Trade War or Election Interference?

Ryan Brutger, Stephen Chaudoin, and Max Kagan

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Abstract

In response to the Trump trade war, many countries enacted politically targeted trade retaliation (PTTR) against swing states and Republican strongholds. We argue PTTR increases public concerns about foreign election interference and test the effects of such retaliation across partisan affiliations. We test our predictions using a national survey experiment in the United States fielded before the 2020 election. In contrast to findings about sanctions and foreign endorsements, we find strong evidence that PTTR increases fears of election interference among both Republicans and Democrats. We also test whether different targeting mechanisms generate a backlash against the foreign retaliator. When the incumbent's base is targeted, attitudes towards the retaliating state worsen, but the same is not true when swing states are targeted. As a whole, the evidence shows that economic policies which are not primarily intended to influence elections may nevertheless come to be viewed by the public as foreign election interference.

1 Introduction

The trade war initiated by Donald Trump was one of the largest shocks to the international economic system since the Great Recession. The trade war began with the United States imposing tariffs on washing machines and dishwashers from Asian countries and quickly escalated and expanded to myriad products and countries, as the United States and its trading partners exchanged repeated rounds of retaliatory tariffs.

Apart from its magnitude, a central feature of the trade war was how tariff targets were chosen for explicitly *political* reasons. Retaliation against the United States targeted products produced in specific locations with the intention of maximizing political pain for President Trump and the Republican party. Some salvos in the trade war targeted Trump's base of support in conservative states. For example, retaliation heavily targeted agricultural products, like soybeans, that are produced in pro-Trump strongholds.[1] Other shots in the trade war targeted contested swing states that were viewed as pivotal for Trump's re-election bid. Retaliatory tariffs against the United States were particularly painful for exports produced in battleground states like Michigan and Wisconsin.[2] Retaliation also took a personal turn against Republican allies of the President, with tariffs targeting production in the home districts of Speaker of the House Paul Ryan and Senate Majority Leader Mitch McConnell.[3]

While the Trump trade war provides the biggest and most recent example of politically-targeted trade retaliation (PTTR), this phenomenon is not new. The European Union (EU) incorporates political calculations in its internal rubric for choosing retaliation targets, balancing political leverage against domestic economic costs.[4] When the George W. Bush administration proposed steel safeguard measures in 2002, the EU effectively deployed politically targeted trade retaliation against exports from electorally competitive U.S. states.[5] Even though many other countries' electoral sys-

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[1]Chyzh and Urbatsch (2021)

[2]Fajgelbaum et al. (2020); Blanchard, Bown and Chor (2019)

[3]https://www.scmp.com/news/china/diplomacy-defence/article/2140464/how-china-hit-donald-trumps-supporters-where-it-hurts. Accessed 12-12-2020.

[4]Fetzer and Schwarz (2020)

[5]Chaudoin (2014)

tems do not create such clear geographic concentrations of base or swing voters, trade retaliation frequently focuses on other political pressure points. The United States often targets politically influential exporters of luxury or specialty goods, such as Stilton cheese in the United Kingdom or the French wine industry.[6] During the "Banana Wars" of the 1990s, the United States threatened the European Union with rotating "carousel sanctions" against politically salient industries in an attempt to maximize political leverage. More recently, the United States also targeted European agricultural producers as part of the long-running dispute between Boeing and Airbus, reasoning that Europe would "respond more quickly if farmers and agricultural producers complain that they are collateral damage in a trade fight that has nothing to do with them."[7] China also recently targeted the politically-powerful Australian wine and coal industries in a row over imports of 5G technology and a proposed inquiry into the origins of the COVID-19 virus.[8]

Academic research generally applies a political-economic lens to analyzing the effects of trade policy. Those helped by a particular trade policy are more likely to support the incumbent responsible for that policy; those harmed are less likely to support him or her.[9] But trade policy—and its political motivations—now take place in front of audiences that are increasingly aware of foreign interference in domestic elections.[10] In the U.S. case, politically-targeted trade retaliation affects a public that is increasingly aware of threats of election interference, especially in the aftermath of public debates over Russian electoral interference during the 2016 Presidential election. Foreign election interference is likely to remain an important feature of relations between states, because it is difficult to counter and can level the playing field between asymmetric adversaries. Broader scholarly attention to electoral interference is much-needed, because election interference can contribute to political polarization and undermine trust in elections and in democracy. Furthermore, foreign election interference can also produce a strong backlash against interfering states, which

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[6]https://nymag.com/intelligencer/2019/09/trumps-cheese-tariffs-may-be-his-most-normal-trade-policy.html. Accessed 12-12-2020.

[7]Ana Swanson, "How Trump Just Made Your Dinner More Expensive," *New York Times* 10-3-19, https://www.nytimes.com/2019/10/03/business/trump-tariffs.html.

[8]https://theconversation.com/its-hard-to-tell-why-china-is-targeting-australian-wine-there-are-two-possibilities-144734.

[9]e.g., Kim and Margalit (2021)

[10]Tomz and Weeks (2020) and Bush and Prather (2020).

can strain and destabilize international relations.

We therefore widen the aperture of election interference to include politically-targeted trade retaliation (PTTR). Trade policy and the political machinations behind may once have flown under the radar but increasing sensitivity to electoral interference means that the distinction between trade policy and political interference has become blurred. Politically-targeted trade policies are designed to inflict economic harms on certain members of the public, fueling retrospective punishment of incumbent candidates. We argue that awareness of this politically-targeted nature of trade retaliation can affect public attitudes in ways that go beyond direct economic pocketbook effects of trade policy and encompass reactions similar to those found in response to more direct and overt instances of electoral interference. These include increased worries about election interference and a backlash against the foreign state which imposed tariffs. We theoretically distinguish between two types of PTTR—base targeting and swing-state targeting—-which can trigger different reactions among subsets of the electorate. Research on the consequences of electoral interference has focused most heavily on policies targeting the incumbents' base of support, but efforts to target politically pivotal subsets of the electorate are also gaining prominence.

We first document how PTTR was not an esoteric or unknown feature of the trade war pondered only by academics and elites. A significant proportion of media coverage about the trade war focused on its electoral implications. In our survey of media coverage of the trade war, we find that over 30 percent of US newspaper stories covering the trade war specifically mentioned that swing states or Republican strongholds were targeted or disproportionately affected by retaliatory tariffs. After the trade war began in 2018, the media provided extensive coverage of PTTR in its content about the trade war.

We then use a survey experiment fielded to US respondents in the weeks before the 2020 presidential election to assess how different types of politically-targeted trade retaliation affect perceptions of electoral interference and perceptions of the foreign initiator of the targeting. To make the treatments more realistic, we use similar language to that found in our survey of media reports. Our survey design isolates the effect of the political targeting of retaliation, not merely the

effect of retaliation. By comparing treatments that mention retaliation with and without its political dimensions, we can show that negative reactions to PTTR stem from its political motivations, not simply from the presence of economic statecraft. We find a strong effect of political targeting on public concern that the foreign actor was trying to interfere in the US election. Politically targeted retaliation—either targeting Trump's base or electoral swing states—increases the number of respondents concerned about election interference by 13 percent, compared to respondents who read about untargeted retaliation.

Notably, both Democrats and Republicans shared this reaction, even though the targeting was only intended to harm President Trump or the Republican base. This is in contrast with most existing research which finds that respondents react most negatively to targeting of their co-partisans and care much less about targeting or endorsements directed at the opposing party. Existing research finds that respondents have an "enemy of my enemy" attitude towards biased foreign interventions.[11] By contrast, we find that Republicans and Democrats reacted similarly to learning that trade retaliation had targeted states that Trump carried in the 2016 election. We do find partisan differences in the intensity of the reaction to swing state targeting. While Democrats did react negatively to swing state targeting against President Trump, Republicans reacted more strongly to this treatment. These findings allow us to speak to competing mechanisms in the literature, lending support to electoral theories which emphasize public concerns that foreign interference could affect election results as opposed to economic theories which emphasize the direct adverse economic consequences of politically-targeted trade-retaliation on co-partisans.

Our findings are important because they show how policies that do not directly manipulate an election may nonetheless be viewed as electoral interference. Given the public's growing distrust of democratic processes and the importance of foreign interference in domestic elections, it is critical that we understand how the public perceives politically targeted trade retaliation. Our results show that the public views PTTR as a form of electoral interference, which suggests the overall effects of a trade war extend beyond the direct economic pain and subsequent change in political behavior

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[11]Tomz and Weeks (2020); Bush and Prather (2020)

among the targeted. Politically-targeted trade wars can bring similar backlashes as direct electoral interference and increase concerns about foreign interference in domestic elections.

2   Background on Politically Targeted Trade Retaliation

Politically targeted trade retaliation was a prominent feature of the Trump trade war and many other trade spats. After Trump imposed tariffs on imports from the European Union, China, and many other countries, retaliation was swift. A consistent theme of the retaliatory tariffs was how they were politically targeted. Countries often retaliated by targeting geographic areas that formed the base of President Trump's 2016 electoral support. Virtually every country targeted by Trump's Section 232 tariffs retaliated against agricultural goods produced in states and counties that Trump carried handily in the 2016 elections.[12] For example, the EU retaliated with 25% tariffs against corn, rice, and peanuts, produced in states like Iowa, Arkansas, and Georgia respectively.[13] Chinese retaliation included tariffs on soybeans, which are produced heavily in rural, agricultural areas in the upper Midwest that went heavily for Trump in 2016. This feature did not go unnoticed by media observers, with the Guardian publishing the headline "Chinese retaliatory tariffs aim to hit Trump in his electoral base."[14]

Other prongs of retaliation against Trump's tariffs targeted goods produced in electorally competitive areas or "swing states." Those countries selecting targets for trade retaliation hoped that the economic consequences of the trade war would translate into political pain for the principals on the other side of the trade war. For an opponent facing re-election, such as Donald Trump in 2020, political pain for voters in swing states could translate most directly into electoral losses. Since many agriculture products originate from regions within swing states, many products from these regions also found themselves in the crosshairs. The BBC (2018) noted in their reporting that

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[12]Congressional Research Services. "Retaliatory Tariffs and US Agriculture." 2019. `https://fas.org/sg`
`p/crs/misc/R45903.pdf`. Accessed 1-5-2021.

[13]While Georgia ended up switching from Trump to Biden, it was not viewed among the most likely swing states in 2017.

[14]The Guardian (2018).

the EU chose to retaliate against orange juice, specifically mentioning that it "is a major export of Florida—a key US swing state." A Deutsche Bank report emphasized that the Chinese "retaliation has been on agricultural producers and agriculture products, which happen to be in swing states."[15] Some of the states that bore the brunt of retaliatory tariffs included pivotal swing states like Ohio, Michigan, Wisconsin, and New Hampshire.

To be sure, countries balance economic concerns with political leverage in choosing retaliation targets. Apart from maximizing political leverage, countries also want to minimize pain for their domestic industries and consumers and avoid supply chain disruptions at critical junctures. One former U.S. trade official described a "yuppie list" that U.S. trade negotiators used in negotiations with the EU. These list of targeted products included expensive consumer products like Perrier sparkling water and Roquefort cheese that would harm important European industries without increasing costs on staple products purchased by Americans. As described by this official, U.S. trade negotiators reasoned that the domestic costs would be limited to affluent American consumers, while the politically-influential owners of Perrier and the French cheese lobby would pressure the European Union to resolve the dispute.[16] Retaliating countries thus seek to balance competing concerns when choosing which bullets to fire in a trade war.

