



POLICY RESEARCH REPORT NOVEMBER 2020

National Trade Conversation: What really matters to consumers about future trade deals

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Foreword

The UK is developing trade policy and negotiating trade deals as an individual country for the first time in over 40 years. The success of these new deals will ultimately depend on the extent to which they deliver on what matters most to people in their everyday lives. The purpose of Which?'s National Trade Conversation has been to give people a unique opportunity to say what their priorities are when the breadth of issues that could be part of trade talks are explained.

Trade deals have the potential to bring many benefits for consumers. This includes greater choice of goods and services and lower prices, as well as wider benefits through economic growth. They can also impact on the types of safety and quality standards people can expect, the extent to which consumer rights are delivered, how goods and services are provided and the extent to which the UK meets other global commitments, such as tackling climate change.

Trade policy can appear to be a complex and technical area, but it is critical that the issues that go to the heart of the UK's future approach are explained and debated publicly. Trade talks have often stalled or failed because of a failure to understand the public's views early enough in the negotiations and ensure that they are reflected in the outcome and the trade-offs that are made.

As the government takes forward multiple negotiations with its priority countries (the United States, Australia, New Zealand and potential accession to the Comprehensive and Progressive Trans Pacific Partnership) and finalises a new deal with Japan, it is vital that it understands people's expectations and ensures that they are reflected in these talks and the texts that result from them.

Rigorous consumer research and insight sit at the heart of how Which? champions consumers' interests. The National Trade Conversation uniquely engaged people from around the country and from all walks of life. By involving key experts, government departments and interest groups, people were able to go beyond what initially appeared as a highly specialised area, and explore in-depth how the UK trades, how trade deals work and what issues could be on the table.

The focus of the discussions was on what matters most to people about the consumer aspects of trade deals when the risks and benefits are explained in detail. There was a remarkable amount of common ground across five dialogues in five different locations in the UK, with four clear priorities emerging relating to: maintaining standards, data protection, regional equity and protecting the environment. The government therefore needs to ensure that the views expressed by people in the dialogues and the principles that shaped their conclusions are taken into account in future rounds of trade talks. The Which? dialogues give a clear sense of what people across the UK expect our trade policy to achieve.

The National Trade Conversation is the first of its kind, a process of consumer engagement on trade conducted in such breadth and depth. It reinforces the importance and value of effective public engagement, showing that people's ability to engage with and debate complex issues should not be underestimated. Consumer confidence will be crucial for the success of the UK's new trade policy and further public engagement will be essential to ensure this.

Rocio Concha
Director of Policy and Advocacy

Executive summary

This report is about what consumers believe should be in the minds of the UK's negotiating teams as they work to agree new trade deals.

Which? commissioned research to get an in-depth understanding of consumers' priorities for trade deals and to represent their voice to government, business and third sector organisations involved in the UK's trade negotiations.

The research used a deliberative approach. We conducted dialogues in five locations across the UK, engaging with 97 people recruited to reflect a cross-section of each locale. The process – involving over 12 hours of information sessions, facilitated discussions and reflective tasks, across two weeks – gave participants an opportunity to explore trade deals in great depth.

Consumers' priorities for trade deals

How we arrived at the priorities

Throughout the research, we asked participants to think about **the consumer aspects of trade deals that matter most to them**.

To help them in this task, we presented evidence on a certain topic in each workshop session. In workshop 1, participants learnt about what the UK trades, why and how trade deals are made. In workshop 2, they explored potential trade deals with Australia, New Zealand, USA and Japan and their respective objectives for a trade deal with the UK. In workshop 3, participants learnt about the influence of trade on food, other consumer products (such as cars and cosmetics) and finally learnt about digital services in both workshops 3 and 4a.

Throughout the process, participants questioned the evidence, probed for more information, listened to each other's views and reflected on the implications for their lives. The dialogues covered a wide range of issues such as the implications of the use of tariffs, the opening up of our markets to more overseas competition and vice versa, and to what extent Government should change or align standards of goods and services with other trading nations. It was through this lengthy and immersive process that they came to define the priorities they want government to hear.

The overall priorities participants put forward at the end of the deliberative process show how being a consumer is interwoven with their wider views as citizens of the UK. The main priorities shown below were supported by most participants in most locations.

1. Maintain health and safety standards for food and products

The deliberations around food and other products (such as cars and cosmetics) highlighted the main issues intrinsic to the negotiation of goods in trade deals - such as how prices consumers pay for goods could be lowered by the reduction of tariffs or simplifying custom processes. However, the issue which mattered most and dominated discussions was the implications of differences in standards between the UK and its trading partners. After weighing up 12 hours of reflection, most wanted to **maintain standards** across the board. The reasons for this are shown in the top box below.

2. Maintain data security regulations that protect consumer rights

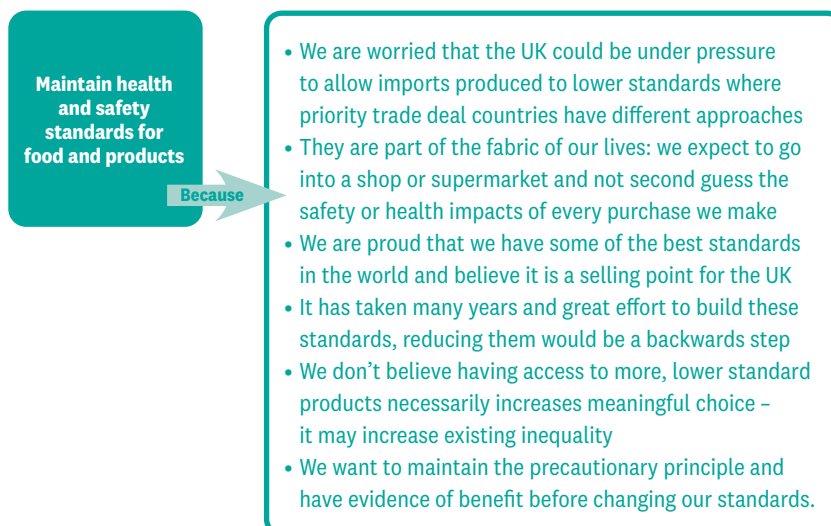
Participants were shown Government objectives for digital trade and they could see the opportunities for big business and the economy to make the trade of goods and the transfer of services much easier and faster. But there were widely held concerns about what the implications might be for the protection of consumer data and online rights in order to facilitate free flows of data that enable smoother digital trade. The majority view was that a weakening of an already imperfect General Data Protection Regulations (GDPR) regime would remove the necessary minimum protections consumers need against hidden and growing online harms. More reasons for this priority are shown in the first box on the next page.

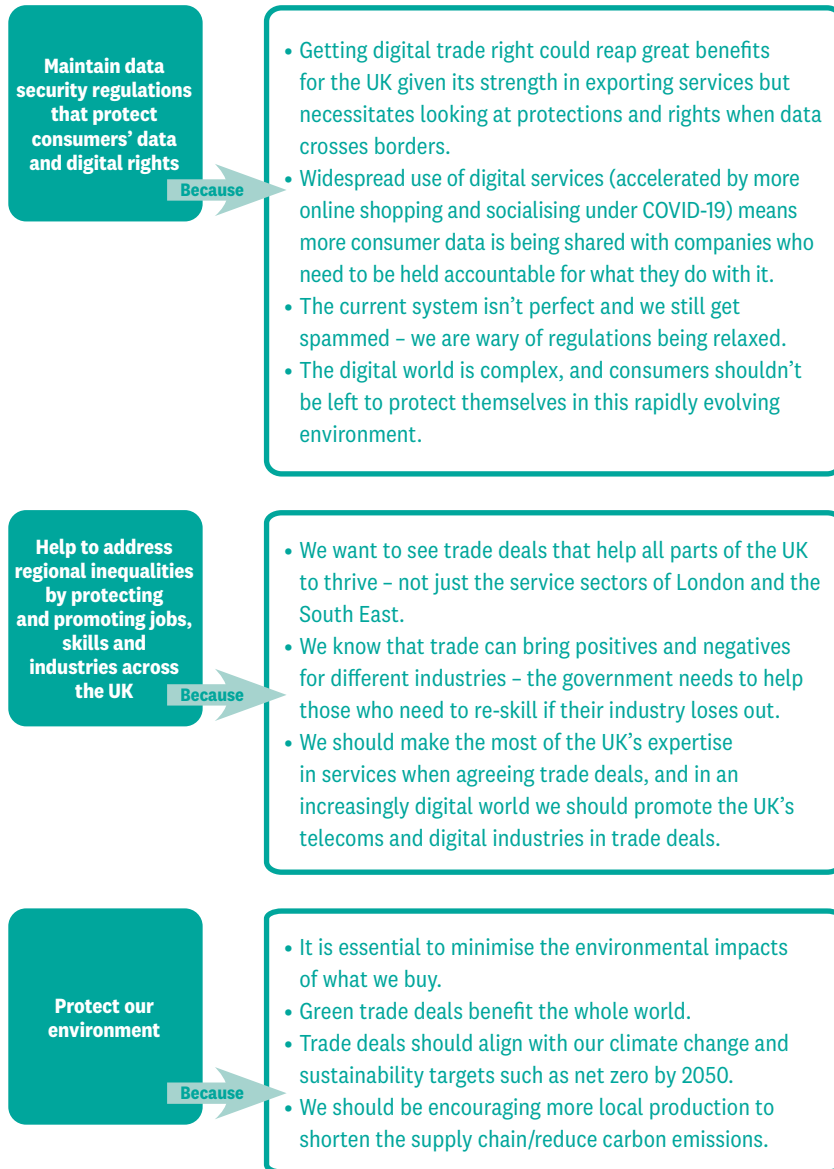
3. Help address regional inequalities by protecting and promoting jobs, skills and industries across the UK

Trade (and therefore trade deals), was seen as having the power to either improve **regional equity** or exacerbate existing inequalities. Participants wanted to see trade deals help all parts of the UK to thrive – not just London and the South East. They knew that trade brings positives and negatives for different industries, with trade in services more important to some regions, while manufacture of goods and the production of food (and farming specifically) would still be most significant for others. They wanted government to help those who would need to re-skill if their industry loses out. Why this matters is illustrated in the second box on the next page.

4. Protect the environment

Calls to **protect the environment** coursed through many of our conversations with participants. They wanted trade deals to help them minimise the environmental impacts of what they buy. Climate change and the carbon footprint from increased trade were raised in the discussions – and people welcomed the specific focus by some countries on incorporating environmental protection into negotiating priorities. Participants wanted to see that the UK's trade deals align with our environmental and sustainability targets. Why this matters so much is explained in the final box on the next page.





Our aim was to understand the range of views rather than to achieve consensus. There were a few participants in all groups who did not support every aspect of the priorities, or personally had other higher priorities. For instance, a minority of participants thought importing products produced to lower standards, and the wider choice this would provide would be acceptable, given a number of provisos and caveats. These minority views, along with the nuances of the discussions that led to these priorities are explored in the later chapters of this report that focus on food, other consumer products and digital services.

The principles that underpin the priorities

It was clear from our analysis that there are four cross cutting principles underpinning what really matters to consumers.

1. Fairness and trade ‘for good’: A trade deal should be beneficial for all involved: to governments, industries (large and small) and citizens both here in the UK but also for our trading partners. This underlying principle is evident across a number of priorities. For instance, there were concerns that trade deals **could exacerbate existing inequalities domestically**. For example, people want to be reassured that irrespective of their income and background consumers can expect to eat food or buy electrical products that are made to certain safety **standards**.

Equally, people felt the UK has a duty of fairness particularly when making trade deals with smaller emerging economies. This would allow consumers to have the confidence they are making responsible consumer choices – from options that are free of exploitation and that meet the **social and welfare standards** that we have come accustomed to.

2. Longevity/Deals are future proofed: People wanted to take time to strike deals that would help to deliver a world we want future generations to inherit. They wanted to ensure negotiations took into account, and could respond to, things we cannot fully yet know about but are likely to happen – such as the extra measures that will be needed to prevent further climate change, potential future pandemics like COVID-19 and the adoption of rapid changes in the skills and technology needed to be a leading global economy. This clearly underpins the priority around **maintaining data and online protections** whereby it was felt that the digital world is changing so quickly, that to weaken existing standards would be too risky. This principle also helps explain why the precautionary principle was so central to how participants thought about **maintaining health and safety standards** of products where knowledge is uncertain or things are changing so rapidly.

Given the National Trade Conversation took place during a pandemic lockdown, it is also not surprising that there was a view the UK should be scanning the horizon for future opportunities and agreeing deals with newly developed overseas economies who would give us a diversity of partners and more resilient supply chains in years to come.

3. Deals representing the whole of the UK: Trade deals are perceived as London-centric and more input and scrutiny from representatives from all parts of society – in the regions and devolved nations – should be demonstrated and acted upon in order to build a sense of ‘we are in this together’. Participants from the devolved nations saw their region’s strengths and weaknesses as distinct from the UK as a whole and wanted trade deals that reflected the desires of all UK consumers from all 4 nations. Even though we asked people to consider what mattered most to them as consumers, they found it hard to think about issues purely from a consumer perspective and inevitably prioritised wider issues that affected them as citizens and the communities they lived in. This underlying principle is evident across a number of priorities but particularly reflected in the priority to address regional inequalities by **protecting and promoting jobs, skills and industries across the UK**.

