Department for International Trade

Public Attitudes to Trade Tracker

Wave 5 report

Prepared for the Department for International Trade

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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 fifth wave of the tracker.

The first baseline wave was conducted between November 2018 and January 2019. Wave 2 was held between June and August 2019, the third wave between June and August 2020 and fourth wave between March and May 2021. Fieldwork for wave 5 took place between 25 October 2021 and 4 January 2022.

Waves 1 and 2 of the DIT Public Attitudes to Trade Tracker (PATT) combined push-to-web invites with a face-to-face administered Computer-Assisted Self-Interviewing (CASI) approach. Due to the COVID-19 outbreak, the face-to-face CASI fieldwork element for waves 3, 4 and 5 was unable to go ahead as originally planned. A new methodology combining push-to-web and online panel interviews was introduced, with the push-to-web sample size increased. This was 64% of the final sample at wave 5, 74% of the final sample at wave 4 and 73% at wave 3. The introduction of the online panel approach helped to ensure a more representative sample with more scope for sub-group analysis[1].

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

This executive summary sets out key findings for wave 5 as well as an outline of changes compared to the previous wave.

2.2 Overview of key findings

Public attitudes at wave 5 are more similar to those observed at waves 1 to 3, rather than a continuation of changes seen in wave 4. Some changes seen in the fourth wave do persist into the wave 5 data. However, many of these changes this wave represent a return to attitudes similar to those seen in previous waves.

Support for Free Trade Agreements (FTAs) has fallen back slightly compared with the previous wave. After a significant increase last wave, support for establishing FTAs with countries outside the EU has fallen back in line with the first 3 waves. However, this is explained by an increase in the proportion of 'don't knows' rather than a rise in opposition.

There is a mixed picture on the impact of trade. There has been a rise in the proportion believing that free trade will lead to higher wages. Views around the impact on jobs remain stable. Conversely, views around changing quality of available products have become more negative, returning to levels seen in wave 3. When looking at the public's

[1] Please note that in each wave a small number of telephone interviews were also conducted due to accessibility issues. This accounts for 15 interviews at wave 5.

trade values, based on their responses to attitudinal questions, we also see a small rise in protectionist sentiment. However, this does not tend to have resulted in a corresponding decline in those taking liberal views.

Support for new deals with most countries has remained stable but support for enhancing existing free trade deals has declined for most countries. Support for FTAs with New Zealand, the United States of America (USA), India, United Arab Emirates (UAE), and Saudi Arabia have all remained in line with wave 4. Only China and Brazil have seen small declines. For China, the decrease in support has not resulted in an increase in opposition. However, for Brazil, the decline in support has been accompanied by an increase in opposition. After declining between waves 1 to 4, support for a deal with India has also stabilised. Support for enhancing the existing trade deals with Canada, Singapore and Vietnam has also declined. Mexico is the only country for which levels of support have remained stable. These declines in support have been accompanied by higher proportions of don't knows rather than by increases in opposition.

The deal between the UK and Australia is the most well-known trade story. The proportion who have seen or heard something about how the UK trades with other countries has risen. The UK-Australia agreement in principle is the most salient trade-related story by some distance. The agreement in principle and later signature of the deal was a major strand of activity for the department during the wave 5 fieldwork period. These activities were promoted in departmental communications.

A larger proportion of the UK public are voicing key concerns. Alongside a slight rise in the proportion of the public considering the impact of increased free trade to be negative, greater proportions highlighted various concerns. These include the impact on key industries (including agriculture and manufacturing), and criticisms around environmental damage. Those positive about the impact of increased free trade are more likely to say it will provide a greater choice of goods. They are also more likely to mention that increased free trade allows greater freedom of movement compared to wave 4.

Changes come against a backdrop of increasing economic pessimism**.** A larger proportion of the public now believe the economy will worsen over the next 12 months than say it will get better. This is a reversal from wave 4 when more people believed the economy would improve in the next year. As in previous waves, the way people feel about the economy continues to relate to how they feel about trade more broadly. This may go some way to explaining the negative movement on some measures.

2.3 What has not changed?

2.3.1 Interest, Knowledge & Awareness

Interest in trade remains high although it has declined since the previous wave. Interest in other areas also continues to decline. Interest in how the UK trades with other countries has declined, as has interest in the UK economy, the UK's approach to environmental issues and UK foreign affairs. Just over two thirds are interested in how the UK trades with other countries both inside and outside the EU.

Self-reported knowledge remains consistent. Lower proportions of the public feel knowledgeable about how the UK trades with other countries than say they are interested. Levels of self-reported knowledge are in line with wave 4.

2.3.2 Support & Impact

There is a consistent picture on why trade has a positive impact. Themes around improved opportunities are among the main reasons for thinking free trade will have a positive impact on the UK. Other reasons include a belief that free trade is generally good for the economy and that trade will lead to more choice and lower prices.

Views on the impact of increased free trade on jobs are stable. There have been shifts in perceptions around quality of goods and wages. However, the proportion saying free trade would lead to more jobs in the UK overall and their local area has not changed since wave 4.

2.3.3 Trading Partners, Characteristics & Considerations

Support for deals with most countries of interest remains stable. Support for FTAs with the USA, New Zealand, UAE, and Saudi Arabia has remained in line with wave 4. After declining at wave 4, support for a deal with India has stabilised.

2.4 What has changed?

2.4.1 Interest, Knowledge & Awareness

Trade stories are cutting through. The proportion who have seen or heard something about how the UK trades with other countries has risen. Just over 2 in 5 report having seen or heard something in the previous week. This represents a higher proportion than in any wave since wave 1.

2.4.2 Support & Impact

Support for FTAs has fallen back slightly. After a significant increase last wave, support for establishing FTAs with countries outside the EU has fallen back in line with the first 3 waves. However, this is explained by an increase in the proportion of “don’t knows” and *not* a rise in opposition.

Lower proportions are positive about the impact of non-EU trade on the UK overall. Views around the impact of the UK signing FTAs with countries outside the EU on the UK have become slightly more negative since wave 4. The proportion positive about the impact on their daily life remained stable, although a smaller proportion feel there will be a positive impact on themselves than on the UK overall.

A greater proportion of the UK public are voicing concerns around the impact of trade on key industries, the environment and quality. An increasing proportion of those negative about free trade cite an array of concerns including the impact on key industries (incl. agriculture and manufacturing). Criticisms around the environmental damage and a perceived detrimental impact on the quality of goods and standards (incl. food) are also more prominent this wave. A more general lack of trust in government is also more commonly mentioned at wave 5 compared to wave 4. A desire for the UK to remain in the EU is also more commonly mentioned at wave 5.

A greater proportion now believe the economy will worsen over the next 12 months than say it will get better. As in previous waves, the way the public feel about the economy continues to relate to how they feel about trade more broadly. Declining optimism about the economy may go some way to explaining the negative movement on some measures.

Views around quality have become more negative. After declining at wave 4, an increased proportion now say the quality of goods and services would be lower following increased free trade. This is back close to the levels seen in wave 3.

A growing proportion feel that free trade would lead to higher wages**.** For the second wave in a row, there has been an increase in the proportion who feel free trade would lead to higher wages. This is true both when asked about the UK generally and the local area. Around a third now believe that free trade will lead to higher wages across the UK, compared to the previous wave. A quarter say so when asked about the local area.

Awareness of the CPTPP has dipped. The public are less likely to say that they are aware of the CPTPP than they were in wave 4. Among those who have heard a little about the CPTTP, support has declined slightly.

2.4.3 Trading Partners, Characteristics & Considerations

There has been a small decline in support for deals with China and Brazil. Support for an FTA with China has decreased slightly compared to wave 4, as has support for a trade deal with Brazil. China and Brazil are the exceptions rather than the rule and support for deals with all other countries remains stable. Opposition for an FTA with China has not increased and is in line with wave 4. Instead, there have been non-significant increases in the proportions who are opposed, don't know and neither support nor oppose. In contrast, for Brazil, the decline in support has been accompanied by an increase in opposition.

Support for enhancing existing agreements has declined. Support for enhancing the existing trade deals with Canada, Singapore and Vietnam have also declined, with Mexico the only country to see remain stable. Opposition for enhancing the existing trade deals with Canada, Singapore and Vietnam has not increased, instead it's the proportion who are unsure that has grown.

2.5 What is new?

2.5.1 Interest, Knowledge & Awareness

News is overwhelmingly where people are hearing about trade. Most of those who have seen/heard anything in the prior week about how the UK trades with other countries did so on the news. This is followed by social media, friends and family. Fewer say they had heard something from DIT. However, nearly 3 in 10 say they would use DIT as a source if they wanted to find out more.

Awareness of the UK-Australia agreement in principle is relatively high. The UK and Australia agreeing on the core elements of a free trade deal was the trade-related story with the greatest recall. It had much higher awareness than the Japan deal in wave 4. Lower proportions heard about other trade stories such as the UK and the USA pausing negotiations, or the agreement in principle with New Zealand.

2.5.2 Support & Impact

Knowledge of the Gulf Cooperation Council, and support for the UK entering into formal trade talks with the GCC, are low. Most (63%) haven't heard about the GCC and 15% have heard the name but know nothing about it. 22% know at least a little about the

GCC. Levels of support and opposition to the UK entering into formal trade talks with the GCC are low (28% support this and 22% are opposed). These questions were newly asked at wave 5.

Awareness of the WTO is high as is agreement that the UK should take a leading role within this organisation. Also new to wave 5, 61% know at least a little about the WTO and just 16% say they have never heard of this organisation. Around 2 in 3 (63%) agree the UK should take a leading role within the WTO.

Compliance with international trade rules and protecting the environment are considered the highest priorities for the WTO when setting new rules for international trade. One of the top priorities for the WTO when setting new rules for international trade is ensuring all countries follow international trade rules (41%). This is followed by protecting the environment (40%). In contrast, buying and selling online (including e-commerce and digital trade) come at the bottom of the list in terms of priorities (13%). This question was newly asked at wave 5.

2.5.3 Trading Partners, Characteristics & Considerations

High priorities change depending on the country in question. Maintaining food standards is the highest priority when negotiating free trade deals with USA, India and Mexico. Food standards are an important consideration for UAE and Saudi Arabia. However, protecting human rights and equality is the highest priority consideration for trading with these 2 countries.

There is consistency on low priorities. There are high levels of consistency across USA, India, UAE, Saudi Arabia, and Mexico as to which considerations should be given the least priority. These include: making it easier and cheaper to buy online from businesses in the partner country. The other 2 lowest priorities are: equal rights to live and work in each other's country, and promoting investment in each other's country.

Public opinion is divided over the importance of human rights when making decisions around trade. Newly asked this wave, a third (36%) of UK adults think the UK should only have trading relationships with like-minded countries. This compares to 22% who take the opposite view, and a further 31% sit somewhere in the middle.

3 Background and methodology

3.1 Background, context and research objectives

The Department for International Trade (DIT) set out an ambitious set of trade and investment objectives in the 2021 Spending Review, focused on achieving 4 priority outcomes:

- secure world-class free trade agreements and reduce market access barriers, ensuring that consumers and businesses can benefit from both
- encourage economic growth and a green industrial revolution across all parts of the UK through attracting and retaining inward investment
- support UK business to take full advantage of trade opportunities, including those arising from delivering Free Trade Agreements, facilitating UK exports
- champion the rules-based international trading system and operate the UK's new trading system, including protecting UK businesses from unfair trade practices

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

In September 2018, DIT commissioned the first wave of a nationally representative survey of the UK public to examine public attitudes towards trade and to understand the public's priorities as they relate to trade policy. Waves 2, 3, 4 and now 5 have enabled DIT to track shifts in sentiment over time.

Fieldwork for wave 5 was conducted between 25 October 2021 and 4 January 2022. The first wave to be conducted after the end of the transition period. The first wave, which set the baseline for the study, concluded in January 2019. Wave 2 finished in August 2019, wave 3 was completed in August 2020, and wave 4 finished in May 2021. Final reports for waves 1, 2, 3 and 4 have been published by DIT[2].

3.2 Overview of methodology

3.2.1 Overview of methodological changes at wave 3, 4 and 5[3]

Readers should treat comparisons of waves 3, 4 and 5 with data from waves 1 and 2 with additional caution. Caution should always be exercised when tracking survey data, but

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[2] For wave 1, please see: https://www.gov.uk/government/publications/public-attitudes-to-trade-tracker-wave-1
For wave 2, please see: https://www.gov.uk/government/publications/public-attitudes-to-trade-tracker-patt-wave-2
For wave 3, please see: https://www.gov.uk/government/publications/public-attitudes-to-trade-tracker-patt-wave-3
For wave 4, please see: https://www.gov.uk/government/publications/public-attitudes-to-trade-tracker-patt-wave-4
[3] For a more detailed overview of the methodology used at wave 5, please see the technical report available at: https://www.gov.uk/government/collections/public-attitudes-to-trade-tracker

extra caution should be taken in this instance due to the methodological changes that were introduced in wave 3, following the COVID-19 outbreak.

Waves 1 and 2 of the DIT PATT combined push-to-web invites with a face-to-face administered Computer-Assisted Self-Interviewing (CASI) approach. Each element comprised roughly 50% of the achieved sample. Due to the COVID-19 outbreak, the face-to-face CASI fieldwork element for wave 3 was unable to go ahead as originally planned, with a new methodology introduced and replicated again at waves 4 and 5.

As a result, the push-to-web sample size was increased (64% of the final sample at wave 5, 74% at wave 4 and 73% at wave 3). Online panel interviews were used to supplement the push-to-web approach to ensure a more representative sample with more scope for sub-group analysis[4].

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

Table 1: Sample composition by wave

Wave	Push-to-web	CASI	Online Panel	Total
1	1,149	1,251	N/A	2,400
2	1,130	1,219	N/A	2,349
3	2,374	N/A	850	3,224
4	2,953	N/A	1,036	4,009
5	1,907	N/A	1,082	2,989

3.2.2 Push-to-web and online panel overview

Context

Due to the COVID-19 outbreak, the face-to-face fieldwork element from wave 3 was Given unable to go ahead as originally planned. The continuing COVID-19 pandemic and associated social distancing guidelines, this approach was maintained in waves 4 and 5. In wave 4, 74% of the final sample was achieved via push-to-web and 26% via online panel. In wave 5, 64% of the final sample was achieved via push-to-web and 36% via online panels.

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,

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[4] Please note that in each wave a small number of telephone interviews were also conducted due to accessibility issues. This accounts for 15 interviews at wave 5.

double the number sampled at waves 1 and 2 and identical to that sent out at waves 3 and 4. 1,907 respondents completed the survey, representing a response rate of 16%.

This is lower than the push-to-web response rates since the methodology was changed from wave 3: 25% at wave 4 and 20% at wave 3.

It should be noted, however, that compared to waves 3 and 4, at the time of wave 5 fieldwork, most COVID-19 restrictions had been lifted. Therefore, respondents were more likely to have been able to socialise and resume other activities thus having less free time to fill in the survey. This applies to most of the fieldwork period, although it should be noted that in mid-December, towards the end of the wave 5 fieldwork period, the work from home advice was reinstated following the COVID-19 Omicron variant.

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

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

Online panel interviews

Alongside the push-to-web approach, BMG conducted 1,082 of the target interviews via online panel interviews (36% 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[5].

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

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

3.2.3 Weighting

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

- age
- gender
- Government Office Region
- Indices of Multiple Deprivation (IMD)
- 2016 EU referendum vote
- education level[6]

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

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

Table 2: Total combined completes

Region	Wave 1 Unweighted	Wave 2 Unweighted	Wave 3 Unweighted	Wave 4 Unweighted	Wave 5 Unweighted	Wave 1 Weighted	Wave 2 Weighted	Wave 3 Weighted	Wave 4 Weighted	Wave 5 Weighted
England	1,819	1,747	2,410	3,102	2,302	2,017	1,973	2,708	3,368	2,511
Scotland	202	202	302	316	241	202	198	272	338	252
Wales	213	203	282	294	242	115	113	155	192	144
Northern Ireland	166	197	230	297	204	66	65	89	111	83
Total	2,400	2,349	3,224	4,009	2,989	2,400	2,349	3,224	4,009	2,989

3.2.4 Questionnaire design

Following considerable work developing the questionnaire in advance of wave 1, 2, 3 and 4, most of the questions at wave 5 remained identical, with a similar order and structure so as to minimise potential order effects[7]. This allows for the majority of questions to be

[6] A new addition at wave 3 and continued at wave 4 and 5. For more detail on why this was introduced, please see technical report for wave 4 available at: https://www.gov.uk/government/collections/public-attitudes-to-trade-tracker

[7] 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

tracked across multiple waves, to see how responses have changed over time. However, a number of additions and changes were made at wave 5, including:

- a question asking about the sources through which respondents had heard stories or news about trade
- questions about awareness of the Gulf Cooperation Council and support for entering formal trade talks
- questions about awareness of the World Trade Organisation and UK's role within it
- a values-based question asking about the importance of human rights when choosing trading partners
- in some instances, while the questions remain the same, specific response options have changed to reflect emerging priorities

As was the case with previous waves, BMG conducted a round of cognitive testing with members of the public in order to review the question wording and structure of new or substantially altered questions[8]. Upon review of themes emerging from the cognitive interviews, small textual changes were made before a final draft of the questionnaire was agreed.

3.2.5 Fieldwork

Fieldwork was conducted between 25 October 2021 and 4 January 2022. There were several notable events taking place prior to and during the fieldwork period, including:

- the ongoing COVID-19 vaccines rollout (from December 2021);
- the UN Climate Change Conference COP 26 held in Glasgow from 31 October to 12 November 2021;
- and Government advice for the UK public to work from home where possible being reinstated in December 2021 following the COVID-19 Omicron variant.

Other events which could have impacted perceptions of trade are also worth noting: these took place either before or during the wave 5 fieldwork period. These include:

- the 14-week consultation to prepare for a trade deal with the Gulf Cooperation Council stating (8 October 2021)
- the UK reaching an agreement in principle with New Zealand (20 October 2021)
- 67 WTO members, including the UK, delivering an agreement on Services Domestic Regulation (2 December 2021)
- the UK reaching an agreement in principle with Singapore on a Digital Economy Agreement (9 December 2021)
- the UK and Australia sign a free trade agreement (16 December 2021)

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

3.3 Contents and structure of report

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

1. Interest, knowledge and engagement: firstly, the report examines respondents' interest in the subject of trade, their knowledge of trade-related issues, and how these compare to the results observed at previous waves. The report also examines levels of engagement by exploring what trade-related news stories respondents reported seeing or hearing.
2. Support for free trade agreements and their perceived impact: next, the report explores levels of support for free trade agreements more generally, as well as support for inward investment. This section also examines awareness of and support for the CPTPP and the GCC and looks at awareness of and priorities for the WTO. It also examines the extent to which respondents hold views typically understood or described as 'protectionist'.
3. Trade partner preferences: lastly, the report examines levels of support for trade agreements and how these have changed over time. This section also includes analysis of the traits that respondents view as important for potential trading partners to possess with respect to specific countries of interest.

3.4 Presentation of results

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

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

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

Sample: the sample was designed to be representative of the UK public. This report makes reference to 'respondents'. However, findings can be considered to be indicative of the wider UK public's views.

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

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

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

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

Unless specified, all statistics are compared against the total.

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

The report focuses on where statistically significant differences have been identified. Where differences between waves are discussed during the commentary, these differences can all be presumed to be statistically significant unless otherwise noted[9].

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[10].

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

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

4 Interest, knowledge and engagement

4.1 Background

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

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

It should be noted that responses to questions designed to measure interest and engagement around a subject, particularly those that relate to politics, are often influenced by social desirability bias[11]. It may be considered desirable to be seen as interested or knowledgeable on topical issues and current affairs. Consequently, it is possible that respondents may overstate their interest or knowledge of such issues when responding to survey questions. The results discussed below should, therefore, be treated with this cautionary note in mind. Nonetheless, it is worth noting that some of this effect is designed to be ameliorated by the self-completion method chosen for this survey, which removes the social pressure of an interviewer.

4.2 Interest in trade

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

4.2.1 Interest in how the UK trades with other countries has declined, as have all other areas tested.

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 European Union (EU) countries and non-EU countries. This is consistent with the approach in previous waves. This featured alongside a list of other topics of potential public interest: the UK economy, the UK’s approach to environmental issues, and UK foreign affairs.

A total of 68% of respondents said they felt interested in how the UK trades with countries inside the European Union, and the same proportion (68%) said they were interested in how the UK trades with countries outside the European Union. This includes close to a quarter of respondents who stated they are ‘very interested’ in how the UK trades with countries both inside (23%) and outside the EU (24%).

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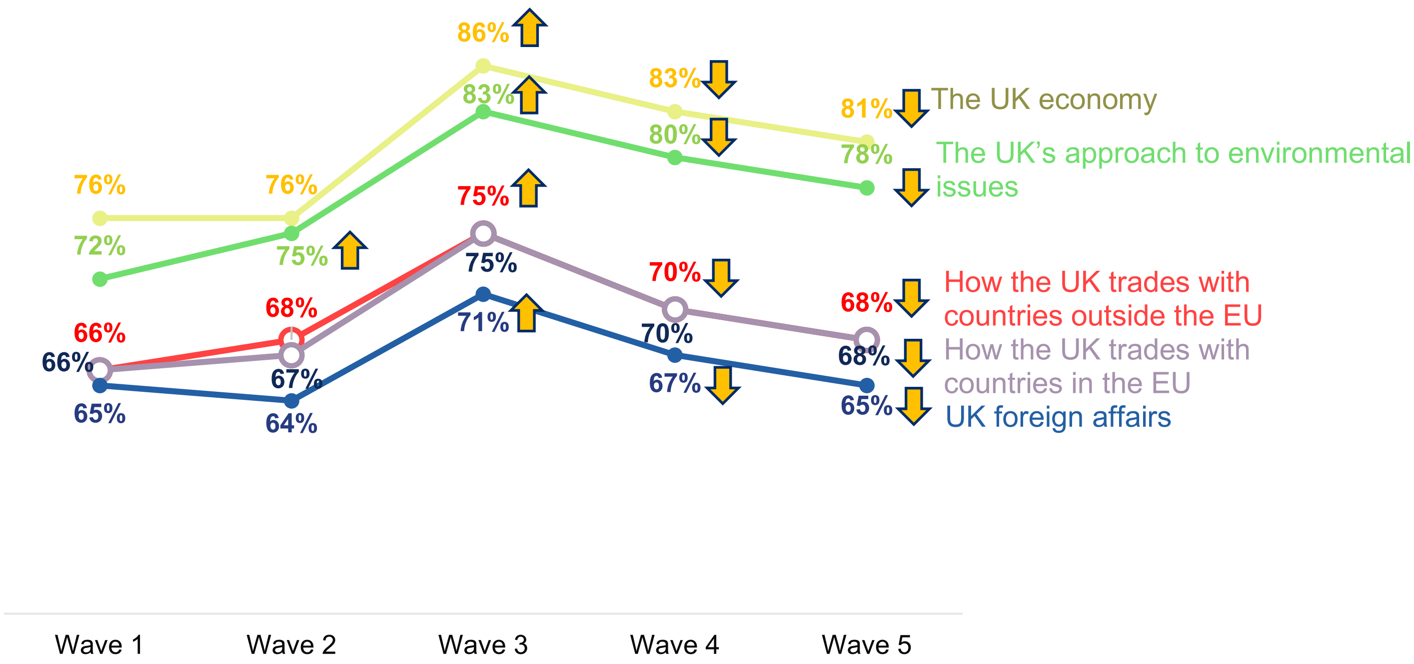
[11] For more information on effects of social desirability bias and associated effects on survey questions, see Krumpal, I. (2013) *‘Determinants of social desirability bias in sensitive surveys: a literature review’*, available here: https://link.springer.com/article/10.1007/s11135-011-9640-9

As Figure 1 illustrates, overall levels of interest in how the UK trades with countries in and outside of the EU have declined by 2 percentage points, as have levels of interest in each of the other topics, continuing a downward trend since wave 3.

