

**The Political Consequences of the US-China Trade War:  
Understanding the Chinese Public Reaction\***  
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**I. Introduction**

Since 2017, the American government has levied a series of protectionist measures against a number of its trading partners. This has resulted in retaliation against the US, a rise in trade-related international frictions and most conspicuously a “trade war” with China. As the trade war has dragged on, concerns have deepened that these various measures may have fueled nationalist sentiments and undermined the foundations of the international trading system (Bown and Irwin 2019). This paper examines whether the US’ protectionist actions have affected public support for open trade in target countries.

There are several reasons to expect US protectionism to reduce support free trade. Most intuitively, US protectionism increases support for protectionism in target countries in part through a logic of reciprocity: citizens in foreign countries will want to retaliate against the US by raising tariffs on American goods. In addition, US protectionism may also reduce support for free trade in general by lowering the perceived social or economic benefits of an internationally-oriented economic strategy. On the other hand, US protectionism is also likely to increase individuals’ desire to diversify their country’s economic partnerships, and increase support for

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\* An Appendix containing supplementary information and analyses can be accessed at [https://www.dropbox.com/s/yxkzto3y0lr7upk/Trade\\_War\\_Appendix\\_IPES.pdf?dl=0](https://www.dropbox.com/s/yxkzto3y0lr7upk/Trade_War_Appendix_IPES.pdf?dl=0).

lowering barriers with third-party countries. Moreover, the form that protectionism takes matters. Public support for free trade should remain firmer when US protectionism takes place in the context of multilateral institutions such as the World Trade Organization (WTO) and when it does not discriminate against specific countries.

We use original survey data collected through two survey experiments fielded in China in 2019 to examine the impact of US protectionism on public support for free trade. It is obviously not possible for researchers to manipulate US trade policy. Instead, we randomly assign some survey respondents to be reminded about certain aspects of US policies. Doing so enables us to test whether priming individuals about US protectionism alters support for an open international economy. The experiments also allow us to examine if the type and context of US protectionism influences attitudes towards free trade.

We focus on Chinese public opinion for several reasons. First, the US-China trading relationship is arguably the most important one in the world, with bilateral trading volumes amounting to over US\$600 billion in 2017 (World Integrated Trade Solution (WITS)). While the US government has enacted protectionist measures against a number of countries, its most concerted actions have been targeted at China, leading China to respond with its own set of restrictions. These bilateral trade frictions have generated spillovers in multiple dimensions, from the shifting of global supply chains to shocks in international stock markets, and even fears of a global recession (Cassella 2019).

Second, China's policy response to the trade war seems to be at least partially influenced by public attitudes on this issue. A growing body of research shows that public opinion plays a significant role in shaping the foreign policies of authoritarian regimes (Weeks 2008, 2012). Recent research has further drawn attention to the Chinese government's responsiveness to

public sentiments (Chen, Pan, and Xu 2016; Distelhorst and Hou 2017), including in the realm of foreign policy (Weiss 2014; Zhao 2013). China's top leaders themselves emphasize the importance of public opinion: for example, in a 2013 speech to the Central Committee, Xi Jinping asserted that "winning or losing public support is an issue that concerns the CPC's survival or extinction" (quoted in Weiss 2019, 679). In fact, China's central government requested input from the public on how it should respond to Trump's tariff threats (Ministry of Commerce 2018). China's leadership subsequently justified its decision to retaliate with tariffs based on the fact that "it had Chinese public opinion on its side" (Buckley 2018). The Chinese governments' extensive effort to censor news about the trade war further illustrates their concern with public opinion on this issue (Gan 2019).

Our survey experiments provide robust evidence that US protectionist actions led to a decline in Chinese public support for international economic cooperation. Primes about America's protectionist trade policies strongly reduced support for free trade in both survey experiments. Our treatments reduced average support for free trade by around two-thirds of a point on an 11-point scale in the first experiment and by roughly three-quarters of a point on that scale in the second experiment. We also find some evidence that people care about the international context in which protectionism takes place: reminders about China's WTO commitments can limit the degree to which US protectionism increasing general protectionist sentiment. These results suggest that US protectionism threatens to erode support for an open international economy in key trading partners.

Consistent with previous research on the importance of reciprocity, we find that priming individuals about US protectionism increases the desired level of trade barriers vis-à-vis the US specifically. However, using causal mediation methods, we show that this decline in support for

open trade with the US accounts for only a small part (less than 20%) of the effect of US protectionism on reduced support for open trade in general. We also find that US protectionism has an additional effect in *raising* support for trade with third-party countries — particularly when respondents are informed that US protectionism is disproportionately targeted at China. These patterns suggest that US protectionism influences public support for trade in target countries through multiple competing channels.

Next, we provide two forms of external validation for our main finding that US protectionism lowers the Chinese public’s support for free trade. First, we replicate the main findings in two survey experiments about attitudes towards high-tech innovation policy, another key component of the current US-China economic conflict. Subjects that were primed about US restrictions on Chinese technology exports were less supportive of international economic cooperation than others. Second, we show that support for free trade fell precipitously—by more than two full points—between the two surveys, a period in which the US ramped up protectionism against China. While it is not possible to isolate the effect of US protectionism from other over-time changes, this pattern is highly suggestive that our experimental primes and real-world policy changes have consistent effects on citizens’ attitudes.

Lastly, we show that the US-China trade war has had an important impact in domestic Chinese politics. We demonstrate that average citizens’ satisfaction with China’s central government was substantially *lower* in July/August 2019 than in April 2019. The decline in support for the central government is sharpest among individuals that are most supportive of free trade and those who live in trade-dependent regions. This indicates that the US-China trade war is an issue of considerable importance to many ordinary Chinese citizens, and highlights the limits to the regime’s use of nationalist propaganda to shore up public support. While US

protectionism does not really threaten the Communist Party's survival, it seems to have put a dent in its popularity, at least among some segments of the public.

## **II. Theory**

The enactment of protectionist policies is likely to reduce public support for free trade in target countries. We theorize three mechanisms through which increases in trade barriers by foreign countries influences trade-policy attitudes by citizens at home. The first reason is related to concerns about “reciprocity.” Individuals become less supportive of cooperation with countries that do not themselves cooperate. Second, protectionism abroad might increase support for “economic nationalism” more generally. When other countries are protectionist, citizens might infer that an internationally-oriented economic strategy is riskier or less legitimate, which reduces support for open trade not just with the US specifically but on a global basis. The third mechanism—the desire for trade “diversification”—works in the opposite direction. When one of your major trading partners grows more protectionist, the desire to seek economic opportunities with third countries, and to liberalize trade with those countries, should increase. We also expect responses to protectionism to be influenced by the form that protectionist policies take, such as whether protectionism takes place within the context of international rules and the degree to which protectionist policies are applied in a discriminatory fashion.

A large previous literature in international relations establishes the importance of reciprocity in either engendering or unraveling international cooperation. As a core principle in international trading rules, reciprocity has fostered cooperation among nations in an otherwise anarchic world (Bagwell and Staiger 2002; Keohane 1986; Rhodes 1989). At the individual level, a growing body of research shows that public opinion on international relations is shaped

by behavior of other countries. Chilton, Milner, and Tingley (2017) show that individuals are more supportive of inward foreign direct investment from countries that themselves permit investors from the respondent's country. Other studies of individual public opinion find that concerns about reciprocity can shape support for action on climate change (Bechtel and Scheve 2013; Tingley and Tomz 2014), preferences regarding the treatment of prisoners of war (Chu 2019), and support for international cooperation more generally (Kertzer et al. 2014; Kertzer and Rathbun 2015).