4. Transparency in trade deals: Participants could see opportunities for the UK in entering new free trade agreements but that had come from their participation in an immersive research process lasting two weeks. They felt that trade deals need to be made more transparent for the general public to build trust in negotiations and consumer confidence. Participants felt that consumers are largely excluded from trade deals, and that their representatives talk very little about what

new deals could mean for them, their families and their communities – and therefore are left with little understanding about the process and the outcomes for them. Again, this desire to see ‘the workings’ and potential impacts helps to explain why many wanted to maintain the precautionary principle and have evidence of benefit before agreeing to **changes to our food or product standards** or to **digital protections**.

Points of difference across the UK

Whilst there was a great deal of commonality in participants’ priorities for the UK trade deals across locations, there were some clear points of difference.

In Northern Ireland, participants felt the most distant from the negotiations. This perception of not being involved or heard meant that Northern Ireland gave the greatest emphasis of all locations to transparency in trade deals and clear communication about their impact. There was relief among most participants in Northern Ireland that they would be shielded, for the time being, from any changes that regressed current food standards due to the Northern Ireland Protocol. But also considerable concerns that they would have less choice because suppliers would shy away from the complexities of how Northern Ireland is different to rest of the UK.

For Northern Ireland, South Wales and East Coast Scotland, protecting farming from being undercut by the lower standards of production in other countries was a particularly strong plea. Agriculture plays a bigger role in their economies and communities than in the English locations and they said they would feel the impact on farming more strongly.

Implications for UK’s negotiators

The public dialogue revealed important implications for consideration by those negotiating UK trade deals.

- The National Trade Conversation demonstrates that the UK consumer is a complex individual with a range of perspectives. It is inadequate to assume a simplistic view of the consumer, one which is wholly focused on choice and price. Whilst their priorities do take into account choice and price, it is in the context of how these choices affect the environment, health, employment and fair trade.
- Consumers need to trust that any products or services they buy have health and safety standards in place, so that they don’t have to take time and energy in scrutinising everything they buy.
- The current regulatory framework is seen as part of the UK’s reputation for quality products and services and in line with our national characteristics of striving for high standards. Participants asked for the trade negotiations to build on this strong regulatory platform and for it to evolve over time as the UK makes new, tailor made, trade relationships.
- Of paramount importance to many in the dialogues was for the UK government to apply a long term view to its trade negotiations and avoid quickly negotiated trade deals which have short-term gains, but longer-term harms for the health of the nation and the planet.
- The environment was seen time and time again by participants as a fundamental plank of any trade deal. Participants saw the strong link between trade and the environment and wanted UK trade deals to help deliver the UK’s net zero 2050 climate change target.
- With the UK now negotiating its own trade deals, consumers expect government to involve them through clear communication about what could change and the evidence and expertise guiding our negotiating goals.

Methodology

Our key research question for the National Trade Conversation was:

What matters to people about the consumer aspects of the UK's trade deals, when the risks and benefits are explained?

The National Trade Conversation was commissioned at the beginning of 2020, as a collaboration between Which? and our chosen research partner, Hopkins Van Mil (HVM). This partnership approach meant that both Which? and HVM took an active role in designing the research process as well as participating in both the project fieldwork and analysis.

We chose to use a deliberative approach for the research, given the complexity of the topic and the importance of participants having a meaningful debate. We decided to run a series of public dialogues with consumers around the country in order to understand their priorities and the reasoning behind them. The process included exposing participants to a range of evidence that would ensure they have a more detailed understanding of how trade deals work and how they are negotiated. Public dialogues have been recognised as an effective way to engage members of the public with policy issues and to gather their informed views on how future policy should be shaped. Dialogues give participants the space to critique evidence from a range of perspectives in order to give a considered response. Using the results from public dialogues helps policymakers make robust decisions that reflect the ambitions and concerns of the public and gives confidence in the legitimacy of these decisions.

We initiated the project by carrying out a series of interviews with a wide range of stakeholders with an interest in trade. The purpose of these interviews was to gather advice and suggestions on the design, purpose, scope and content of the dialogues. We interviewed stakeholders from a wide range of backgrounds, including academia, business, government, regulators and economists. The full list of interviewees who kindly agreed to give up their time for these interviews is available in the Thanks and Acknowledgements section on p. 50.

Advisory Group

We appointed an independent advisory group for the National Trade Conversation at the start of the project to ensure the process and materials presented to participants were accurate and balanced. Advisory group members represented a wide range of stakeholders, including retailers, businesses and government departments. The advisory group met three times during the project, providing feedback on the purpose of the project, structure and materials of the research (pre and post pilot) and to discuss emerging findings. Advisory group members, as well as representatives from other interested parties, were also invited to observe the dialogues whilst they were taking place.

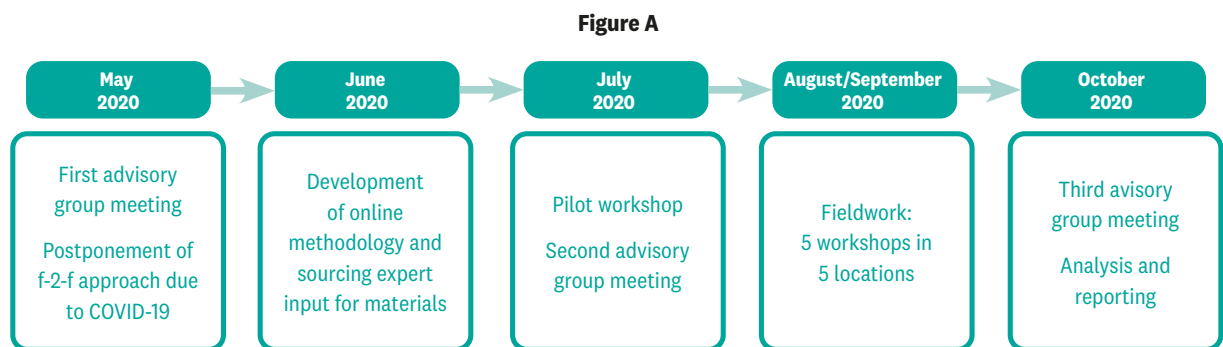
The members of our advisory group were:

- Tim Aldred, Head of Policy, Fairtrade Foundation
- Professor Tim Benton, Research Director in Energy, Environment and Resources, Chatham House
- Sir John Curtice, Senior Research Fellow at NatCen, Professor of Politics at Strathclyde University
- Miranda Dawkins, Deputy Director, Cross-Cutting Policy, Department for International Trade

- Jonathan Brenton, Head of Trade Policy (Non-EU), Confederation of British Industry (CBI)
- Andrew Opie, Director of Food and Sustainability, British Retail Consortium (BRC)
- Nick von Westenholtz, Director of EU Exit and International Trade, National Farmers Union (NFU).

Design detail

The original plan was to run two-and-a-half-day deliberative workshops, held in person in four locations around the country. We developed process plans for the structure of these workshops and fieldwork was planned to take place in the spring of 2020. However, the COVID-19 pandemic prevented us from being able to carry out the workshops using the planned face to face methodology. We then adapted our process plans so that the research could be carried out virtually, with fieldwork in August and September. An overview of the project timeline is shown in Figure A.



We made a number of adaptations to the structure to maximise the opportunities of an online methodology, including:

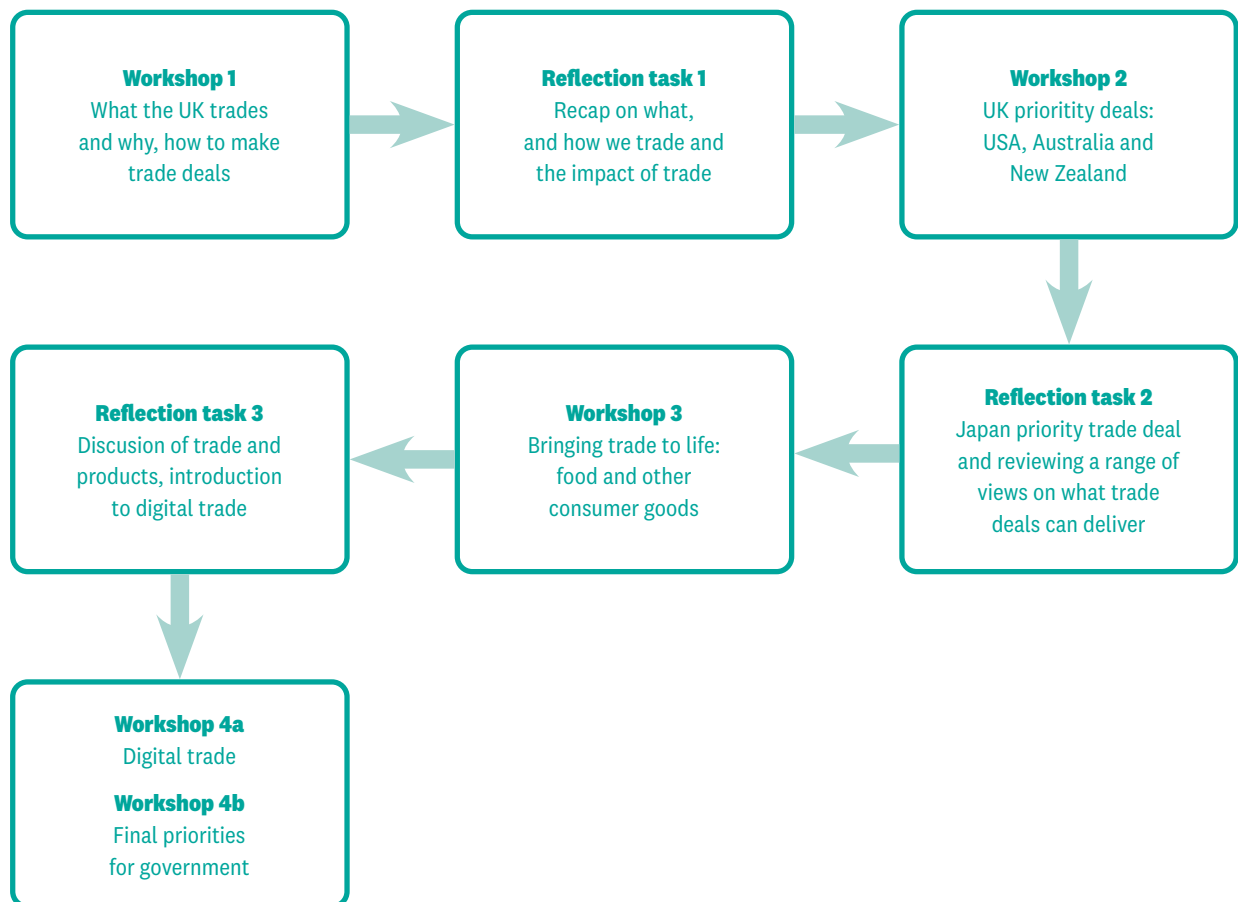
- Changing the structure from 2.5 days to five 2 hour sessions spread across two weeks, to minimise screen fatigue
- Using a combination of pre-briefing, online workshops and homework sessions to cover as much of the content planned in our face to face workshops as possible
- Reducing the size of small breakout discussion groups to 6–7 participants in order to encourage effective virtual deliberation
- Having experts ‘on call’ to answer questions raised by participants in workshops in order to provide answers during fieldwork, to facilitate engagement and maintain momentum between workshops
- Ensuring the videos of expert evidence played during workshops were kept to a length that retained participant attention
- Sending out a physical ‘workpack’ to all participants to give workshops a sense of identity and occasion, and provided participants with prompts and summaries of the material that could be referred to throughout fieldwork
- Using an online research platform as a community for participants. All materials shown in the virtual workshops were uploaded here, as well as hosting the reflection tasks which participants completed in between workshops. The platform also allowed participants to post questions for the project team, who uploaded answers from our panel of experts.

Each dialogue was made up of 8 ‘engagement points’ – five 2 hour workshops, and 3 intermediary reflection tasks hosted on our online research platform. This gave participants the chance to engage with a variety of materials to build their knowledge of trade and how consumers can be affected by the terms of trade deals. We showed participants videos from trade and other experts from a number of different organisations so they were exposed to a range of perspectives and

evidence. The full list of contributors can be found in the Thanks and Acknowledgements section, on p. 50.

The structure of the research is shown in Figure B below. A detailed description of the materials and topic guide for each workshop and task is included in the appendices. The workshop summaries in the appendices also reflect the content of videos shown to participants.

Figure B



Locations and recruitment

One aspect of the original face to face dialogue design that we decided to keep for the design of the online dialogues was the location specific feature, to enable us to understand views from distinct locations across the UK. We carried out the dialogues in five regions across the UK, with participants recruited from a 20-40 mile radius around a specific location in that region:

- Northern England (Newcastle/South Shields)
- South Wales (Cardiff)
- Northern Ireland (across the nation)
- East Coast Scotland (Dundee)
- Southern England (Swindon)

We selected these particular locations to ensure we captured a broad cross-section of consumers. The criteria were:

- Representation of all 4 nations of the UK
- A mix of urban and rural locations to reflect a variety of local economies and trade interests

- Locations with differing local voting behaviour in the 2016 EU referendum, including majority voting 'leave', majority voting 'remain' and locations where it was a narrow margin between the two.

A total of 97 people took part in the National Trade Conversation; each dialogue had between 18–21 participants. They were recruited to reflect as closely as possible the demographics of the local area, in line with the 2011 Census. Beyond demographics, we also made sure to recruit on the following characteristics:

- A broad range of life stages
- A mix of those who voted Leave and Remain in the 2016 EU referendum, in line with local results and those who didn't vote
- A mixture of urban and rural participants, with a maximum of 50% of participants to live in the venue town/city
- A range of views on how interested people were in the benefits for the UK of new trade deals.

