How Presidents Justify Tariffs:

The Strategic and Selective Use of Economic Evidence

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1. Introduction

Tariffs are central policy instruments in global trade. Tariffs are not only used as economic tools but also for political purposes, such as strategic negotiation in international affairs (Kim and Margalit, 2021). In the United States, the relevance of tariffs as a political issue has grown significantly since Donald Trump's 2016 presidential campaign, during which protectionist trade policies were framed under the "America First" slogan to appeal to voters (Williams, 2019). Since Trump's election, tariff policy has remained a highly politicized issue and produced significant and wide-ranging economic consequences, including disrupted global supply chains (Grossman et al., 2024). This increasing politicization of tariff policy in the U.S. highlights the need to understand how public executives use strategic communication to justify their tariff policy decisions.

In the field of public administration, motivated reasoning offers an insightful theoretical lens to understand how public executives selectively and strategically use information to justify their policy decisions. The theory suggests that individuals often interpret information in line with their ideological beliefs, in which they emphasize supporting evidence while disregarding information that contradicts their pre-existing views (Peterson and Iyengar, 2020; Slothuus and Vreese, 2010). This is especially relevant in understanding what justifications are selectively used to justify tariff decisions, as the partisan differences around trade policy have shifted significantly since 2016. Before 2016, Republicans typically supported free trade interests of business constituents, whereas Democrats favored protectionism to align with their labor constituents (Bowen et al., 2022). However, the partisan alignment on tariffs has shifted over time. Under the Trump administration, the Republicans reversed their policy stance to being protectionist, especially against China, as a central part of their political agenda (Bowen et al., 2022). Moreover, globalization and the rise of China increased the complexity of the economic landscape, making the effects of tariff policy more difficult for voters to understand, despite tariffs' substantive economic impact (Rho and Tomz, 2017). This complexity could increase the potential for strategic framing and selective presentation of economic information. Therefore, tariffs offer an insightful case for applying motivated reasoning theory to investigate how ideological commitments shape the selective and strategic use of economic data and what economic indicators the American executive commonly uses.

Understanding what economic information the political parties use to justify their tariff policy position and whether they engage in motivated reasoning is underexplored in the public administration literature. While motivated reasoning has been applied to a range of policy areas in an experimental setting, it has not been applied to trade politics in real speeches (Strickland et al., 2011). The selective usage of economic data to justify tariff policies is underexplored despite tariffs being a salient electoral point (Baekgaard et al., 2017; Anderson and Harbridge, 2014). While research suggests partisan shifts in trade policy, many scholars emphasize the national security justifications presidents use, yet do not provide a comprehensive understanding of what economic indicators are used to justify their policy decisions on tariffs (Von Daniels, 2024; Amiti et al., 2019; Selmi et al., 2020).

To address these gaps, this research will answer the question: **How does party ideology influence the use of economic information by American presidents to justify their policy positions on tariffs?** This question offers a refined understanding of how political leaders use economic data to shape narratives around tariff policy. There are two main objectives stemming from the research question. The first focuses on *what* types of economic information are used by each party, whereas the second objective examines *how* this information is used, specifically whether it is selectively and strategically applied in line with ideological commitments. Together, it analyzes both the type of economic data used and the potential motivated reasoning behind its use.

The first objective is addressed inductively, as existing theory cannot clearly predict what economic information is primarily used by the Democrats and Republicans. To explore this, a coding frame is developed during the analysis of political speeches by U.S. presidents. The type of economic information used to justify their tariff policy positions is coded to reveal patterns in what type of economic indicators, like employment rates or trade deficits, are used by Donald Trump and Joe Biden during their presidencies. The second objective is addressed deductively by drawing on the theoretical framework of motivated reasoning to determine whether U.S. presidents selectively and strategically use economic information to justify their tariff policy decisions. This research uses qualitative discourse analysis on political speeches on tariffs to compare what economic data is used by each party and whether they engage in motivated reasoning. The findings reveal that the Republican administration frequently engaged in both selective and strategic motivated reasoning, focusing on economic indicators like trade deficits, domesticating the supply chain, and increasing the employment rate in specific sectors.

Although Democrats also engage in selective reasoning, it is to a lesser extent, particularly focusing on domestic supply chains while considering consumer prices and increasing the general employment rate.

1.1 Theoretical relevance

This research contributes to the public administration literature as it advances research on motivated reasoning by using a qualitative discourse analysis in a real-world setting. Unlike prior research, which has mainly been conducted in experimental settings, this research analyzes how politicians engage in motivated reasoning during public speeches, where they must justify their decisions to their constituents (Nielsen and Baekgaard, 2013; Groenendyk and Krupnikov, 2021). This offers a more applied understanding of how ideological commitments can shape the strategic and selective presentation of information in formal policy justification. Moreover, this research provides a more comprehensive understanding of what evidence is used by Democratic and Republican presidents since the ideological shift of the parties in 2016 (Park and Stangarone, 2019). This contributes to the academic literature on ideology and trade policy by providing insights into what economic justifications for tariffs are used and how these vary by party ideology.

1.2 Societal relevance

This research also provides valuable societal insights for understanding the use of evidence in American politics, specifically on tariffs. In polarized political environments like the U.S., voters often adopt the positions of their preferred party (Broockman and Butler, 2017). The argumentation of politicians does not just reflect public opinion, but it can also shape it (Basave and He, 2016). Therefore, when we gain more insights into what economic evidence Republicans and Democrats use, it not only reveals how these parties justify their position, but it also highlights how these justifications may shape public opinion. Additionally, the findings are also relevant for stakeholders such as businesses and labor unions. By understanding what types of evidence are emphasized by the different parties, the stakeholders can understand what the motivations behind trade policy decisions are and to what constituents the politicians try to appeal to, which could guide their voting decisions. Furthermore, analyzing motivated reasoning on a more politicized issue is important as it assesses whether economic data is being used to inform the public or simply to reinforce ideological commitments by strategically selecting reinforcing evidence. In democracies, public officials are expected to justify their

policy decisions so that voters can hold them accountable (Staszewski, 2008). So, understanding whether certain economic evidence is used or not in policy debates is crucial for holding policymakers accountable.

This thesis first explains the purpose of tariffs, followed by a review of the literature on the progression of ideological differences between Republicans and Democrats regarding trade policy. Then, the theory of motivated reasoning is explained, leading to the theoretical expectations. This is followed by the methodology that explains the research design and approach. Afterwards, the results are presented by first providing a descriptive overview of how tariffs influence several economic indicators, followed by the results of the qualitative discourse analysis that reveals patterns of motivated reasoning and the type of economic indicators used. Finally, the findings are discussed in relation to existing academic literature, and the thesis concludes with an overview of the main contributions.

2. Tariffs and ideology

2.1 The purpose of tariffs

Tariffs are taxes on imported goods that are imposed by a government on another country. The size of the tariff can vary based on the type of good, country, and trade agreements (Carbaugh, 2022). Tariffs increase the price of imported goods, which relatively increases the price compared to domestically produced products. As tariffs influence trade flows and the price of goods, they are a powerful tool in shaping trade and international relations (Hahn, 2025). The main purpose of tariffs is to protect domestic industries from foreign competition by making foreign goods more expensive. This gives domestic industries a comparative advantage, leading to consumers buying more domestic products, stimulating more domestic production, preserving jobs, and promoting industrial growth (Carbaugh, 2022). Additionally, tariffs can be used as a political tool to pressure other countries to change unfair trade practices or to comply with certain policies, such as a lack of labor or environmental standards (Carbaugh, 2022). Tariffs are also used to raise government revenue, like other taxes (Hahn, 2025). Moreover, tariffs can be used for national security reasons, such as reducing the reliance on foreign industries in important sectors (Cheng et al., 2019).

Tariffs can have different effects on varying groups in society. For domestic producers, tariffs can be beneficial as the increasing price of imported goods gives them a comparative advantage. However, businesses that rely on imported materials face an increase in production cost, which reduces their competitiveness (Barattieri and Cacciatore, 2023). Consumers often bear the cost of tariffs due to the increasing prices of imported goods (Amiti et al., 2019). Additionally, tariffs can reduce trade efficiency, hurt diplomatic relations, and provoke retaliatory tariffs from other countries, which slows economic growth (Gao and Ye, 2024; Fetzer and Schwarz, 2021). While tariffs can have benefits relating to national security and political influence, they can also lead to inefficiencies and higher prices for businesses and consumers.

2.2 Partisan shifts in U.S. tariff policy.

This section reviews the literature on how tariff policy positions are linked to party ideology and emphasizes how political and economic shifts have complicated the traditional alignment between party identity and tariff positions. Historically, there were deep-rooted differences between Republican and Democratic parties, shaped by their core constituencies, whereas recently, geopolitical and economic shifts have altered the traditional trade positions of these parties.

