

Putting Your Money Where Your Mouth Is: Expressions of Chinese Nationalist Sentiments Are Not Just Cheap Talk

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Abstract

Do nationalist expressions reflect a willingness to pay costs or are they cheap talk? This is important because in order for citizens' nationalism to have an independent influence on policy, such as in cases of territorial disputes or trade conflicts, then citizens must be willing to pay the costs of acting according to their expressed nationalist sentiments. Yet, past research has either relied on self reports that cannot rule out cheap talk or outcome measures at higher levels of analysis, such as international trade flows, that do not directly link individual-level nationalist sentiment to behavior. In contrast, we measure both nationalist sentiments and costly behavior on an individual level using the content of millions Chinese social media posts to measure nationalist sentiment and data on the nationality of the brand of device, for example type of cell-phone, users own as a costly behavioral measure. Further, we recover the causal effect

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that nationalist sentiment makes citizens less likely to use US and Japanese brands with an instrumental variable analysis.

5,903 Words

In a video uploaded to the Chinese website Meipai (美拍) on July 12, 2016, the day the Permanent Court of Arbitration in the Hague ruled against China’s claims in the South China Sea (Lu and Westcott 2016), a young Chinese man shows a close up of his iPhone, so that the viewer can verify that it is real. Afterwards, he tells the viewer to “watch” (看着) and smashes it with a hammer. Despite his Meipai account only having 68 followers, this video has been viewed over 550,000 times.¹ “Tomorrow, I will buy a Chinese one,” he says. In the video description, he makes clear that his motivation comes from what he views as “America taking the lead to violate Chinese territory” (美国带头侵犯我国领土). He calls on his “brothers and sisters to follow [his example] and smash [their iPhones]” (兄弟姐妹们跟起砸) and concludes his video description with 3 angry face emojis.

This was not an isolated incident. Other Chinese citizens also posted videos smashing their iPhones to express their anger over the ruling against China’s claims. Observers attributed this to “nationalist sentiments,” and some of these videos featured the claim that “if you don’t smash it, you’re not Chinese!” (French 2016). Chinese state media eventually condemned the protests of the tribunal’s ruling, which targeted American companies, including KFC, Apple, and McDonald’s (Lu and Westcott 2016). However, this is hardly the first dispute linking Chinese nationalist sentiments with opposition to foreign products. Neither has the Chinese government consistently opposed economic nationalism. For example, the Chinese government adopted restrictions on Australian wine in 2018, tourism to South Korea in 2017, and Norwegian salmon in 2010 amid foreign policy spats with these states (Taylor 2018).

Protesters’ willingness to pay the cost of destroying their phone signals the sincerity of their nationalist sentiments. In other words, by paying this cost, they put their money where

¹As of 1/21/2025, the video can still be viewed here: <https://www.meipai.com/media/548864916>.

their mouth is. However, relatively few Chinese went as far as smashing their iPhones in response to the court’s ruling.

Whether more typical citizens who express support for economic nationalism without participating in phone smashing or offline protests are motivated to pay the costs associated with this sentiment has important theoretical implications. Many theories argue that citizen nationalism affects key political outcomes ranging from international conflict to participation in political movements, such as boycotts, all of which entail significant costs for participants (Powers 2022; Ko 2023; Klein, Ettenson, and Morris 1998). However, approaches to both political economy and conflict that emphasize rationality question whether such nationalism is either merely cheap talk that will yield when pitted against tangible costs (Helleiner and Pickel 2005 vii; Zellman 2020).

This question also has implications for the broader influence of nationalism on foreign policy and government legitimacy. If nationalism inspires willingness to pay costs, this helps explain why nationalist legitimacy makes citizens more willing to tolerate the cost of a regime that is unsatisfactory in other ways (Zhao 2004; Gries 2005a; Wang 2012). However, if these expressions are not associated with willingness to pay costs, it would suggest that the Chinese government’s ability to rule rests more on rewarding loyalty and punishing deviance than nationalist legitimacy and that popular nationalist demands on the government are cheap talk rather credible threats to the regime’s support if it does not follow through (Quek and Johnston 2018).

Evaluating whether citizen expressions reflect willingness to pay costs is challenging because individual citizens are rarely required to pay a public cost for their expressed nationalist sentiment, meaning cheap talk is often observationally equivalent (Jia 2005, 12). Previous research has either relied on survey self-reports of outcomes such as boycott participation or willingness to support a hypothetical war, which, while informative, cannot rule out that responses reflect cheap talk, or costly behavior measures at higher units of analysis, such as war or decreased trade volumes between countries after an event inflames nationalists,

which cannot directly link individual-level nationalist sentiment to behavior. This risks committing the ecological fallacy by concluding that because a country where nationalists reside decreased trade volumes, nationalists are the ones driving this change (King 1997).