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



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

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

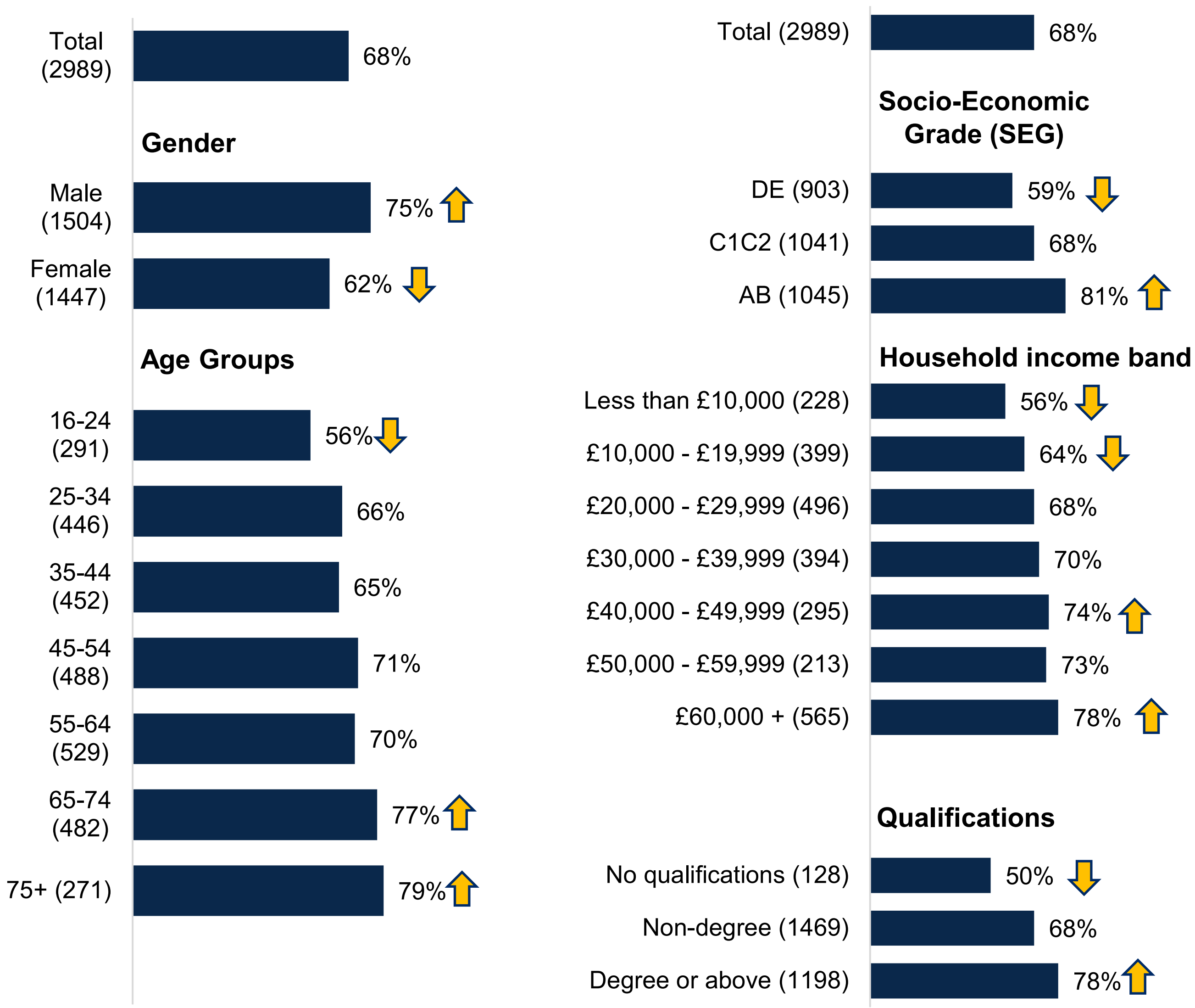
By analysing responses across demographic groups, consistent patterns emerge in terms of the groups more likely to report being interested in how the UK trades with countries outside the EU. Figure 2 below charts interest levels among demographic groups on the question of interest in how the UK trades with countries outside the EU[12].

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

- are in higher socio-economic grades (SEG): 81% of those in SEG classifications AB say they are either very or fairly interested. This compares to 59% in SEG DE classification[13]
- are older: respondents in older age groups are more likely to report being interested, while the opposite is true of those aged under 24. Of those aged 16 to 24, 56% say they are interested. This compares to 77% of those aged 65 to 74 and 79% of those aged 75 and over
- have obtained degree level qualifications: 78% of those with at least an undergraduate degree level of education report being interested, which compares to 50% of those with no qualifications
- are men: by a margin of 13 percentage points, men (75%) are significantly more likely than women (62%) to report being interested[14]

[12] 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.
[13] More detail on SEG classifications is provided in the appendix.
[14] Gender differences in interest levels with respect to political issues is a common phenomenon within survey research. See, for example: Coffe, H. (2013) *‘Women Stay Local, Men Go National and Global? Gender Differences in Political Interest’*, available at: https://link.springer.com/article/10.1007/s11199-013-0308-x

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



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

4.3 Knowledge of free trade

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

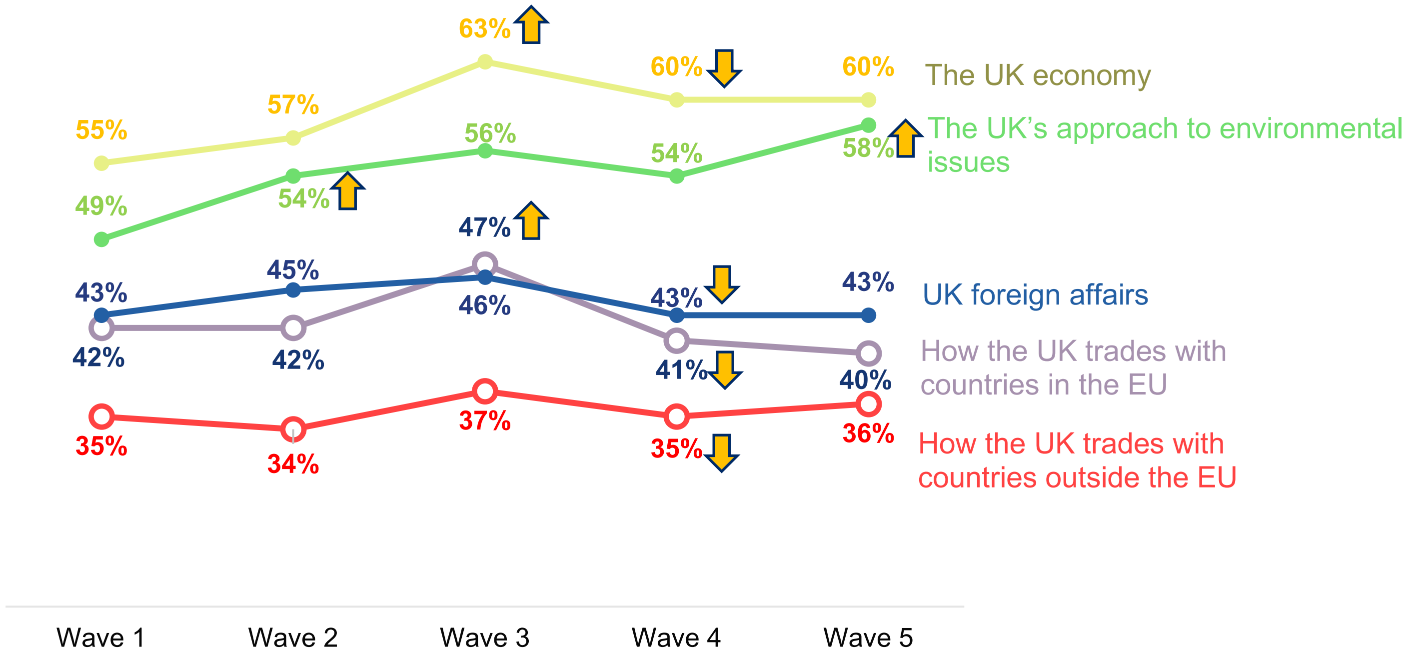
4.3.1 Self-reported knowledge levels of how the UK trades with countries both in and outside the European Union also remain stable.

While around 7 in 10 indicate that they are interested in how the UK trades with other countries (68% are interested both in how the UK trades with countries outside of the EU and how the UK trades with countries in the EU), only a minority say they feel knowledgeable (see Figure 3). The results, therefore, continue to indicate a “knowledge gap” between levels of interest and levels of knowledge.

Around 1 in 3 (36%) respondents said they feel knowledgeable about how the UK trades with countries outside the EU (versus 35% at wave 4). Slightly more respondents say they feel knowledgeable about how the UK trades with countries in the European Union (40%, versus 41% at wave 4). Both figures are in line with results reported at waves 4, 2 and 1.

This continues to be lower than the proportion who say they feel knowledgeable about the UK economy and the UK’s approach to environmental issues (60% and 58% respectively), with the latter representing a significant uplift of 4 percentage points on wave 4. However, as at waves 3 and 4, the proportion who feel knowledgeable about how the UK trades with countries in the European Union is in line with the proportion who feel knowledgeable about UK foreign affairs (40% and 43% respectively).

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



IK2. How knowledgeable would you say you currently are about ...?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989)
Statistical significance arrows represent significant differences when compared to results observed at knowledgeable previous wave.

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

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

Figure 4, below, charts interest levels among key groups on the question of how knowledgeable they feel about how the UK trades with countries outside the EU[15].

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 (49%), far higher than the rate of those in SEG classifications DE (28%)
- have obtained degree level qualifications: there continues to be a significant gap between those who have obtained a degree or above level qualifications (43%) and those who have no qualifications (20%)
- are men: the gender gap also persists: men (47%) are much more likely than women (25%) 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[16]

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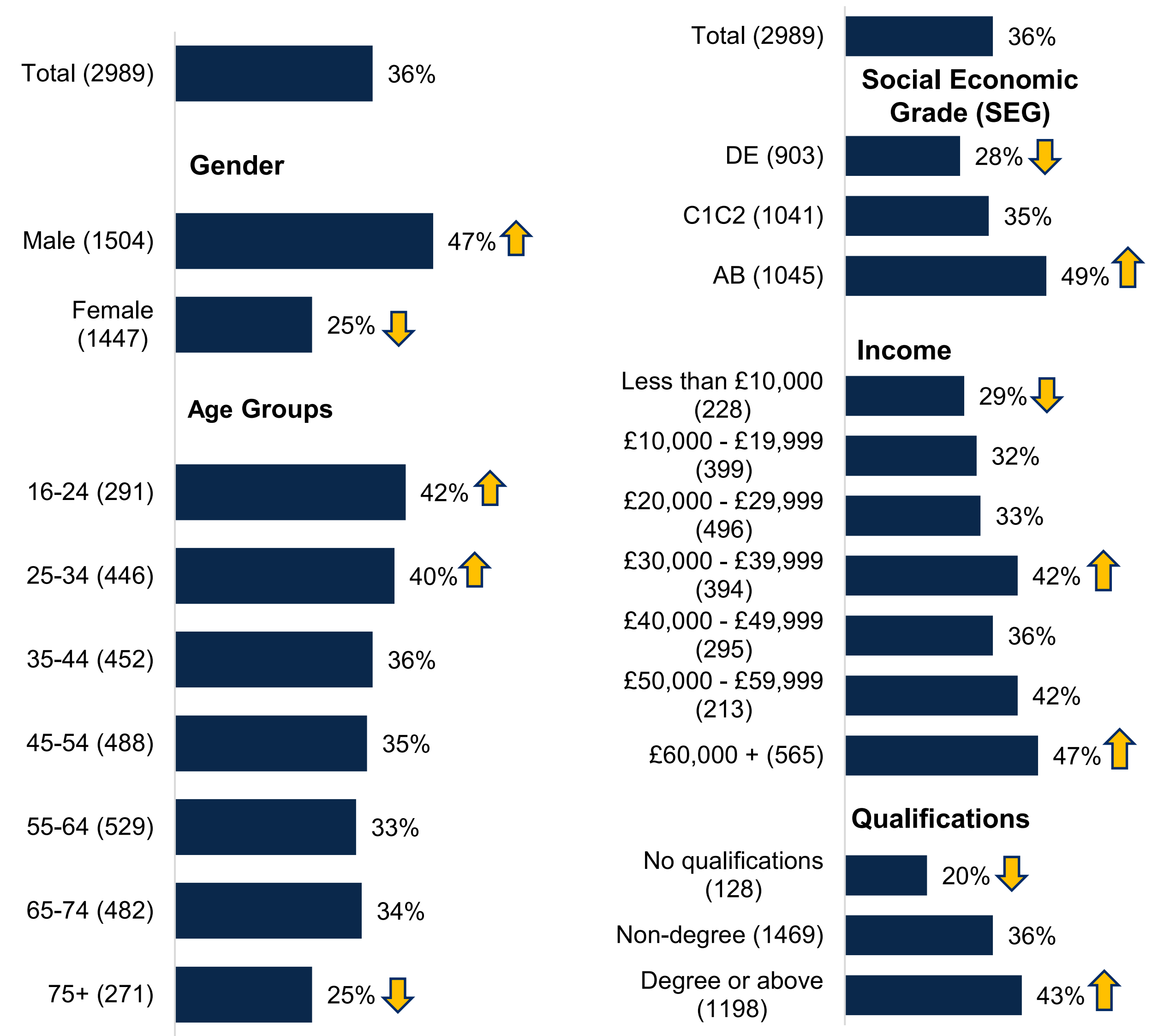
[15] Whilst not set out in full, responses to the question about how knowledgeable they feel about how the UK trades with countries *inside* the EU follow a similar pattern.

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

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



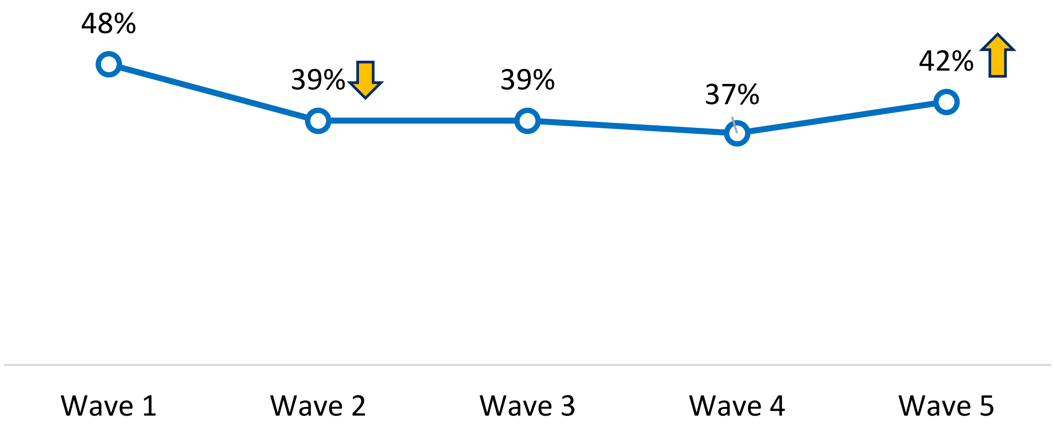
IK2. How knowledgeable would you say you currently are about…? How the UK trades with countries outside the European Union
Unweighted base sizes provided in parenthesis.
Statistical significance arrows represent significant differences against the average result.

4.4 Engagement

4.4.1 There has been a rise in the proportion who say they have seen or heard information about how the UK trades with other countries.

Two in 5 (42%) respondents reported seeing, reading or hearing information about how the UK trades, or will trade, with other countries in the previous week (see Figure 5). This proportion is higher than in wave 4 (37%) but remains lower than at wave 1 (48%)[17].

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



FT1. In the last week, have you seen or heard anything about how the UK trades with other countries, or will trade with them in the future?
% stating 'Yes'
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224) / Random half sample (Wave 4 = 1968, Wave 5 = 1540)
Only shown to 50% of the sample at random from wave 4. Shown to all respondents at waves 1 to 3. Comparisons to previous waves should be treated with caution.
Statistical significance arrows represent significant differences when compares to results observed at previous wave.

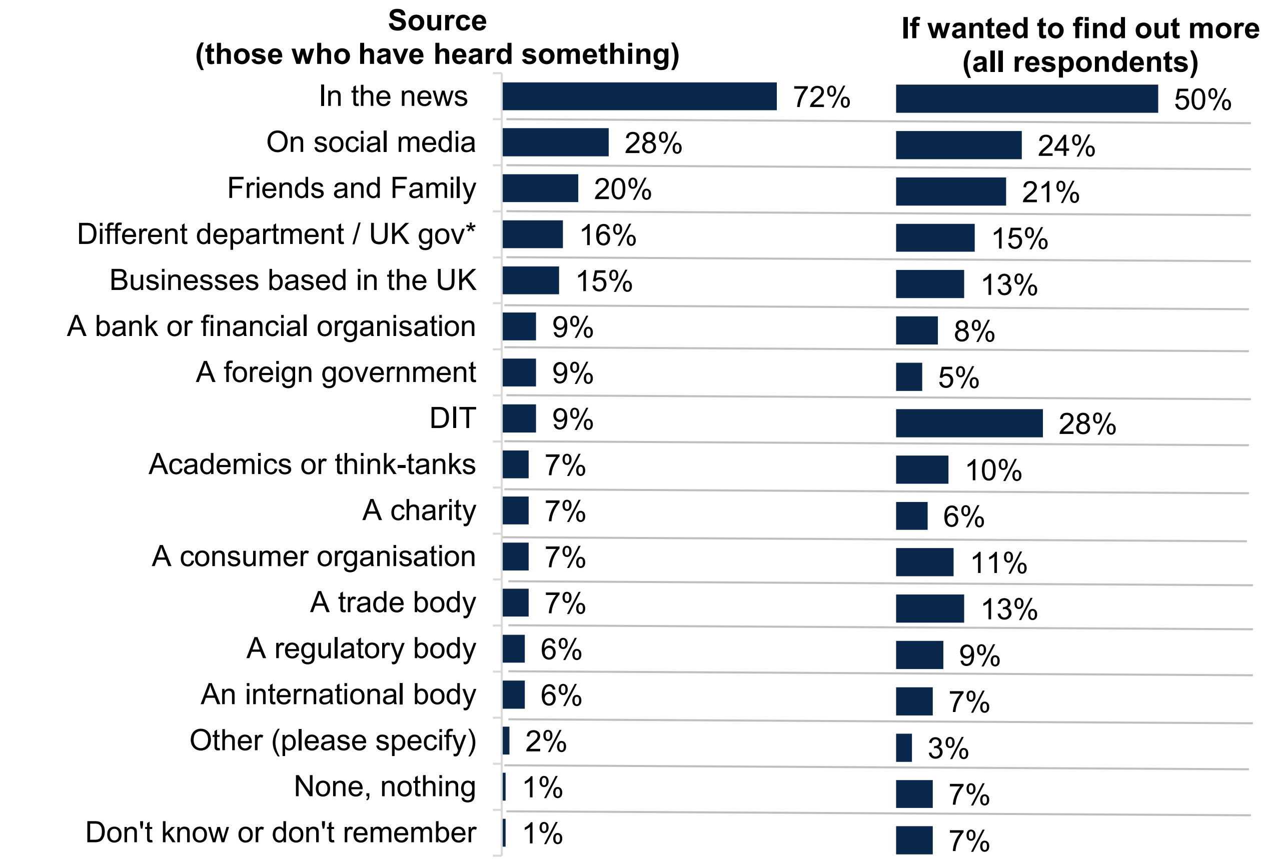
[17] From wave 4 this question was asked to a random 50% of the sample, rather than to all respondents as it was done in waves 1 to 3. Although the results at waves 4 and 5 are consistent with previous bursts, they should be interpreted with this cautionary note in mind.

4.4.2 The news and social media are the most commonly cited sources of information among those who have seen something in the last week about how the UK trades or will trade with other countries.

In total, 42% of respondents at wave 5 said that they had heard or read something about how the UK trades or will trade with other countries in the past week. These respondents were then asked from which sources they had heard about this (see Figure 6). Seven in 10 (72%) said that it was in the news, with just under 3 in 10 (28%) citing social media. DIT was mentioned by 9% of those who had heard about how the UK trades or will trade with other countries.

All respondents were then asked about the sources that they would use if they wanted to find out more about trade. Again, the news comes at the top of the list, with half (50%) of respondents selecting this source. This is followed by the DIT, mentioned by 28% of respondents, and social media (24%).

Figure 6: Sources of information about how the UK trades with other countries



FT1A. From which sources have you heard stories or news about trade? New at Wave 5. Base: Where heard anything about how the UK trades with other countries (729)
FT1B. If you wanted to find out more about trade, which of the following sources would you use? New at Wave 5. Base: All respondents Wave 5 (2989)
Sources mentioned in the other specify text box for these questions include: Chambers of Commerce, businesses outside of the UK, source materials such as treaties, specialist periodicals, the National Farmers' Union, accountants and accountancy firms, HMRC, investment bank analysts, UK professional bodies, and articles and interviews with local enterprises.

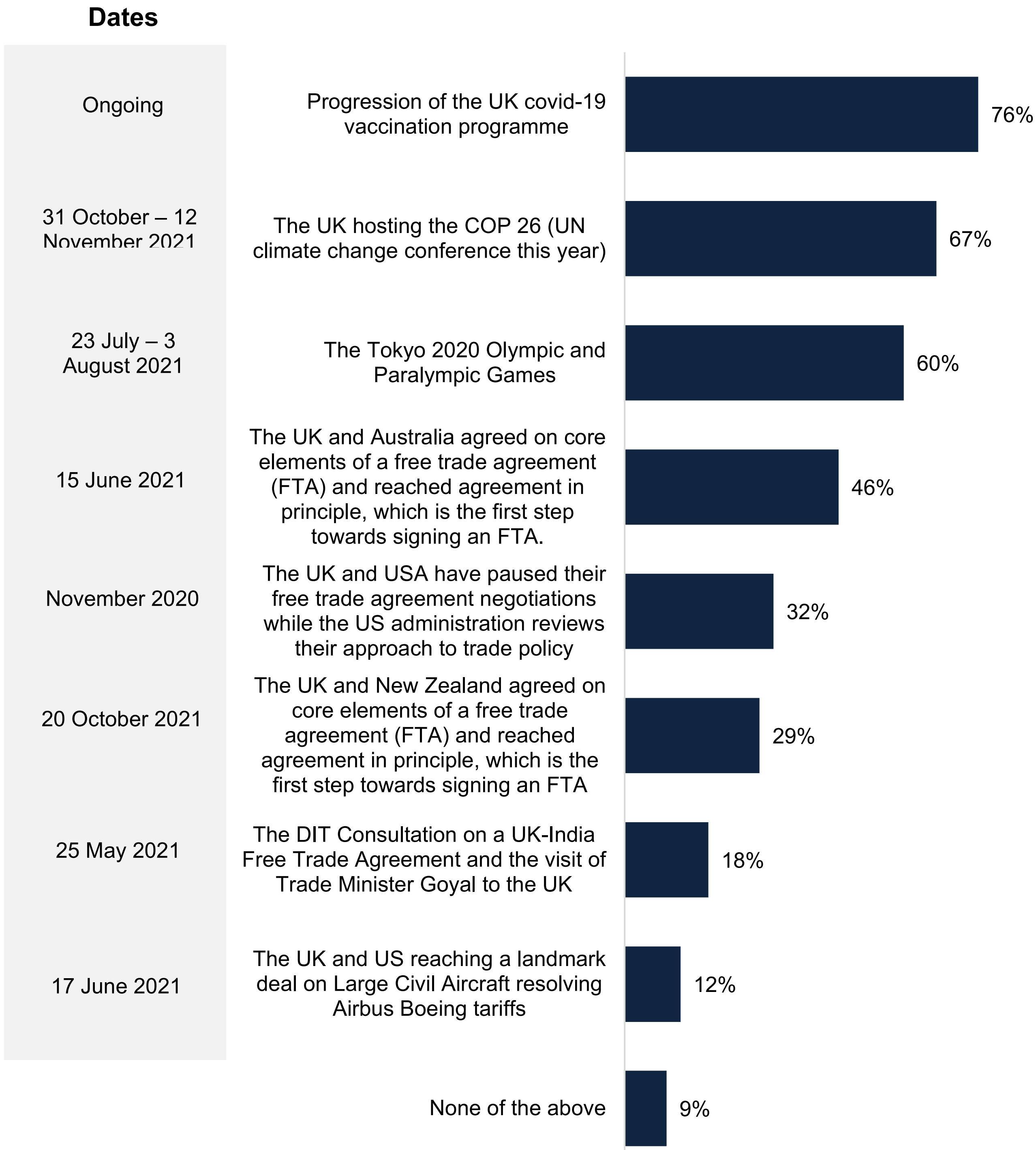
4.4.3 The UK and Australia agreement is the trade-related story with greatest cut-through at wave 5, with a larger proportion having heard about this than the UK-Japan free trade agreement at wave 4.

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

Results presented in Figure 7 show the UK and Australia free trade agreement is the trade-related story most respondents have heard about (46%). This is 14 percentage points higher than the proportion who had heard about the signing of the UK-Japan free trade agreement at wave 4 (32%).

A lower proportion say they had heard about the UK and USA pausing their free trade agreement negotiation (32%) or the UK and New Zealand agreeing on a free trade agreement in principle (29%). Fewer than 1 in 5 have heard about the DIT consultation on a UK-India FTA (18%) and the UK-US deal on Large Civil Aircrafts (12%).

Figure 7: Prompted topic recall



CV1. Which of the following topics do you recall having seen or heard about in the last 3 months?
Unweighted base size: random half sample wave 5 (1449)
Only shown to 50% of the sample at random from wave 4. Shown to all respondents at waves 1 to 3.

5 Support for free trade agreements and perceived impact

5.1 Support for free trade agreements

5.1.1 Support for establishing FTAs with countries outside the EU has fallen back in line with where it has been in the first 3 waves after a significant increase at wave 4. Opposition, however, has not increased compared to the previous wave.

Respondents were asked about the extent to which they are supportive of the UK establishing free trade agreements with countries outside of the EU[18]. It is worth bearing in mind that changes were made to the question text at wave 3. The question now focuses on support of establishing free trade agreements with countries outside of the EU, rather than measuring support of free trade agreements more generally. Despite changes to the question text, this question can still be used to measure support for free trade agreements in principle and has been compared with results from previous waves[19].

As Figure 8 shows, 2 in 3 (65%) respondents said they were supportive of the UK establishing free trade agreements with countries outside of the EU. This is statistically significantly lower than the result reported in wave 4 (70%) but it is in line with waves 1 to 3 (67% at wave 3, and 66% at waves 1 and 2).

Opposition to establishing free trade agreements with countries outside of the EU remains very low, with just 5% of respondents opposed. Opposition is in line with wave 4 (4%) and continues to be lower than at wave 3 (7%). The proportion who neither support nor oppose free trade agreements has remained stable compared to wave 4 (18% at wave 5 and 16% at wave 4). However, the proportion who say they don't know how they feel has increased (from 9% at wave 4 to 11% at wave 5).