In the late 20th century, Republicans generally supported free trade and Democrats favored protectionism, a division largely influenced by interest groups and core constituencies. Bowen et al. (2022) attribute his alignment to the civil rights movement in the 1960s, in which the Democrats began representing the Northern states, characterized by urban labor unions and minority groups, leading to them favoring tariffs to protect domestic industries and jobs. The Republicans primarily represented the Southern states, representing export-oriented and agricultural businesses, thus advocating for free trade as these businesses benefited from globalization (Bowen et al., 2022). Karol (2000) also emphasizes that the ideological division on trade policies is largely due to their different constituents, as labor unions would be more supportive of Democrats' protectionist stance, and export-oriented businesses would be more supportive of Republicans' free trade position. Osgood (2018) notes that there was a general trend of increasing public support for free trade between 1960 and 2000. This was primarily driven by the growing role of multinational corporations, who supported free trade as globalization resulted in more internationally dispersed supply chains, making trade

liberalization more favorable for these interest groups (Osgood, 2018). These studies have in common that they attribute the tariff ideology of political parties to their constituents.

Other scholars also emphasized the importance of interest groups influencing trade policy, either indirectly through elections or directly through lobbying efforts. Brock and Magee (1978) demonstrate through a model that labor and capital groups lobby by financially contributing to political parties to influence election campaigns. Grossman and Helpman (1994) refined this model by also incorporating how interest groups try to influence policy outcomes through lobbying contributions. While these models might oversimplify real party dynamics, they do provide important insights into the significant role of interest groups in trade policy in that time period. Combined, these studies demonstrate that interest groups and constituencies had a significant influence on party tariff positions.

This traditional ideological division on trade is not as applicable in more recent political debate due to globalization changing the current economic and political context. Blanchard et al. (2016) argue that the rise of global supply chains complicates the politics of protectionism as it makes the distinction between domestic and foreign economic interests less clear. This is because countries are not simply importers or exporters but instead are both suppliers of inputs and consumers of foreign components (Blanchard et al., 2016). Williams (2019) adds that globally integrated supply chains make businesses more interconnected and interdependent on international business, which leads to consumers being used to lower prices, increasing their resistance to tariffs. While the working class would benefit from tariffs due to job protection, it also raises the prices for consumers, which complicates their preferences (Williams, 2019).

Due to the growing complexity of the economic landscape, voters are often ignorant of how tariffs affect them personally, leading them to support policies that are not always in their self-interest (Rho and Tomz, 2017). Rho and Tomz (2017) found through survey experiments that when people are informed of the impact tariffs have on themselves and others, they are more likely to prefer tariff policies that are in their self-interest rather than those of others. The significance of these findings is that we cannot understand trade policy decisions entirely based on the constituents' true self-interest, but rather, on what the constituencies perceive as being in their self-interest. Dolan et al. (2024) demonstrated why small and medium businesses do not engage in political actions opposing tariffs during the U.S.-China trade war, despite being harmed by the tariffs. They found that it was due to managers prioritizing political, ideological,

and cultural beliefs, especially conservatism, over economic self-interest. Both Dolan et al.'s (2015) and Rho and Tomz' (2017) findings help explain why people who do not benefit from tariffs would still vote for a pro-protectionism president.

The economic complexity of tariff policy limits public understanding and therefore creates conditions in which populist narratives can be used by offering simplified solutions to economic issues and attributing credit or blame in politically mobilizing ways (Ungureanu and Popartan, 2020). This is evident in the context of China's economic rise and its perceived threat to American jobs, which significantly influenced U.S. elections between 2000-2016, especially in regions most affected by Chinese trade competition (Autor et al., 2020). In these counties, representatives from either party gained more votes when they adopted a more protectionist stance, which disrupted the traditional business-labor divide regarding their preferences on protectionism (Autor et al., 2020). Park and Stangarone (2019) explain that while Republicans were supporters of free trade, Trump changed the Republican ideological stance on trade towards economic nationalism. Trump's "America First" slogan gained support within the party, leading to realignment where many Republicans embraced protectionist policies (Park and Stangarone, 2019).

Conversely, Democrats moderated their position on trade by opposing Trump's unilateralism and instead favored multilateralism and fair trade (Park and Stangarone, 2019). Historically, agricultural export industries supported the Republican party, yet due to Trump's tariff policy stance, some shifted to the Democratic party due to the damage tariffs have caused them (Blanchard et al., 2024). Finbow (2023) analyzed how populist movements influenced trade policy debates in response to globalization and economic insecurity. During the first Trump administration, the Republican Party shifted its ideological position towards economic nationalism, blaming NAFTA and China for economic hardship. This opened political space for Democrats to also reposition themselves, where many centrist and suburban Democrats began adopting more pro-free trade stances, emphasizing the value of multilateralism and fair-trade practices (Finbow, 2023). Data by Keser et al. (2023) show this reversal in partisan trade attitudes. By using a cross-sectional survey to track attitudes towards trade by partisans over time, they found that Republican voters favored free trade and Democrats are pro-protectionism, but since Trump's first election campaign in 2016, these attitudes reversed (Keser et al., 2023).

This ideological shift is evident through the policy decisions made by Trump and Biden. While Congress constitutionally controls trade policy, presidents are allowed to impose tariffs under Section 232 and Section 301, which explains how Trump and Biden have exercised broad control over tariff levels without needing new legislation (Reiskin, 2021). Section 232 permits the president to impose tariffs if imports threaten national security, and Section 301 allows presidents to retaliate against countries that engage in unfair trade practices (Meinderts, 2020; Reiskin, 2021). Both sections are broadly and vaguely defined, which gives the executive significant discretion in determining what constitutes a security threat or unfair trade practices (Meinderts, 2020). In 2018, Trump imposed unilateral tariffs on steel and aluminum under the national security rationale, which led to many countries imposing retaliatory tariffs on the U.S. (Amiti et al., 2019). Moreover, Trump cites unfair trade practices under Section 301 to justify multiple rounds of tariffs on Chinese imports between 2018-2019, leading to the U.S.-China trade war (Selmi et al., 2020). However, the usage of Section 232 and 301 by presidents has been very controversial, as several scholars question the validity of the national security rationale for tariffs and argue that this rationale has been used as a pretext for economic protectionism (Kim, 2019; Sracic, 2022). When Biden entered the white house, there were many expectations that he would reverse Trump's tariffs, however, Biden retained most tariffs except for a few EU tariffs and added more tariffs in 2024 on Chinese technology using the national security rationale (Schoenbaum, 2023; Von Daniels, 2024).

This literature review traced the changing relationship between tariffs and party ideology over time, emphasizing the partisan realignment that happened since 2016. While tariffs are both an economic and political tool, academic literature on the Trump and Biden administrations mainly focused on the legal justification these presidents used under Section 232 (national security) and Section 301 (unfair trade practices) that enabled their executive actions (Von Daniels, 2024; Amiti et al., 2019; Selmi et al., 2020). There is a lack of systematic analysis of how the American executive uses and communicates economic indicators like wages, inflation, and innovation to defend their policy decisions on tariffs. This gap matters as tariffs have significant economic consequences, and there is limited understanding of what specific economic arguments are used by the executive and how these are framed and mobilized in executive trade decisions.

3. Theoretical framework

This theoretical framework first explains motivated reasoning theory by outlining the foundations of this theory, its progression in academic debate, and the gaps that remain in motivated reasoning literature. Then, building on prior research, motivated reasoning is applied to the tariff debate setting to deduce theoretical expectations on how economic indicators are selectively and strategically used to defend tariff policy decisions. Lastly, it explains why an inductive approach is used to study what types of economic indicators are used in justifying tariff decisions.

3.1 Motivated reasoning

Several scholars in the public administration field examine how politicians use evidence to justify and communicate their policy positions to the public, especially within the framework of evidence-based policymaking (EBP) (Scott, 2005; Leuz, 2018). EBP assumes that when governments are provided with more accurate and quality information, this will lead to more rational, efficient, and accountable policymaking, leading to scholars advocating for strengthening the role of evidence in the policymaking process (Scott, 2005; Leuz, 2018). However, in practice, evidence is not entirely interpreted objectively as it is influenced by cognitive biases and motivations, which can distort how this information is used in practice (Migchelbrink et al., 2025). Consequently, many scholars explored the role of motivations and cognitive processes underlying EBP, showing that individuals may consciously or subconsciously resist inconvenient information and selectively seek evidence that supports their pre-existing beliefs (Battaglio et al., 2019; Bellé et al., 2018; Cairney, 2016). A prominent explanation for these processes is motivated reasoning, which explains that individuals interpret and use information in ways that align with their pre-existing beliefs, identities, and goals (Kunda, 1990).

Several foundational theories, such as cognitive dissonance theory, selective exposure, and confirmation bias, provide evidence for the idea that individuals are motivated to seek and use information that reinforces their pre-existing beliefs and ignore information that contradicts them (Festinger, 1957; Sears and Freedman, 1965; Wason, 1960). However, critics of these early theories argue that it is not deliberate self-serving motivation but cognitive bias that causes individuals to interpret information based on their prior beliefs, arguing the process is rather subconscious and non-motivational (Miller and Ross, 1975; Nisbett and Ross, 1980). Kunda

(1990) builds on these theories by synthesizing research on motivated reasoning and cognitive bias. By evaluating the underlying mechanisms of bias when interpreting information, two types of motivated reasoning are distinguished. The first is accuracy goals, which is more in line with cognitive bias theory, and notes that individuals' prior beliefs influence how they interpret information, yet their goal is to reach an objective and accurate conclusion. The second type is directional goals, in which individuals try to deliberately interpret information to reach a particular conclusion by employing biased strategies to justify their desired outcome. Individuals with a directional goal try to appear rational by using information to build a justification for their preference to convince others, yet they only derive this conclusion if they find enough evidence for it (Kunda, 1990). This distinction made a significant contribution to the field of motivated reasoning as it separates motivated reasoning based on the goals of individuals.

