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NOTE

A game of tariffs: is there demand for tariffs in Europe?

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ABSTRACT

In April 2025, the United States introduced sweeping tariffs on imports from the European Union and the United Kingdom, raising transatlantic tensions and prompting debate over Europe's response. This study examines whether Europeans support domestic tariffs, either as protectionist or retaliatory measures. While polls suggest strong backing for retaliatory tariffs against the US, such attitudes may reflect patriotic or emotional reactions. To test preferences for tariff policies in a more realistic setting, we conducted two pre-registered conjoint experiments: a government-preference experiment in Germany and a candidate-choice experiment in the United Kingdom. In these experiments, tariff proposals appeared alongside other policies, mirroring multidimensional political landscapes. Contrary to expectations, Europeans consistently rejected tariffs in favor of alternative economic policies regardless of whether framed as protectionist, funding green initiatives, or responding to US actions. This absence of support is observed across social groups and cannot be explained by pre-existing attitudes toward the United States or President Trump. Our findings suggest that demand for protectionism is weaker than direct polling implies, and that public appetite for tariff measures is lower than early surveys suggested. As global trade tensions escalate, understanding public demand is essential for designing trade policies that are both effective and democratically grounded.

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KEYWORDS Anti-Americanism; conjoint experiment; tariffs; political behavior; public opinion; protectionism

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Introduction

In 1930, American farmers were reeling from collapsing crop prices, and small-scale industrial producers expressed growing concern about foreign competition. In response, the US Congress passed the *Smoot-Hawley Tariff Act*, imposing comprehensive duties on more than 20,000 imported goods (Irwin, 2017; Mitchener *et al.*, 2022). The international backlash was immediate: trading partners across the world retaliated with tariffs of their own, triggering a dramatic and lasting collapse in global commerce (Bidwell, 1930). One recent study estimates that US exports to retaliating countries declined by 28–32 per cent (Milder, 1999; Mitchener *et al.*, 2022). Far from restoring prosperity, the Act exacerbated the Great Depression (Irwin, 2017).

Nearly a century later, in April 2025, US President Donald Trump announced a sweeping tariff policy targeting imports from around the world, including the United States' key transatlantic trading partners – the European Union (EU) and the United Kingdom (UK) (Aratani & Smith, 2025). While transatlantic trade disputes are not new, the 2025 tariffs are unprecedented in scope: a uniform rate of 10 per cent on UK goods and 20 per cent on EU goods,[1] applied broadly across product categories and affecting approximately 70 per cent of their exports to the United States, respectively (Rankin, 2025). Echoing the logic of *Smoot-Hawley*, the policy was framed as a defense of American producers from foreign competition. Market reactions to the trade war instigated by the second Trump administration have been damning. In the immediate aftermath of so-called 'Liberation Day'[2] the global stock market suffered a loss of more than five *trillion* US dollars in part because of market fears of a retaliatory trade war between the US and other nations.

This paper asks whether there is public demand within key European electorates for tariffs, both as a general trade protectionist policy and as a retaliatory response. In 1930, it was popular demand for retaliation that helped fuel a global proliferation of tariffs following the passage of the *Smoot-Hawley Act*, contributing to a sharp contraction in global trade and a measurable decline in global welfare (Milder, 1999). Today, as transatlantic tensions escalate once again, understanding the extent and structure of support for tariffs among European publics is both empirically and policy relevant.

Recent research on public responses to protectionist trade policy finds that foreign protectionism reduces domestic support for free trade (Steinberg & Tan, 2023). Several factors appear to shape this response, including fears of national economic decline (Mansfield & Mutz, 2009), concerns about fairness and equity (Brutger & Rathbun, 2021; Dür *et al.*, 2025; Mutz, 2021), potential reputational loss in the global economy (Mutz, 2021), and both 'direct' and 'generalized reciprocity' (Steinberg & Tan, 2023). Direct reciprocity refers to

the tendency for support for cooperation with a specific trade partner to decline when that partner is seen as uncooperative (Brutger & Rathbun, 2021; Steinberg & Tan, 2023; Tingley & Tomz, 2014). Generalized reciprocity, by contrast, implies that protectionist trade policy reduces support not only for bilateral trade but also for free trade more broadly (Mutz, 2021; Steinberg & Tan, 2023).