Based on this body of work, there are strong grounds to expect US protectionism to increase Chinese citizens' desire to increase trade barriers against the US. Individuals might consider a retaliatory reaction a necessary defensive action to demonstrate that economic aggression will not work against them and to maintain a strong bargaining position in the future (Drezner 2019). In addition, if the imposition of trade barriers is interpreted as a hostile action against the nation, individuals may believe that it necessitates an intransigent response (e.g., Gruffydd-Jones 2019). Here, responding in kind with protectionist measures is seen as necessary for defending the sovereignty or status of one's own nation. Other things being equal, increased support for protectionism against the US should, in turn, increase support for protectionist trade policy overall.

While previous work gives us good reason to expect that protectionism abroad will generate a reciprocal decline in domestic public support for trade with the protectionist country, we argue that foreign-country protectionism can also reduce support for free trade in general for reasons that are orthogonal to peoples' views about dyadic trade relations. Put simply, increases in foreign countries' trade barriers might increase domestic support for "economic nationalism." There are several reasons to expect US protectionism to lower support for open trade with *all*

trading partners. First, when a systemically important state adopts protectionist measures, economic development strategies that are centered around global economic integration will rightly be perceived as riskier because they leave the country vulnerable to the whims of foreign governments. Hence, the expected economic gains from trade will be lower and the perceived need to turn towards domestic firms and markets to reduce reliance on a fickle global trading system will be greater. Second, foreign countries' protectionism may also reduce support for the liberal economic order for normative or identity-based reasons. Protectionist policies might be viewed as an erosion of existing global rules and norms, raising perceptions that free trade policies are no longer legitimate and should not be followed anymore. Similarly, individuals might view the adoption of protectionist policies in other countries as a signal that trade barriers are an appropriate and effective policy that their government should copy (Linos 2013). For these reasons, protectionism in foreign countries shifts peoples' views about the desirability of economic integration.

On the other hand, there is one channel through which increased trade barriers in foreign countries might actually *increase* support for open trade. When facing increased trade barriers from a major trading partner, individuals might consider it necessary to manage this loss of market opportunities by finding new ones, and therefore seek to lower barriers to trade with third countries. This "diversification" motivation helps temper the overall protectionist response. In principle, it is possible that diversification concerns will cancel out, or even overpower, the two previous considerations. But while we expect the desire to diversify trading relations to mitigate the rise in protectionist sentiment, it seems more likely that the other two channels will dominate and US protectionism will increase support for protectionism on net.

Additionally, the extent to which foreign protectionism erodes public support for free trade should also depend on *how* those protectionist policies are enacted. One potentially important consideration is whether that protectionism is adopted unilaterally or whether it is pursued in the context of official multilateral institutions governing trade, such as the WTO. As emerging research indicates, public opinion on international affairs is affected by whether or not cooperation takes place through international agreements and organizations (Brutger and Li 2019; Gray and Hicks 2014). Being reminded of one's WTO membership and international rules could therefore blunt the impact of protectionism in foreign countries on support for free trade at home, either by raising the economic and reputational costs of imposing retaliatory tariffs, or reinforcing the continued value and legitimacy of the international trading system.

Individual responses to protectionism might also vary if trade barriers are raised only on your country in a targeted and discriminatory manner compared to when foreign countries indiscriminately raise tariffs against all countries. Individuals are likely to view targeted forms of protection against their country as particularly hostile and threatening, intensifying their desire to raise tariff barriers against that country. At the same time, targeted protectionism might also raise public support for trade with third countries. When protectionism is targeted specifically at your country, individuals are likely to conclude that the protectionist country has no desire to trade with you, thus strengthening the perceived need to diversify one's trading relations and minimize the risks of economic disruptions caused by the protectionist country. Discriminatory protection might also raise the desire to defend the national pride of one's country. In this scenario, increased trade with other countries is valued in order to demonstrate that one's own country has not been isolated and that it in fact has many other "friends" in the international community.

To summarize, our key argument is that the adoption of protectionist policies in foreign countries reduces support for free trade. When a foreign country increases trade barriers, citizens are likely to change which countries they want to trade with—increasing support for free trade with third-party countries and lowering support for free trade with the protectionist country—while also lowering support for trade in general. We also expect the strength of the public response to depend on the form of protectionism, such as whether protection occurs in the WTO context and whether it is discriminatory in nature. The next sections of the paper outline how we test these propositions, and then present our results. Before proceeding to the empirical analysis, one key scope condition for our argument is worth noting. The public is likely to react more strongly when the foreign country engaging in protectionist behavior is a major trading partner and plays an important role in the global economy than when the foreign country is a minor player in the world trading system.

### **III. Research Design**

We use survey experiments to explore whether and how foreign states' policies influence individual attitudes about international trade policy. The experiments varied the amount and type of information that subjects received about US trade policy (among other factors, such as the legality of retaliatory tariffs under WTO rules). All of the informational primes were based on actual circumstances and real policies or actions adopted by the US. Doing so allows us to assess whether priming citizens to focus on one dimension of the policy issue over another changes their policy preferences.

The two surveys were fielded in very different contexts. The first was conducted in April 2019 while the second one was fielded in July and August of 2019. In April, US-China

economic relations were on the mend and bilateral negotiations to sign an agreement resolving the conflict were ongoing. Sino-US economic relations abruptly changed for the worse on May 5<sup>th</sup>, when negotiations broke down and US President Donald Trump raised tariffs from 10% to 25% on of China's exports to America and threatened a 25% tariff on an expanded list of exports. When these tariffs went into effect on June 1<sup>st</sup>, the average American tariff on imports of Chinese goods increased from 12% to 17.6%, which represents the largest US tariff increase, in percentage-point terms, in the US-China trade war thus far (Bown 2019). This was followed by the US announcement on May 16 to place Chinese telecommunications juggernaut Huawei on the "entity list," which effectively prohibited American businesses from dealing with the firm. China responded to these actions in a retaliatory fashion, raising its own tariffs that had already been placed on about \$30-60 billion worth of imports from the US. China additionally created its own "unreliable entity" list on foreign companies that posed a national security threat to China.<sup>1</sup>

The amount and content of Chinese media coverage of the trade war also differed between the two periods. In the first four months of the year, the *People's Daily* newspaper, the official Communist Party mouthpiece, ran just four stories with the terms "trade" or "tariff" in the title. In the next four months (May-August), there were 84 such articles. In terms of content, most of the articles in the initial months unabashedly supported free trade. By July and August, however, official coverage increasingly supported a more balanced approach to trade policy, one that advocated for protectionist retaliation, though this was consistently paired with expressions of reluctance to close up the economy and a continued emphasis on the general virtues of free trade (see Appendix A for more details). The dramatically different policy context and information environment that survey respondents faced across the two surveys is useful because

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<sup>1</sup> The timeline and background to this trade conflict is well-summarized elsewhere and thus will not be covered in detail in this paper. For one such background source, see <https://www.china-briefing.com/news/the-us-china-trade-war-a-timeline/>.

it implies that any findings that are consistent between the two surveys do not hinge on these contextual features.

The surveys were completed online using convenience samples. Subjects were recruited using a Chinese crowd-sourcing service that operates in similar fashion to Amazon's Mechanical Turk but with a narrower focus on survey research. This strategy allowed us to reach a large pool of potential respondents, which would have been cost-prohibitive using traditional sampling methods. In all, we reached around 3000 respondents from across the country for each survey. Overall the sample is younger and better educated than the average citizen. Yet, the "netizens" we sample are a politically important subset of China's population. This is precisely the population the Chinese government's online public opinion monitors are targeting in their own research (Denyer 2013). Moreover, a recent study of the emerging trend towards Internet recruitment in China shows that online convenience samples generate attitude estimates that are highly consistent with national probability samples (Li, Shi, and Zhu 2018).