In the early 2000s, scholars began to apply motivated reasoning theory to the field of political science and public administration to assess voter behavior. Lodge and Taber (2000) argue that the interpretation of new information and political reasoning is rarely objective and instead is driven by pre-existing attitudes and affective associations with political issues and actors. They argue that biased processing of information is more prominent for people who are more politically informed and have stronger political attitudes (Lodge and Taber, 2000). Redlawsk (2002) builds on these findings by testing them in an election context, providing empirical evidence that voters process information to reinforce their prior political preferences, even when seeing contrary information. This directly challenges rationalist assumptions that individuals objectively weigh evidence. Westen et al. (2006) provide neurological evidence of affective bias. They found through fMRI brain scans of committed partisans that when they engage in motivated reasoning, the emotional region of the brain is activated (Westen et al., 2006). While these findings are limited to highly politically engaged individuals, it does provide evidence for motivated reasoning theory from a different disciplinary field. Slothuus and Vreese (2010) reveal through survey experiments that when individuals are more politically engaged, they are more likely to have a bias towards the partisan source of information, emphasizing that partisan bias shapes how information is processed. Strickland et al. (2011) applied motivated reasoning to health policy and argued that individuals who are more politically engaged and knowledgeable about health are more likely to polarize and defend their prior beliefs when being presented with health care information. Collectively, these papers provide evidence that voters engage in motivated reasoning and that these biases in interpreting information increase

with more political knowledge and engagement, making them more likely to interpret new information in ways that reinforce their prior beliefs.

Several scholars argue that the ambiguity of information significantly influences motivated reasoning. Moynihan (2006) emphasizes that performance information is often ambiguous, meaning it can support multiple interpretations. This ambiguity allows individuals to engage in "selective motivated reasoning", where individuals selectively use the aspect of the information that confirms their pre-existing beliefs and ignore or discard the aspects of information that contradict them. Therefore, individuals that are exposed to the same information can derive different conclusions. Keating and Fan (2024) argue that eliminating the ambiguity of performance information can reduce motivated reasoning, as individuals cannot select aspects of the information that confirm their beliefs. However, Baekgaard and Serritzlew (2016) assessed motivated reasoning on unambiguous information and found that individuals still display motivated reasoning. Individuals engage in "strategic motivated reasoning" by strategically framing the unambiguous information to align it with their prior beliefs. This illustrates that while ambiguity of information can facilitate selective interpretation, its absence does not necessarily prevent motivated reasoning, as it simply shifts the form of motivated reasoning. Therefore, selective motivated reasoning involves highlighting favorable parts of ambiguous information and omitting contradictory elements, whereas strategic motivated reasoning involves actively reshaping or reinterpreting even clear evidence to support one's ideological position (Moynihan, 2006; Baekgaard and Serritzlew, 2016). However, scholars often do not acknowledge the ambiguity of the sources used in their experiments to assess motivated reasoning.

While early scholars primarily applied motivated reasoning to understand voters' behavior, later scholars assessed whether political figures also have a bias in interpreting and communicating information. For instance, Nielsen and Baekgaard (2015) demonstrated how the motivations of politicians shape the strategic use of performance data on their attitudes toward spending. By conducting a survey experiment on councilors, they found that councilors chose the same policy measure (increased spending) for both high and low performance information, either to avoid blame or to take credit (Nielsen and Baekgaard, 2015). This shows that political strategic motivations, rather than objective evaluation and efficiency concerns, influence politicians' responses to performance data. Similarly, Anderson and Harbridge (2014) assessed whether partisan elites engage in motivated reasoning when processing information to

make policy decisions, yet instead of viewing political strategy as their motivation, they assess the influence of their ideological leanings. Similar to prior findings on voters, they found legislators also engage in motivated reasoning due to their ideological beliefs (Anderson and Harbridge, 2014). However, this research primarily examines Democratic legislators, so whether this also applies to Republicans remains to be explored. Baekgaard et al. (2017) further explored motivated reasoning amongst political elites by investigating whether increasing the amount of evidence can reduce the bias caused by prior beliefs. Through randomized survey experiments, they found that increasing the amount of evidence did not reduce the impact of prior beliefs but instead increased it, amplifying motivated reasoning (Baekgaard et al., 2017). These studies enrich our understanding of how political elites use information. However, it lacks deeper insight into how they publicly communicate this information to justify their policy positions. Therefore, more research is needed that examines beyond the interpretation of information and includes how evidence is selectively and strategically used in public communication.

Several scholars assessed whether political elites engage in motivated reasoning differently compared to other public officials or citizens. Lerusse and van de Walle (2022) extend the literature by exploring how governance preferences influence how public officials interpret performance data and found that public officials are biased in interpreting information that contradicts their preferences. Additionally, no significant difference was found between politicians and public managers in how they interpret information, which challenges the assumption that politicians are more biased due to their partisan commitments. Conversely, Christensen and Moynihan (2024) argue that politicians engage more in motivated reasoning due to their professional accountability pressures. By conducting a randomized experiment, they found that justification requirements, referring to a careful evaluation of evidence, lead to politicians increasingly engaging in motivated reasoning, whereas the public would engage in less motivated reasoning. This implies that, unlike the general public, politicians have strong incentives to maintain consistent political views, making them more likely to rationalize rather than reconsider their views when confronted with contradictory evidence. The findings by Groenendyk and Krupnikov (2021) explain that the political context matters for assessing motivated reasoning. They found that in competitive debate settings, people are more motivated to defend their pre-existing beliefs, whereas in deliberative contexts, they show more openness to accuracy. This helps explain why politicians may be more susceptible to motivated reasoning.

Most research on motivated reasoning amongst political elites used experimental surveys to assess how they interpret and present information (Nielsen and Baekgaard, 2015; Lerusse and van de Walle, 2022). While experimental settings offer the advantage of controlling variables which enables a close examination of the causal effect, the political elites in these experimental settings might not engage in the same level of ideological justification and strategic reasoning that occurs in real public speeches. Other methods, like qualitative discourse analysis, would enrich prior research by exploring how motivated reasoning happens in real contexts, which captures factors like audience considerations and strategic political incentives.

3.2 Theoretical expectations

Motivated reasoning theory forms a useful theoretical lens for analyzing how politicians utilize economic evidence in tariff debates. Prior research repeatedly demonstrates that politicians are not neutral evaluators of information and instead have strong ideological commitments that influence how they interpret information (Anderson and Harbridge, 2014; Baekgaard et al., 2017). Therefore, I expect that U.S. presidents of both parties engage in motivated reasoning, which is divided into selective and strategic motivated reasoning.

The first expectation is that **American presidents of both parties selectively present only the favorable aspect of economic data on tariffs and omit the unfavorable aspect of the same economic data when it conflicts with their tariff policy position.** This selective use of evidence is often found in prior research on motivated reasoning, and this selectivity is amplified in a debate setting, where individuals have a directional goal to persuade others (Groenendyk and Krupnikov, 2021; Kunda, 1990). Presidential speeches reflect a competitive debate setting as they need to persuade domestic audiences, counter political opposition, and justify policy decisions, so motivated reasoning is likely observed. Furthermore, research by Christensen and Moynihan (2024) support this expectation as they demonstrated that justification pressures increase motivated reasoning among politicians. Due to prior findings on selective motivated reasoning being amplified in settings with justification pressures, I expect frequent selective reasoning in presidential speeches.

The second expectation is that **American presidents of both parties strategically use economic arguments by framing them in ways that oversimplify or distort economic evidence to support ideologically consistent tariff positions.** Nielsen and Baekgaard (2013)

found that politicians often use performance data in a strategic manner to serve their own political goals, which reinforces the theoretical expectation. Moreover, economic concepts are often ambiguous and complex, so the general public often does not understand the influence of tariff policy on several economic processes. This complexity presents an opportunity for strategic reasoning, where politicians can oversimplify or misrepresent economic indicators. Therefore, I expect that economic evidence is particularly susceptible to strategic reasoning.

The theoretical framework does not provide strong evidence to suggest that the degree of motivated reasoning would differ significantly based on party affiliation, rather, prior research focused on political engagement overall (Lodge and Taber, 2000; Slothuus and Vreese, 2010). Therefore, the theoretical expectation is that both Republican and Democratic presidents are likely to engage in motivated reasoning.

3.3 Inductive approach to economic reasoning

How economic information is used by presidents has been hypothesized based on motivated reasoning theory. However, understanding what types of economic information are used by each party is explored inductively. As outlined in Section 2.2, significant gaps in the literature remain in understanding the economic rationale behind tariff decisions in recent years. Globalization has increased the complexity of the economic landscape, making the consequences of tariffs less straightforward than in the past (Blanchard et al., 2016). As a result, voters often lack a clear understanding of how tariffs affect them personally and rely instead on perceptions, ideology, or identity when forming trade preferences. This shift means that voters do not always support policies in their economic interest, and representatives may adopt trade positions that do not directly benefit their constituents (Blanchard, 2016; Rho and Tomz, 2017). Due to the changed context caused by globalization, we cannot attribute Republican and Democrat ideology by their main interest groups, as the interdependence of domestic and foreign markets have made it difficult to draw clear lines between who benefits and loses from tariff policy, making voters less aware of how tariffs impact them (Williams, 2019; Blanchard et al., 2016). Therefore, theories on interest groups or party ideology prior to 2016 are not useful to predict what economic arguments American presidents use to justify their tariff policy decisions after the ideological realignment. For this reason, this research seeks to understand patterns of economic argumentation using an inductive approach.