The full recruitment specification and respondent detail can be found in the appendices.

It was important for us to make the research as inclusive as possible. This was reflected in our recruitment strategy and choice of locations. We also took a number of steps to optimise the benefits of carrying out the dialogues virtually, including:

- Running 'tech try-out' sessions on zoom for each location in advance of the dialogue starting. This familiarised participants with the technology used in the workshops, and gave them time and space to build their skills and confidence before the first session
- Each dialogue had a dedicated 'tech support' team member, who provided help and support if participants experienced any difficulties
- All video evidence was subtitled so that sound issues (either due to poor broadband or hearing difficulties) could be minimised
- Participant workbooks were designed so consumers had paper copies of key pieces of information to study and annotate.

Trade: ‘journey of understanding’

Chapter summary

An important component of the deliberation process was to ensure participants were provided with a solid understanding of the basics of trade and the breadth of issues that could be part of trade deal negotiations before they discussed consumer issues in depth.

Participants were engaged with the content presented and keen to learn more about trade and how it affects them as individuals and the UK as a whole. They raised many questions on a variety of topics.

There was a clear progression in participant understanding of the complexity of trade from the beginning to the end of the process, resulting in highly deliberated priorities.

Many external factors influenced how participants responded to the materials and discussions at hand, including the ongoing COVID-19 pandemic, UK-EU negotiations and the US presidential election.

Each of the 5 dialogues had a social and economic context in which participants considered the topic of trade.

Trade is a complex topic, hence why we chose deliberation as the most appropriate approach when conducting the National Trade Conversation. One of the outcomes of the project was that participants finished with a more detailed and nuanced understanding of trade than when they began. The fact that their understanding and views of trade progressed throughout the dialogues, before debating their final priorities, demonstrated the importance and success of our comprehensive engagement with our participants in order to get their informed and considered views.

It was important for participants to have a confident grasp of the topic of international trade before beginning to deliberate on what their priorities for future trade deals were. In the first workshop of each dialogue, participants were provided with materials that explained how, what and with whom the UK currently trades as well as how trade deals are typically negotiated and agreed. Participants were shown official statistics on trade from the ONS and DIT (tailored for Wales, Scotland and Northern Ireland), and heard video evidence from two trade experts about their views on the basics of trade and trade deal negotiations. Further details on what was presented to participants are available in the appendices, including summaries of the video content. Most importantly, we encouraged participants to voice any questions they had about trade as a result of this first workshop which we collated together and provided answers to on our online research platform. This was not only an efficient way to ensure participants were confident in their understanding of the topic but it also allowed us to emphasise from the beginning that the dialogues were a ‘journey of understanding’ for participants given the complexity of the topic.

Engagement

The questions raised by participants throughout the workshops reflected the level of engagement people had with the topic and their enthusiasm to learn more. Whilst there was some similarity in the types of questions raised across the different locations, there were also unique questions asked in each location as there were many things people wanted to learn more about. Not only did we collect questions on the finer detail of the materials presented to them – such as: “*Why is the*

Netherlands such a big trading partner in goods? What can we learn from them?” but there were also many questions on the fundamental nature of trade, such as: *“How long do trade deals last? Can they change with each new Government?”*.

Participant questions on the how, why, what and who of trade

What do they have to go through to make a decision? Who signs it off and what say does the public have?

What is the role of interim deals, what can be agreed and how does this link to WTO rules?

How are the prices lower for consumers when two countries trade?

To what extent does the Government actually take into account consumer input?

Is there an independent overseer of trade negotiations to ensure they are “fair”?

The main findings sections of this report contain more examples of the types of questions asked by participants, to demonstrate the breadth and depth of participant exploration of trade.

At the end of the process, many of the participants were keen to let us know how much they enjoyed learning and discussing the materials provided to them throughout the workshops. Once the research was completed, many of the participants were also inspired to keep up to date with future UK trade deals and the impact they could have on both individuals and the UK as a whole.

Evolution of understanding

It was clear as each dialogue came to a close that participants’ knowledge and understanding of trade had evolved over the course of each workshop, as reflected in the sophistication of their questions and discussions. There were a number of matters that participants were interested to learn more about throughout the workshops, from the materials shown to them and in discussions with other participants. Participants were surprised when learning more about certain topics, especially if it challenged their existing assumptions about trade. For example, participants tended to be generally unaware of the true scale of trade in the world today and how many areas of everyday life for UK consumers are affected by trade. The extent to which the UK trades with different countries – and what our main exports and imports are – was also a surprise to many of the participants. There was also a sense of surprise when people conceptualised how reliant many day to day items and transactions are on a free flow of traded goods, including those that are viewed as UK produced, because of the complexity of supply chains.

Participants were also pleased when learning about the value of goods and services the UK exported, as well as imported. Some participants had an initial assumption that the UK’s biggest trading partners were those who they were familiar with as a source of imported consumer goods, such as China. Learning about the volume of trade with EU nations was another surprise, as well as the scale of trade in services – a much less tangible and easy to understand component of trade. Indeed, the importance of services to the UK economy – and of subsequent importance in future trade deals - was not widely known. As a result of learning of the UK’s expertise in services, many were keen for the UK to use this as leverage when negotiating future trade deals.

We asked participants at the beginning of the first workshop and the end of the final workshop what three words came to mind when they thought about the term ‘trade’. Figures 1 and 2 show participant responses in South Wales, as an example, with the size of each word reflecting the

availability of items the UK doesn't produce, but also the impact it has on increased competition on suppliers and how it can encourage innovation.

Context

Finally, 2020 has been a year in which there have been many social and political events, media stories and aspects of public life that created the backdrop for people's participation in the deliberative dialogue. Participants' discussions reflected this context. The below figure illustrates the most pertinent of these:

	EU/UK TRADE NEGOTIATIONS	POLITICAL CONTEXT	CORONAVIRUS PANDEMIC	FIELDWORK
JUNE			Easing of some COVID-19 restrictions such as schools reopening.	
JULY	2 July - Negotiations ended prematurely. Negotiations later in the month end with little progress.	14 July - UK government announces 'Huawei to be removed from UK 5G networks by 2027'.	Pandemic ongoing, daily media coverage of UK and world deaths and infections. Furlough scheme in operation throughout. Local lockdowns throughout the UK.	
AUGUST	Further negotiations end on 21 August. Michel Barnier reflects on the time left and says it 'seems unlikely' an agreement can be reached.	24 August - Republican National Convention begins; Donald Trump accepts the presidential nomination.	Pandemic ongoing, daily media coverage of UK and world deaths and infections. Furlough scheme in operation throughout. Local lockdowns throughout the UK.	Northern England fieldwork 8 - 15 August. Southern Wales fieldwork 17 - 28 August. Northern Ireland fieldwork 18 - 29 August.
SEPTEMBER	Media coverage on the 6 September that government plans to legislate to bypass the withdrawal agreement/ NI protocol. 9 September - Internal Markets Bill introduced to House of Commons.	Coverage of Biden and Trump campaigning in lead up to US election. 11 September - Japan - UK trade deal agreed in principle.	Pandemic ongoing, daily media coverage of UK and world deaths and infections. Furlough scheme in operation throughout. Local lockdowns throughout the UK.	East Coast Scotland fieldwork 7 - 18 September. Southern England fieldwork 8 - 20 September.

Priorities for the UK's Trade Deals and the principles that underpin them

This chapter sets out the four priorities that participants want the UK government to have front of mind when conducting trade negotiations and the four principles that underpin them.

Each of the three small discussion groups in each location developed their priorities during the final workshops and they were shared in plenary at the end of the session. Before deciding on their priorities, participants were asked to think about the content of all the previous workshops and online tasks and to identify what was most important to them. As a result, these priorities are the outcome of participants deliberating the wide range of evidence that was presented to them about the opportunities and risks to consumers as a result of trade deals. Given that trade deals involve making compromises, the things participants said they would consider conceding to achieve the priorities are also included.

For the shared priorities we have drawn together the common priorities identified across locations with the reasons given by participants for each priority. We then set out four principles that underpin the priorities, drawn from analysis of the conversations that led to the priorities being advocated.

Our question asked about the consumer aspects of trade deals, but it is clear from their priorities and the principles that underpin them that for our participants, being a consumer is interwoven with wider views as citizens of the UK.

Shared UK Priorities

- **Maintain health and safety standards for food and consumer products.**
- **Maintain data security regulations that protect consumers' data and digital rights.**
- **Help address regional inequalities by protecting and promoting jobs, skills and industries across the UK.**
- **Protect the environment.**

Maintain health and safety standards for food and products

When explaining why **maintaining standards** mattered most, participants said they were proud of what they saw as the UK's high standards. They were concerned that the UK could be under pressure to allow imports produced to lower standards where priority trade deal countries had different approaches. They had trust in a system that had developed over many years to keep them safe from harm and that ensures the way products are produced is in line with their values, including consumer safety and environmental and animal welfare concerns. Greater choice wasn't seen as beneficial if it resulted in a reduction in these standards and imports that undermined these values. They didn't want to have to be vigilant when shopping to avoid products made to lower standards. They valued the precautionary principle – expecting that the long-term consequences would be fully considered before changing any standards.

“To safeguard us and our children's health and safety, and to guarantee a quality product. Also British reputation for quality.” Northern England

Maintain data security regulations that protect consumers' digital rights

The **maintaining data protection** priority emerged from a detailed consideration of the opportunities and risks relating to digital trade and what they heard about differing levels of protection in countries we could reach trade deals with. COVID-19 has meant people are doing more online shopping and socialising, and participants thought digital trade would only increase in the future. They said that even with the current General Data Protection Regulations (GDPR) regulations, they still get hit with spam emails and unwanted targeting, so they were wary of standards being relaxed and the problems increasing exponentially. The digital world was seen as an important part of trade, but given its complexity, they said they didn't want to be left to protect themselves in this fast changing world. They wanted to encourage other countries to share UK standards of consumer protection.

"Digital services [are] one of [the] main exports of [the] UK and growing. There could be harm from products sold online." Northern Ireland

Help to address regional inequalities by protecting and promoting jobs, skills and industries across the UK

Trade, and therefore trade deals, was seen as having the power to either improve **regional equity** or exacerbate existing inequalities. Participants wanted to see trade deals help all parts of the UK to thrive – not just London and the South East. They knew that trade brings positives and negatives for different industries, with trade in services more important to some regions, while goods would still be most significant for others. They wanted government to help those who would need to re-skill if their industry loses out.

"Protecting us if other countries go belly up – we can still produce [products]. [We] may need to diversify: people empowered to start up production if they see its run well. Protecting without propping up: encourage to innovate/adapt." South Wales

Protect our environment

Calls to **protect the environment** coursed through many of our conversations with participants. They wanted trade deals to help them minimise the environmental impacts of what they buy. Whilst participants acknowledge the importance of trade for the global economy, they wanted future trade deals that the UK negotiates to achieve an optimal equilibrium between the economy and the environment. Climate change and the carbon footprint from increased trade were raised in the discussions – and people welcomed the specific focus by some countries on incorporating environmental protection into negotiating priorities. More local production to shorten the supply chain and reduce carbon emissions was another recommendation by some. Most participants wanted to see that the UK's trade deals align with our environmental and sustainability targets. Participants also considered the opportunity for UK trade deals to influence other countries to be more environmentally sustainable.

"If we don't have a planet we can't trade" Southern England

The principles underpinning participant priorities

Maintain health and safety standards for food and products

Maintain data security regulations that protect consumers' digital rights

Help to address regional inequalities by protecting and promoting jobs, skills and industries across the UK

Protect our environment

Fairness

Longevity/Future proofed

Representing the whole of the UK

Transparency

Section summary

There were 4 overarching principles which underpinned participant priorities:

Fairness: A trade deal should be beneficial for all involved: to governments, industries and citizens on both sides. The UK has a duty of fairness particularly when making trade deals with smaller, developing economies. Fair deals will last longer and attract more countries to trade with us.

Longevity/Future proofed: In a world that is changing so quickly in terms of technology and skills, the impact of the COVID-19 pandemic and as overseas economies grow and become more sophisticated, participants thought that the UK should be thinking of the long term, scanning the horizon for new opportunities and agree deals that can adapt to the types of changes discussed.

Representing the whole of the UK: Trade deals are perceived as English-centric and lack representation from devolved nations. People wanted reassurance that even if benefits of new trade deals could not be directly felt by all regions, that each region's voice is heard, fully considered and that there would be strategies in place to ensure no-one was going to be left behind.

Transparency: Trade deals need to be made more transparent for consumers. Participants felt that consumers are largely excluded from trade deal negotiations and are left with little understanding about the process and outcomes.

Principle 1: Fairness and using trade ‘for good’

There was a strong sense in the discussions that a trade deal should be beneficial for all involved: to governments, industries and citizens. A trade deal that has a reputation for fairness was seen as likely to last longer, would attract other countries to do deals with us and potentially help negotiations conclude more quickly.

Fair trade

As the UK is one of the world’s major economies, participants saw opportunities to use UK trade deals to work with developing economies to support employment practices that are fair and ethical and production standards that help rather than harm the environment.

“On things like child labour in Africa for example, that’s one of the key things going forward, I think if we’re a bigger trade partner, we stand more chance of influencing other countries in matters such as that.”

Southern England

They recognised that trade brings with it competition and that this could be a force for good, by identifying trading partners in developing nations that produce goods fairly but competitively.