Media Coverage

A related, striking feature of the Trump trade war was that the political motivations behind trade retaliation featured heavily in US media coverage of the trade war. The prevalence of PTTR in the media is significant, since the media plays a critical role in influencing public attitudes toward foreign policy and shaping the information environment for voters.[17] There are competing theories about how the media selects news coverage, ranging from the media functioning as "a discrete strategic actor" that plays an independent role in shaping media coverage to those who argue

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[15]Report cited in Marcellus (2020).

[16]Author interview, 2021; see also https://www.latimes.com/archives/la-xpm-1987-01-30-mn-1748-story.html

[17]Baum and Potter (2008); Druckman (2005)

that the media primarily functions as a passive transmitter of elite views.[18] When it comes to media coverage of international trade and investment, the media tends to report on events that negatively affect the home country.[19] Retaliation during the trade war was no exception, and content emphasizing political targeting made up a significant portion of media coverage.

While we have mentioned anecdotes of media coverage above, we can also systematically analyze media coverage to show that the political motivations behind retaliation received significant coverage. To assess the prevalence of stories reporting on the political targeting of tariff retaliation, we used Nexis Uni to search for newspaper stories and cable news coverage in the United States that discussed the trade war. To ensure broad coverage of US media, we conducted two separate searches, with the search dates and parameters detailed in Appendix B. The first search queried all US newspapers for articles that mentioned trade, retaliation, and tariffs. We then coded whether the story specifically mentioned that certain states, politicians, or political parties were targeted. This sample included some major national newspapers, but also included many local and regional newspapers, such as *The Citizens' Voice* of Wilkes-Barre, Pennsylvania and *The Daily Iowan* from Iowa City, Iowa. The search found more than 3,500 results, from which we coded a sub-sample.

Table 1 shows examples from a variety of news outlets. We chose examples of coverage for both major sources of retaliation, the EU and China, for both types of retaliation, base and swing. We also chose examples from national coverage; it was not only local outlets that emphasized political targeting of certain states and regions. The examples show the directness and prominence with which outlets covered political motivations. At the bottom, we also reproduced one of President Trump's tweets on the subject, where he directly linked retaliation to political targeting of his base. That tweet itself even triggered additional coverage, as outlets like *Business Insider* amplified his message.

The results of the media analysis are displayed in Figure 1. Of the coded sample, 31 percent specifically mentioned base and/or swing state targeting, and four percent mentioned both swing

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[18]Baum and Potter (2008, 40), Bennett (1990).
[19]Brutger and Strezhnev (2018) and Guisinger (2017).

and base targeting.[20] Our second search focused on US newspapers and cable news transcripts with the broadest audience and yielded roughly similar results.[21] Of the sample coded from the second query, 36 percent specifically mentioned base and/or swing state targeting, and 11 percent mentioned both swing and base targeting.[22] Given that about a third of stories on the trade war in our sample specifically mentioned PTTR, the political aspects of the retaliation were well publicized to the mass public, with headlines noting things like "Beijing vows to retaliate in kind and has singled out products to maximize political pressure."[23]
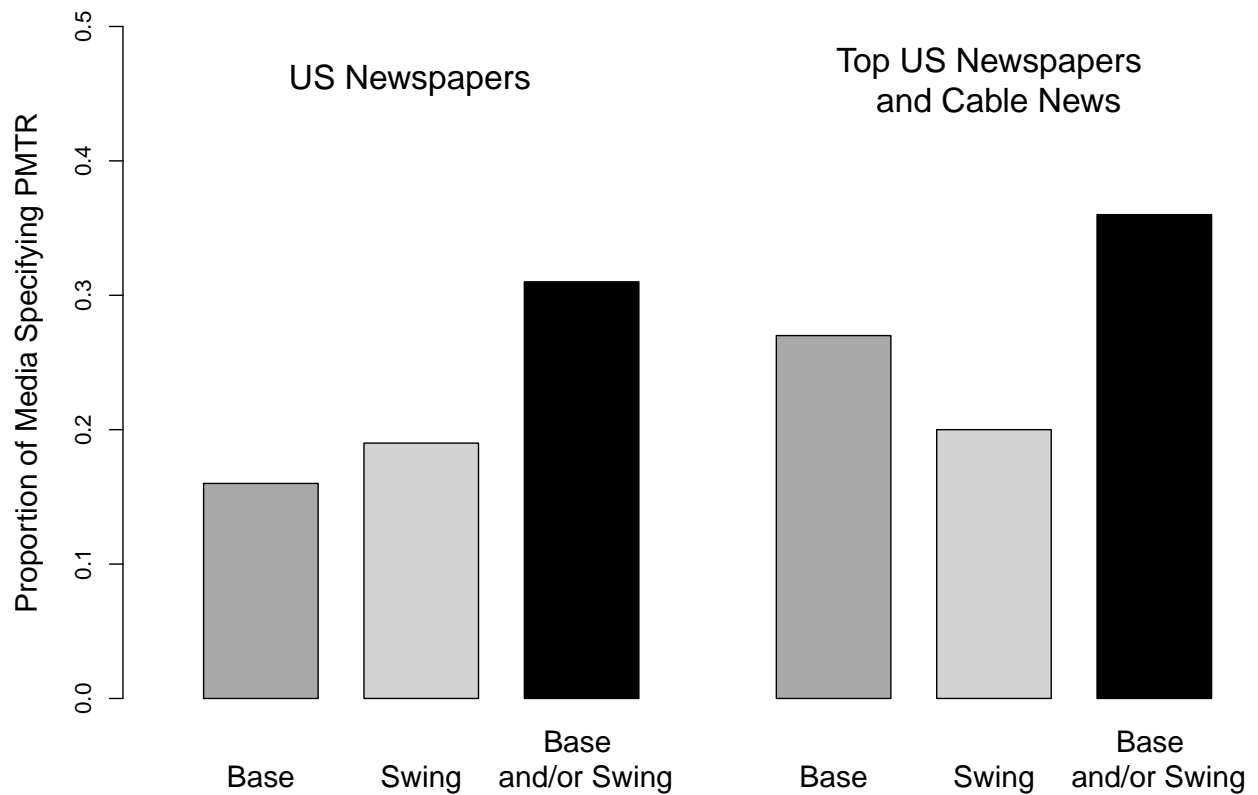
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[20]Twelve percent exclusively mentioned base state targeting and 15 percent exclusively mentioned swing state targeting.

[21]The specific sources are detailed in Appendix B.

[22]Sixteen percent exclusively mentioned base state targeting and nine percent exclusively mentioned swing state targeting.

[23]Times (N.d.).

Figure 1: Media Coverage Specifying PTTR

The figure shows the the proportion of media sources that specifically mention that retaliatory tariffs targeted or specifically affected base or swing states. The left portion of the figure presents results for US newspapers searchable with Nexis Uni and the right portion presents results for a sub-sample of the largest U.S. newspapers and cable news networks. Full details of the coding is in Appendix B.

Table 1: Example headlines and quotes from media coverage

	Base	Swing
European Union	The European Union fought back on Friday against the Trump administration's tariffs, slapping penalties on an array of American products that target the president's political base, like bourbon, motorcycles and orange juice. *New York Times*, June 21, 2018	"The [EU's retaliation] choices are not random, especially given upcoming midterm elections in the US ... Matthew Oxenford, a researcher on transatlantic economic relations at the London-based Chatham House, told me. "That's very consciously being done with an eye towards influencing a particular political player. Florida oranges is another thing because Florida is always a close state in US elections." *The Atlantic*, March 9, 2018
China	China is preparing to hit back at trade offensives from Washington with tariffs aimed at President Donald Trump's support base, including levies targeting US agricultural exports from Farm Belt states, according to people familiar with the matter. *Wall Street Journal*, March 21, 2018	The damage is likely to have political consequences, as the retaliatory tariffs target industries in swing states. Wisconsin produces more than 90% of America's ginseng, and 95% of that comes from Marathon County. The county went for Mr. Trump in 2016, but it's now wrestling with the consequences of China's new 15% retaliatory tariff. Mr. Trump is also going to have some explaining to do to Wisconsin cranberry farmers, Florida orange-juice producers, and Iowa soy and corn growers. *Wall Street Journal* [Editorial Board], June 25, 2018
General Election Interference	China has openly stated that they are actively trying to impact and change our election by attacking our farmers, ranchers and industrial workers because of their loyalty to me. @realDonaldTrump, September 18, 2018 Headline: "Trump says China is 'actively trying to impact and change our election' by targeting US farmers in the trade war" *Business Insider*, September 18, 2018 (covering Trump's Tweet)	

3 Theory and Existing Research

The core theoretical relationship between trade retaliation and changing political behavior focuses on economic voting. Voters engage in retrospective, or anticipatory, assessments of their economic well-being. They form a link between policies like the trade war and their economic welfare, or the welfare of their community, state, neighborhood, etc. They then vote accordingly. These theories find support, with trade retaliation generally lowering support for Trump in targeted areas, as described below.

However, a growing body of research assesses how politically targeted economic coercion and other forms of electoral interference can affect public opinion and political behavior beyond direct economic effects. In introducing the excellent and extensive Partisan Electoral Intervention by the Great Powers data set (PEIG), Dov Levin (2019) defines partisan electoral interventions as taking place when:

> ... [one country] undertakes specific actions to influence an upcoming election in another sovereign country in an overt or covert manner which they believe will favor or hurt one of the sides contesting that election and which incurs, or may incur, significant costs to the intervener(s) or the intervened country (90).

Politically targeted trade retaliation fits the criteria underlying this definition. According to Levin, election interference encompasses acts that were "*intentionally* done in order to help or hurt one of the sides contesting the election for the executive" and "clearly carry significant costs."[24] PTTR carried out in response to the Trump trade war satisfies both of these criteria. First, the European Union, China, and other countries retaliating against the United States did not overtly declare that their targeting decisions were politically-motivated, but anecdotal and systematic data strongly support this conclusion. Fetzer and Schwarz (2020) and Kim and Margalit (2021) both examine the degree to which retaliation against Trump's trade war was politically motivated. Fetzer and Schwarz (2020) find that trade retaliation measures from the European Union, China, Canada, and Mexico tended to be levied against goods produced in counties with higher levels of support for

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[24]Emphasis in original. Note that the PEIG data focus on interference from the United States and Russia, so actions against the United States during Trump's trade war are not included.

Republicans. Counties which "swung" for Trump (comparing his 2016 vote totals to the 2012 totals for Romney) were also more likely to be targeted by America's trading partners. Kim and Margalit (2021) use a different measurement for exposure to retaliation and reach a similar conclusion. They find that a higher GOP vote share in the 2014 and 2016 House elections increased the degree to which Chinese tariffs targeted particular counties, and that this effect was even stronger in swing districts that were not starkly Democratic or Republican.

With respect to Levin's second criteria, politically targeted trade retaliation extracted a heavy economic and political toll. The political toll was especially high for Trump and the Republican Party. Fajgelbaum et al. (2020) show that the trade war resulted in a decline in real US wages and that this fell most heavily on Republican counties due to retaliation. Blanchard, Bown and Chor (2019) estimate that the Republican party lost five seats in the 2018 House elections due to retaliation against Trump's trade war. Kim and Margalit (2021) find that counties with an additional 1% of workers exposed to Chinese retaliation saw declines of 0.26 percentage points for the Republican House candidate, compared to the preceding election. They estimate that retaliation from China cost Republicans four seats. They further supplement this aggregate analysis with survey research and analysis of Google search data, suggesting that voters "connected the dots" between Trump's trade war and the anticipated economic harm of retaliation. Chyzh and Urbatsch (2021) and Wijesinghe (2020) both find a negative relationship between county-level soybean production and Republican vote shares in the 2018 midterm elections.