4. Methodology

4.1 Research setting

This research focuses on the tariff discourse during the first Trump administration between 2017-2021 and the Biden administration between 2021-2025. The period of 2017-2025 has been chosen due to the ideological shift that occurred during Trump's first election campaign in 2016, in which the party shifted from its traditional free trade stance towards economic nationalism, emphasizing protectionism under the "America First" slogan (Park and Stangarone, 2019). The North American Free Trade Agreement (NAFTA) is a trade deal that eliminated tariffs between the U.S., Canada, and Mexico and was renegotiated by Trump in 2017 to reach a new agreement called the United States Mexico Canada Agreement (USMCA) which introduced tariffs on these neighboring countries (Burfisher et al., 2019). During the same period, Trump implemented a wide range of tariffs, including unilateral tariffs on steel and aluminum, and introduced a series of tariffs on Chinese imports between 2018 and 2019 (Selmi et al., 2020). These tariffs were justified under Section 232 (national security) and Section 301 (unfair trade practices), which gives the executive branch authority to impose tariffs (Meinderts, 2020). The Biden administration inherited Trump's tariffs, which were largely maintained under Section 301, yet some tariffs on the European Union were removed to improve trade relations (Cogen, 2024). In 2024, following a four-year review of Section 301, the Biden administration announced significant tariff increases on various Chinese imports, including raising tariffs on electric vehicles by 100% and a 25% increase on steel and aluminum tariffs (Cogan, 2024). Analyzing this specific time window captures the presidencies under both the Trump and Biden administrations, and it encompasses speeches with different contexts in which tariffs are discussed.

4.2 Research design and strategy

To examine the influence of party ideology on the use of economic information by American Presidents to justify their policy position on tariffs, this research adopts a small-N comparative case study by conducting a qualitative discourse analysis. The independent variable is party ideology, which is operationalized through the partisan differences between the two cases of the Trump administration (Republican) and the Biden administration (Democrat). The small-N comparative case study design allows for meaningful comparison between the two party ideologies, and it enables a context-sensitive analysis with analytical depth, which would be difficult to capture through large-N or quantitative methods (Toshkov, 2016). The dependent

variable is the use of economic information to justify policy positions on tariffs, which focuses on what economic information is used, such as job creation, and whether such arguments reflect patterns of motivated reasoning. To examine this, speeches by the executive branch of both parties are analyzed through a qualitative discourse analysis, which is explained and justified in the next section.

4.2.1   Discourse analysis research strategy

Figure 1: Three-step research method

To examine what economic indicators each party uses and whether they engage in motivated reasoning, this study conducts a discourse analysis in three steps (Figure 1). In the first step, the speeches are analyzed inductively to identify instances in which economic arguments are used to justify or oppose tariffs. This involves an initial review of the discourse to extract arguments that reference economic outcomes, such as employment rates, trade balances, and inflation. These arguments are then grouped thematically to construct a coding frame of the economic justifications in the discourse. In the second step, the identified economic indicators are evaluated in relation to existing economic literature and theoretical frameworks. This comparison allows for a critical assessment of whether the arguments presented are consistent with academic consensus, whether they involve simplifications of complex causal mechanisms, or whether they selectively present only one side of a multidimensional issue. The arguments that possess both positive and negative economic implications are incorporated into a structured analytical table to assess selective reasoning by tracking which dimensions of the argument are included and excluded. This evaluative stage is essential to determine whether a particular argument reflects strategic or selective motivated reasoning.

In the last step, a coding frame is developed based on the prior two stages, categorizing economic arguments into strategic motivated reasoning, selective motivated reasoning, or neither. This coding frame is then applied to the entire data set of both administrations. The aim is to identify recurring patterns in the use or omission of economic arguments and to assess whether these patterns reflect motivated reasoning. In particular, the analysis focuses on

whether economic evidence is used in a manner that consistently supports a specific policy position while downplaying or ignoring relevant counter-evidence.

Both the inductive and deductive coding are done manually through Excel. In Excel, the observations are inductively coded by attaching terms such as "increasing the number of steel businesses in the U.S." or "reducing reliance on international resources" and are then grouped into a coding frame. These were then recoded in Excel so the arguments fit the new categorization of the coding frame. The coding process was done through Excel because it enables manual control over both inductive and deductive coding, making it easier to iteratively refine codes, track patterns across cases, and ensure consistency in applying the coding frame. Additionally, the spreadsheet format facilitates side-by-side comparison of coded arguments across administrations, which is essential for identifying recurring discourse patterns (Moncada, 2025).

This three-step qualitative discourse analysis research design is most appropriate for answering the research question for the following reasons. First, a discourse analysis is context-sensitive, meaning that analyzing justifications considers the context of the speeches, such as audience considerations and the broader policy environment (Halperin and Heath, 2020). As this research focuses on how economic ideas are communicated and justified, it is crucial to interpret statements within their political and rhetorical context, which can be lost in alternative methods like a content analysis. Second, this method provides a systematic way to assess what economic arguments are used and how they are deployed. By comparing these arguments to academic literature, the coding frame helps identify patterns of strategic or selective use of information, aligning with the dual research objective. Third, by comparing two administrations, it is possible to assess any partisan and ideological differences, considering how these influence how economic information is used to legitimize tariff policies. This method allows for an analysis without requiring speculative assumptions about internal beliefs, but instead, it looks at the context of the speeches and the framing of the arguments by each party.

4.2.2   Case selection

This research examines how economic information is used by American presidents to justify tariff policies, focusing on two administrations: Donald Trump (2017–2021) and Joe Biden (2021–2025). The cases are selected based on the independent variable, which is party ideology.

As the U.S. is a two-party system, the cases were selected to represent each political party. This enables a direct comparison of how differing party ideologies influence the content and framing of economic justifications for tariff policies. The Trump and Biden administrations were specifically chosen because prior to Trump's first term, party positions on trade were more stable and aligned with well-established interest groups (Bowen et al., 2022). As one of the objectives of this research is to understand the economic justifications after the ideological shift, only the Trump and Biden administrations are analyzed. The level of analysis is the executive branch, including both the President and their U.S. Trade Representatives. Including the Trade Representatives provides a more comprehensive data set, as they have an important role in publicly justifying tariff decisions (Office of the United States Trade Representative, n.d). As the case comparison spans over the full term of each administration rather than a single moment, it enables an analysis of both continuity and change in the economic discourse surrounding tariffs.

4.2.3   Data selection and collection

The data for this research is primarily derived from public speeches, but press statements, interviews, and congressional testimonies are included to increase the number of observations. These sources are most appropriate for the analysis as they reflect the public strategic communication to voters by the American executive branch, providing insight into how economic rationales are used in public political communication. The data collection strategy is through publicly available archival sources, including a combination of the White House archives, TIME magazine, and C-SPAN. C-SPAN is a non-profit organization that provides unedited coverage of political events like speeches to promote transparency (Mixon et al., 2001). Including C-SPAN is necessary because many official government archives are occasionally incomplete or removed. Additionally, transcripts from TIME magazine are used when the transcripts cannot be found on governmental archival websites. Ad fontes media (n.d.) rates TIME magazine as a reliable source for analysis.

To select the data sources, a purposive sampling strategy was used based on the following inclusion criteria: (1) it contains explicit references to their tariff policy decision; (2) it includes their economic justification or rationale for these policy decisions; and (3) it is an official communication directed at a public audience. While effort was made to compile a comprehensive dataset, it is possible that certain relevant communications are missing due to

gaps in the publicly available archives. Nonetheless, the available documents that meet the selection criteria have been included, which are presented in Table 1.

Table 1: Data selection

Date	Title	Context
Trump		
September 2018	**81-minute press conference** (Trump, 2018a)	Trump defends the tariffs imposed on China.
October 2018	**Remarks on USMCA** (Trump, 2018b)	Trump announced the outcome of the NAFTA renegotiation to USMCA.
March 2019	**CPAC Speech** (Trump, 2019)	Trump defends the China tariffs again and explains his trade vision towards China.
January 2020	**Davod (World Economic Forum)** (Trump, 2020a)	To an international audience, Trump explains phase one of the China deal resulting from tariff escalations.
February 2020	**State of the Union** (Trump, 2020b)	Explains and justifies phase one of the China deal.
September 2020	**Press Conference** (Trump, 2020c)	Explains and justifies phase one of the China deal by answering press conference questions.
Biden		
October 2021	**Biden-EU Steel/Aluminum Tariff Deal Announcement** (Biden, 2021)	This is the first change in tariff policy after Trump's presidency, where Biden removed some tariffs on the EU.
April 2024	**USTR Katherine Tai Testimony (**U.S. House of Representatives, 2024)	This is a testimony to Congress, articulating the tariff stance on maintaining certain tariffs imposed by Trump.
May 2024	**Biden "Investing in America" Remarks** (Biden, 2024)	Biden announced tariffs on Chinese goods including electric vehicles, solar cells, lithium-ion EV batteries, steel, aluminum, and medical supplies.
June 2024	**TIME Magazine Interview** (TIME, 2024)	Explains and justifies the tariffs on China through interview questions.

