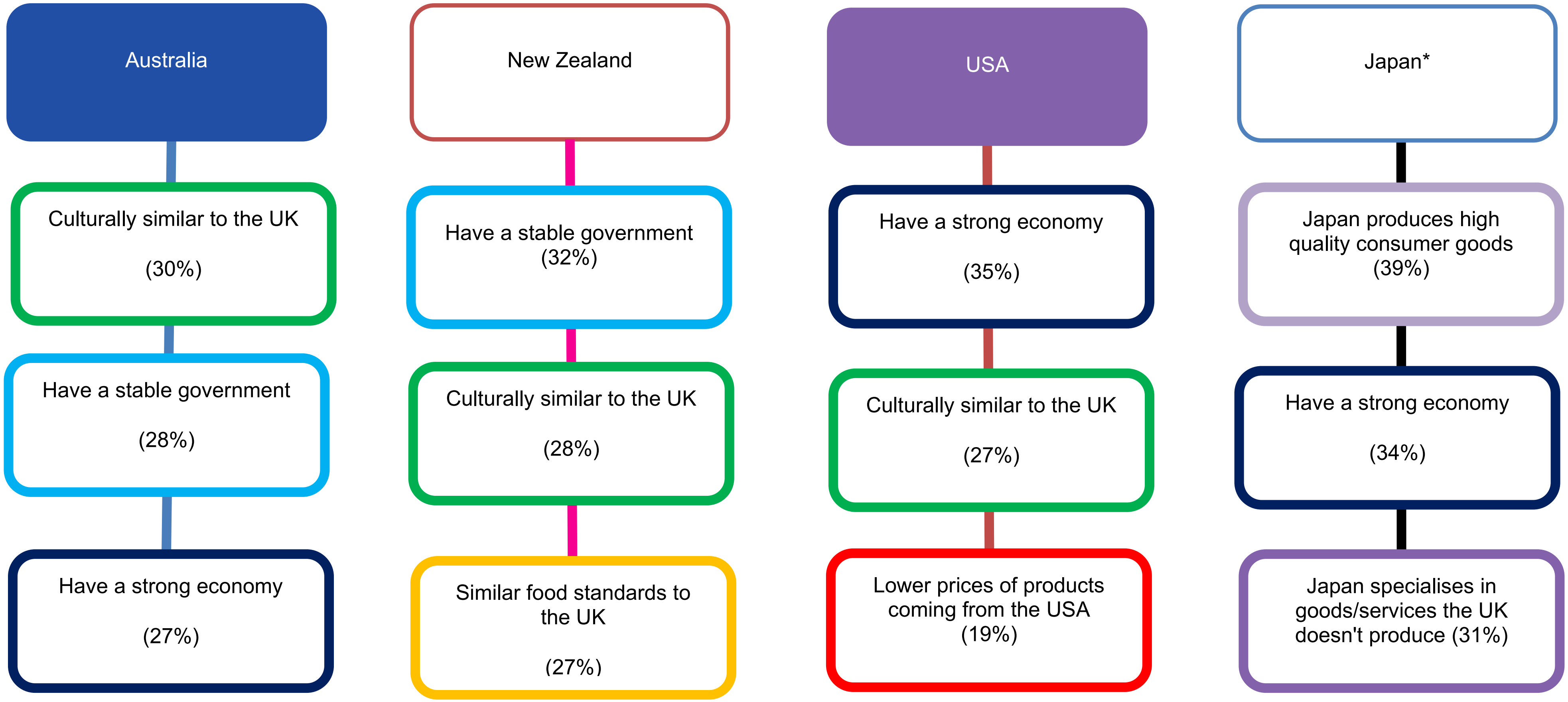
Top considerations varied slightly more by country, but some of the key considerations included: being culturally similar to the UK, having a stable government, and having a strong economy. Key considerations that are specific to each country can be seen in figure 32, and have been described below (with the exception of Australia, where the three more general considerations already listed are the only top considerations):

