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British Foreign Policy Group

Free Trade and Protectionism in the Age of Global Britain

Examining the social dynamics
of the UK's future trade policy

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About This Paper

This is the first of a series of papers from the British Foreign Policy Group exploring the social dimensions of the UK's forthcoming national conversation surrounding the launch of its independent trading policy. We begin with a literature review of existing public opinion research, including surveys conducted by the British Foreign Policy Group, and the broader evidence base surrounding social attitudes towards trade, globalisation and open societies. We then move to examine the likely constituencies on the social side of Britain's emerging trade ecosystem and consider how they are likely to defend their interests and cultivate public support. More broadly, we examine what it means to be undertaking this exercise in this particular moment, with our political landscape so heavily influenced by the consequences of what many citizens have perceived to be 'unfettered globalisation'.

This is not an exercise in calculating the value of Free Trade Agreements, nor does it provide economic analysis on the likely trajectory of the UK economy, nor make any judgement on the UK's decision to leave the European Union. Rather, these papers are entirely focused on the social dimensions of the trade conversation, and considering how best the case for an open, connected British trade policy can be made, in an era of rising social and economic insecurity. The British Foreign Policy Group supports free trade as a means of supporting a liberal, prosperous world. We also champion the UK maintaining and improving its agricultural, animal welfare, and environmental standards. And we are fierce advocates for ensuring that public consent is sought and secured towards our international engagement. None of these ambitions and priorities are mutually exclusive, and, we believe, all can and should be reconciled together in the UK's new independent trading policy.

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The Author

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Introduction

An Independent Trading Policy

The vote to leave the European Union in Britain's 2016 Referendum set the nation on a course to reclaim full ownership of its trading policy for the first time in over 40 years. Once Britain finishes the transition period and leaves the Single Market and Customs Union of the European Union, we will hold an economic imperative to strike Free Trade Agreements not only with the EU itself, but also with a host of other countries – including those to which we will lose access as we depart the EU. Extensive economic modelling from both government departments and non-governmental organisations has sought to calculate the value of such Agreements and the impact that leaving the EU will pose towards the government balance sheet in the short, medium and long-term. While the government has presented trading independence as a key area of economic and strategic opportunity for the UK after Brexit, it is clear that it will also present significant challenges, and require a considerable shift in government resources and private sector operations.

Nonetheless, putting the economic costs and benefits of an independent trading policy aside, it is clear that the social dimensions of this forthcoming public and political conversation on trade are considerably less well understood, and largely untested. For those who consider free trade to be an essential tenet of the liberal democratic world order and an area of potential economic opportunity for Britain, there is good reason to be concerned. While public opinion polling has confirmed that Britons are largely supportive of the concept of free trade, when presented with the 'trade-offs' that trade agreements necessarily inspire – including the sporadic hypothetical debates that have emerged around chlorinated chicken and hormone-fed beef – their support can quickly fall away. The public debate around trade will naturally lead to a greater awareness of these and other potentially contentious areas, and therefore an understanding of the social landscape on these issues must form an important aspect of the government's planning.

As the issue of trade rises in salience, there is also considerable potential for activism, protest and even civil unrest to coalesce around public debates. Britain has well-established civil society organisations, unions and activist networks around many of the associated issues – such as agriculture, employment rights, and the environment – and it is reasonable to expect that these constituencies could organise and mobilise to powerful effect. Britain avoided the brunt of the social unrest associated with recent large-scale transnational Free Trade Agreements, such as TTIP, however, an examination of these protest cultures emphasises that they could easily take root in British society.

Movements in support of protectionism may well grow in strength and salience in the next few years as Britain negotiates its post-Brexit trading policy. Whilst free trade is often touted as good for consumers, in the short term at least, protectionism can help to protect jobs and industries in decline, such as the UK shipbuilding and steel industries, increasingly subject to global competition. Conflicting approaches to 'state aid rules' are already a source of tension in the UK's negotiations with the European Union,¹ and the COVID-19 pandemic – compelling governments to intervene in their national economies in unprecedented ways – has further increased the intensity of national debates around the 'propping up' of industries unsustainable in a globalised marketplace.

A central point of tension over the coming years will be how the UK, with some of the highest standards and regulatory frameworks around agriculture, animal welfare and the environment, can ensure these are upheld when negotiating reciprocal market access for goods and services with partner countries who often hold very different regulatory standards. The UK Government

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has made clear it wishes to promote a 'race to the top' and has repeatedly asserted that it will not lower regulatory standards,² however the need to quickly reach multiple Free Trade Agreements may also compel compromises.³

Britain remains in the early stages in its public conversation about trade, and there is much to play for. Brexit is, after all, not only a process of reformulating our trading relationships, but fundamentally reshaping our economic model, our social contract, and the political infrastructure to deliver this. As we move through this transformative period in the nation's history, it will be crucial for the Government to bring the British people along with its mission, and to ensure that the substantive promises that have been made – towards becoming a more confident, prosperous, truly global nation with a sound moral voice – are able to be realised. Despite the new ground being forced, there is little room for error in this project and the stakes could not be higher in the twilight of the age of globalisation. There is every reason to believe the United Kingdom can succeed in its ambitions – the first step will be to listen, and to understand.

Life After the European Union

The EU currently holds free trade agreements with over 70 partners, which account for around 12% of the UK's total trade.⁴ The UK's trading relationship with the EU itself currently accounts for 47% of the UK's total trade.⁵ The UK will continue to be bound by the obligations of the EU's trade agreements during the transition period, which is currently scheduled to expire at the end of 2020. If the UK leaves the transition period without a 'deal' in place with the European Union, the UK will no longer be bound by these trade agreements, and instead will immediately be subject to WTO trading terms. These terms would, in effect, provide a greater degree of friction in the UK's trading relationships, by imposing tariffs for both imports and exports and goods and services.⁶

The activities and rhetoric of the Department for International Trade since the EU Referendum suggest that the UK Government will continue to pursue a global reputation for the UK that prioritises the defence of free trade. As of the time of publication, the UK had already reached the concluding stages of a new trading agreement with Japan, which is expected to increase trade by £15.2 billion,⁷ and is engaged in preliminary trading conversations with several other nations. Nonetheless, the UK Government faces challenges in persuading the British public to maintain and deepen its support for trade, as they become more aware of the compromises it will necessarily compel.