One challenge with using online samples is the inattentiveness of respondents (Harden et al. 2019). To alleviate this concern, we follow Gueorguiev et al. (2019) and drop all subjects that completed the survey in less than five minutes.<sup>2</sup> Respondents that completed the survey at that speed were likely paying limited attention to the questions. Importantly, however, none of the findings presented below hinge on this choice. As we show in Appendix B, the results are similar (though slightly noisier) if we include all observations in our analyses or if we use a lower threshold for excluding observations, while even higher thresholds produce slightly larger treatment effects. In the following sections, we describe our experimental designs in greater detail and present the main results from these experiments.

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<sup>2</sup> This solution is very similar to Harden et al.'s (2019) proposal to exclude observations that spend insufficient time reading the experimental vignette itself. Since our experiment does not take long to read even for attentive respondents, it is more suitable in this context to focus on the total time respondents spend on the survey.

## **IV. Main Results**

### *Experiment 1*

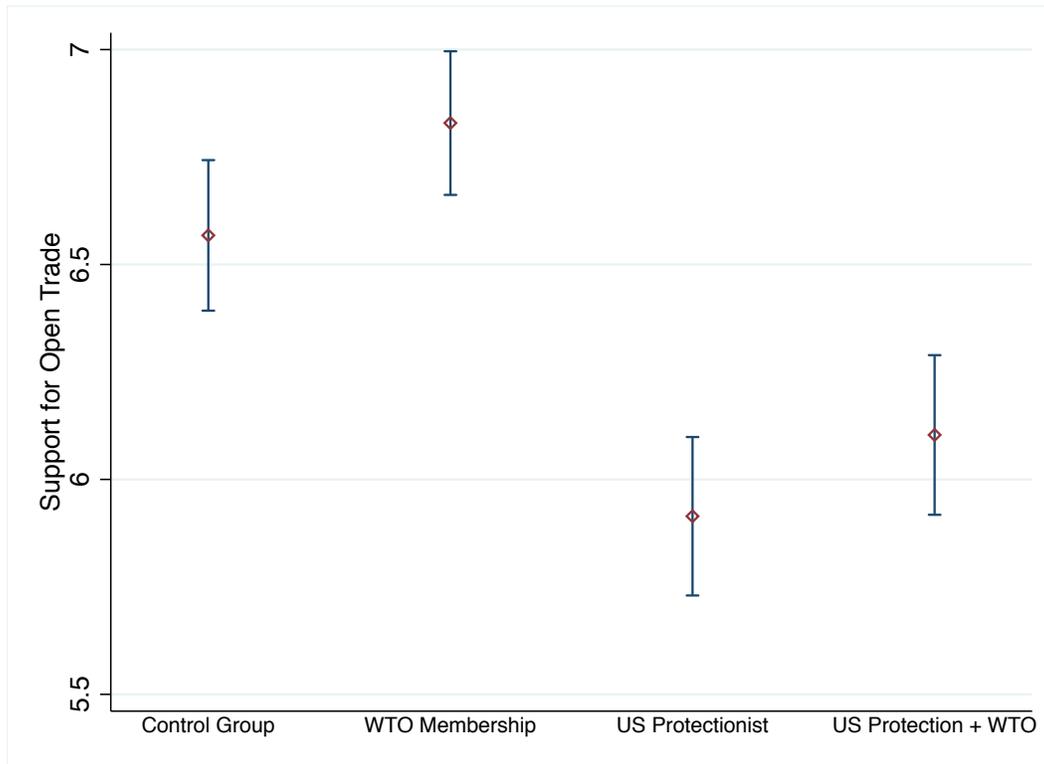
Our first survey experiment asked subjects what they think “China should do with its international trade policy.” The response options are based on a sliding scale with eleven categories, ranging from “increase trade barriers such as tariffs a lot” on one end to “decrease trade barriers such as tariffs a lot” on the other end. Responses are coded so that higher values indicate more support for open trade.

There are four experimental conditions. The control group was simply asked about trade policy using the language mentioned above. A second group also received a “US protectionist” prime, which stated that “The United States has increased trade barriers such as tariffs on many foreign imports this year.” A third group was primed about China’s international legal commitments in the WTO. Prior to being asked about their views about trade, the script for this group stated that China is “a member of the World trade Organization, an international institution dedicated to promoting open trade”. The fourth treatment combines the information of the previous two treatments into one.

Figure 1 displays mean levels of support for open trade, along with 95% confidence intervals, for the four groups. The typical respondent in control group is supportive of open trade, with a mean of 6.6 and a mode of 7 on a zero-to-ten scale, where 5 indicates support for neither increasing nor decreasing trade barriers. Subjects that were reminded about China’s membership in the WTO expressed modestly stronger support for trade, on average, than those in the control group, a difference of about a quarter of a point and one that is statistically significant

( $p < 0.05$ ). This indicates that Chinese netizens do, in fact, care about the country's international commitments.

Figure 1: Support for Open Trade (Experiment 1)



The effect of the “US protectionist” treatment strongly reduces support for open trade. Average support for trade in this group was slightly below 6.0, or two-thirds of a point below the average in the control group, a large and statistically significant difference ( $p < 0.01$ ). Primes about US trade barriers substantially reduces popular support for open trade in China.

The final column shows that information about US protectionism outweighs the impact of information about WTO membership. Among those that received this combined treatment, average support for trade was significantly lower than both the WTO treatment group and the control group ( $p < 0.01$ ). And while support for open trade was slightly higher in this fourth

group than among those that were informed about US protectionism but not the WTO, the difference between these groups is not statistically significant ( $p = 0.156$ ). Thus, WTO commitments appear to be useful in creating support for open trade in China, though this effect is more ambiguous in the face of violations by major trade partners. Overall, then, the first experiment provides some support for the hypothesis that WTO commitments can increase support for free trade and robust evidence that US protectionism lowers support for free trade.

### *Experiment 2*

Our follow-up experiment had two main objectives. The first purpose is to determine if primes about US protectionism have similar effects in this different policy and information environment. The second objective is to generate a more precise understanding of what aspects of US protectionism are driving Chinese citizens' responses, and determine whether US protectionism increases support for protectionist policies against all countries or if protectionist sentiment is more narrowly focused on the US.

The second survey included an identical question about support for open trade, which asked individuals what they think China should do with its international trade policy. The experimental conditions in this survey seek to determine whether protectionist impulses are more or less affected by US protectionism that targets numerous countries versus US protectionism that raises barriers against China specifically. To help determine which of these two possible motives is more salient, the second experiment includes two separate treatments, one that describes US protectionism as indiscriminately protectionist and one that describes protectionism as targeted at China. The “indiscriminate protection” treatment notes that the “United States has increased barriers such as tariffs on many foreign imports this year, including imports from all its

major trading partners (Canada, Mexico, the European Union and China)”. By contrast, the “targeted protection” treatment states that the “United States has increased trade barriers such as tariffs on Chinese imports this year, more than for any other country. At the same time, the United States has canceled tariff increases on other countries.” Crucially, while the two statements emphasize contrasting aspects of US policy, both are factually accurate; the US has, indeed, increased tariffs on all its major trading partners but it has also increased these barriers on Chinese imports more than for any other country.<sup>3</sup>