Standards that reflect our values

When discussing standards, the terms ‘red tape’ or ‘bureaucracy’ were rarely used. Instead the rules and regulations around our products and data were connected with the UK’s national identity and values, such as equity and protection from harm. This was exemplified in discussions where participants wanted to see:

- UK farmers and manufacturers competing on the same high standards
- trade deals that benefit small as well as large companies
- upholding the ban on animal testing and
- production methods that support rather than sacrifice the environment.

“As British, we’re far more concerned about animals than we are about people. If toiletries and cosmetics come onto the market that we know have been animal tested, I don’t think they would sell, so there needs to be regulation. That’s probably the biggest red line of anything we’ve discussed.”

Southern England

Whether a farmer or a banker, it needs to be a fair trade deal for all

Trade deals were sometimes perceived to benefit some industries more than others (e.g the trade of financial, legal and other services) at the risk of other industries such as manufacturing. Many felt that other industries – besides professional service industries – shouldn’t be forgotten in trade deals, to protect jobs and current high standards.

Fair pricing for producers and consumers

A bargain price is hard to resist. But some participants said their views on the fairness of low prices had changed during the workshops as they learnt more about trade and production.

“Before I got involved in the workshops, I wouldn’t think twice about paying a pound for something and not really think about where it came from. But knowing what people have to do to just produce one ingredient of part of a product, it just makes you think that we need to do more and insist more on higher practices so everyone involved is treated fairly.”

South Wales

Some participants said both consumers and producers had a responsibility to make sure fair prices are paid to ensure the workers making the products aren't being exploited with low wages and poor working conditions – but that consumers can only make these choices if the right (i.e. equitable) conditions are set out in trade deals.

Reflection on fairness – responsible consumerism

One of the reflections participants had when discussing the topic of fairness in trade deals was the idea of responsible consumerism. Many participants felt there was already a lot of choice on UK shelves and wanted to know more about what the impact of more choice for consumers as a result of newly agreed trade deals would mean. Many participants wanted to consume responsibly and felt that this is only possible if trade deals ensure new choices are built on ethical foundations.

When participants thought about responsible consumerism, they considered the importance of balancing trade with ethical priorities during negotiations. This would help reassure consumers that the presence of new items on UK shelves, and their subsequent purchase by consumers, would not have negative impacts on the natural environment, UK industries or on workers' rights here or overseas.

Principle 2: Ensuring longevity: Future proofing our trade deals

It's a marathon, not a sprint

Trade deals matter to consumers – participants could see the long-term impact they have on the choice of products and services available, on the jobs and industries in the UK and on the environment and their health. They believed that negotiating for the long-term good takes time and shouldn't be rushed.

But with the end of the transition period for the UK's exit from the EU fast approaching, there was a shared concern from participants that government would rush through sub-standard trade deals. Participants strongly felt trade deals should not be hurried through to fill any gaps left after leaving the EU. They wanted honesty, openness and clarity on what trade deals would deliver, no matter the timescale.

"I think the fear in all this is, because we're leaving everything to the last minute with the EU, we've got our backs against the wall, and a lot of these countries know that, especially America. They're hanging out until we've got no choice, but I'm not sure the government will be that transparent about what they do."

Northern England

"We should find the best trade deal, not allow these bigger partners to massively take advantage of our vulnerabilities. We might accept just for a quick win just to get something there."

Southern England

Scanning the horizon for opportunities

In a world that is changing so quickly in terms of technology and as overseas economies grow and become more sophisticated, participants thought that the UK government and its trade negotiators should always be scanning the horizon for opportunities. Some participants talked about sectors such as digital services and electric cars as offering future proofed benefits for our trade deals.

“We were talking about our services being one of the top things we export, but if it’s growing at such a rate, the countries that require our services may no longer require them in future if everything is improving and growing so quickly. The same for physical goods as well. The main point is how future proof are these trade deals if you’re exporting certain goods that people won’t need in the future, and vice versa?”

Northern Ireland

The massive economic shock caused by the COVID-19 pandemic led some participants to worry that reliance on exports in specific service sectors was a risk for the future, for example the impact on travel services. This concern also applied to our reliance on imports for our food. These participants wanted the negotiators to consider the UK’s resilience, in terms of the future prospects for our goods and services and the availability of food in their discussions with other countries. They wanted the UK to take full advantages of post-COVID opportunities.

“Promote UK services and get them into lots of new markets because we are good at them, we can upskill people, and it’s the future, when we won’t be affected by COVID so much. I think having some services industries negotiated and ready to export is important to get things flowing again post COVID.”

East Coast Scotland

Participants acknowledged that trade deals may have adverse effects for certain industries and asked that while the government plans how they will support those people who may lose jobs or need reskilling over the long term, that trade deals be forward thinking and flexible enough to allow the necessary transfer of overseas workers with skills, experience and different ways of thinking that are needed to bring prosperity to local economies.

“In terms of this levelling up regions, it might be a longer-term benefit as the change in skills that’s needed or bringing higher-paid jobs to different areas, but that’s not an immediate fix overnight.”

South Wales

Principle 3: Representing the whole of the UK

Trade deals aren’t devolved: the need for more visible representation

The perceived English-centric nature of trade deals and lack of representation from devolved nations in negotiations was a cause of frustration for participants in Scotland, Wales and Northern Ireland.

“This is where I believe London centric policies on getting trade deals for financial services will cripple our other industries as this is what seems to be our main mission in negotiations of trade deals leaving the other sectors vulnerable to cheaper imports”

Northern Ireland

“I find it interesting that Wales, Scotland, Northern Ireland, are probably some of the only countries in the world that can’t strike their own trade deals. It’s the country next door instead.”

South Wales

Some thought their nations would be better served if there was far more visible proof of regional interests and devolved nations’ specific consumer needs being heard, considered and reflected on by the Government. This point was particularly strong in Northern Ireland, largely due to the complex situation with the UK’s only shared land border with the EU. Participants felt there should be a ‘special trade zone’ to ensure Northern Irish consumer needs were met.

“Our trade deal is going to be different than the mainland UK trade deal, no matter what way it is done going forward. We are under separate regulations and standards, so whatever trade deal the mainland UK, London-centric Government does, they can do it whatever way they want, but it’s not going to be able to be transferred to Northern Ireland.”

Northern Ireland

But amongst some Northern Irish participants, even if they were to receive stronger representation in trade negotiations, there was a feeling of dissatisfaction. They expressed negative perceptions of the politicians who represent them, further bolstering their worries that the Northern Irish voice was going unheard and unvalued.

“Why aren’t our politicians more concerned with appearing? I can’t understand why Northern Ireland isn’t maybe more vocal, the politicians, on why Northern Ireland in the UK government’s eyes is down the pecking order, because it’s already got everything that it has, but we’re not going to see any benefits, we’re going to be stuck in no man’s land.”

Northern Ireland

Supporting local and small business

Participants thought that trade deals too often favour big businesses over smaller, locally run businesses and jobs. Participants shared a desire for the economic benefits of trade deals to be shared equally by businesses of all sizes. They felt particularly strongly about this when it came to the food industry, with many people voicing their support for the protection of local food stores over supermarkets.

“Again, building the economy, but not just for these big corporations, but for little Joe Bloggs that runs a greengrocer on the high street.”

Northern England

Principle 4: Transparency in trade deals

As the dialogue progressed, participants’ desire to understand the UK’s new trade deals and their impacts grew. The need for trade deals to be made more transparent for consumers was emphasised by many. Some participants felt that trade deals negotiations are dominated by governments and large business, and that consumers are largely excluded and therefore have little understanding about the process and outcomes of negotiations. Describing trade talks as ‘cloak and dagger’, this lack of transparency lead to a number of questions:

- why is information not more publicly shared?
- who is actually involved in these trade deals?
- who are we trading with and why?
- are government going to tell us what we are giving away?
- will government be clear about what we are getting in return?

Many felt that consumers should get more clarity on what trade deals would or wouldn’t deliver although some questioned the extent to which this was viable from government.

“They’re not going to tell us what they’re trading away or who they’re actually going to trade with.... Parliament, government’s taking that right away from us. We’re not allowed to know, are we? They’re not going to tell us what they’re giving away.”

Northern England

Participants also felt it was essential that layman's terms were used by government and the media to communicate with the public about trade deals. They felt there was no use publishing jargon-filled information detailing negotiations if the majority of people would have no comprehension of it. Trade deals affect everyone, so information should be accessible for all.

Listen to the consumer voice

When it came to standards, there were passionate discussions about potential changes not being quickly rushed through in private negotiations, but openly shared with the public, allowing consumers the time and space to share their opinions – and be heard.

“How involved are the thoughts, requirements, demands of the end user, consumer, considered in the trade negotiations. At what stage of the negotiations are these introduced and then implemented?”

South Wales

Participants felt reassured about the power of the consumer voice when reflecting on the outcome of the Transatlantic Trade and Investment Partnership and felt that this reinforced why consumer views had to be taken on board early in negotiations rather than risk rejection of a trade deal at the end of the process.

Reflections on trade offs

During the final workshop, participants spent some time thinking about what trade negotiators might have to compromise on to achieve the trade deal priorities they were identifying.

This was not a comfortable process. Some participants struggled to identify any compromises on standards, because any reduction felt like it would be opening the flood gates for reductions across the board. Those who said our standards could be flexed, said this had to be based on evidence and not lead to any harms to health, animals or the environment and should maintain quality. Other trade-offs discussed included:

- Giving up some consumer choice in the UK e.g. the car market feels saturated
- Lower tariffs on goods that aren't core UK industries: e.g. wine and clothes
- Lower tariffs on goods that meet UK standards
- Allowing more overseas workers temporary work visas
- Relaxing some areas of data protection to help ensure we kept food and product standards (minority view).

Location specific summary

Northern Ireland

- **Trade deals representing the whole of the UK** was a plea made across all groups in Northern Ireland. Of all the locations, they felt the most distant from the negotiations – characterising Northern Ireland as an annoying inconvenience, poorly understood by government.
- This perception of not being involved or heard meant **Northern Ireland gave the greatest emphasis of all locations to transparency in trade deals** and clear communication about their impact.

South Wales and East Coast Scotland

- **Trade deals that benefit people across the UK** came across particularly strongly in South Wales and East Coast Scotland. Changes to the car and coal mining industries in Wales meant they said the impacts of changes to what we import and export on jobs and skills needs to be actively managed. In Scotland, there were similar concerns about the future of local industries such as food and production drink (e.g. Scotch whisky and gin), farming (beef, salmon), transport services (shipping, in particular) and tourism.

Southern England

- **Environmental sustainability** was a trade priority for all groups in Southern England. Discussions there were particularly vigorous about the UK using trade negotiations to be a force for good in promoting sustainability.

Northern England

- **Fairness & power** were emphasised most in Northern England, driven by the view that fairness to both sides would make deals more resilient. Linked to this was the hope that **trade deals would not just favour big business**, but also work for smaller businesses too.

Country digests

Part of the deliberation process included showing participants the UK's negotiating objectives for its priority countries (and the objectives of the other trading country, if available): the USA, Japan, Australia and New Zealand. Participants assessed these respective objectives and discussed what opportunities and risks there were for consumers as a result of these potential trade deals.

The USA

Opportunities

It was clear to participants that it is important for the UK to secure a trade deal with the USA, given the size of its economy and its global influence, as long as the terms are appropriate. Participants were positive about those USA objectives which have a clear consumer benefit – such as reducing/removing tariffs on products like cars and clothing.

Risks

Participants saw more potential risks through a future trade deal with the USA than potential benefits, depending on the approach adopted by the government to the negotiations.

These concerns included:

- The USA was generally perceived to have lower standards and consumer protections than the UK, and participants were worried UK consumers could be negatively affected by a trade deal that prioritised economic benefits above everything else.
- There was a strongly held view that the UK should not accept food from the USA that was produced using methods currently banned by the UK.
- Participants typically were surprised to learn about the lower levels of consumer data protection and security in the USA compared to the UK. Participants wanted reassurance that a future trade deal with the USA would not compromise the levels of data protection they currently enjoy.

Balance of power

The balance of power in relation to the relative UK/USA trading positions was seen by participants to rest more with the USA than the UK. Reasons for this included:

- Most participants thought that given the USA has a larger economy than the UK's, the USA was likely to achieve more of its objectives than the UK when agreeing the terms of a trade deal.
- This imbalance of power was further nuanced by the view that given the end of the transition period of leaving the EU, the UK 'needs' a deal with the USA more than the USA needs a deal with the UK. Participants felt this could further strengthen the USA's bargaining power.
- When reflecting on the USA's objectives for a future trade deal with the UK, participants felt the USA had an aggressive approach with no indication it would be willing to compromise on any issues.
- The result of the upcoming presidential election in the USA was brought up as an important factor in what terms the USA would agree with the UK.

Australia

Opportunities

Participants generally felt the trading objectives of Australia and the UK were broadly complementary and that a trade deal with positive outcomes for consumers seemed feasible.

Participants were:

- Pleased to see the potential benefits of reducing/removing tariffs on a range of Australian consumer goods such as wine and food.
- Positive about the Australian objective to strengthen rules on digital trade and its promotion of more digital trade and were keen to see an Australia–UK deal achieve this.
- Positive about the possibility of a future deal including sustainability provisions about the environment and climate change.

Risks

Participant comments on the risks of an Australia–UK deal fell into three categories:

- Some participants were concerned about the environmental impact of increasing the trade of goods with a country on the other side of the world.
- Those from rural communities, particularly in our South Wales location, were concerned about the impact on UK farmers if quotas for meat imports were increased by a large margin.
- Many participants were surprised to learn that Australia permits some food production methods which are currently banned in the UK, such as the use of growth hormones in cattle. Participants did not want to see food produced in these ways to be allowed into the UK as a result of a trade deal.