One of the challenges in conducting social research regarding attitudes to trade in the UK and considering how these may affect policy framing, stems from the deep politicisation of trade as part of the negotiations that have been taking place as part of the process of determining the nation's 'future relationship' with the European Union. Britons clearly recognise the imperative to strike a trade deal with the European Union, and the evident economic importance of this is recognised by citizens, who prioritise this relationship as the most important Free Trade Agreement to Britain.⁸ Nonetheless, the emotive intensity of the political debate – and in particular, the hard-line political support that gathered in the summer of 2019 – and has re-emerged at various points in 2020 – for a 'No Deal' Brexit, shows that many Leave voters consider it acceptable to interrupt our trading flows with our largest trading partner as part of our terms of departure from the EU.⁹

Institutionally, there is a strong push to separate discussion of our EU trade negotiations from the discussion of 'non-EU trade', partly to de-politicise the public debate, and also to minimise comparisons between the approaches and allow a more positive, forward-looking and inclusive narrative to develop around the UK's commitment to free trade. When considering the social dimensions of the UK's trade debate, a separation of EU trade from

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the discussion of other future trading relationships feels counterintuitive – not least of all because it is clear that social demographics, identities and issues preferences play a significant role in framing attitudes towards the EU, and also because attitudes towards the EU contribute in turn to shaping citizens' views on the issues at stake non-EU trade. Nonetheless, there are also ways in which excluding the 'triggering' language of the EU relationship from social research on trade helps to contain citizens' views regarding the issues at stake in a manner more conducive to examination.

The coronavirus pandemic, which arrived in full force just weeks after the 'Brexit Day' deadline of 31st January 2020, has reinforced the energies of campaigners on all sides of the free trade debate. With the nation suffering its greatest economic downturn in modern history,¹⁰ some voices had been calling for an extension to the Brexit transition period in order to 'steady the ship' and reduce uncertainty, while others argued the pandemic provides an opportunity for a full reset of our economic model, and caution against any further delays. The Government officially removed the opportunity for an extension on the 12th of June 2020, in a representation from Cabinet Office Minister Michael Gove to the European Commission's Vice-President, committing the UK to either securing a deal or leaving without one.¹¹

The UK is now accelerating quickly towards a new future in which its trading relationship with the European Union is simply seen as one agreement within a balanced portfolio, stretching across the globe. Whilst thus far, the evidence does not suggest that even a large suite of other agreements could meet the same degree of trading significance as the UK has held with the European Union,¹² it is patently clear that this 'rebalancing' of the UK's trading relationships is not simply driven by economic pragmatism. There is a much deeper project at stake here, one intended to reinforce the nation's sovereignty through a proactive effort towards the diversification of its economic model and its global relationships. In many ways, this embeds the UK's trading strategy more heavily within its foreign policy – forging links between trade, investment, diplomacy and development – and also to domestic projects, such as the 'Levelling Up' agenda, by which trade connectivity can be offset against investments in the UK's manufacturing capabilities.

This three-way reframing of trade as a means of projecting power and influence, and positioning global relationships – outside the EU – as a means of building national resilience, whilst simultaneously demonstrating sensitivity to citizens' insecurities towards globalisation, will move the UK into a relatively untested position amongst its peers. It will also necessitate a sophisticated communications strategy, to ensure the right balance is struck between these narratives – each, in their own way, delicate and vulnerable to competition. To achieve this, the Government will need to develop a forensic understanding of public opinion – a task made especially challenging because of the relatively low degree of established knowledge about trade, and the deep level of entanglement in attitudes towards trade with broader instincts towards globalisation, international connectivity and the longer-term impacts of de-industrialisation.

In this paper, we will explore the current canon of evidence regarding attitudes towards trade, as well as the relationship between public opinion on trade and other related issues, such as globalisation. In future papers, we will contextualise these attitudes within the broader picture of the evolving 'mood music' on globalisation, which has been shifting dramatically since the 2008 financial crisis and the rise of anti-establishment movements, and also the 'twilight of the free trade era' and the collapse of the TTIP negotiations. We will also examine the key issues of social debate in the UK's forthcoming trade negotiations and consider how these issues are likely to be championed by industry and third-sector organisations.

British Public Opinion on Free Trade

A Rapid Review of Public Opinion on Globalisation and Free Trade

British attitudes towards trade are influenced by broader perspectives on globalisation – in particular, whether an individual's instincts favour a greater degree of international connectivity – in terms of goods, services, capital and people – or whether this is regarded as a threat to national, regional or community-level interests. Previous academic and institutional survey research provides a deeper understanding of the issues at play in the shaping of citizens' mindsets, and wider political context consequential in the activation and influence of public opinion.

Britons are broadly supportive of globalisation as a concept, with 56% of Britons regarding globalisation in a positive light, fractionally higher than the EU average.¹³ Furthermore, 46% of Britons believe globalisation is a force for good in the world, compared to just 19% who think it is a force for bad. There is also a general positivity about importing of goods and services, with 70% of Britons comfortable with importing goods from other countries – although this degree of support may have been challenged during the pandemic. However, there is a clear discontent with how the benefits of globalisation are distributed, with 55% of Britons believing that globalisation has benefitted the wealthy rather than ordinary citizens, and only 32% believing that immigration – an important component of globalisation – has had a positive impact on the UK.¹⁴

Attitudes towards globalisation are shaped by a combination of personal circumstances, individual outlooks, and external events. It has been well evidenced that the global financial crisis played a key role in guiding British public opinion on globalisation, as it did in influencing attitudes, to varying degrees, across the EU. The proportion of the EU population regarding trade as an opportunity for economic growth fell four percentage points between 2008 and 2013, with the largest declines in support for globalisation visible in the member states most affected by the financial crisis.¹⁵

Nonetheless, despite the dramatic events around the global financial crisis, there has been a longer-term trend over recent decades, across the EU as a whole, towards more positive attitudes towards globalisation. Hence, by 2017, the proportion of European citizens who consider globalisation to be a positive phenomenon had increased by 17% more than in 2005. There are, however, many demographic variations in opinions, with older Europeans and those without qualifications significantly less likely to have positive perceptions of globalisation compared to their younger and university-educated counterparts.¹⁶