To address this, we adopt a unique research design that measures both nationalist sentiment and costly behavior on an individual level. We examine whether Sina Weibo posts expressing nationalist sentiment are more likely to be created with domestic rather than foreign brand electronic devices. Sina Weibo is a popular Chinese social media website that is similar to Twitter where users discuss a range of topics that occasionally includes politics. If citizens' expressions of economic nationalism reflect willingness to pay costs, then these citizens should be less likely to use brands from countries seen as harming China and more likely to use Chinese brands.

To identify the causal effect of nationalist sentiment on individual behavior, we exploit the exogenous timing of the leak of Japanese government plans to purchase the disputed Diaoyu/Senkaku Islands as an instrumental variable for observed online nationalist sentiment. We find citizens expressing nationalist sentiments are less likely to own Japanese or United State brand phones, indicating that nationalist sentiment does drive costly behavior.

This paper proceeds as follows. The first section discusses the theoretical basis of our expectations and explains our empirical contribution in the context of economic nationalism research. Section 2 discusses our data and estimation strategies, the potential impact of censorship and regime commentators on the data, and whether the instrument is truly exogenous. Section 3 presents the results, and the final section offers concluding comments.

1 Economic Nationalism

While scholars originally considered economic nationalism only in terms of state policy, its meaning has expanded to include a wide range of practices including protectionism, dumping of exports, and consumer antipathy towards foreign products (Baughn and Yaprak 1996,

761; Pickel 2003). Economic nationalism is theorized to influence these outcomes through its affects on individuals' cognitive frames, ideologies, and beliefs (Pickel 2003, 121).

A particularly important theory about nationalism's influence on individual behavior argues that it leads consumers to decrease their consumption of products from countries that these consumers perceive as opposed to their nation. This mechanism of economic nationalism's influence on trade is referred to as "animosity" (Klein, Ettenson, and Morris 1998). According to the animosity model, nationalist consumers avoid products from countries they see as having harmed their nation in the past because of nationalist sentiment rather than economic considerations, such as product cost or quality (Klein, Ettenson, and Morris 1998, 90). This animosity varies across individuals according the attitudes and beliefs.

Social pressure to conform to the group among national identifiers may also play a role in nationalist behavior (Jiang and Yang 2016, 623). For example, citizens who seek belonging in the nation may fear their peers will call them out for using a foreign phone. We draw on the self-categorization approach to social identity that argues that this social pressure mechanism is best conceptualized as part of the same phenomenon of individually felt emotional reactions rather than as a separate process (Abrams et al. 1990, 98). This is because group norms about how one should feel both shape and are shaped by the way group identifiers emotionally respond to events (Hogg and Reid 2006; Barsade and Knight 2015; Masterson 2024). Regardless of the mechanism, the key question is whether the collective effects of nationalist sentiments, through both individual motivation and social pressure, are significant enough to change behavior in costly situations.

H1 Animosity: Individuals high in economic nationalist sentiment will be *less likely* to consume products with brands associated with foreign countries viewed as having harmed their nation.

In contrast to animosity, nationalists might also have an affinity towards national products either because they want to purchase from in-group members or because they believe that such purchases will boost the national economy, which they care more about than the

economies of other countries (Shimp and Sharma 1987; Mutz and Kim 2017).

H2 Affinity: Individuals high in economic nationalist sentiment will be *more likely* to consume products from domestic brands.

In particular, nationalist movements and protests in China have been associated with calls to boycott Japanese goods in the 1930s, 1985, early 2000s, and 2012 (Reilly 2014, 212). The 2012 protests included calls to buy Chinese rather than Japanese cars. Yet, indicating that Chinese citizens are aware of the costs, some argued that boycotting Japanese goods would be too harmful to China’s economy (Reilly 2014, 213).

Scholars have provided two kinds of evidence for these animosity and affinity effects. The first set of evidence comes from surveys in which individuals self-report nationalist sentiment as well as either their consumption practices or trade policy preferences (Shimp and Sharma 1987; Klein, Ettenson, and Morris 1998; Pan and Xu 2018). Others have linked decreased trade volumes of foreign products to periods of tension between countries (Barwick et al. 2019; Davis and Meunier 2011; Heilmann 2016; Hong et al. 2011).