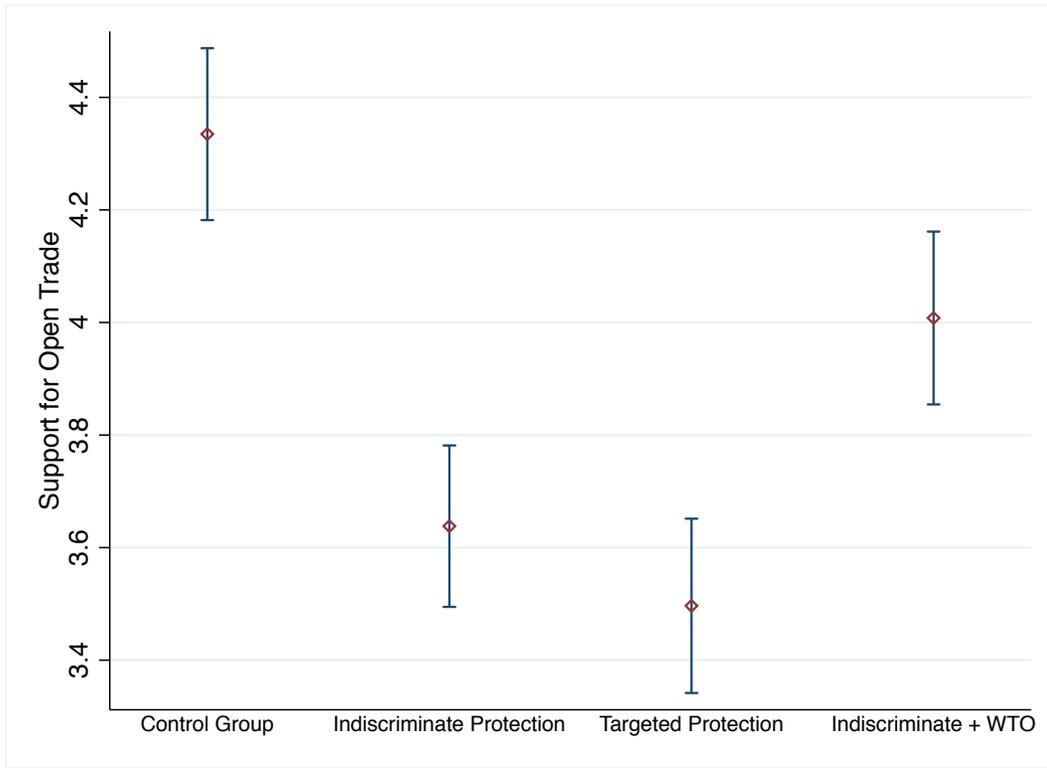
In addition to these two experimental conditions, this experiment also contains a control group that simply asks what China should do with its international trade policy, as well as a fourth condition, which combined the information in the “Indiscriminate Protection” treatment with the following prime about China’s legal commitments at the WTO: “Countries that also increase their own tariffs would violate WTO rules (the WTO is an international institution dedicated to promoting open trade)”.

Figure 2 presents the means and 95% confidence intervals across the four experimental conditions. The first finding to note is that support for open trade is far lower in this second survey, fielded in July/August 2018 compared to one fielded just a few months earlier in April. The difference is about 2 points on an eleven-point scale. This likely reflects the fact that trade tensions with the United States heated up considerably during the interim few months, and the Chinese media started to advocate for a tougher position in the conflict starting around May. We return to this issue in Section V below.

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<sup>3</sup> Examples of non-targeted trade barriers include the global safeguard tariffs on solar panels and washing machine imports, which affected a number of nations including South Korea and China in 2017, and higher tariffs on steel and aluminum imports against all trading partners in March 2018. At the same time, the US government has levied a series of targeted tariffs and tariff hikes specifically on Chinese goods. The language about canceled tariffs on other countries is an allusion to the US decision to exempt the EU, Mexico, Canada, South Korea and others from steel and aluminum tariffs.

Figure 2: Support for Open Trade (Experiment 2)



Despite these important differences in the political context and baseline attitudinal differences, the main results closely mirror those in the first survey. Support for open trade is lower in all three treatment groups, each of which mentions US protectionism, compared to the control group ( $p < 0.01$  in all cases). These effects remain large. Average support for trade is 0.7 lower in the “Indiscriminate Protection” treatment compared to the control group.

Average support for open trade is even lower in the “Targeted Protection” treatment (mean = 3.50) compared to the “Indiscriminate Protection” treatment (mean = 3.62). This difference, however, is not quite statistically significant ( $p = 0.19$ ). This suggests that US protectionism may not need to target China to induce a protectionist response.

This experiment also shows that the WTO defuses protectionist attitudes about trade policy. Once again, the effects of US protectionism dominate the effect of WTO, as mean support for trade in this composite treatment group is lower than the mean in the control group. At the same time, average support for open trade is 0.4 higher among those that were told about US protectionism and WTO membership than among those that were only told about US protectionism ( $p < 0.01$ ). This echoes the finding in the first survey that the WTO increases support for open trade, but the combined treatment was not significantly different from the US protectionist treatment in the first experiment. One possible explanation for the stronger results in this case is that the second experiment specifically highlighted that higher tariffs would violate WTO rules whereas the first experiment only mentioned that the WTO is dedicated to promoting open trade. It is plausible that legal commitments are viewed as a better reason to not retaliate than simply general principles of an organization.

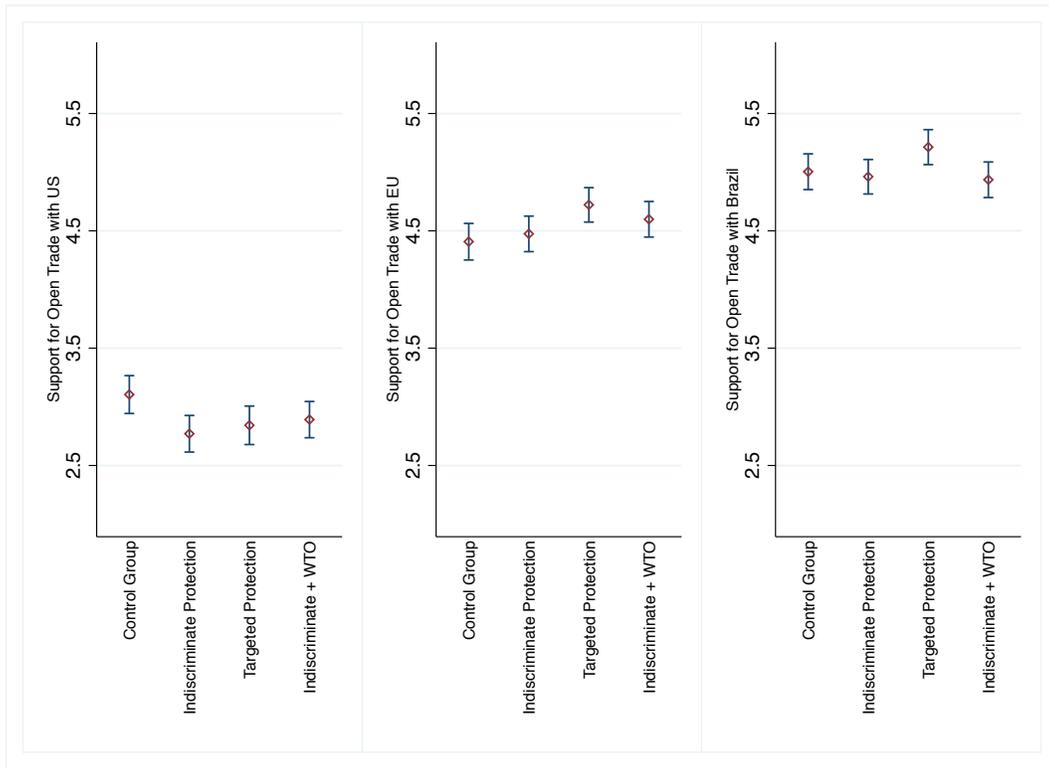
#### *Attitudes towards Trade with Specific Countries*

In the second trade experiment, immediately following the main questions about respondents' overall support for trade, we included follow-up questions that asked about trade policy towards specific partner countries. The purpose is to determine whether US protectionism leads people to favor protectionism against all countries or only against the United States. The survey focused on three of China's top trade partners, the United States, European Union, and Brazil. We include the EU to compare attitudes about trade with another developed economy that has not increase tariffs on Chinese goods, and Brazil to see if attitudes towards trade with emerging economies are distinct.