With the exception of Greece and Cyprus, support for international trade has also concurrently risen over the past decade in all EU states, with six in ten Europeans now believing they benefit from international trade – with wider choice for consumers the most frequently cited benefit. In line with perceptions on globalisation however, older Europeans and those with lower levels of education are substantially less likely to think they benefit from free trade.¹⁷ The question of the influence wielded by free trade and globalisation on social inequalities stands out as an issue of primary concern for both Britons (53%) and the wider EU community (63%). Men, manual workers and those with lower levels of education are more likely than other citizens to believe that globalisation increases social inequalities.¹⁸

Attitudes towards globalisation and free trade are heavily shaped by both lived experience and more latent forces shaping citizens' world views. A number of scholars have investigated the formation of public opinion regarding globalisation, to examine the personal and environmental characteristics that play a role in the formation of individual perspectives. A 2018 study

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surveyed and ranked Britons according to five indicators of nationalism and globalism, where the globalist mindset is described as one “supportive of open markets, tolerant of immigration, enthusiastic about redistribution and income inequality and one happy to reduce national power through a preference for international consensus in foreign policy decision-making”. They placed the majority of the British electorate into a ‘moderate’ category, although more than double the percentage of Britons fell into a ‘nationalist’ category than possessed a ‘globalist’ profile in their five-indicator model.¹⁹

Their research found that older Britons are considerably more likely to be ‘nationalist’ than younger Britons (37% to 17%). Working-class voters were found to be the least likely to have a ‘globalist’ orientation (8%) and the most likely to hold a strong ‘nationalist’ profile (34%). Strong regional differences in attitudes could also be observed – for example, Scotland is home to more ‘globalists’ (15%) than other regions of the UK, whilst the East of England, North-East, and Yorkshire and the Humber have the highest proportion of ‘nationalist’ residents (at 36%, 34% and 33% respectively).

There has been a tendency in academia and in national politics to focus on the relationship between individual circumstances within the labour market, and how they may shape citizens’ opinions towards globalisation. A 2001 study found that highly skilled workers, who benefit more from economic integration in global markets, as cheap imports pose less of a direct threat to their employment, are more likely to support both free trade and immigration.²⁰ However, individual exposure to the negative consequences of trade and globalisation does not appear to be a sufficient determinant of the degree to which these issues have proven to become politically salient. In 2015, researchers found that regardless of their individual differences in skills and employment, Europeans were concerned about the impact of globalisation on their nations’ social, political and economic welfare, and that perceptions of their nation’s direction on these issues was a stronger determinant of opinion of globalisation than their own personal circumstances.²¹

These findings built on the results of a 2009 study, which found that self-interest has little impact on opinions on trade, in part, due to difficulties in understanding the nature of the link between personal economic wellbeing and government policy. Rather, the authors argued, individuals are much more concerned about the wider economic impact of trade, and trade preferences are therefore greatly shaped by perceptions of the impact on the economy – perceptions in turn influenced by both the reality of economic conditions and by the image of economic conditions presented by the media.²² As such, citizens in countries experiencing a degree of economic stability or prosperity tend to find themselves more supportive of trade.²³ As such, perceptions of economic security, not only on an individual level, but on a national level as well, appear to play an important role in the formation of public opinion.

Community identities also support the construction of perceptions of trade. A 2017 study suggested that, when given the choice, citizens tend to support trade policies which benefit their ‘in-group’ rather than those that maximise total gains across the nation as a whole. The extent to which this is the case is mediated by political preferences, with individuals favouring their national in-group to a greater extent if they are also more likely to hold an ‘exceptionalism’ attitude and regard their nation to be ‘superior’ and ‘more deserving’ than other countries.²⁴

A study examining Australian public opinion on the ChAFTA agreement also found that cultural familiarity with the negotiating country improves support for trade, suggesting that countries with higher levels of cultural diversity may prove more amenable to trade with non-pluralistic counterparts, and/or that diaspora populations may be crucial in harnessing support for FTAs.²⁵ Hence, it is important to explore public attitudes towards globalisation in the context of the degree to which these are embedded within a more comprehensive framework of social and economic attitudes, political, ethno-centric and community-based identities, and perceptions of the nation.

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Attitudes towards globalisation and free trade have been explored as proxies for broader 'world views'. A 2009 study found that an 'activist' foreign policy attitude, a positive regard toward 'out-groups', and a preference for trade liberalisation, were all directly correlated, reflecting a 'world view' supportive of cosmopolitanism and inclusion. This argument was advanced in a 2012 study, which contested that individuals view the material effects of trade liberalisation as part of a broader package of openness, finding a strong empirical relationship between people's views about social-cultural aspects of openness and their views about the impact of international trade.²⁶ An individual's psychological 'world view' is therefore found to have a significant bearing on trade preferences.²⁷

These studies supported earlier research conducted prior to the financial crisis, which found that citizens' concerns about the free market, consumerism and modern life influenced their opinions towards both economic and cultural globalisation.²⁸ A 2005 survey-based study found that communitarian-patriotic values were directly correlated to increased support for protectionist attitudes, but that the effects were also moderated by beliefs that the broader institutions of society are working well.²⁹ Significantly, self-interest and values do not appear to be mutually exclusive in the construction of public opinion on trade; rather, research suggests that economic self-interest is a second-order consideration, which acquires salience only when symbolic, non-material preferences, such as nationalism and ethnocentrism, are weak.³⁰

Citizen-focused research specifically exploring attitudes to trade continues to be complicated by the relatively low salience and understanding of the complex issues involved in trade policy. Research finds that the lack of readily available and accessible information about trade policy increases the salience of social and cultural beliefs, such as nationalism, in affecting opinions on trade.³¹ Deliberative exercises have tended to reveal that, when citizens are exposed to a greater degree of information about trade, they are more likely both to express self-serving policy preferences and be more sensitive to the interests of others – although 'selfish' responses tend to outweigh altruistic ones.³²

As with many policy areas, there are specific challenges in building public consent around policies with asymmetrical benefits, with citizens most likely to be protected from the negative consequences of free trade, and the most economically secure in general, the most inclined to be positive towards it.³³

BFPG Public Opinion Research

To better understand the landscape of public opinion in the UK regarding foreign policy and international engagement, the British Foreign Policy Group has been conducting extensive qualitative and quantitative research. These research projects seek to address some of the most substantial gaps in existing evidence, and to contextualise this research within the current political environment and its influencing narratives.