While valuable, both of these approaches have important limitations that raise questions about whether they can establish a causal effect of economic nationalism on individual preferences and behavior. Because survey responses are relatively costless, citizens may choose to express cheap talk nationalism if they think there is even the slightest chance their responses could be traced back to them. In the case of authoritarian countries like China this concern is particularly important because the incentive to signal loyalty is much higher than in democratic contexts (Jiang and Yang 2016; Kuran 1997). Even in democratic contexts, citizens who have reported high levels of nationalist sentiment might falsely report owning fewer foreign products in order to appear consistent (Schuman 1981, 27–28). Our point is not that these challenges prevent survey research from shedding light on nationalist sentiments. Instead, they highlight the importance of supplementing our understanding with measures linked to costly behavioral outcomes (Dickson 2011, 63).

However, studies measuring costly behavioral outcomes, such as trade flows, also face

limitations. While these studies clarify the stakes of nationalist boycotts, they do not measure individual-level nationalist sentiments or behavior. This means these studies cannot conclude that nationalist sentiment, which varies on the individual level, has caused these changes without committing the ecological fallacy ([King 1997](#)).

Further, most observational studies of nationalism that capture real-world costs lack an identification strategy to separate the effect of economic nationalism from unobservable confounds that could affect both economic nationalism and consumer behavior. Both nationalist expression and economic behavior are complex and can be affected by such a wide variety of events citizens experience and information they consume so that the assumption of selection on observables, which requires that all these factors have been measured and included in the model, is doubtful ([Keele 2015, 321](#)). We describe and carry out a research design below that addresses these issues.

While we have focused this review on the economic nationalism literature most directly related to our outcome, other research programs on nationalism’s ability to motivate costly action share this divide between individual-level studies that measure costless outcomes and state-level studies that cannot attribute these state-level outcomes directly to individual nationalist sentiments. In a review of the literature on nationalism and war, Powers and Ko ([2024](#)) summarize existing work by dividing it into micro studies that examine nationalism and individual attitudes towards war (which are costless to express) and macro studies that examine the state-level outcome of war. Our aim is to provide the first evidence that bridges the gaps between these studies by connecting individual-level nationalism to individual-level costly behavior, which would increase our confidence in a wide variety of theories about nationalism’s political effects.

2 Method

2.1 Weibo Data

Our data set is a representative selection of Weibo posts from August 13, 2009 to March 12, 2014. Zhang et al. (2015) originally collected these posts to study natural language processing, and Masterson (2024) coded them for expressions of national humiliation and support for raising barriers to trade. We create novel variables measuring the nationality of the brand of device that citizens used to create each post and the price of these devices for 473,781,480 of the original 1,676,535,827 posts. Addressing the concern that censorship may bias this data, Masterson (2024) finds that neither national humiliation or trade barrier content is associated with the probability a post is censored using 490,277 posts from 126,574 users that overlap with the WeiboScope data (Fu, Chan, and Chau 2013). We conduct a similar analysis in the appendix that finds that neither the treatments, outcomes, nor any interactions between the treatments and the outcomes predict whether a post is censored, suggesting that censorship does not bias our hypothesis tests. Since our data set ends in 2014, it not affected by recent campaigns to discourage state employees from using foreign phone at work (Reuters 2023).

As for regime commentators who in the course of working for the government create posts that appear alongside those of normal citizens, these posts attempt to distract readers from politics rather than motivate them to support particular policies or political actions (King, Pan, and Roberts 2017, 485). As the regime fears collective action, it seems doubly unlikely that regime commentators, who avoid politics, would advocate boycott movements (King, Pan, and Roberts 2013). Further, Masterson (2024) analyzes the leaked data set of regime commentator posts examined in King, Pan, and Roberts (2017) and finds that regime commentators do not discuss national humiliation or raising trade barriers. See Masterson (2024) for additional detail on the data set and steps taken to authenticate it.

2.2 Operationalizing Nationalist Sentiments

We treat economic nationalist sentiments as a latent variable that cannot be directly observed. However, we can observe *expressions* of these sentiments. Expressions may not correspond exactly with true sentiments because individuals may express sentiments they do not feel based on their beliefs about how others will respond to these expressions. However, as discussed in the Economic Nationalism section, we view both these individual sentiments and responses to social pressure as part of the same process through which nationalism may motivate costly action. We include two separate measures of economic nationalist sentiment from Masterson (2024)’s coding of the Fudan NLP data set to decrease the chance that our results are sensitive to how nationalist sentiment is measured. The first measure, **trade barrier** includes any posts that advocate boycotting or raising trade barriers against foreign goods, including posts that advocate the substitution of domestic goods for foreign goods.

