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Review article

What can empirical research tell us about how to develop students' historical empathy? A scoping review

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Abstract

The aim of this scoping review is to systematically select, analyse and synthesise recent empirical research to better understand the factors that influence students' learning of historical empathy, as well as the implications for educators. The review also maps conceptualisations of historical empathy, finding that it is predominantly understood as both an affective and a cognitive concept. Notably, there appears to be a slight shift in conceptualisations over time, from a notion of 'stepping into other people's shoes' to a focus on 'understanding' perspectives of people in the past. Two particularly influential pedagogical frameworks are identified: one by Keith C. Barton and Linda S. Levstik, and the other by Jason L. Endacott and Sarah Brooks. Key factors influencing students' learning of historical empathy include the ability to contextualise and see multiple perspectives, student engagement and emotions, presentism and moral judgment, and student identification and identity. The synthesis of findings suggests several implications for educators aiming to foster historical empathy. These include the importance of introducing multiple historical perspectives, providing sufficient substantive knowledge, scaffolding contextualisation, harnessing affective dimensions,

encouraging moral responses while challenging presentist judgment, and being aware of the influence of contemporary contexts, namely societal narratives and values, students' identities and the historical topic at hand.

Keywords historical empathy; scoping review; empirical research; student; primary education; secondary education; history education

Introduction

The aim of this scoping review is to analyse relevant recent research to understand factors that influence students' learning for historical empathy, and implications these factors may have for educators.

The concept of historical empathy was first introduced in the English Schools Council History 13–16 Project in the 1970s as part of a new approach to history education. This approach aimed to move away from mere memorisation of facts and national narratives, focusing instead on both disciplinary competences and democratic citizenship (Endacott and Brooks, 2018). Broadly speaking, historical empathy can be described as taking, understanding and/or explaining perspectives of people in the past within their historical contexts. However, since its inception, historical empathy has remained a contested concept (Karn, 2023).

There have been several discussions on historical empathy, including how it should be conceptualised, its role in history education classrooms and the best ways to promote and measure it (Endacott and Brooks, 2018). Historical empathy has faced criticism for embracing identification, sympathy and pure imagination (Perikleous, 2014), for allowing imagination to override the rigorous work of contextualisation, and for prioritising causes over consequences and justice (Endacott and Brooks, 2018). Additionally, it has been criticised for aiming at the impossible, namely completely taking a past actor's perspective (Retz, 2015). Another discussion centres on whether historical empathy introduces anything substantially new to history education or if it is merely a renaming of already exciting goals. An argument for the latter is that goals of historical empathy were implicitly present in curricular documents in the USA both in the early 1900s (Perrotta and Bohan, 2018) and in the period 1950–80 (Perrotta and Bohan, 2020). Nevertheless, over the years, the concept has become well established in both theory and practice in history education.

In 2009, Sarah Brooks published a literature review on historical empathy, discussing conceptualisations and empirical findings concerning student learning. She found that studies failed 'to acknowledge and analyse the competing conceptualizations', and that research interventions did not necessarily build on earlier research (Brooks, 2009: 230). Brooks (2009) also found that students had a capacity for historical empathy and achieved this through different practices: working with historical evidence to write historical explanations, reflective essays and first- and third-person writing tasks; as well as through Socratic seminars and debates. However, students' presentism and deficit explanations of the past were fundamental obstacles to achieving historical empathy (Brooks, 2009). Endacott and Brooks (2018: 214) found that 'background historical information', 'primary source work' and different types of questions are important for developing historical empathy. Several instructional activities have been used, all with their 'affordances and constraints', including discussion and debate, writing assignments and reflection (Endacott and Brooks, 2018: 215).

Over the years, the body of empirical research on historical empathy and student learning has grown substantially. Most of this research is qualitative, making it challenging for practitioners to navigate the myriad of complex and contextualised findings (Thomas and Harden, 2008). Therefore, there is a need for a broad mapping of central findings relevant to educational practices. This scoping review contributes to the body of knowledge by systematically selecting, analysing, summarising and disseminating empirical research findings (Arksey and O'Malley, 2005: 21) on historical empathy in educational settings published since 2009. The research questions are:

RQ1. In the included studies, what factors are particularly influential on students' learning processes towards historical empathy?