Our 2020 annual public opinion surveys were conducted in January and February, seeking to accommodate any potential ebbs and flows pertaining to the significance of Britain's departure from the European Union and the commencement of the transition period, on the 31st of January. We subsequently undertook sections of these surveys again in April and May 2020, to monitor any preliminary shifts resulting from the seismic effects of the coronavirus pandemic. One area of special volatility pertained to questions that invited Britons to identify their primary international issues of concern – and it appears that the specific issue of trade has been exposed to some fluctuations over both of these periods.

Between 2019 and 2020, the proportion of citizens who identified trade as a significant issue of importance to them fell by three percentage points (21% to 18%); however, between January and February 2020 alone, this fall was corrected – reflecting the sense that the commencement of the transition period from the European Union necessarily opened the door to a new beginning for the United Kingdom, one in which trade would play a more central

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role. In our surveys in April and May, however, with the pandemic dominating public attention, the proportion of citizens interested in trade as an issue of importance had fallen to 13%. We can, however, anticipate that this figure is likely to rebound further over the coming months and years, especially as the UK Government moves full steam ahead with trade negotiations, and if the trade debate comes to agitate the polarisation that had formed around the Brexit conversation in recent years.

The BFPG's annual survey in 2020 also allowed Britons to emphasise the specific issues of greatest concern for them related to trade, as the UK embarks upon its first wave of free trade negotiations. Respondents were given the opportunity to select up to three concerns. What is clear from the results, is that there is no single issue of dominant preoccupation for citizens, with concerns spread widely and thinly across a vast array of issues. That said, just 12% of Britons said they had 'no concerns'. From this, we can deduce that trade is increasingly becoming an issue capable of capturing citizens' attention and that it is also the subject of some burgeoning anxiety – yet the consternation it can inspire at this stage is rather diffuse, and could therefore be prone to a significant degree of volatility over the coming months and years.

Overall, the most frequently cited concern in our survey was around the protection of standards of health services (29%), reflecting the extensive public debate during the 2019 General Election campaign around whether the NHS would be 'on the table' in trade negotiations, particularly with the United States. This was followed closely by concerns around upholding workers' rights (26%), protecting standards of food and beverages (26%), environmental protections (22%) and animal welfare (19%). Concerns about job security, loss of revenue for small firms, and wage competition were relatively weak, only attracting the interest of around 10% of the population – suggesting that individual consumer preferences and values are currently stronger motivators for the British electorate on this issue, than some of the more traditional economic factors associated with protectionism.

When viewed together, we can observe that issues pertaining to agricultural production will play an especially central role in the public debate around trade, with food standards, the environment, and animal welfare areas of particular concern. The UK Government appears to have recognised this, identifying 'farmers' as a separate interest group outside of 'industry' in the announcement of the formation of its Trade Advisory Board.³⁴

This debate has played out publicly in the Agriculture Bill, which outlines the UK Government's plan for supporting and regulating the farming industry after Brexit. Despite repeated commitments by the UK Government that food standards would be protected in any future trade deal,³⁵ campaigners remain concerned that without a legally binding commitment, food standards will fall. A petition by the National Farmers' Union calling for the "UK Government to put into law rules that prevent food being imported to the UK which is produced in ways that would be illegal here" received over one million signatures.³⁶ The #SaveOurStandards campaign, backed by a number of high profile celebrities and charities, including Jamie Oliver and the RSPCA, penned an open letter calling for the UK "not (to) trade away our children's futures" and to include commitments to food standards in the bill.³⁷

In September, the House of Lords passed two amendments to the Agriculture Bill, in support of the NFU and Jamie Oliver's campaigns. The first would require all agricultural and food imports to meet domestic production standards, and the second would give the new Trade and Agriculture Commission the power to scrutinise all future trade deals. Despite a rebellion amongst a number of Conservative MPs, the amendments were defeated in the House of Commons in October, with the UK Government arguing that the amendments are unnecessary as the government has already pledged that food standards will be maintained in any post-Brexit trade agreements.³⁸ Nonetheless, the degree to which the Bill dominated political debate demonstrated the strength of the coalitions beginning to mobilise around the UK's early trade policy discussions, and its potency amongst many varied stakeholders both inside and outside of Westminster.

Demographic Disparities in UK Trade Attitudes

Despite Britain's trade policy having been coordinated within the European Union over recent decades, a relatively substantial canon of British public opinion polling exists regarding the issue of free trade. The Department for International Trade's own research, for example, finds that Britons are largely supportive of the concept of free trade, with 66% favourable towards Free Trade Agreements, and only 4% actively opposed.³⁹ These findings have been replicated across a range of other recent surveys focusing on the issue of trade in general, and also the support for more specific Free Trade Agreements with particular countries.⁴⁰

Looking more closely at the demographic break-downs concealed beneath the apparently substantial levels of support for free trade in Britain, however, some concerning distinctions emerge, which will have a bearing on the manner that future public debate will manifest.

The first prominent finding is that women are considerably less supportive of Free Trade Agreements than men – more as a result of their higher levels of ambivalence towards them than active antipathy, but also due to their increased likelihood to be unsure regarding the benefits of such Agreements.⁴¹ When presented with a broad range of international issues of concern, men are twice as likely (24% to 12%) than women to identify trade as a primary concern. An argument could be made that this sense of disengagement and caution is propagated by the fact that the gendered division of labour means women can find themselves more vulnerable to the adverse potential impacts of free trade than men, both as individual workers and consumers.⁴²

For example, as workers, trade liberalisation can precipitate lower wages of those in manufacturing sectors and agriculture, including the export sectors of garment and textile manufacturing – where women are disproportionately employed. Women also represent a larger percentage of fragile and temporary workforces, such as the 'low-skilled' service sectors, health and social care, where hard-won employment standards and protections are especially important.⁴³ The coronavirus pandemic has shone further light on to women's vulnerability to trade disruption. Aside from their aforementioned over-representation in the textile and manufacturing sectors exposed to trade disruption during the pandemic, women also comprise a large section of the workforce in tourism and business travel services which have been greatly affected by travel restrictions.⁴⁴

Women may therefore be more inclined to sense that these could become vulnerable to negotiation during the Free Trade Agreement process. Furthermore, as consumers, trade deals that open up public services to privatisation and competition tend to hit women the hardest, as they generally fill the gaps where public services are no longer affordable or efficient, adding to women's domestic labour and care responsibilities while reducing their access to education, community services and healthcare.⁴⁵ This is compounded by the fact cuts to tariff and non-tariff barriers often lead to reduced government revenues and cuts to public provision of social services which, as traditional care givers, disproportionately affects women.⁴⁶

