



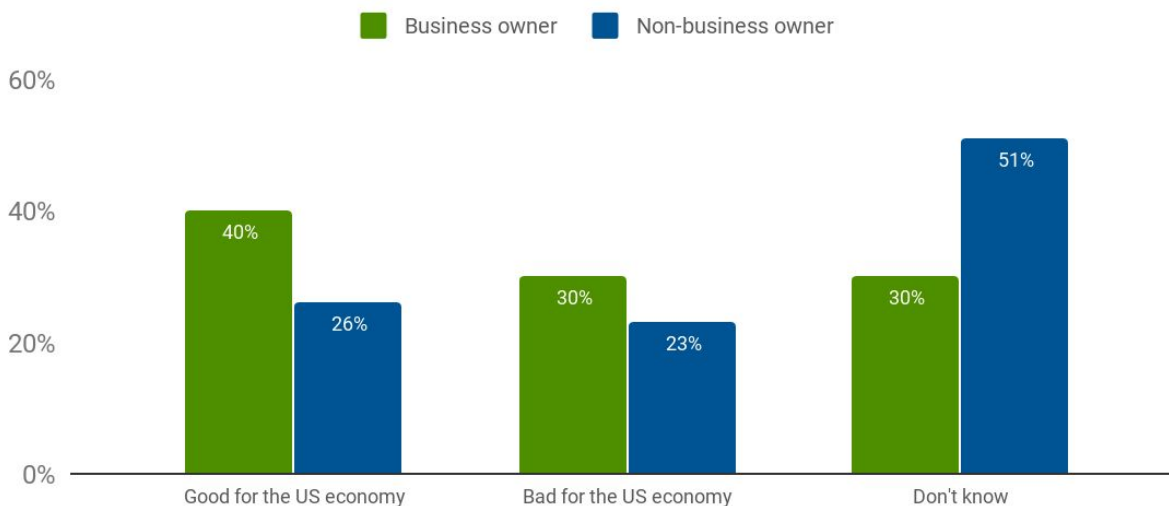
## Do Americans support US trade policies?

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*Do Americans support US trade policies? RIWI continuous tracking of 1,000+ Americans per week from June-September 2018 shows that a consistent majority of Americans are not opposed to protectionist policies, including tariffs on Chinese products. The data show that these views are held widely across the country, are not changing, and even more pronounced for those that are likely to vote Republican and for business owners. The one exception is early data showing the farm belt holds more mixed views, to be confirmed with a more definite signal as more data comes in. This overall finding leaves the door open for continued US protectionism vis-a-vis China heading into the midterms and beyond.*

### US tariffs on Chinese products are...



RIWI data, August 2-September 28, 2018, 3,404 observations.

Despite occupying the headlines since President Trump assumed office in 2017, trade remains a low priority issue for most Americans. Our previous [RIWI brief](#) covering 8,000+ views of Americans from June through August 2018 showed that most Americans are neither anti-trade nor pro-trade. Half of Americans consistently over time and across the country do not feel they know enough to say whether NAFTA, or trade with China, is good or bad for the US.

In this brief, we highlight the data from June 22-September 28, 2018, which combine for a total of about 15,000 randomly engaged views on a range of trade issues (for some questions, we randomly ask one of three questions, and so have about 5,000 randomly engaged views). This allows us to get pictures of regional sentiment, changes over time, and preliminary sentiment amongst businesses, and likely Republican voters.



RIWI data continue to show that the majority of Americans lack strong convictions on trade. Among those who do have an opinion, a slight majority are consistently in favor of tariffs on Chinese products. Those with opinions also support the concept of “paying higher prices on consumer products in return for jobs returning to the US”.

*Business more supportive of China tariffs than general public*

Do businesses support US protectionism? On the one hand, US tariffs imposed on Chinese imports penalize businesses that rely on imported inputs or products. On the other hand businesses have been negatively impacted by Chinese competition.<sup>1</sup> RIWI data show that, despite the impact on imported input prices, businesses tend to be *more* supportive of tariffs than not, and more supportive of tariffs than the general population. RIWI will continue to track this to see if this result holds as we approach the midterms.