RQ2. What are possible implications of these factors for educators who seek to enhance historical empathy?

These research questions aim to synthesise insights that can be derived from empirical research. Consequently, this study does not include analyses of curricula or theoretical studies, as these provide a different type of insight into our understanding of historical empathy. In the following, I first present and discuss methodological considerations. Then, I outline different conceptualisations of historical empathy in the included studies to provide a foundation and context for the subsequent analysis. In the main body of the article, I analyse and highlight important factors for learning, and in the final section I synthesise the findings and discuss the implications for educators.

Method

The search process has been iterative, beginning with initial searches conducted for my PhD research (Harnes, 2022), followed by new searches carried out in January 2024. I searched for empirical studies from 2009 onwards that investigated student perspectives and used historical empathy as a main concept. For the purposes of this article, only studies that use the concept of *historical empathy* have been included and analysed. Still, it must be noted that there are overlaps between historical empathy and other concepts in history education, such as *contextualisation* (see, for instance, Huijgen et al., 2018) and *multiperspectivity* (see, for instance, Wansink et al., 2018).

The searches were conducted in English, Norwegian, Swedish and Danish, across multiple databases accessed via NLA University College: Academic Search Premier (EBSCO), Eric (EBSCO), ISI Web of Science, DOAJ, Oria (the search engine for Norwegian academic libraries) and Idunn. Additionally, the archives of some central history education research journals were hand searched, although these searches did not yield additional articles: *International Journal of Historical Learning Teaching and Research/History Education Research Journal*; *Acta Didactica Norden*; *Nordidactica*; *The Journal of Social Studies Research*; *Historical Encounters*; *Theory and Research in Social Education*; *Journal of Curriculum Studies*.

Upon completion of all searches, 41 articles were included (see Table 1). The included studies are peer-reviewed journal articles in history education or social studies, in primary and secondary education, and in various educational settings, such as classrooms, museums and historic sites.

Scoping reviews aim to systematically summarise a wide array of studies to provide a comprehensive overview of existing knowledge. To ensure breadth, quality and manageability, only peer-reviewed articles have been included, while book chapters and monographs have been excluded. Additionally, research contributions in other languages have been excluded due to the author's lack of proficiency in these languages.

The included studies vary in geographical context, with most conducted in the USA (12 studies), followed by the Netherlands (6 studies) and Sweden (4 studies). The studies used a variety of qualitative approaches, and they vary in the number and age of participants, historical themes and research topics (see Table 1 for information about each study). The age of students in primary and secondary education differs from one country to another. In the included articles, students are aged between 7 and 19 years, with one exception (Berti et al., 2009), which includes students up to 25 years old.

Thus, the process of synthesis and analysis has been complex and iterative, and, as in all qualitative research, interpretative. Other research questions would shed a different light on the included studies. To gain an initial overview, a short and systematic summary of each of the included studies was made, as recommended by Krumsvik and Røkenes (2016), and the categories should include the following options:

- author(s), year, title
- country
- conceptualisation
- research question(s)
- historical topic
- educational settings
- method(s)
- age of participants
- findings and implications.

Then, conceptualisations were mapped for each article: overall definitions, cognitive and/or affective dimensions, the role of primary sources, 'taking' or 'understanding' historical perspectives, philosophical underpinnings and pedagogical frameworks or models. Comparisons were made between them, and development tracked over time.

The summaries in the category 'findings and implications' were analysed abductively, constantly alternating between summary, article, codes and theory (Timmermans and Tavory, 2012). Deductive codes were based on previous research on historical empathy and included the following: *contextualisation*, *feelings and affective connection*, *multiple perspectives*, *moral dimension*, *sources and inquiry*, *past and present*. Inductive codes were added during the process and comprised: *substantive knowledge*, *student identity*, *imagination*, *pitfalls*.

