

When fiction is presented as real: The case of the burly boatmen¹

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From Adam Smith's pin factory and Rousseau's state of nature onward, parables—openly fictional or speculative stories constructed to dramatize a theoretical point—have been central to economics and other social sciences. Sometimes, though, a parable can escape its cage and be presented as a real event that happened in the wild, in which case what was originally intended as an explanation can be presented as empirical evidence.

Attributing fiction as fact is dangerous for two reasons. First, we can fool ourselves and others into thinking the evidence for a proposition is stronger than it actually is. Second, stories are not elaborated at random; when they are altered in the retelling it is natural for authors to modify their details in ways that fit the theories they want to prove. This is fine when a parable is presented as such; the problem arises when the story's original foundation and later trajectory are obscured, leading authors and readers to think of it as empirical confirmation.

This is a story of how a particular story spread and mutated across the economics literature over several decades, becoming more fictional at each step while being presented more and more as factual. It should be a warning to authors and readers of research papers to beware of stories that fit a theory all too well and to check through the trail of references before retelling—or, worse, elaborating upon—stories that are presented as real.

Steven Cheung (2018) wrote:

In 1970, Toronto's John McManus was my guest in Seattle. I chatted to him about what happened when I was a refugee in wartime Guangxi. The journey from Liuzhou to Guiping was by river, and there were men on the banks whose job was to drag the boat with ropes. There was also an overseer armed with a whip. According to my mother, the whipper was hired to do just that by the boatmen!

My tale went the rounds, and it was seized by a number of neo-institutional economists. I tried to dissuade McManus, tell him not to publish his piece based on my Guangxi story, but he went ahead nonetheless. . . . As a result of all this, the Guangxi boatmen and their hired whippers gained posthumous fame. However, this could be a story invented by my mother – the smartest person I have ever known – to entertain a boy of seven!

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Oddly enough, in a 1983 article Cheung himself reported the story as fact:

My own favorite example is riverboat pulling in China before the Communist regime, when a large group of workers marched along the shore towing a good-sized wooden boat. The unique interest of this example is that the collaborators actually agreed to the hiring of a monitor to whip them.

In the meantime, the story had been elaborated. From McManus (1975):

On one such passage an American lady, horrified at the sight of the overseer whipping the men as they strained at their harness, demanded that something be done about the brutality. She was quickly informed by the Captain that nothing could be done: “Those men own the right to draw boats over this stretch of water and they have hired the overseer and given him his duties.”

This new twist served the function, familiar in economics writing, of portraying economics as a science of uncomfortable truths. McManus also incorrectly places the trip on the Yangtze River, a location that is hundreds of miles north of Guangxi. This reminds me of how the organizational theorist Karl Weick, when retelling a story about a map in the Alps without attribution, described it as “an incident that happened during military maneuvers in Switzerland,” even though the original story said nothing about Switzerland and almost certainly would have occurred in a different part of the Alps (see Gelman and Basbøll, 2013). Weick, typical American that he was, read “Alps” and just assumed “Switzerland.”

The mislocation of the river is the least important aspect of the boatmen story; I mention it only because it reveals the willingness of authors to just make things up.

I learned about the episode from the blog post of Anonymous (2020), who pointed to several other retellings of the story in the decades since, and wrote:

Of course, there exists the possibility that at some time in history, some workers some place did on at least one occasion hire a monitor to whip them. The problem is that we have zero evidence that this ever happened, other than a story a mother told to her seven-year-old son, who then repeats it decades later. A few decades further, the academic urban legend becomes an established fact that can be cited as evidence for one’s preferred theories and worldviews (and ignored otherwise) . . . it’s intellectually dishonest to cite a story as evidence when you know it might be false.

With Clement and McCormick (1989), the story has become the “famous Chinese boatpullers fable,” where “the monitor uses his vision, intuition, and experience to determine shirking, counseling the loafers with his whip.”

I find that last bit to be particularly creepy. I understand that the word “counseling” is being used ironically, in the same spirit of dry humor by which cynical doctors refer to gunshot wounds as

“acute lead poisoning”—but I am put off by this sort of joking about cruelty (even if, in the case at hand, the event may never have occurred).

I also find it weird how nearly every telling of this story, except for Cheung’s, uses the word “coolies.” Who even uses that word nowadays? (A quick google ngram search reveals use of the word to have peaked in the first two decades of the twentieth century, when it was as popular as a notorious slur used to describe African-Americans.) Perhaps the use of an archaic ethnic slur provided some verisimilitude?

Here is how the story was told by Kaur, Kremer, and Mullainathan (2015):

. . . in a story by Steven Cheung (1983, 8): “On a boat trip up China’s Yangtze River in the 19th Century, a titled English woman complained to her host of the cruelty to the oarsmen. One burly coolie stood over the rowers with a whip, making sure there were no laggards. Her host explained that the boat was jointly owned by the oarsmen, and that they hired the man responsible for flogging.”