*Likely Republicans support China tariffs*

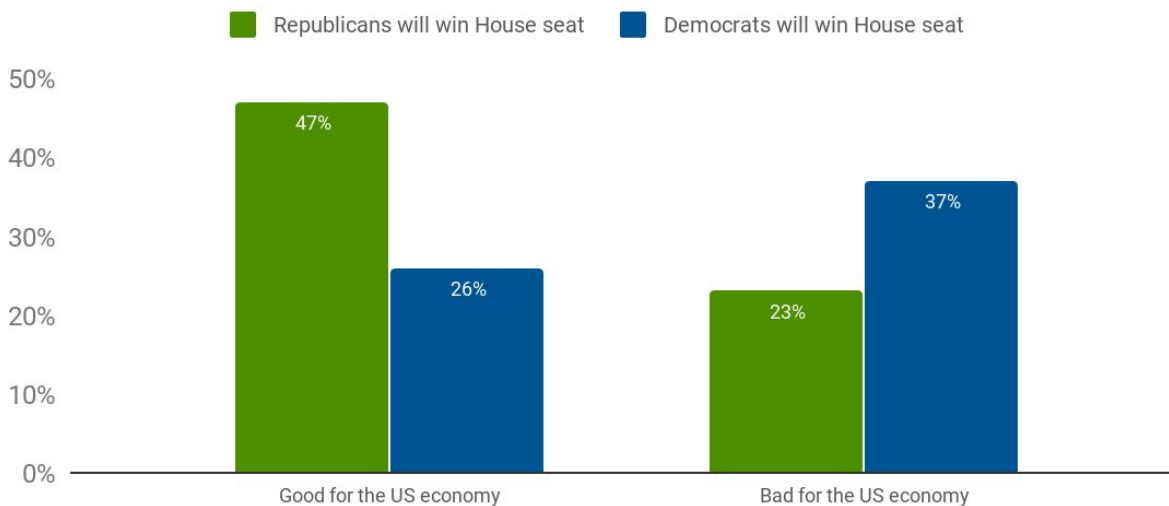
Do Republicans support US protectionism? Since respondents do not always truthfully report for whom they will vote, we ask them which party they think will win their House of Representatives seat in the November 2018 midterm elections. The idea is that those who are friends and neighbours of Republican voters are likely to vote Republican themselves.

RIWI data show that those who tend to support Republicans are more likely to support tariffs on China. Almost half of likely Republican voters appear to support US tariffs against China, a slight increase between June/July and August/September. Those likely to vote Democrat, by contrast, are less likely to support US tariffs on Chinese products. This represents a reversal from historical support: Democrats used to favor trade protectionism and Republicans free trade.

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<sup>1</sup> Recent research shows that the US lost 2 million manufacturing jobs from 1999-2011 due to Chinese import competition ([Acemoglu et al, 2016](#)).

## US tariffs on Chinese products are...



Source: RIWI data, June 22-Sept 28, 2018, 5,514 Americans

### *Farm belt reaction mixed*

Is the US farm belt starting to feel the pain of US tariffs on China and Chinese retaliation on US ag products? Are they less supportive of US trade policies? Americans in manufacturing-heavy states are more likely to be supportive of tariffs on Chinese products, as are Americans in most other parts of the country. But preliminary data from farm belt states shows that the majority of those who hold opinions are opposed to the tariffs. RIWI will track these data to provide a more definitive signal as more data come in.