There are some limitations to this analysis. First, since the aim is to look for patterns across a disparate body of research, a full analysis of each study is not presented, and some nuance is lost. For instance, findings that do not relate to historical empathy are not included, which risks de-contextualising the included findings. Nevertheless, the analysis brings out patterns across the studies which provide valuable insights into answering the research question in this review. Second, a scoping review aims at broadly mapping a research area and allows for the inclusion of studies which vary in scope and quality, without a thorough appraisal of 'the quality of evidence' of each included study (Arksey and O'Malley, 2005). Thus, rigorous, large projects of high quality are juxtaposed with small case studies to identify overall patterns and trends. Still, the reader will gain an impression of the scope and methodology of the included studies, as seen in Table 1.

Table 1. Overview of included research, chronological order

	Country	Method	*N*	Age	Historical theme	Research topic
Berti et al. (2009)	Italy	Quasi-experimental intervention	*N* = 150	8–25	The medieval practice of ordeal	How students construe the concept of historical empathy
Colby (2010)	USA	Intervention, case study	*N* = 4	12–13	The Alamo invasion	How students think historically and empathetically in historical inquiry
Endacott (2010)	USA	Descriptive, case study	*N* = 20	13–14	Historical figures in difficult situations	Students' affective engagement in a learning process in history instruction
Seng and Wei (2010)	Singapore	Intervention, case study	*N* = 5	13–14	Housing in Singapore, 1950–60s	The roles of teacher and student in nurturing imagination and empathy
Brooks (2011)	USA	Descriptive, case study	*N* = 4	14–18	European history	How students display the subjective and objective components of historical empathy
D'Adamo and Fallace (2011)	USA	Action research	*N* = 22	9–10	Virginian history, the American Civil War	Students' development of historical empathy/historical perspective-taking skills
Perikleous (2011)	Cyprus	Text study, student tasks	*N* = 32	9–12	History of childhood	Students' ideas of historical empathy
Metzger (2012)	USA	Descriptive, case study	*N* = 26	15–16	The Holocaust	The use of a dramatic film about an emotionally difficult topic with historical empathy as learning goal
Davison (2014)	New Zealand	Intervention, comparative case study	*N* = 45	14–15	The 1915 Gallipoli campaign	Students' interpretation of historical empathy

Endacott (2014)	USA	Descriptive, case study	*N* = 6	16–17	Harry Truman's decision to deploy atomic bombs	How students engage in the process of historical empathy to shape historical understanding and contextual knowledge
Nygren et al. (2014)	Sweden	Intervention, case study	*N* = 110	16–19	Children born out of wedlock	Possibilities and challenges when students use a digital database to learn historical thinking and historical empathy
Virja and Kouki (2014)	Finland	Text analysis, student essays	*N* = 96	16–19	Finnish child transportation to Sweden during the Second World War	Students' expression of historical empathy in essays
de Leur et al. (2015)	The Netherlands	Interview and text study, student tasks	*N* = 16	15–16	Empathy tasks	Types of empathy tasks in textbooks, cognitive and affective elements in students' responses to empathy tasks, students' perceptions of empathy tasks
Kosti et al. (2015)	Greece	Pilot study, teacher research	*N* = 22	12–13	Bronze age, Hellenic colonisation, the legislation of Solon, from Peisistratus to Cleisthenes	Drama-in-education and the development of historical empathy
Nygren (2016)	Sweden	Practice-based research	*N* = 39	17–18	Indigenous peoples' human rights	The relationship between historical thinking and empathy in ethically charged and pedagogically challenging topics
Rantala et al. (2016)	Finland	Intervention, case study	*N* = 22	16–17	The Civil War in Finland	Assessing students' historical empathy during a teaching intervention
Davison (2017)	New Zealand	Intervention, comparative case study	*N* = 45	14–15	The 1915 Gallipoli campaign	Presents and discusses affective and cognitive dimensions of historical empathy in 'The Empathic Pathway'
de Leur et al. (2017)	The Netherlands	Experimental study, pre- and post-test design	*N* = 254	14–16	Dutch Iconoclasm	The effect of first-person, third-person and factual recount writing tasks on students' responses to empathy tasks
Savenije and De Bruijn (2017)	The Netherlands	Descriptive, case study	*N* = 22	15–19	'Child at war', a Dutch museum exhibition	Students' engagement in the cognitive and affective dimensions of historical empathy in the museum exhibition
Perrotta (2018)	USA	Intervention, case study	*N* = 24	12–14 + 16–18	An under-represented historical figure: Elizabeth Jennings	Impact of students' social identities on historical empathy
Efstathiou et al. (2018)	Cyprus	Mixed methods, pre- and post-design	*N* = 53	7–8	Neolithic settlement	Location-based augmented reality technologies in an archaeological site to enhance historical empathy