In the lead-up to the enactment of the US tariffs, a YouGov survey conducted across seven European countries revealed widespread public support for retaliatory protectionist measures (Corlin, 2025). On average, 69 per cent of respondents favored imposing tariffs on US imports. In Germany, support stood at 68 per cent, while in the United Kingdom it was even higher, at 71 per cent. However, posing direct questions about policy preferences in a politically charged environment is prone to well-documented biases, including answers that are driven by expressive patriotism (Berinsky, 2007; Hetherington & Nelson, 2003; Huddy & Khatib, 2007).

In this paper, we study public preferences for tariff policies using an approach that mirrors how citizens exercise and communicate their choice in real-world political contexts: as part of a broader bundle of considerations with trade-offs that individuals weigh when evaluating policy choices and political alternatives (Abou-Chadi *et al.*, 2025; Ferrer *et al.*, 2025; Gross *et al.*, 2024; Wicki *et al.*, 2020). Leveraging the timing of two major political events – coalition government negotiations in Germany and municipal elections in the United Kingdom, both coinciding with the implementation of US tariffs – we fielded two pre-registered conjoint experiments to identify public preferences regarding tariffs vis-à-vis other protectionist and economic policies at the beginning of the 2025 Trump trade war.

Our results robustly demonstrate that European citizens reject tariff policies in favor of other protectionist and economic policies. No matter how tariffs are framed – whether as a general protectionist trade policy, as a revenue source for green initiatives, or as a retaliatory measure – European publics consistently oppose them. These results are not sensitive to self-reported political ideology and are also, contrary to our pre-registered expectations, *not* conditioned by levels of negative affect toward the US or the sitting US President, Donald Trump. They are, rather, rotundly rejected by a diverse coalition of voters across both of the countries we analyze.

Our findings contribute to existing knowledge on the international effects of protectionist trade policy in general, and tariffs in particular, such as those implemented by the current US administration. In line with previous studies, we find that European publics react thermostatically to political developments in the US that are perceived as 'out of the ordinary'. Our central finding – that popular demand for tariffs is weak in two of Europe's largest constituencies – has broader implications for policymakers navigating a volatile international trade environment. As leaders consider what an appropriate response to

American protectionism should be,[3] our results suggest that there may be limited public appetite for tariffs in Europe, challenging the notion that trade wars might enjoy popular legitimacy. While existing evidence suggests that Americans do not support Trump's trade wars (Bhattarai *et al.*, 2025),[4] we show that Europeans, too, are disinclined to respond in kind. Escalating trade conflicts, therefore, are not an inevitable consequence of public opinion.

Design & data

Public support for retaliatory tariff policy in the aftermath of the *Smoot-Hawley Tariff Act* fueled a global trade war that had devastating consequences for the well-being of millions around the world (Irwin, 2017; Mitchener *et al.*, 2022). To better understand public attitudes toward tariff policy in the current context – where the United States is poised to implement a comprehensive global tariff policy – we employ a conjoint experimental design with applications in two distinct settings.

Conjoint analysis is a well-established method for isolating the effects of individual components on the overall appeal of a broader whole (Hainmueller *et al.*, 2014; Leeper *et al.*, 2020). It has been widely used to estimate the impact of specific candidate traits on candidate appeal (Christensen *et al.*, 2024; Grahn & Håkansson, 2025; Horiuchi *et al.*, 2020; López Ortega, 2024; Schwarz & Coppock, 2022; Simon & Turnbull-Dugarte, 2025), to identify which concrete policy features shape public confidence in reform (Kollberg *et al.*, 2025; Rincon, 2023; Turnbull-Dugarte, 2025), and to assess how particular policy proposals affect public support for political parties and governments (Abou-Chadi *et al.*, 2025; Gross *et al.*, 2024). Crucially, this method mitigates social desirability bias, which can distort responses to direct questions about sensitive or politically charged topics (Horiuchi *et al.*, 2022). Moreover, conjoint experiments better reflect how preferences are translated into real-world political decision-making through the simultaneous evaluation of interrelated attributes in complex social and political environments with diverse trade-offs.

Rather than asking respondents directly about their support for retaliatory tariffs against the US, our design embeds different tariff policies within a broader bundle of policy options presented to respondents in distinct choice environments. This approach allows respondents to weigh tariff policies of various types against competing priorities, yielding more nuanced and context-sensitive preferences. We designed two separate, pre-registered conjoint experiments in two of the US' largest trading partners: a government-preference conjoint in Germany and a candidate-choice conjoint in the United Kingdom.