4.3 Operationalization: Motivated reasoning

Motivated reasoning is the process by which individuals evaluate and use information in a biased manner that is in line with their pre-existing beliefs, identities, and ideologies. Whereas some scholars examine the subconscious bias for accuracy goals, this research is concerned with the directional goals of individuals, which is the deliberate use of information to support a preferred conclusion (Kunda, 1990). This research analyzes directional motivated reasoning as the context is public political communication, where political figures justify policies to audiences using economic arguments. Additionally, this research distinguishes strategic and selective motivated reasoning. This is crucial for this research as economic indicators are often complex and ambiguous. Therefore, these can be selectively used by do not portraying the full argument, or these can be presented misleadingly (Moynihan, 2006). This distinction enables more precise coding and prevents overgeneralizing political selectivity as motivated reasoning. By separating these forms, the analysis can assess not just whether bias exists, but also whether it functions through omission or distortion, which helps identify deliberate, directional motivated reasoning.

The first type is *strategic motivated reasoning*, where individuals intentionally frame information to support their pre-existing beliefs, even if the data is unrelated (Nielsen and Baekgaard, 2013). This is done by oversimplifying or misrepresenting information to support their claims. In this research, strategic motivated reasoning is identified when economic indicators are cited in ways that clearly contradict established findings in the academic literature (see Section 5.1.1). By comparing statements in speeches with academic literature, this approach captures how economic data is manipulated to construct a persuasive argument on tariff decisions.

The second type is *selective motivated reasoning*. This occurs when individuals selectively pick subsets of information that support their claims, instead of using the economic indicators comprehensively. In the tariff context, selective motivated reasoning is observed when a politician discusses an economic indicator but emphasizes only the aspects that support their policy decision, omitting relevant negative effects. To assess this, a structured table (see Section 5.1.2) is used that maps tariff-related economic indicators into "A" (positive effects of more tariffs) and "B" (negative effects of more tariffs). If an argument only includes either A or B,

without acknowledging the other side, the statement is coded as selective motivated reasoning, while considering that the omitted side is relevant and salient in the broader discourse.

This research differentiates motivated reasoning from routine political selectivity, meaning that not every instance of simplification or emphasis is considered evidence of bias. Politicians may reasonably prioritize some arguments over others due to time constraints, audience considerations, or issue salience. Motivated reasoning is coded when there is a patterned, goal-directed use of information that reflects a clear intent to favor a particular conclusion while excluding or distorting other relevant considerations. For example, if a speech focuses on labor impacts, omitting innovation effects is not necessarily motivated reasoning. However, if it highlights employment gains in upstream sectors while ignoring well-known negative effects in downstream industries, it is coded as motivated reasoning. Thus, the context of the speeches is considered to prevent that all omissions are coded as evidence of motivated reasoning.

4.4 Reliability and validity

To evaluate the robustness of the findings, it is important to reflect on the reliability and validity of the methodological approach. The reliability is moderate due to the subjective and interpretive nature of a qualitative discourse approach and because the coding is done manually by a single coder (Halperin and Heath, 2020). However, steps were taken to reduce this limitation by establishing a clear coding frame and conducting multiple rounds of coding to refine categories and improve consistency. Content validity, concerned with whether all aspects of a concept is covered, is strengthened through an inductive approach in the initial stage of analysis, which allowed for relevant economic justifications to emerge directly from the data (Toshkov, 2016). This reduced the risk of overlooking important categories and ensured that the coding frame reflected the discourse itself rather than being predetermined. The construct validity is high, as motivated reasoning was operationalized by differentiating between strategic and selective forms. This distinction enables more nuance in observing motivated reasoning and prevents overgeneralizing the occurrence of bias. The external validity is limited due to the use of only two cases in one country. Therefore, the findings might not be entirely generalizable to other political systems or contexts (Toshkov, 2016). However, since part of the aim of this research is to understand what economic justifications the Democrats and Republicans used post-2016, the generalizability of those findings is not the primary objective.

5. Results

This chapter presents the empirical findings of the research, structured in three main parts. First, Section 5.1 introduces the indicators that were identified through an inductive qualitative coding process, and for each indicator, relevant economic literature is presented to establish a baseline understanding of the indicator's empirical relation to tariffs. Second, the findings from the qualitative discourse analysis are presented by outlining what argumentation was frequently used, and to what extent this was strategic and selective motivated reasoning, considering the context of the speeches. Third, a comparative overview of both administrations' argumentation is provided in a summary table.

5.1 Descriptive overview of economic data

This section presents the indicators identified through the inductive coding process of presidential speeches, where recurring economic arguments were categorized into specific themes. Each indicator is contextualized with insights from academic literature to assess the validity of its connection to tariff policy. The section is structured in three parts. First, the strategic indicators are presented, which include (1) "Trade deficit", (2) "Export competitiveness", and (3) "Economic growth expressed through the stock market". According to academic literature, these indicators are frequently used by political figures in ways that oversimplify or misrepresent their relevance to justify tariffs. Second, the selective indicators are presented in a table, which includes (4) "Domestic supply chains", (5) "Employment rate", (6) "Wages", and (7) "Innovation". These indicators are ambiguous and can be selectively used to argue for the advantageous and disadvantageous effects of tariffs on that indicator. Third, a short description of the non-economic indicators that are not framed strategically or used selectively is presented to also show what other arguments for tariffs have been used to justify tariffs, being both political and economic tools. These include (8) "National security", (9) "IP-theft", and (10) "Strategic tools for negotiation". In the deductive coding process, the outline of these indicators is used as the coding frame.

5.1.1 Strategic indicators

<u>1: Trade deficit</u>

Trade deficits mean that there is more money exported than imported due to trade, so a deficit in the trade balance (Irwin, 2018). When a country imposes a tariff on the products of another

country, it makes imported goods more expensive, decreasing the demand for such products. This implies that the import of goods is reduced, so less money is exported. On paper, tariffs decrease the overall trade deficit (Irwin, 2018). Trade deficits are easy to explain to the public as "losing money to other countries" narratives, which frames trade deficits as a household budget problem (i.e., we spend more than we make). This frames a trade deficit as the U.S. being taken advantage of or that other countries are winning at the expense of the U.S (Lester, 2016; McGee, 1996). By using trade deficits as a justification for tariffs, it is inferred that the U.S. is fighting back against this loss. However, scholars emphasize that trade deficits are not inherently bad. Instead, trade deficits reflect global investment flows as countries with a trade deficit often have a surplus in investment flows, driving up the value of the U.S. dollar (Alessandria, 2007; Griswold, 2005; Irwin, 2017). This makes imports cheaper for U.S. consumers and strengthens the economy, which attracts more foreign capital, often increasing the trade deficit (Griswold, 2005). Therefore, the usage of trade deficits to justify tariffs involves an oversimplification of trade balances, presenting it in a misleading way.

2: Export competitiveness

Tariffs do not directly increase exports as they are tools to restrict imports, giving U.S. businesses a competitive advantage domestically, but not on international markets (Tokarick, 2006). Exports grow when foreign demand increases, which tariffs do not cause. Therefore, exports depend on access to foreign markets, which can be gained by maintaining competitive pricing and lowering trade barriers, which occur when the foreign country reduces tariffs (Cali and Montfaucon, 2021; Jørgensen and Schröder, 2006). Moreover, imposing tariffs can increase chances of retaliation, reduce trust and stall negotiations, which can delay or prevent improved market access (Ignatenko et al., 2025; Hunt et al., 2020; Auray et al., 2025). Tariffs increase the price of imports, which U.S. businesses can be reliant on as part of their supply chain (i.e., intermediate goods), making their products more expensive, leading to a reduction in export competitiveness (Auray et al., 2025; Contractor, 2025). Therefore, using export competitiveness arguments to justify the increase of tariffs is misleading information, so when used, it is coded as strategic motivated reasoning.

3: Economic growth expressed through the stock market

Economic growth is often expressed through the stock market. However, attributing the stock market growth as a consequence of imposing more tariffs reflects flawed reasoning based on correlation rather than causation (Amiti et al., 2021). Major drivers of stock market growth

included the 2017 corporate tax cut, low interest rates from the Federal Reserve, and strong labor market and consumer spending (Kopp et al. 2019). Tariffs typically increase uncertainty and risks retaliatory tariffs, both of which decrease investor sentiment (Selmi et al., 2020). Therefore, scholars argue that markets have risen despite tariffs, not because of them (Chen et al., 2023; Selmi et al., 2020; Amiti et al., 2021; McCarthy, 2019). Therefore, using stock market performance to justify increasing tariffs constitutes strategic reasoning, as it misrepresents the macroeconomic effects that occur from tariffs.

5.1.2 Selective indicators

Table 2 presents the indicators that can be presented in two ways. Column "A" reflects arguments that present the positive effects of increasing tariffs, while column "B" reflects the negative effects of increasing tariffs. The effect of reducing tariffs would be inverted (i.e., "A" would be the negative effects of reducing tariffs).

