

“Remembering the Way it Was”: Development and Validation of the Historical Nostalgia Scale

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Abstract

Nostalgic appeals have been identified as a highly effective advertising tool, influencing consumer's emotional, cognitive, attitudinal, and purchase behaviours, amongst others. However, the specific 'type' of nostalgic appeal being elicited is often overlooked. Previous empirical studies explore nostalgia in a 'unified' form, although academics have made a distinction between two forms, namely personal and historical nostalgia. As such, current scales to measure nostalgia have also taken this unified approach, and thus cannot distinguish between the two forms. This study aims to fulfil this gap by developing a scale specifically tailored to measure historical nostalgia as its own reaction independent of personal nostalgia. Scale generation, purification, validation and confirmation are achieved through four studies.

Keywords: historical nostalgia, scale development, emotions, consumer behaviour

Background and Problem Development

Nostalgia is described as an individual's 'longing for the past, and yearning for yesterday' (Holbrook, 1993). It has been implicated in a variety of behavioural research contexts important to marketing, including self-concept, cognitive reactions, brand loyalty, brand meaning, the human senses, attitude and consumption preferences, literary criticism, collective memory, and emotions (Muehling and Sprott, 2004). Academics have begun to refine nostalgia by proposing that nostalgic reactions may be generated from either a personally remembered past (personal nostalgia, 'the way *I* was') or from a time in history not personally experienced, even from before one was born (historical / communal nostalgia, 'the way *it* was') (e.g. Stern, 1992; Havlena and Holak, 1991). Although these definitions of nostalgia describe the reaction as that of cognitive event, nostalgia is commonly termed as an emotional reaction (Holak and Havlena, 1998). Thus the term 'emotion' was added to the working definitions for clarity and are worded as such: **Personal Nostalgia:** thoughts and emotions generated from a personally remembered or experienced past ('the way *I* was'). **Historical Nostalgia:** thoughts and emotions generated from a time in history that the respondent did not experience directly, even a time before they were born ('the way *it* was').

Previous studies show nostalgia can significantly effect emotions, cognitions, attitude towards and adverts and brand, and purchase intentions (Muehling and Sprott, 2004; Holak and Havlena, 1998). This is in addition to the many other consumer behaviours that nostalgia has been implicated in, as mentioned previously. The catalyst issue that indicates a clear distinction between the forms is that personal nostalgic makes use of the respondent's autobiographical memories (Brewer, 1986; Neisser, 1988), also called personal (Brewer and Pani, 1983) or episodic (Tulving, 1972, 1984) memory, while historical nostalgia by definition does not do so. Instead it calls on collective memory (Halbwachs, 1950) and employs a more 'fantasy' approach (Stern, 1992). This is of importance as salient thoughts are often self-referencing and thus may influence mental-processing activity when attitudes are

formed and retrieved (e.g. Greenwald, 1968). Furthermore, emotionally arousing events are more likely to be recalled later than more neutral events, and nostalgia is shown to result in complex, often personal emotions (Canli et al. 2000; Holak and Havlena, 1998). As such, personal nostalgia is expected to then lead to more salient and heightened emotions and cognition than historical nostalgia. This is likely to have follow-on effects to attitudes and purchase intentions, as can be seen in models such as the Dual Mediation Hypothesis (MacKenzie, Lutz and Belch, 1986). As nostalgia has been implicated in these and other consumer behaviour reactions, and it is clear that reactions may differ depending on the form of nostalgic being elicited, it is of vital importance for marketing practitioners to know what type of nostalgic appeals to utilize. Additionally, they should know what form of nostalgia (if any) is being experienced by consumers. Likewise, researchers need to make this distinction between the two forms in order to provide more robust information about nostalgic appeals, consumer behaviour reactions, and practical policies and strategies. To achieve this, specific scales are needed to measure each nostalgic form independently. This study develops the scale needed to test historical nostalgia.