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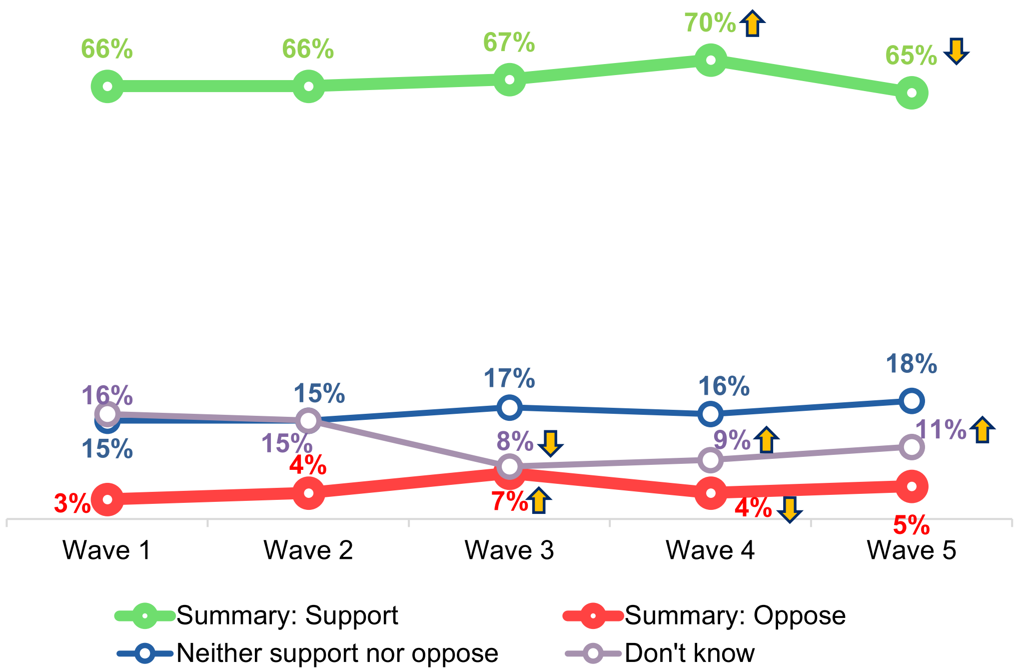
[18] The question specifically referenced "free trade agreements". There is some evidence to suggest that changes in question wording can impact levels of support, with the public slightly more supportive of "free trade" as compared to "free trade agreements". Please see: https://www.pewglobal.org/2018/09/26/americans-like-many-in-other-advanced-economies-not-co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

Figure 8: Support and opposition to the UK establishing free trade agreements with countries outside the European Union



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

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

- men: by a margin of 16 percentage points, men (74%) are more likely than women (58%) to say they support the UK establishing free trade agreements with countries outside of the EU

- higher socio-economic grades (SEG): over 4 in 5 (81%) of those in SEG classifications AB support the UK establishing free trade agreements with countries outside of the EU. This compares to 2 in 3 (65%) respondents in SEG classifications C1C2, and 55% of respondents in grades DE

- older people: there is a steady increase in support as you go up the age scale. Over half (53%) of those aged 16 to 24 support the UK establishing free trade agreements with countries outside of the EU, rising to 84% of those aged 75+

- those with degree level qualifications: of those with degree or above level qualifications, 3 in 4 (74%) report being supportive of the UK establishing free trade agreements with countries outside of the EU. This compares with around 2 in 3 (66%) of those with non-degree qualifications, and below half of those with no qualifications (45%)

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

The largest changes in support among sub-groups compared to wave 4 can be observed among the following demographics. These are: those with no qualifications (-15 percentage points) and respondents with qualifications below degree level (-9 percentage points).

5.2 Future economic outlook

5.2.1 A larger proportion of people now believe the economy will worsen over the next 12 months than say it will get better.

The survey explored the economic outlook of respondents, asking whether they expect the general economic conditions of the country to improve, get worse or stay about the same in the next 12 months. This question changed in waves 4 and 5 from the wording in wave 3, where respondents were asked how long they thought it would take for the UK economy to recover from COVID-19 once lockdown restrictions were lifted.

Overall, respondents at wave 5 were more pessimistic than optimistic about the general condition of the economy over the next year. Around 1 in 3 (35%) expect the UK economy will get worse, while a lower proportion (26%) expect the economy to perform better than at present. The remainder say that it will stay the same (27%) or that they are unsure (12%).

This represents a reversal from wave 4, where the opposite trend was observed. Economic pessimism was previously 10 percentage points lower than optimism (37% thought the economy would perform better over the following 12 months and 27% said it would get worse).

The estimated economic outlook differs significantly by gender, with men more likely to expect an improvement than women. Around 1 in 3 (31%) men expect the economy to improve in the next year, compared to 1 in 5 (22%) women. Women (37%) are significantly more likely than men (33%) to think that the economy will get worse.

Age also seems to play a role, with older generations being more optimistic than younger people. One in 5 (17%) of 16 to 24 year olds believe the economy will get better, which compares to a third (32%) of those aged 55 or above.

Those educated to degree level or above are more likely to state that the economic situation will get worse over the next 12 months: 40% of degree holders, compared to 33% of those with qualifications below degree level and 33% of those with no qualifications felt this way.

By socio-economic group, those in SEG classifications AB are more likely to say that the economy will improve (34%), those classed as C1C2 are more inclined to say that the economic situation will stay the same (32%), and those classed as DE are more inclined not to know (19%).

5.2.2 The way respondents feel about the economy continues to relate to how they feel about trade more broadly.

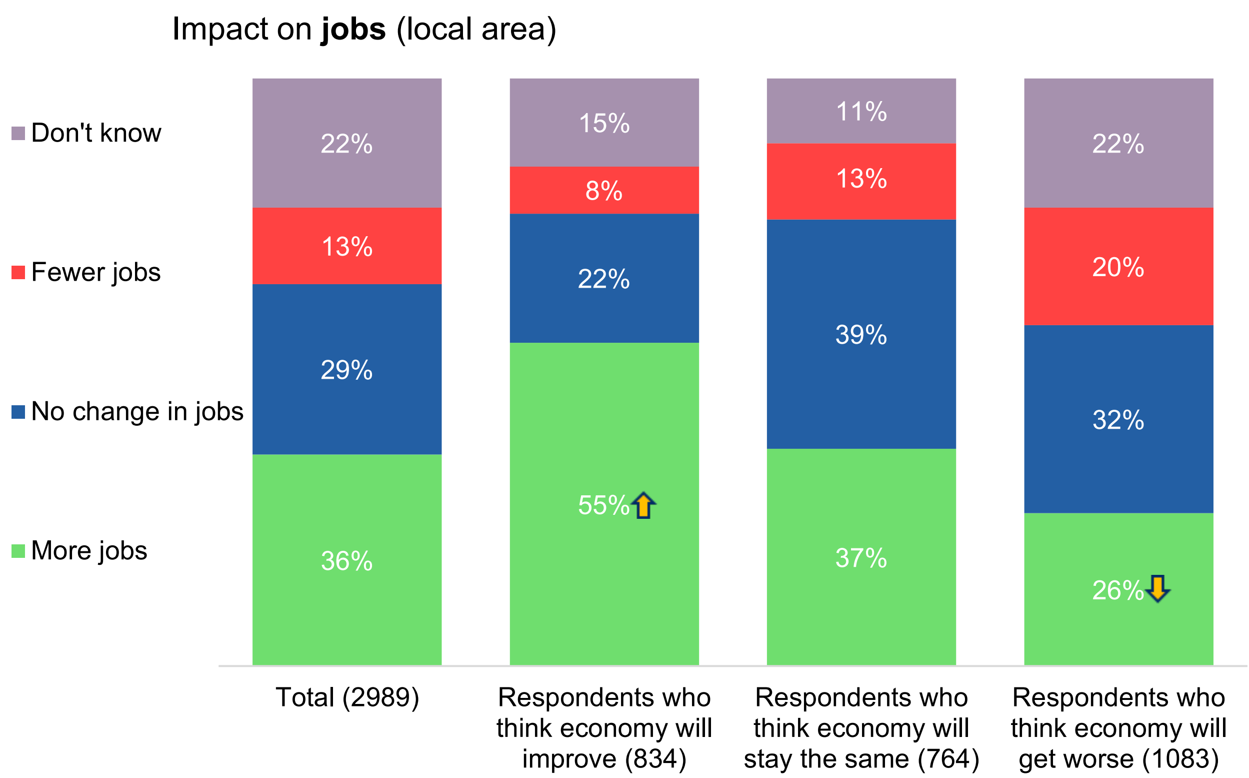
Figure 9, below, shows how attitudes towards the economy are linked to attitudes about the economic impact of free trade. This figure reports the impact on jobs and wages locally, but the results presented are selected as indicative of the relationship for other questions exploring perceived impact or support for free trade[20].

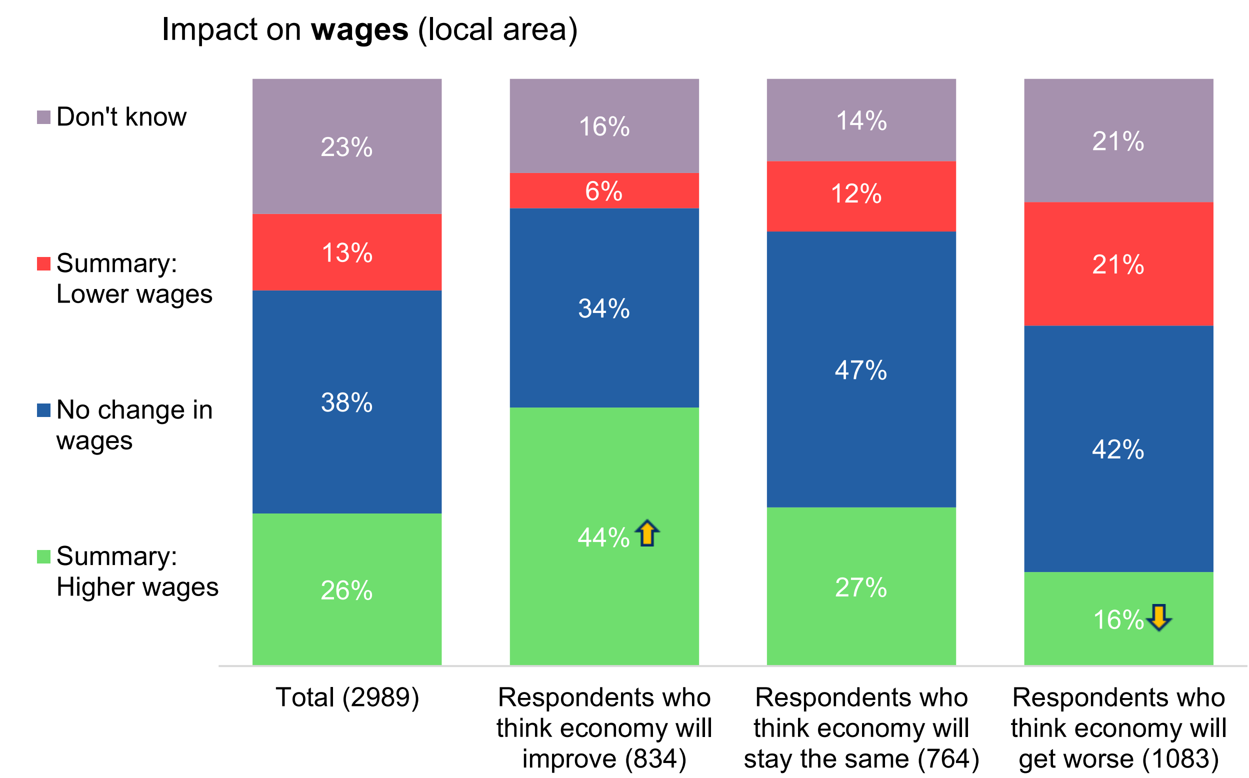
Taking the impact on local jobs as an example, 55% of those who believe the economy will improve think increased free trade will lead to more jobs overall. This compares to 26% of those who say the economy will get worse over the next year.

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

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

Figure 9: Impact of free trade on jobs and wages by economic outlook





UK3. Now thinking about both the UK as a whole and then just your local area, do you think that increased free trade would result in more jobs being created overall, or fewer jobs being created overall? UK4....still thinking about the UK as a whole, and then just your local area, do you think that increased free trade would result in higher wages, or lower wages? Base: all respondents (Wave 5 = 2989) Statistical significance arrows represent significant differences when compared to total. Only marked for more jobs/higher wages

Regression analysis[21] was conducted to reveal the most significant drivers of support for the UK establishing free trade agreements with countries outside of the EU. Economic outlook is the most significant driver of support, with a relative importance score of 56%, the highest of any variable included in the model.

5.3 Perceptions of the impact of free trade agreements

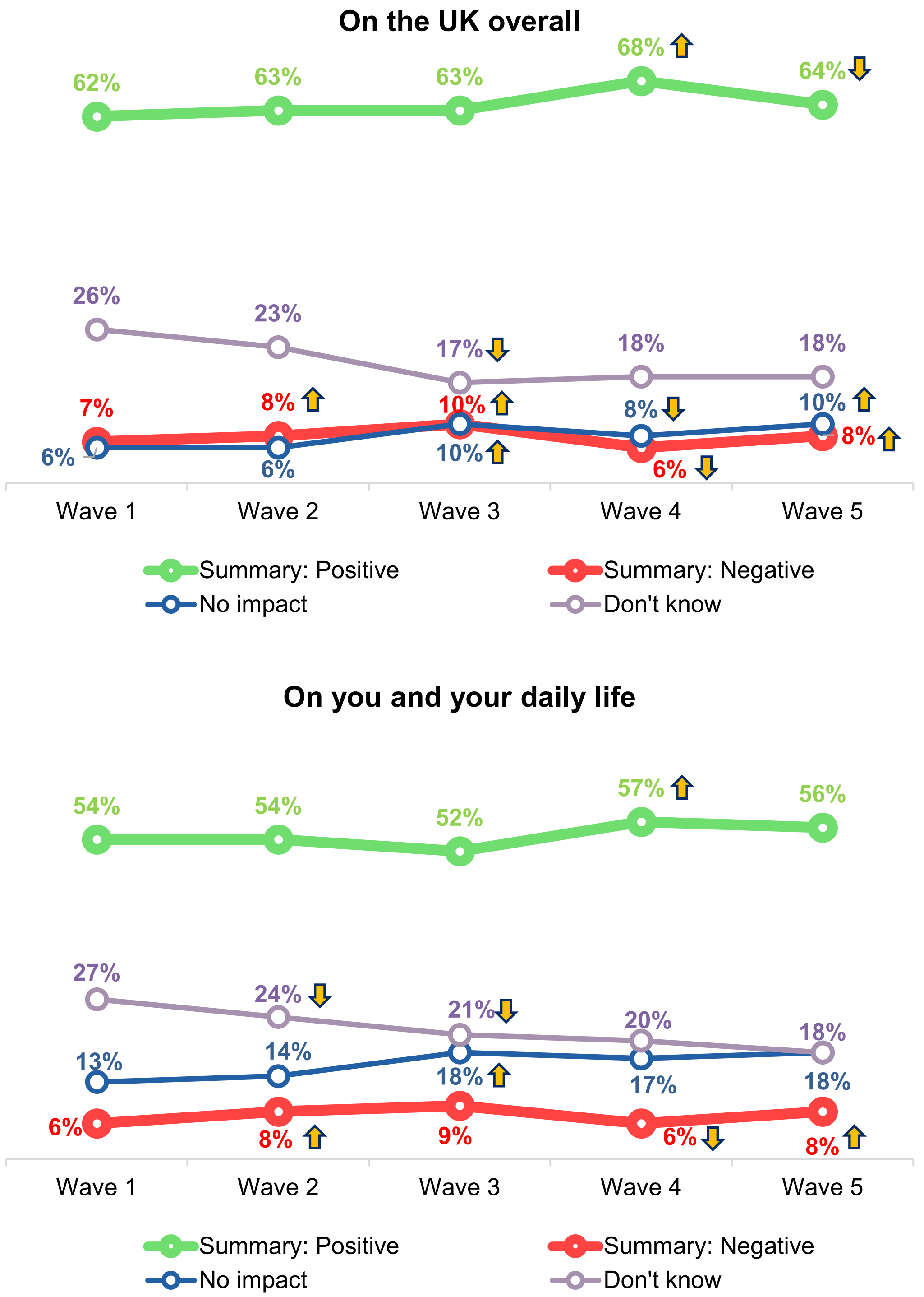
5.3.1 Perceptions about the impact of trade on the UK overall have become slightly more negative since wave 4.

As Figure 10 illustrates, around 2 in 3 (64%) think that signing free trade agreements with countries outside the EU would have a positive impact on *the UK overall.* This proportion is lower than at wave 4 (68%). However, this result is in line with waves 2 and 3 (both 63%) and higher than wave 1 (62%). Likewise, 56% think that the effect will also be positive on their *daily lives*. This figure has remained in line with wave 4 (57%) and continues to be higher than the results from waves 1 to 3. These figures have been accompanied by an increase in the proportion who think the impact will be negative both at a UK and personal level. 8% consider that the impact will be negative respectively at a UK and personal level, compared to 6% at wave 4.

There is a gap between the proportion of respondents who state free trade agreements will have a positive impact on the UK overall (64%), and those who state they will have a positive impact on their daily lives (56%). This is a trend that has been observed in previous waves of the research. Its continuation highlights that respondents are often less sure about the immediate impact that free trade agreements may have on their daily lives. They instead view it as more of a national issue.

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

Figure 10: Perceived impact of free trade agreements on UK overall and daily life



UK1. In general, do you think that the UK signing free trade agreements with countries outside the European Union would have a positive impact or a negative impact on *the UK overall*?
UK2. In general, do you think that the UK signing free trade agreements with countries outside the European Union would have a positive impact or a negative impact *on you and your daily life*?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

5.3.2 Belief that free trade would lead to more jobs in the UK overall and in their local area has not changed significantly since wave 4

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

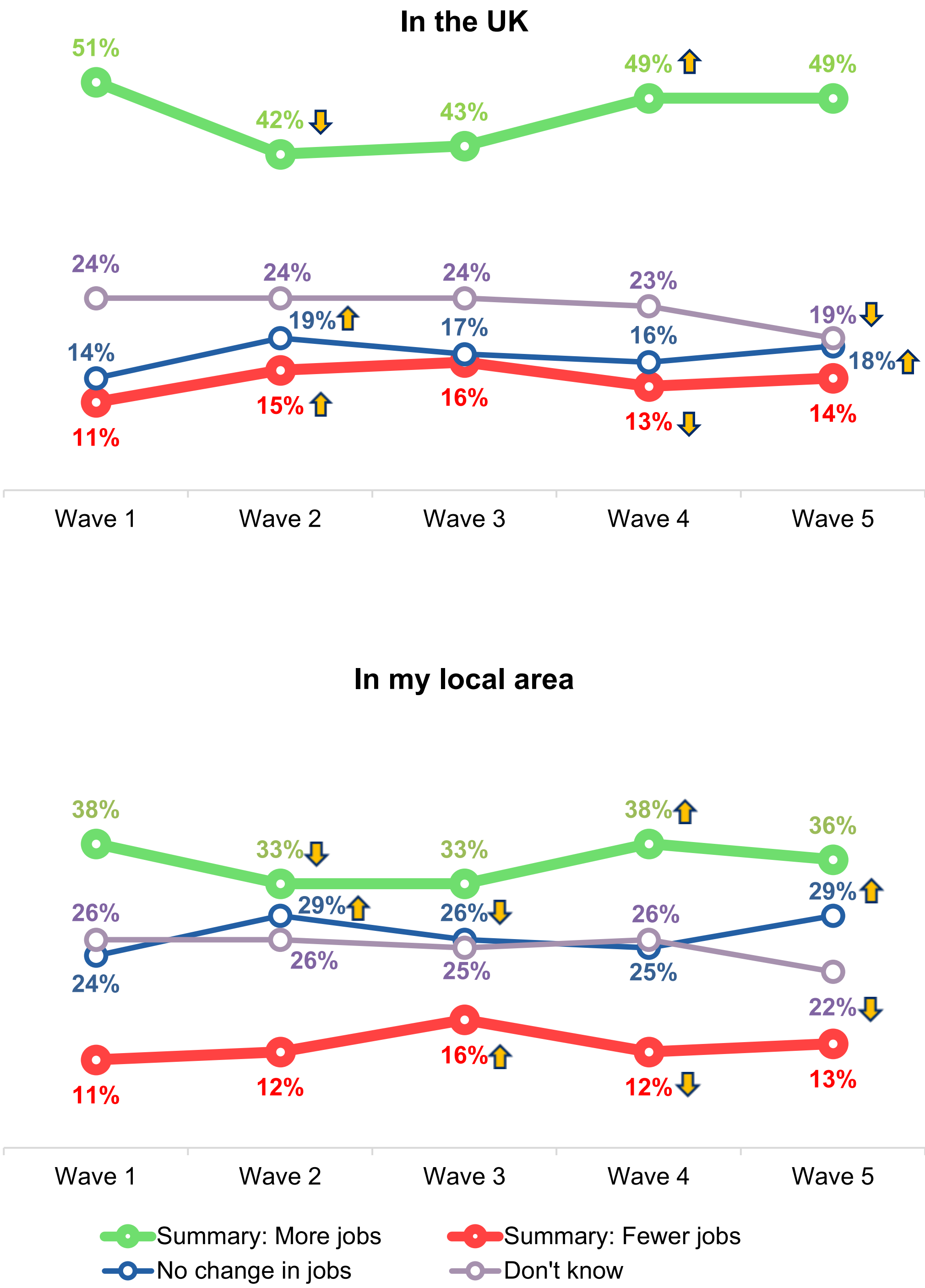
Perceptions of the impact on jobs from free trade in wave 5 are in line with wave 4, in terms of impact both within the UK and locally. As is set out in Figure 11, around half (49%) of respondents stated that increased free trade would create more jobs in the UK overall (compared to 49% at wave 4). Meanwhile, 14% stated that increased free trade would mean fewer jobs (compared to 13% at wave 4).

Belief that free trade would create more jobs in the local area has also remained stable, with 1 in 3 (36%) stating this (38% at wave 4). 13% of respondents believe that free trade would lead to fewer jobs locally (12% at wave 4), and a larger proportion of respondents believe it will have no impact than was the case in wave 4 (29% compared to 25% in wave 4).

Those in the East of England are more likely to say that free trade would lead to more jobs being created in the local area (43%, compared to 36% overall). Conversely, those in London are more likely to say that free trade would lead to fewer jobs being created (18%, compared to 13% overall), as are those in Wales (20%).

As with previous waves, however, there continues to be a notable difference in the proportions saying that free trade would result in an increase in jobs in the UK overall compared to in their local area. The size of the gap, at 13 percentage points, is slightly higher than what was observed at previous waves (11 percentage point gap at wave 4 and 10 percentage point gaps respectively at waves 2 and 3).

Figure 11: Perceived impact of free trade on job creation



UK3. Now thinking about both the UK as a whole and then just your local area, do you think that increased free trade would result in more jobs being created overall, or fewer jobs being created overall?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

5.3.3 For the second wave in a row, there has been an increase in those who feel that free trade would lead to higher wages in both the UK and their local area.

Unlike with jobs, we see an increase in the proportions of respondents believing that more free trade will lead to higher wages at both a national and local level (see Figure 12).

Just under a third (31%) believe that an increase in free trade would lead to higher wages in the UK overall, an increase of 4 percentage points since wave 4 (27%). However, this has not been accompanied by a reduction in those who believe wages would decrease: 14% said that wages would decrease in the UK at wave 5, as was the case in wave 4. Instead, it is the proportion who say they don’t know about the impact on wages which has gone down significantly from 25% at wave 4 to 22% at wave 5.

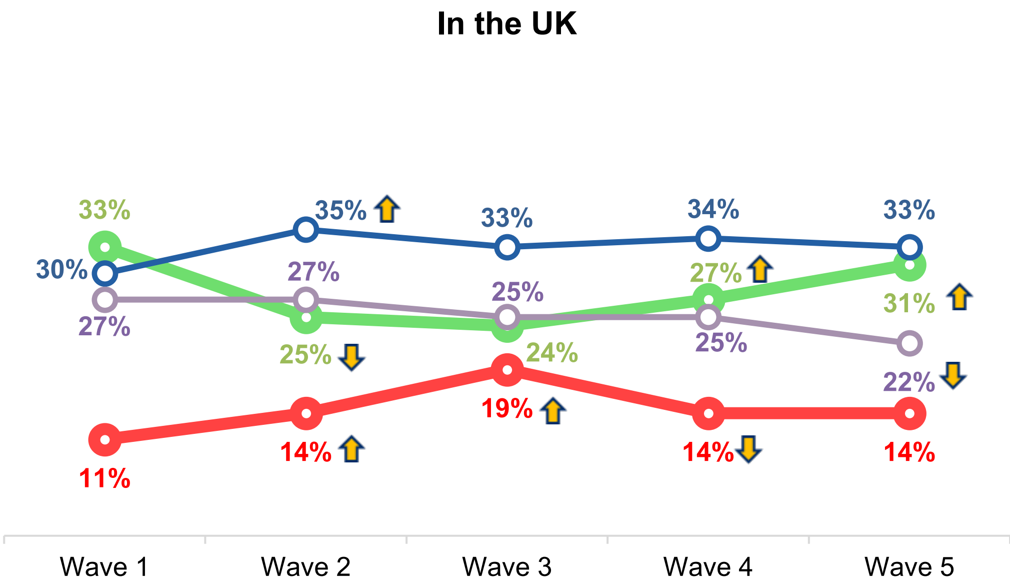
Just over a quarter (26%) expect wages to go up in their local area as a result of increased free trade, representing an increase of 3 percentage points compared to wave 4 (23%). However, the proportion who believe that increased free trade would result in lower wages has remained stable compared to wave 4 (13% respectively at waves 4 and 5). It is the proportion who are unsure that has decreased from 26% at wave 4 to 23% at wave 5.