- New Zealand: Over a quarter (27%) feel that New Zealand having similar food standards to the UK makes it an appealing trade partner. This is the third most popular option for New Zealand

- USA: One in five (19%) say that lower prices of products coming from the USA would make it an appealing trade partner. Again, this is third most chosen consideration for the USA. The USA also had the highest proportion of respondents who answer 'none of the above', chosen by one in five (20%)

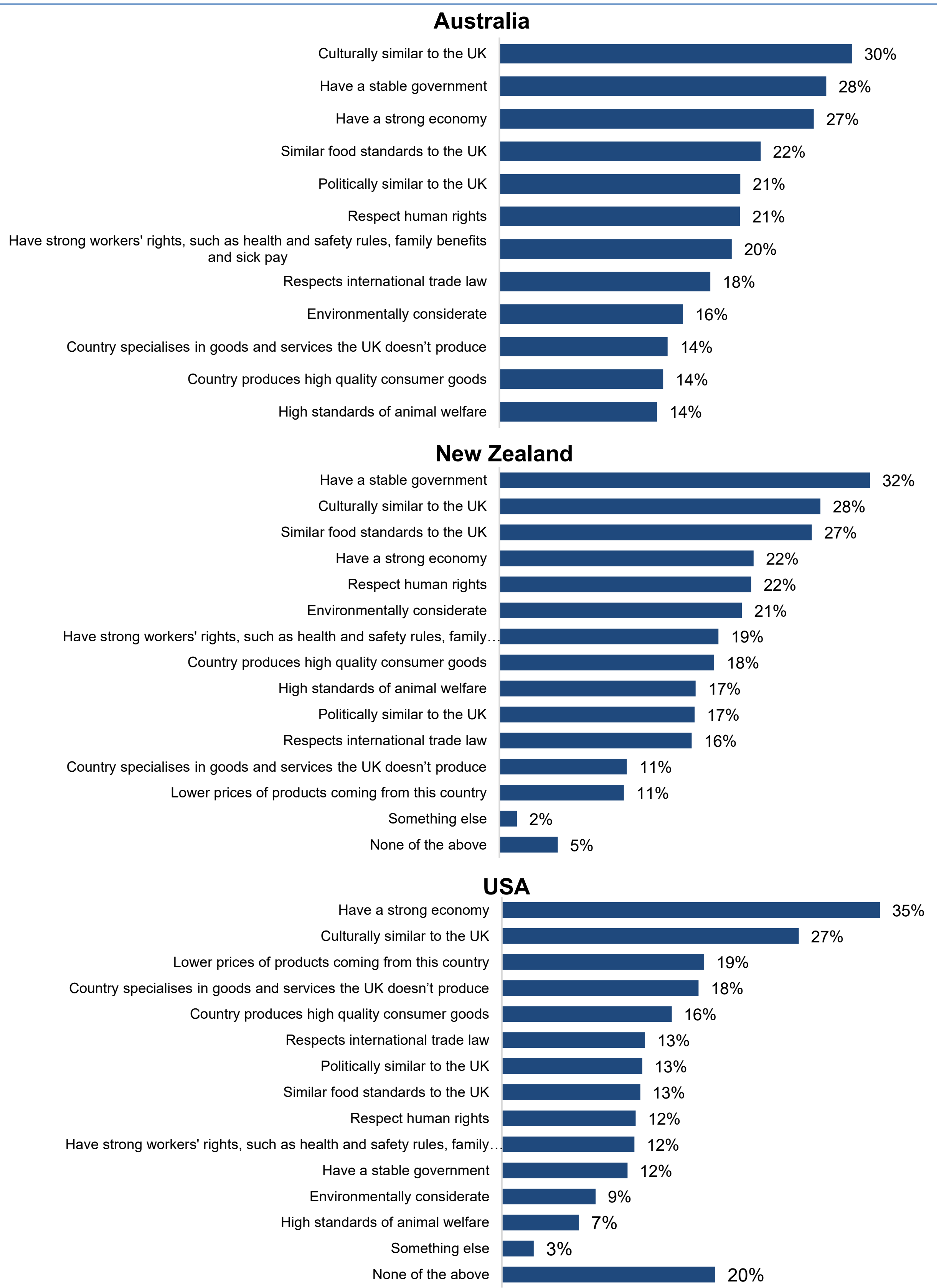
- Japan: Japan differs the most compared to the other countries. The main consideration about Japan is that it produces high quality consumer goods, chosen by two fifths (39%) of respondents. It is also considered to specialise in goods and services that the UK does not produce (31%, third choice)