PTTR thus shares similarities with economic sanctions. Both represent attempts by external actors to use economic coercion to spur political change in the targeted state. Given the similar mechanisms at play, research on public opinion and economic sanction is helpful in theorizing about public reactions to PTTR. Research on economic sanctions suggests that while the direct economic consequences may have the intended effect of decreasing support for the incumbent and their policies, there can also be an offsetting "backlash" or "rally 'round the flag" effect generated by resentment at forward interference.[25] Shulman and Bloom (2012) link this backlash to feelings

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[25]Galtung (1967)

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of nationalism and a desire to protect the autonomy of one's country. As a result, public disapproval for the sending state may increase in the targeted country, and the sanctions may even have the paradoxical effect of increasing support for the policies which the sender hopes to change. They hypothesize that partisan sanctions—which are targeted at a specific political side—likely amplify the perceived violation of state autonomy. They find support for their predictions using survey data from Ukraine, with retrospective questions about Russian and U.S. interference in the 2004 Ukrainian presidential elections on behalf of opposing candidates. Ukrainians viewed both sources of interference as inappropriate, even when the interference came from a country they supported (i.e., pro-U.S. Ukrainians nevertheless felt that U.S. electoral interference was inappropriate). Seitz and Zazzaro (2019) also find evidence of Ukrainian backlash against Russian energy sanctions. Using data from surveys from 2003–2007, they show that Russian sanctions increased support for Westernization rather than having the intended effect of bringing the company closer into the Russian orbit. Using survey experimental data from Israel, Grossman, Manekin and Margalit (2018) also find evidence of a backlash, showing that mentions of European Union labelling requirements for goods produced in disputed Israeli West Bank settlements resulted in increased support for settlement policy, decreased support for the Israeli-Palestinian peace process, and increased hostility towards the EU. While these sanctions were targeted specifically at Israeli settlers in the West Bank, the backlash was found among all Israelis (including non-settlers), as well as among both government supporters and those who identify with the political opposition. Furthermore, Gueorguiev, McDowell and Steinberg (2020) find that U.S. coercion designed to change Chinese monetary policy triggered public backlash in China, They attribute this primarily to an information effect from informing respondents that a foreign government wants to change domestic policy to benefit itself at the expense of the targeted country.

These results imply that PTTR should trigger similar reactions among respondents as other forms of electoral interference. Trade policy that is designed with political motives, such as harming a specific political party or targeting electorally competitive areas, should increase public concern about foreign election interference and generate a backlash against whomever is initiating the

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PTTR. In contrast to generic or broad-based retaliatory measures that do not target specific groups, regions, or partisans, we expect that politically-targeted retaliation will activate public worries about foreign involvement in the democratic process.

Hypothesis 1. *Election Interference: Learning that trade retaliation is politically targeted should increase concerns of electoral interference and generate backlash against the the actor imposing the retaliation.*

3.1 Moderation Hypotheses

How might different respondents perceive PTTR? Existing work on election interference, foreign endorsements, and sanctions suggests that respondents should triangulate their reaction to foreign economic coercion based on their own personal preferences and partisan affiliations. If the foreign action targets a politician, party, or policy that the respondent supports, then she should react more negatively than if the foreign action targets an opposing political party or politician.

Tomz and Weeks's (2020) influential research uses survey experiments to show that Americans exhibited a "double standard" when prompted with information about hypothetical interference in a future election. Americans reacted more negatively to electoral interference intended to harm their preferred policy, compared to meddling against the other party. One of the types of electoral interference analyzed by Tomz and Weeks is what they refer to as "threats," which "combine an endorsement with a promise of future reward or threat of future punishment, such as threatening to downgrade future relations if the preferred candidate loses" (859). While PTTR is not made explicitly contingent upon the outcome of a future policy, it does seek to inflict political pain in response to a given policy, and thus mirrors a threat which has been carried out. Tomz and Weeks find that a weak majority of respondents (55%) disapprove of these types of foreign actions. However, the partisan "double standard" is quite large. Democrats are substantially more likely to disapprove of threats when the threat is carried out in support of a Republican (71%) than when it supports a Democrat (39%). Republicans showed a similar split: 71% disapproved of threats in

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support of a Democrat, while only 51% disapproved of threats which supported a Republican.

Studying foreign side-taking endorsements, Bush and Prather (2020) find a partisan effect in the United States and Tunisia. PTTR also fits their definition of side-taking, which "occurs when a country meddles in another country's domestic politics in favor of a particular side" (3). When a foreign government endorses a respondent's preferred candidate, the respondent is more supportive of economic engagement with the foreign country. Respondents had the opposite reaction to endorsements of their preferred candidate's opponent. Corstange and Marinov (2012) find a similar effect using survey experiments in Lebanon. When a foreign country takes a partisan stance, supporting one side over another, this polarizes respondent attitudes regarding relations with the foreign country. They theorize that pre-existing partisan divides help amplify the polarizing effect of foreign side-taking, a background condition that is clearly present in the United States. Similar evidence has also been found in survey work in Russia.

Other studies hypothesize and find mixed effects of sanction targeting on respondent reactions. One of the few exceptions to the polarization hypothesis, Sejersen (2021) finds that partisan targeting can lower disapproval of sanctions. Using survey experimental data from Venezuela, he finds that targeting sanctions at the incumbent regime blunts backlash, as citizens perceive the sanctions as entailing less collateral damage. Conversely, Shulman and Bloom (2012) argue that partisan targeting can raise overall disapproval of the sanction, since it implies an even greater intrusion on national elections and identity.

Applied to politically targeted trade retaliation, these arguments imply that members of the public will react in predictably partisan ways to PTTR. Those whose preferred party leaders are directly targeted should have the strongest negative reaction and express the greatest concerns about foreign interference. In the context of President Trump's trade war, learning that retaliatory tariffs targeted Republican strongholds or Trump's political base should generate the greatest concern about election interference amongst Republicans. By contrast, we would expect Democrats to have a more muted reaction, given that the retaliatory tariffs targeting the Republican base are less likely to harm Democrats and may even be viewed as politically advantageous.

Hypothesis 2. *Base Targeting—Partisan Effects: Supporters of the side targeted by PTTR should be most concerned about electoral interference and exhibit the greatest backlash.*

3.2 Swing State Targeting

While existing work provides the clearest guidance for base targeting, we now consider how targeting swing states is theoretically distinct from targeting a politician's base. The above theories provide insights regarding the aggregate effect of PTTR and partisan expectations when tariffs are targeted to harm partisan strongholds. However, whereas a sanction that targets regime supporters at least attempts to match the damage to the politician responsible for the policy that the foreign government wants to change, a sanction that targets electorally competitive areas is likely to harm both supporters of the regime and members of the opposition. This is a critical difference since the economic harms are likely to be distributed differently, but perhaps more importantly, the political consequences may be much greater since targeted swing states can change the political outcomes.[26]

When foreign parties target swing states, it may trigger concern and backlash among both incumbent supporters and opponents, potentially for different reasons. According to a consequentialist logic,[27] regime supporters might be especially worried about swing state targeting not only because some members of their party are being targeted, but also because such targeting takes a heavier toll on their preferred candidates. The political consequences of targeting partisan strongholds are likely to be minimal, since a large percentage of voters would have to vote across party lines to change the electoral outcomes. But targeting swing states may shift electoral outcomes even if only a small percentage of voters in those states are influenced. Importantly, voters do not just care about the policies tied to an economic spat. They care about the bundle of policies espoused by their preferred candidate. So a voter considering swing state targeting might look beyond the economic or pocketbook consequences that are limited to trade policy, and take into account the knock-on electoral consequences which can affect social and economic policy in many

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[26]See Blanchard, Bown and Chor (2019) and Kim and Margalit (2021).
[27]Tomz and Weeks (2020).

other areas.

In the case of Trump's trade war, this implies that Republicans may have had the most to lose when PTTR targeted swing states, since a small vote shift in a few states could potentially shift the political balance of power in the country. This could make them respond with the highest levels of concerns about foreign interference targeting electorally competitive areas.

Hypothesis 3. *Swing State—Electoral Concern: When PTTR targets electorally competitive areas (swing states), supporters of the incumbent should be most concerned about electoral interference.*

The targeting of swing states may also generate concern and backlash among opponents of the incumbent, but for different reasons. Since swing states, by definition, host a relatively even distribution of supporters of both parties, that means a substantial number of opposition supporters will be harmed when swing states are targeted. This could generate concern and backlash amongst opposition members, such as Democrats during the recent trade war, since they, and their co-partisans, are likely to be directly harmed by the retaliation and may also be worried that their votes are being influenced by foreign actors. Hypothesis 3 and Hypothesis 4 are not mutually exclusive. The latter says that both Republicans and Democrats react negatively to the swing treatment, while the former says that Republican reactions should be greater.

Hypothesis 4. *Swing State—General Concern: When PTTR targets electorally competitive areas (swing states), members of the supporting and opposition parties should both be concerned about electoral interference and exhibit backlash, since both are targeted.*

4 Research Methods

To assess the effect of politically targeted trade retaliation on public attitudes, we employ a survey experiment that allows us to isolate the effects of different types of trade retaliation. We fielded our

survey using Lucid Theorem on a diverse sample of over 3,500 respondents. The study was fielded between October 20th and 25th in 2020 and targeted respondents to resemble the demographics of US adults based on gender, age, geographic, and racial distributions. Survey samples from Lucid are increasingly used in social science research, including numerous articles published in top political science journals.[28]

While Lucid allows researchers to access a diverse sample of respondents, recent research finds that data quality declined during the pandemic of 2020, so we employed attention checks and asked respondents to pledge to pay attention to address quality concerns. Approximately 36 percent of recruited participants failed the attention checks and were not included in the sample, which is generally consistent with broader trends for the time.[29] Even though response quality declined during the pandemic, Peyton, Huber and Coppock (2020) find that studies conducted throughout the pandemic replicated earlier studies and should generalize beyond the pandemic, though treatment effects from experiments fielded during the pandemic were somewhat more conservative given reduced attention of respondents. We also implemented the recommendation of Burleigh, Kennedy and Clifford (2018), and blocked respondents from participating if they were located outside of the US or were flagged for using a Virtual Private Server (VPS). The sample resulted in a diverse sample that closely mirrored the national population on demographics of age, partisanship, and gender, as shown in the demographic breakdown in Appendix A. Like most online surveys, our sample skews lower on income and is somewhat more likely to be college educated than the national population.

Our survey experiment randomly assigned respondents to one of four conditions, each of which varied what the respondent read about the trade war. The randomization resulted in a well-balanced sample across treatment conditions.[30] After being assigned to the control or one of the treatment conditions, respondents were then asked to answer a series of questions, which we discuss below.

In the control condition, respondents read a few short lines about the trade war.

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[28]For examples of political science articles using Lucid, see Tomz and Weeks (2020), Kim and Margalit (2021), and Margalit and Solodoch (Forthcoming).

[29]Aronow et al. (2020).

[30]See Appendix A.

Control: In 2018 and 2019, the Trump Administration started a trade war by imposing tariffs on imports of steel and aluminum from the European Union.