### *General public not opposed to tariffs*

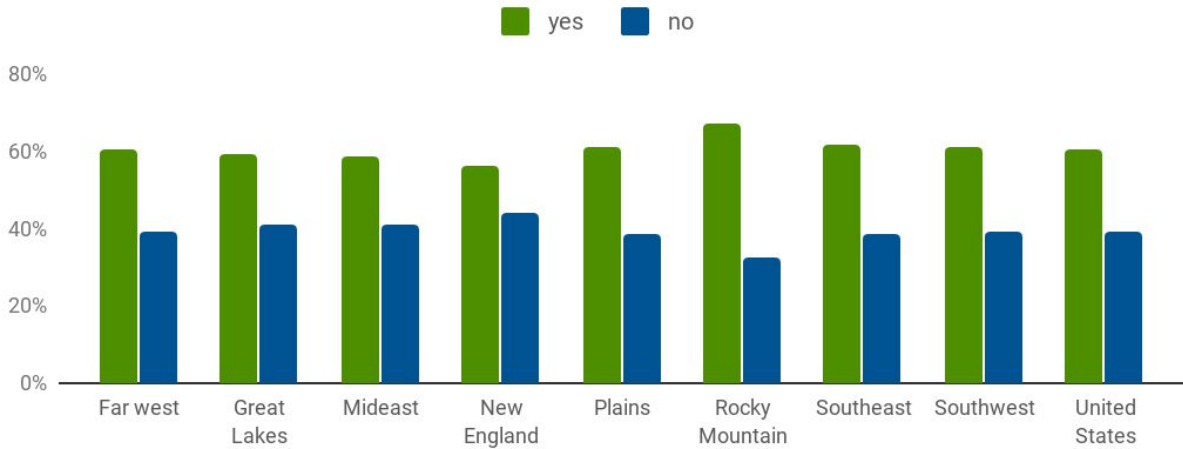
Does the general public support trade protectionism? When asked about US tariffs on Chinese products, a consistent majority of Americans doesn't know whether they are positive or negative for the US economy. The majority of those that do have opinions are consistently (from June through September) in favor of tariffs on Chinese products, though by a narrow margin. RIWI will continue to track if this changes as the full impact of the trade war kicks in.

### *Support for protectionist narrative broad-based*

Across the United States, the data suggest that Americans support a protectionist narrative. US tariffs on Chinese products or other foreign products are expected to translate into higher consumer prices. The majority of respondents with an opinion are willing to support the concept of higher consumer prices in exchange for jobs returning to the US (roughly one third of Americans did not have an opinion). This opinion is stable across all regions of the country. This lack of geographic variability is notable given the significantly uneven impact of international trade on job displacement, and suggests a broader ideological consensus among Americans that transcends individual economic circumstances.



## Would you accept higher prices on household products if jobs returned to the US?



Source: RIWI data, June 22-Sept 28, 2018 12,362 Americans

Taken together, these data signal that there is no strong opposition to current US policies. Investors, business, and policymakers need to adjust their strategies for the very real possibility that these tariffs will be long-lasting. At the same time, the finding that most Americans have not made up their minds may yet present an opportunity to shift public opinion. In the run-up to the midterms, and as the effects of two-way tariffs kick in, RIWI data will provide a definite signal of when and whether those views start to shift.

### *What else should RIWI ask?*

RIWI is continuously tracking a range of other emergent financial, economic, and social risks and trends in the US and across all geographies. This includes support for the US trade negotiations strategy and support in China for Chinese retaliation. What else should RIWI ask in the US, China, and other countries?

If you are interested in finding out more about RIWI's continuous global trackers, or for access to the more detailed dataset and regional results for this analysis, please contact:

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## **About RIWI Technology: A Highly Accurate Approach to Measuring Global Change**

A government agency was trying to track how the public responded to pandemics, but found existing methods unreliable, lagged reality, and could not be compared across countries. RIWI's technology responded with a highly accurate signal, available in real time, that can be compared across countries simultaneously. Since then, RIWI's proprietary technology has continued to track epidemics including Zika and Ebola, and has been extended far beyond to track a broad range of social and economic issues in almost all countries of the world.

RIWI technology draws randomly from the entire Web-using population in any country. This is a vastly larger sea of potential respondents than the small pool of repeat respondents in traditional surveys, providing a more reliable signal of true sentiment. The respondents therefore include not just those that are engaged and regularly share their opinions, but also those that don't regularly take surveys and are disengaged. This creates a more representative set of respondents, a larger ongoing number of respondents, and more reliable data. In addition, RIWI tracks new respondents daily, allowing an assessment of whether views are stable or changing.

For more on RIWI's award-winning technology and its applications, see <https://riwi.com/about-us/>.