In Study 1, we leveraged the timing of two concurrent political developments in April 2025: the imminent implementation of President Trump's

new trade policies and the formation of a new coalition government in Germany, the largest trading partner of the United States within the EU. This context provided a unique opportunity to examine public preferences concerning both coalition composition and key policy priorities. German respondents were presented with three successive pairs of hypothetical coalition treaties and asked to choose their preferred option in each case.[5]

Each agreement included information about the composition of the governing coalition, along with policy positions in six domains: domestic economic policy, protectionism, migration, women's rights, LGBT+ rights, and government regulation of the internet. In addition to these policy domains, the profile also varied regarding the partisan make-up of the government. Within the protectionism domain, we included two distinct tariff proposals: one introducing tariffs to protect domestic producers, and another proposing tariffs as a source of funding for green initiatives. These were measured against two distinct policies to lower Germany's contribution to the EU budget.[6]

Study 2 was launched shortly after the 2025 UK municipal elections. This study served as a follow-up to Study 1, allowing us to unpack potential differences in support for tariffs as a general protectionist policy and as a retaliatory measure. British respondents were asked to choose their preferred political candidate from five successive pairs of hypothetical candidates, each running under the respondent's self-identified most preferred political party. Each candidate profile contained information about the candidate's socio-demographic characteristics as well as policy positions in four domains: immigration, internet regulation, gender equality, and economic policy. Within the economic domain, we included two tariff proposals: a general tariff policy and one explicitly framed as retaliatory, justified as a response to unfair trade practices by other countries.[7]

Both studies were fielded to high-quality, quota-representative samples of the adult populations in Germany and the United Kingdom.[8] Study 1 includes 3,994 German respondents sourced from Bilendi. The quota-based sample is representative along gender, age, education, and region of residence. Each respondent from Study 1 made three forced choices, yielding nearly 24,000 observations. Study 2 comprises 1,500 British respondents sourced from Prolific. The quota-based sample is representative along gender, age, ethnicity, and education. Each respondent from Study 2 made five forced choices, resulting in a total of 15,000 observations. Together, these two highly powered, carefully constructed samples provide a robust basis for examining public preferences for tariff policies among European voters.

As visualized in Figure 1, the fieldwork for both of our experimental studies took place in the days and weeks immediately after the US President announced a slate of tariffs on countries around the world, including

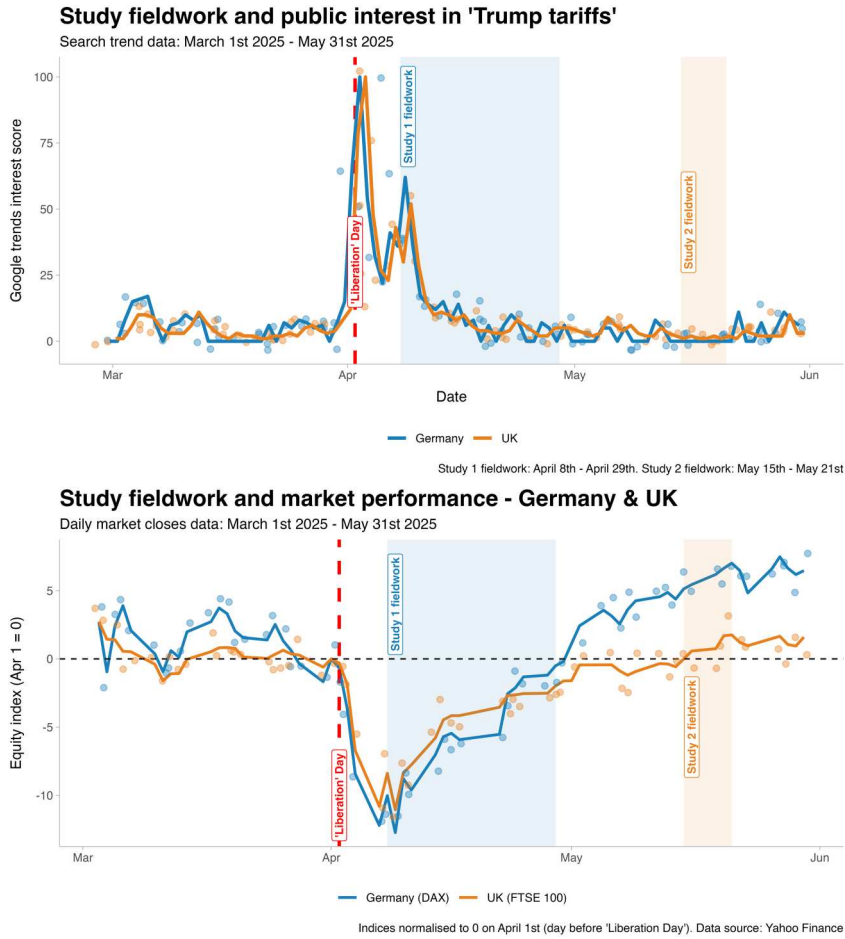

Figure 1. Study fieldwork, tariff saliency and market performance.