These tariffs are meant to lower imports of steel from Europe into the United States and to convince the European Union to change its trade policies.

In response to President Trump's tariffs, the European Union retaliated with tariffs against a variety of products that it imports from the United States.

The control treatment *does* specify that retaliation occurred, but *does not* specify the nature of the retaliation. This allows us to differentiate between the public's response to retaliation in general, versus retaliation that is politically targeted in the subsequent treatments.

Our study included three separate treatment conditions that described particular features of the retaliation. For respondents not in the control condition, they read the same information as in the control condition, and were randomly assigned to also read one additional piece of information, which was either the the Base, Swing, or Placebo treatment.

Base: ... The European Union intentionally chose products that come from states that voted for Trump in the last election. The European Union hopes that punishing these states will hurt President Trump politically and convince him to end the trade war.

Swing: ... The European Union intentionally chose products that come from "swing states" that will be important in the upcoming US election. The European Union hopes that punishing these states will hurt President Trump politically and convince him to end the trade war.

Placebo: ... The European Union announced the list of products in a press release and also communicated their decision to the United States Trade Representative through diplomatic channels. The official notification contained further details about the tariffs.

The Base and Swing conditions are the most important for our study. They each contain information about the political targeting behind the EU's retaliation. They are very similar to one another in word count, structure, and overall tone. They both explain the intentionality behind the EU's targeting, describing how the retaliation is meant to affect Trump's decision making. When compared to the control condition, they allow us to isolate the effect of trade retaliation *being politically targeted* at the base or swing states, beyond the mere existence of retaliation itself.

The Base condition emphasizes how retaliation targeted states that supported President Trump in previous elections. The Swing treatment emphasizes how retaliation targeted more electorally competitive areas in battleground states. We modeled the wording of these treatments after media reporting on the tariffs, so that our treatment in the survey experiment resembles the "treatment" received by respondents when they read information about the trade war or heard arguments from elites.

We avoided mentioning specific states or industries targeted by retaliation, since that might induce confounding if respondents inferred additional information beyond our desired treatments.[31] We also chose the European Union instead of China—another country that engages in PTTR— because the European Union represents a harder test for our theory. Most EU countries are allies of the United States and are not generally thought to interfere in American elections. By contrast, China is an adversary of the US and has engaged in cyber attacks and espionage against the US. We expect that respondents might be more sensitive to additional information about political targeting from a geo-strategic adversary, compared to core allies, making ours a conservative test of the theory. Survey research also tends to find higher support for protectionism against Asian countries compared to European ones. For example, Di Tella and Rodrik (2020) found large differences in support for tariffs depending on whether an adverse economic shock came from France versus Cambodia.

We included the Placebo treatment to ensure that effects of the Base and Swing treatments resulted from the informational content of those treatments, as opposed to simply having additional information on the page. Like the Control treatment, the Placebo treatment describes the presence of retaliation but does not attribute any political motivations. The Placebo treatment has a nearly identical word count to the Base and Swing treatments, but contains little information that would affect a respondent's attitude about the trade war.

After reading about the trade war, respondents were presented a bullet-point recap of the key details of the treatment, which remained at the top of the survey screen as they answered post-

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[31]Dafoe, Zhang and Caughey (2018).

treatment questions. For example, a respondent assigned to the Base treatment would have read:

> To recap:
>
> - The US put tariffs on imports from the EU to get them to change their trade policies.
> - The EU retaliated with tariffs of their own on imports from the US.
> - The EU's retaliatory tariffs targeted President Trump's base.

Our primary outcome measure comes from response to the following question:

> I am worried the European Union's retaliatory tariffs are an attempt to interfere with the upcoming US Presidential election.

Respondents could choose from five responses, ranging from "Strongly agree" to "Strongly disagree" with "Neither agree nor disagree" as a middle option. We deliberately chose the wording of this outcome measure to have negative content – the respondent is *worried* about election interference – rather than merely asking respondents whether this constituted election interference. To agree with the prompt, respondents indicate more than just an acknowledgement that retaliation was politically targeted.

Since foreign interference can also generate a backlash against the interfering country,[32] we also included a feeling thermometer asking respondents to "rate the European Union (EU) on a thermometer that runs from 0 to 100 degrees. Rating above 50 means that you feel favorable and warm toward the EU, and rating below 50 means that you feel unfavorable and cool toward EU." This measure allows us to assess whether politically targeted trade retaliation generates backlash toward the retaliating actor.

5 Results

We progress through our analysis in three parts. First we analyze whether our respondents are worried about PTTR as a form of election interference. Specifically, we test whether the Base

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[32]Bush and Prather (2020)

and Swing treatments result in respondents being worried that the EU's retaliatory tariffs are an attempt to interfere with the election. We then analyze the moderation hypotheses, testing whether Republicans, Democrats, and Independents are more likely to be worried about particular types of PTTR as a form of election interference. Lastly, we shift our focus to the EU feeling thermometer measure, testing whether PTTR generates a backlash against the EU.
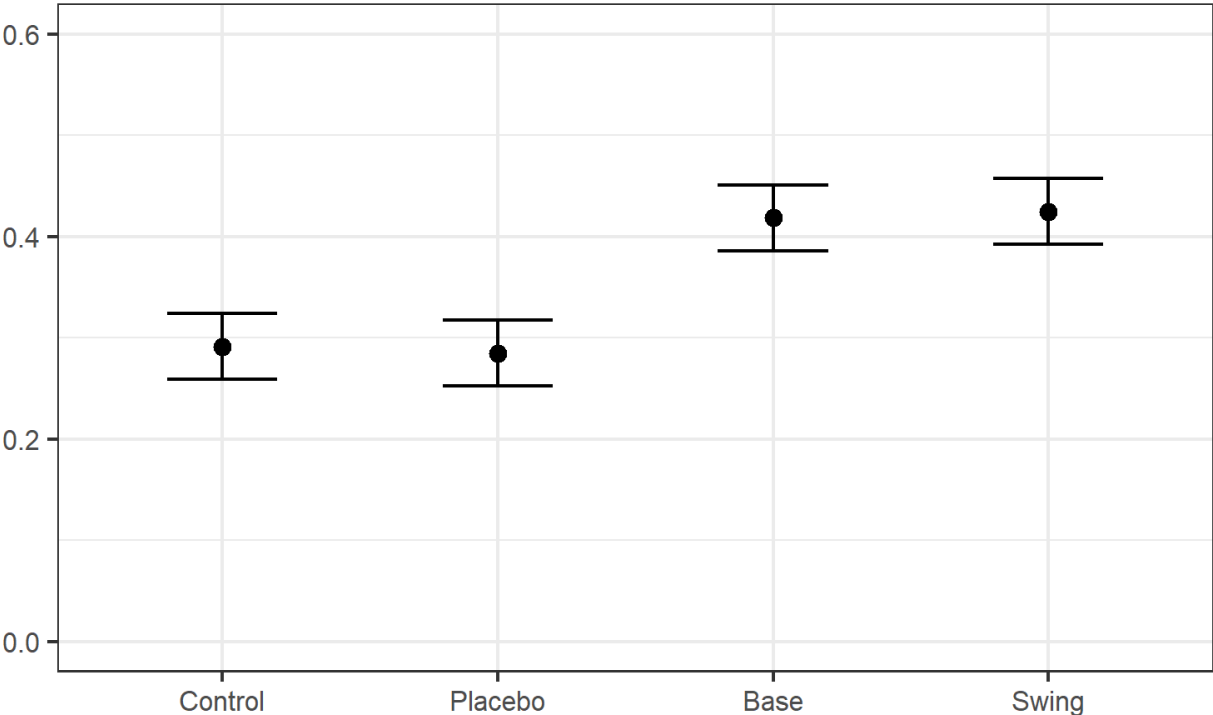
Hypothesis 1: Effect of Treatment on Fears of Interference

The main outcomes of our treatments are displayed in Figure 2, which shows the proportion of respondents who are worried that the EU's tariff retaliation is an attempt to interfere in the 2020 presidential election. The left side of the figure shows that 29 percent of the respondents in the control condition are worried that the retaliatory tariffs are an attempt at election interference. This shows that even generic trade retaliation in the lead-up to the 2020 election was viewed by some as a concerning form of election interference. We also find that the placebo condition does not change the public's concern ($p = 0.78$), which gives us confidence that the treatment effects reported in the other conditions are not driven by the length of text of the treatments.

When comparing the Base and Swing treatments to the control, we find strong support for our first hypothesis. Each of the treatments specifying politically targeted tariff retaliation result in substantively large and significant effects for the full sample, as shown on the right side of Figure 2. The Base and Swing treatments each lead to a 13 percentage point increase in the number of respondents who express concern about election interference ($p < 0.01$). These results clearly demonstrate that politically targeted trade retaliation is viewed as a distinct form of foreign interference than generic trade retaliation and a substantial portion of the public is concerned that PTTR is attempted election interference.

These results were robust to a variety of other specifications, in addition to these simple comparisons. In the appendix, section C.2, we also tested whether respondents reacted differently to information about the trade war *without* specifying that the other country retaliated. Section C.1 replicates all analyses using respondents' characteristics (e.g. age, income, etc). We also repli-

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Figure 2: Politically Targeted Trade Retaliation Perceived as Election Interference

The figure shows the proportion of respondents in each condition who are somewhat or strongly worried the European Union's retaliatory tariffs are an attempt to interfere with the upcoming US Presidential election. Lines show 95 percent confidence intervals.

cate results excluding respondents who said they neither agreed nor disagreed with the statement about election interference, shown in section C.5. The main results are robust to these specification changes.

Moderation Hypotheses

Our second and third hypotheses predict that reactions to different types of PTTR should vary by respondent party affiliation. We expect the Base treatment to show similar partisan splits as those found in research on electoral interference—where supporters of the targeted politician react more negatively than opponents (Hypothesis 2). Hypotheses 3 predicts a similar partisan split in response to the Swing treatment, whereas Hypothesis 4 predicts that both incumbent supporters and oppositions members will respond negatively to the Swing treatment, since both are targeted.

We show our results broken down by party in two ways. Figure 3 shows the proportion of respondents worried about electoral interference, by treatment condition and party. Figure 4 shows results from a linear regression of a binary variable measuring whether respondents are worried about the retaliation being election interference or not on indicators for the various treatment conditions and their interactions with indicator variables for identification as a Republican or Independent. Democrats are the base category. The figure shows the change in the predicted probability that a respondent is worried about election interference compared to the baseline control for Democrats. The Figure reports the treatment effects for models with and without interactions between the treatment and partisanship identification.

Figure 3 shows that Republicans (grey squares) have a higher baseline concern about trade retaliation being a form of election interference than either Democrats or Independents, in all treatment conditions. Additionally, comparing the Base and Swing treatments to the control treatment shows that each form of PTTR increases concern about election interference for all parties. However, Figure 4 shows that the magnitude of treatment effects varied across parties, in ways both consistent and inconsistent with predictions.

Interestingly, we do not find support for Hypothesis 2. Republicans and Democrats alike re-

acted negatively to tariffs targeting states that Trump previously won. Looking at the second line from the bottom of Figure 4, Republicans have a slightly larger reaction to the Base treatment, compared to Democrats or Independents, but we cannot reject the null hypothesis that the treatment effect is the same for Republicans and Democrats. Democrats did not substantially temper their concerns about election interference, even when retaliation targeted states that Trump won. This result suggests that politically motivated targeting of the Republicans base generates heightened concern about election interference across the political spectrum, not just among Republicans.