Interesting. Now it happened “in the 19th century.” Perhaps setting it so far in the past makes the story more plausible? Also added is the detail about the “titled English woman”—maybe that’s supposed to make us dislike her? Recall that in the original story she was not a titled English woman in the 19th century, she was a Chinese war refugee in the 20th century. Changing her from a Chinese refugee to a “titled English woman” fits with a common academic-social-scientist ploy to portray skeptics as out-of-touch elitists. You might naively think that laborers getting whipped is a bad thing, but that’s just you being a “titled English woman.” In the earlier mistelling by McManus (1975), she was described as “an American lady”—I guess “a titled English woman” made a better story. Why not just go all the way and say it was Queen Victoria? Also, the quote was actually not from Cheung (1983) but from Jensen et al. (1998), a collection of exam questions.

In summary, the parts of the story that are entirely made up are: (1) the Yangtze river, (2) the 19th Century, (3) the English woman, (4) the woman being “titled,” (5) the woman complaining, (6) the overseer being “burly,” (7) the boat being rowed rather than pulled, (8) the existence of a “host,” (9) the ownership of the boat, and (10) the sourcing of the story. Many sources testify to a long history of boat pullers on Chinese rivers, but there’s no good evidence for the remaining part of the story, that there was ever a man with a whip in the first place.

To their credit, Kaur, Kremer, and Mullainathan (2022) unambiguously corrected their error. Some loose ends remain, though. It’s still not clear how the authors of this article ended up taking an over-the-top description from an obscure collection of practice exam questions. I’m not saying there was anything nefarious going on here, just that they were in retrospect a bit too comfortable with a ridiculous story that confirmed their preconceptions—something that all of us are familiar with when we forward some too-good-to-be-true story on social media.

In their correction note, the authors summarize:

The quote is in no way central to the core point of the paper, or even for the discussion in section VI of the paper. . . . Consequently, this incorrect quote can be omitted from the paper without any impact on the substance of the paper.

Fair enough. But if the original story was a good illustration of their general point, then it should make a difference that the original story was fabricated (or, to put it more charitably, was elaborated to a ridiculous degree), no? What does it mean to mistakenly use a false story as evidence? At the very least, it's informative that the authors and others seemed to have believed the story was true. The whole thing's still eating at me. It would be as if I wrote a political science paper and used a story from Game of Thrones to illustrate a point—but presenting it as if Westeros was a real place. Using a made-up story as explanation is fine; just clearly label it as such, and maybe reflect on what it is about the story that's so appealing to you.

Let's accept that the substance of the paper is unaffected by the whipped-boatmen story. It remains interesting that many economists have presented the story as true, even though it's actually the result of a series of wild embellishments from an initially speculative source. To put it another way, if the whipped-boatmen story is so consistent with the substantive message of the paper that it was included *as an example to demonstrate the theory* (as the authors put it in their rejoinder, “The inaccurate quote was included simply as a way to illustrate the idea that joint production might necessitate the need for monitoring”), and then it turns out the story is false, then maybe this should cast some doubt on said theory? Maybe joint production might not necessitate the need for monitoring as often as they think? At least not in the sense of “counseling the loafers with his whip”?

Economist Peter Dorman (2022) puts it this way:

The attractiveness of the “coolie” story is that it addresses directly a major potential source of embarrassment—that a large portion of the workforce in the US and many other countries is visibly oppressed at work. People are issued orders, punished if they are seen to be less than completely obedient, and made to accept working conditions that harm and demean them. This becomes newsworthy when a union organizing drive occurs or if it's in the context of a major public health crisis (like covid and the meatpackers), but it's there to be seen whenever you want to look. The “coolie” story tells us not to worry, that workers *want* it to be like this.

Dorman's claim is not that the tellers of this story are intending to support any particular policies regarding business or labor unions (but see Munger, 2019), just that the story, especially in its more baroque elaborations, reinforces a particular ideology. One could also point in the other direction to parables that reinforce ideologies that are congenial to interventionist policies.

Indeed, there is a long history of concern regarding worker motivation. Drury (1915) tells this story about Frederick Taylor, the father of modern scientific management:

During his experience as a workman, Taylor had been constantly impressed by the failure of his neighbors to produce more than about one-third of a good day's work. Wages in the Midvale shop were on a piece-work basis, and the men were afraid to let the management guess how large a product they could really turn out because it might mean a cut. This tendency on the part of the workmen had resulted in a war between Taylor, the gang-boss, who was trying to induce the men to work faster, and the workmen under him who were determined that by fair means or foul they would avoid working faster.

As with many innovations of that era, scientific management had a progressive tinge: Drury describes it as an “effort to arouse the initiative of the workman and provide a means by which it becomes to his advantage to do his best” and coupled it with “regulation by the state of the conditions of employment, and of other movements designed to round out the lives of workmen, to better their surroundings at work, at home, and during recreation.” To his credit, Drury, unlike the later economists, was able to tell his story without adding ridiculous but ideologically-friendly embellishments.

Careful sourcing by authors and vetting by reviewers should make it more difficult to tell—and draw conclusions from—made-up stories as if they were true. And when such errors are discovered, we should avoid being too quick to declare that they never mattered.

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