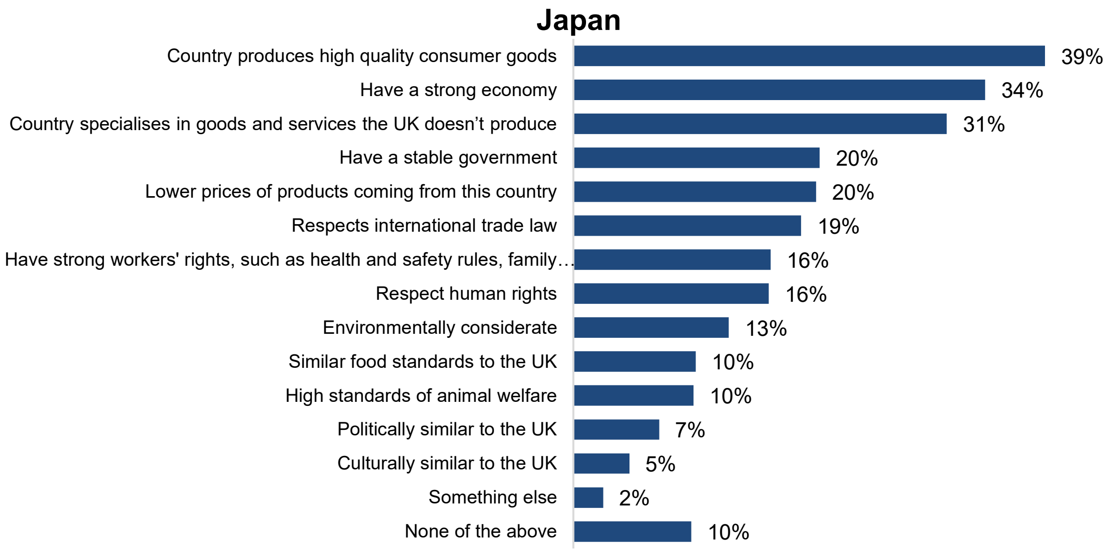
**Figure 32: Top three considerations that make each country an appealing trade partner**




TP2e. Which of these considerations make the following countries an appealing trading partner to you?
Multiple response question. Respondents could select up to three options.
Base: Australia (1,597) New Zealand (1,600) USA (1602) Japan (1,649). *Japan new to this wave

## Figure 33: Considerations that make each country an appealing trade partner






TP2e. Which of these considerations make the following countries an appealing trading partner to you? Multiple response question. Respondents could select up to three options.
Base: Australia (1,597) New Zealand (1,600) USA (1,602) Japan (1,649). *Japan new to this wave

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

In line with wave two, of the countries listed, more respondents continue to say Japan produced good quality consumer goods than any other (60%, down 4 percentage points from wave two). This is detailed in figure 34.

Except for New Zealand, there have been declines across all countries listed in terms of the proportions of saying consumer goods are of good quality. The declines for Japan (minus 4 percentage points) and Australia (minus 3 percentage points) are more minor. Considerable drops are seen in the case of the USA (minus 11 percentage points), China (minus 9 percentage points), and India (minus 7 percentage points).

For the USA, India, and China, the decline in the proportion saying the quality of consumer goods will be good has been matched by a significant increase in the proportions saying each country produces poor quality consumer goods. 14% say the USA (plus 6 percentage points), 38% say China (plus 10 percentage points), and 28% say India (plus 5 percentage points) produces poor quality consumer goods this wave. Notably, in the case of China and India, more now say the country produces poor quality consumer goods than say good.