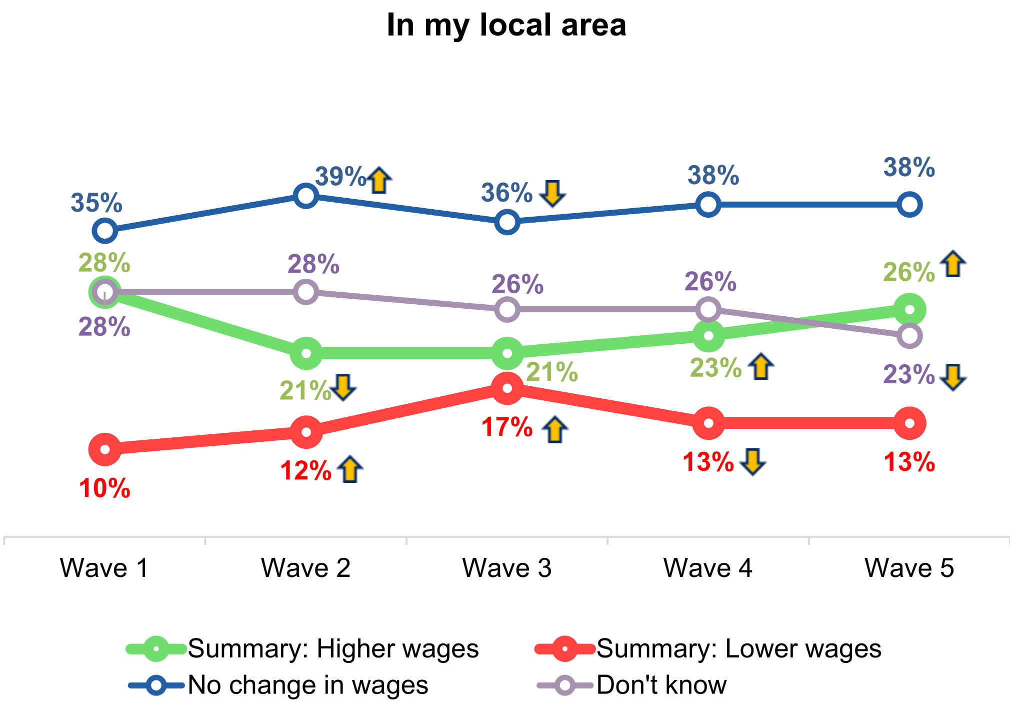
Perceptions that increased free trade will lead to lower wages in the UK are more common among respondents more likely to be of working age (under 65). For example, 21% of respondents aged 16 to 24 felt that increased free trade would lead to lower wages in the UK, compared to 8% of those aged 65 to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

By region, respondents in the East of England are more likely to say that free trade would lead to higher wages in their local area (32%, compared to 26% overall who said so when asked about the local area). However, respondents in London are more likely to state the opposite (in both regions 17% stated that free trade would lead to lower wages in their local area compared to 13% overall). This same pattern was observed when analysing the impact of free trade on jobs in the local area.

Respondents in Scotland are also more likely to state to state that free trade would lead to lower wages in their local area (17% compared to 13% overall).

Figure 12: Impact of trade on wages





UK4. Do you think that increased free trade would result in higher wages or lower wages? In the UK
UK4. Do you think that increased free trade would result in higher wages or lower wages? Your local area
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

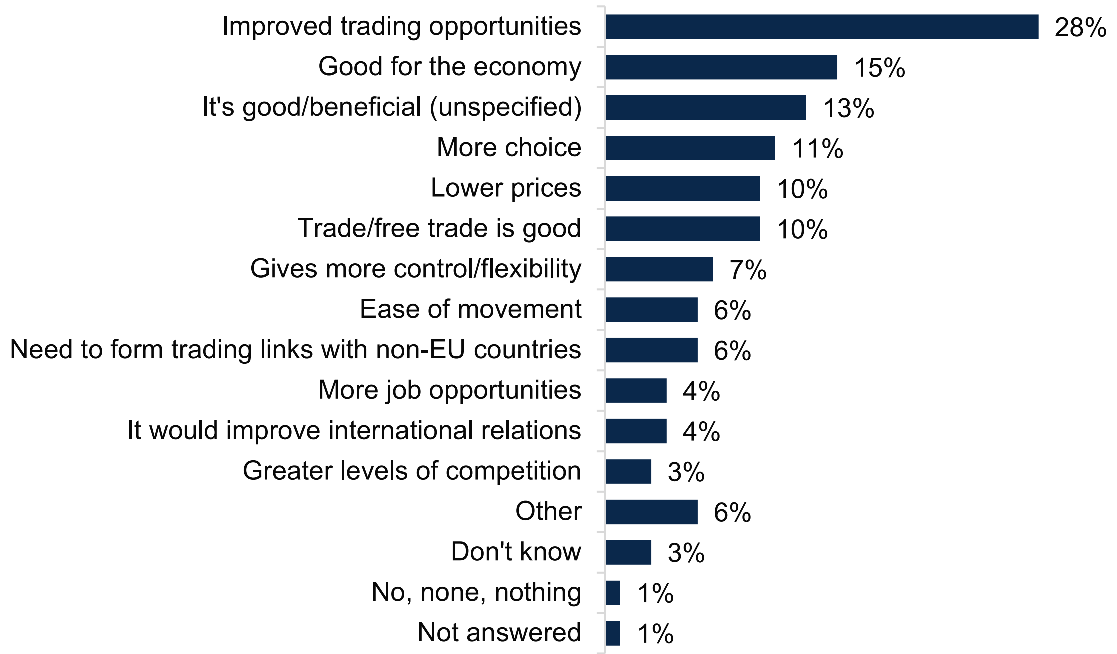
5.3.4 Themes around improved opportunities, free trade being generally good for the economy, and lower prices continue to be the main reasons why people think increased free trade will have positive impact on UK.

Respondents were asked in an open response format to say why they felt the impact on the UK overall would be positive or negative[22].

Figure 13 shows the responses for those who stated the impact would be positive (64% of respondents). As in wave 4, the most cited reason was improved trading opportunities (28%). Meanwhile, others gave responses along the lines of "free trade is good/beneficial" (13%) or that free trade is good for the economy (15%).

This was followed by having more choice (11%) and lower prices (10%).

Figure 13: Reasons for perceived positive impact of free trade on UK overall



UK1a. What makes you say this?
Open response question[23].
Unweighted base size: where people believe trade will have positive impact on UK (1973)
Please note that coded responses that did not reach a threshold of 3% have not been presented on this chart.

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

5.3.5 Improved trading opportunities and ease of movement have become more prominent reasons for thinking that increased free trade will have a positive impact on the UK.

Table 3 shows the largest changes that can be observed between waves 4 and 5 when analysing reasons for believing that free trade will have a positive impact on the UK. Please note that some of these changes are from a very low base.

The proportion of respondents citing improved trading opportunities has increased by 5 percentage points compared to wave 4. Ease of movement mentions have increased by 4 percentage points. Perceptions that free trade gives more control/flexibility or that it provides more choice have also gone up (by 4 and 3 percentage points respectively).

In contrast, a lower proportion of respondents said that free trade will lead to lower prices compared to wave 4 (-4 percentage points). Moreover, the proportion of respondents citing the need to form trading links with non-EU countries has also decreased by 3 percentage points.

Table 3: Reasons for perceived positive impact of free trade on UK overall - largest changes between waves 4 and 5

Theme	W4	W5	Change (W5 vs. W4)
Improved trading opportunities	23%	28%	+5
Ease of movement	2%	6%	+4
Gives more control/flexibility	4%	7%	+3
More choice	9%	11%	+2
Lower prices	14%	10%	-4
Need to form trading links with non-EU countries	9%	6%	-3

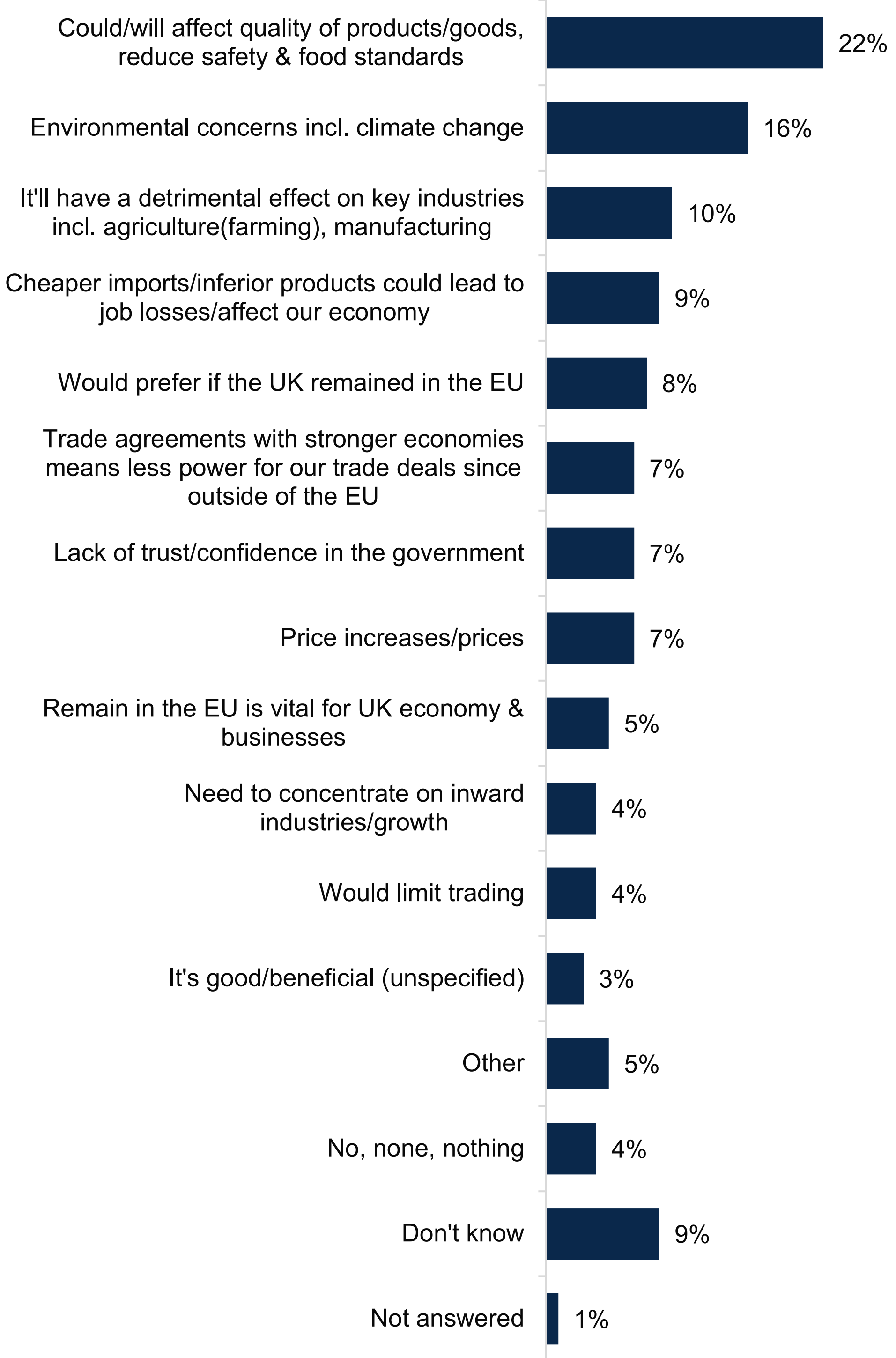
UK1a. What makes you say this?
Open response question.
Base: where believe will have positive impact on UK (Wave 4 = 2818, Wave 5 = 1973)
Please note that coded responses that did not reach a threshold of 3% have not been presented on this chart. Table sorted by size of % point change between wave 4 and 5.
** Difference with percentages due to rounding*

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

Examining the results for those who believe increased free trade would negatively impact the UK overall (8% of respondents), one particular theme stands out (see Figure 14). One in 5 (22%) respondents said that free trade could affect the quality of goods/services and reduce safety and food standards, including animal welfare.

Concerns related to quality and standards were the most common. The next most commonly cited themes were concerns about the environment and/or climate change (16%), detrimental impacts on key industries like manufacturing and agriculture (10%), and cheaper/inferior products leading to job losses or impacting the economy (9%).

Figure 14: 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 (307)
Please note that coded responses that did not reach a threshold of 3% have not been presented on this chart.

5.3.7 Although impact on quality and standards is still the most mentioned topic of concern about free trade, mentions of detrimental effects on key industries such as agriculture and manufacturing have gone up.

As Table 4 shows, among those who believe the impact of increased free trade on the UK to be negative, there have been changes in the reasons they think this. There has been a 7 percentage point increase in the proportion of respondents who state that free trade will have a detrimental effect on key industries including manufacturing and agriculture. Mentions of a lack of trust in the Government, a preference to remain in the EU, and environmental concerns have also increased compared to wave 4 by 5 percentage points respectively.

Other increases relate to:

- trade agreements with stronger economies meaning less power for our trade deals since outside of the EU (+4 percentage points),
- believing that remaining in the EU is vital for the economy and businesses (+4 percentage points)
- environmental concerns (+5 percentage points)
- needing to concentrate on inward industries and growth (+2 percentage points)
- concerns around goods and food quality and standards,
- and cheaper imports or inferior products leading to job losses (+3 percentage points)

Conversely, a lower proportion of respondents cited the need to form trade links with non-EU countries (-3 percentage points).

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

Theme	Wave 4	Wave 5	Change (wave 4 versus wave 5)
It'll have a detrimental effect on key industries including agriculture (farming), manufacturing	3%	10%	+7
Lack of trust/confidence in the government	2%	7%	+5
Would prefer if the UK remained in the EU	3%	8%	+5
Environmental concerns incl. climate change	11%	16%	+5
Trade agreements with stronger economies means less power for our trade deals since outside of the EU	3%	7%	+4
Remain in the EU is vital for UK economy & businesses	1%	5%	+4
Could/will affect quality of products/goods, reduce safety & food standards	19%	22%	+3
Cheaper imports/inferior products could lead to job losses/affect our economy	6%	9%	+3

Theme	Wave 4	Wave 5	Change (wave 4 versus wave 5)
Need to concentrate on inward industries/growth	2%	4%	+2
Need to form trading links with non-EU countries	3%	<0.5%	-3
Need to maintain some trade links with the EU after Brexit	4%	1%	-3

UK1a. What makes you say this?
Open response question.
Unweighted base size: where believe will have negative impact on UK (Wave 4 = 291, Wave 5 = 307)

5.3.8 Expectations about the impact of free trade on price remain stable. The public are more likely than they were in wave 4 to think there will be a negative impact on the quality of products available in the event of increased free trade.

The proportion of respondents who expect prices to decrease as a result of more free trade has remained stable compared to wave 4 (see Figure 15). In wave 5, 39% of respondents believe prices would decrease (versus 37% in wave 4) and a quarter (26%) believe the opposite would be the case (26% in wave 4).

Looking at these results by sub-groups, men (42%) are significantly more likely than women (36%) to think that free trade will lead to lower prices. Those aged 45 to 54 are more likely than average to believe free trade will lead to reduced prices (43%), as are those with degree or above level qualifications (49%). Respondents in the least deprived quartile (45%), and those in SEG classifications AB (50%) and White respondents (41%) are also more likely to feel this way. Conversely, people from BAME backgrounds are more likely to believe that free trade will lead to higher prices (35%). This is also the case for those aged 16 to 24 (35%) and respondents who live in Wales (34%).

The increase in the proportion of respondents who said that free trade will lead to lower prices is driven by the following sub-groups:

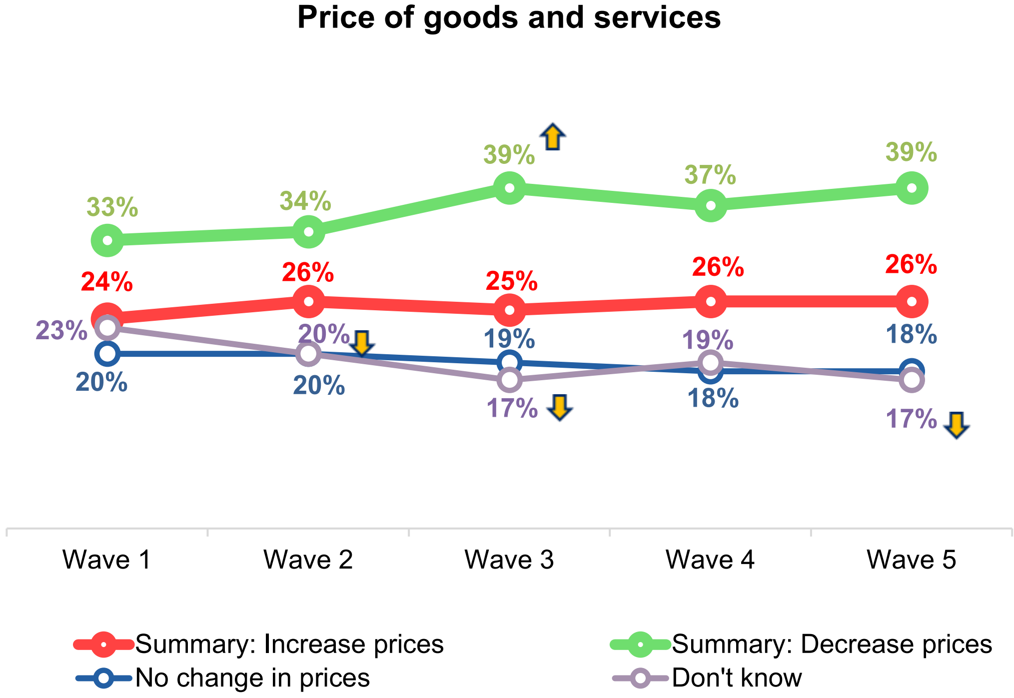
- women are 3 percentage points more likely to state that increased free trade will lead to lower prices (33% at wave 4 and 36% at wave 5)
- White respondents (+3 percentage points, from 38% at wave 4 to 41% at wave 5)
- respondents in the North of England (+ 5 percentage points, from 34% at wave 4 to 39% at wave 5)
- and those aged 65 to 74 (+9 percentage points, from 34% at wave 4 to 43% at wave 5).

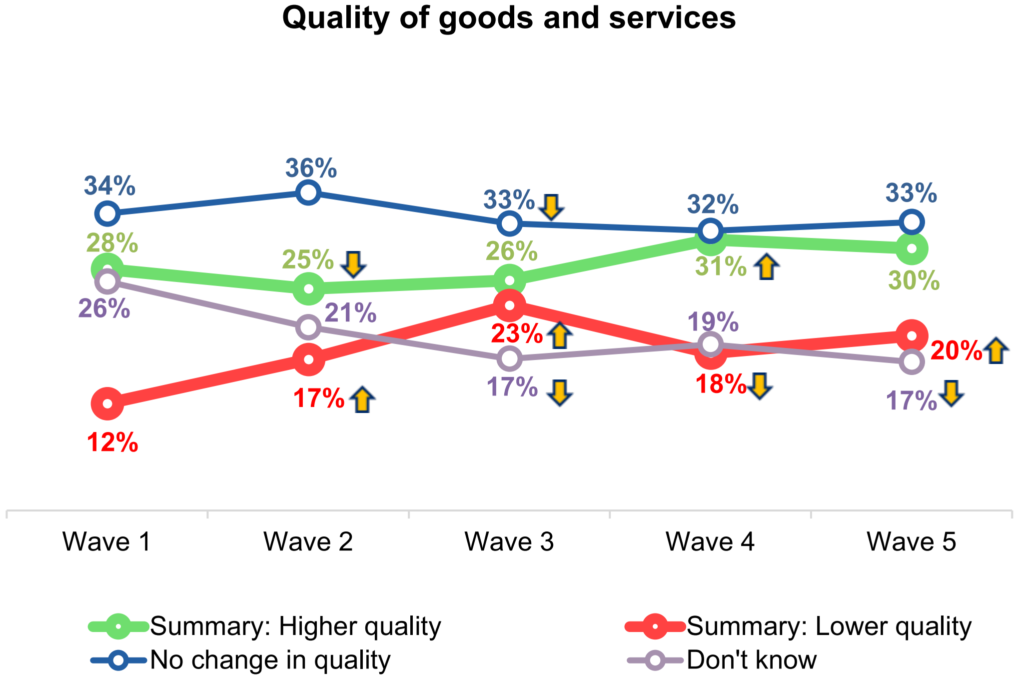
Perceptions around the impact of free trade on the quality of goods and services have also changed compared to wave 4. There has been an increase in those who would expect free trade to lead to lower quality goods and services. Two in 10 (20%) would expect increased free trade to lead to lower quality. This is 2 percentage points more than in wave 4 (18%) and the second highest score since tracking began (after 23% stated that increased free trade would lead to lower quality goods and services at wave 3). Nonetheless, the proportion who feel free trade would lead to higher quality goods and services (30%) is in line with wave 4 (31%). A third (33%) feel increased free trade would have no impact on quality (versus 32% in wave 4).

Changes in attitudes towards the quality of goods and services are driven by the following groups of respondents, who are now more likely to consider that the quality of products and services would be worse as a result of free trade:

- those living in the Midlands (+4 percentage points, from 15% at wave 4 to 19% at wave 5)
- women (+2 percentage points, from 17% at wave 4 to 19% at wave 5)
- and White respondents (+2 percentage points, from 19% at wave 4 to 21% at wave 5).

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





UK5. Thinking about just the UK as a whole, do you think that increased free trade would result in an

increase in the price of goods and services, or a decrease in the price of goods and services?
UK6. Still thinking about the UK as a whole, do you think that increased free trade would result in the availability of higher quality goods and services, or lower quality of goods and services?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

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

5.4.1 Public awareness of the CPTPP has dipped slightly since wave 4.

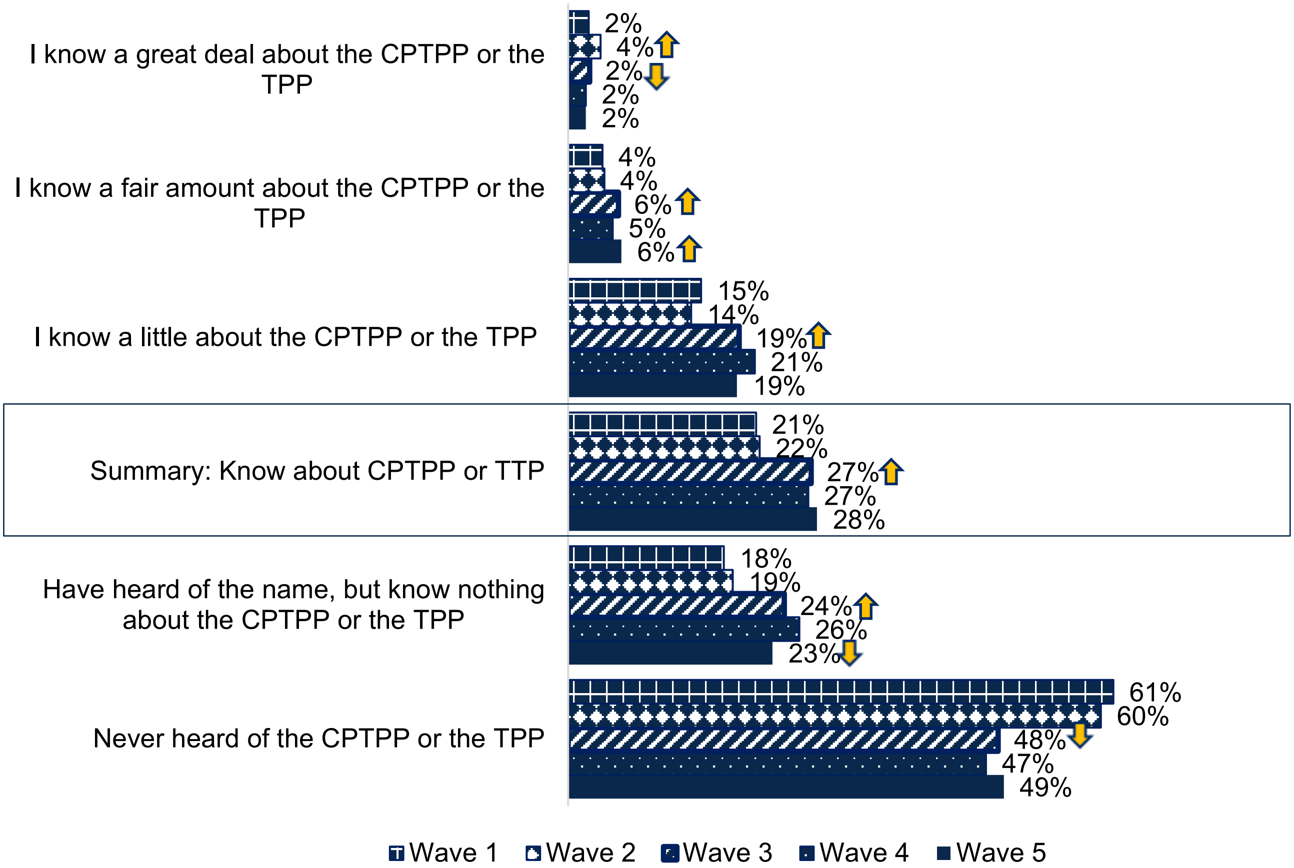
The survey explored awareness of and attitudes towards the UK joining the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). The CPTPP is a trade agreement between 11 countries (Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore, and Vietnam), covering around 500 million people and representing 13% of global GDP in 2020[24]. The UK submitted its application to join the CPTPP on 1 February 2021 and on 2 June 2021, the CPTPP Commission formally invited the UK to begin accession negotiations. Negotiations about the terms of accession took place between the UK and member countries from July 2021. On 18 February 2022, the UK moved into the final stage of the accession process, market access negotiations[25].