The second measure, **national humiliation**, indicates whether or not a post contains a national humiliation narrative. National humiliation is a particularly important and prominent nationalist sentiment in China (Wang 2012; Callahan 2010). National humiliation narratives represent a foreign humiliator as inflicting injustice on the Chinese nation. This has ties to economic nationalism as research has found that Weibo posts that contain national humiliation narratives are more likely to advocate raising trade barriers (Masterson 2024). For more detail on how posts were coded see Masterson (2024) and its [appendix](#).

To examine animosity, we choose two countries that modern Chinese nationalists view as having harmed the Chinese nation, the United States and Japan. The United States is commonly viewed by Chinese nationalists as behind harmful events in world affairs. This can be seen everywhere from Chinese nationalists blaming the United States for instigating the war between Russia and Ukraine to American companies, such as Apple and KFC, bearing the brunt of Chinese nationalist ire for the court ruling described in the introduction in which the Philippines brought the case to a judicial body located in Europe (McCarthy 2022).

Despite the United States’ prominence as a potential great power rival to China, the

country that most provokes Chinese nationalist anger is Japan. This is a legacy of both the brutality of the Japanese military in the Second Sino-Japanese War as well as the Chinese government’s decision to emphasize this brutality in the media and education system (Gries 2005b; Wang 2012).

For affinity, we operationalize domestic brands as brands associated with China. However, we do not label brands associated with Taiwan as “Chinese” because while Chinese nationalists hold that Taiwan is a part of China, they also feel hostile towards the current political authorities in Taiwan. For this reason, they may not feel the same affinity towards Taiwanese brands as they do towards mainland Chinese brands.

2.3 Coding

Each post has a device string that provides information about the device used to create the post. For example, a post created by a Samsung Galaxy phone could have a string of ‘三星 Galaxy’, and a post created by an iPad might have a string of “iPad 客户端”. We use the device string to code both the nationality and price of the device. This is not possible for all device strings. For example, the most common device string is simply Sina Weibo (新浪微博), which provides no information about the device, and we omit these posts (see the Appendix for a discussion of the selection of posts into informative and uninformative device strings). However, we are able to code brand nationality and price for device strings that correspond to 473,781,480 posts. Next to 新浪微博, ‘iPhone 客户端’ is the second most common device string, making up about 17.5% of posts in the dataset.

Nationality is coded based on the recognizable nationality of the brand of the device rather than the country where the device is manufactured. For example, iPhone is coded as a United States brand even though many iPhones are manufactured in China because iPhone is recognized in China as a US brand. This is consistent with previous work on economic nationalism that emphasizes brands recognizable to consumers as foreign rather than the place of manufacture, which is less salient to consumers (Barwick et al. 2019).

Device prices are coded based on listed sell prices in China in 2014. More information about how nationality and price were coded is available in the appendix.

2.4 Empirical Strategy

The following describes how we conduct the hypotheses tests in the main body of the paper. We also conduct a descriptive analysis of the data in Appendix F. Our analysis estimates the causal effect of nationalist sentiment on the choice of device nationality, using an indicator for days on and after September 11, 2012 when the Japanese government purchased the Diaoyu Islands from their private owners as an instrument for nationalist sentiment ([Mainichi 2012](#)). This analysis only examines posts made one month before and after this date to decrease the chance that other events that took place in the time period analyzed after September 11, 2012 could confound the instrument while also providing a large enough time span that some individuals will have purchased new devices. However, we show in Appendix D that our results are generally consistent across different time windows.