New Zealand

At the time of the research, New Zealand had not released their negotiating objectives so participants had limited materials to discuss. Overall, many of the views participants held about an Australia–UK trade deal held true for a New Zealand–UK trade deal too, including:

- Positivity about the benefits to UK consumers if tariffs are reduced/removed on a range of consumer products, such as food and wine.
- Worry about the impact on the environment if the UK imports substantially more goods from New Zealand.
- Some concern that UK farmers could be adversely affected if higher volumes of meat from New Zealand are allowed.

Japan

The Japan-UK trade deal was agreed in principle on 11 September. This was during fieldwork. Dialogues in three locations had been completed by this date, with the remaining two dialogues ongoing. Given the advanced progression of the talks, we decided to include the main materials on a potential Japan–UK deal in a reflection task rather than a live discussion. The text of the Japan–UK deal was not available until after the research was concluded.

Opportunities

- Japan was perceived as a useful and important country for the UK to agree a trade deal with, given how much trade already exists between the two countries and the fact that the UK had been part of the EU when it reached a deal with Japan.
- Participants were keen for the UK car industry to benefit as a result of a deal with Japan, and thought a deal would likely be advantageous for jobs and UK manufacturing of cars. Given cars are an important good for both Japan and the UK, participants felt confident a deal could be reached that would be mutually beneficial.
- Japan was generally characterised as being a ‘high tech’ nation, with advanced electronic and technology sectors. As such, some participants imagined a deal could bring UK consumers a wider range of innovative goods.

- One of the benefits participants could see as a result of a Japan–UK trade deal was it facilitating the UK joining the Comprehensive and Progressive Agreement for Trans-Pacific Partnership, although the details of what the CPTPP could mean for the UK were not discussed.

Risks

There were few negatives that participants could see as a result of a Japan–UK trade deal. Some participants wanted more information on the reasons why the existing Japan–EU trade deal wasn't rolled over on the same terms and wondered if the UK was being disadvantaged as a result.

Diversity in trade

In discussing the four priority countries for new trade deals, it was clear that participants wanted to have trading relationships with a range of countries. This would not only provide choice to consumers but would also avoid an over-reliance on one source of products and services which could limit availability in the future. This concern has been brought into sharp focus by the recent COVID-19 pandemic experience.

Some cautioned against too much dependence on trade with the USA, and also to look for a wide range of trading relationships a little closer to home than Australia, New Zealand and Japan, and also with BRIC countries such as Brazil or India. Not only would this be good in terms of the environment, but some participants took the view that global consumerism provided an economic opportunity for developing countries who stand to benefit from greater global trade.

Consumer Themes: what matters to people about the UK's trade deals

Food

Section Summary

The role that food plays in our lives is rich and complex. Participants spoke about a wide range of different aspects of food in the context of trade deals. This meant that any changes in how it is produced and distributed would have far reaching impacts, beyond just choice on retailers' shelves.

Health was the most important concern for participants when discussing food standards because food and health are strongly linked with many participants asking: why import food that could cause health harms?

Participants often went on to raise concerns about animal welfare. The concept of 'you are what you eat' was brought up across most locations, with participants associating how animals are treated with the safety and quality of the food produced. Lower animal welfare standards in imported food led to some locations saying that UK farming and food production could be undermined by unfair competition.

Methods such as chlorine washes and hormone treatment were seen to be used to cover up/compensate for production processes that the UK would find unacceptable.

Some participants feared that if trade deals allowed imported food products to be made to lower standards, they would have to spend more time and mental energy working out what to buy.

Minimising the environmental impacts of the food we buy was discussed in terms of relying less on staple foods from other countries, such as apples and eggs that travel thousands of miles. Consideration was also given to discouraging food linked with deforestation by imposing higher tariffs and encouraging more local production.

Labelling and choice revealed contrasting views, with a few participants supporting the wider range of options and prices that could be offered by different standards of food, if labelling was clear to inform that choice. However, most participants believed that allowing lower standards didn't offer real choice at all.

How food was discussed in the dialogue workshops

Food is strongly associated with trade. It is the most tangible representation of trade in our lives, so inevitably food came up in discussions from the first workshop. However, it was in the third of our four workshops that we explored food and trade deals specifically.

We kicked off our food discussions with a video featuring a range of organisations with an interest in trade. In England, Wales and Scotland the video showed Which?, the Fair Trade Foundation, the National Farmers Union, Chatham House and the British Retail Consortium. To help explain Northern Ireland's position in the Northern Ireland Protocol we tailored their video to feature Which?, the Consumer Council for Northern Ireland, Fair Trade Foundation, Ulster Farmers Union, Chatham House and the Northern Ireland Retail Consortium.

After watching the video, participants talked about their views on the implications of trade deals on food. They discussed issues relating to increased choice, resilience, availability, the potential

for lower prices through tariff reductions and were also given examples of food standards and how they differ in different countries (see appendices). They were asked for their thoughts on the relative opportunities across the different deals, how issues such as standards, price and choice should be balanced, which standards should be maintained, or new ones adopted.

Participant questions on trade in food

- How would you negotiate a fair-trade deal with the US over the food imports in the UK, giving us customers good quality, for no added chlorine etc?
- What assurances can you give on health and safety and also would the products be labelled to the UK specifications?
- How will our standards of food quality be upheld in any new agreements with countries outside the EU?
- What plans are in place should a deal not be made regarding food supply?

The role of food in our lives

The role that food plays in our lives is rich and complex and participants had a lot to say about it. This is because they have experience of such a diversity of food and frequently purchase it, facing varied choices every day.

At the start of our workshops, we asked participants to share with us one thing that they associated with trade. Almost everyone chose a food item - some were chosen to demonstrate how trade brings us food we can't produce here in the UK, and other foods were chosen to raise questions about where products truly originate from – such as an icon of the British breakfast table, HP Sauce, produced in the Netherlands.

By the end of the dialogues, people appreciated the importance of food imports and exports in the trade deals that the UK has prioritised. Participants had spoken about a wide range of different aspects of food in the context of trade deals and felt that any changes in how food is produced and distributed would have far reaching impacts, beyond just choice on retailers' shelves.

Given the different food systems in place as well as some specific negotiating objectives around aligning standards in order to facilitate free trade, participants felt strongly that they be made aware of any proposed changes to the standards that assure the quality and safety of our food which we discuss in more detail below.

Health: do no harm

Health was the most important priority for participants when discussing the impact of trade on food standards and in particular how different countries had different food systems and standards. Because our food and our health are so strongly linked in people's minds, many participants kept returning to the question: why import food that could cause health harms? Health harms were seen as being caused by:

- **the way the food is produced**, such as hormone treated beef and its potential cancer risk, and antibiotic treatment of livestock that could lead to antimicrobial resistance in bacteria that infects humans – there were concerns even if the level of risks to humans are disputed by some experts.

“The amount of antibiotics they use is worrying, especially in the midst of a pandemic. Beef hormones, especially, in terms of long-term studies... there has been nowhere near enough work done to see what effects these have, and how much of it ends up in our food chain.”

East Coast Scotland

- **the impact of availability of cheaper, lower quality food on our diets** – that could make unhealthy food even more accessible in terms of price and availability e.g. cheap chicken and fast food outlets.

“You would be buying food you could afford, not necessarily the best choice for you, but what your income dictates you can eat or afford to buy. I don’t think that’s good for any group of consumers in any economy. That’s a bad idea.”

South Wales

Allowing cheaper, potentially more processed food into our national diet was seen as likely to increase to the rates of obesity and drive increased demand for already highly stretched NHS services.

Animal Welfare: a moral duty

Discussions about human health and wellbeing if food standards change were often linked to concerns about animal welfare. The concept of ‘you are what you eat’ was brought up across most locations, with participants associating how animals are treated with the safety and quality of the food produced.

Some practices, such as using chlorine washes on chicken to mask less sanitary livestock rearing conditions were suspected of compromising food safety. But broader than this, there was a widely held value that the way we keep and treat our animals in the food chain was seen as part of our moral and ethical duty to treat animals with care and respect.

“It all falls into place. If you treat the animals right, and don’t inject them with growth hormones, don’t inject them with antibiotics, don’t keep them in small cages so they have diseases, but you wash it off with chlorination, then the food is safer.”

Northern England

Additionally, it was felt to be wrong to lower animal welfare standards in imported food if it meant driving UK farmers out of business due to unfair competition.

“I hope the UK farming industry isn’t forced out of business through increased competition, and unfair competition which was mentioned... I think it’s really a valid point that if they’re abiding by standards that other importing farmers aren’t, then they could be unfairly driven out of business. And that absolutely should be prevented.”

Southern England

Putting the burden on consumers should be avoided

We take our food standards (and the associated quality and safety) for granted: this was expressed by many participants. Participants felt that the UK has standards, put in place by government, and that meant they can trust that whatever food they buy here is safe – something they don’t feel is true in all countries.

Some participants feared that if trade deals allowed imports of food products made to lower standards, they would have to spend more time and mental energy working out what to avoid buying in order to protect their families from what they saw as health or safety risks. Given their busy lives, they did not welcome this prospect and said it was the responsibility of government to provide a minimum set of standards that they could have confidence in.

“I would say upholding a standard would be very key for me, especially I know there’ll be a lot of people like me that just trust the supermarkets, trust the UK that bring in correct food, I don’t have to be looking at everything I’m taking.”

East Coast Scotland

Food allergies tended to amplify participants’ concerns around an evidence-based approach to food standards. Those who had, or had family members with, allergies said how important it was for them to have trust in the safety, quality and transparency of food standards.

Changing evidence and the role of the precautionary principle in food standards

A few participants talked of being open to changing UK food standards if there was new evidence showing that food would not only be safe for their health but also ethical (e.g. did not lower animal welfare). When thinking about the evidence used to assess food standards in the context of trade deals, a few participants said they thought evidence should be carefully scrutinised to ensure it is from an expert and ‘neutral’ source, free from vested interest or corporate lobbying. For most participants, the concept of the precautionary principle in the current approach to food standards made sense and underpinned their trust in the quality and standards of the food they buy now.

“So, maybe, the science isn’t quite there on some of the stuff and it’s a bit of the chicken and the egg, some stuff ends up in the food chain that maybe shouldn’t be there and so, they don’t legislate against it until it’s proven to be bad for you. Well, that’s the wrong way round, it shouldn’t go into the food chain until it’s proven it’s safe. So, I think that’s where keeping standards high to begin with is better than lowering the standard and going off that.”

Northern England

A minority view worth noting here, is a challenge as to whether the UK’s standards are actually higher than other countries and a few people wanted to emphasise that different standards may not mean lower standards.

“No proof has been provided that their produce is of a lower standard – seems to be a lot of nationalistic views of superiority being pushed by the government. Different does not equal worse.”

East Coast Scotland

Nevertheless, the role and use of experts, such as food scientists, in trade negotiations was discussed, alongside the role of consumer representatives. There was concern that UK negotiators could be putting forward negotiation offers that could have long term impacts that are not currently being taken into sufficient account, such as impacts on our health or on our farming and food production industries.

The role of food trade in helping, not harming the environment

Earlier chapters of this report make clear that the impact of trade deals on the environment is an important priority that participants want the Government to include in negotiations. Here we outline some specific findings relating to food.

Some participants thought that we should reduce food imports travelling long distances (e.g. from New Zealand and Australia) that we could produce here. They saw this as a win for the environment – lower carbon emissions from transport – and win for the UK economy and food sector.

Additionally, importing foods out of season (such as strawberries) was seen by some participants as an example of an environmental harm, where we are sacrificing the environment for the sake of choice. In contrast, a handful of participants supported the current levels of food importation because they thought producing more food ourselves would lead to losing more of our green spaces to farming and in turn threaten our nature and landscape.

Very specifically, if a change in food standards led to importing food treated with pesticides that are currently banned, some participants feared that this could lead to a slow burn catastrophe for our environment.

“If we’re introducing a lot of products and food, when you’re washing some of these vegetables that are treated with pesticides that are banned in the UK, it may not affect things now, but when it comes to treating it and when it comes to it ending up back in our drinking water supplies, there’s actually quite a bit of cause of concern that I think people may not be aware of.”

South Wales

As well as thinking about impacts on the UK environment, some participants also thought the impacts of the food we import on the environment and people of the countries where they are produced should be considered. Issues such as deforestation to grow crops and farm cattle were highlighted as something that trade deals could help resolve or discourage, and that cheaper food for UK consumers at the expense of global environmental protection is not desirable.

Participants recognised that price as well as choice was the reason these products were being imported and that more local production could mean higher prices. This was seen as having the greatest impact on lower income families, but many participants came to the conclusion that the health of our planet was an overriding concern for all of us. We discuss choice and price in more detail below.

Choice: a universal good?

Choice of a range of goods made to the UK’s production and safety standards was seen as important to cater for different consumer needs and preferences. However, when discussing choice in the context of lower food standards, different views were expressed.

For a small number of participants, wider choice offered by importing food of lower standards was welcomed providing the choice is truly informed (e.g. by clear and accessible labelling) and offers something new such as lower prices.

But for most participants, wider choice is detrimental if the lower standard products cause harm to individuals, the environment and to valued industries such as farming. The majority of participants only supported widening choice if based on maintaining standards, and felt uncomfortable with a wider choice of food made to lower standards. They were sceptical of choice if it meant putting lower quality food on the shelves at a price point that meant it would be bought by people on low incomes – for whom the only choice is the lowest price. This was felt across all locations:

“Choice is an illusion if the choice is to have something dangerous.”