The proportion of respondents who know about the CPTPP or TPP is consistent with wave 4 (28% compared to 27% in wave 4). The proportion who have heard about the name of the CPTPP or its predecessor, the Trans-Pacific Partnership (TPP), but otherwise know nothing about it has gone down from 26% at wave 4 to 23% at wave 5.

Awareness in waves 3, 4 and 5 continues to be higher than in previous waves. However, some caution is recommended when comparing results from the 2 first waves with those of the 3 most recent waves, given the change in data collection methodology at wave 3. This change to methodology appears to have had more of an impact on questions around knowledge and awareness, so this question is particularly susceptible to increased overclaim[26].

[24] From https://www.bbc.co.uk/news/explainers-55858490
[25] More details: https://www.gov.uk/government/news/trade-secretary-secures-major-trade-bloc-milestone-ahead-of-asia-visit
[26] When comparing wave 2 push-to-web completes and wave 3 push-to-web completes, the levels of awareness are consistent, suggesting that this shift may be being driven at least in part by changes to the methodology.

Figure 16: Awareness of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) or the Trans-Pacific Partnership (TPP)



CPTPP. How aware are you of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) formerly known as Trans-Pacific Partnership (TPP)?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

5.4.2 Support for the UK joining the CPTPP is high but it has decreased compared to wave 4, although it remains higher than in waves 1 to 3.

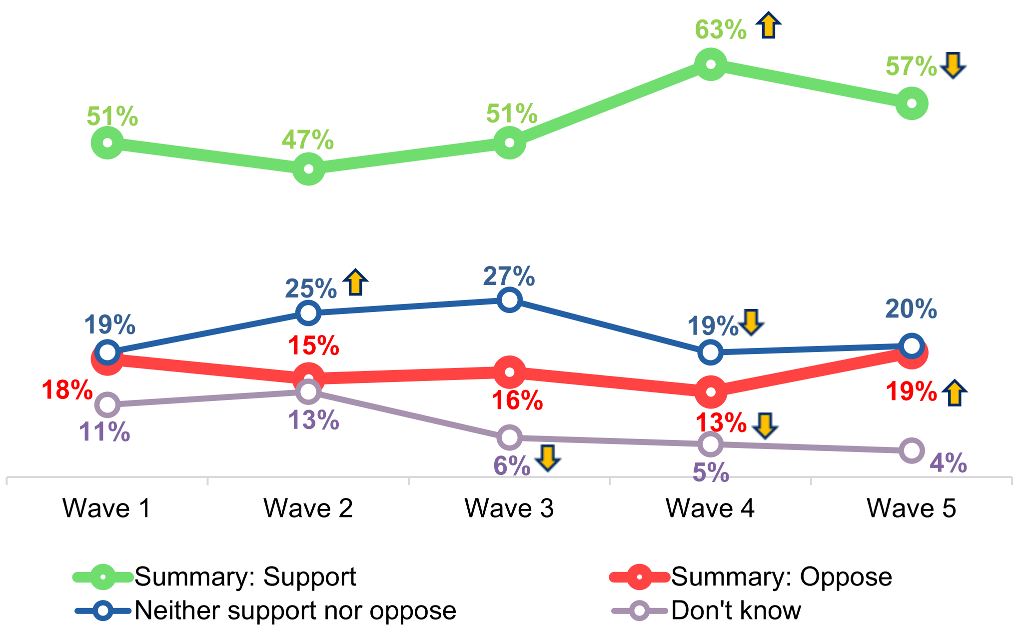
Respondents were then asked about whether they would support the UK joining the CPTPP (see Figure 17). It is worth noting that in waves 1 to 3 this question was only asked to those who indicated some degree of awareness of the agreement (beyond simply reporting having heard of the name alone). From wave 4 all respondents were asked this question. To make results comparable to previous waves, wave 4 and wave 5 results shown in Figure 17 are based just on those who have some degree of awareness of the CPTPP.

Support amongst those who indicated awareness of the agreement is 57%. This is 6 percentage points lower than the levels of support at wave 4 (63%) but remains higher than in waves 1 to 3 (51% at wave 3, 47% at wave 2 and 51% at wave 1). This has been accompanied by an increase in levels of opposition, with 19% opposed (versus 13% at wave 4).

As in wave 4, support among those who indicated awareness of the agreement is higher than for all respondents (57%, compared to 46%). However, opposition is also higher among those who have some awareness of the CPTPP compared to all respondents (19%, compared to 10%).

Support has decreased across most sub-groups, however not all decreases are significant due to the varying base sizes for each sub-group.

Figure 17: Support for the UK to join the CPTPP



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

5.5 The Gulf Cooperation Council (GCC)

5.5.1 Awareness of the Gulf Cooperation Council is low, with close to 2 in 3 saying that they've never heard of it.

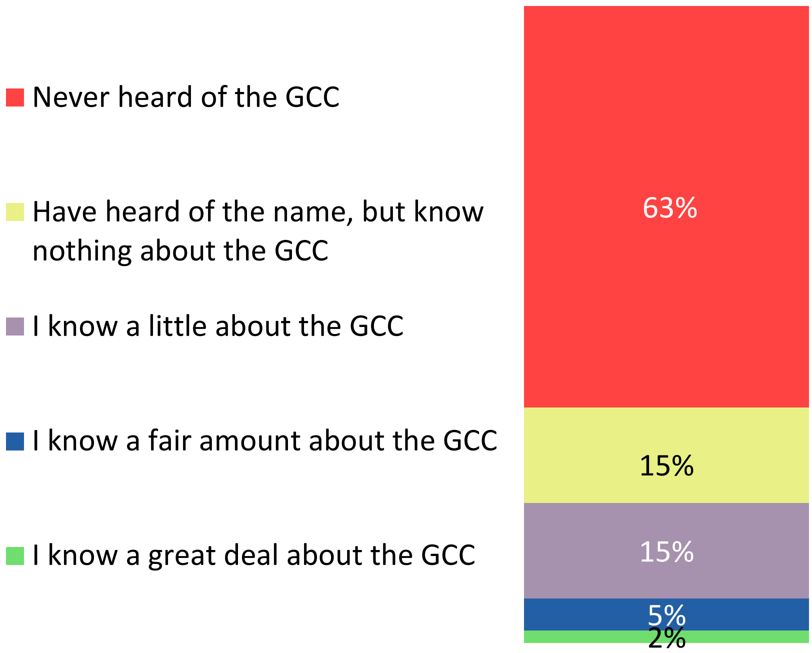
Respondents were asked about their awareness of the Gulf Cooperation Council (GCC). This question was asked for the first time at wave 5. The Gulf Cooperation Council (GCC) is a regional trade union between Saudi Arabia, the United Arab Emirates, Bahrain, Kuwait, Oman, and Qatar.

As Figure 18 shows, the majority of respondents (63%) have never heard of the Gulf Cooperation Council. A further 15% say that they have heard the name but otherwise know nothing about the GCC. Overall, around 1 in 5 (22%) know at least a little about the GCC: among these, 15% know a little about the GCC, 5% know a fair amount and just 2% know a great deal about the Gulf Cooperation Council.

The following groups are significantly more likely to know at least a little about the GCC:

- BAME respondents (36%)
- respondents aged 16 to 34 (36%)
- those based in London (32%)
- men (29%)
- those in SEG classifications AB (29%)
- and respondents educated to degree level or above (26%).

Figure 18: Awareness of the Gulf Cooperation Council (GCC)



GCC. How aware are you of the Gulf Cooperation Council (GCC)?
All respondents at wave 5 (2989)
Newly asked at wave 5

5.5.2 Support for the UK entering formal trade talks with the GCC is low, reflecting sizeable neither/nor and don't know responses rather than firm opposition.

Figure 19 shows levels of support and opposition for the UK entering into formal trade talks with the Gulf Cooperation Council (GCC). This question was also newly asked at wave 5.

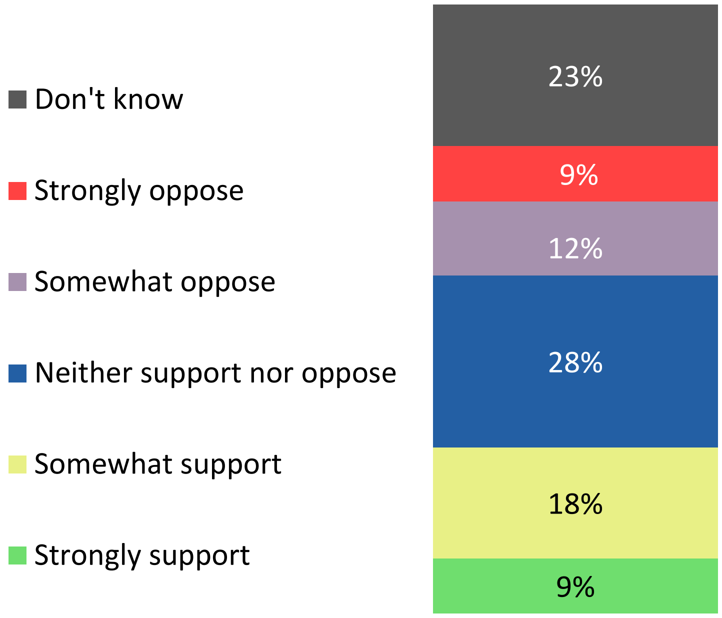
Around 3 in 10 (28%) say that they would support the UK entering into formal trade talks with the GCC, with the same proportion saying they neither oppose nor support this (28%). A similar, albeit slightly lower, proportion (22%) are opposed to the UK entering into formal trade talks with the GCC and the remainder (23%) don't know.

The following groups are more likely to oppose the UK entering into formal trade talks with the GCC:

- men (23%)
- those aged 55 to 64 (25%)
- those in the least deprived quartile (1st quartile, 26%)
- those in SEG classifications AB (29%)
- respondents in the East Midlands (29%) and Wales (30%)
- those educated to degree level or above (31%)
- and those with household incomes above £50,000 (33% for those with household incomes between £50,000 and £59,999 and 30% with household income of £60,000 and above)

It is worth noting, however, that some of these groups are also more likely to be supportive of the UK entering into formal trade talks with the GCC: those in SEG classifications AB (35%), men (34%), those with household incomes of £60,000 and above (34%), and those educated to degree level or above (33%).

Figure 19: Support for the UK entering into formal trade talks with the GCC



GCCA. The Gulf Cooperation Council (GCC) is a regional trade union between Saudi Arabia, United Arab Emirates, Bahrain, Kuwait, Oman, and Qatar. To what extent would you support or oppose the UK entering into formal trade talks with the GCC?
All respondents at wave 5 (2989)
Newly asked at wave 5

5.6 The World Trade Organisation (WTO)

5.6.1 In contrast to the GCC, awareness of the World Trade Organisation (WTO) is high with 6 in 10 saying that they know at least a little about this organisation.

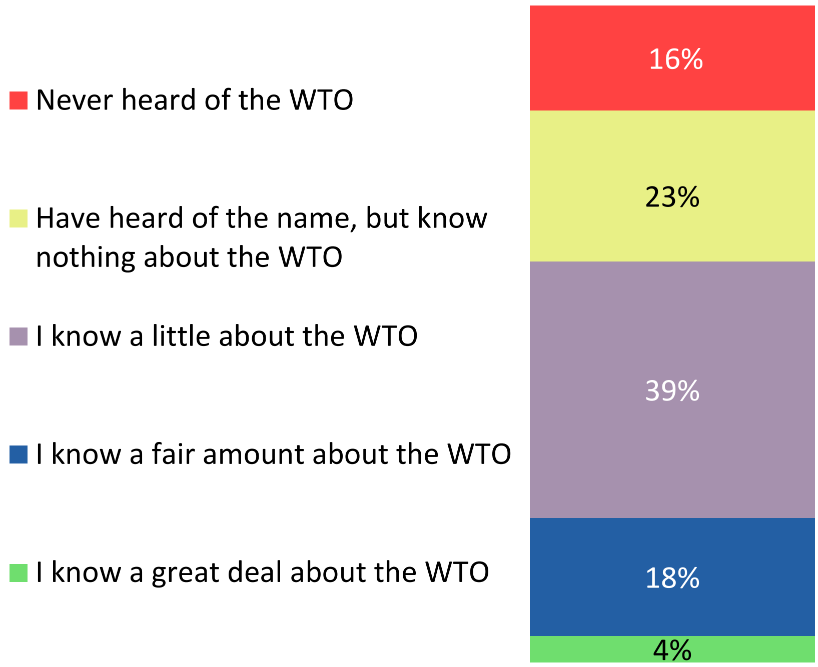
Another new question at wave 5 measured awareness of the World Trade Organisation (WTO). Results for this have been shown in Figure 20.

While knowledge of the GCC is low with 22% of respondents knowing a little about this organisation, knowledge of the WTO is higher. Six in 10 (61%) respondents know at least a little about it, and a further 23% say that they have heard of the name but otherwise know nothing about it. Just 16% say that they have never heard of the WTO.

The following groups are more likely to know at least a little about the WTO:

- those in SEG classifications AB (82%)
- those educated to degree level or above (80%)
- men (71%)
- respondents in the least deprived quartiles (1st quartile 68%, 2nd quartile 66%)
- those aged 55 and over (68%)
- and respondents based in London (69%)

Figure 20: Awareness of the World Trade Organisation (WTO)



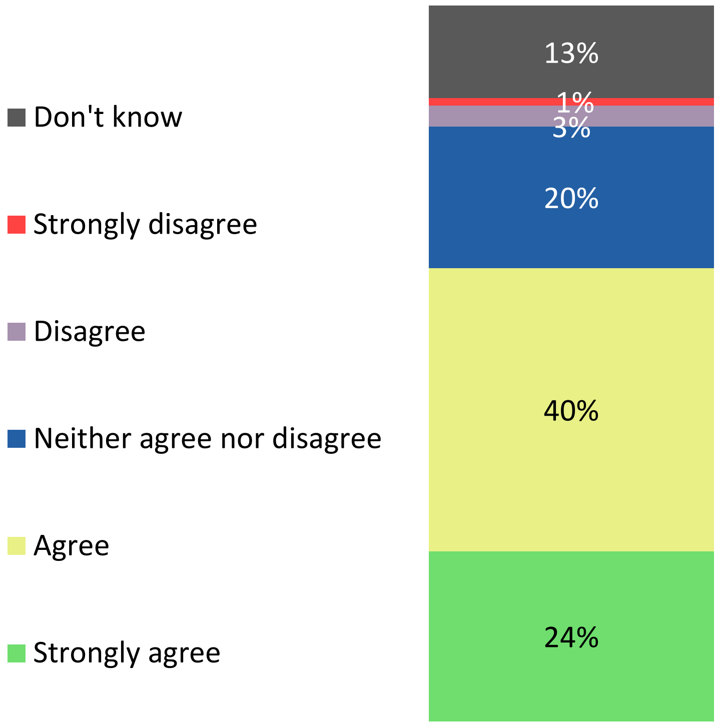
WTOKnow. How aware are you of the of the World Trade Organisation (WTO)?
All respondents at wave 5 (2989)
Newly asked at wave 5

5.6.2 Most respondents would also support the UK taking a leading role within the WTO.

Respondents were then asked about the extent to which they thought the UK should take a leading role within the World Trade Organisation (WTO). A leading role was defined as "the UK being proactive and taking a lead in influencing the negotiation and enforcement of international trade rules to promote free trade". This question was also newly asked at wave 5. The results are shown in Figure 21.

Overall, just under 2 in 3 (63%) respondents agree that the UK should take a leading role within the WTO, with 24% strongly agreeing with this. Just 4% of respondents disagree that the UK should take a leading role in this organisation, and the remainder neither agree nor disagree (20%) or don't know (13%).

Figure 21: Agreement that the UK should take a leading role within the WTO



QWTO3. To what extent do you agree or disagree that the UK should take a leading role within the World Trade Organization (WTO)? By leading role, we mean the UK being proactive and taking a lead in influencing the negotiation and enforcement of international trade rules to promote free trade.
All respondents at wave 5 (2989)
Newly asked at wave 5

5.6.3 Ensuring all countries follow the rules of international trade and protecting the environment are the top issues for the WTO to prioritise when setting new rules for international trade.

Also newly asked at wave 5, Figure 22 illustrates the top priorities for the WTO when setting new rules for international trade.

Compliance with the rules of international trade (41%) and protecting the environment (40%) come at the top of the list of issues for the WTO to prioritise when setting new rules for international trade. Conversely, trade in e-commerce and digital trade come as the lowest priority (13%).

Figure 22: Issues for the WTO to prioritise when setting rules for international trade

QWTO2. The World Trade Organization or WTO is an organisation where countries come together to discuss, agree and enforce the rules of international trade. Which, if any, of the following issues do you think the WTO should prioritise when setting new rules for international trade?
All respondents at wave 5 (2989)
Newly asked at wave 5

5.7 Attitudes towards trade

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

Using a grid format, 5 questions using a 0 to 10 scale with statements expressing opposing sentiments about liberal trade at each end were put to respondents. The results have been presented in Figure 23 and Figure 24, which show that the UK public tend to demonstrate more liberal pro-free trade attitudes rather than taking protectionist positions.

Two in 5 (43%) respondents gave a score of 7 and above, thus showing preference towards tax-free trade as an effective way for the economy and businesses to grow. Just 11% gave a score of 0 to 3 showing preference that it is best to protect our own domestic industries by applying higher taxes on imports.

Likewise, 2 in 5 (41%) gave a score of 7 and above favouring prioritising the worldwide supply of essential goods, allowing food and medicines to cross borders. Just 16% favour the notion of preventing UK goods from being exported at the other end of the scale (scores 0-3).

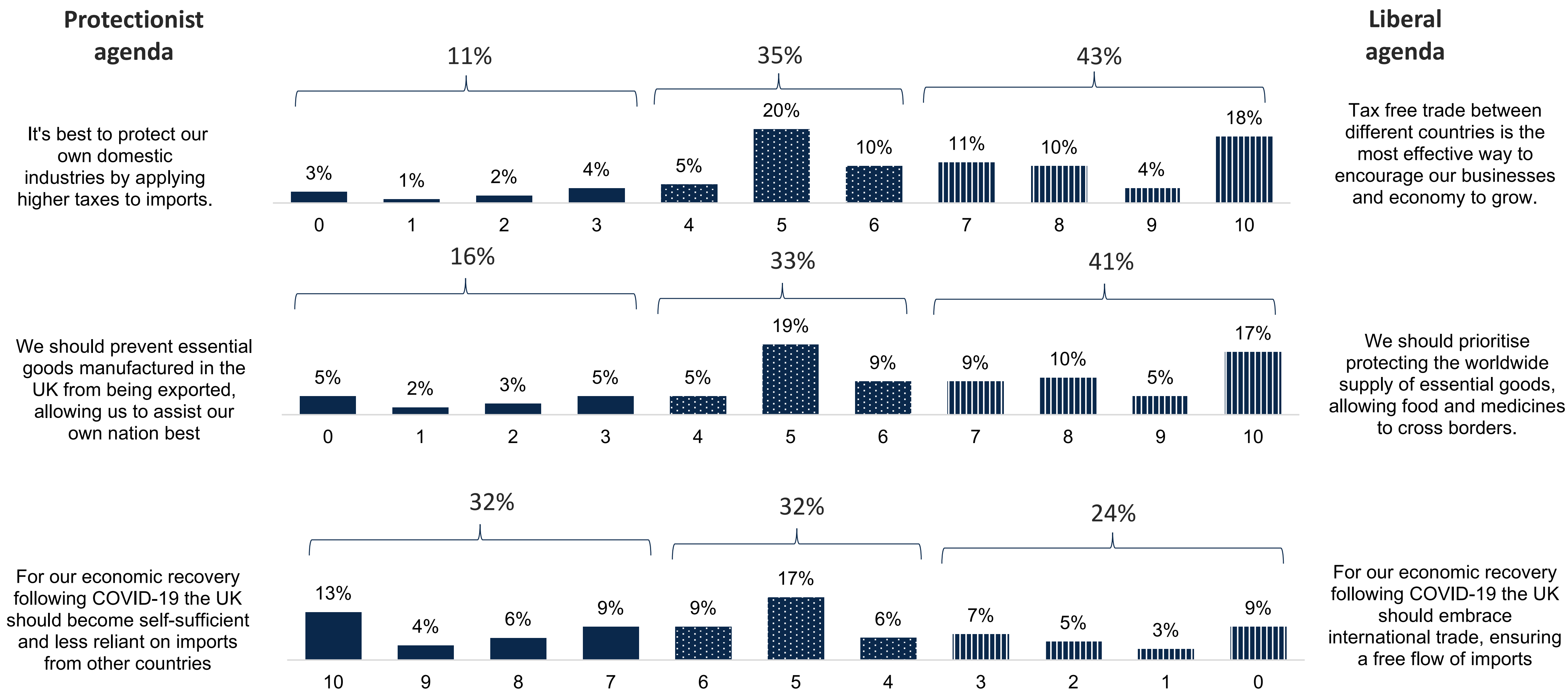
One area where there are higher levels of agreement at the protectionist end of the scale is with respect to the cross-border sharing of data. Just under half (49%) of respondents favour tight controls to be placed on the cross-border sharing of consumer data to ensure everyone's privacy is protected and data is used appropriately (giving a score between 7 and 10). Considerably fewer respondents prefer consumer data being shared freely and openly across borders to support innovation, collaboration and boost economic growth (12%)[27].

For the 3 remaining pairs of statements, protectionist and liberal sentiments are more evenly split although protectionist preferences tend to be slightly higher. A quarter (24%) show preference towards embracing international trade as part of the economic recovery following COVID-19. A slightly higher proportion (32%) are inclined to say that the UK should become more self-sufficient and less reliant on imports. Similarly, while 2 in 5 (20%) favour signing agreements with as many countries as possible, over a third (37%) are more supportive of building our own industries to supply ourselves.

In addition to this, 1 in 5 (22%) agree that the UK should embrace international trade regardless of other nations' standards of democracy and equality. However, over a third (36%) would rather have trading relationships with like-minded democracies.

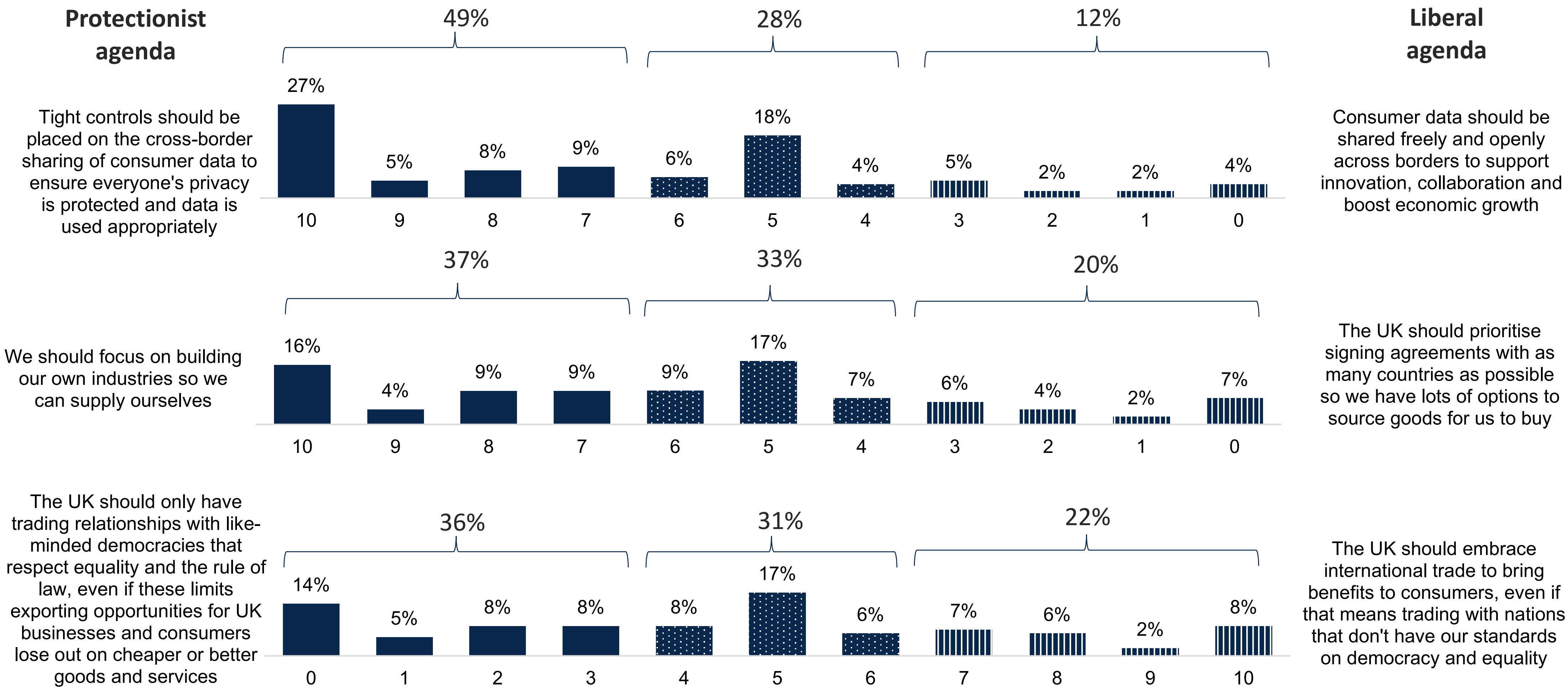
[27] The scale was 'flipped' for this statement with scores at the 'liberal' end of the scale measured by combining the total number of respondents selecting between 0 and 3.