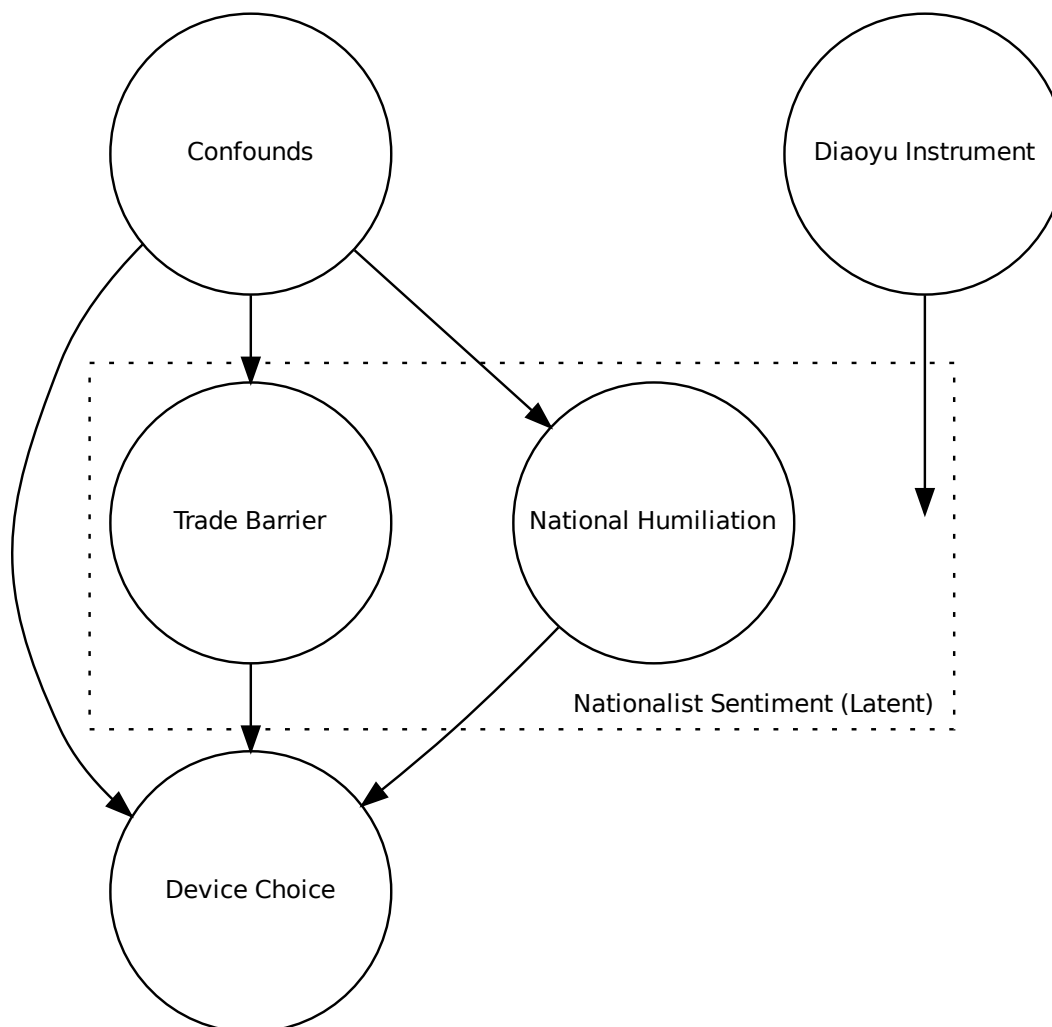
We show two-stage least-squares results, in which the nationality of the brand of the device used to create the post is the outcome variable, both with and without the control variables of price, post length (in characters), and income inequality. We follow Masterson ([2024](#)) by including an income inequality variable that measures whether a post discussed income inequality as a control for non-foreign-policy-related political discussion. We include user fixed effects to control for potential confounds that are constant across users, such as demographics and political orientations.

2.4.1 Instrument Justification

To be a good instrumental variable, our indicator for days on and after the day the Japanese government officially purchased the Diaoyu Islands must meet a few conditions. These conditions are depicted in Figure 1. Namely, there must be causal link between the instrument and nationalist sentiment, there must be no causal link between the confounds and the instru-

ment, and there must be no causal link from the instrument to the outcome of phone choice except through nationalist sentiment (the exclusion restriction). Each of these conditions is discussed below.