South Wales

“People aren’t going to have choices because if you’re in a low-income family, you’re not going to have the choice if the hormone injected beef or the pesticide fruit is really lower in price, you’re not going to have a choice.”

East Coast Scotland

“We aren’t thinking about the people who can’t afford to choose between chlorinated chicken and free range. I’d buy the cheapest chicken however it was produced because that’s all I could afford. That’s not choosing, that’s just life.”

Southern England

“I don’t think choice overrides the need for safe and good quality products.”

Northern Ireland

Northern Ireland is unique in the way in which its standards could stay aligned with EU standards. The assumption, based on the current UK and EU approach was that this would help maintain standards. However, there were concerns among Northern Irish participants that this would result in a reduction in choice for them, compared to the rest of the UK or that prices would be increased for them.

“I think we need to avoid being at a disadvantage due to this NI protocol, as well. We don’t want to be subjected to fewer products just because we have higher food standards here. We need to ensure that there’s a choice and a variety.”

Northern Ireland

Labelling – informed choice vs a last resort

Both labelling and price are intertwined with views on choice. The small number of participants who saw widening choice to include lower food standards as a good thing leaned heavily on labelling to support informed choice and pointed at lower prices as helping with affordability.

For most participants, labelling was discussed in the context of being a ‘last resort’ for managing risks if food produced to lower standards enters the UK through new trade deal agreements. They saw labelling as a way of ‘warning’ consumers of the different standards used to produce the food – helping them to identify what to avoid buying.

“So, if they’re using pesticides, and if they’re using hormone growth in Australia and the US, if it’s on the label, then the consumer has the choice and says ‘I don’t want to risk getting cancer or whatever else. Therefore I’m not going to buy it.’ And I think that’s what we have to really go for in these trade negotiations. It’s to make sure these countries label their food properly and clearly.”

South Wales

However, many participants caveated this position by saying that labelling may not be an effective way of providing informed consumer choice for a range of reasons such as:

- food buying is habitual, so they pay little or no attention to labels
- people don’t feel the need to scrutinise labels because they currently trust UK food standards
- the language on labels isn’t always clear
- it would be impossible to fit onto a label all the information about different standards to make an informed choice.

Information presented in the workshops about a ready meal being labelled a British chicken pie, when the chicken could be sourced from Thailand, added to some participants’ scepticism about how far labels could be relied on to guide food choices.

Food labelling was also seen as a quiet way of bringing in food produced to different standards and this development might not make front page news. Some participants referred to the horsemeat scandal of recent years – saying that if that could happen with our current system of food standards, how much worse could it be if we lowered them?

Furthermore, the fact that the food in restaurants and cafes wouldn’t be labelled and the customer would have no idea if they were eating hormone treated beef, for example, was also raised as an issue.

“It’s all very well thinking that something will be nice and labelled in the supermarket. It won’t be labelled when you go into your Wetherspoons, or you go into some posh French restaurant in London.”

Southern England

The handful of participants who supported bringing in food made to different standards said labelling would provide informed choice for consumers: a wider range of food and at a lower price point. Consumers could then make their own decisions about what they want to buy.

“I think if it’s accurately labelled then it does become a consumer choice. If it’s accurately labelled and we know exactly what’s in it, how it has been produced and where it has come from, then it becomes more of a consumer choice as to whether or not we want that product.”

Northern England

Nevertheless, most participants did not believe labelling was an effective way of managing food standards and quality for the long-term.

Role of price: short term savings vs long term costs

One of the main reasons discussed for importing food produced to different standards was price. Conversations about price in the workshops were at times animated, with participants seeing the strong attraction of lower priced food, particularly with the financial uncertainty unleashed by COVID-19. The discussions often circled back to whether importing lower cost food was an appropriate way of helping lower income households have a decent quality of life, if the products are made to lower standards:

“I would never want to compromise on food standards. I understand the issue of price and that some low income workers may struggle if the price increases as a result of these higher standards but I believe the government should then look at the minimum wage and compensate for this.”

South Wales

What is cheap versus what is value for money was discussed in some workshops. These discussions often included reflections on the wide range of choices available to us as consumers and that perhaps as a country we should pay more attention to quality and the more ethical aspects of consumer decisions.

“That it is actually a morality issue whether or not you choose to buy a product because it’s cheap, and you’re quite happy. Possibly understanding why it’s so cheap and those lives that affected from that, or do you choose the sustainable product, the fair trade product, which are probably going to be a bit more expensive.”

Northern England

As we have seen in the principles section, most participants who discussed price and producers were concerned that lower prices of imported food could cause harm both in the UK and in other trading nations - if not considered in the detail of trade deals – by:

- Impacting on health or safety of consumers
- Undercutting UK farmers and food producers
- Causing environmental harms
- Encouraging poor labour standards
- Undermining fair trade.

Other food related trade issues

The COVID-19 pandemic made participants far more aware of how the food system works in terms of supply chains and resilience as they saw shortages in pasta and flour caused by high demand and panic buying. This led to discussions on whether it is better to focus deals on achieving a diversity of supply or to invest more in being more self-sufficient, to help the UK maintain food supplies in a more uncertain world. Not surprisingly, participants did not come to a consensus on this. Those who advocated for a diversity of supply said that as we already import such a large percentage of the food we consume we should protect our imports through a wider set of trade deals giving more food security and price stability. The opposing view was that in future crises, the countries we trade with might ‘shut up shop’ and keep food for themselves and so it was important to ensure that the UK’s farming industry wasn’t decimated by trade deals.

Once participants had considered the protection of geographical designations as part of trade deals, particularly those in East Coast Scotland, they thought that food products both here (such as Scotch Whisky and Gin, and Aberdeen Angus beef) and products in other countries (such as Feta and parmesan), should be afforded protection. These products were associated with local traditions and quality produce, and that the removal of protections would be a threat to local industry and expertise.

Reflection on the power of consumer behaviour when buying goods

One of the reflections participants had during the discussions was the implications of buying more UK produced food and goods. This was seen as an ideal scenario by many participants. One motivation for doing so was the desire to support local businesses, with a recognition that the cost of local produce may be higher but that this was a trade-off they were willing to accept. Another motivation for this was the assumption that if consumers bought more UK produced goods, this would stimulate UK businesses to produce more. Some participants felt this would improve resilience as a nation to future shocks or breakdowns in supply chains, which some thought would be on the increase as climate change impacts global food production. A further motivation behind the desire to purchase more UK produced food and goods was to champion goods produced to the UK’s high standards. Participants were particularly keen to do this if new trade deals resulted in more imported goods made to lower or different standards to the existing UK regime.

Location specific summary: Food

Northern Ireland, Wales and Scotland

- **Protecting farming** from being undercut by the lower standards of production in other countries was a particularly strong plea in these three nations. Agriculture plays a bigger role here and they would feel the impact on farming more strongly than in England.
- This perception of not being involved or heard meant **Northern Ireland gave the greatest emphasis of all locations to transparency in trade deals** and clear communication about their impact.

Southern England

- **Diversity of food supply:** we heard more support in Southern England for trade deals enabling the UK to source a reliable and diverse range of food at stable prices from a range of countries.

South Wales and Northern England

- Whereas in South Wales and Northern England **self-sufficiency** was emphasised more, in terms of eating more seasonally to be less reliant on other countries and reduce our environmental impact.

Northern Ireland

- There was relief among most participants in Northern Ireland that they would be shielded from changes to food standards for the time being through the NI Protocol. But also some concerns that they would have less choice because suppliers wouldn't want to navigate the complexities how NI is different to rest of the UK.

Consumer Products

Section Summary

Participants thought about products largely through the lens of cars and toiletries, as prompted in the stimulus materials. Information shared with participants included the impact of tariffs, the complexity of supply chains and rules of origin and how standards can align and differ.

As with food, safety was the greatest concern for participants when thinking about product standards. They felt strongly that product safety – especially when it comes to vehicles and toiletries– should never be reduced through a trade deal. Where there is the potential for a product to cause more harm, participants do not want to see it on UK shelves or online.

Although participants wanted reasonable prices, they weren't prepared to sacrifice quality – they thought this would contribute to the wasteful attitude that some thought throw-away consumerism nurtures.

When it came to choice, some people felt we are already overwhelmed with options for goods in the UK. Others thought that choice was a good way to make sure everyone has access to products over a range of price points and that more choice could drive substandard products from the market.

How we talked about products in the workshops

Cars and toiletries were selected as an example for participants of how trade in goods works. By introducing trade for goods through these products, the dialogues were able to highlight some of the main issues intrinsic to the negotiation of goods in trade deals such as the potential harmonisation of standards across countries – whether that be reducing or increasing standards to match those of the trading partner – or exemplifying how prices consumers pay for goods could be lowered by the reduction of tariffs or simplifying custom processes. These goods also helped people to understand about the complexity of trade deals and importance of trade in components as well as finished goods. Products such as cars, cosmetics and toiletries are important, everyday items to most consumers. Therefore, participants had strong views on what trade deals should deliver for these products.

Participants were introduced to cars and trade during workshop 3 (see appendices) where they were shown a video which detailed how future trade deals could impact cars, which are the UKs biggest imported and exported goods. Participants were also given a car summary sheet (see appendices) in their packs providing further information on why trade deals matter when it comes to cars. After watching the video in their small groups, participants discussed what they thought were the most important trade implications for cars and why they are important. As a homework task following the workshop, participants watched a short video on trade and toiletries (see appendices), noting down the issues that they felt were most significant. The toiletries video showed Which?, the Cosmetic, Toiletry & Perfumery Association (CTPA), The European Consumer Organisation (BEUC) and the British Retail Consortium.

Participant questions on trade in products

How do we make sure what we import fits our strict policies/drug standards if we make a deal with the US?

What influence do big companies/brands have on trade deals?

Do we not need to consider how our imports are regulated both here and at point of manufacture more closely? That we won't lower our standards just to get a cheap deal?

Safety

The greatest priority for people around products and trade was safety. This was true for all five locations, relative to the importance placed on choice or price. Participants felt strongly that current UK standards should be maintained for cars and toiletries in future trade deals. After learning about how standards can differ across countries, they thought that any trade deals made should only improve standards and negotiators certainly shouldn't risk a reduction in the current standards the UK has. When it came to safety standards, this was something that participants felt should not be compromised for lower prices or more choice.

"I think most people want to buy cheaper cars. We all do, but at the cost of safety, I'm not quite sure about that."

East Coast Scotland

"They should only have a choice between varieties of products containing empirically tested and safe chemicals."

Northern Ireland

Participants in all five locations demonstrated their belief that a certain level of safety, or a "universal standard" should be assumed for any product in a UK trade deal, irrespective of the price. It was important to participants that people at every income level could purchase products with confidence. They wanted to know that products are safe to use regardless of whether they are the cheapest or most expensive product on the shelf. Some felt that it was the government's responsibility to protect consumers from harm.

"I'm very proud of how strict the UK standards and regulations are on chemicals that go into cosmetics. This protects us the consumers."

East Coast Scotland

"I just think, if we're going to reduce safety standards for cars and things, doesn't that just open the gateway for lower standards for other things, other goods, other things that are made? And that's not the way you want to go, really. You would like to think other countries will step up and improve their standards."

Northern England

Participants felt that trade deals have a particular obligation to deliver high safety standards for cars, because they have an obvious risk to society.

"For the safety of our families, whether a passenger or pedestrian have the right to know that cars on our streets comply with the higher safety standards that we currently have in the UK."

East Coast Scotland

Participants were particularly struck by the variance in UK and US safety standards for cars and cosmetics, and felt the US was more lax in its approach to consumer safety than the UK.

“I think it was surprising that the US and Australia, their safety standards are lower than ours, and I think that’s quite shocking really.”

East Coast Scotland

“I know there’s ingredients in their products, practices that I think a lot of people would have a problem with here, myself included.”

Southern England

When thinking about the prospect of changing standards, participants in South Wales reflected on how their consumer rights might be affected if standards were to change and how this would alter the relationship consumers have with currently trusted and highly regarded brands.

“If the standard of the goods is not what you expect or what you receive, then what do you do? It’s a loss of money, of confidence in their products. It would mean I wouldn’t buy anything else.”

South Wales

There was also a degree of optimism from participants in South Wales, that new trade deals could provide an opportunity for the UK to create new, higher standards and regulate industries such as the cosmetic industry. Several participants thought about where UK standards have promoted safety in other countries, such as the regulation on the use of bull bars on UK vehicles over safety concerns for pedestrians involved in collisions.

“With new trade deals we have an opportunity to ‘clean up our act’.”

South Wales

The evidence and managing risk

There were some areas related to the trade of goods where participants queried and sought further clarification on how current UK standards were set, the evidence and justification behind the standards and how that compared to other countries. These questions and clarification points were triggered by the small number of comparative examples of standards – primarily for the US, Australia, New Zealand and Japan – provided in the stimulus.

For the majority, high UK standards allow consumers the confidence to feel safe when choosing products but some contemplated whether standards here were too stringent, particularly when comparing the large number of banned chemicals in UK cosmetics against other countries where there are far fewer restrictions. It left some people wondering whether a middle-ground could be achieved if we were to accept a reasonable risk and trade-off some currently restricted chemicals.

“Current UK law bans 1600 chemicals. I would be interested to know the average figure across the world, ignoring this low figure of 10 [in the US].”