Turning to the Swing treatment, it increased worry about election interference for both Republicans and Democrats. This is consistent with Hypothesis 4, that both sides react negatively to the targeting of swing areas. We also find support for our third hypothesis, which is that Republicans should react more strongly to the Swing treatment. The positive and significant interaction effect for Republicans (fourth line from the bottom) shows that the negative reaction to the Swing treatment was even larger for Republicans than for Democrats. In substantive terms, we find that the Swing treatment increases the number of Republicans expressing concern by 21 percentage points ($p < 0.01$), whereas it only increases concern among Democrats by 6 percentage points ($p = 0.05$).
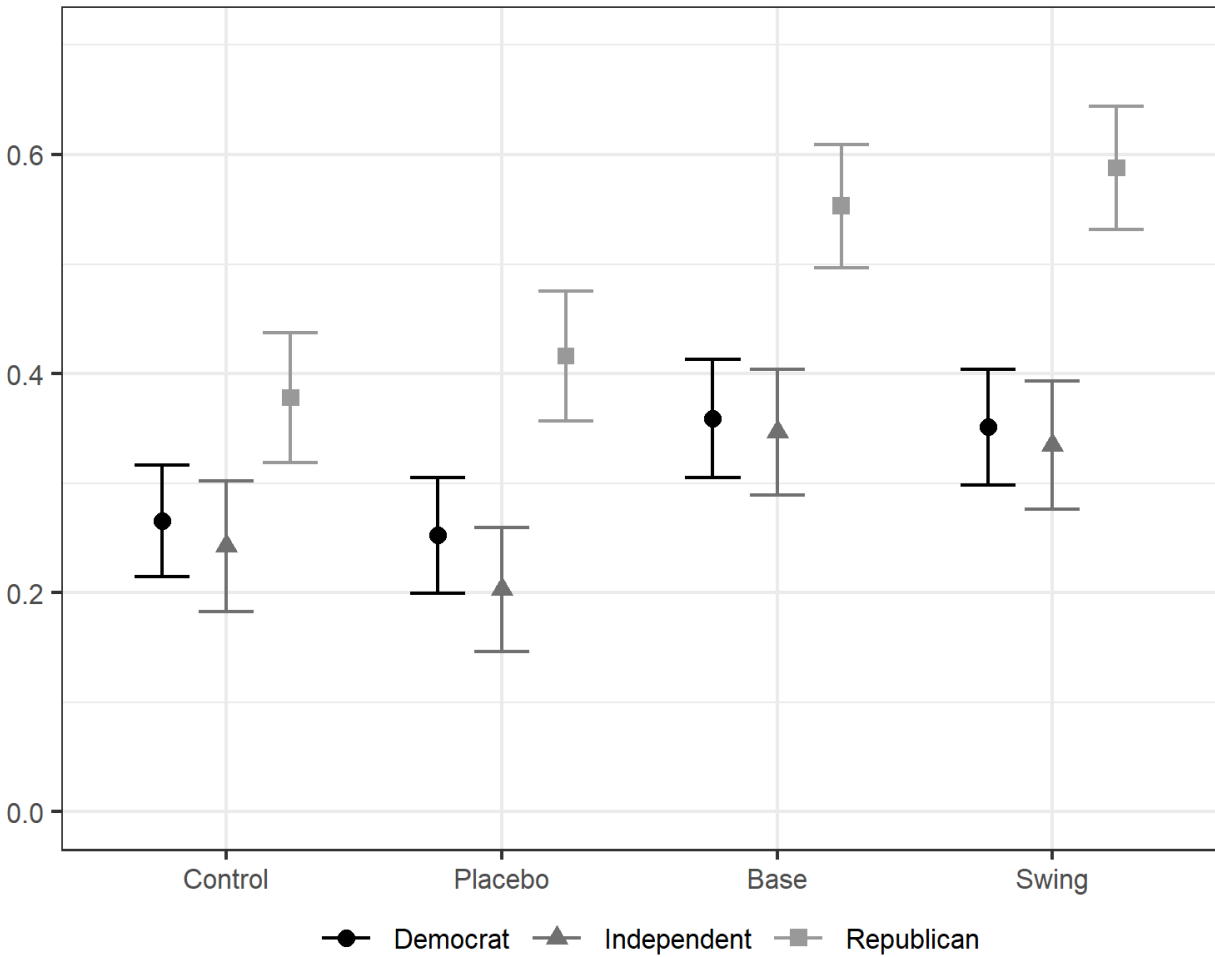
We also investigated whether treatment effects differed by the respondents' locations. Theoretically, a respondent living in a swing or base state might react more negatively to treatments highlighting how foreign countries targeted them with retaliation. In section C.3 of the appendix, we show that there is some, though generally weak, evidence that treatment effects differed across states. For example, Republicans living in base states reacted more negatively to the Base treatment. However, sufficient power for detecting these heterogeneous treatment effects would require a much larger sample size than ours.[33]

Effect of Treatment on Perceptions of the EU

We now shift from analyzing respondents' concerns about election interference to assessing their feelings about the EU. We expect that learning that trade retaliation is politically targeted will

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[33]See the appendix, section C.3 for results and power calculations.

Figure 3: Politically Targeted Trade Retaliation Perceived as Election Interference, By Party

The figure shows the proportion of respondents in each condition who are somewhat or strongly worried the European Union's retaliatory tariffs are an attempt to interfere with the upcoming US Presidential election. Respondents are separated based on whether they self-identified as a Democrat, Republican, or something else (categorized as Independent). Lines show 95 percent confidence intervals.

Figure 4: Partisan Interactions on Worries about Election Interference

The figure shows the effect of our treatments on whether a respondent is worried the European Union's retaliatory tariffs are an attempt to interfere with the upcoming US Presidential election. Respondents are separated based on whether they self-identified as a Democrat, Republican, or something else (categorized as Independent). Lines show 95 percent confidence intervals.

lead to less favorable opinions of the EU, and that Republicans would respond more negatively when they learn that their base has been targeted. We use a feeling thermometer to assess whether respondents feel favorably (scores above 50), unfavorably (scores below 50) or neutrally (score of 50) toward the EU.[34]
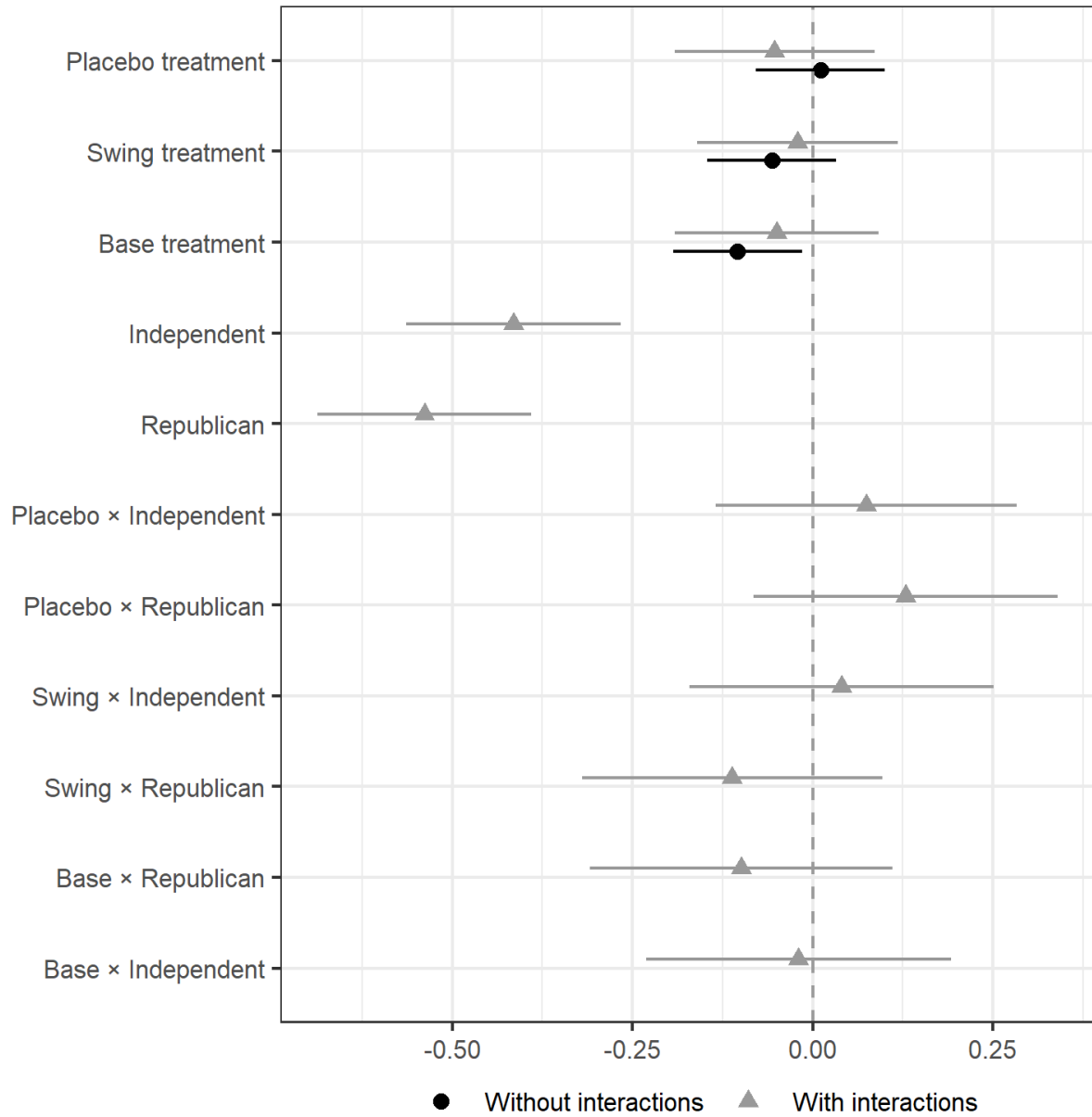
The results of our treatments on attitudes toward the EU are displayed in Figure 5. In general, we did not find as strong effects as we would have expected, though the treatments varied in their effects on perceptions towards the EU. The Base treatment has a negative effect on attitudes toward the EU ($p = 0.02$).[35] In substantive terms, about 5 percent fewer respondents had favorable feelings toward the EU in the Base treatment than in the control ($p = 0.05$) and about 6 percent more respondents had unfavorable views toward the EU ($p = 0.02$). These results are consistent with one type of PTTR generating a backlash against the actor initiating the politically targeted retaliation. However, the Swing treatment does not have a significant effect on feelings toward the EU, suggesting that the public differentiates between targeting electorally competitive districts as opposed to targeting a political party's stronghold.

We next test whether respondents' political affiliation moderates the effects of our treatments on feelings toward the EU. Figure 5 displays the effects of our treatments when interacted with respondents' party affiliation. We find that Independents and Republicans have significantly less favorable attitudes toward the EU, but we do not find that Republicans' feelings toward the EU shift significantly more than Democrats when exposed to the treatments.

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[34]Appendix, section C.4, shows similar results using the continuous thermometer measure.

[35]This results is robust to including controls for political party of the respondent, with the Base treatment negative and significant ($p = 0.04$).

Figure 5: Effects and Interactions on Feeling toward EU

The figure shows the effect of our treatments on whether a respondent feels unfavorable (-1), neutral (0), or favorable (1) toward the EU. Respondents are separated based on whether they self-identified as a Democrat, Republican, or something else (categorized as Independent). Lines show 95 percent confidence intervals.