Europe. Relying on both Google trends search data and market performance indicators from equity markets in Germany (DAX) and the UK (FTSE 100), Figure 1 serves to demonstrate the spike in saliency given to the topic of tariffs in the aftermath of Trump's announcement. Not only did the announcement result in a dramatic negative collapse in both the German and UK stock market – a negative trading day not seen since the beginning of the Covid-19 pandemic (Partington, 2025) – but mass interest in 'Trump tariffs' also increased immediately after these tariffs were announced. While our experimental manipulations strategically do not explicitly mention Trump or the United States in order to ascertain more generalizable preferences, the salient nature of the US' imposition of tariffs on both the European Union (EU) and the UK is likely to result in a US-centric priming among respondents.

Pre-registration

We pre-registered both studies and our central hypotheses on the Open Science Framework (OSF) prior to data collection.[9] In both Study 1 (Germany) and Study 2 (UK), we anticipated to observe positive preferences for tariff policies, based on descriptive surveys conducted by YouGov in March 2025, which indicated broad support for retaliatory tariffs across Europe (Corlin, 2025). We further hypothesized that positive tariff preferences would be stronger among respondents expressing higher levels of negative affect toward the United States and President Trump. Additionally, in Study 2, we expected retaliatory tariffs to be more popular than general tariffs. As the results below demonstrate, however, respondents consistently express negative preferences for tariffs, regardless of how they are framed or which alternative policies they are presented alongside.

Results: Europeans do *not* want tariffs

We begin by assessing general preferences for different types of tariff policies in Germany and the United Kingdom vis-à-vis other protectionist or general economic policies. In the German case, we study the support for two proposals: one introducing tariffs as a general protectionist measure, and another linking tariffs to environmental goals by using the revenue to fund green initiatives. These proposals were embedded alongside two additional protectionist policies involving reductions in Germany's financial contributions to the EU. This setup allows us to compare relative preferences for tariffs compared to other prominent forms of economic nationalism.

In the United Kingdom, we examine public reactions to two tariff proposals: a general tariff policy and one framed as retaliatory. These were embedded within a broader menu of economic policy options, including investment in infrastructure, evidence- based policymaking, support for emerging technologies, increased research and development, and regulatory streamlining. This design enables us to evaluate tariff proposals against a wider set of pragmatic, forward-looking economic strategies.

One important limitation of our approach is that it estimates the popularity of tariff policies within a context of a finite set of alternative policy proposals, either protectionist or of a more general economic nature. The risk is that if these alternatives are policies that are generally viewed positively by the public, tariff policies will invariably appear less popular by comparison. To address this concern, we carefully selected both protectionist and broader economic policies that vary in their expected public support, thereby avoiding a systematic bias against tariffs in the comparison. At the same time, this limitation is also an important feature of our design which adds to the realism and external validity of our study. In the real world, tariffs are often costly

economic policies which voters need to support over other alternative economic and trade policies which may be more popular or desirable. A strength of this measure and our design more broadly is that it guards against expressive responding where citizens feel it is easy to say that they are in support of tariffs without considering the trade-offs involved in that choice.

The main estimands of interest are marginal means (MMs) and average marginal component effects (AMCEs). MMs estimate the average level of support for each policy proposal, *ceteris paribus*, while AMCEs compare the support for a given policy relative to a designated reference category (alternative protectionist/economic policies) – offering insight into its marginal appeal or cost (Hainmueller *et al.*, 2014; Leeper *et al.*, 2020).