Figure 23: 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 (2989).
*Figures for don't know are not shown to ease reading

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



CV2: Here are some pairs of statements. Please indicate where your own view lies on a 10-point scale where 0 means complete agreement with the statement on the left, 10 means complete agreement with the statement on the right, and 5 means you don’t agree with either of the statements or that your views are mixed or balanced on the issue in question. Unweighted base size: all respondents (2989)
*Figures for don’t know are not shown to ease reading

5.7.2 Protectionist sentiment has increased since wave 4, although this does not always result in a corresponding decline in liberal sentiment.

Building on the results from Figure 23 and Figure 24, Table 5 shows the differences in levels of protectionism and liberalism between waves 3, 4 and 5[28].

As shown below, protectionist positions have increased compared to wave 4. A significantly higher proportion of respondents prefer higher taxes for imports (11% versus 8% at wave 4), preventing UK goods being exported (16% versus 13%) and building our own industries to supply ourselves (37% versus 33% at wave 3).

This, however, does not necessarily mean that the UK public's views have become less liberal. Liberal sentiments have only declined in relation to tax free trade to encourage economic and business growth compared to wave 4 (43%, compared to 47% at wave 4) but this is now in line with wave 3 (43%).

[28] The pairs of statements that have not been included in Table 5 were not asked at wave 4 so comparisons cannot be made.

Table 5: Protectionist versus liberal free trade attitudes - differences between wave 3, 4 and wave 5

Question scale	Question scale	Protectionist sentiment	Protectionist sentiment	Protectionist sentiment	Liberal sentiment	Liberal sentiment	Liberal sentiment
Protectionist end	Liberal end	Wave 3	Wave 4	Wave 5	Wave 3	Wave 4	Wave 5
It's best to protect our own domestic industries by applying higher taxes to imports	Tax free trade between different countries is the most effective way to encourage our businesses and economy to grow	12%	8% ⇩	11% ⇧	43%	47% ⇩	43%
We should prevent essential goods manufactured in the UK from being exported, allowing us to assist our own nation best	We should prioritise protecting the worldwide supply of essential goods, allowing food and medicines to cross borders	18%	13% ⇩	16%	40%	41%	41%
We should focus on building our own industries so we can supply ourselves	The UK should prioritise signing agreements with as many countries as possible so we have lots of options to source goods for us to buy	Not asked	33%	37% ⇧	Not asked	21%	20%
For our economic recovery following Covid-19 the UK should become self-sufficient and less reliant on imports from other countries	For our economic recovery following Covid-19 the UK should embrace international trade, ensuring a free flow of imports and exports of goods and services	35%	29% ⇩	32% ⇧	27%	26%	24%
Tight controls should be placed on the cross-border sharing of consumer data to ensure everyone's privacy is protected and data is used appropriately	Consumer data should be shared freely and openly across borders to support innovation, collaboration and boost economic growth	Not asked	50%	49%	Not asked	12%	12%

CV2: Here are some pairs of statements. Please indicate where your own view lies on a 10-point scale where 0 means complete agreement with the statement on the left, 10 means complete agreement with the statement on the right, and 5 means you don't agree with either of the statements or that your views are mixed or balanced on the issue in question Base: all respondents (Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989)

6 Trading partner preferences

6.1 Support for establishing free trade agreements with specific countries

6.1.1 Support for trade deals with China and Saudi Arabia is lower than for most other nations. Whilst support for establishing FTAs with Brazil and the UAE is also quite low, levels of support outweigh opposition.

Respondents were presented with 7 non-EU countries and asked to what extent they would support or oppose the UK establishing a free trade agreement with them. Four countries put to respondents remained identical to those asked about in waves 1 to 4; Brazil, UAE and Saudi Arabia were added at wave 4. The findings are presented in Table 6.

Securing a free trade agreement with New Zealand and the USA still draws widespread support (62% and 57% respectively). Opposition to trade with these countries is also low (6% and 12% respectively). Instead, it is the proportions who neither support nor oppose and the proportion who are unsure that are higher than opposition. Whilst less than half support a free trade agreement with India (40%), Brazil (31%) and UAE (29%), support is still higher than opposition. However, there is no difference between support and opposition when it comes to China and Saudi Arabia (0 percentage point difference respectively).

Table 6: Support and opposition for establishing free trade agreements

	New Zealand	USA	India	China	Brazil	UAE	Saudi Arabia
Strongly support	31%	27%	13%	10%	9%	9%	8%
Somewhat support	31%	30%	27%	19%	22%	21%	17%
Neither support nor oppose	18%	17%	29%	25%	34%	31%	30%
Somewhat oppose	4%	8%	10%	16%	9%	12%	13%
Strongly oppose	2%	5%	5%	14%	6%	9%	12%
Don't know	15%	14%	16%	15%	19%	19%	19%
Summary: support	62%	57%	40%	30%	31%	29%	26%
Summary: oppose	6%	12%	15%	30%	15%	21%	26%
NET score	+57%	+45%	+25%	+*%	+16%	+9%	+*%

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 (2989)

6.1.2 Support for an FTA with New Zealand, the USA and India remains stable. However, support for an FTA with China has dipped since wave 4.

Figure 25 shows how support for free trade agreements with individual countries has changed over the waves. Two in 3 (62%) respondents support free trade agreements with New Zealand, in line with wave 4 (64%). For the USA and India, support has also remained stable compared to wave 4 (57% at waves 4 and 5 respectively for the USA and 40% at both waves for India). The downward trend in support for FTAs with India was stopped at wave 4.

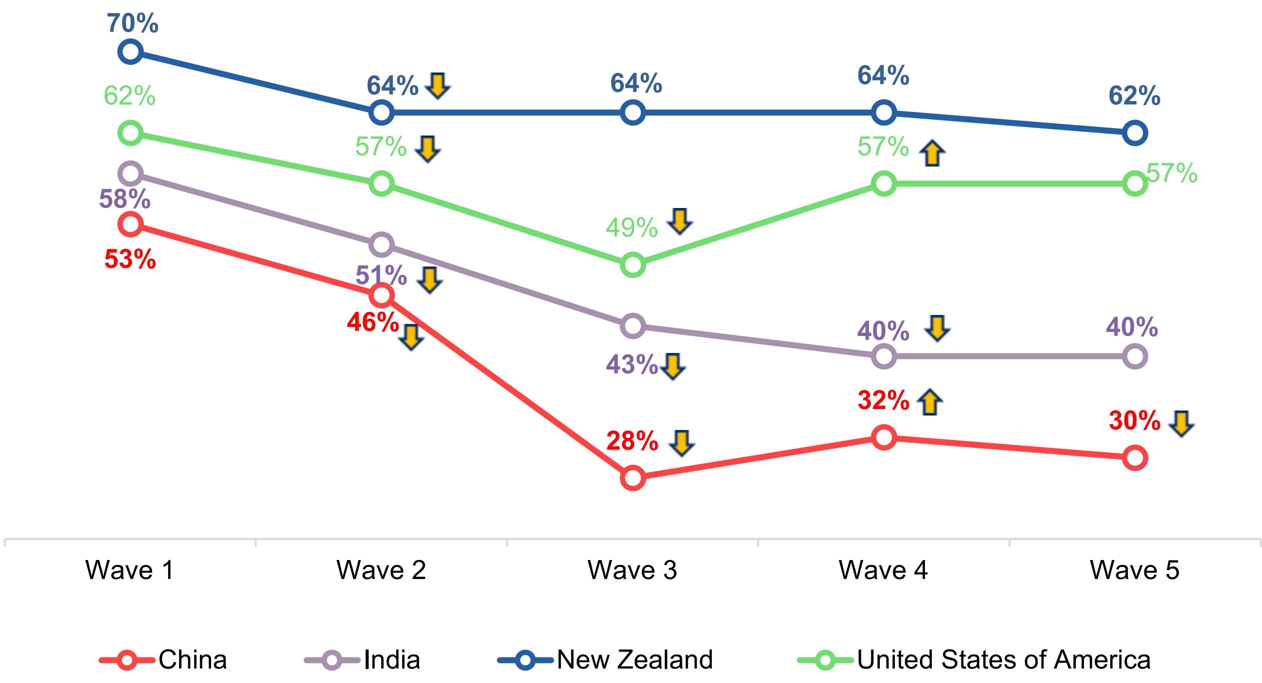
However, support for an FTA with China has slightly decreased compared to wave 4 (32% in wave 4 and 30% in wave 5). There are no significant increases in opposition, don't knows or neither support nor oppose compared to wave 4.

The following groups are significantly less likely to support the UK establishing an FTA with China: respondents with no qualifications (19%), those living in Wales (19%), those aged 75+ (24%), women (24%), and those in SEG classifications DE (25%). It is worth noting, however, that these groups are not necessarily more likely to be opposed to a trade deal with China. With the exception of those aged 75+ who are indeed more likely to be opposed (38%), the rest of the groups are more likely to be either unsure or neither support nor oppose.

Support for an FTA with India is also lower among the following demographics:

- those with no qualifications (26%)
- those living in Wales (29%)
- those in SEG classifications DE (30%)
- those living in Northern Ireland (31%)
- those living in the West Midlands (32%)
- women (33%)
- those living in the North West (34%)
- those aged 35 to 44 (34%)
- and those in the most deprived quartile (35%)

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 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave = 4009, Wave 5 = 2989).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

6.1.3 Levels of support for a trade agreement with the USA are in line with wave 4.

As Figure 26 shows, support for establishing a free trade agreement with the USA has remained stable after an increase at wave 4[29]. Following an increase to 57% at wave 4, support for an FTA with the USA has remained consistent at wave 5 (57%).

Looking at results by demographics, the following groups are significantly more likely to say they support establishing an FTA with the USA:

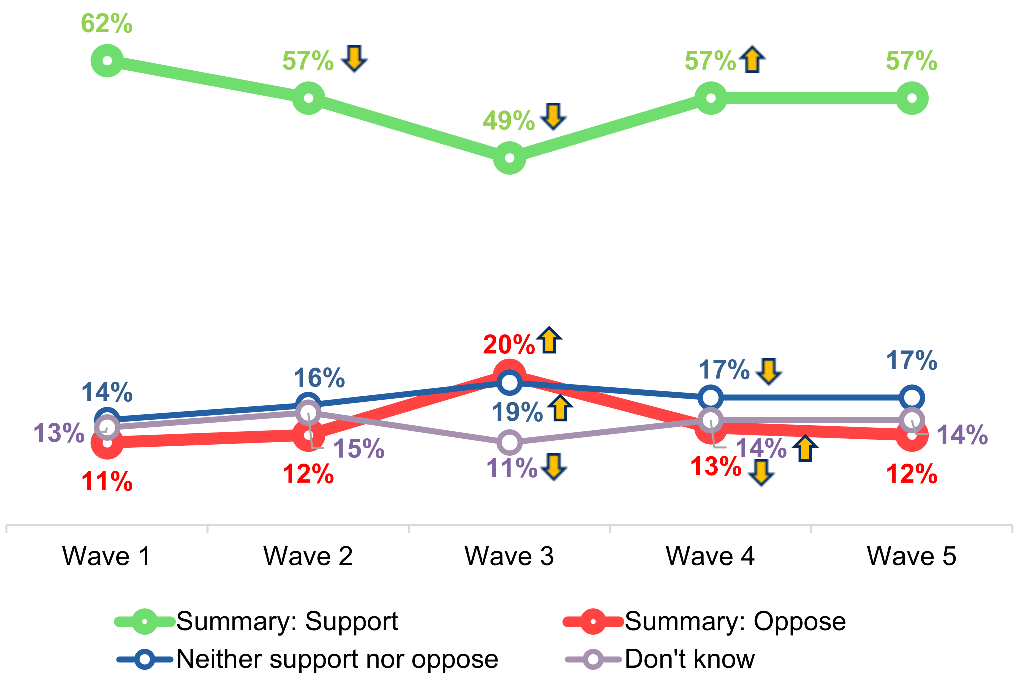
- those with a household income over £60,000 (70%)
- those in SEG classifications AB (68%)
- those aged 55+ (66%)
- those in the East Midlands (66%)
- men (65%)
- those in Yorkshire and the Humber (64%)
- those educated to degree level or above (61%)
- those with qualifications below degree level (59%)
- and White respondents (59%)

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

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

- those in SEG classifications AB (15%)
- those educated to degree level or above (17%)
- those aged 16 to 24 (17%)
- respondents living in London (17%)
- and BAME respondents (18%)

Figure 26: Support and opposition to the UK establishing a free trade agreement with USA



TP2. To what extent would you support or oppose the UK establishing a free trade agreement with each of the following countries?
Unweighted base sizes: all respondents (Wave 1 = 2400, Wave 2 = 2349, Wave 3 = 3224, Wave 4 = 4009, Wave 5 = 2989).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

6.1.4 Support for an FTA with Brazil has decreased compared to wave 4. When it comes to UAE and Saudi Arabia, support for FTAs remains low albeit stable since wave 4.

Since wave 4, respondents have been asked about the extent to which they would support or oppose the UK establishing free trade agreements with Brazil, United Arab Emirates and Saudi Arabia (see Figure 27).

Support for a free trade deal with the United Arab Emirates and Saudi Arabia has remained stable compared to wave 4, with 29% and 26% of respondents respectively stating that they would support a free trade agreement with these countries.

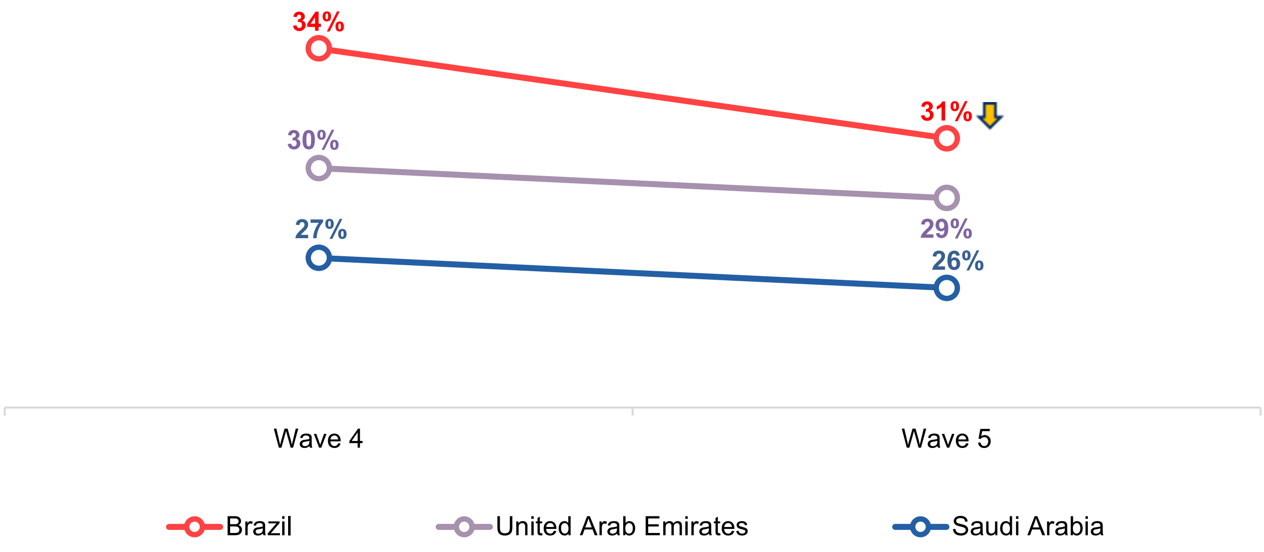
Support for an FTA with Brazil has declined compared to the previous wave from 34% at wave 4 to 31% at wave 5. This has been accompanied by a significant increase in the proportion who strongly oppose an FTA with Brazil from 4% at wave 4 to 6% at wave 5.

Support for an FTA with Brazil has decreased significantly among the following groups:

- those living in the West Midlands (-11 percentage points, from 37% at wave 4 to 26% at wave 5)
- those living in Wales (-10 percentage points, from 33% at wave 4 to 23% at wave 5)
- those in SEG classifications C1C2 (-6 percentage points, from 37% at wave 4 to 31% at wave 5)
- men (-3 percentage points, from 40% at wave 4 to 37% at wave 5)
- and White respondents (-3 percentage points, from 34% at wave 4 to 31% at wave 5)

However, opposition among these groups has not increased, instead they are now more likely to say that they neither support nor oppose an FTA with Brazil or that they are unsure.

Figure 27: Changes in support for establishing free trade agreements with Brazil, UAE and Saudi Arabia



TP2. To what extent would you support or oppose the UK establishing a free trade agreement with each of the following countries? Asked from wave 4.
Unweighted base sizes: all respondents (Wave 4 = 4009, Wave 5 = 2989).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

6.2 Support for enhancing existing free trade agreements

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

Respondents were shown 4 non-EU countries with which the UK already has trade agreements in place and were asked the extent to which they would support or oppose enhancing the existing FTAs with these countries.

As Table 7 shows, support for enhancing the existing trade deal with Canada is high, with 3 in 5 (63%) respondents in support and just 5% saying that they are opposed. Around 2 in 5 (46%) are supportive when asked about Singapore and around 1 in 3 show support when asked about Mexico (39%) and Vietnam (35%).

Table 7: Support and opposition for enhancing existing free trade agreements

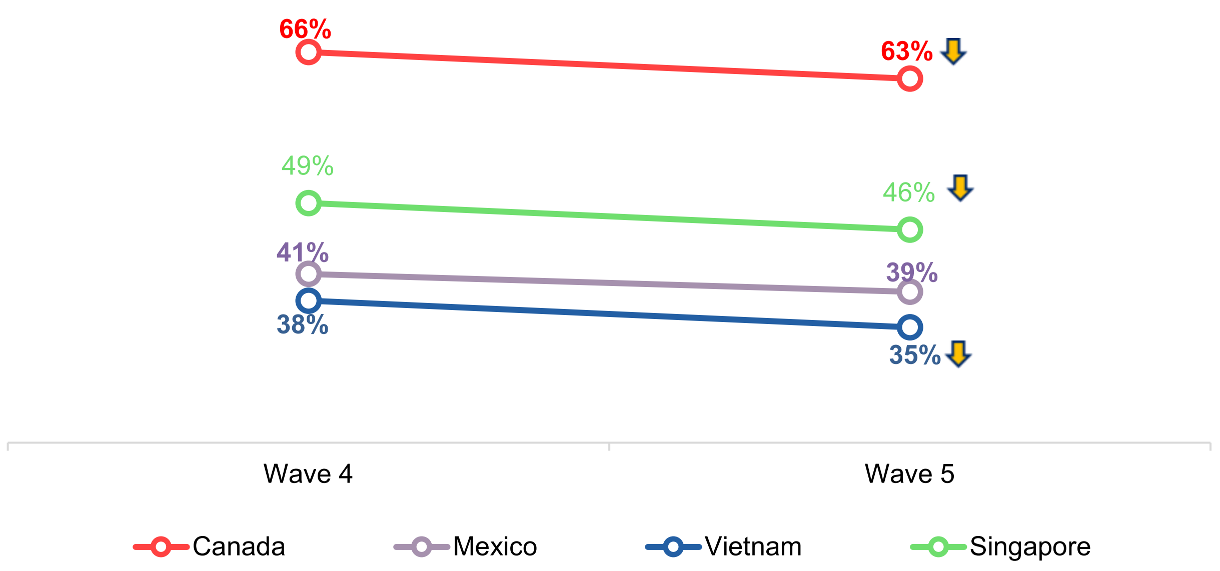
	Canada	Singapore	Mexico	Vietnam
Strongly support	31% ↓	18% ↓	12%	11% ↓
Somewhat support	32% ↑	28%	27%	25%
Neither	17%	28% ↑	35% ↑	35% ↑
Somewhat oppose	4% ↑	5%	6%	7%
Strongly oppose	1%	3%	3%	4% ↑
Don't know	15%	18%	18%	19%
Summary: Support	63% ↓	46% ↓	39%	35% ↓
Summary: Oppose	5% ↑	8%	9%	11%
NET score	+58%	+38%	+30%	+24%

TP2i. The UK has trade agreements with some countries already. To what extent would you support or oppose the UK enhancing existing free trade agreements with the following countries? Unweighted base sizes: all respondents (2989)

6.2.2 Support for enhancing the existing trade deal with Canada, Singapore and Vietnam has declined compared to wave 4.

Support for enhancing existing free trade deals with Canada, Singapore and Vietnam has declined by 3 percentage points in each instance compared to wave 4, whereas support in relation to Mexico has remained stable (see Figure 28). Opposition for enhancing the existing trade deals with Canada, Singapore and Vietnam has not increased, instead there has been an increase in the proportion who are unsure.

Figure 28: Changes in support for enhancing existing free trade deals with a selection of countries



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

Support for enhancing the existing trade deal with Singapore has decreased significantly among the following sub-groups. However, it is worth nothing these sub-groups have not become more opposed to enhancing the existing trade deal with these countries but they are now more likely to say that they neither support nor oppose or that they are unsure.

- those aged 75+ (-11 percentage points, from 64% at wave 4 to 53% at wave 5)
- those living in Wales (-9 percentage points, from 45% at wave 4 to 36% at wave 5)
- respondents with qualifications below degree level (-8 percentage points, from 60% at wave 4 to 52% at wave 5)
- respondents aged 35 to 54 (-7 percentage points, from 50% at wave 4 to 43% at wave 5)
- those in SEG classifications C1C2 (-5 percentage points, from 50% at wave 4 to 45% at wave 5)
- those with qualifications at degree level or above (-5 percentage points, from 61% at wave 4 to 56% at wave 5)
- those living in the South of England (-4 percentage points, from 52% at wave 4 to 48% at wave 5)
- and men (-3 percentage points, from 57% at wave 4 to 54% at wave 5)

For Canada, support has decreased among the following groups:

- those aged 35 to 44 (-9 percentage points, from 61% at wave 4 to 52% at wave 5)
- respondents with qualifications below degree level (-10 percentage points, from 79% at wave 4 to 69% at wave 5)
- those with qualifications at degree level or above (-7 percentage points, from 79% at wave 4 to 72% at wave 5)
- White respondents (-3 percentage points, from 68% at wave 4 to 65% at wave 5)
- those in SEG classifications C1C2 (-6 percentage points, from 68% at wave 4 to 62% at wave 5)
- those in SEG classifications AB (-3 percentage points, from 80% at wave 4 to 77% at wave 5)

And for Vietnam, support has decreased among the following groups:

- respondents with qualifications below degree level (-17 percentage points, from 52% at wave 4 to 35% at wave 5)
- those aged 35 to 44 (-8 percentage points, from 37% at wave 4 to 29% at wave 5)
- those in SEG classifications AB (-6 percentage points, from 51% at wave 4 to 45% at wave 5)
- those aged 55+ (-5 percentage points, from 42% at wave 4 to 37% at wave 5)
- those with qualifications at degree level or above (-5 percentage points, from 49% at wave 4 to 44% at wave 5)
- White respondents (-3 percentage points, from 39% at wave 4 to 36% at wave 5)

6.3 Trade agreement priorities

6.3.1 Maintaining food standards is the highest priority when negotiating free trade deals with USA, India and Mexico. While maintaining food standards is also an important consideration for UAE and Saudi Arabia, protecting human rights and equality is the highest priority for these 2 countries.

Respondents were asked to think about what considerations the UK Government should give priority to when negotiating free trade agreements with the USA, India, UAE, Saudi Arabia and Mexico. In previous waves, respondents were asked about Australia, New Zealand, and the USA. In wave 5, Australia and New Zealand were removed, while India, UAE, Saudi Arabia and Mexico were added. Additionally, some new priority options were added and others removed.

At wave 5, respondents were shown 3 of these 5 countries at random, compared to previous waves when there were 3 countries in total shown to all respondents. These changes make tracking for this question difficult.

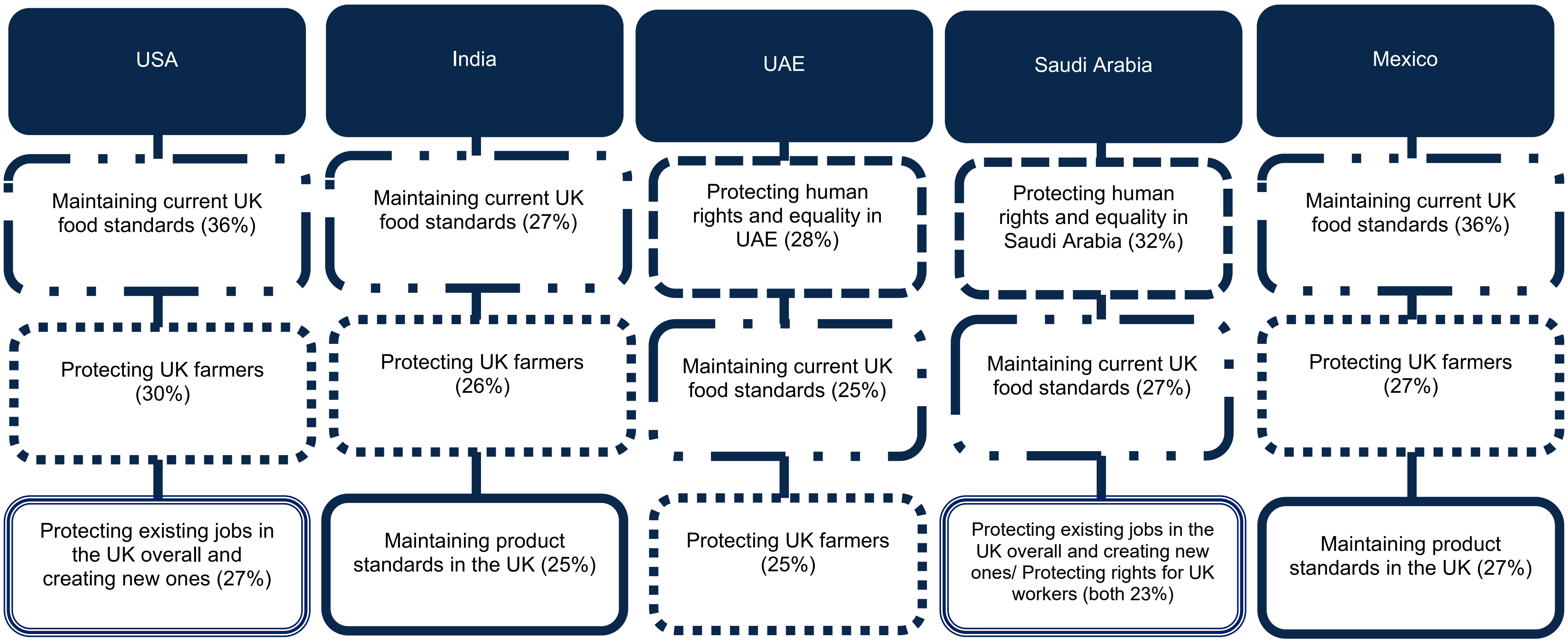
For each of the countries, respondents could select up to 3 considerations they saw as highest priority from a prompted list. The top 3 most frequently selected considerations for each country are presented in Figure 29.