6 Conclusion

As the spectre of electoral interference in developed democracies grows, so too does the possibility that "purely" economic policies or other tools of international statecraft will be viewed as foreign interference. Understanding public reactions to these policies will increasingly require a look beyond their economic or pocketbook consequences. It is possible that the expansion of the concept of election interference to include PTTR will blunt the effectiveness of PTTR moving forward. If the target populace is more aware of the political machinations behind trade policy and treats it as meddling, instead of "just" economic statecraft, then citizens may be more resistant to acquiescing to the changes desired by the targeting state.

In the case of United States' recent trade war, our evidence clearly shows that a significant portion of Americans are worried about politically targeted trade retaliation as a form of election interference. Importantly, even during an era of heightened polarization, Republicans and Democrats both reacted strongly to PTTR with each group expressing significant worries about election interference when PTTR is directed at Trump's political base or toward key electoral swing states. Although Republicans responded with greater concern to retaliation targeted at swing states, it's clear that Americans do not view PTTR as a purely partisan issue. Instead, we find that PTTR is broadly recognized as a concerning form of foreign intervention across the political spectrum.

Our results also suggest that the total costs of economic coercion should include the non-pocketbook effects on public opinion. An economic analysis of the costs of the Trump trade war would assess job market, price, and consumption effects, which vary across region and individual. The non-material costs stemming from the targeting itself may also factor into an overall assessment. If targeting minimizes economic harm while maximizing political harm, it may have the unfortunate side effect of further deteriorating relations and undermining confidence in the democratic process.

Additionally, this blurring could have implications for the differential effects of economic coercion against democratic and non-democratic targets. If economic coercion targeting democracies is increasingly interpreted as electoral interference, and is therefore more likely to trigger negative

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reactions, then democracies may become more resistant to that coercion. When targeting democracies, coercion may be less likely to be interpreted as electoral interference the further away from an upcoming election, so targeted democracies could become even more recalcitrant as elections approach. All of these are worthwhile extensions of the study of politically targeted trade retaliation.

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Appendix Sections

Appendix A: Sample Method and Demographics

Appendix B: Media Coverage of PTTR

Appendix C: Additional Analyses

A   Appendix: Sample Demographics

A.1   Summary Statistics for Sample

Table A.1 shows summary statistics for various respondent characteristics, for our sample, in the first column. The second column shows those same characteristics from the 2019 U.S. Census data. For partisan identification, we used data from Pew, which covers registered voters for 2018/2019. Our sample tracked relatively closely with the broader U.S. population on most measures. Our sample included slightly fewer older respondents, and the average income of our sample was below U.S. averages. Both are common features of online surveys like ours. Our respondents had somewhat higher levels of education.

Demographic	Portion of Sample	US Population
Age 18 to 24	0.127	0.132
Age 25 to 39	0.276	0.266
Age 40 to 59	0.314	0.325
Age >50	0.249	0.293
Female	0.522	0.510
Household income $0 to $50,000	0.504	0.371
Household income $50,001 to $100,000	0.301	0.288
Household income $100,001 to $150,000	0.105	0.156
Household income >$150,000	0.090	0.185
Republican	0.314	0.290
Democrat	0.377	0.330
Independent (includes non-partisan or other)	0.309	0.380
Attended college	0.745	0.611

Table A.1: Study demographics. US population information on age, sex, income, and education are from the Census Bureau and are for 2019. Partisan identification is from Pew and covers registered voters for 2018/9.

A.2   Balance Across Treatment Groups

Here, we compare balance across treatment groups in respondent characteristics. We do this using a series of pairwise comparisons, between respondents in the control group and then each of the three treatment groups. Table A.2, Table A.3, and Table A.4 shows the means of each variable,

for the control group and the swing, base, and placebo treatment groups respectively. Below each table, we report the omnibus χ^2 test statistic and p-value from the approach developed in Hansen and Bowers (2008).

For each pairwise comparison, we fail to reject the null, implying overall balance in respondent characteristics, between control and treatment. The approach developed in Hansen and Bowers (2008) is generally more conservative than an approach based on a logistic regression of treatment on covariates. In that approach, the researcher regresses treatment (logistic) on a constant and all covariates, then on a constant alone. The researcher then uses a likelihood ratio test to assess whether they can reject the null hypothesis that the reduced model (without covariates) fits the data better. When using that approach, we also fail to reject the null, which implies balance. The p-values associated with those χ^2 test statistics are: 0.22, 0.16, and 0.18.

The results from the Hansen and Bowers (2008) and logistic regression approach are very similar since our sample size contains approximately 875 respondents per treatment group. The comparisons between control and treatment are thus based on approximately $N = 1,750$ which is over 100 times the number of covariates being assessed for balance.

Two individual comparisons across treatment and control yield significant p-values at 0.05 level. There are 5% less people in one of the middle income brackets for the control group, compared to those in the base treatment. There are also 5% more Democrats in the control group compared to the base group. Our finding of only two statistically significant differences at the $p < 0.05$ level is actually slightly lower than what one would expect when making $16x3 = 48$ pairwise comparisons. These two differences are also substantively small and highly unlikely to influence results. In the case of difference in proportion of Democrats, we conduct subset analysis by party for treatment effects, in the main manuscript, which conditions on that variable.

Table A.2: Balance test between control group and swing treatment

	Control Prop.	Swing Prop.	Diff.	SD of Diff.	Z-score	
Age 18 to 24	0.16	0.15	-0.01	0.02	-0.38	
Age 25 to 39	0.27	0.29	0.01	0.02	0.59	
Age 40 to 59	0.31	0.33	0.01	0.02	0.60	
Age >60	0.26	0.25	-0.01	0.02	-0.48	
Female	0.51	0.51	-0.01	0.03	-0.23	
Male	0.49	0.49	0.01	0.03	0.23	
Household income $0 to $50,000	0.53	0.50	-0.03	0.03	-1.09	
Household income $50,001 to $100,000	0.27	0.31	0.04	0.02	1.96	.
Household income $100,001 to $150,000	0.11	0.11	0.00	0.02	0.25	
Household income >$150,000	0.10	0.08	-0.02	0.01	-1.49	
Republican	0.30	0.33	0.03	0.02	1.15	
Democrat	0.41	0.37	-0.03	0.02	-1.42	
Independent (includes non-partisan or other)	0.29	0.30	0.01	0.02	0.35	
Attended college	0.73	0.75	0.03	0.02	1.17	
Swing state resident	0.36	0.31	-0.05	0.02	-1.91	.
Base state resident	0.19	0.18	-0.01	0.02	-0.49	

Overall test $\chi^2 = 16.5$ with 13 degrees of freedom ($p = 0.224$). Significance codes: $\cdot = 0.1$, $* = 0.05$, $** = 0.01$.

Table A.3: Balance test between control group and base treatment

	Control Prop.	Base Prop.	Diff.	SD of Diff.	Z-score	
Age 18 to 24	0.16	0.13	-0.03	0.02	-1.73	.
Age 25 to 39	0.27	0.31	0.04	0.02	1.60	
Age 40 to 59	0.31	0.31	-0.00	0.02	-0.01	
Age >60	0.26	0.24	-0.01	0.02	-0.62	
Female	0.51	0.52	0.00	0.03	0.12	
Male	0.49	0.48	-0.00	0.03	-0.12	
Household income $0 to $50,000	0.53	0.48	-0.05	0.03	-1.84	.
Household income $50,001 to $100,000	0.27	0.32	0.05	0.02	2.31	*
Household income $100,001 to $150,000	0.11	0.10	-0.00	0.02	-0.31	
Household income >$150,000	0.10	0.10	-0.00	0.01	-0.14	
Republican	0.30	0.33	0.03	0.02	1.29	
Democrat	0.41	0.35	-0.05	0.02	-2.10	*
Independent (includes non-partisan or other)	0.29	0.31	0.02	0.02	0.92	
Attended college	0.73	0.75	0.02	0.02	0.91	
Swing state resident	0.36	0.33	-0.03	0.02	-1.13	
Base state resident	0.19	0.19	0.00	0.02	0.10	

Overall test $\chi^2 = 17.7$ with 13 degrees of freedom ($p = 0.167$). Significance codes: $\cdot = 0.1$, $* = 0.05$, $** = 0.01$.

Table A.4: Balance test between control group and placebo treatment

	Control Prop.	Placebo Prop.	Diff.	SD of Diff.	Z-score	
Age 18 to 24	0.16	0.13	-0.03	0.02	-1.72	.
Age 25 to 39	0.27	0.30	0.03	0.02	1.13	
Age 40 to 59	0.31	0.34	0.02	0.02	0.92	
Age >60	0.26	0.25	-0.01	0.02	-0.32	
Female	0.51	0.52	0.01	0.03	0.40	
Male	0.49	0.48	-0.01	0.03	-0.40	
Household income $0 to $50,000	0.53	0.49	-0.03	0.03	-1.36	
Household income $50,001 to $100,000	0.27	0.31	0.04	0.02	1.79	.
Household income $100,001 to $150,000	0.11	0.11	0.00	0.02	0.03	
Household income >$150,000	0.10	0.09	-0.01	0.01	-0.48	
Republican	0.30	0.30	-0.00	0.02	-0.15	
Democrat	0.41	0.38	-0.03	0.02	-1.15	
Independent (includes non-partisan or other)	0.29	0.32	0.03	0.02	1.37	
Attended college	0.73	0.75	0.02	0.02	1.12	
Swing state resident	0.36	0.33	-0.03	0.02	-1.17	
Base state resident	0.19	0.17	-0.02	0.02	-1.25	

Overall test $\chi^2 = 17.4$ with 13 degrees of freedom ($p = 0.180$). Significance codes: $\cdot = 0.1$, $* = 0.05$, $** = 0.01$.

B Appendix: Media Coverage of PTTR

To assess the prevalence of media coverage of PTTR, we used Nexis Uni to search for newspaper articles in the United States from January 1, 2018 to October 31, 2020. To limit the the universe of results to those related to the tariff escalation and relation associated with the trade war, we used the search terms "trade AND retal* AND tariff*". This first search, when restricted to the United States and Newspapers, yielded over 3,500 results. Nexis Uni sorts results by relevance, but we also manually checked that each article was about the trade war. We then selected the first 100 results for coding.[36] This sample resulted in a broad range of stories across the date range specified and represented a diverse set of sources including local, regional, and national newspapers.

The second search used the same search terms and date range, but restricted the sample to newspapers with the highest readership and also cable news transcripts. To determine high readership newspapers, we used the 2013 Alliance for Audited Media's 2013 Snapshot Report. From the report we selected the top-25 paid newspapers with the highest average circulation (both print and digital). We then searched those that were available through Nexis Uni, which resulted in the following sources:

- Wall Street Journal Abstracts
- The New York Times
- USA Today
- Los Angeles Times
- Daily News (New York)
- The New York Post
- The Washington Post
- The Orange County Register
- Tampa Bay Times
- The Philadelphia Inquirer
- Star Tribune (Minneapolis)

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[36]We removed duplicate appearances that resulted from the source issuing a correction to the initial story.

- The Atlanta Journal-Constitution

- The Mercury News (San Jose)

Additionally, we also searched cable news transcripts from ABC, CBS, and NBC.