Figure 3 presents average attitudes for open trade with the three different partners, along with 95% confidence intervals, split by experimental condition. For respondents in the control

group, the average respondent wants much stronger trade barriers vis-à-vis the US than the other two trading partners. Although the differences are more minor, the average respondent expresses more support for cooperating on trade with Brazil than with the EU.

Figure 3: Country-Specific Responses



The left-hand panel of Figure 3 shows that the experimental treatments reduce support for open trade with the US. Average levels of support for open trade with the US are significantly lower in both protectionist treatment groups in comparison to the control group ( $p < 0.05$ ). Interestingly, however, the effects of these treatments on support for trade with the US are smaller than they were for support for overall trade. The “Indiscriminate Protection” and “Targeted Protection” treatments reduce support for trade with the US by -0.3 and -0.26,

respectively, which is equivalent to about one-tenth of a standard deviation of that outcome. By contrast, these treatments decrease support for general trade by 0.7 and 0.84, which represents one-third of a standard deviation of that variable.

As was the case for support for trade overall, average support for trade with the US differs little between the targeted protection and indiscriminate protection conditions. We also obtain somewhat ambiguous results regarding the role of WTO violations. Mean levels of support for free trade differ little between the indiscriminate protection treatment and the treatment that also references China's WTO commitments. And while average support for trade in combined "Indiscriminate Protection + WTO" treatment is lower than the control group, the difference is only marginally significant ( $p < 0.1$ ). While highlighting international legal commitments may increase the desire for open trade in general, this may be less relevant for policy directed at countries that themselves are violating their legal commitments.

The middle and right-hand panels of Figure 3 demonstrate that American protectionism can *increase* the desire to remove trade barriers against third parties. For both the EU and Brazil, the difference in trade policy attitudes between the control group and indiscriminate protection condition are negligible and statistically insignificant. However, average levels of support for openness towards the EU and Brazil are highest in the targeted protection group. For trade with the EU, the difference between this condition and the control group is substantial for trade with the EU (mean difference = 0.31) and strongly significant ( $p < 0.01$ ). The effect is a bit smaller for trade with Brazil (mean difference = 0.21), though the effect is still close to statistically significant at the 95% confidence level ( $p = 0.054$ ). For both Brazil and the EU, the difference between the indiscriminate protection and targeted protection treatments are fairly large as well, about a quarter point in each case, and statistically significant at the 95% confidence level. This

evidence suggests that the perceived need to diversify one's trade is greater when your main trading partner is seeking to break ties with your country specifically. It also indicates that protectionism can have a bifurcated impact on public opinion, reducing support for economic cooperation with some countries, and raising support for free trade with others.

### *Testing the Reciprocity Mechanism*

This section uses causal mediation analysis to determine how much of the increased support for protectionism is driven by increased support for trade barriers with the US specifically. This approach decomposes the “total effect” of the experimental treatments on overall trade attitudes into two components. The “causal mediation effect” refers to the effect that is accounted for by a mediator variable, in this case attitudes about trade with the US. The “direct effect” is the remaining effect that consists of all other potential channels through which the treatments influence support for open trade (see Imai et al. 2011 for more details). Our theoretical expectation is that the reciprocity channel, as captured by attitudes for trade with the US, is one channel through which the treatments reduce overall support for free trade, but they are not the only mechanism driving this response. Our argument implies that both the mediation effect and the direct effect should be statistically significant. By contrast, if US protectionism only reduces support for free trade through a reciprocity mechanism, the causal mediation effect should be close in size to the total effect and the magnitude of the direct effect should be negligible.

The top panel of Table 1 presents the main results of the causal mediation analysis using *Support for Open Trade with US* as the mediator. The total effects of -0.7 and -0.8 for the “Indiscriminate Protection” and “Targeted Protection” treatments, respectively, indicate that the treatments lower overall support for trade by these quantities, as shown in Figure 2. The

mediation effects of the Indiscriminate Protection and Targeted Protection treatments are indeed statistically significant (the 95% confidence intervals do not include zero). This implies that these treatments reduce overall support for trade in part because they reduce support for trade with the US specifically. But, the mediation effects are fairly small portions of the total effect: 17% for the first treatment and 11% for the second treatment. Reduced support for trade with the US is clearly not the only channel through which US protectionism lowers support for open trade. The large and statistically significant direct effect implies that there are other mechanisms through which the treatments are lowering support for open trade more broadly.

The middle panel of Table 1 conducts the same analysis using support for trade with Europe as the mediator and the bottom panel uses support for trade with Brazil as the mediator. Here, the key finding is that support for trade with these third parties are positive and statistically significant mediators for the “Targeted Protection” treatment. This means that the targeted protection prime increases support for trade with third-parties, which then, other things being equal, contributes to greater support for trade overall. Notably, these positive mediation effects are of a similar magnitude to the size of the negative mediation effect associated with support for open trade with the US. Even though the treatment *lowers* support for open trade, there are some channels through which it *increases* support for open trade.

To summarize, US trade protectionism undermines support for trade with the United States in a reciprocal logic, but this is just one component of the overall impact of protectionism. First, some forms of US protectionism also catalyze support for more openness for other countries. These two effects roughly cancel one another out in terms of their effects on support for free trade overall. Additionally, the existence of a large “direct effect” in Table 1 is evidence

that US protectionism has a broader effect on support for free trade in general that goes beyond the bilateral US-China relationship.

Table 1: Causal Mediation Analysis

<b>Panel A: Trade with US</b>	Indiscriminate Protection	Targeted Protection	Indiscriminate + WTO
Average Causal Mediation Effect	-0.12 [-0.19, -0.04]	-0.09 [-0.17, -0.01]	-0.07 [-0.15, 0.003]
Direct Effect	-0.57 [-0.78, -0.38]	-0.74 [-0.95, -0.54]	-0.24 [-0.45, -0.05]
Total Effect	-0.69 [-0.91, -0.47]	-0.83 [-1.06, -0.61]	-0.32 [-0.54, -0.10]
<b>Panel B: Trade with Europe</b>	Indiscriminate Protection	Targeted Protection	Indiscriminate + WTO
Average Causal Mediation Effect	0.03 [-0.05, 0.12]	0.14 [0.05, 0.23]	0.08 [-0.0005, 0.17]
Direct Effect	-0.72 [-0.92, -0.53]	-0.95 [-1.16, -0.76]	-0.40 [-0.61, -0.21]
Total Effect	-0.68 [-0.91, -0.47]	-0.82 [-1.04, -0.59]	-0.32 [-0.54, -0.10]
<b>Panel C: Trade with Brazil</b>	Indiscriminate Protection	Targeted Protection	Indiscriminate + WTO
Average Causal Mediation Effect	-0.01 [-0.08, 0.06]	0.08 [0.01, 0.16]	-0.02 [-0.09, 0.05]
Direct Effect	-0.68 [-0.89, -0.49]	-0.91 [-1.12, -0.71]	-0.29 [-0.50, -0.10]
Total Effect	-0.70 [-0.92, -0.47]	-0.83 [-1.06, -0.61]	-0.31 [-0.54, -0.10]

Note: Table displays the total, direct, and average causal mediation effect of each treatment on Support for Open Trade, with 95% confidence intervals in brackets. The mediator variables are support for open trade with the US (Panel A), support for open trade with Europe (Panel B), and support for open trade with Brazil (Panel C). Estimation is based on Hicks and Tingley (2011).