Methods and Results

Four studies were undertaken to generate, validate and confirm the historical nostalgic scale. It should be noted that whether or not a reaction to a stimulus results in historical or personal nostalgia is often dependent on the person's age in comparison to the stimulus. As such, a delimitation of those aged between 17 and 25 was enforced for each study. Likewise, the effect of nostalgia may change depending on the respondent's 'life station' (Davis, 1979). Limiting the age in these studies also ensured a more homogenous sample. Furthermore, there is current evidence of youth being targeted by marketers that employ elements of historical and personal nostalgic appeals to alter their consumer's behaviour. In fact, some studies have shown that older adults are less nostalgic than younger adults (college aged) (Batcho 1995).

Study one

Purpose: The first step in development of the scale was to generate items designed to 'capture the conceptual and logical true variance presented in the construct' as per their definition (Eastman, Goldsmith and Flynn, 1999). The constructs in this case were historical and personal nostalgia. It has been suggested that the theory surrounding the concepts being explored should first be consulted to aid clarity (DeVellis, 2003). The definitions and theories supporting each form of nostalgia (autobiographical memories and the like) are discussed previously. As per Li, Edwards and Lee (2002) three methods were used to generate a set of potential scale items: literature reviews (Churchill, 1979), thesaurus searches (Wells, Leavitt and McConville, 1971), and experience surveys (Chen and Wells, 1999; Churchill, 1979). From these procedures an initial pool of 72 items was developed. The use of experience surveys (conducted with both academics and practitioners) would also help ensure the face validity of what would be the future scales for measuring and testing nostalgia.

Method and analysis: Two broadcast style adverts for the brand "Kodak" were produced, eliciting either a personal or historical nostalgic appeal. These adverts were pre-tested using a thought collection and coding study to ensure the desired reaction to each advert was being met (as per Wright, 1973; Mackenzie, Lutz and Belch, 1986; Gurhan-Canli and Maheswaran, 1998; Pascal, Sprott and Muehling, 2002; Muehling and Sprott, 2004). Survey instruments with the initial 72 items and elicitation of demographic information were designed and

administered. Valid respondents received totalled 117 for the personal condition and 118 for the historical condition. Exploratory factor analysis (EFA) has often been cited as a first step in scale development and item removal and was thus undertaken (DeVellis, 1991, Spector, 1992, Sweeney, Hausknecht and Soutar, 2000).

Results: EFA revealed three factors, two of which were clearly related to personal and historical nostalgia. The EFA process included removing items indicated as unusable in the EFA, in addition to using Cronbach's alpha and removing items with squared multiple correlations of less than 0.30 and corrected item-to-total correlations of less than 0.50 (DeVellis, 1991). An analysis of the items through their mean scores showed no extreme means either way (between 4.03 and 5.03 on a seven point scale) (DeVellis, 2003). The scale length was also optimised by removing the weaker items in favour of almost identical stronger items. Finally nine items were left relating to personal nostalgia ($\alpha = .946$) and 11 items relating to historical nostalgia ($\alpha = .912$) (KMO and Bartlett's test = .918, Approx. Chi-Square = 3035.505, df. = 190, Sig. = .000).

Study Two

Purpose: The aim of this study was to examine the unidimensionality of the scale developed in Study One and, if necessary, further purify the scale items. The content validity of the scale was examined by comparing the remaining items with the working definition of the construct of historical nostalgia.

Method and analysis: The Kodak broadcast advert was utilised with a new survey instrument containing the 11 items for historical nostalgia. Valid respondents totalled 237. Confirmatory factor analysis (CFA) was used to test for unidimensionality (Pedhazur and Schmelkin 1991) which is considered by some as a superior technique over EFA for this task (O'Leary-Kelly and Vokurka 1998). Additionally, CFA has been shown as a means of scale reduction by showing what items may be trimmed from the scale, in addition to confirming the scale's final form (Netemeyer, Bearden and Sharma 2003; Floyd and Widaman 1995).

Results: CFA further refined the scale resulting in five items for historical nostalgia reaching acceptable results (Hu and Bentler 1999) (Chi-square = 4.498, df. = 5, Probability level = .480, GFI = .993, AGFI = .978, RMSEA = .000, $\alpha = .74$). On face value the scale also still encompassed the character of the definition (content validity). The CFA is presented in Figure 1 which also reveals the five items that emerged through the procedure.