Articles were coded as "Base" if they:

- Mention base states affected/targeted by name (e.g. "producers in Mississippi will be hit hard"). Base states: AL, AK, AR, ID, IN, KY, KS, LA, MO, MS, MT, NE, ND, OK, SC, SD, TN, UT, WY, WV.[37]

- If article mentions specific politician being targeted, code the party of the politician and then code the state they represent [Base, Swing, or nothing if neither], or if the article refers to the politician representing the republican base, stronghold, etc

- Those that mention affecting/targeting "Republicans", "base", Trump's supporters, areas that carried trump, etc.

Articles were coded as "Swing" if they:

- Mention swing states affected/targeted by name. Swing states: AZ, CO, FL, GA, ME, MI, MN, NC, NH, NV, PA, VA, WI.[38]

- Mentions "swing", "competitive" districts, states that flipped, etc that are affected/targeted

- If article mentions specific politician being targeted, code the party of the politician and then code the state they represent [Base, Swing, or nothing if neither], or if the article refers to the politician representing a swing state, contested state, etc

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[37]States were coded as "Base" if former President Trump won with greater than 10 percent margin in 2016.

[38]States were coded as "Swing" if former President Trump won with less than a 6 percent margin in 2016. Both swing and base codings are similar to those in existing work. Kim and Margalit (2021) use a 10% cutoff criteria (eg vote share for one party is 0.4 - 0.6) for categorizing swing areas. Blanchard, Bown and Chor (2019) use competitiveness bins, based on presidential vote share (<0.3, 0.3-0.4, 0.4-0.5, 0.5-0.6, 0.6-0.7, >0.7). Around the 50% vote share, this is equivalent to a 10% cutoff criteria. Ma and McLaren (2018) define swing states using a 5% and a 10% cutoff criteria.

C Appendix: Additional Analyses

C.1 Results including respondent characteristics

Table C.1 shows results from regressing the electoral interference outcome variable on treatment indicators and a set of respondent characteristics. Column 1 is the analogue of the regression used to generate Figure 2 in the main manuscript. Column 2 is the analogue of the regression for Figure 3. Columns 3 and 4 are the analogues of Figure 5, which uses the EU thermometer measure as the outcome variable.

Results are very similar to those presented in the main table, which is to be expected given random treatment assignment. For worry about election interference, both the Base and Swing treatments have positive and significant effects, with the Placebo treatment not having a significant effect. The Swing treatment is strongest for Republicans. For feelings towards the EU, the Base treatment is still the only one with a negative and significant effect, and there are not significant interaction terms between treatment and party.

C.2 Analysis Using "No Retaliation" Condition

The main manuscript compared outcomes between the control condition where the EU engaged in tariff retaliation (without it being politically targeted) with various forms of PTTR in the treatment conditions. We also included an additional treatment condition, which did not include any references to the existence of EU retaliation at all, which read as follows:

> In 2018 and 2019, the Trump Administration started a trade war by imposing tariffs on imports of steel and aluminum from the European Union.
>
> These tariffs are meant to lower imports of steel from Europe into the United States and to convince the European Union to change its trade policies.

This treatment was included because it played a role in analyzing outcomes not focused on in this paper. Recall that the outcome question asked respondents to react to "I am worried the European Union's retaliatory tariffs are an attempt to interfere with the upcoming US Presidential

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Table C.1: Effect of treatment, with controls

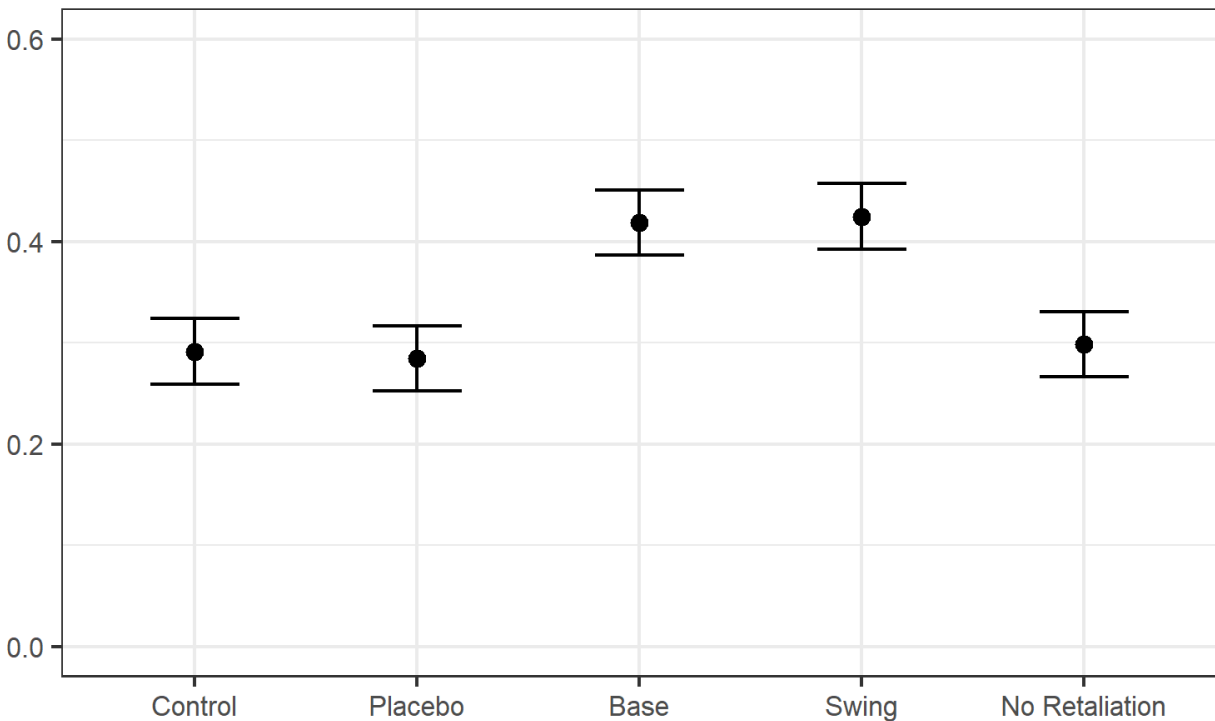|	Worried of Election Interference		Feeling Towards EU	
	(1)	(2)	(3)	(4)
Placebo	−0.004	−0.010	0.005	−0.050
	(0.023)	(0.037)	(0.044)	(0.070)
Swing	0.131***	0.089**	−0.053	−0.024
	(0.023)	(0.037)	(0.044)	(0.071)
Base	0.120***	0.087**	−0.100**	−0.057
	(0.023)	(0.038)	(0.044)	(0.072)
Independent	−0.016	−0.019	−0.380***	−0.405***
	(0.020)	(0.040)	(0.038)	(0.076)
Republican	0.196***	0.132***	−0.572***	−0.539***
	(0.021)	(0.040)	(0.039)	(0.076)
Male	0.039**	0.038**	0.032	0.035
	(0.017)	(0.017)	(0.032)	(0.032)
Working	0.047**	0.046**	0.082**	0.083**
	(0.018)	(0.018)	(0.035)	(0.035)
White	−0.063***	−0.061**	−0.016	−0.016
	(0.024)	(0.024)	(0.046)	(0.046)
Black	0.036	0.036	−0.097	−0.097
	(0.032)	(0.032)	(0.061)	(0.061)
Income	0.015***	0.015***	0.018**	0.019**
	(0.004)	(0.004)	(0.008)	(0.008)
Age	−0.001**	−0.001**	−0.005***	−0.005***
	(0.001)	(0.001)	(0.001)	(0.001)
No College	0.051**	0.052***	−0.129***	−0.129***
	(0.020)	(0.020)	(0.038)	(0.038)
Placebo × Independent		−0.025		0.066
		(0.056)		(0.106)
Placebo × Republican		0.050		0.118
		(0.056)		(0.107)
Swing × Independent		0.016		0.056
		(0.057)		(0.107)
Swing × Republican		0.119**		−0.141
		(0.056)		(0.106)
Base × Independent		0.022		−0.025
		(0.057)		(0.107)
Base × Republican		0.087		−0.106
		(0.056)		(0.106)
Constant	0.236***	0.257***	0.686***	0.676***
	(0.038)	(0.042)	(0.073)	(0.079)
Observations	3,171	3,171	3,154	3,154
R^2	0.074	0.076	0.095	0.098
Note:				*p<0.1; **p<0.05; ***p<0.01

election." This meant that the variable of interest, which specifically mentioned retaliatory tariffs, was not well-aligned with the no-retaliation treatment, so it is omitted from the main analysis of our study.

To be thorough, though, we replicate the above analyses using this alternative condition without retaliation as the baseline, rather than the retaliation condition. The advantage of using the No Retaliation treatment as the baseline, is that we can evaluate whether non-targeted trade retaliation (the Control condition) generates higher concerns about election interference than the No Retaliation treatment. As shown in Figure C.1, there is not a significant difference in worries about election interference between the Retaliation and No Retaliation conditions, which gives us greater confidence that the main results are driven by PTTR, and not retaliation in general.

Figure C.1: Politically Targeted Trade Retaliation Perceived as Election Interference, with No Retaliation Treatment

The figure shows the proportion of respondents in each condition who are somewhat or strongly worried the European Union's retaliatory tariffs are an attempt to interfere with the upcoming US Presidential election. Lines show 95 percent confidence intervals. This figure includes the No Retaliation treatment.
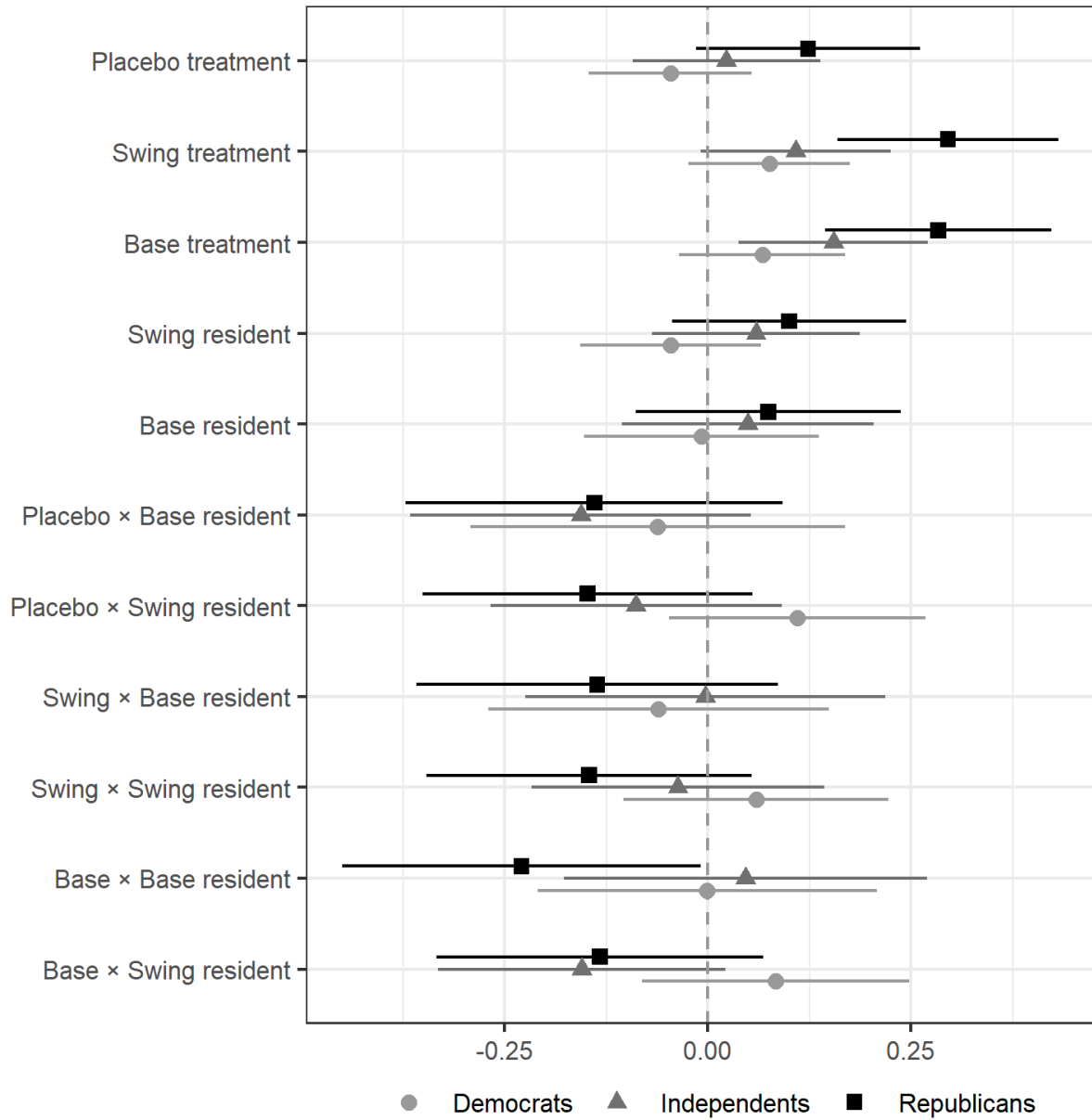
C.3 Residency interactions and power analysis