Significant disparities of public opinion can also be observed between Social Economic Grade (SEG) classifications,⁴⁷ with those in the higher classes more than 20 percentage points more likely to support Free Trade Agreements than those in semi- or unskilled work, or the unemployed. Similarly, 75% of those with further education support Free Trade Agreements, compared to 55% of those without qualifications.⁴⁸ Britons from lower social grades and without further education are also more instinctively protectionist, with 52% of them agreeing that Britain should limit the import of foreign products to protect its national economy, compared with 23% of those with a degree-level qualification or above.⁴⁹

The distinctions in attitudes between socio-economic grades also extend to the degree to which their perceptions of the economic objectives of trade deals are grounded in the national or local spheres. Those in higher socio-economic grades are more likely to place

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their emphasis in British trading objectives on strengthening the national economy – with more than half (53%) of Brits in AB social classes placing this in their top three priorities, compared to just 40% of those in grades C1C2 and 35% of those in grades DE. In turn, those in lower socio-economic grades are more likely to prioritise more localised considerations, such as protecting existing jobs in their local areas.

In the BFPG's survey research, however, we also see that the values components of free trade negotiations are more likely to be championed by those with further education and from higher socio-economic groups. For example, university graduates are more inclined to say they are concerned about workers' rights than school leavers (33%, to 22%), as are those in the ABC1 social grade compared to those in the C2DE grouping (28%, to 24%) – who would be more likely to be employed in insecure work vulnerable to any lowering of such standards. Graduates are also more concerned about environmental protections than school leavers (29% to 17%), although school leavers are somewhat more concerned about animal welfare (21% to 16%) – an important component of the UK's public debate on trade.

Another interesting demographic trend is that the support for free trade in Britain is disproportionately driven by younger voters, with less than half of under-35s (43%) concerned about the impact that global businesses have on local economies, compared to over 60% of those aged over 55 years.⁵⁰ There is a logical component of self-interest here, with older workers more likely to have been employed in the kinds of positions historically vulnerable to globalisation, and younger workers more adaptable and skilled to work in a digital, transnational age.⁵¹

Generational differences in opinions on trade also extend to perceptions of issues of significance. In general, older Britons in the BFPG's surveys express a higher degree of concern around health services (37% of 55-and-overs to 22% of under-35s), food and beverage standards (32% to 18%), agricultural standards (22% to 10%), animal welfare (21% to 15%), as well as impacts on wage competition and small firms. In turn, younger Britons appear more concerned about environmental protections (26% to 20%), and the degradation of natural resources (15% to 10%).

Concerns about trade are also not evenly distributed across UK nations and regions. Britons in the East Midlands (29%), the North East (25%), Wales (25%) and London (24%), are the most concerned about international trade, while the South West (49%), Northern Ireland (45%), Wales (43%) and the South East (42%) are the most likely to support Britain as a 'champion of free trade'. Breaking down the concerns about free trade, whilst concern about health services and the NHS are relatively consistent across regions, the BFPG's surveys found greater disparities on other major concerns.

Scotland (36%) and the West Midlands (30%) are the most concerned about protecting workers' rights. Residents in the North East (35%) and Wales (33%) are the most concerned about standards of food and beverages. The South West (25%), Northern Ireland (24%) and the East Midlands (23%) are most concerned about agricultural standards. Londoners are uniquely concerned with the degradation of natural resources (21%) whilst the North East (17%) and Northern Ireland (17%) are uniquely concerned with job outsourcing.

The degree and nature of concerns about free trade negotiations also differ significantly between the UK's main political parties, reflecting the politicisation of the trade conversation in the broader 'post-Brexit' environment. Almost a fifth of Conservative voters (19%) claim they have no concerns whatsoever about trade negotiations, while just 5% of Labour, Liberal Democrat and Green voters share the same view.

Overall, Labour voters are more concerned about every aspect of trade negotiations than Conservative voters. The disparity in the level of anxieties is most prominent in relation to health services (39% to 27%), protecting workers' rights (39% to 18%), standards of food and beverages (33% to 24%) and environmental protections (33% to 15%). That said, it is clear that

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around a fifth-to-a-quarter of Conservative voters do possess a level of concern about these issues. We cannot presume to know whether Conservative voters' relatively muted concerns about these issues more reflects their de-prioritisation of these issues compared to Labour voters, or whether the stewardship of the negotiations in the hand of their political party imbues a degree of trust that neutralises their concerns.

There are, however, a few notable exceptions in the party divide on trade negotiation anxieties. Conservative voters are more likely to be worried about free trade negotiations threatening agricultural standards (19% to 13%), the crowding out of domestic producers (12% to 7%), the loss of revenue for small firms (13% to 10%), and theft of intellectual property (9% to 5%). They share relatively equal concerns with their Labour counterparts regarding animal welfare.

The higher degree of concern towards almost every major aspect of trade negotiations amongst Labour voters is also replicated amongst Remain voters, meaning that Labour-Remain voters often possess an outsized level of concern about these issues, utterly distinct both from their Leave-voting counterparts in Labour, and all Conservative voters. One exception is agricultural standards, which Labour-Leave voters are uniquely disinterested in, and the degradation of natural resources, which unites both Conservative and Labour-Remain voters in concern.

Given the low individual knowledge about trade amongst citizens, it is important to also consider the media environment in which they will be receiving information about this subject. We know, for example, that those Britons who read the Daily Telegraph (48%) are significantly more likely to be concerned about trade than readers of The Sun (16%) and the Daily Mirror (15%). It is reasonable to expect, however, that citizens will become more familiar with issues pertaining to trade over the coming years, and the media will concurrently play a larger role in communicating and challenging narratives around these. We can therefore anticipate that citizens' preferences and the salience of trade will be heavily mediated by politics and journalism in the short and medium term.

These statistics emphasise that many demographic, socio-economic and regional distinctions will shape the participation, voice and positions of citizens within the conversation about free trade. We are also reminded of the complexity of the public debates around these issues, when perceptions of personal vulnerability do not always align with the tendency to advocate for values-based positions on the issues of trade. In short, more educated and socio-economically secure citizens, less vulnerable to the negative consequences of Free Trade Agreements or globalisation in general, may embody some of the strongest voices in the political conversation.