Contrary to our pre-registered hypotheses, the results presented in Figure 2 suggest that European publics reject tariff policies, regardless of how they are framed or which alternatives they are presented alongside. In both Germany and the United Kingdom, tariff proposals – whether general, retaliatory, or linked to environmental goals – receive significantly less support than alternative economic or protectionist policies.[10]

In the German case (top panel), coalitions proposing general tariffs (MM = 0.46) or green tariffs (MM = 0.48) are significantly less popular than those pursuing alternative protectionist policies (MM = 0.53). The AMCEs show that general tariffs reduce support by 6 percentage points, while green tariffs reduce it by 4 percentage points, compared to the alternative. Even when linked to climate action, tariff policies fail to attract public support. The

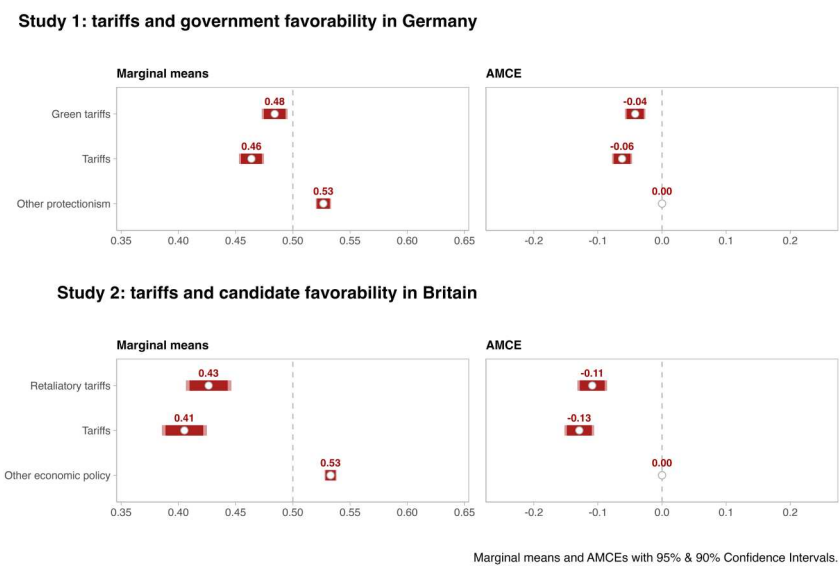

Figure 2. Preference for tariffs among German and British publics.

systematic rejection of coalitions proposing tariffs is not trivial. Given a baseline level of support for coalition agreements with protectionist policies other than tariffs (0.53), an AMCE of −0.06 equates to an 11 per cent reduction in coalition preferability. In the case of green-motivated tariffs, the AMCE equates to a 7 per cent preferability penalty.

The British results (bottom panel) show a similar pattern. Candidates proposing economic policies other than tariffs, receive the highest support (MM = 0.53), while support declines for those favoring retaliatory tariffs (MM = 0.43) or general tariffs (MM = 0.41). The identified AMCEs reveal clear penalties: −0.11 for retaliatory tariffs and −0.13 for general tariffs, relative to the baseline. The causally identified penalties for pro-tariff candidates are larger than those observed in Germany. Taking retaliatory tariffs as an example, an AMCE of −0.11 represents a 21 per cent reduction in relative candidate preferability vis-a`-vis the baseline.

Together, these findings paint a consistent picture: across countries, framings, and political contexts, tariff policies fail to attract political endorsement for governments (Germany) or candidates (UK).[11] This runs counter to both descriptive survey evidence and our pre-registered expectations, which anticipated greater enthusiasm for tariffs – especially when justified as retaliatory or linked to widely supported goals such as environmental protection. Tariffs – retaliatory or otherwise – are *not* a vote- winning strategy for parties and candidates to adopt.

The rejection of tariffs & anti-American sentiment

In this section, we examine potential group-based differences in support for tariff policies. Our pre-registered expectation was that support for tariffs would be stronger among respondents with higher levels of negative affect toward the US and its sitting president, Donald Trump.[12] While our design intentionally avoided framing the tariffs as retaliatory measures against the US, the study was fielded at a time when the new direction in US trade policy was heavily publicized across Europe. We therefore expected heterogeneity in support for tariff policies based on individual attitudes toward the US and President Donald Trump.