East Coast Scotland

This sense of scepticism was mirrored for some participants in car standards, leaving them questioning whether any changes allowed by a new trade deal would affect what cars were driven on UK roads.

“I’ve just looked at the Euro NCAP website which rates cars that are available by safety standards... and scrolled right to the bottom of the list to those that aren’t seen as very safe. They’re cars that are on our road anyway... I think we are worrying about something that is already out there and not really going to change very much.”

South Wales

From these suspicions, questions arose around the true impact of these lower standards in other countries and whether there was sufficient evidence that products were any less safe than those regulated to current UK standards.

“I would like to know, in different countries, that have lower standards, what their infection rates are like, or their disease rates, and death rates”

East Coast Scotland

One area where there was felt to be no uncertainty was animal welfare in cosmetics testing. For participants in East Coast Scotland and Southern England, there was a strong feeling that no amount of new evidence could alter their position on the ban on animal testing.

“I think one of the issues is animal testing personally, I just think there are plenty of companies that can make products that are used for day-to-day things, cosmetics, everything like that. If companies can make these products without having to test on animals then why are there places still doing it?”

Southern England

As participants thought about access to products, concerns were raised about the availability of items online that don’t conform to UK standards and the risks these bring to human health and the production standards they abide by.

“Whilst you won’t be able to buy them in the shop because they’re heavily regulated by this huge list of ingredients and things that they have to comply to, you can still buy them online... it’s frightening some of the crap that they’ve got in them, whether or not it’s dangerous to your skin or it’s harmful to the environment, and worse still, the whole test on animal debate.”

Northern England

To mitigate this risk of purchasing lower standard products online, or the reduction of standards in trade deals, participants in East Coast Scotland called for greater education and transparency for consumers when it comes to product standards.

“It’s high time we started really educating consumers in their homes through social media platforms, through TV stations, to let them know what exactly is prohibited from the country and why.”

East Coast Scotland

Cheaper prices, but at what cost?

When talking about price in the context of trade deals, lower prices achieved through deals with countries with an expertise in goods (e.g. car parts or clothes) were welcomed. Participants were receptive to trade deals resulting in a reduction in tariffs, lowering prices for consumers. This was based on the assumption that current UK standards would be maintained.

There was some concern that cheaper goods would mean a trade-off with quality and would encourage a ‘throw-away’, wasteful attitude amongst consumers with detrimental environmental consequences.

“You buy cheap you buy twice. That’s a false economy. This whole thing about making the economy better by reducing the cost of products coming into the UK, you’re going down a slippery slide. Are we looking to live in a country that will accept anything, and do anything, as long as we get a financial package? You have to look at what you can accept. The cost of things may go down but is that beneficial in the long run?”

Northern Ireland

With potentially greater choice of cars if the UK were to strike a trade deal with the US, some participants aligned an increase in choice with cheaper prices. With this in mind, participants were wary about the hidden long term costs of cheaper and possibly poorer standard vehicles.

“If that’s something which is less safe, that could potentially end up costing the NHS or road repairs or anything like that. So, although we’ve got 10% less on importing the cars, we have a higher cost somewhere else down the line.”

Southern England

“If we all choose to opt for cheaper cars and cause more road accidents, it actually as a knock-on effect on our whole economy and taxes. The safety impacts on cost as well, in the long run.”

Northern Ireland

For future deals, participants felt that there was an opportunity for consumers to access some items at a cheaper price. This was particularly true for products where there were no immediate safety concerns, or for gaming or entertainment products where standards aren’t an issue as the product remains largely the same across international boundaries – this was an exciting prospect.

“It’s such an interesting thing to hear because one of the number one things that stops people buying technology from America is these custom charges... I’m quite curious to see how much it [a]ffects the custom charges and things like that.”

East Coast Scotland

Location specific summary: Products

Northern England, South Wales, Northern Ireland and Southern England: Strongly want to maintain safety standards and wouldn’t want to sacrifice this for more choice. For some people in East Coast Scotland more choice would be beneficial, resulting in increasing competition, productivity and ensuring people of all income levels could access goods.

Northern England and South Wales: People in Northern England felt strongly that the manufacturing industry – in particular, car manufacturing – should be protected against job losses and should maintain UK standards.

Southern England: In Southern England, participants were less concerned about protecting the manufacturing industry but were more concerned about US standards and thought that standards and how they were certified needed to be independent.

Northern Ireland: People in Northern Ireland were concerned about their position in trade deals due to their unique position outside of mainland UK and how this would affect the price and variety of goods.

South Wales: An opportunity for the UK to develop new higher standards and promote these standards overseas.

Digital trade

Section Summary

Few disagreed with the UK Government's objectives for digital trade to make the trade of goods and the transfer of services easier, and participants could see the opportunities for big business and the economy more widely, and for digital trade to facilitate more environmentally friendly commerce. But generally, there was some difficulty in seeing the additional and direct benefits of freer data flows that enable smoother digital trade for individual consumers.

Two specific areas of digital trade were the focus of discussions: consumer data protection standards and online consumer rights. Most people had increased their online consumer activity as a result of the COVID-19 pandemic and could engage with these two issues well.

There were particular concerns about UK negotiators giving too many concessions to the USA on data protection standards and online consumer rights as these were perceived to be relatively weak state-side.

While some participants said they could live with some compromises on data protection standards, the majority view was that a weakening of an already imperfect GDPR regime would remove the necessary minimum protections consumers need against hidden and growing online harms. There was broad agreement that Governments have a duty to agree specific regimes to protect consumers, and that these matters cannot be left to global tech companies to decide on. In terms of which standards should be agreed, the majority felt UK negotiators should aim to maintain existing data protection standards and rights, and if possible, to improve on them where they are weak.

Participant questions on digital trade

If the UK is negotiating to open Japanese telecoms markets to UK companies, what can the UK provide that Japan does not have access to already?

The digital platforms will open us to more choices from world trading but what would the cost be in terms of data protection?

What will replace GDPR? Will we adopt it into UK law?

Consumer focus on digital trade

For the reflective homework task following workshop 3, we asked participants to watch a video about the growing importance within modern trade agreements of digital trade, and asked for their thoughts on what stood out for them. The same video was shown in all five locations featuring Which?, various experts from The Department for Digital, Culture, Media and Sport (DCMS), and experts from the Open Rights Group.

Participants were also given a hard copy summary sheet (see appendices) in their work packs that outlined: government ambitions for digital trade, the volume of digital communications being made daily in the UK, UK data privacy through the use of GDPR and the differences in consumer protection between countries. The sheet posed the question about key trade-offs in this area: Do we reduce our regulations in order to trade digitally with countries with lower standards, possibly resulting in a risk of lower safe guards?

During workshop 4, we revisited a shorter version of the digital trade video as a refresh before discussing more fully how participants felt the issues raised would impact on trade deals and them.

The new oil

Many of the participants had not previously thought very much about the potential benefits trade deals could provide to them when it comes to digital trade and within that, digital services. However, they agreed that opportunities to enable easier transfer of services, the easier trading of goods, and opportunities to widen access to goods and services online would be objectives worth pursuing by the Government as they appear to play to our strengths of exporting services. It would also help to cut down on environmental impacts of trade through electronic record keeping/supply chain management - and therefore will greatly benefit the economy and wider sustainability goals. One or two people were also excited at the possibility of sharing data between countries for research and development (R&D) leading to product or service innovation and international collaborations.

Nevertheless, much of the conversation around digital trade focused on two specific consumer areas that really struck a chord with participants: (i) the protections of consumer data transferred across borders and (ii) consumers' rights relating to online (and therefore cross border) shopping and online services.

This particular focus dominated deliberations because almost everyone recognised the trends of increased consumption of services online and of the growing popularity of internet enabled devices and apps which results in more sharing of data with businesses. These trends had been intensified by the COVID-19 pandemic which coincided with the research fieldwork period, affecting everyone who took part in the research.

“It’s always a concern when providing your information anywhere, who could possibly get their hands on it so to have more protection built into any deals would be so beneficial, especially as we pretty much live our lives online now.”

South Wales

While people had low awareness of the full spectrum of ways in which data is collected about them, and how that data may affect their consumer lives, they were acutely aware it is valuable to businesses across the globe. References were made to data as the new gold or the new oil. Furthermore, participants largely focused on data protections and online consumer rights because for the first time, some of them had only realised how much weaker standards are in other countries, particularly in the USA – as the following quote from East Coast Scotland illustrates:

“I’m concerned to learn that the privacy protection is virtually non-existent in the USA and that, for me, would present major, major problems in the long-term. We, as a country, in the UK, have the complete opposite of that.”

With opportunity and widening access, come unknowable risks

A few individuals across the locations expressed excitement at the prospect of personally gaining wider access to digital services or goods online through new trade deals. Entertainment and arts were the main areas mentioned where new choices could be enjoyed (online gaming, streaming US TV shows, and specific cultural products like Japanese anime/Manga). But for most, they could not see any immediate direct benefits, or felt they had plenty of access to digital services and goods online already:

“I’d need some examples, I’d need to be sold. I want to know what can’t we get already within our remit. What else is out there?”

South Wales

“I’m quite happy with the access of things that we have. I think we already have a huge access to products and services. It [data protection] wouldn’t be something I would be happy about giving in on, personally.”

East Coast Scotland

Many participants were quite cautious about unconditionally pursuing more free flowing data as part of new free trade agreements. As such, participants debated just how hard or soft the UK negotiators’ approach to a trade deal should be when it comes to increased data flows given online scams are already so widespread (heightened by criminals taking advantage of the coronavirus lockdown) and that, under GDPR, it is still difficult for even the savviest of consumers to control their data and exert their subject rights. Additionally, it was difficult to make a fair assessment weighing up quite intangible benefits of even more free flowing data (e.g. more innovation) versus equally intangible personal risks (e.g. being profiled and manipulated).

At this point, it is worth noting some minority views expressed during the deliberations about digital trade:

- The first is ‘the horse has bolted’ when it comes to consumer data being shared across borders or that increasing data flows are not going to make much difference because ‘we can shop on Amazon.com anyway’. With this view comes the opinion that it may not be good use of time and energy for UK negotiators to fight for more robust consumer protections in what could be seen as a losing battle with a more powerful country like the USA.
- Another minority view, also seen in previous Which? research on consumer data, is that of data liberals, characterised by ‘if you have nothing to hide, then what can be the problem with more consumer information being shared across borders?’.
- The final type of minority view is characterised by participants wanting to let negotiators get on with it, and to have faith that the UK already has arrangements in place to share data with other countries outside the EU, even though these are infrequently reported (such as the Philippines and India).

How do data flows work and can we trust companies especially Big Tech to do the right thing?

There was confusion over how personal consumer data is shared and how it is being used by companies and across borders. People knew it happened but had few details. Aside from the data liberals for whom anything goes, there was a sense that beyond a grudging acceptance of targeted advertising based on purchase data or internet browsing, serious concerns existed around the freer flow of consumer data including more personal information for other types of targeting or profiling.

Voter manipulation on social media platforms was mentioned in this context across our research locations. Some technology companies were also discussed, perceived by some to be sharing consumer data with their Governments for surveillance purposes. These media stories shared among participants about the potential or perceived misuse of consumer data points to a seemingly glaring cultural difference between the way consumer data policy and protections is dealt with in other countries, such as China and the USA, and the way it is done in the UK. The USA was particularly characterised by Government policies being subject to influence by corporate lobbies, allowing them to be freer with consumer data and make it harder for consumers to hold them to account.

“We have allowed ourselves to be at the mercy of incredibly powerful companies and lobbies, whose interests will win over those of the consumer... The starting point in negotiations should be what will have most benefit for citizens, not what will attract the biggest companies.”

South Wales

The dramatic examples of voter manipulation and mass population surveillance by Government sponsored technology companies aside, participants simply did not like the idea of increasing the potential for their personal data and profiles to be used to target them in more everyday ways such as aggressive marketing. Additionally, they saw the level of cold calling and cyber scams as being too high under GDPR.

Participants felt that it was desirable to come to some sort of agreement with the USA on data protection as it is just not culturally acceptable to let Big Tech influence trade deals at the expense of consumers' rights and protections. The degree to which we meet the USA in the middle is discussed below, but it was recognised that going too much away from GDPR would not only remove rights from consumers but could put our relationship with the EU at risk.

Online platforms and online shopping

During the pandemic, more and more people had come to rely on the internet and ordering goods and services online. Many had assumed the same level of protection buying online from sellers outside the UK/EU as they would if they were to go into a shop and buy a product or service.

The USA was a particular focus for discussion around online platforms and shopping, partly because the video stimulus presented during workshop 2 showed that the USA's negotiation objectives included: the UK to agree not to impose any taxes or tariffs on US digital products and the UK not to legislate to make online marketplaces liable for their sellers content (e.g.. safety of products or reliability of information and reviews). Additionally, the focus was on the USA partly because of people's own experience, with some participants expressing concern that US websites such as Amazon.com offer lesser consumer protections than Amazon.co.uk. There were similar but fewer discussions about Chinese platforms selling cheap low quality products which some participants felt needed to be monitored more closely too.

Despite a minority view that it is not feasible for online platforms to monitor all content and all sellers, the balance of opinion was that big companies have a responsibility to protect consumers which in turn would increase consumer confidence and a sense of security, and this should be reinforced through trade deals.

“The one that disturbed me was giving big corporations like Amazon and eBay a licence to shirk their responsibility for what's being sold on their websites. It's very American, power to the corporations. I wouldn't be happy with that.”

South Wales

Mission impossible: A middle ground on data protection standards?