**Figure 34: Perceptions on the quality of consumer goods by country**

CG. Which of the following best describes your view of the quality of consumer goods from the following countries?
Unweighted base sizes: All respondents (Wave 2 = 2,349, Wave 3 =3,224).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

# 7 Appendix

## 7.1 Regression and correlation analysis

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

Correlation analysis: Correlation analysis is a simpler statistical method used to evaluate the strength of the relationship between two quantitative variables. A high correlation means that two or more variables have a strong relationship with each other, while a weak correlation means that the variables are hardly related. However, correlation analysis does not account for or control for the impact of other potential variables.

## 7.2 SEG classification definitions

| SEG Classification | Description |
|---|---|
| **A** | **Higher managerial / professional / administrative** (for example Established doctor, Solicitor, Board Director in a large organisation (200 and over 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 and over 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**<br>**Housewife / Homemaker**<br>**Retired and living on state pension (that is not private or work-related pension scheme)**<br>**Unemployed or not working due to long-term sickness**<br>**Full-time carer of another household member**<br>**Other** |

## 7.3 Statistical outputs

### 7.3.1 Support for the UK establishing free trade agreements with countries outside of the EU

| Factor | Relative Importance |
|---|---|
| Gender | 3% |
| IMD | 3% |
| Q1A_M1. How the UK trades with countries outside the European Union | 12% |
| Q1A_M2. How the UK trades with countries in the European Union | 7% |
| Protectionist – Group | 22% |
| ECON. Once lockdown restrictions are lifted, do you think the UK economy will be slow or quick to recover from the effects of Covid-19? | 13% |
| CV1. Trade related answers | 8% |

### 7.3.2 Relationship between support for establishing free trade agreement and perceptions as to quality of consumer goods

**USA**

| Source | Relative Importance |
|---|---|
| FT4. Supports Free trade | 45% |
| Covid-19 Economic Recovery | 16% |
| Aware of Negotiating Objectives – USA | 5% |
| Education | 5% |
| Protectionist Groups | 4% |
| Gender | 10% |
| Income (Score: Min Value of Income Bands) | 2% |

**Australia**

| Source | Relative Importance |
|---|---|
| FT4. Supports Free trade | 51% |
| Age | 8% |
| Q1C. How the UK trades with countries outside the European Union | 6% |
| SEG | 5% |
| IMD | 4% |
| Covid-19 Economic Recovery | 2% |
| Protectionist Groups | 11% |
| Q1A_M1. How the UK trades with countries outside the European Union | 3% |
| Gender | 1% |

## New Zealand

| Source | Relative Importance |
|---|---|
| FT4. Supports Freetrade | 47% |
| Age | 12% |
| Q1C. How the UK trades with countries outside the European Union | 9% |
| SEG | 6% |
| Q1A.  How the UK trades with countries in the European Union | 4% |
| Protectionist Groups | 11% |
| Gender | 1% |

## China

| Source | Relative Importance |
|---|---|
| FT4. Supports Free trade | 27% |
| Gender | 10% |
| Protectionist Groups | 29% |
| Age | 9% |
| Covid-19 Economic Recovery | 6% |
| SEG | 2% |
| Q1C. How the UK trades with countries outside the European Union | 3% |
| Q1C. How the UK trades with countries in the European Union | 4% |
| Q1A. How the UK trades with countries outside the European Union | 5% |

## India

| Source | Relative Importance |
|---|---|
| FT4. Supports Free trade | 64% |
| Covid-19 Economic Recovery | 14% |
| Protectionist Groups | 8% |
| SEG | 6% |
| Gender | 7% |

## 7.4 Statement of terms

### 7.4.1 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).

### 7.4.2 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 will not publish any part of these results without the written and informed consent of the client.

### 7.4.3 Ethical practice

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

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

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

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



Any enquiries regarding this publication should be sent to us at

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