Gilbert (2019)	USA	Interview study	*N* = 14	14–18	*Assassin's Creed*, different historical scenarios	How *Assassin's Creed* influences students' perceptions of the past, and how they perceive historical characters and stories in the game
Nolgård and Nygren (2019)	Sweden	Document analysis, student tasks	*N* = 126	15–16	Romani people, national minority in Sweden	The interplay of historical thinking and empathy as caring in students' writing
Perikleous (2019)	Cyprus	Collective case study, descriptive	*N* = 68	9–12	Religious practices to cure illnesses	Primary students' ideas of historical empathy
Uppin and Timostsuk (2019)	Estonia	Intervention, case study	*N* = 76	15–16	Estonian refugees during the Second World War	Testing the usefulness of a historical empathy framework (Endacott and Brooks, 2013) in a museum setting
Wilschut and Schiphorst (2019)	The Netherlands	Mixed methods, pre- and post-test design	*N* = 99	15–16	Controversial historical persons: Robespierre and Thomas Jefferson	Quantitative and qualitative assessment of historical empathy and perspective reconstruction
Jun (2020)	South Korea	Group interviews, task-based	*N* = 16	16–17	'Comfort women' in South Korea	The interplay of students' national identity and affective historical empathy
Bartelds et al. (2020)	The Netherlands	Interviews	*N* = 17	16–19	Historical empathy as a concept	Teachers' and students' beliefs about historical empathy
Palma Flores and Albornoz Muñoz (2022)	Chile	Intervention, case study	*N* = 27	11–15	Difficult past: the 1973 coup d'etat in Chile, dictatorship	The historical thinking operations that young people deploy when taught about a difficult past
Petousi et al. (2022)	Greece	Mixed methods	*N* = 15	Teenagers	Ancient Athens, slavery	Collaborative interactive digital storytelling and the promotion of historical empathy, focus on affective connection
Riner et al. (2022)	USA	Mixed methods, quasi-experimental	*N* = 44	14–15	Anne Frank	Virtual reality and the development of historical empathy
Wagner and Dversnes (2022)	Norway	Action research	*N* = 24	18–19	Slavery in the USA, feature film	Using a feature film about slavery to enhance historical empathy
Yancie (2022)	USA	Intervention, case study	*N* = 25	16–17	Racism and racial injustice in American history	Perspective-writing tasks and dialogue, and their influence on students' historical empathy skills
Bartelds et al. (2023)	The Netherlands	Quasi-experimental, pre-post-follow-up-design	*N* = 97	15–16	The Israel–Palestine conflict	Promoting general empathy using eyewitnesses in the history classroom
Çakiroglu et al. (2023)	Turkey	Mixed methods, intervention, case study	*N* = 17	13–14	Atatürk, Turkish history	Examine the effectiveness of using augmented reality in gaining historical empathy skills
Conner and Graham (2023)	USA	Mixed methods, intervention, case study	*N* = 16	15–16	The Holocaust	The impact of a model of historical empathy (Endacott and Brooks, 2013) to teach the Holocaust

Çopur et al. (2023)	Turkey	Intervention, case study	*N* = 32	12–13	Ancient history	Determine the effect of creative drama method on students' historical empathy skills
Hagen (2023)	Norway	Focus group interviews	*N* = 41	14–15	The Holocaust	Students' understanding of perpetrators' motivation, and reflection on contemporary extremism
Nielsen (2023)	Sweden	Descriptive, case study	*N* = 38	8–10	Bronze Age, 1700–300 BCE	How young students' visit to a heritage site contributes to their historical empathy
Karn (2024b)	Canada	Reflection on her own practice	–	14–17	First and Second World War battlefields in Belgium and France	Experiential learning outside classrooms and the fostering of historical empathy