Maintaining current UK food standards was selected as important irrespective of the country in question. This comes as the top priority for USA, India and Mexico and the second highest priority for *UAE and Saudi Arabia. For UAE and Saudi Arabia, the top priority is protecting human rights and equality (32% selected this for Saudi Arabia and 28% for UAE).*

There are further differences between priorities depending on the country (see Figure 30, Figure 31 and Figure 32). Protecting existing jobs in the UK and creating new ones comes as the third highest priority for the USA (27%) and Saudi Arabia (23%). Meanwhile, the third top priority for India and Mexico is maintaining product standards in the UK (25% and 27% respectively).

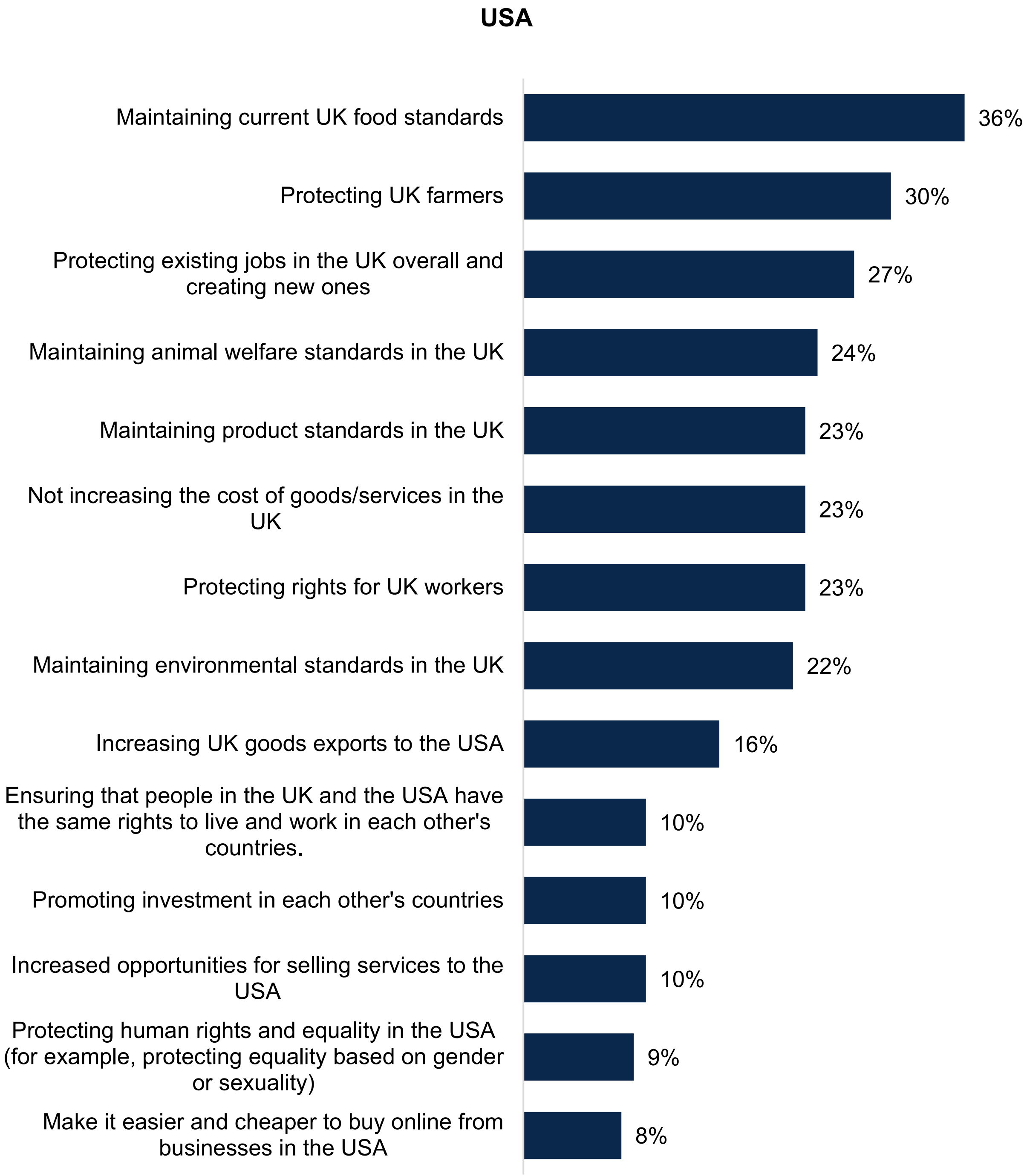
The USA is the only country that can be compared to wave 4 as it was also asked about then. Maintaining UK food standards continues to be a top priority in relation to the USA.

Figure 29: Top 3 priorities when negotiating free trade agreements



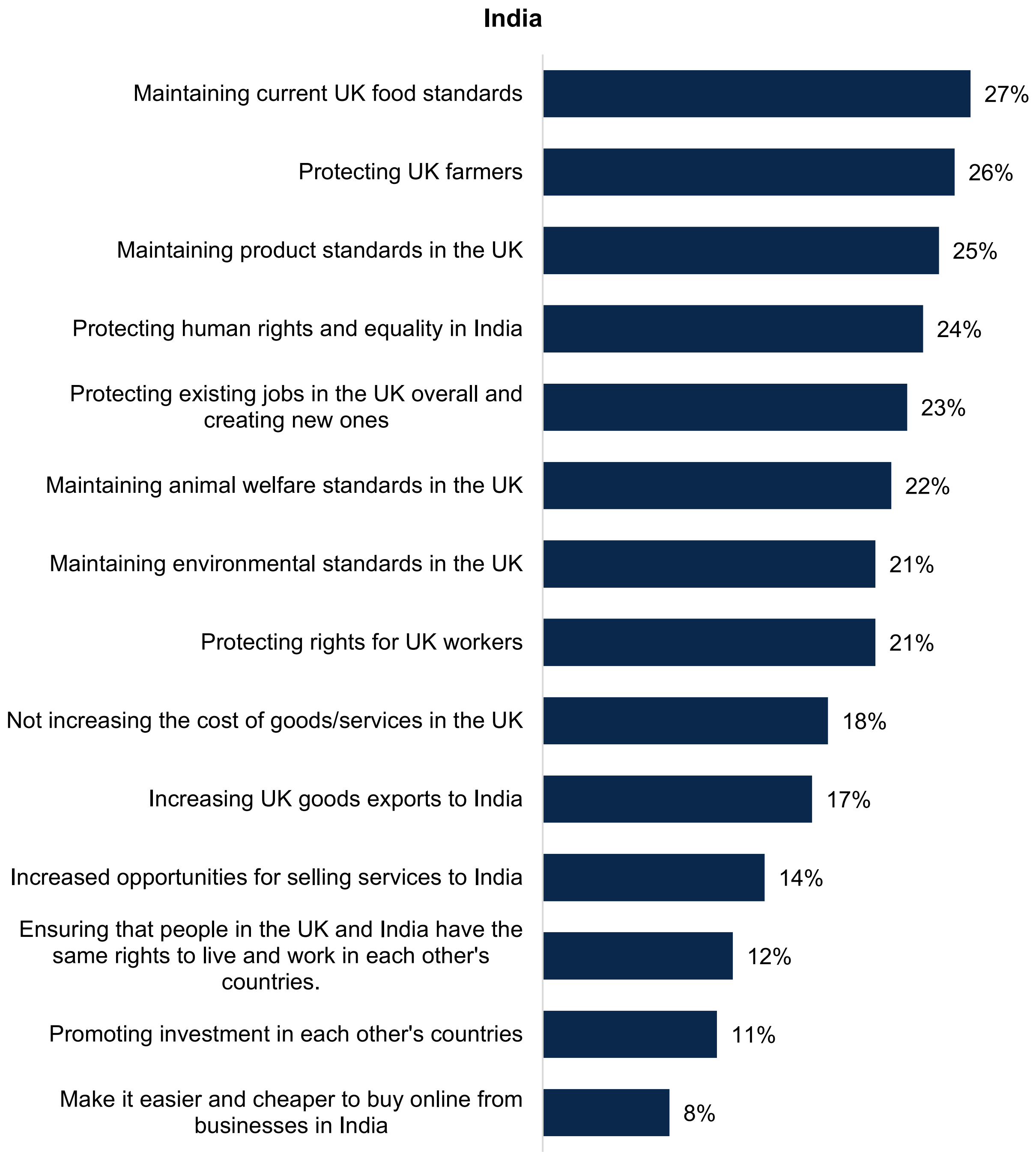
TP2c. Please select up to three considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with the following countries? Base: Each respondent was shown 3 countries – base for each country: USA (1800), India (1825), UAE (1804), Saudi Arabia (1827), Mexico (1747)

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



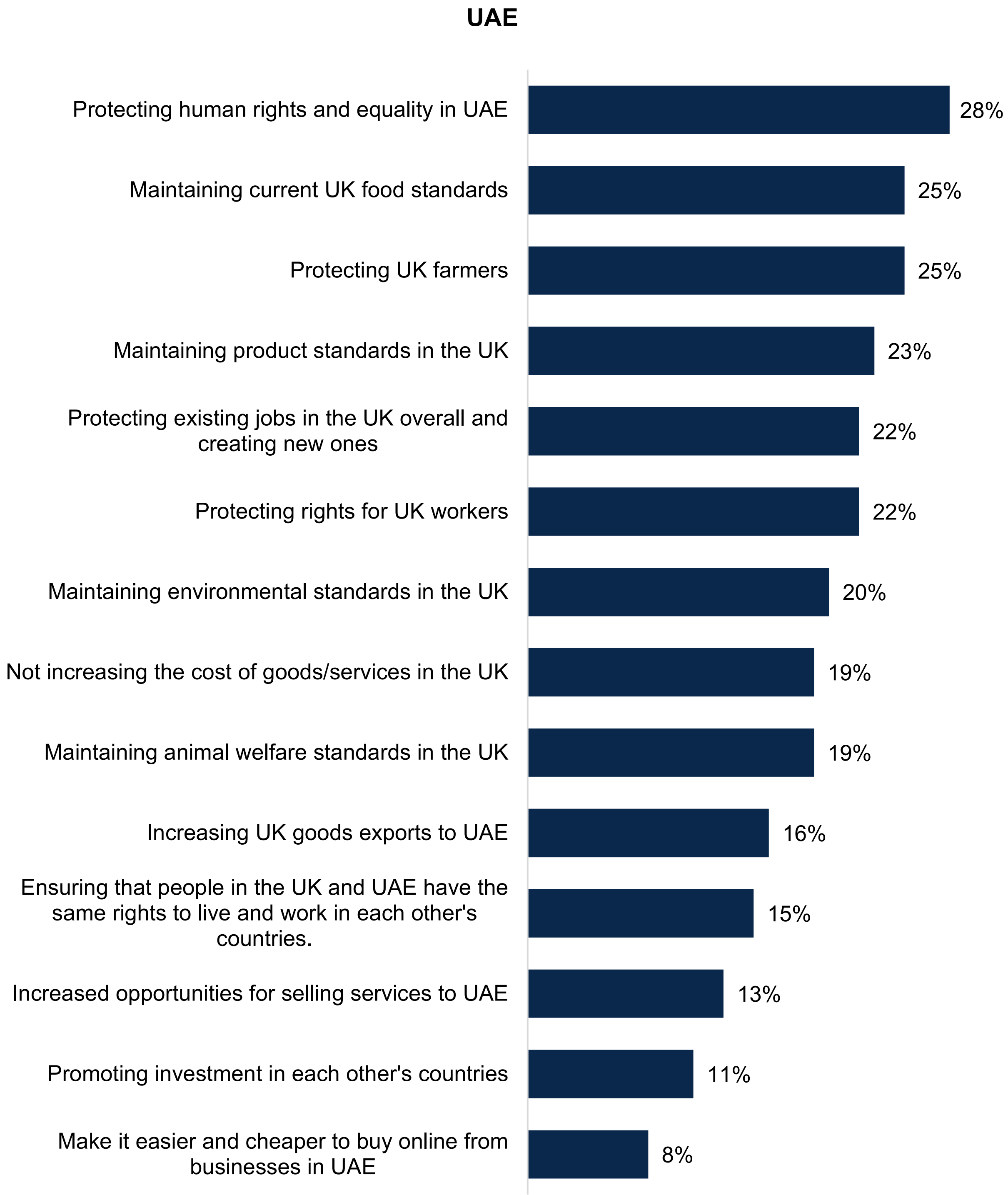
TP2c. Please select up to three considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with the following countries? Base: Each respondent was shown 3 countries – base: (1800)

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



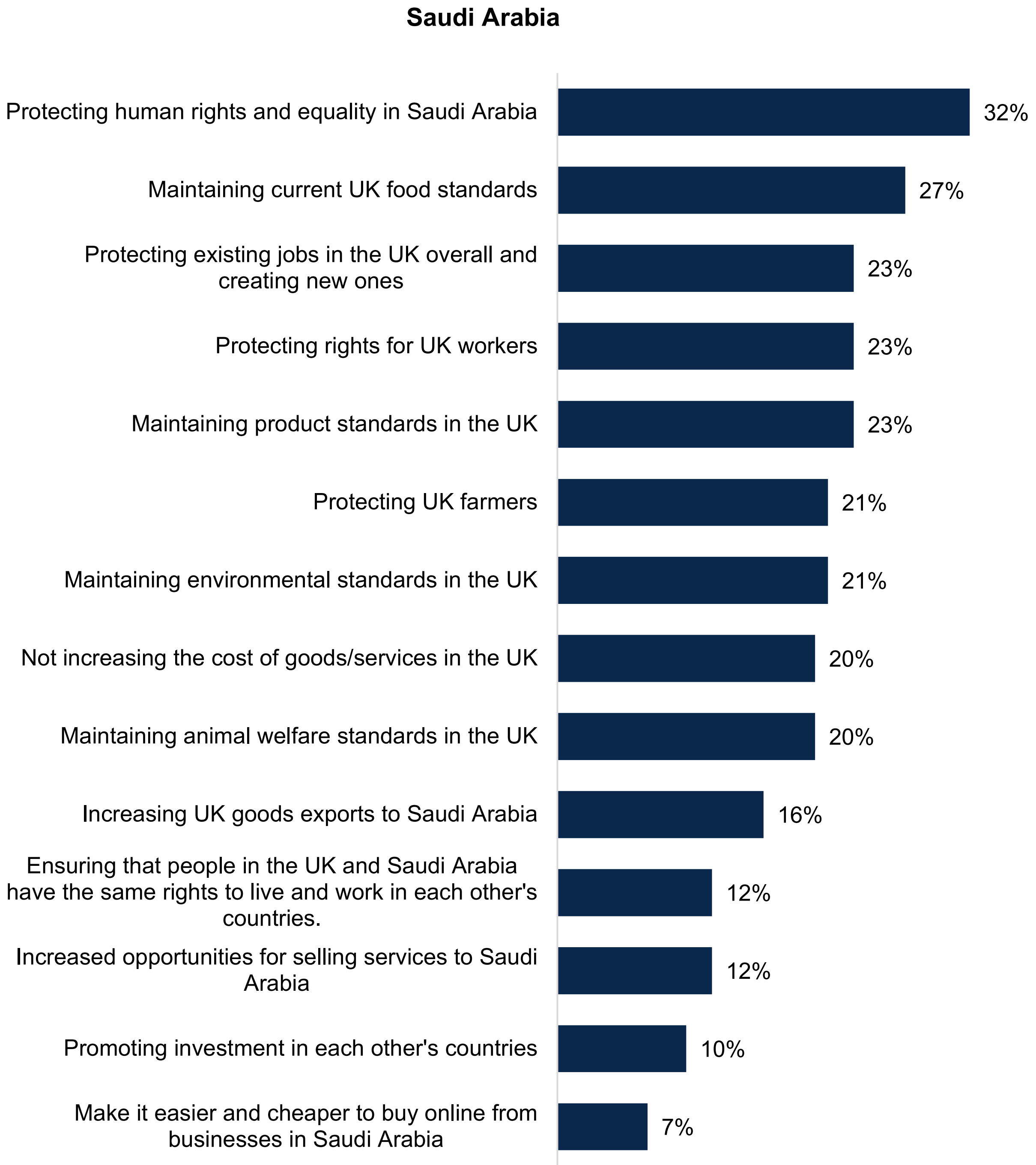
TP2c. Please select up to three considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with the following countries? Base: Each respondent was shown 3 countries – base: (1825)

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



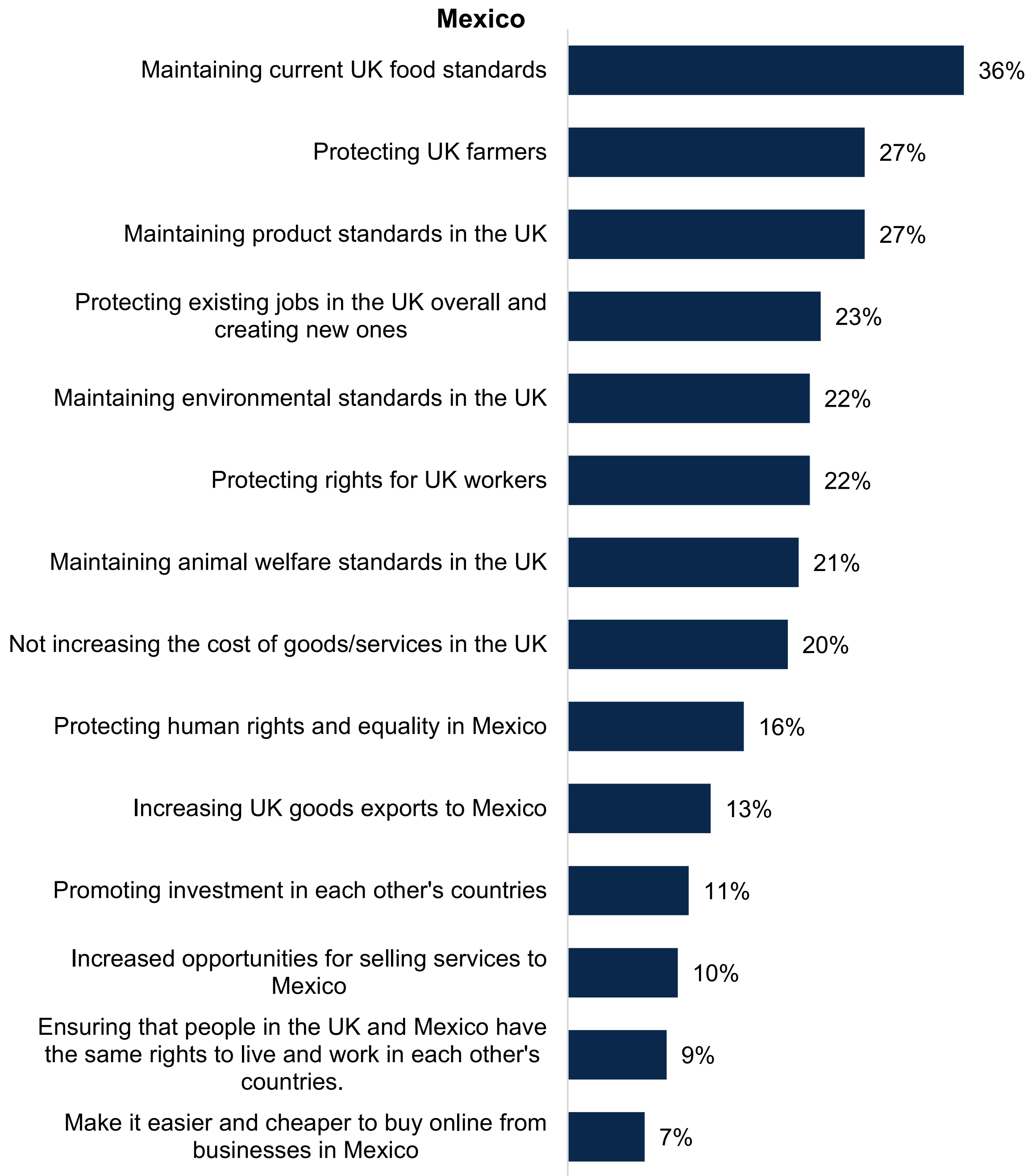
TP2c. Please select up to three considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with the following countries? Base: Each respondent was shown 3 countries – base: (1804)

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



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? Base: Each respondent was shown 3 countries – base: (1827)

Figure 34: Considerations to be given the highest priority when negotiating free trade agreements with Mexico



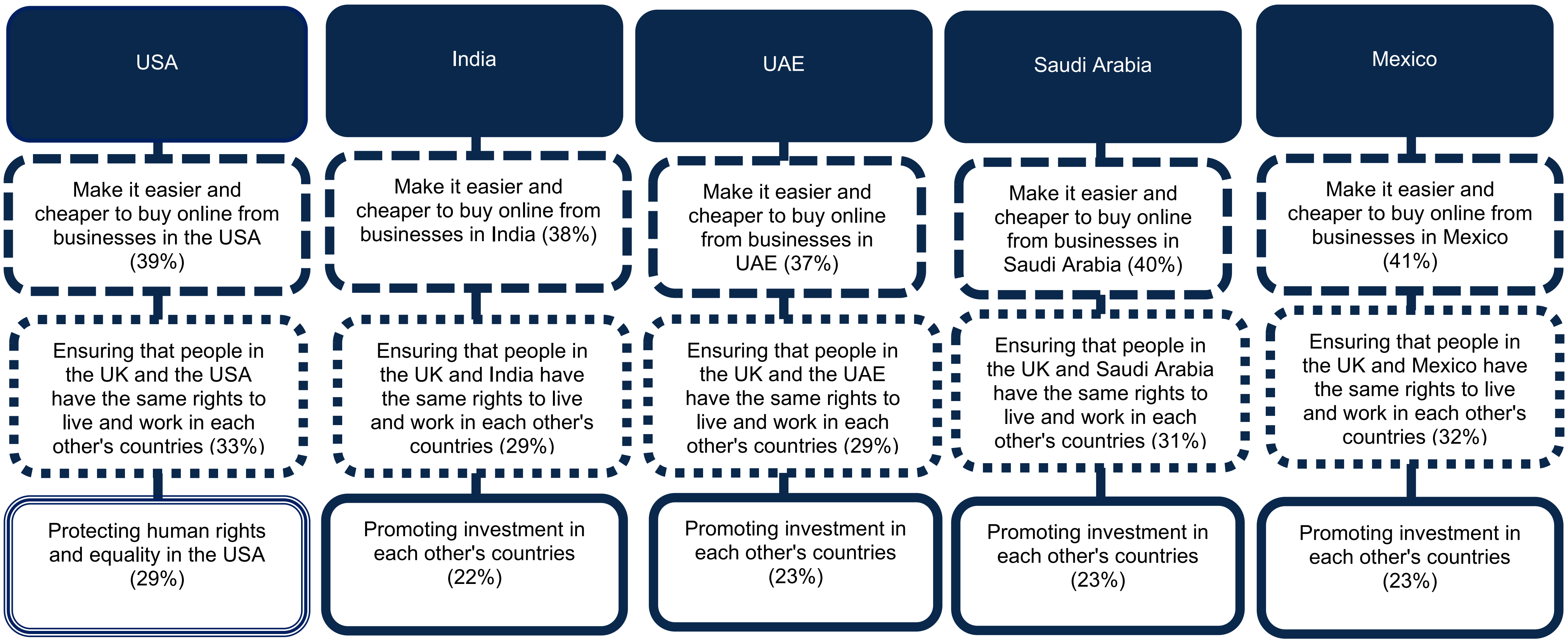
TP2c. Please select up to three considerations you think the UK government should be giving the highest priority to when negotiating free trade agreements with the following countries? Base: Each respondent was shown 3 countries – base: (1747)

6.3.2 There are high levels of consistency across the 5 countries as to which considerations should be given the lowest priority.

Respondents were also asked which 3 considerations they think the Government should give the lowest priority to when negotiating free trade agreements (see Figure 33). Respondents were asked to select from the same list of options, excluding those they had given the highest priority to. As with the question around highest priorities, respondents were shown 3 of the 5 countries at random.