As we have indicated above, participants clearly could see the broad economic upsides of increasing digital trade. Indeed, in Northern Ireland, there was an oft-repeated view that digitising trade paperwork could be immensely helpful in softening the border between the North and the South of the island, making commerce quicker and seamless.

Some participants asked whether or not it is possible to be selective about what data crosses borders. There was a suggestion that generic and anonymised data could be shared but nothing else. Another suggestion was to allow the transfer of different types of consumer data into different countries depending on how stringent their data standards are. This shows the extent to which consumers have difficulty getting to grips with data flows.

At some points in the deliberation it felt like more people were willing, as a last resort, to trade away data protections and online rights than, say, food standards. This seeming willingness is

partly because the harm and risks to the consumer of weakening data standards are often hidden. However, it is clear that even though some participants said they wanted to find some sort of compromise with countries with more liberal data laws, most actually felt that watering down an already imperfect GDPR regime would be disastrous for consumers. Indeed, some were terrified about diluting standards as they felt vulnerable to the fast changing digital world and needed to know there were minimum protections in place that would protect them now and in the future from things like hacking and scams.

“Unlike food or toiletries, where you can educate yourself and vote with your purchasing power to make a choice, it appears to me that whatever deal is done with regards to data, we are just at the mercy of it and we have no control over our data, depending on what agreement is in place because we just won’t have the knowledge.”

Northern Ireland

Whilst very few knew the details of GDPR or had the wherewithal and time required to exert their enhanced data subject rights under GDPR, they were reassured they could use GDPR to aid redress. Some pointed to the deal with Japan, agreed in principle during the fieldwork period, and questioned why we should accept lower protections with the USA if we were able to maintain existing protections as part of a deal with Japan, and potentially Australia too.

“I am very concerned about data privacy and data ending up in countries with lower data regulation legislation. I feel it is already a lost battle and would want to see decisive action, including discussions in trade deals, about improving data security for citizens.”

East Coast Scotland

It was also suggested that businesses in the UK, who had prepared and done so much to comply with GDPR, could now face pressures from companies who have not invested in data protection if standards are lowered. This felt like unfair competition and another reason to try to maintain the standards we currently have.

In some cases, participants argued that trade deals should go beyond GDPR to update and address existing gaps within the regulation and perhaps learn from ‘better practice’ elsewhere in the world. But they were not able to articulate what that would look like or how feasible that would be.

There was no consensus on the degree of alignment between trading countries but as the chapter on priorities indicates, it was felt important enough in at least two out of three groups per location that negotiators should aim to maintain the UK’s existing standards in this area:

“It should be easier to trade goods and services as well as having easier accessibility, but it has to be at the right price.”

South Wales

The nagging worry for a number of participants – particularly those who thought the UK is not in a good bargaining position with the USA – is that we would have to seek a compromise on data rights and protections in order to agree some sort of trade deal.

Transparency

Irrespective of what UK trade negotiators finally agree on the flow of data across borders, the participants wanted to have more easily understandable information for themselves and for less savvy internet users, about both:

- **Consumer data protections** – there is a lack of transparency on the international trading and application of data and how this affects consumers, which in turn affects accountability for consumer protection. Consumers need to know in layman’s terms what the agreed protections are, what rights they have to their data and what redress they have when things go wrong. For instance – what exactly will replace GDPR, what will be adopted into UK law and will that law be the basis of trade agreements with other countries or not?

“If a big US company has your information, are we allowed access to that and what information they hold on us?”

North East England

- **Online consumer rights** – similarly, participants wanted clarity on what protections will be in place so people cannot be sold faulty or unsafe items and what redress they have. Many of our participants mentioned examples of online marketplace scams and wanted reassurance of specific protections in place to stop this increasing. It is natural to be attracted to the choices opened up by digital platforms trading from around the world but there is nervousness around the cost of this in terms of weaker or less defined online rights and protections.

“I think consumers should be aware what rights you have with another country. Would they be the same rights in Europe as USA? Would the rights be lowered?”

East Coast Scotland

There was one **location specific** finding on digital trade: In Northern Ireland, there was an appreciation that digitising trade paperwork could be immensely helpful in softening the border between the North and the South of the island, making commerce quicker and seamless.

Conclusions

The public dialogue commissioned by Which?, co-designed with Hopkins Van Mil, revealed important conclusions for consideration by those negotiating UK trade deals. They include the need to respect fundamental issues such as consumer trust and not to undermine this with an over-simplification of the consumer view. Conclusions from the deliberative process are summarised in this section.

- The National Trade Conversation demonstrates that **the UK consumer is a complex individual with a range of perspectives. It is inadequate to assume a simplistic view of the consumer, who is entirely focused on choice and price.** Consumers are affected by every aspect of the trade deals under negotiation. Their priorities take into account choice and price, but in the context of how these choices affect the environment, health, employment and fair trade.
- **Consumers need to trust that any products or services they buy have health and safety standards in place,** so that they don't have to take time and energy in scrutinising everything they buy.
- **The current regulatory framework is seen as part of the UK's reputation for quality products and services** and in line with our national characteristics of striving for high standards. Participants asked for the trade negotiations to build on this strong regulatory platform and for it to evolve over time as the UK makes new, tailor made, trade relationships.
- Of paramount importance to many in the dialogues was for the **UK government to apply a long term view to its trade negotiations and avoid quickly negotiated trade deals which have short-term gains, but longer-term harms for the health of the nation and the planet.**
- **The environment was seen time and time again by participants as a fundamental plank of any trade deal.** Participants saw the strong link between trade and the environment and wanted UK trade deals to help deliver the UK's net zero 2050 climate change targets.
- With the UK now negotiating its own trade deals, **consumers expect government to involve them through clear communication about what could change and the evidence and expertise guiding our negotiating goals.**

Thanks and Acknowledgements

The success of the National Trade Conversation is a result of the kind contributions of many individuals and organisations who kindly gave up their time for the project. We are incredibly grateful to all those who contributed, especially given the majority of the project took place with the COVID-19 lockdown restrictions in place. Firstly, we would like to thank the 97 participants who gave up their time to take part in the National Trade Conversation. It was their commitment and enthusiasm that made the project so engaging and thoughtful.

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- Professor Tim Benton, Research Director in Energy, Environment and Resources, Chatham House
- Sir John Curtice, Senior Research Fellow at NatGen, Professor of Politics at Strathclyde University
- Miranda Dawkins, Deputy Director, Cross-Cutting Policy, Department for International Trade
- Jonathan Brenton, Head of Trade Policy (Non-EU), Confederation of British Industry (CBI)
- Andrew Opie, Director of Food and Sustainability, British Retail Consortium (BRC)
- Nick von Westenholtz, Director of EU Exit and International Trade, National Farmers Union (NFU)

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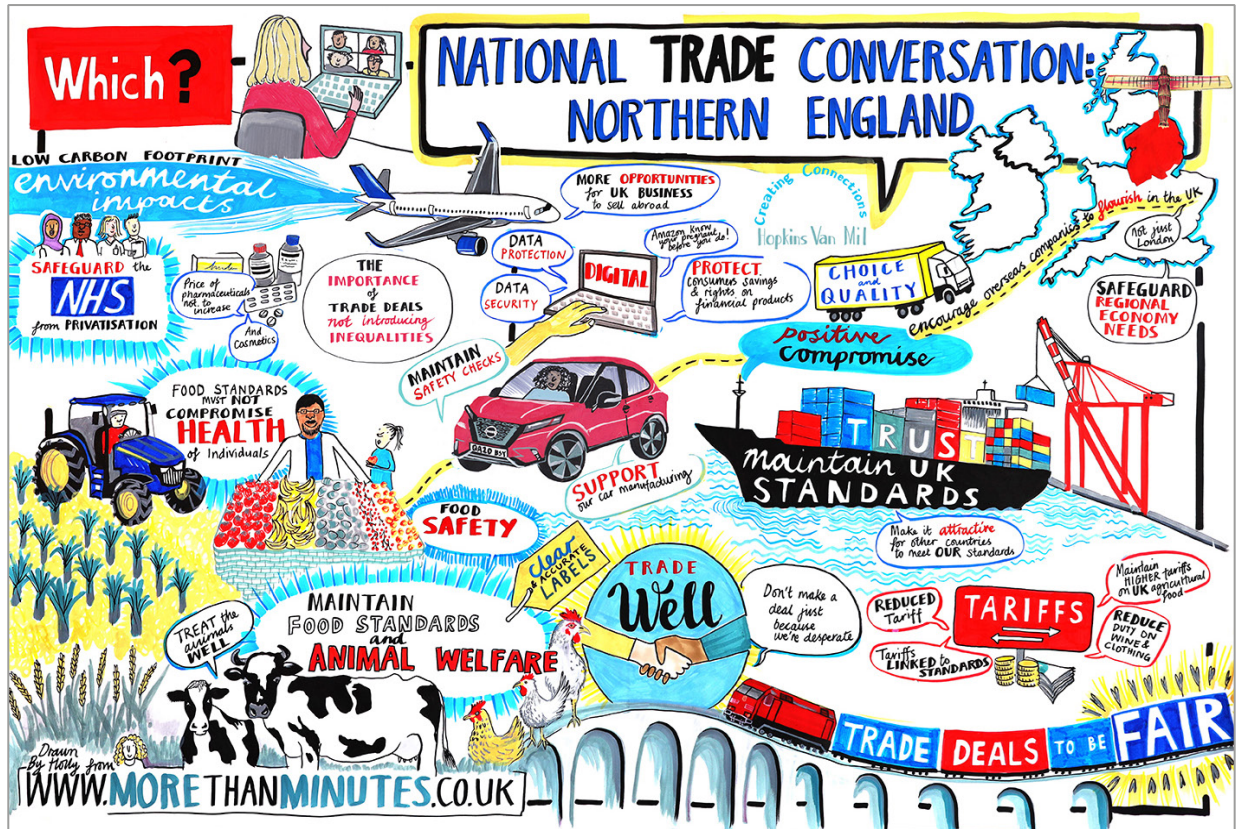
- William Bain, Policy Advisor – British Retail Consortium
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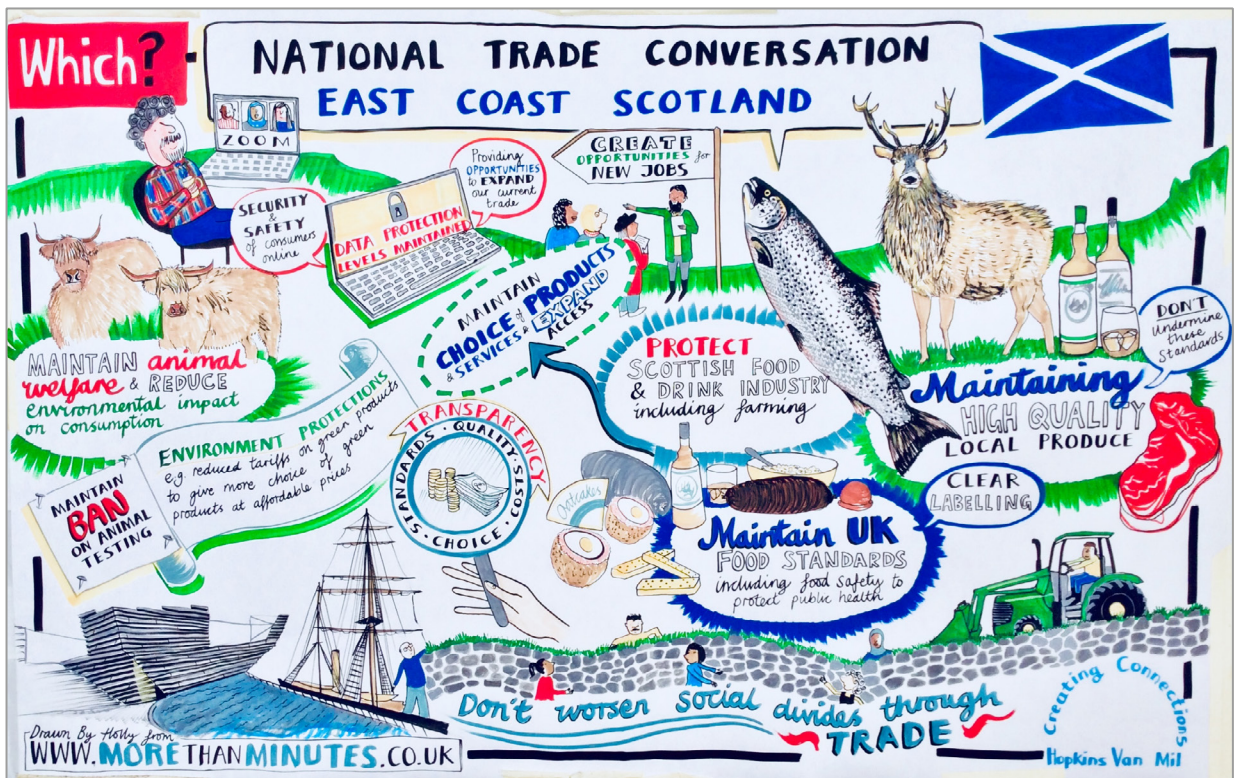
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The public dialogue would not have been possible without the participants who shared their experiences and views so generously. We are very grateful to all of them.

Visual minutes

When we decided to move the National Trade Conversation online due to the COVID-19 pandemic, we also decided to commission some visual minutes of the events. These illustrate the main themes that came out of the discussions in each of our five locations. Larger copies of the images can be found in the appendices.







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