Table 2: Selective economic indicators

Indicator	Positive effect of tariffs on indicator	Negative effect of tariffs on indicator
4: Domestic supply chains	**A:** Tariffs make foreign competitors less competitive on the U.S. market, resulting in U.S. companies gaining a competitive advantage. This means U.S. businesses can increase output domestically. Additionally, more aspects of the supply chain move to the U.S. as they have an incentive to circumvents the tariffs, so domestic producers have more profits (Eugster et al., 2022; Chae et al., 2019).	**B:** Tariffs increase prices of imported goods, leading to higher prices for consumers. Since foreign production is often cheaper, tariffs eliminate those cost advantages. Consumers then pay more for both foreign products and American made products that rely on imported intermediate goods. (Rogers et al., 2024; Grossman et al., 2024; Chae et al., 2019).
5: Employment rate	**A:** As tariffs raise cost of imports, they protect domestic industries from foreign competition. This allows U.S. produces to expand production and hire more employees. This is the case primarily in upstream industries, meaning products at the beginning of the supply chain like raw materials. (York, 2018).	**B:** Tariffs can decrease employment in downstream industries, meaning industries at the end of the supply chain like finished goods. Industries that rely on imported inputs suffer from tariffs as it raises production cost. This reduces competitiveness leading to job losses. Moreover, countries often retaliate with tariffs, targeting U.S. exports, which can lower demand for U.S. goods abroad causing more job losses in export-dependent sectors (York, 2018; Contractor, 2025).

6: Wages	**A:** Tariffs can increase wages in protected industries by increasing domestic production and demand for labor. When tariffs reduce foreign competition, U.S. producers may experience higher sales and profits, enabling them to expand operations and offer better compensation (York, 2018; Galiani and Porto, 2010).	**B:** Tariffs can suppress wages in industries that rely on imported inputs or that are exposed to retaliatory tariffs. These factors can reduce profit margins, limiting the employers' ability to raise wages or forcing them to cut labor costs. Furthermore, if tariffs raise overall consumer prices (inflation), real wages decline (York, 2018; Contractor, 2025).
7: Innovation	**A:** In emerging or strategic sectors (e.g., green energy, semiconductors), tariffs can shield domestic firms from overwhelming foreign competition. This protection gives them time to invest in research and development, and scale up before competing globally. If tariffs cut off access to key imports (e.g., in a trade war), firms may invest in domestic alternatives, increasing innovation opportunities (Zhao et al., 2021; Contractor, 2025).	**B:** Tariffs can reduce competitive pressure, resulting in domestic firms having less urgency to innovate. Over time, this leads to inefficiency and technological stagnation. Firms that compete internationally are forced to innovate to survive. Tariffs can create a "sheltered market" where companies don't have to keep up with global standard, reducing innovation incentives (Chen et al., 2021; Contractor, 2025).

5.1.3 Non-economic indicators

Below are non-economic arguments that have been repeatedly used to justify tariff decisions and are not included in the coding process for observing motivated reasoning. However, these are included during the coding process for understanding what arguments are used, which allows for a comprehensive understanding of how much non-economic justifications are used compared to economic arguments.

8: National security

Tariffs can protect domestic production of goods that are important for security reasons (e.g., steel, semiconductors, pharmaceuticals). Reducing reliance on imports, especially from rival or unstable countries, helps ensure self-sufficiency during crises, wars, or supply chain shocks (Fandl, 2020).

9: IP-theft

Tariffs can be used to prevent intellectual property (IP) theft by pressuring countries to change unfair trade practices, such as forced technology transfers and cyber intrusions to business

information, and encourage supply chains to shift to the U.S. to reduce reliance on other countries (Lan, 2020).

10: Strategic negotiation tool

Tariffs can be implemented to pressure countries to change their labor and environmental standards or as leverage in trade talks to open markets or end subsidies (Cunningham, 2019).

5.2 Findings: Tariff justifications and motivated reasoning

Building on the indicators established in Section 5.1, this section reveals the findings of the qualitative discourse analysis, presenting evidence of motivated reasoning and what indicators are most frequently used by each administration, followed by a comparison of the findings. Given that the findings of a discourse analysis must be considered within context, frequency counts should not be interpreted in isolation. Nonetheless, the tables showing the frequency of observations from both Trump and Biden are included in the Appendix to ensure transparency in the research process.

5.2.1   Findings: the Trump administration

Across the speeches, Trump consistently engaged in both strategic and selective motivated reasoning to justify tariff decisions. Non-economic arguments, which include national security, IP-theft, and strategic negotiation arguments, were mentioned, yet only accounted for less than 18% of the total arguments. One of the most frequent arguments used throughout the speeches is "trade deficits". The trade deficit was repeatedly used as a problem statement, which tariffs would pose a solution to. Trade deficits were used strategically to illustrate how the U.S. was losing money to its trade partners, for example: *the United States, in its trade deals, has lost, on average, almost $800 billion a year. That's dealing with China, dealing with European Union, (inaudible) — with everybody. Japan, Mexico, Canada — everybody. And we're not going to allow that to happen."* (Trump, 2018b). Similarly, regarding justifying more tariffs on China: *"We've lost so much money with China — $500 billion a year. And on trade, it's such a disaster; it's $507 billion a year. China — just one country. We lose with everybody, almost. But China is one country. $507 billion, for many years."* (Trump, 2019). This framing casts trade policy not as a mutual economic exchange but as a form of economic combat, which justifies tariffs as a defensive correction.

Beyond trade deficits, Trump also repeatedly framed tariffs as a means to enhance export competitiveness and linked tariff policy to stock market performance, which is economically misleading. In the January 2020 international address, Trump claimed that "*U.S. stock markets have soared by more than 50 percent since my election, adding more than $19 trillion to household wealth, and boosting 401(k)s, pensions, and college savings accounts for millions of hardworking families*" (Trump, 2020a), attributing this growth to his tariff policy. This reasoning conflates correlation with causation, as other macroeconomic drivers such as low interest rates are omitted. Moreover, the argument that tariffs enhance export competitiveness has been frequently used. Export competitiveness would increase when trade agreements reduce tariffs, yet in the context of the U.S. increasing tariffs, this argument is misleading. He argued that increasing tariffs on Canada and Mexico will "*massively boost exports for our farmers, ranchers, and factory workers*" (Trump, 2020b). Together, the economic indicators of trade deficits, stock market performance, and export growth were repeatedly used to create a simplified narrative to justify tariff decisions.

Besides strategic reasoning, other economic arguments were frequently used in a selective manner. The most common arguments used by Trump are employment rates and domestic supply chain justifications, which emphasize the sectors benefiting from the tariffs, namely the agricultural and manufacturing sectors, yet omit the harms to other sectors from tariffs. For example, the steel and aluminum tariffs were justified by focusing on upstream industries, meaning that the manufacturing workers and businesses would benefit from these tariffs. For example: "*This deal will also impose new standards requiring at least 75 percent of every automobile to be made in North America in order to qualify for the privilege of free access to our markets. […] It means, more than anything else, far more American jobs. And these are high-quality jobs.*" (Trump, 2018b). This reasoning is selective because it highlights only the positive outcomes for certain groups while consistently excluding the economic impact these tariffs have on businesses and employment in downstream sectors. Overall, employment in manufacturing industries was emphasized, and there was no acknowledgement of how tariff-related cost increases could harm businesses dependent on imported goods as part of their supply chain, the job losses in those businesses, or how consumers might face higher prices. Additionally, while less frequently used, innovation arguments were made to argue that tariffs increase innovation, yet there was no acknowledgement of business competitiveness reduction potentially reducing innovation efforts: "*It (=tariffs) will bring our trading relationship with Mexico and Canada into the 21st century, and it will protect America's competitive edge in*

digital and innovation across the economy" (Trump, 2018b). Overall, these arguments presented tariffs as beneficial, while not mentioning the significant trade-offs of tariffs.

While Trump's economic justifications were mostly presented through strategic and selective motivated reasoning, the intensity of motivated reasoning varied by the speech context. In the January 2020 speech, Trump spoke to an international audience at the World Economic Forum. This speech included many employment rate and wage increases arguments, yet in a broader and less sector-specific manner: *"In the eight years before I took office, over 300,000 working-age people left the workforce. In just three years in my administration, 3.5 million people have joined the workforce. Ten million people have been lifted off welfare in less than three years."* (Trump, 2020a). Although trade deficit and stock market arguments appeared, it was less prominent than in other speeches, and the emphasis shifted more toward national security arguments. In contrast, speeches that announced the trade plans in 2018 and speeches during the election campaign in 2020 included mostly strategic and selective arguments.

5.2.2 Findings: the Biden administration

Biden generally refrained from strategic framing of economic indicators and used non-economic arguments around 19% of the time, mostly regarding IP-theft. Selective reasoning did occur frequently, yet less often overall. Earlier Biden speeches were done in the context of removing and reducing tariffs, whereas later speeches were related to increasing tariffs.