Finally, it is important to note that 30% of the population are either ambivalent or unsure about the merits of Free Trade Agreements, rather than overtly opposed.⁵² In our BFPG surveys, we find that young Britons are almost twice as likely to be unsure of their positions on issues of trade compared to older Britons. We can consider this group the 'persuadables', most open to potential influence both in terms of supporting or opposing free trade in Britain's forthcoming public conversation. Government communication strategies seeking to encourage support for free trade agreements will therefore need to be targeted and sensitive to the different needs and motivations of social groups, and there is a particular urgency around beginning to 'make the case', as citizens' relatively weak views on the subject mean they are capable of being shaped by compelling narratives from both inside and outside of government.

Free Trade and Values

Since the 2016 Referendum, the UK Government, under the leadership of both Theresa May and Boris Johnson, has sought to emphasise values in its approach to trade policy. It has, for example, provided £7 million to the 'SheTrades' initiative, which promotes women's economic empowerment through enabling increased participation of women-owned businesses in trade.⁵³ This pledge reflects the recommendations of the International Trade Select Committee's report on 'Trade and the Commonwealth', which argued for UK trade policy to actively promote gender equality, by ensuring that women can "move up the value chain" and that trade liberalisation does not undermine labour rights. The report also claimed that trade policy will be a key tool through which the UK could work towards achieving the Sustainable Development Goals.⁵⁴

The Secretary of State for International Trade, Liz Truss, has spoken frequently about the government's wish to pursue trade deals with 'like-minded' partners. Visiting Australia, New Zealand, and Japan in September 2019, Truss said she wanted to send a clear message: "the UK is an open, welcoming business destination and we are ready to trade".⁵⁵ The Government's stated ambition to prioritise trading partners who share British values has translated into its choice to pursue trade with culturally similar, Anglophile nations like Canada, the US, Australia and New Zealand, as well as long-standing security partner Japan. Speaking on the UK-Australian relationship, Truss said the countries were "old friends, with new opportunities", emphasising the historical links between the two.⁵⁶

Values-based trade deals have long been a cornerstone of the EU's approach, with the bloc now requiring legally binding commitments on the environment and human rights as part of all comprehensive EU trade agreements. Furthermore, the EU has begun to introduce accountability mechanisms to ensure these values-based commitments are met including regularly auditing to ensure compliance with sustainability provisions in trade agreements. It also organises large numbers of public stakeholder events on trade to ensure trade deals remain aligned with the values and interests of the EU.⁵⁷ The EU and the UK have both asserted that any free trade agreement between the two should ensure the maintenance of both sides' values and interests,⁵⁸ and the UK has sought to emphasise that it will endeavour to exceed the standards set by the EU in the pursuit of its independent agreements.⁵⁹

The UK's agreement with Japan provides an indication of the Government's approach moving forward with non-EU negotiating partners. The deal itself will carry over many of the same elements of the standing EU agreement, as well as securing a number of additional benefits beyond those the UK would receive through the existing EU-Japan deal. These include improved data and digital provisions to enable the free and secure flow of data between the two nations, increased market access for UK financial services, including exploring how to reduce regulatory friction and greater recognition of the UK's geographical indicators. The deal has been praised for its comprehensive inclusion of provisions for small and medium-sized enterprises and the digital sector, and more broadly for the increased certainty it delivers to the UK about its prospects in its new independent trading era. The agreement also brings the UK a step closer towards joining the Comprehensive and Progressive Agreement for the Trans-Pacific Partnership (CPTPP)⁶⁰ – which the Government hopes will increase Britain's voice and economic reach in the Asia Pacific region.

It is self-evident that the UK will undoubtedly face larger difficulties in trying to pursue a values-based trading policy in agreements with many nations, including those which hold the greatest clout in the global economy. For example, a trade agreement with China, which accounted for 4% of UK exports and 7% of UK imports in 2019,⁶¹ would be of significant potential economic benefit to the UK, but would have to be negotiated around growing concerns about human rights abuses in Xinjiang, its incursions in Hong Kong, and other areas of security risks that

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the Chinese state and its subsidiary operations pose to various parts of the UK's economy and its democratic infrastructure.⁶² Foreign Secretary Dominic Raab has already committed that the UK will not allow a potential UK-China Free Trade Agreement to compromise the UK's willingness to confront China over Hong Kong,⁶³ and it is assumed that this would also extend to other areas of the UK's global values mission.

Turkey also provides another example of the influence and constraints placed upon trade negotiations by evolving geopolitical relations. Turkey is a close security ally of the UK, and a member of NATO. The UK and Turkey have a strong existing trade relationship engaging in £18 billion worth of trade last year⁶⁴ and the two countries have stated that they are "very close" to a trade deal. However, Turkey's growing aggression and belligerence in its neighbourhood complicates this process – as it will force the United Kingdom to choose between alignment with the European Union or an individual approach.

The European Union has refused to negotiate changes and greater liberalisation to the existing EU-Turkey trade relationship due to Turkish aggression in the Eastern Mediterranean. Tensions in the region have worsened in recent months, after Turkey announced plans to search for oil and gas in waters awarded to Greece under the UN Law of the Sea. This has also led to questions about whether Turkey should be allowed to retain its membership of NATO.⁶⁵ Turkey and the EU have also clashed over Turkey's involvement in Libya, including the deployment of Turkish troops, contrary to the EU's calls for de-escalation and ceasefire,⁶⁶ and Turkey's provocative decision to allow thousands of migrants to storm the Greek border early in 2020.⁶⁷ The EU is divided over how to respond to Turkey's escalating and uncooperative behaviour, and the issue is advancing internal tensions on foreign policy.⁶⁸

Another prominent example of the complexities of negotiating with allies is of course found in the ongoing discussions taking place around a UK-US free trade agreement. The contested nature of the public debate around the prospect of this agreement, which was pitched as a flagship outcome of Britain's departure of the European Union,⁶⁹ has placed pressure on the Government to ensure that the UK's trading policy adequately emphasises the 'safeguarding' of standards as a fundamental principle.⁷⁰ The fact that even negotiations with the UK's closest security partner presents special challenges in terms of the vastly distinct approaches between the nations in terms of food standards, agriculture, animal welfare, environmental protections, drug pricing, employment protections and workers' rights, fosters potential vulnerabilities in the securitising narrative around free trade.⁷¹