## **V. Addressing Potential Threats to Internal and External Validity**

### *Alternative Explanation for Findings*

Are the protectionist responses reported in our findings potentially driven by state propaganda emphasizing nationalism and anti-Americanism, rather than by a “natural” response to US protectionist actions? While the Chinese media may have had some impact on how citizens responded to our treatments, it is unlikely that the responses we observe are entirely driven by state propaganda. First, and most importantly, the treatment effects are very similar across the two experiments despite the fact that the amount and nature of state propaganda varied considerably across our two survey waves, as described earlier and demonstrated in Appendix A. If state propaganda had had a substantial effect in raising protectionist sentiments, we would not expect strong protectionist responses to our tariff treatments in the first survey, when the issue received little media attention and the Party’s official stance was consistently supportive of free trade. However, as shown in the previous section, the treatment effects in the first survey are very close in magnitude to those observed in the second survey.

Second, if propaganda were the main driver of public opinion responses, we would expect treatment effects only among those respondents who consume large quantities of news. We would also expect those that consume more news to express lower baseline levels of support for open trade since the media would have already primed them about the trade war. To test this possibility, we ran a series of regressions that interacted each treatment variable with a measure of self-reported news consumption. The results are presented in Appendix C. While news consumption significantly increases the protectionist response to the targeted protection treatment in our second experiment, the amount of news that individuals consume is not a statistically significant moderator for the other three treatments in the second experiment or any

in the first experiment. In addition, news consumption is strongly associated with higher levels of support for trade among control-group subjects in both surveys—the exact opposite of what would be expected if the Chinese media contributed to protectionist sentiments. While it’s likely that state propaganda has played some role in shaping public opinion on the trade war, our evidence suggests it is not the only driver of Chinese protectionist sentiments and this alternative explanation cannot explain many of the patterns we observe in the data.

### *Representativeness of Sample*

Turning to the external validity of the findings, it is reasonable to wonder whether the way in which the netizens in our sample respond to the treatments would differ from how other Chinese citizens would react. We cannot definitively rule out this possibility without data from other groups. However, there is one way we can help address this question using the samples at hand: by examining whether the observable dimensions in which our sample differs from the rest of the population moderate how subjects respond to our treatment effects. If responses to our treatments are similar for the young and old, poorly educated and highly educated, poor and rich within our sample, this would strongly indicate that our main findings are likely to generalize to the broader population. To this end, we estimate a series of models where we added multiplicative interaction terms between our treatments and age, income, and education. Appendix C shows that just one of the 18 interaction terms is statistically significant at the 95% level: in the first survey, responses to the “US protectionist” treatment was stronger among older respondents. If anything, then, the over-representation of younger individuals in the sample might be under-estimating the effect among average Chinese citizens. More importantly, though,

public responses to US protectionism seem fairly uniform across these key demographic dimensions.<sup>4</sup>

### *Applicability to Other Policy Issues*

Our main evidence focuses on trade policy, but the so-called US-China trade war encompasses many issues beyond traditional tariff barriers. Does US protectionism have a similar impact on attitudes on other international economic policy issues? Both surveys included parallel experiments on a second crucial component of the US-China economic conflict: high-technology innovation policy. As in our main experiments, we randomly assigned some respondents to be primed about US restrictions on trade with China on high-technology sector. Appendix D shows that the results of the two technology experiments closely mirror the previously reported results on trade policy. Compared to a control group that did not receive any primes, respondents in the US protectionism treatment group are much less likely to favor cooperation with foreign firms in the area of high-tech innovation policy. US protectionism undermines support for international economic cooperation in multiple issue-areas, not just in the trade arena.

### *The Effects of US Policy Changes*

The results thus far show that priming respondents about US protectionism reduces support for the liberal international order. One might wonder whether actual shifts in US trade policy have similar effects on Chinese public opinion. Indeed, previous research suggests that treatments in survey experiments often have stronger effects than those of similar treatments that take place in the “real world” (Barabas and Jerit 2010). We address this external validity question in this

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<sup>4</sup> We also considered a range of other potential moderator variables, including party membership, hukou status, gender, and the trade-dependence of a respondent’s prefecture. A small number of interaction terms were statistically significant, but no interaction coefficient is significant in both datasets.

section by examining whether the escalation of US protectionism in May 2019—in between our two surveys—had a similar effect on policy preferences as our experimental primes. While comparing levels of support for open trade between our two surveys is a useful way to assess the external validity of our findings, it is undoubtedly an imperfect solution because we cannot fully distinguish the effects of US protectionism, China’s response to that protectionism, and other over-time changes from one another.

As noted earlier, levels of support for open trade were far lower among our control-group respondents in the July/August survey than those in the April survey. Column (1) of Table 4 shows the results of a simple bivariate regression where the outcome is a respondent’s trade policy attitudes, and the “treatment” variable is a dummy variable indicating whether or not a respondent was in the second (July/August) survey. The data is pooled across the two surveys but restricted to the control groups in each to ensure that all subjects received an identical version of the question. The bivariate estimates imply that support for open trade fell by at least two full points between April and July/August.

Our argument suggests that this drop in support is likely due to the fact that the US announced higher tariffs on Chinese goods in May, which was followed by China’s promise to retaliate with higher tariffs of its own. However, several alternative explanations are also possible. First, average attitudes might differ across the two surveys because different types of people took each survey. To address this concern, we use standard covariate-control strategies as well as pre-processing techniques to ensure that we achieve high degrees of covariate balance across the two surveys. Column (2) of Table 2 shows the results with controls added for demographic variables. Column (3) shows results for the same regression run after coarsened exact matching (Iacus, King, and Porro 2012). Finally, Column (4) shows the regression results

using weights from entropy balancing (Hainmueller 2012). The estimations consistently show a fall in support for trade by around two full points. This indicates that observationally equivalent respondents were more hostile towards open trade in August than in April. Moreover, the table provides some evidence that females are more protectionist, while those with higher income and education are more supportive of free trade. These correlates accord with studies of trade preferences in US citizens (Hainmueller and Hiscox 2006; Scheve and Slaughter 2001), suggesting similarities in drivers of support for and against trade that span regime types.

Table 2: Reduced Support for Open Trade Over Time

	(1)	(2)	(3)	(4)
Second Survey	-2.23** [0.119]	-2.19** [0.148]	-2.04** [0.210]	-2.62** [0.121]
Income		0.11 [0.055]	0.15 [0.110]	0.12* [0.051]
CCP Member		-0.10 [0.175]	-0.13 [0.359]	-0.41** [0.157]
Female		-0.05 [0.142]	-0.12 [0.224]	-0.51** [0.131]
Age		0.06 [0.081]	0.18 [0.219]	0.21** [0.072]
Education		0.25* [0.114]	-0.13 [0.370]	0.36** [0.091]
Urban Hukou		0.08 [0.143]	-0.22 [0.235]	0.48** [0.131]
Prefecture Trade-Dependence		-0.29 [0.155]	-0.18 [0.300]	-0.23 [0.147]
Constant	6.57** [0.091]	5.52** [0.387]	6.45** [1.092]	5.30** [0.314]
Observations	1,310	1,042	414	1,340
R-squared	0.212	0.212	0.203	0.296

Standard errors in brackets

\*\* p<0.01, \* p<0.05

We run further checks to address the possibility that the fall in support might be driven primarily by a turn in state propaganda after the failure of bilateral negotiations in May, towards greater nationalism (Wang and McNeil 2019). To do this, we include a variable on *news consumption* into the models shown in Columns (2)-(4). If the fall in support for free trade was primarily driven by state propaganda, we would expect a greater turn towards protectionism amongst those who consume more news.<sup>5</sup> We find that the inclusion of news consumption does not change the significance or size of the coefficient on *Second Survey* in any of the three models. And, contrary to the expectations of this explanation, the coefficient on news consumption is *positive* and significant in some models, indicating that people who consume more news are more pro-trade. We also examined whether news consumption moderates the effect of time, but the interaction between news consumption and *Second Survey* is not statistically significant. These checks indicate that state propaganda was likely not the main driver of the change in trade preferences over time.