In October 2021, Biden gave a speech to international leaders and the global public about removing Trump's steel and aluminum tariffs on the EU. Biden focuses primarily on both domestic supply chain and employment rate arguments. The employment rate argumentation only selectively included the benefits of removing tariffs on increasing employment in environmental sectors, yet no mention was made in this speech on how reducing tariffs can make manufacturing jobs in the U.S. uncompetitive due to higher labor prices. The domestic supply chain argumentation was non-selective, as both lower consumer costs and supply chain resilience were addressed: *"It immediately removes tariffs on European Union - on the European Union on a range of U.S. products and lowers cost to American consumers. It ensures a strong and competitive U.S. steel industry for decades to come and creates good-paying union jobs at home […] when I think climate, I think jobs"* (Biden, 2021)

The speech in April 2024 was in a different context, addressing both the maintenance of most Trump-era tariffs and the removal of some. Justifications centered primarily on domestic supply chains, while mostly emphasizing the benefits of tariffs for U.S. businesses, the impact on consumer prices was also repeatedly used, making it a non-selective use of the domestic supply chain argument: *"It (=tariffs) is also a critical tool for building robust supply chains that lower costs for American families"* (U.S. House of Representatives, 2024). Besides supply chains, employment rates as an indicator have been frequently used, often alongside argumentation on increasing wages. Labor arguments were used both to emphasize why tariffs are good in increasing jobs, but also noting the importance of reducing tariffs for free market competition, benefiting employees: *"We will continue to level the playing field for American workers and businesses. We are vigorously enforcing our trade agreements, defending American jobs, and making sure more people enjoy the benefits of trade."* (U.S. House of Representatives, 2024).

The domestic supply chain and employment indicators in this speech were not used selectively, as maintaining tariffs for protectionism is not justified as being inherently superior to free trade. Instead, Biden's argumentation acknowledges the benefits of free trade while simultaneously justifying protectionist measures as a necessary response to unfair trade practices of China. The justification does not reject free trade but critiques its benefits under unfair trade conditions. As such, arguments for protectionism are presented alongside recognition of what free trade can offer under equitable conditions, making the use of indicators non-selective, for example: *"The PRC also uses unfair policies and practices to concentrate production of certain goods in the PRC, which undermines supply chain resilience and harms consumers that, in the long run, are deprived of the innovation and choice that fair competition would produce."* (U.S. House of Representatives, 2024). This quote also emphasizes that innovation indicators are used non-selectively, as they explain that free trade competition enhances innovation, but unfair trade undermines it, making tariffs necessary.

However, the lack of selective reasoning changed in mid-2024 during the election campaign. In May and June, Biden announced several new tariffs on Chinese imports, including electric vehicles, steel, and solar cells. Biden primarily used domestic supply chain indicators paired with national security argumentation, emphasizing the need to protect American businesses against China's cheap prices. In contrast to earlier speeches, consumer prices were

omitted from this justification: *"Next, a 100 percent tariff on electric vehicles made in China. And people say, "Wow." Because we're not going to let China flood our market, making it impossible for American automakers - automobile - auto manufacturers to compete fairly."* (Biden, 2024). However, only when Biden provided counter arguments to the Republicans' plan to impose unilateral tariffs, consumer prices are mentioned, highlighting the selective use of domestic supply chain and consumer price arguments when justifying tariffs: *"And now, Trump and his MAGA Republicans want across-the-board tariffs on all imports from all countries, if reelected. Well, that would drive up costs for families on an average of $1,500 per year each year. He simply doesn't get it."* (Biden, 2024). Moreover, when Biden was asked about his tariffs increasing consumer prices, he disregarded it, blaming corporate America instead: *"Wage increases have exceeded what the cost of inflation, which you're talking about as the prices that were pre-COVID prices. Pre-COVID prices are not the same as whether or not they—you have American, corporate America ripping off the public now."* (TIME, 2024).

5.2.3 Comparing the Trump and Biden administrations

Table 3 summarizes and compares how Trump and Biden justified their tariff decisions. Trump's justification of tariff decision included the frequent use of strategic motivated reasoning, particularly regarding using trade deficit justifications, but also by crediting his tariffs to stock market gains and enhanced export competitiveness. In contrast, Biden generally avoided strategic framing of economic indicators to justify tariffs, except for a single reference to trade deficits. Regarding selective reasoning, both Trump and Biden engaged in it, yet to a different extent and depending on context. Trump primarily used employment indicators and domestic supply chain indicators in a selective manner, as the benefits for agricultural and manufacturing industries were emphasized, yet the impact on other industries was ignored. Biden primarily focused on domestic supply chain argumentation, followed by employment indicators, but the selective usage of these indicators depended more on context. When Biden argued for more tariffs, the selective usage of indicators was similar to Trump, yet when justifying which Trump tariffs should be maintained and revoked, the use of these indicators was non-selective.

Table 3: Summary of the findings

Category	Trump	Biden
Strategic Motivated Reasoning	Frequently used. Primarily trade deficit, followed by stock market performance and export competitiveness.	Rarely used. Trade deficit mentioned only once, and no misleading use of stock market or export competitiveness.
Selective Motivated Reasoning: Employment & Wages	Employment and wages frequently cited in relation to sectors directly benefiting from tariffs (e.g., steel, agriculture), with no mention of negative effects on downstream industries.	Employment discussed more broadly, emphasizing fair competition and free market benefits. Tariffs framed as tools against unfair practices (e.g., labor conditions in China), not against labor market competition itself.
Selective Motivated Reasoning: Domestic Supply Chain	Justified as being inherently good. Tariffs justified as a way to boost domestic production, with no acknowledgment of resulting consumer price increases or impact on businesses reliant on imports.	Most frequently used indicator. In ~75% of cases, consumer price effects were omitted; in the remaining ~25%, price concerns were acknowledged. Reasoning partially selective, depending on context.
Selective Motivated Reasoning: Innovation	Infrequently used, but when mentioned, it was to argue that tariffs promote innovation by protecting domestic industries, without addressing the risks of reduced competitive pressure.	Infrequently used, but when mentioned, it emphasized the importance free trade for innovation, under the condition that trade is fair.
Non-economic Justifications	Accounted for less than 20% of the arguments. Indicators of national security, IP theft, and strategic negotiation were used in similar frequency, and mostly to counter China's aim to make the U.S. dependent on Chinese goods.	Accounted for less than 20% of the arguments. The indicators of national security and negotiation tools were mostly used in relation to China's unfair practices and environmental standards. IP-theft argument most frequently used.

6. Discussion

6.1 Connection to the literature

This research sought to understand how party ideology both influences *what* types of economic information are used and *how* this information is used to justify tariff decisions. To answer the research question on how party ideology influences the use of economic information by American Presidents to justify their policy positions on tariffs, this research finds the following. Party ideology influences both the type and use of economic information in tariff justifications by American Presidents. Republicans, under the Trump administration, relied heavily on

selectively using employment and supply chain indicators, and strategically framing trade deficits to justify tariffs. Democrats, under the Biden administration, used domestic supply chain indicators partially selectively, employment rate indicators in a balanced manner, and did not engage in strategic framing of economic indicators. The next section connects the findings on what economic arguments are used to the existing literature, followed by a reflection on how the observed patterns of motivated reasoning align with the theoretical expectations and prior scholarly work.

6.1.1 The influence of party ideology on the type of economic indicators used

The literature highlighted a clear gap in understanding what economic information each party uses to justify tariffs, which the findings of this research fill. The traditional ideological division was that Republicans were generally aligned with export-oriented businesses, while Democrats appealed to labor unions, shaping their respective tariff stances (Bowen et al., 2022; Karol, 2000). However, since Trump's 2016 campaign, this alignment has shifted. Trump primarily justified protectionist tariffs using employment arguments, especially for the manufacturing and agricultural sectors. This diverges from the traditional Republican emphasis on free trade for export-oriented business interests, who often suffer from tariffs due to retaliation and reliance on imported goods. Additionally, Trump's repeated use of trade deficits, export competitiveness, and stock market gains aligns with research on how the complexity of economic information enables voter ignorance, allowing for these indicators to be misleadingly used (Blanchard et al., 2016; Rho & Tomz, 2017).

Democrats have remained more consistent with their positions on trade, as prior to 2016, they already favored protectionism. Their justification continues to appeal to labor and consumer interests, framing both free trade and protectionism as beneficial for employment depending on context. In particular, Biden acknowledged consumer prices when discussing supply chain shifts, which signals a more nuanced approach. Whereas scholars like Selmi et al. (2020) emphasize the use of national security justifications under Sections 232 and 301, this study finds that fewer than 20% of justifications from either president focused on non-economic factors like national security, IP theft, or negotiation. These findings validate criticisms from scholars that argue that the national security and fair trade rationales serve as pretexts for economic protectionism (Kim, 2019; Sracic, 2022). These findings illustrate that while Democrats have remained ideologically aligned with labor, Republicans under Trump realigned

from export-oriented business interests towards business and labor interests of the agricultural and manufacturing sector. This reveals a significant shift in how party ideology shapes economic discourse around tariff justification.

6.1.2 The influence of party ideology on motivated reasoning

The second objective of this thesis was to understand how this economic evidence is used to justify tariffs, using the theoretical lens of motivated reasoning. The findings revealed that both Trump and Biden engaged in motivated reasoning often. This supports Kunda's (1990) theory on directional motivated reasoning, where individuals select evidence in a biased manner to reach their desired conclusions. The findings of this research partially support the first theoretical expectation, which noted that American presidents present only the favorable aspect of economic data on tariffs and omit conflicting evidence. Trump mostly selected only the favorable aspect of the economic indicator, which is in line with the theoretical expectation. Biden also engaged in selective reasoning, but to a lesser extent and with more contextual variation. Therefore, it does not support the expectation that both presidents only select favorable elements of the economic indicators. Selective motivated reasoning occurred frequently when new tariffs were imposed and less often when these were removed or when the maintenance of the tariffs was justified. According to Christensen and Moynihan (2024), politicians have justification requirements to their voters, and due to these requirements, politicians increasingly engage in motivated reasoning. While all tariff decisions require justifications, imposing new tariffs might require more justifications, amplifying motivated reasoning.