Australia's experiences in negotiating agreements with some of its regional trading partners in the Asia Pacific emphasise the limitations of such negotiations in terms of the practical advancement of standards and influence on values. For example, Australia's free trade agreement with Malaysia was criticised for failing to include stipulations around labour standards and the environment, containing no commitment that states would not lower standards to gain a competitive edge in trade. The Australian Government asserted that the inclusion of discussions about environmental and labour standards in 'side-letters' to the agreement was adequate and a step up compared to Malaysia's other trade agreements, which make no reference to labour provisions at all. Despite this, the Australian Government's Joint Standing Committee on Treaties reaffirmed that the standards should be included in the principal FTA in all trade agreements.⁷²

Furthermore, in several free trade agreements, including with Korea, Australia was forced to include an Investor State Dispute Settlement (ISDS) clause, despite concerns that such clauses would promote "regulatory chill" in Australia with the government less inclined to regulate in the public interest on issues such as health policy and environmental standards for fear of being sued by foreign firms.⁷³

British public opinion makes clear that values will need to be embedded in the UK's trading policy as a non-negotiable. The Department for International Trade's own 'Trade Tracker'

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reveals that two-thirds of Britons identify respect for human rights as their most important characteristic in selecting trading partners, followed by high standards for health and safety, and high standards for animal welfare and food preparation.⁷⁴ When asked to only select one singular trait, Britons continue to select respect for human rights (23%), however economic strength becomes of greater relative importance (18%). In fact, Britons are the people, alongside Swedes, most likely to prioritise human rights, with 50% of citizens stating that the UK should only trade with countries that have a good human rights record, even if it harms the economy, compared to the global average of 36%.⁷⁵

However, it is important to note that values are also held up against other priorities by the public, and generally become 'second-order' issues compared to the primary focus on economic growth. For example, in considering the full scope of objectives they hope that free trade will achieve for Britain after leaving the European Union, Britons focus on strengthening the UK economy (41%), creating new jobs in the UK (41%) and increasing UK exports (28%).⁷⁶ When presented in this manner, 'softer' and more socially based issues such as improving the living standards of those in developing nations and being committed to the promotion of social equality, are seen as much less significant in comparison to economic priorities. As such, it could be anticipated that, should they come into direct competition, the British public is likely to accept some degree of compromise from the UK Government on values in order to achieve economic growth priorities in free trade agreements.

Nonetheless, there is reason for caution. The substance of free trade negotiations operates at a new framework of international engagement and domestic politics. The British people have not been made accustomed to the scope and nature of these forms of compromise, and the tendency of the Brexit conversation to move into a hyperbolic rhetorical space on all sides has certainly not ameliorated public understanding of the realities at stake. Many citizens are not even aware of the degree to which negotiations can produce asymmetrical benefits, nor does the concept of the possibility of failed objectives factor substantively into their choices. Therefore, it is important to consider public opinion data on these subjects as an indicator of citizens' instincts, rather than necessarily capturing the true projected nature of its future state as the public conversation moves into a heavily mediated space of public deliberation.

The Brexit Paradox and Changeable Public Opinion

The Vote Leave campaign and its leadership team, and the governing Conservative Party in its wake, have been keen to emphasise that the Brexit vote should be seen as an ‘outward-looking’ act, which paves the way for a more ‘truly Global Britain’.⁷⁷ The paradox has been, that on average, Britons who voted to leave the European Union in the 2016 Referendum were traditionally more likely to favour trade protectionism, stronger border controls, and a ‘Britain First’ approach to international affairs.

The BFPG’s annual surveys of public opinion have particularly emphasised the strong distinction in views regarding foreign policy and international affairs between Leave and Remain voters, with Leave voters overall more inclined to support isolationist positions and express fear and concern regarding policies or approaches emphasising international cooperation.⁷⁸ NatCen’s research in February 2018 found that 50% of those who voted for Brexit in 2016 had come to favour limiting imports of foreign goods, to protect British producers, compared with 24% of those who voted Remain.⁷⁹ Other surveys have found that just 9% of Leave voters chose ‘better trade opportunities with the wider world’ as their principal motivation for voting Brexit.⁸⁰

The gulf between the internationalist ‘Liberal Leavers’ at the helm of the Leave campaign and the governments that have followed to implement its mandate, and the instincts of the citizens who supported their campaign and brought them to power, presents a unique challenge for governance. The Johnson Government has sought to resolve this unique situation by pursuing a social and political contract built around a stronger balance of security and openness. As one of the most prominent policy areas in the post-Brexit political arena, and given its position at the direct intersection of these two forces needing to be carefully balanced, the messaging and substance of the Government’s trade policy will need to tread an especially careful line.

Nonetheless, public opinion has been evolving rapidly, and appears to be especially politicised around the issue of trade, due to its prominent connection with the Leave campaign and the Global Britain narrative that arose as a result of its success. The BFPG’s research in early 2020 found that, in fact, it is now those who supported the Leave campaign in 2016 who are most in favour of the Global Britain project prioritising a view of the nation as a champion of free trade, and who are least concerned about almost every aspect of the forthcoming trade negotiations. Remain voters are also now more concerned about every major aspect of trade negotiations than Leave voters. What this data suggests is that the powerful narratives of the Leave and Global Britain project have securitised Leave voters to some degree, and that this message has been sufficiently powerful to overcome their previously held instincts.

Concomitantly, Remain voters have been made so viscerally insecure by the relationship between trade and the Brexit project, that many of them have been convinced to abandon their traditional instincts towards supporting international openness and connectivity. It is unclear as to whether either of these astonishing shifts in public opinion is likely to endure throughout the national conversation, as civic education levels on trade – including its compromises – rise, and the political dynamics as expressed through the major political parties become more established.

It is difficult to imagine that the hard-wired instincts that citizens hold towards their identity and values can be disrupted in a manner that extricates trade as a single issue from the much broader set of issues in which it is contained. Especially because, as we note earlier in the paper, these instincts reflect a complex mix of hard-wired ‘world views’, personal experiences

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and political identities. Nonetheless, the dramatic evolution of public opinion on trade in the UK around the Brexit debate does indicate the capacity of both political actors and the media to shape powerful narratives around this subject. We must therefore come to expect a certain degree of volatility within public opinion research around the issue of trade, subject to the maturation of the political debate and the resilience or fragility of the new political realignment that has formed following the 2016 EU Referendum.