We formulated our affect-based hypotheses against the backdrop of the identity dimension that often underpins trade policy preferences, whereby retaliatory measures may be supported or opposed as part of a broader in-group versus out-group dynamic (Mutz, 2021). Given the rise of affective polarization in Europe and beyond (Boxell *et al.*, 2024; Garzia *et al.*, 2023; Gidron *et al.*, 2020; Renström *et al.*, 2021; Wagner, 2021), we expected voters with negative views of the US and/or Donald Trump to react more positively to tariffs as a form of retaliation, while voters with favorable views of the US and/or Trump would be less inclined to endorse tariffs that

could be perceived as undermining his 'Make America Great Again' agenda. Our expectation is reinforced by research showing that policy preferences are increasingly shaped by affective ties to political leaders and partisan groups (Druckman *et al.*, 2013, 2020; Sorace & Hobolt, 2020). At the same time, it remains possible that European voters with favorable attitudes toward the US and/or Trump might actively support tariffs as a policy instrument employed by the current US administration. Nonetheless, we elected to pre-register the other alternative.

Levels of self-reported affect were measured via the following survey instrument: *Using the 0–10 scale below, we'd like you to rate how you feel about the following people, groups and countries. On this scale 0–4 mean negative/cold feelings, 5 means you have no feelings either way, and 6–10 mean positive/warm feelings.* The distribution of responses to these affect measures is visualized in Appendix E. As our test of subgroup variation is based on the pairwise difference in the marginal means between two stratified groups (Leeper *et al.*, 2020), we dichotomize affect based on values lower than 5 (negative) or otherwise (neutral and positive).

The results, shown in Figure 3, provide only partial support for the pre-registered hypotheses.[13] Among German respondents, the data align with expectations: those with negative affect toward the US and Trump are *more* likely to support tariffs than those with positive views. Importantly,

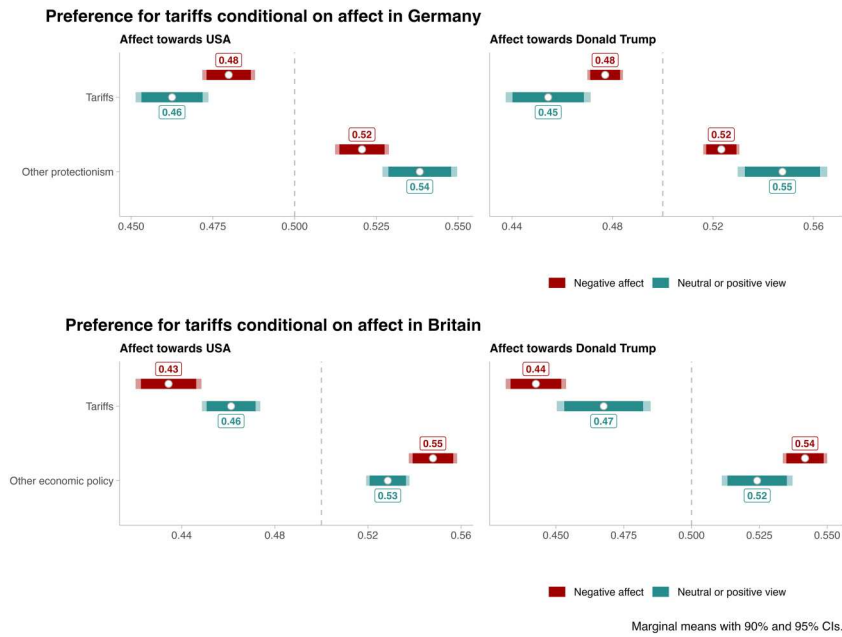

Figure 3. The role of anti-American sentiment in shaping support for tariff policies.

this difference reflects only a *relative* opposition – both groups, regardless of affect, systematically reject tariff policies.

In the UK, we observe the opposite pattern: respondents with more favorable views of the US and Trump are slightly more supportive of tariffs.[14] As in Germany, however, this asymmetry represents only a relative difference: UK respondents, regardless of affect, still reject tariff-promoting candidates.

Despite these cross-national differences, the broader pattern is clear: in both Germany and Britain, overall support for tariffs in realistic political choice environments remains low, regardless of respondents' attitudes toward the US or Donald Trump.[15]

Exploratory analysis of treatment heterogeneity

So far, we have shown that tariffs are not preferred by the public in either Germany or the UK, and that this holds among voters who both like and dislike the US and Donald Trump. To rule out other potential sources of heterogeneous treatment effects, we now present an exploratory analysis of interactions between additional pre-treatment covariates and the tariff attribute.