It is undoubtedly difficult to fully rule out the possibility that other factors contributed to the decline in support for open trade between the two surveys. However, these results suggest that these trends are not likely due to demographic differences or state propaganda. The most likely explanation—and one that is consistent with our survey experiments—is that this was due in large part to increased US protectionism and perhaps China’s trade-policy response to that protectionism.

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<sup>5</sup> We do not include news consumption in our main analyses as the variable is potentially affected by the treatment variable itself (i.e. it is likely that the deterioration of the trade war drove some proportion of the respondents to increase their news consumption).

## **VI. The Impact of the Trade War on Regime Support**

The results shown in the previous section indicate that the US' protectionist actions have reduced support for international economic cooperation. In this final empirical section, we address whether these attitudes are strongly held and politically consequential. Scholars of public opinion have long been concerned that individuals' reported policy preferences are not deeply held, but instead reflect off-the-cuff responses, or "non-attitudes" (Converse 1964). This concern has been raised in the context of recent scholarship on public attitudes on trade policy (Kleinberg and Fordham 2018; Kuo and Naoi 2015, 102). To help address this question, we examine whether and how trade attitudes and the trade war have influenced mass support for China's central leadership.

If Chinese citizens do not have strongly held views about trade, these opinions and the escalation of the US-China trade war should not impact attitudes towards China's central government. On the other hand, one popular narrative found in media reports indicate that the ramping up of nationalistic messages in state propaganda has boosted support for the Chinese government during the trade war (Gift 2019). It is also possible, however, that the economic impact of US tariffs and heightened uncertainties over the future of the Chinese economy has weakened popular support for the government. In line with this latter perspective, Xi Jinping and other top officials have been criticized by lower-level Chinese elites for their handling of the trade conflict with the US (Blanchard and Yao 2018; Economist 2018).

To help shed light on this question, we again leverage the fact that US-China trade relations soured in between our April 2019 and July/August 2019 surveys. The first column of Table 3 shows that average citizen satisfaction with the central government fell about a third of a point on an 11-point scale between our two survey waves, from just below 8 points in April to

about 7.6 points in July/August.<sup>6</sup> The next model includes demographic controls while models 3 and 4 and use matching and entropy balancing techniques, respectively, to address the possibility that this change might be due to potential sample differences between the two survey waves, as was done in Table 2. All of the models show a decline in regime support by 0.34 to 0.45 points, even after controlling for and matching on key observable characteristics.<sup>7</sup>

It is challenging to isolate the effect of the trade war on government satisfaction since other variables were also changing in this period. If deteriorating trade relations are indeed driving the decline in support for the central government, then the decline in government satisfaction between the two surveys should depend on attitudes about trade. Specifically, we should observe the largest drops in government support for individuals whose trade preferences are most at odds with government policy. Since both US and Chinese trade policy become more protectionist in between the two surveys, supporters of free trade are the group whose preferences are farthest from government policy in this period, and thus should be most likely to grow more dissatisfied. At the same time, despite nationalist rhetoric in state media, the Chinese government's trade policy responses have remained cautious and non-escalatory (Cheng 2019; Ren 2019; R. Zhong 2019). This measured response means that citizens that favor a highly protectionist might also reduce their support for the government if they feel that the Chinese government's relatively moderate protectionist response was insufficiently strong.

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<sup>6</sup> This question asks how much people agree that “I am very satisfied with the performance of the central government”, with responses ranging from “strongly disagree” (0) to “strongly agree” (10). Unlike the analyses of changes in trade policy attitudes, here we do not restrict the analysis to control-group respondents. Doing so is not necessary because the experimental treatments came after the regime satisfaction question in the survey.

<sup>7</sup> We do not include news consumption as a control in these tests, for the afore-mentioned concerns of it being a post-treatment variable. However, inclusion of news consumption into the models shown in Columns (2)-(4) does not change the results. News consumption shows up as statistically significant only in the last model (using weights from entropy balancing), and even there the coefficient is negative rather than positive. That is, across our pooled sample, we find that respondents with higher levels of news consumption had lower levels of satisfaction with the central government.

Table 3: Reduced Satisfaction with Central Government Over Time

	(1)	(2)	(3)	(4)
Second Survey	-0.34** [0.054]	-0.44** [0.066]	-0.45** [0.076]	-0.40** [0.052]
Income		0.02 [0.025]	-0.00 [0.036]	0.06* [0.022]
CCP Member		0.37** [0.079]	0.47** [0.115]	0.34** [0.070]
Female		-0.34** [0.063]	-0.35** [0.079]	-0.51** [0.055]
Age		0.03 [0.037]	0.03 [0.060]	-0.01 [0.029]
Education		-0.06 [0.051]	-0.08 [0.089]	-0.00 [0.040]
Urban Hukou		-0.14* [0.064]	-0.20* [0.085]	-0.13* [0.057]
Prefecture Trade-Dependence		-0.09 [0.070]	0.01 [0.104]	-0.11 [0.060]
Constant	7.96** [0.041]	8.29** [0.173]	8.37** [0.268]	8.17** [0.137]
Observations	5,261	4,217	2,535	5,468
R-squared	0.008	0.026	0.032	0.036

Standard errors in brackets

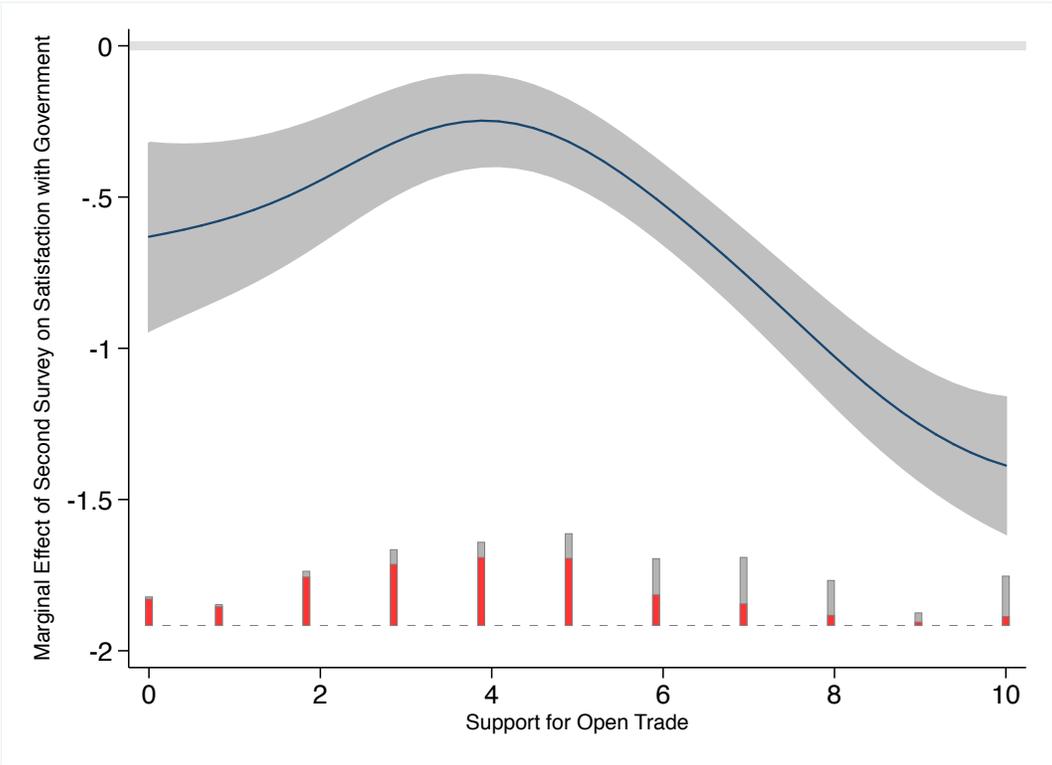
\*\* p<0.01, \* p<0.05

Given that the moderating effects of trade attitudes on satisfaction with the government are potentially non-linear, we use Hainmueller, Mummolo, and Xu (2019)'s kernel estimator for interaction effects to test the relationship between survey timing and trade attitudes on support for the government, where survey timing serves as our proxy for the deterioration of the trade war. Figure 4 shows the main results from this model: the marginal effect of "Second Survey" on central government satisfaction, conditional on attitudes about free trade.<sup>8</sup> The drop in support for the central government between April and July was fairly minimal, at about 0.3, for those that