Figure 1: Identification Strategy

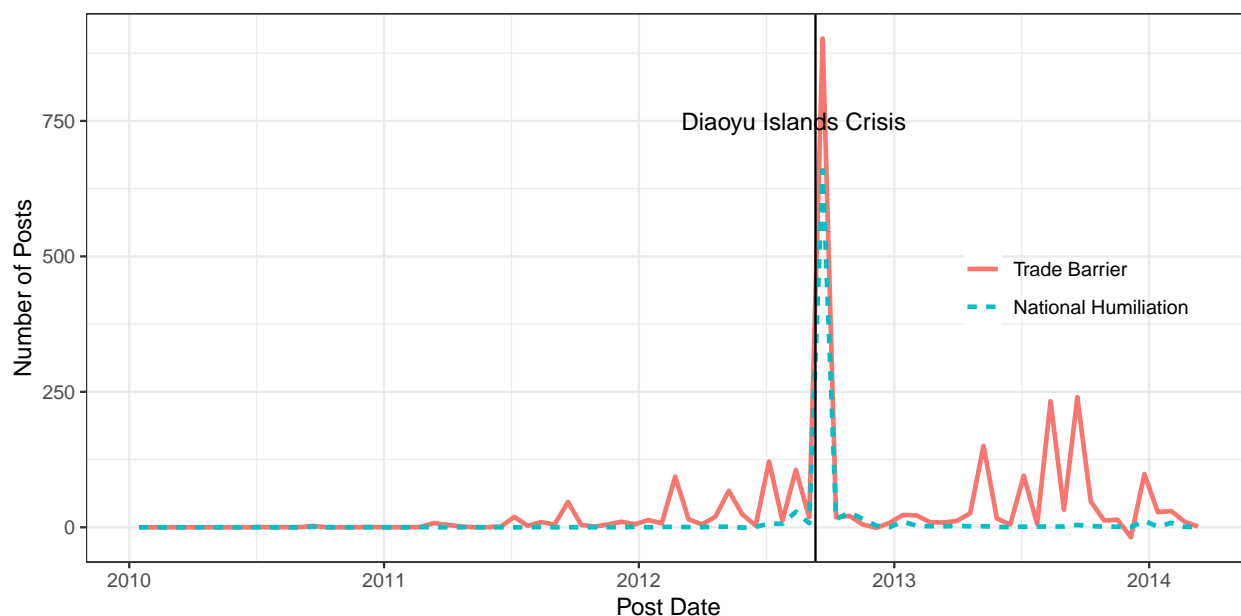


The release of the Japanese government's arrangements to purchase the islands set off nationalist protests in over 200 cities in China, the largest nationalist protests in recent memory ([Wallace and Weiss 2015, 404–5, 413](#)), so it seems likely this information had a large

effect on nationalist sentiment. It should affect animosity not only towards Japan, but also towards the United States, which has had a policy that the US-Japan Security Treaty includes these islands since 1972 (CRS 2021). Figure 2 shows posts containing the trade barrier and national humiliation variables overtime. Supporting the strong relationship between the purchase and nationalist sentiment, both variables have their largest spike immediately after the announcement.

Figure 2: Posts Over Time

Variables smoothed using locally estimated scatterplot smoothing (LOESS).



Of course, the overall Diaoyu Islands dispute between China and Japan, which has spanned decades, is endogenous to Chinese nationalism, so how can this indicator be exogenous to confounds that affect Chinese nationalist sentiment? Our key identification assumption is that the *timing* of the leak of Japan’s decision to purchase the islands is exogenous from nationalist dynamics within China. The decision to purchase the islands was triggered by Japan’s domestic politics as the nationalist former governor of Tokyo, Shintaro Ishihara, planned to purchase the islands on his own initiative. Fearing the consequences, the Japanese central government made its own arrangements to purchase the islands, which it planned to do after diplomatically preparing the ground with China by explaining that

this action was intended to prevent Ishihara’s purchase, which the Japanese government expected would be even more inflammatory. However, this plan was derailed and the Japanese government’s hand was forced when the news that Japan was going to purchase the islands leaked to the Japanese newspaper *Asahi Shimbun* (Vogel 2019, 391). The exogeneity of the timing of this event from online nationalist dynamics within China is plausible because Chinese citizens posting online would have no ability to influence the timing of the leak that came from the Japanese government to a Japanese newspaper.

Further, the Japanese government’s purchase of the islands should not affect phone choice through any means other than nationalist sentiment. The islands are uninhabited, so their status does not influence device production or consumers’ ability to purchase devices (CRS 2021). Further, international trade of electronic devices and components remained open during this period (the possible temporary halt of rare earths exports from China to Japan occurred in 2010 not 2012, so it is not within the window analyzed here (Klinger 2018, 138)). Moreover, the purchase of these islands does not reveal any new information about the quality of electronic devices that could affect consumer decisions. Because we only include a one month window before and after the purchase on September 11, 2012, there is less opportunity for events that occurred after this date, which could affect phone choice, to confound the instrument.