Gaps in Understanding of Public Opinion

The existing canon of literature on public attitudes to trade is constrained both by research limitations and research gaps. For example, it is evident that some degree of ambiguity exists between Britons' level of active support and active opposition to free trade, which are not represented equally. This reflects the relatively high proportion of Britons who "neither support nor oppose" Free Trade Agreements or are unsure of their opinion. The relatively high degree of uncertainty regarding free trade positions reflects the fact that public knowledge of free trade is limited, with only around 20% of Britons exhibiting a high level of knowledge of trade-related issues.⁸¹ This is understandable, given the lack of domestic political debate regarding trade policy over recent decades; however, it presents a tremendous challenge of governance to seek to educate a population as we re-assume ownership over this important economic and social lever.

As we have discussed above, we know that women are especially likely to respond with uncertainty on questions of trade – a phenomenon often repeated across surveys addressing political and economic issues, which reflects a range of entrenched structural influences. This trend, however, has not been thoroughly interrogated with regards to trade as a specific subject – it is unclear, for example, whether trade is seen to be rooted in an abstract economic domain, detached from individual social and community experiences.

We can also observe disparities in engagement, interest and preferences around trade pertaining to social class and income. While, as we have explained, there appears to be a high degree of political volatility around the trade conversation, which is up-ending many of these deep-seated principles, the very long-term trend – which may ultimately endure – is towards Britons from lower socio-economic backgrounds being considerably less amenable to free trade. This may reflect a sense of a greater degree of individual exposure to its potentially negative effects; it may also speak to broader insecurities around the concept of globalisation and the reimagining of the political settlement. Again, further research within this area would be welcome.

Another area of demographic distinction within existing public opinion data is the fact that young people are consistently more supportive of free trade, more relaxed about deregulation, and potentially more willing to make compromises to secure free trade deals. They have also historically been more supportive of proposed trade deals including NAFTA⁸² and TTIP.⁸³ It is unclear as to why this is the case – although it may play into broader instincts among the younger generations towards openness and connectivity and support for globalisation more broadly. It may also be due to perceived personal benefits of trade with young Europeans (aged 15-24) more likely to say they have benefitted from trade than Europeans aged 55-and-over (71% to 51%).⁸⁴

In terms of the constraints in interpreting public opinion on trade, it is also true that existing public opinion data can be heavily influenced by framing. Due to the relatively low salience of the issue of trade, it appears that the framing effect on survey questions can be considerably larger than for other topics. For example, when Britons were asked whether they would support or oppose introducing tariffs to protect British industries, 46% supported their introduction. However, when asked whether they would support introducing tariffs if it necessitated higher prices for consumer goods, 48% said they opposed the introduction of tariffs.⁸⁵ These findings capture the challenge around communicating the very nature of Free Trade Agreements, which necessarily involve 'give and take' negotiations and inspire trade-offs – often providing asymmetrical benefits to different groups in society.

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There is also evidence to suggest that when citizens are given greater information around these trade-offs, or a more precise definitional framework around the concept of free trade, that they may become less enamoured with the concept of free trade. The more they are interrogated about the components of Free Trade Agreements, the more fluid their positions become. For example, when asked whether Britain should cut tariffs to lower prices and encourage freer trade between countries, 46% of Britons agreed compared to 27% who favoured increasing tariffs. Yet, when asked more generally about whether tariffs have a positive or negative effect on the British economy, 69% of Britons were either unsure or thought tariffs had either no effect or a positive effect on the UK economy.⁸⁶

The limited existing research regarding the 'trade-offs' inherent in trade negotiations suggests that, when confronted by these compromises, voters tend to make contradictory choices that can only be described as a 'have your cake and eat it, too' approach. This phenomenon has been especially visible in attitudes towards the UK's free trade negotiations with the European Union, and may certainly reflect the changeable nature of political positions on the issues at stake – where stances previously unconscionable suddenly become the only true manifestation of the Brexit mandate.⁸⁷

Finally, the significant degree of dynamism in the nature of public opinion around free trade in the wake of the Brexit debate, means it is difficult to confidently interpret the direction of travel of attitudes over the coming months and years. Undoubtedly, as the discussion moves from being simply theoretical, and even ideological, into a space where citizens are made more fully aware of the costs and benefits of free trade on a personal, community and national level, it would be safe to assume that public opinion will fragment and reassemble – potentially around different axes of polarisation.

One of the most challenging aspects of the social landscape that we are unable to assess with any certainty at this stage is the degree to which the power of these new identity frames around the Leave-Remain and party-political divides will be able to enact towards the resilience of public opinion, or whether much deeper, traditional structural tribalism around 'open' vs 'closed' world views that precipitated the EU Referendum will reassert themselves more strongly.

A number of additional areas of research yet to be explored within the context of free trade pertain to emerging trends manifesting within the broader foreign policy context. Firstly, it is clear that citizens' attitudes towards different nations, and perceptions of their behaviour as 'good' or 'bad' global actors, is playing a role in shaping their preferences regarding immigration source countries. It would be useful to understand the extent to which geopolitical perceptions, as well as domestic political polarisation, influence citizens' favourability towards trade deals with certain nations.

Secondly, we do not yet possess a sophisticated understanding of the interactions between contemporary foreign policy views and attitudes towards trade, as these are experiencing a high degree of volatility. It would be helpful to explore whether protectionism continues to align with anti-interventionism, as an 'isolationist package', or whether the potential distinction between these positions demonstrates a degree of erosion towards the 'world view' framework within public opinion research. Due to the current political contexts within each nation, it is possible that citizens in the United States and the United Kingdom are beginning to exhibit unique patterns of behaviour on these issues – however, as we have previously mentioned, it is unclear as to how shallow or resilient the contemporary political situation in the United Kingdom will prove.

Thirdly, more work needs to be done to better understand citizens' policy choices within the framework of negotiations. Conjoint analysis, which allows researchers to present options in competition to reveal 'true' preferences, would be useful here, given the nature of decisions taking within Free Trade Agreement discussions. An extension of this, which would also

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add significant value to the policy-making environment around trade would be projects designed to specifically explore how to effectively emphasise the productive nature of compromise to citizens – especially in an age where populist and tribal rhetoric on all sides of the political spectrum pedals consensus-building as a form of weakness.

This is the first of a series of papers the BFGP is publishing, exploring the social dimensions of the UK's trade policy debate. Future papers will be published on www.bfpg.co.uk.

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