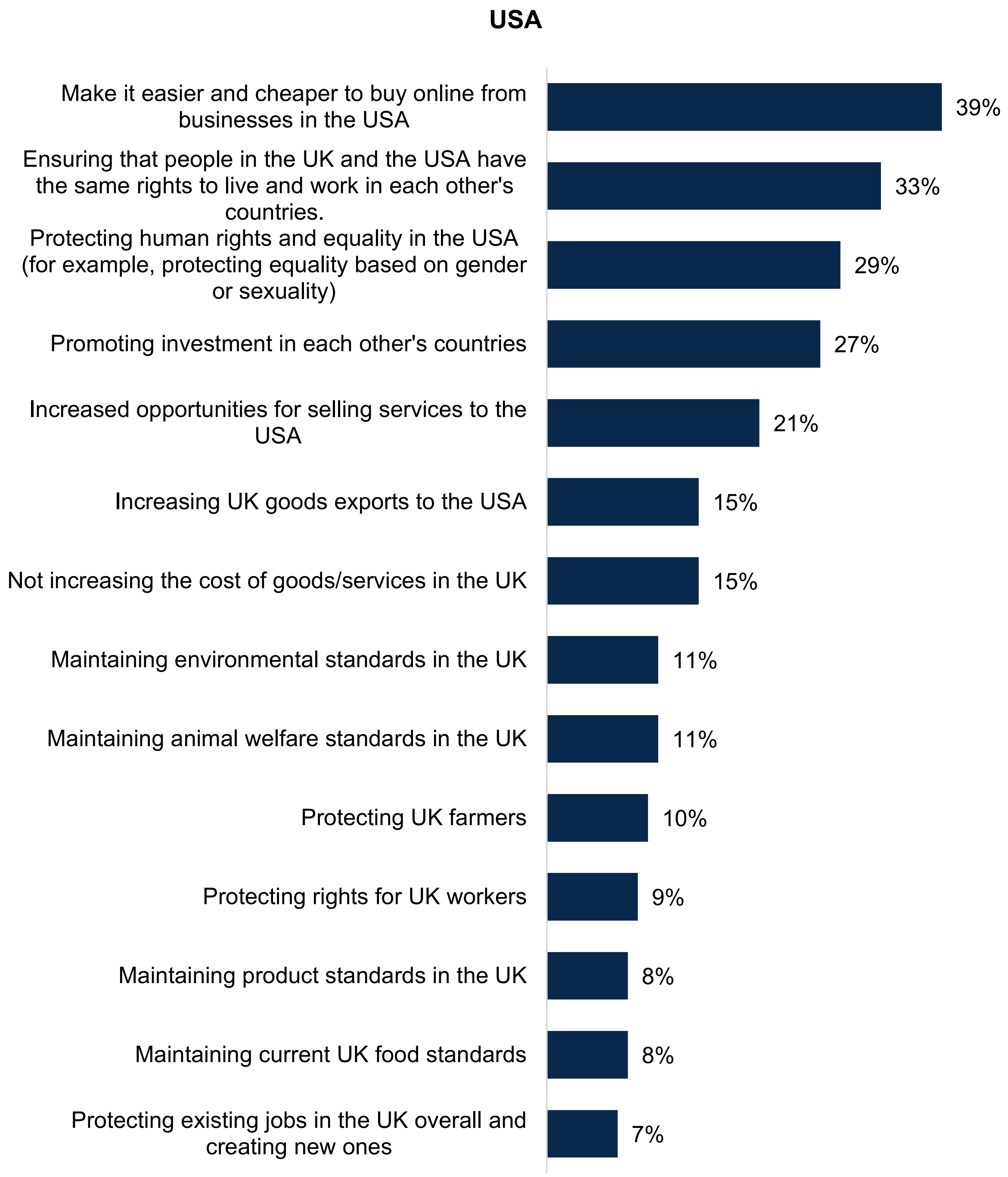
As shown in Figure 35, for each of the listed countries 3 considerations were consistently selected by the majority of respondents as the lowest priorities. These were making it easier and cheaper to buy online from each country, having the same rights to live and work in each other's countries and promoting investment in each other's countries. For the USA, however, the third lowest priority was protecting human rights and equality in the USA rather than promoting investment in each other's countries. Promoting human rights and equality is not among the lowest 3 priorities for the other 4 countries.

Figure 35: Lowest priorities when negotiating free trade agreements



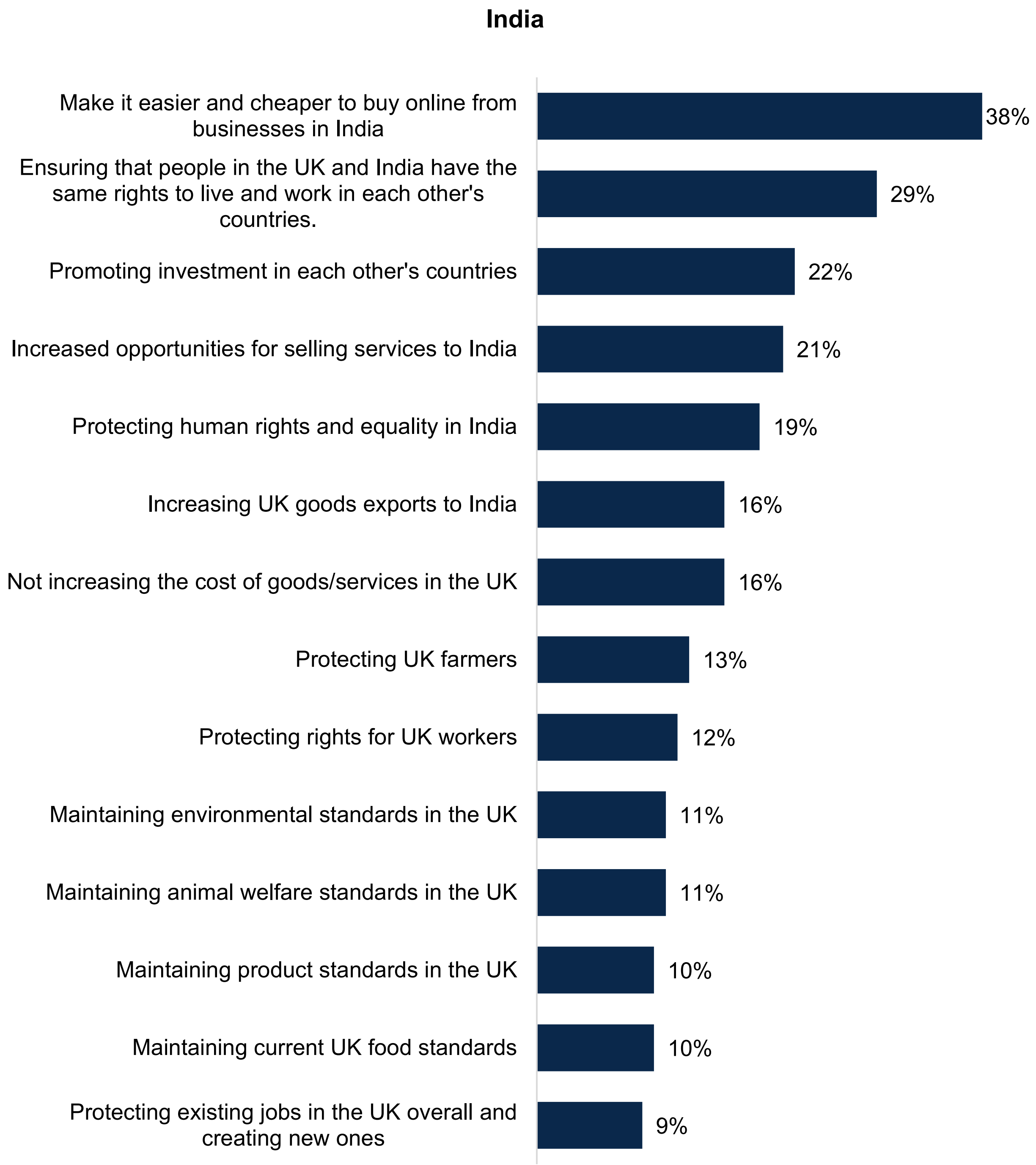
TP2d. Please select up to three considerations you think the UK government should be giving the lowest priority to when negotiating free trade agreements with the following countries? Base: Each respondent was shown 3 countries – base for each country: USA (1799), India (1825), UAE (1804), Saudi Arabia (1826), Mexico (1745)

Figure 36: Considerations to be given the lowest priority when negotiating free trade agreements with the USA



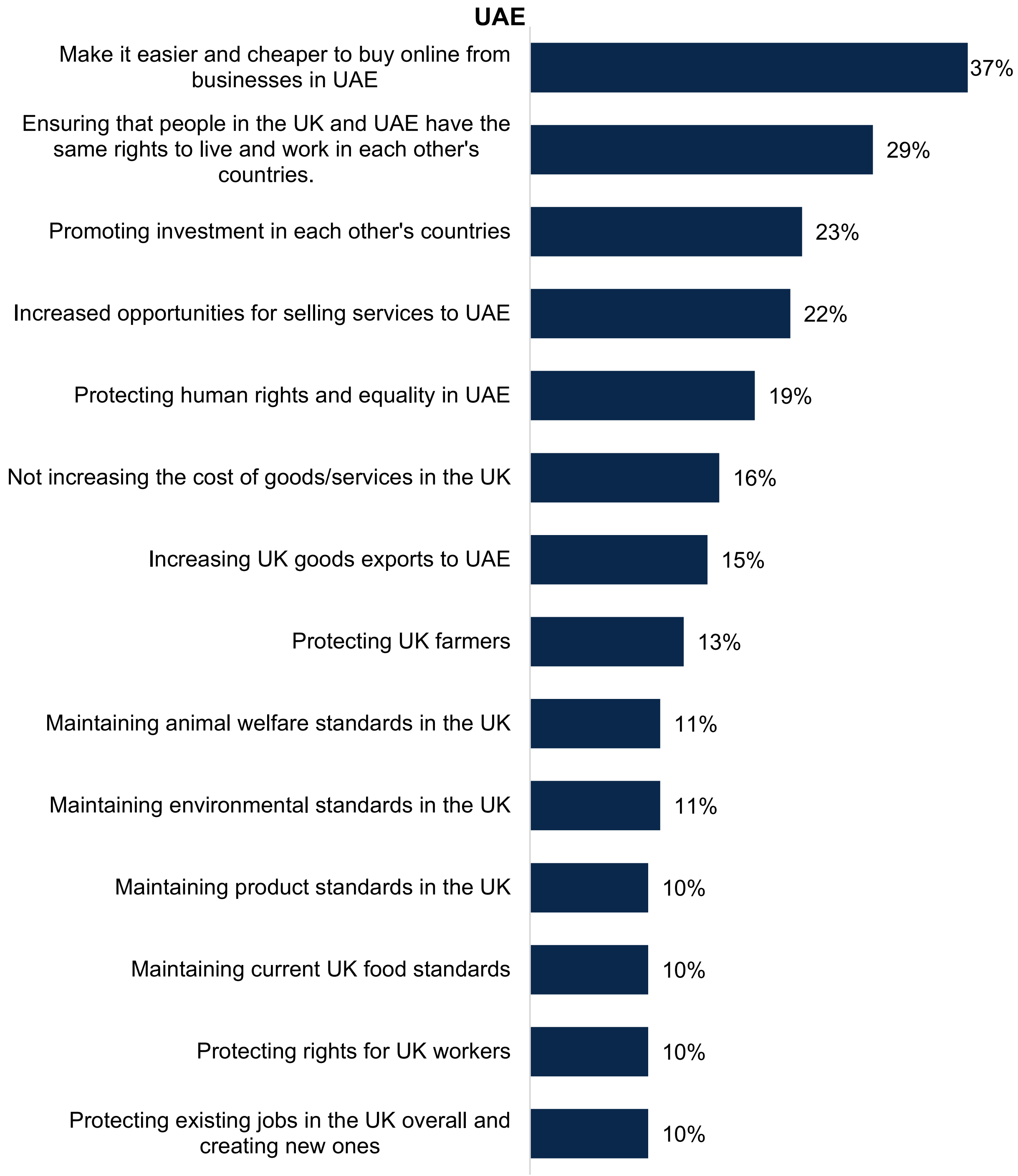
TP2d. Please select up to three considerations you think the UK government should be giving the lowest priority to when negotiating free trade agreements with the following countries? Base: Each respondent was shown 3 countries – base: (1799)

Figure 37: Considerations to be given the lowest priority when negotiating free trade agreements with India



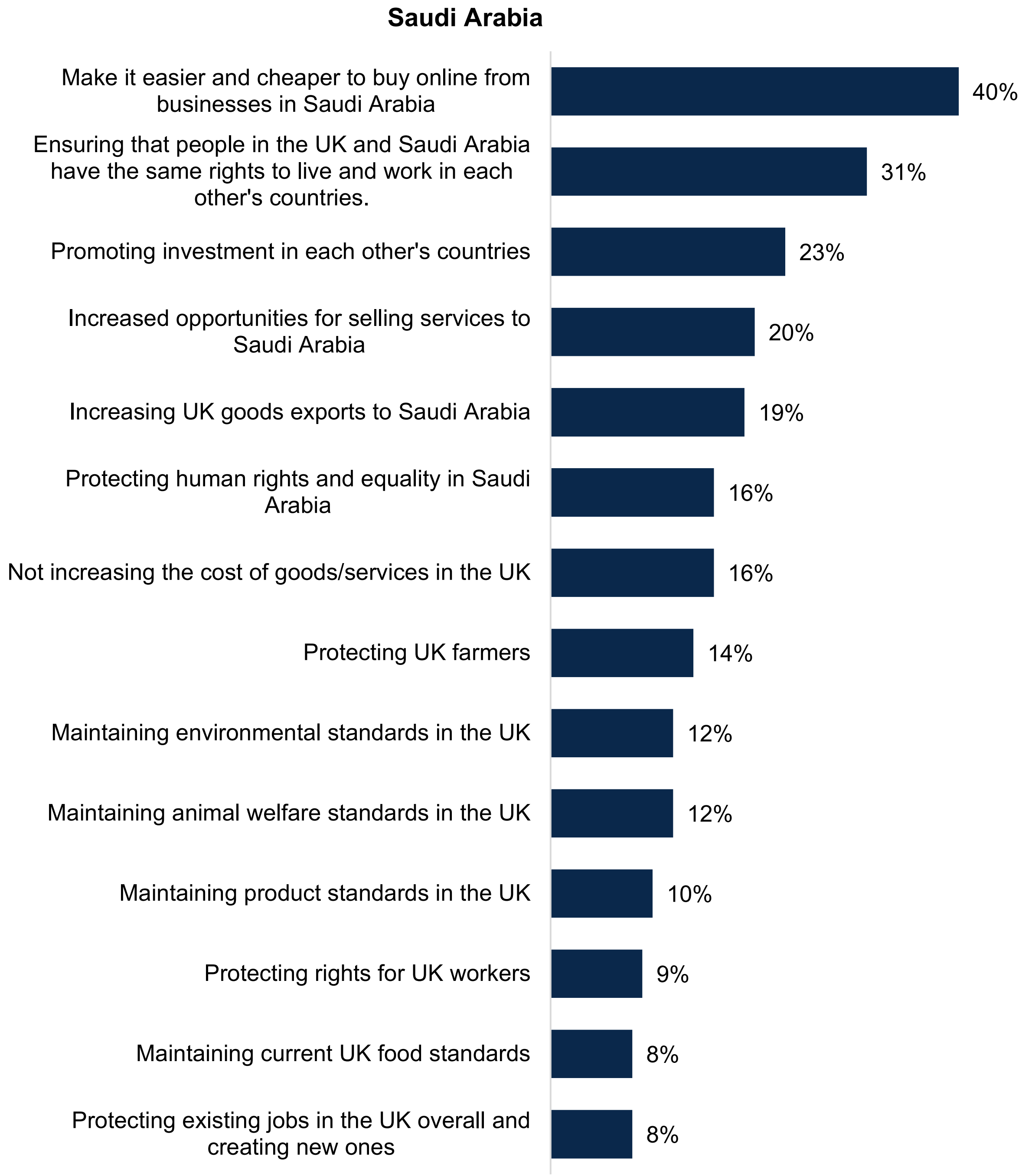
TP2d. Please select up to three considerations you think the UK government should be giving the lowest priority to when negotiating free trade agreements with the following countries? Base: Each respondent was shown 3 countries – base: (1825)

Figure 38: Considerations to be given the lowest priority when negotiating free trade agreements with the UAE



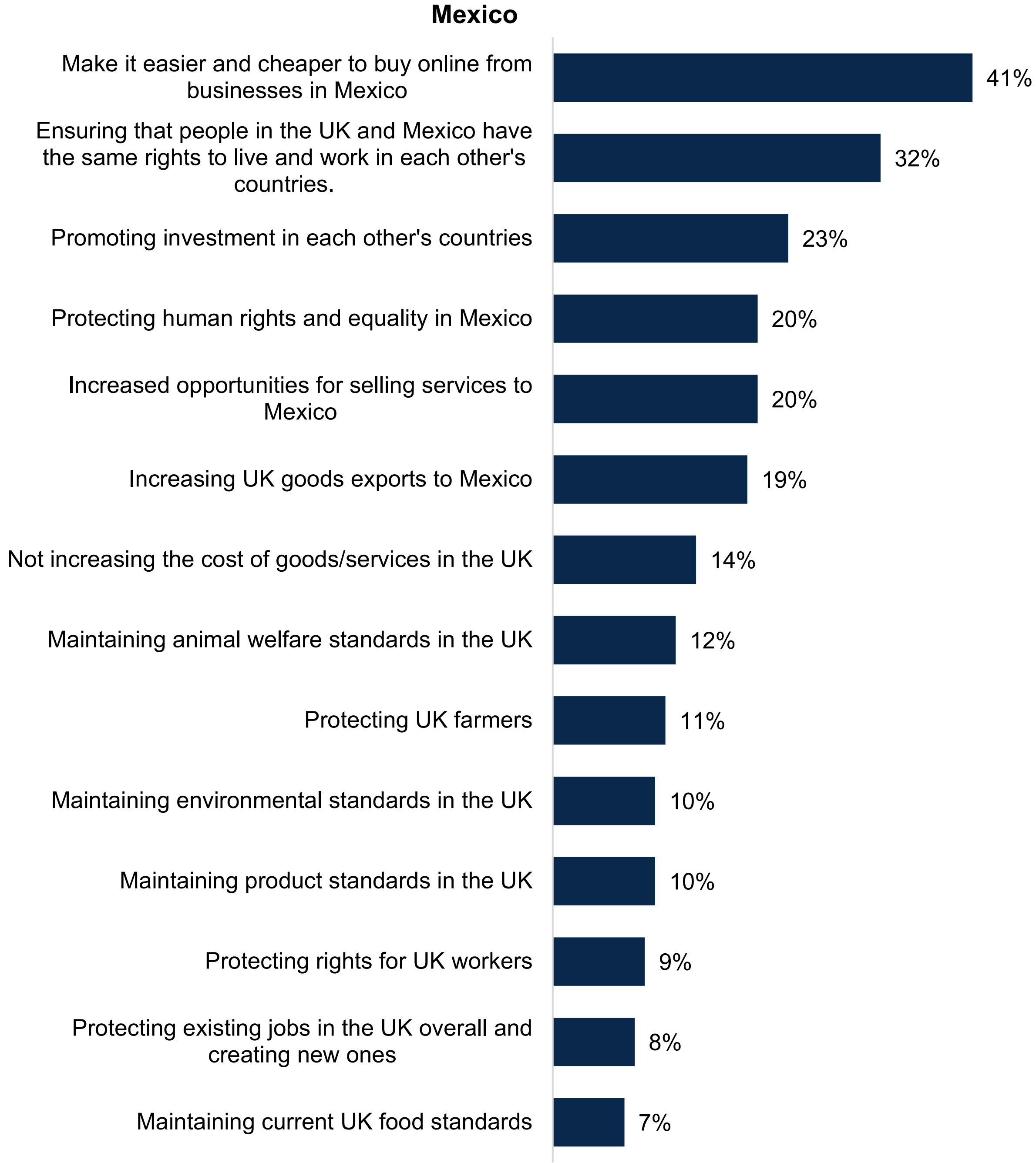
TP2d. Please select up to three considerations you think the UK government should be giving the lowest priority to when negotiating free trade agreements with the following countries? Base: Each respondent was shown 3 countries – base: (1804)

Figure 39: Considerations to be given the lowest priority when negotiating free trade agreements with Saudi Arabia



TP2d. Please select up to three considerations you think the UK government should be giving the lowest priority to when negotiating free trade agreements with the following countries? Base: Each respondent was shown 3 countries – base: (1826)

Figure 40: Considerations to be given the lowest priority when negotiating free trade agreements with Mexico



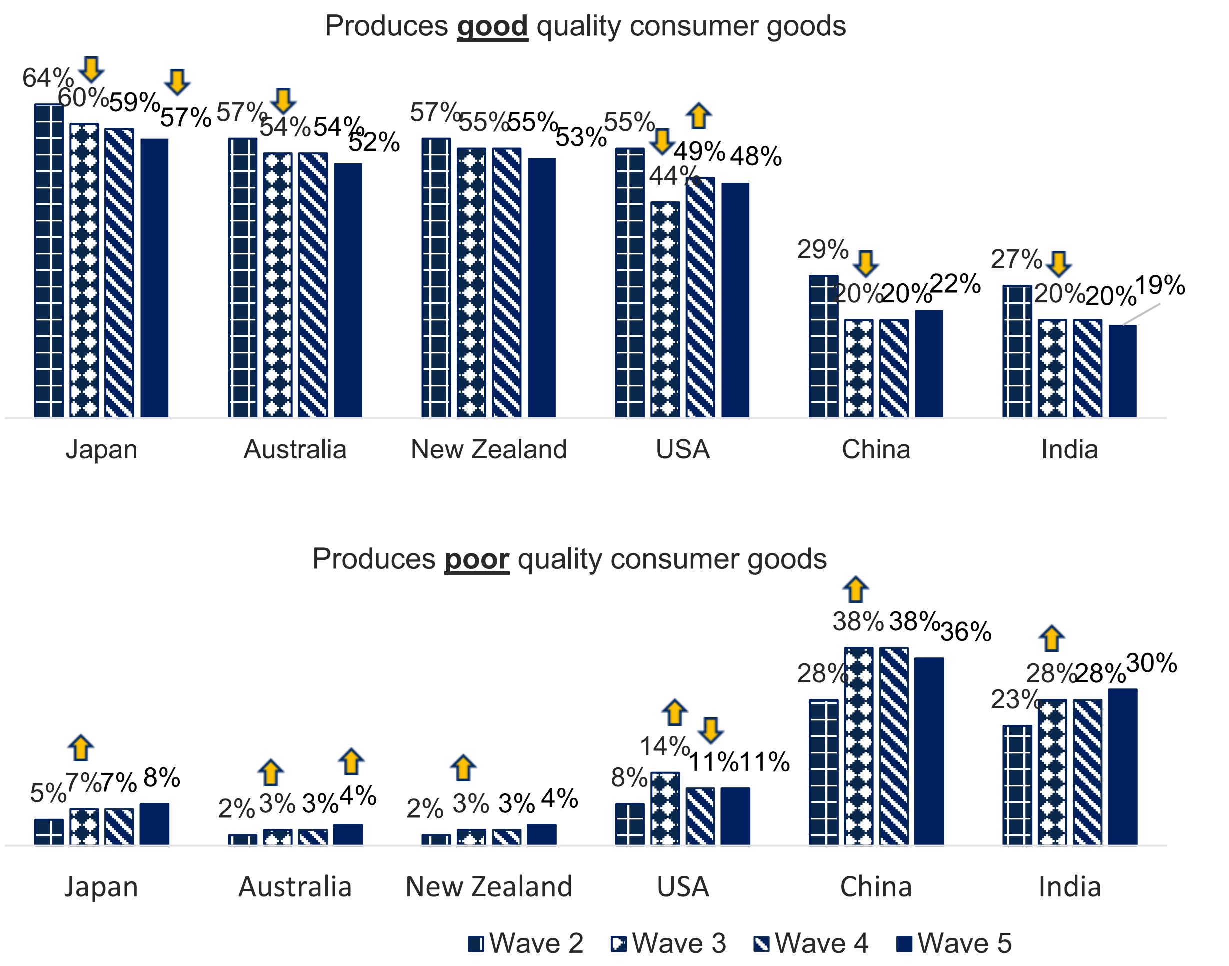
TP2d. Please select up to three considerations you think the UK government should be giving the lowest priority to when negotiating free trade agreements with the following countries? Base: Each respondent was shown 3 countries – base (1745)

6.3.3 Japan is still the country most associated with quality consumer goods, however this perception has dipped slightly this wave. Other countries remain stable.

Figure 41 presents respondents' perceptions of the quality of consumer goods across 6 countries. In line with previous waves, more respondents say Japan produces good quality consumer goods than any other country (57%). However, this proportion has declined compared to wave 4 (59%). Although the overall proportion of respondents saying that Japan produces poor quality goods hasn't increased, the proportion saying that Japan produces very poor quality goods increased significantly by 1 percentage point (2% at wave 4 to 3% at wave 5).

India and China continue to be more associated with producing poor quality consumer goods (30% and 36% respectively)

Figure 41: Perceptions as to the quality of consumer goods by country



CG. Which of the following best describes your view of the quality of consumer goods from the following countries?
Unweighted base sizes: all respondents (Wave 2 = 2349, Wave 3 =3224, Wave 4 = 4009, Wave 5 = 2989).
Statistical significance arrows represent significant differences when compared to results in the wave prior.

7 Appendix

7.1 SEG classification definitions

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

7.2 Regression analysis

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

7.3 Statistical outputs

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

Variable	Relative Importance
Econ. Do you think the general economic conditions of the country will improve, stay the same or get worse over the next 12 months?	56%
Age	12%
IK1. How interested would you say you are in...? How the UK trades with countries in the European Union	8%
IK2. How knowledgeable would you say you currently are about...? How the UK trades with countries in the European Union	5%
Gender	5%
IK1. How interested would you say you are in...? How the UK trades with countries outside the European Union	4%
SEG	4%
Income (Scale £)	4%
Education	3%

8 Statement of terms

8.1 Compliance with International Standards

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

8.2 Interpretation and publication of results

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

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

8.3 Ethical practice

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

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

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

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

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