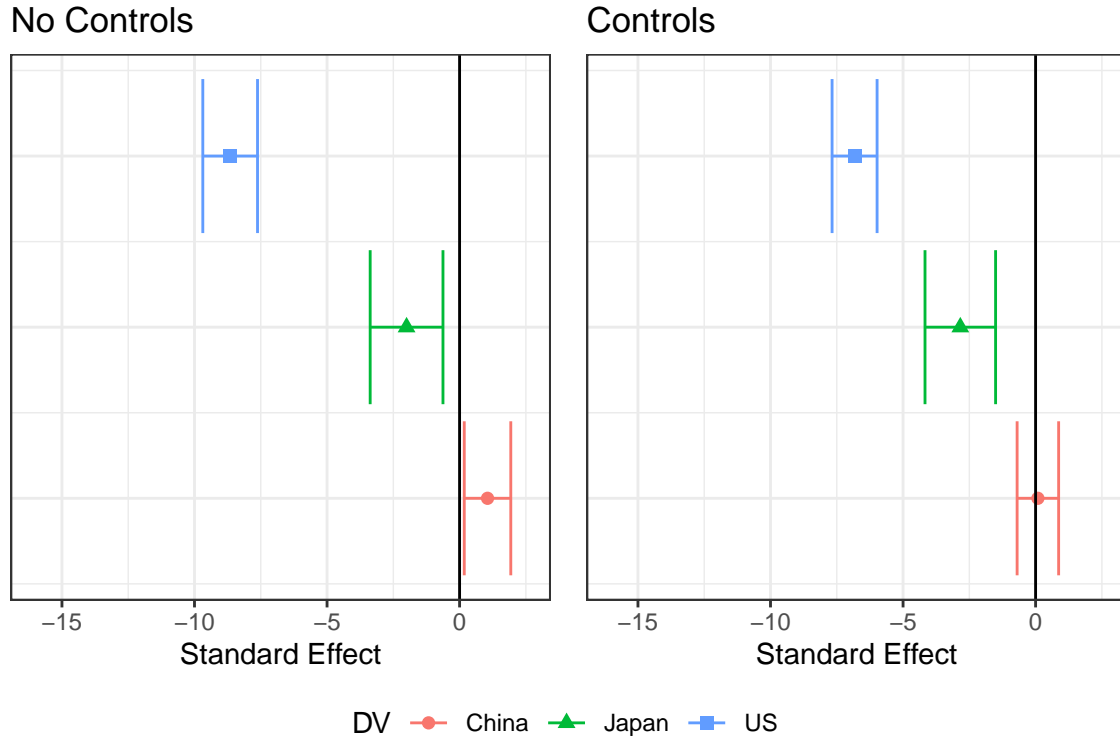
One limitation of this instrument is that it affects both operationalizations of nationalist sentiment: trade barrier and national humiliation. This means that the analysis cannot distinguish which of these two variables does the causal work. However, we conceptualize these variables as observable manifestations of the latent variable of economic nationalist sentiment within China, which is our true independent variable of interest. Including analysis of both is intended to ensure that our results do not depend on how this latent concept is measured rather than to make claims that particular kinds of nationalist sentiment are critical.

3 Results

Figure 3 shows the effect of trade barrier on phone choice. The animosity hypothesis is strongly supported for both American and Japanese brands, regardless of whether controls are included in the model. In all cases the effects are statically significant. The models with controls indicate trade barrier content in posts is associated with about a 100 percentage point (7σ) drop in the probability a user is using a US phone and an approximately 26 percentage point (3σ) decline in the probability a user is using a Japanese phone.

In contrast, the affinity hypothesis (H2) is not supported. While the model with no controls finds a statically significant effect in the hypothesized direction, once controls are added, the point estimate of the effect is approximately zero and the effect is no longer statistically significant.

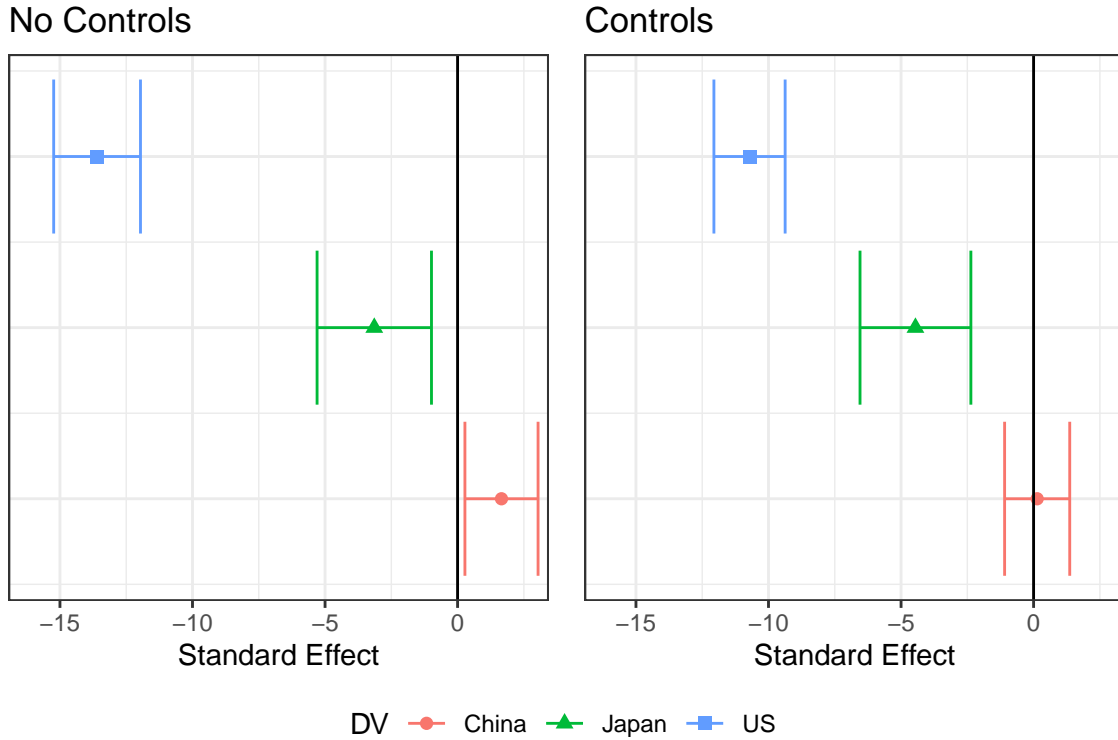
Figure 3: Instrument for Trade Barrier Results