<sup>8</sup> This model includes all the covariates included in Table 3. Results are also robust to the inclusion of news consumption as a covariate.

have middling positions on trade (*Support for Open Trade* = 5). Support for the regime fell about twice as much among the most protectionist groups (marginal effect = -0.63 for the most protectionist). That drop was most precipitous among individuals who are strongly pro-trade; the marginal effect is -1.4 among those reporting the maximal support for free trade. This suggests that the trade war might be hurting Chinese government popularity on two ends of the trade spectrum: while pro-traders are upset about the decline in open trade, the strongly protectionist are also dissatisfied that the government’s response has not been stronger. However, the dissatisfaction appears stronger among proponents of free trade than among advocates of even more protectionism.

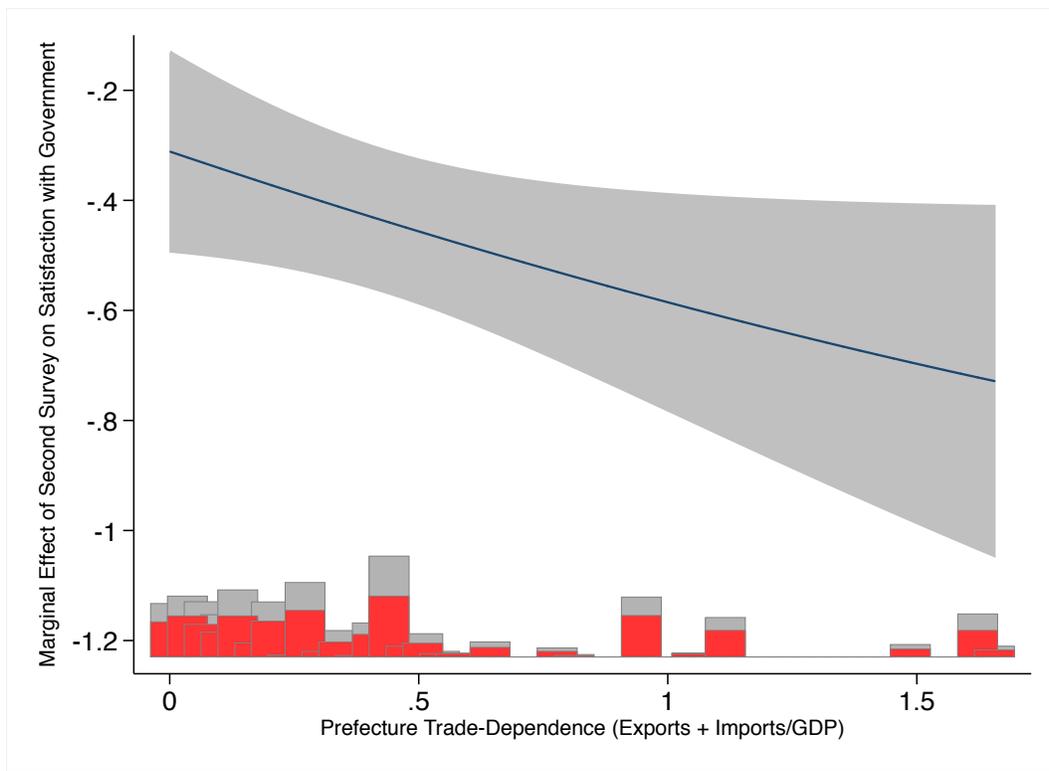
Figure 4: Support for Open Trade and Satisfaction with Central Government,



Similarly, if the trade war is driving the decline in regime support, one would expect to observe sharper declines in regime support in regions of that have been most affected by the

trade war—namely, more trade-dependent regions. Figure 5 shows the results using a prefecture’s trade-dependence (total trade relative to GDP) as the moderator variable, using the same kernel-based estimator as in the previous figure. The results are consistent with this expectation. In a prefecture where trade accounts for 3% of GDP (the fifth percentile of this variable), regime support declined by about 0.32 between April and July. By contrast, regime support fell by more than twice as much (0.7) in regions with trade-to-GDP ratios of 150% (the 95<sup>th</sup> percentile of this variable). The decline in support for the central government among free-traders and in trade-dependent regions during this period of deteriorating foreign trade relations suggests that the trade war has hurt the central government’s popularity among some constituencies.

Figure 5: Prefecture Trade-Dependence and Satisfaction with Central Government,



## VII. Conclusion

The rise in populism in developed and developing nations, the recent emergence of tit-for-tat trade protectionism as well as discontent over the efficacy of the WTO have combined to generate serious concerns over the continued functioning of the international economic order (Ikenberry 2018). Through a series of survey experiments, we show that US protectionism has produced a consistent decline in public support for international economic cooperation, in what is arguably the US' most important trading partner. This reduced support for free trade is partly driven by decreased support towards trade with the US as a trading partner, but attitudes towards trade with the US do not fully account for the overall decline in support for open trade. Furthermore, protectionism generates a competing desire to diversify one's economic risks by increasing trade cooperation with third countries. By leveraging variation in the US' protectionist behavior, we are also able to show that the public is sensitive to different *forms* of protection. Discriminatory protection raises the desire to *increase* trade with third countries, while being reminded of the WTO restrains the public's protectionist response.

While the feedback effects of US protectionist actions are multifaceted and can be difficult to disentangle, this paper exploits a deterioration of the trade war in between the timing of two survey waves to externally validate our findings on the impact of the trade war on baseline attitudes on trade. Through two additional survey experiments, we further validate that these changes in public sentiment on trade play out similarly in the closely related issue area of technology cooperation.

These findings provide concrete evidence supporting fears about the broader impact of the US' protectionist actions in recent years. Our research further contributes to literature on the role of reciprocity in international economic exchange, by showing that the decline in support for

open trade in China is not solely driven by a desire to retaliate against US tariffs. Moreover, the way in which protection is enacted – whether unilaterally or under international rules, and whether discriminatory or targeted – matters to the public. While these findings are likely to be most germane to the US given its role as China’s top trading partner, they are likely to travel to cases of economic tensions between China and its other major trading relationships, such as with the European Union and with Japan and Korea. By contrast, if a small country that accounts for a small share of China’s trade raises tariffs on Chinese goods, this could be expected to increase the desire to retaliate against that country. But it is much less likely to change Chinese citizens’ views about trade more generally.

Finally, our results indicate an important knock-on consequence of the trade war on public satisfaction with the Chinese government. While media reports have suggested that the government’s deployment of nationalistic rhetoric in state media is boosting regime support, we find that support for the government in fact declined in specific segments of the population as the trade war deteriorated. The US-China trade conflict, therefore, has had multiple impacts on public opinion related to important political and economic issues. Not only has US protectionism eroded support for international cooperation in China, it has also undermined – rather than strengthened – support for the Chinese government.

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