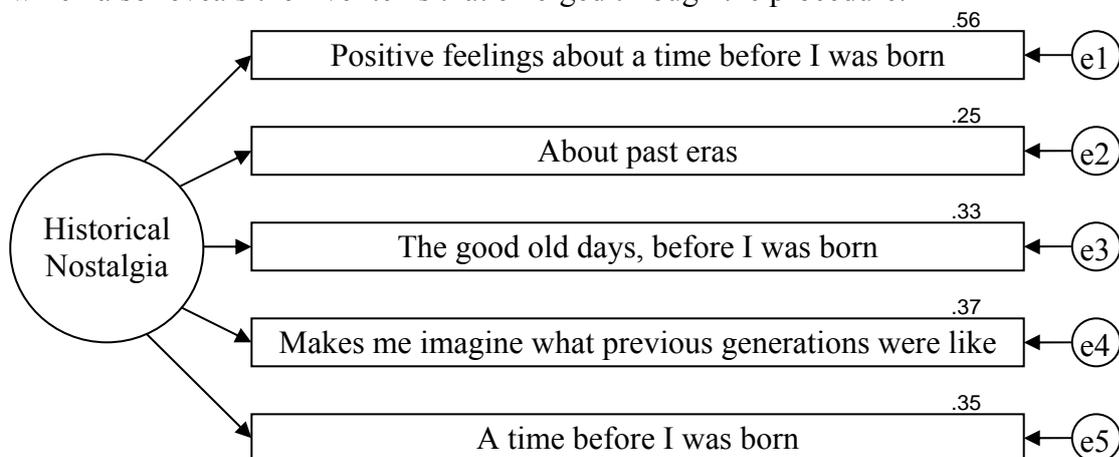


Figure 1: Confirmatory Factor Analysis for Historical Nostalgia Scale

Study three

Purpose: This third study was undertaken to test construct validity, specifically convergent, discriminant, and criterion (predictive) validity by adopting the methods as recommended by Churchill (1979), Campbell and Fiske (1959), and Oh (2005).

Method and analysis: A new survey instrument was designed containing the scale items in addition to an established scale to measure attitude towards the advert ($\alpha \geq .90$) (Pascal, Spratt and Muehling, 2002; Muehling and Spratt, 2004). This would be of use in establishing predictive validity through median split and T-tests. Previous studies have shown that an increase in nostalgic reactions positively affects attitudes (Muehling and Spratt, 2004). Thus those people experiencing a higher level of nostalgia (in this case measured by the Historical scale) should experience a more positive attitude towards the advert. Three previously established scales, namely 'evoked nostalgia' (Pascal, Spratt and Muehling, 2002), 'nostalgic proneness' scale (Holbrook, 1993) and the 'experience' scale (Taylor and Konrad, 1980), were included in the instrument to test for convergent and discriminant validity via the use of a Multitrait-multimethod matrix (MTMM) (Campbell and Fiske, 1959; Churchill, 1979; Oh, 2005). The 'Experience' and 'Nostalgic Proneness' scales have been used together in the past to explore consumers attitude towards the past (Schindler and Holbrook 2003) and should show discriminant validity. The 'evoked nostalgia' scale which explores nostalgia in a unified form is expected to be closely correlated with historical nostalgia, but yet different and thus is used to test for convergent validity.

Results: T-tests confirmed predictive validity by showing a significantly more positive attitude towards the advert ($P < 0.05$, $df. = 123$) with those experiencing a higher level of nostalgia, as tested by the developed scale. As shown in Table 1, the basic principles of a valid MTMM are met, as per the following 'rules', which have been listed verbatim of Trochim (2006) but with the following discussion / analysis after each rule in original form:

Table 1: Multitrait-multimethod Matrix Scale

		Likert style		Bi-polar	
		Historical nostalgia (Historical)	Attitude towards past (Experience)	Historical nostalgia (Evoked Nostalgia)	Attitude towards past (Nostalgic Proneness)
Likert style	Historical nostalgia (Historical)	0.662 ^a			
	Attitude towards past (Experience)	.318 ^b	0.598 ^a		
Bi-polar	Historical nostalgia (Evoked Nostalgia)	.440 ^c	.154 ^d	0.844 ^a	
	Attitude towards past (Nostalgic Proneness)	.115 ^d	.398 ^c	.219 ^b	0.518 ^a

^aReliability diagonal ^bHeterotrait-monomethod block (correlations of the different constructs measured by the same methods). ^cMonotrait-hetromethod block (validity diagonals) (correlations of the same constructs measured by different methods). ^dHeterotrait-hetromethod block (correlations of the different constructs measured by different methods).