The left-hand panel of Figure 4 displays the MMs for profiles in Study 1 assigned to the tariff condition, conditional on respondent gender, age, sexuality, education, region (in Germany), ideology, partisanship, and affect toward Trump and the US. The right-hand panel shows the MMs for profiles in Study 2 under the tariff condition, conditional on respondent gender, age, education, ideology, partisanship, and affect toward Trump and the US.[16]

As shown, there is no subgroup in which the average level of support for the tariff condition exceeds the 0.5 threshold. In other words, across both the German and UK experiments, there is no observable group for whom the

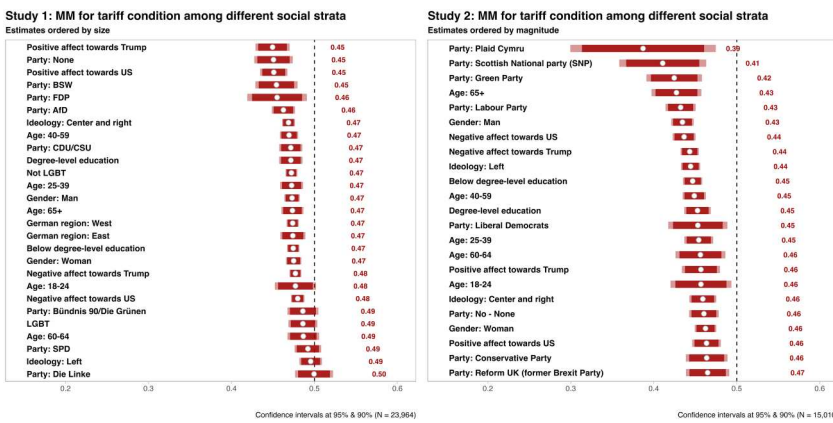

Figure 4. Uniform rejection of tariffs across identifiable subgroups.

introduction of tariffs is the preferred policy. Notably, there is no consistent pattern linking observable covariates to the magnitude of opposition to tariffs. In Germany, opposition is somewhat weaker among respondents on the political left than on the right – regardless of whether ideology is measured through partisanship or self-placement – whereas in the UK, the pattern is reversed, with slightly stronger opposition among left-leaning respondents. However, none of these between-group differences are statistically significant. Across all observable strata, systematic opposition to tariffs emerges as the modal preference.

Conclusion

In this paper, we examined the extent to which citizens in two key European constituencies support tariffs. Our fieldwork was conducted in the days immediately following Donald Trump's renewed push for protectionist trade policy in 2025. Amid the potential for an escalating trade war with the United States, our conjoint experiment addresses an important empirical gap in understanding public opinion toward protectionist trade policy by causally assessing public support for tariffs in a more realistic policy setting than prior research. Using two large, pre-registered conjoint experiments, we find consistent evidence that European mass publics reject tariffs – regardless of whether they are proposed by governments or political candidates, and whether they are presented alongside other protectionist measures or broader economic policies. We also find that Europeans consistently reject tariffs as a basis for coalition or candidate support – regardless of gender, age, ideology, or political leaning.

Our results contrast with existing findings from self-reported survey questions and polling data (Corlin, 2025) and carry important policy implications. When questions explicitly ask about respondent preferences for retaliatory tariff measures against Donald Trump's specific policy proposals, there is a risk that answers will be influenced by expressive patriotism. Our aim, by contrast, was to assess the public's general preferences for tariffs.

To European political leaders, our findings suggest that, contrary to early polls indicating support for tariff retaliation, there is little appetite for tariff measures in general among European publics. For policymakers favoring a more measured, cautious approach to trade disputes, this is encouraging. Contrary to our expectations, Europeans appear to take a more considered view of the potential negative consequences of tariffs. This pattern aligns with previous research showing that the public often responds negatively to retaliatory trade wars, even when not directly affected (Mansfield & Solodoch, 2024).

In addition to examining preferences for protectionist measures in Europe, this study contributes, albeit indirectly, to the broader literature on international responses to Donald Trump's presidency. Existing research shows

that democratic publics abroad respond *thermostatically* to events and policies associated with Trump's administration – that is, they move in the opposite direction in reaction to his actions (Chan, 2025; Minkus *et al.*, 2019). Our findings suggest that a similar dynamic accompanies Trump's renewed embrace of protectionist trade policy in 2025. Though we, in our design, intentionally refrained from measuring attitudes to specific trade retaliation aimed at the US, we fielded the study at the time when the US was the only major political actor in the world actively pursuing tariff policies.