Figure C.2 shows the results where we interact each of the treatments with whether the respondent lived in a swing state or base state. We split the sample by party identification and then plotted the effects of each treatment, swing/base, and their interactions, by party. We coded swing states as those whose 2016 election margin was within 6% (Arizona, Colorado, Florida, Georgia, Maine, Michigan, Minnesota, Nevada, New Hampshire, North Carolina, Pennsylvania, Virginia, and Wisconsin). We coded base states as those that Trump won by 10% or more in 2016 (Alabama, Alaska, Arkansas, Idaho, Indiana, Kansas, Kentucky, Louisiana, Mississippi, Missouri, Montana, Nebraska, North Dakota, Oklahoma, South Carolina, South Dakota, Tennessee, West Virginia, Wyoming). In general, we do not find differences across party, treatment, and state. Republicans living in base states reacted with less worry about election interference to the Base treatment, compared to Republicans living in states that were neither base nor swing states, i.e. states that voted more Democratic.

Table C.2: Number of observations across treatments, residency state, and partisanship

| Residency | Party | Treatment | | | | Total |
		Control	Base	Swing	Placebo	
Base	Democrat	51	47	45	30	173
Base	Independent	46	39	41	55	181
Base	Republican	58	71	63	50	242
Swing	Democrat	110	88	89	110	397
Swing	Independent	85	89	80	78	332
Swing	Republican	90	89	86	78	343
Other	Democrat	163	149	165	161	638
Other	Independent	104	123	122	128	477
Other	Republican	90	104	116	110	420
Total		797	799	807	800	3203

While the triple interaction among residency state, partisanship, and treatment is theoretically of interest, splitting our sample in this way results in $3 \times 3 \times 4 = 36$ individual cells. Any resulting

Figure C.2: Effect of residency state on worries of election interference

The figure shows the interaction of state of residency with treatment on worries of election interference. There is a statistically significant and negative effect for Republicans living in base states exposed to the base treatment.

analysis is likely significantly under-powered, and so we do not speculate about the effects of such interactions. Note that the sample size in Table C.2 does not equal that in the main analysis as some respondents declined to respond to the question which asked for their partisan identification.

To conduct power analysis, we used the approach described in Blair et al. (2019). We supposed that we had an even simpler survey design than that used here. We considered a design with only two treatments, a control group and a swing treatment. We then supposed that we wanted to detect an interaction effect between living in a swing state and the swing state treatment. We assumed that one third of respondents lived in a swing state.

We then calculated the sample size necessary to detect an interaction term between living in a swing state and the swing state treatment (successfully reject the null of equivalent effects, with at least 80% probability). Each colored line in Figure C.3 corresponds to a different "true" size for the interaction effect. The plot then shows the power to detect that particular interaction term effect as the sample size changes. If the interaction term were -0.5, then we would need a sample size of at least 500 to achieve 80% power.
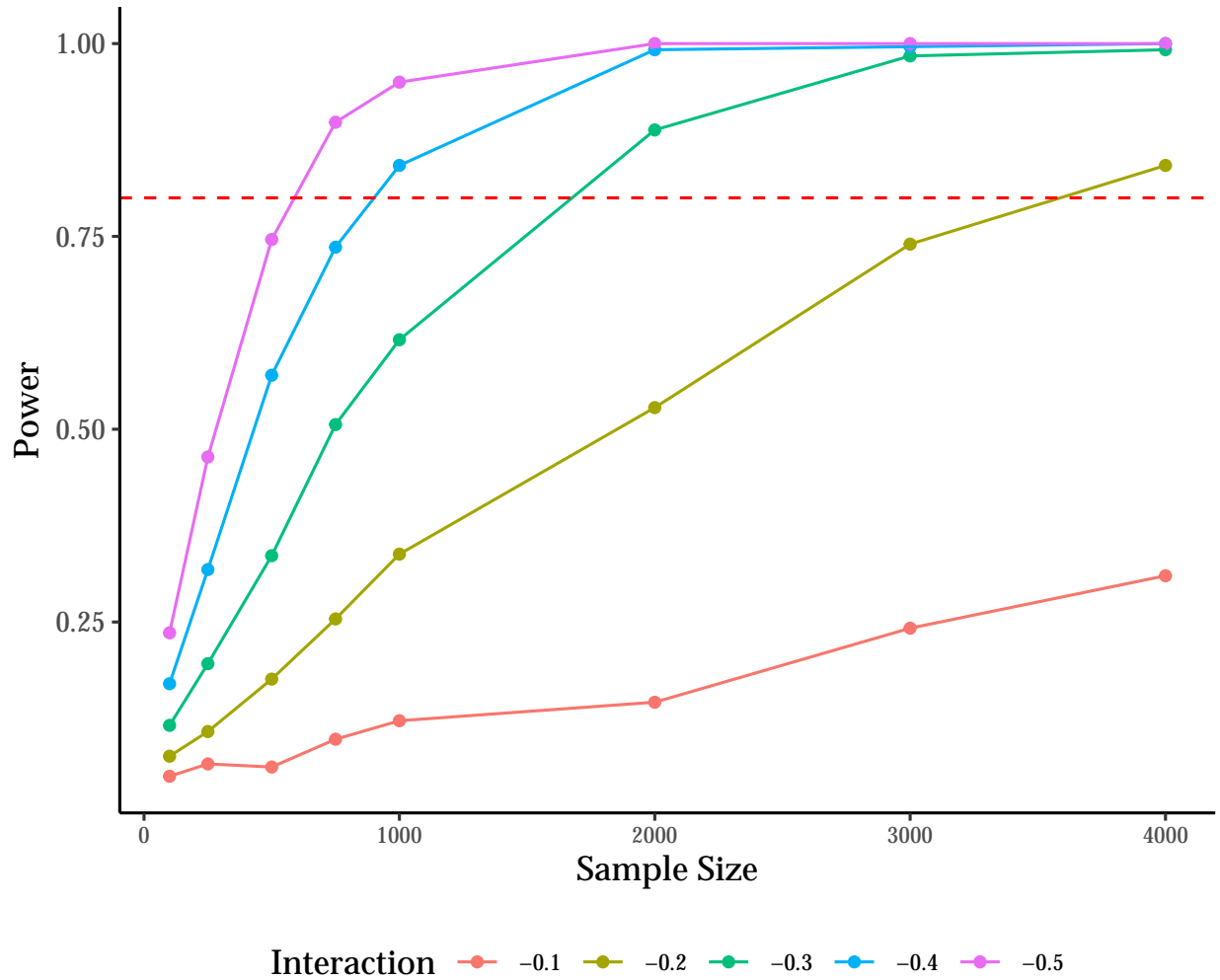
What effect size is reasonable? To benchmark, we used our estimated interaction term effect size for Republicans $\times$ Swing treatment, from Figure 4. There, we estimated that the interaction term between Republican and Swing treatment was 0.13. This is a generous (non-conservative) way to benchmark our power analyses, because this was one of the largest and the only statistically significant interaction term effect we found for the partisan analyses.

If the "true" effect size for the swing treatment and swing state residency interaction term were similar, then we would need a very large sample to achieve 80% power. The green and orange lines at the bottom of Figure C.3 show how weakly power increases with sample size at that treatment effect size.

C.4   EU Continuous Thermometer

The main manuscript used a trichotomous measure of feelings towards the EU. Here, we replicate the regression used to make Figure 5, only we use the 100 point continuous scale as the outcome

Figure C.3: Power analysis

The lines correspond to different sized interaction term effects, for the interaction between an indicator for swing state residents and a swing state treatment indicator.

variable. Column 1 shows results without party interaction terms; Column 2 includes them. Results are similar. The Base treatment still has a negative effect, though its statistical significance decreases to $p < 0.1$. We again do not find significant interactions with party identification.

Table C.3: Attitude towards EU (0 to 100 feeling thermometer)

	0–100 Feeling Thermometer	
	(1)	(2)
Placebo treatment	1.061	0.410
	(1.240)	(1.902)
Swing treatment	−1.165	0.025
	(1.240)	(1.907)
Base treatment	−2.160*	−1.143
	(1.240)	(1.935)
Independent		−14.968***
		(2.037)
Republican		−15.582***
		(2.029)
Placebo × Independent		3.218
		(2.862)
Placebo × Republican		−0.516
		(2.892)
Swing × Independent		3.345
		(2.897)
Swing × Republican		−5.085*
		(2.850)
Base × Independent		2.460
		(2.899)
Base × Republican		−3.433
		(2.875)
Constant	54.896***	64.096***
	(0.878)	(1.321)
Observations	3,233	3,183
R^2	0.002	0.100
Note:	*p<0.1; **p<0.05; ***p<0.01	

C.5 Analysis Excluding "Neither agree/disagree"

Table C.4 replicates the main analysis, only it excludes respondents who answered "neither agree nor disagree" for the question about whether they worried about election interference. Results are

again similar to the main analysis, with no sign or significance changes pertaining to the main arguments above.

Table C.4: Effect of treatment on worries of election interference, dropping neither agree/disagree

	Worried about election interference	
	(1)	(2)
Placebo treatment	0.012	−0.022
	(0.029)	(0.045)
Swing treatment	0.205***	0.132***
	(0.029)	(0.046)
Base treatment	0.176***	0.127***
	(0.029)	(0.046)
Independent		−0.017
		(0.049)
Republican		0.147***
		(0.048)
Placebo × Independent		0.029
		(0.071)
Placebo × Republican		0.080
		(0.069)
Swing × Independent		0.069
		(0.072)
Swing × Republican		0.129*
		(0.068)
Base × Independent		0.056
		(0.071)
Base × Republican		0.075
		(0.068)
Constant	0.413***	0.371***
	(0.021)	(0.032)
Observations	2,256	2,227
R^2	0.034	0.075
Note:	*p<0.1; **p<0.05; ***p<0.01	