1. 'Coefficients in the reliability diagonal should consistently be the highest in the matrix': This is explored as a trait should be more highly correlated with itself than any other scale. This is uniformly true in this MTMM (indicated by ^a).
2. 'Coefficients in the validity diagonals should be significantly different from zero and high enough to warrant further investigation': This is in order to test for convergent validity. The validity diagonals are those that belong to the Monotrait-heteromethod block (in this matrix indicated by ^c) and in this case all of the correlations meet this criterion at the .01 level using bivariate correlation tests.
3. 'A validity coefficient should be higher than values lying in its column and row in the same heteromethod block': True in this matrix, as the first validity coefficient (.44) is higher than .32 and .12, with the remaining validity coefficient (.40) sharing this pattern.
4. 'Validity coefficient should be higher than all coefficients in the heterotrait-monomethod triangles': This explains that correlations between similar traits measured by different methods should be stronger than correlations between different traits with the same method of measurement. We can see that the trait coefficients (.44 and .40) are higher than the correlations that appear between traits that share only a method (.32, .22). This should signify the absence of any methods factor.
5. 'The same *pattern* of trait interrelationship should be seen in all triangles'. These patterns between traits also occur in our MTMM. This can be noted by the correlations of the Heterotrait-heteromethod measures (^d) being uniformly lowest in the matrix. This is as would be as expected, as the scales share neither methods nor traits. Likewise, the Heterotrait-monomethod scores (^b) are higher than these due to the shared method, but as discussed in rule three, not higher than those which share a trait (^c).

Study four

Purpose: The purpose of this study was to increase the generalisability of the scales by performing a CFA on the five prior validated items using a variation in advertising media channel (print as opposed to broadcast) and brand choice (Nikon as opposed to Kodak). It also facilitated a concurrent validity test.

Method and analysis: After the new print advert was pre-tested with a focus group, a new sample was collected resulting in 213 useable surveys. In addition to the five items for testing historical nostalgia, six items developed in another study for testing personal nostalgia were included in the survey instrument. To further prove that these two forms of nostalgia are indeed distinctive, a T-test was used to compare the mean of the personal items to the mean of the historical items under both personal and historical nostalgic advertising appeal conditions. The CFA was again completed using AMOS 6.

Results: The CFA showed the suitability of the historical scale under the differing conditions with acceptable results (Hu and Bentler 1999) (Chi-square = 5.977, df. = 5, Probability level = .308, GFI = .989, AGFI = .966, RMSEA = .030, α = .70). Regarding concurrent validity, under the historical condition the T-test showed a significantly greater level of historical nostalgia being displayed through the scale ($p < .001$) and likewise, under the personal nostalgic condition a significantly smaller amount was displayed ($p < .001$).

Conclusion

This paper has given an overview of the process undertaken in developing the historical nostalgic scale through four independent studies. The scale items were first generated and purified through EFA and CFA (Study 1, 2). The scale has shown content validity and unidimensionality (Study 2), convergent, discriminant, and predictive (criterion) validity (Study 3), concurrent (criterion) validity (Study 4) and generalisability across channels and brands (Study 4). Although additional studies will assist in solidifying the appropriateness of the scale across varying conditions, this study provides an important contribution to marketing literature by filling an important gap in instrumentation as no previous scales were available that make the distinction between the two types of nostalgia. The scale can also be used to further test the many avenues related to nostalgia that have not been previously attempted when taking into account the varying distinct forms. These future studies are required for a more robust knowledge base on the construct.

Its managerial use as a manipulation check to ensure the advertisements produced are eliciting the correct and intended form of nostalgia will assist in increased accuracy of expected results on consumer behaviour reactions related to nostalgia. This is coupled with the continued use of nostalgia as a common advertising appeal in the market place and the wide variety of implications that nostalgic effects can have on consumer behaviour.

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