From a methodological standpoint, our findings highlight the value of employing multiple approaches – including conjoint experiments – to assess public opinion on contemporary political issues. While recent observational survey evidence suggests that Europeans favor retaliatory protectionist policies targeting the United States (Corlin, 2025), our results – which assess the relative popularity of various tariff policies compared to other policy alternatives – offer a different perspective. By presenting policy attributes in a more naturalistic and unobtrusive manner, our conjoint design helps mitigate concerns about social desirability bias and expressive responding. We therefore recommend that pollsters and survey providers incorporate tools such as conjoint experiments alongside traditional self-report items to better capture public opinion and evaluate how different policy responses resonate with the electorate.

Notes

1. In late May 2025, Trump announced that he would increase the tariff applied on EU goods to 50 per cent.
2. President Trump penned 2 April 2025 – the day global market tariffs were announced – as 'Liberation Day'.
3. From the outset, European leaders advocated for a 'mild' and 'calibrated' response to Donald Trump's tariff announcement. However, there were also early calls for firmness and openness to retaliation at both national and EU levels. For instance, the Vice-Chair of the European Parliament's Delegation for Relations with the US remarked in February 2025: 'When it comes to tariffs, our first line of defense is dissuasion. Although this is not the ideal scenario, Europe is capable of resisting, retaliating, and protecting its key sectors' (European Parliament, 2025). In a similar vein, Bernd Lange, Chair of the European Parliament's Committee on International Trade, mentioned potential counter-tariffs early on and maintained this position throughout the spring and summer 2025 (Rinke, 2025). At the national level, Germany's Economy Minister Robert Habeck called the announcement of tariffs damaging to both European and US economies and urged urgent negotiations to avert a spiraling trade war. He insisted, 'The EU must now give a firm response to the tariffs – we will not back down in the face of the US' (More, 2025). The UK's stance throughout this period was notably restrained.
4. However, a study by Essig *et al.* (2021) shows that Trump supporters took elite cues from Trump and embraced more protectionist views.

5. The setup of the Study 1 conjoint can be found in Appendix A.1. Table A.2 contains all the attributes and their respective levels. The 'tariff' attribute is dubbed protectionism.
6. See Table A.2 for the exact wording of these attribute levels.
7. The setup of the Study 2 conjoint can be found in Appendix A.2. Table A.3 contains all the attributes and their respective levels. The 'tariff' attribute is dubbed economic policy. Our design intentionally refrained from presenting our retaliatory tariff policy as one explicitly aimed at the US to minimize the effect of expressive patriotism on data quality. However, given how well publicized the many tariff announcements of Donald Trump have been in the European media space throughout the study period, we are confident that our respondents associated our tariff attribute – particularly the retaliatory iteration – with the US in mind.
8. Descriptive statistics can be found in tables and A.2 for Study 1 and 2, respectively.
9. The pre-registration for Study 1 can be found here and the pre-registration for Study 2 can be found here. Both studies received ethical approval from multiple instances, including the Social Science Ethics Board at the University of Southampton and the Swedish Ethical Review Authority. See Appendix A for more details.
10. In Appendix C, we also present results in which the two tariff policies featured in each study are collapsed into a single category (see Figure C.1), along with a figure displaying marginal means for all alternative (non-tariff) policies individually (see Figure C.2).
11. These results remain robust when using the ranked, rather than forced-choice, outcome variable (see Figure D.1 in Appendix D).
12. It is worth highlighting that, at the time of our data collection, popular attitudes toward the US were remarkably low. This negativity has been driven, in part, by the country's recent democratic erosion (Goldsmith *et al.*, 2025; Turnbull-Dugarte *et al.*, 2025).
13. See Figure C.3 for detailed results, which present the marginal means (MMs) for all individual tariff policies.
14. See also the notable differences between German and UK respondents in their overall attitudes toward the US and Donald Trump (Table A.1, Table A.2, and Figure E.1).
15. This overall lack of support for tariff policies is also evident when using the ranked, rather than forced-choice, outcome variable (see Figure D.2 in Appendix D). At the same time, the reversal of affect- based patterns in the German sample suggests that these results should be interpreted with caution, as they may be sensitive to outcome measurement.
16. Sexuality and region were regrettably not recorded in Study 2, which accounts for the asymmetry in covariate sensitivity testing between the two studies.

Disclosure statement

No potential conflict of interest was reported by the author(s).

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Data availability statement

All the original data and replication code is available via www.michalgrahn.com and the Harvard Dataverse at https://doi.org/10.7910/DVN/H9DPSX.

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