$N = 45,215,642$ Weibo posts for the models without controls and $44,999,259$ for the models with controls. 95% confidence intervals shown. All models include user fixed effects and cluster standard errors on the user. The control variables include device price, the length of the post in characters, and income inequality.

Figure 4 shows the effect of national humiliation on phone choice. As with the trade barrier results, the national humiliation results provide strong evidence for the animosity hypothesis (H1) with both US and Japanese brand devices. For both, regardless of whether controls are included, national humiliation has a negative effect that is substantively and statically significant. The models with controls imply national humiliation is associated with an approximately a 100 percentage point (11σ) decrease in the probability of using a US device and about a 41 percentage point (4σ) decline in the probability of using a Japanese device. Further consistent with the trade barrier results, these models do not support H2 as the effect of national humiliation on Chinese brands becomes statistically insignificant with a point estimate of close to 0 once controls are added.

Figure 4: Instrument for National Humiliation Results



$N = 45,215,642$ Weibo posts for the models without controls and 44,999,259 for the models with controls. 95% confidence intervals shown. All models include user fixed effects and cluster standard errors on the user. The control variables include device price, the length of the post in characters, and income inequality.

Overall these results strongly support H1 but do not provide evidence of H2. This implies that when individuals experience nationalist sentiment they are likely to switch away from

US and Japanese brands that they have animosity towards but are not necessarily more likely to choose a Chinese brand. Instead, they may be substituting other foreign brands towards which they have less animosity.

3.1 Robustness Checks

In the Appendix, we conduct several additional tests to address potential concerns about our results. First, we follow Masterson (2024)’s strategy to check whether our results are driven by censorship in Appendix C. Next, we show that the results are generally consistent across different time windows around our September 11, 2012 Diaoyu Islands event in Appendix D. Finally, we address the concern that because of our large sample size, even substantively unimportant effects might return statistically significant results by showing that our results meet a conservative (strict) test of formal substantive significance in Appendix E (Hartman and Hidalgo 2018).

4 Conclusion

Our study provides strong evidence that nationalist sentiments are causally associated with greater willingness to pay costs, which supports the underlying assumption of a wide variety of theories about nationalism’s affect on outcomes, including on conflict, trade, and government legitimacy. Specifically, we find animosity towards foreign brands that are associated with countries viewed as having harmed the nation. This study provides several missing empirical links. First, it is, to our knowledge, the first study that combines a measure of economic nationalist sentiment on the individual level (avoiding the ecological fallacy) with a costly behavioral measure of an individual’s economic choices. Second, our instrumental variable approach allows us to be much more confident that we have recovered an accurate estimate of the causal effect of economic nationalist sentiment on individual behavior than existing observational studies, which rely on statistical controls of observable variables to

adjust for confounds. The importance of this is dramatized by our descriptive results that show that without such an identification strategy, we would have been unable to recover an effect of nationalist sentiment (see Appendix F).

More concretely, our results show that the frequent examples of individuals who profess to be nationalists yet consume brands associated with countries they express animosity towards should *not* dissuade us of the power of nationalism to shape behavior. In the Chinese context, a common example is the open secret that top Chinese leaders frequently send their children to elite private universities in the United States despite their “anti-American rhetoric” (Higgins and Fan 2012). This should not convince us that nationalism does not affect their behavior because we do not observe the counterfactual rate at which these leaders, holding unobserved confounds constant, would send their children to the United States absent these sentiments. Of course nationalism is not the sole determinate of behavior, but our results provide evidence that nationalist sentiments have a large impact on behavior that should not be underestimated as a result of confounds that obscure it in many contexts.

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