The second theoretical expectation predicted that both presidents strategically frame economic indicators, which is only confirmed for Trump. Nielsen and Baekgaard (2013) argue that politicians have strategic motivations and are therefore less likely to use objective justifications, which is in line with Trump's repeated use of strategic framing of economic evidence. The discrepancy between Trump and Biden's use of strategic framing could be due to Trump having more consistent and strong political attitudes towards protectionism throughout his term, whereas Biden had less strong political attitudes and consistency throughout his term, treating tariffs as a more pragmatic and reactive issue. Lodge and Taber (2000) argue that people with stronger political attitudes engage in motivated reasoning more, which could explain why Biden used motivated reasoning strategies less than Trump.

Additionally, context matters, as the findings by Groenendyk and Krupnikov (2021) noted that debate contexts intensify motivated reasoning. Biden engaged more in motivated reasoning during the election campaign season, and Trump used less strategic framing of economic indicators when speaking to an international audience. The findings therefore note that the degree of motivated reasoning depends on context, which validates the argument by Groenendyk and Krupnikiv (2021). Overall, the findings support prior conclusions of motivated reasoning theory, yet reveal important variations by party, context, and political intensity towards the issue.

6.2 Implications and policy recommendations

The findings of this research contribute to motivated reasoning theory by offering empirical evidence from a non-experimental setting. Additionally, the findings build on Groenendyk and Krupnikov's (2021) work as it provides empirical support that motivated reasoning is situationally responsive to context, instead of being constant over time. Furthermore, Trump, who held more consistent and strong ideological positions on tariffs, engaged more in motivated reasoning than Biden, who held a less strong and consistent position on tariffs, which provides more evidence that stronger prior attitudes intensify motivated reasoning. The strength of attitudes toward issues has been examined among voters, however, this research builds on this by providing evidence that it also applies at the presidential level. Lastly, whereas prior studies on motivated reasoning often blur the distinction between strategic and selective motivated reasoning, this research studies these concepts separately, which adds nuance to how motivated reasoning is performed.

The findings also have important implications in understanding the types of economic evidence used in tariff debates. Prior scholars questioned the rationale under Sections 232 and 301, and this research provides evidence that the economic rationale dominates by over 80% of the argumentation. Additionally, there was a lack of scholarship examining the difference between the political parties in what economic arguments they used to justify tariffs, which this research provides. It revealed that Trump views protectionism as inherently superior to free trade, whereas Biden considers the benefits of free trade, but on the condition of fair trade, using tariffs as a tool to enable an improved economic market for Americans.

These findings also have important societal implications. For voters, these findings offer more insight into the economic reasoning behind tariff policies, helping individuals assess which political party aligns more closely with their own economic interests. These findings also reveal which economic groups the argumentation aims to appeal to. Trump's justification was often sector-specific to upstream sectors, and Biden often justified maintaining Trump's tariffs towards businesses and employees affected by China's unfair trade practices. Moreover, these findings highlight the societal implications of how politicians can strategically frame economic indicators to justify tariff decisions, revealing that indicators like trade deficits and export competitiveness are often used in ways that suggest problems tariffs cannot meaningfully address. Finally, improving the understanding of motivated reasoning in tariff justifications is essential to increasing political accountability, as it enables critical evaluation of the economic justifications used by presidents.

Based on these implications, two policy recommendations emerge. First, increasing the availability of public education on trade policy, including how tariffs work, can raise awareness on how such measures affect economic conditions for Americans, such as consumer prices and employment. Due to the complex nature and significant influence of tariffs, improved public understanding can enable voters to evaluate political claims. Second, the establishment of an independent fact-checking body for presidential speeches is recommended. Such institution could provide annotated transcripts of political speeches and identify misleading use of evidence, which would increase transparency and accountability in policy discourse.

6.3 Limitations and future research

While the findings provide much insight, this research is also met with limitations. Theoretical limitations include that motivated reasoning scholarship often focuses on how individuals process and use information, yet this prior scholarship often does not fully capture the institutional constraints on communication by political elites. Therefore, the findings are valid for understanding public argumentation but do not explain internal policymaking motivation, making the conclusions limited to motivated reasoning on rhetorical performance, not genuine belief. Moreover, while the distinction between strategic and selective motivated reasoning adds clarity, the boundary between them is often blurred. Prior studies tend to treat motivated reasoning as a single concept, making this binary distinction relatively underdeveloped.

There are also methodological limitations to this research. Firstly, as this study uses a qualitative analysis of political discourse, the coding involves subjective judgment by a single coder, so the results may be influenced by researcher bias. This limitation is addressed by doing multiple rounds of coding to refine categories and improve consistency, yet subjectivity cannot be excluded completely. Secondly, the sample of speeches is limited, and more observations from Trump's speeches were included compared to Biden's, due to the availability of speeches. Therefore, this sample may not fully represent the breadth of each administration's communication on trade policy. Thirdly, the external validity of this study is limited to the U.S. presidential context, so it might not be very generalizable to other political systems or actors.

To address the limitation of limited generalizability, future research could conduct a cross-country study that employs the same research design yet compares the ideological differences in different political systems. Analyzing this in different democracies could enrich our understanding of motivated reasoning by exploring the influence of different institutional constraints or electoral incentives in affecting the use of motivated reasoning in trade policy justifications. Moreover, as the boundary between strategic and selective motivated reasoning is conceptually blurry, an experimental research design could be used, where information is manipulated to be either complete or partial, and observe how participants frame this information. This could help clarify to what extent strategic and selective reasoning can be empirically separated.

7. Conclusion

This thesis examined how party ideology influences the use of economic information by American Presidents when justifying tariff policy decisions. By analyzing the public speeches under the Trump and Biden administrations, this research aimed to understand what types of economic indicators are used and the extent to which these were employed through selective and strategic motivated reasoning. The findings reveal that Republicans frequently use strategic framing of economic indicators like trade deficits and engage in selective motivated reasoning, particularly on employment rates and domestic supply chains in the agricultural and manufacturing sectors. Democrats under Biden do not frequently use strategic framing of economic evidence but instead use indicators like domesticating supply chains selectively, yet to a lesser extent than Republicans.

These findings matter for multiple reasons. They advance our understanding of motivated reasoning by showing how it is used in real presidential communication. Additionally, it contributes to trade policy research as it reveals that traditional interest group alignments no longer fully explain the different party positions on tariffs. Moreover, this research challenges the common perception that tariff policy is driven by national security concerns, as it reveals that the majority of justification is economic. Lastly, this study adds nuance to our understanding of motivated reasoning by revealing that it is dependent on context, such as audience considerations and electoral campaigns.

Tariffs are currently a politically salient issue, and the underlying economic data is often complex. This makes the research highly relevant, as it improves our understanding of how economic narratives are communicated to voters. By clarifying these processes, this research offers a valuable foundation for future public administration research on political motivated reasoning and public communication in the context of trade policy discourse.

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Appendix

The tables below present the findings of the discourse analysis in terms of the quantity used. As it is a discourse analysis, the simple quantity is not very useful. The findings in the "total" column are relevant for understanding what indicators were most frequently used. However, to understand the occurrence of motivated reasoning, the observations must be considered within the context of the speeches and how they relate to other arguments. While the tables do not visualize motivated reasoning, it is included for transparency reasons.

To explain the table, here is what the numbering means. Every strategic indicator is coded under "0". Every selective indicator is coded under either "1a" (referring to positive impact), "1b" (referring to negative impact), or "1a+b" (referring to a non-selective use of the indicator). All non-economic indicators are coded under "2".

Table 4: Trump discourse analysis results

Indicator	0	1a	1b	1a+b	2	Total
Trade deficit	13	-	-	-	-	13
Export competitiveness	3	-	-	-	-	3
Stock market	5	-	-	-	-	5
Domestic supply chain	-	18	-	-	-	18
Employment rate	-	23	-	1	-	24
Wage	-	2	-	2	-	4
Innovation	-	2	-	-	-	2
National security	-	-	-	-	6	6
IP-theft	-	-	-	-	5	5
Strategic negotiation tool	-	-	-	-	4	4

Note: this table includes 84 observations from six sources.

Table 5: Biden discourse analysis results

Indicator	0	1a	1b	1a+b	2	Total
Trade deficit	1	-	-	-	-	**1**
Export competitiveness	-	-	-	-	-	**0**
Stock market	-	-	-	-	-	**0**
Domestic supply chain	-	14	1	4	-	**19**
Employment rate	-	4	4	1	-	**9**
Wage	-	2	-	1	-	**3**
Innovation	-	-	1	1	-	**2**
National security	-	-	-	-	2	**2**
IP-theft	-	-	-	-	4	**4**
Strategic negotiation tool	-	-	-	-	2	**2**

Note: this table includes 61 observations from four sources.