Conceptualisations

Brooks (2009) concluded that historical empathy was conceptualised in multiple and sometimes incoherent ways. The studies included in this review also present different conceptualisations; however, some clear patterns can be found. First, most researchers conceptualise historical empathy as consisting of both cognitive and affective dimensions. In addition, a subtle shift in the description of the concept seems to have occurred over time: from taking to understanding a historical agent's perspective. Last, two conceptual frameworks or models of historical empathy emerge as particularly influential on empirical research.

Most of the included articles assert that historical empathy is a contested concept, referring to the debate on whether historical empathy should primarily promote cognitive skills and/or affective approaches to historical topics. However, when it comes to the actual application of historical empathy in these studies, there is little controversy. Thus, an important finding of this review is that the concept appears to be minimally contested in empirical research, with broad consensus that it encompasses both cognitive and affective dimensions. There are only two exceptions which emphasise the cognitive dimension alone: D'Adamo and Fallace (2011) and Wilschut and Schiphorst (2019). Five studies focus only on the affective dimension in their research, although they acknowledge that there are cognitive dimensions as well (Endacott, 2010; Nygren, 2016; Nolgård and Nygren, 2019; Jun, 2020; Riner et al., 2022). In some studies exploring students' perceptions of historical empathy (Davison, 2014; de Leur et al., 2015; Bartelds et al., 2020), students also mentioned both cognitive and affective dimensions. However, two studies found that students primarily emphasised the cognitive aspect of historical empathy (Wilschut and Schiphorst, 2019; Bartelds et al., 2023).

Thus, there is broad agreement that historical empathy encompasses both cognitive and affective dimensions. This finding supports Karn's (2023: 83) claim that researchers and educators today tend to understand historical empathy as a 'cognitive-affective' concept. Additionally, some of the included studies report empirical results that underscore this theoretical stance: results show that both dimensions were present in students' learning processes (Palma Flores and Albornoz Muñoz, 2022), and that both were important for enhancing historical empathy (Seng and Wei, 2010). Furthermore, there is evidence that cognitive and affective dimensions are closely interwoven in students' learning processes (Nygren, 2016; Nolgård and Nygren, 2019; Nielsen, 2023; Karn, 2024b).

Another interesting pattern is a subtle change in the description of the concept over time, from metaphors that describe an experience, such as *walking in other people's shoes*, to descriptions of a skill, outcome or process, namely, *to understand and explain perspectives*. Perhaps this development is a response to the criticisms of historical empathy presented above: it is impossible to fully step into past agents' 'shoes', and efforts to do so may lead to over-identification, sympathy or pure imagination, rather than to historical learning (Perikleous, 2014; Retz, 2015; Endacott and Brooks, 2018). The development could also be influenced by language in the influential framework by Endacott and Brooks (2013: 41),

which describes historical empathy as 'the process of students' cognitive and affective engagement with historical figures to better understand and contextualize their lived experiences, decisions, or actions'.

Few of the included studies discuss theoretical or philosophical underpinnings. Four articles briefly present R.G. Collingwood, one Leopold von Ranke and one Hans-Georg Gadamer. One exception is Wilschut and Schiphorst (2019), who thoroughly discuss the influence of several philosophers of history (Wilhelm Dilthey, R.G. Collingwood, Carl G. Hempel and William H. Dray) on the concept of historical empathy. That few discuss philosophical underpinnings suggests that the pedagogical frameworks and models serve to bridge the gap between theoretical work on historical empathy and classroom practices, supporting educators and researchers as they plan instruction.

Two frameworks or models are particularly influential in the included studies. First, Barton and Levstik's (2004) idea of historical empathy as perspective recognition and care has been used in 13 studies (Colby, 2010; Brooks, 2011; Metzger, 2012; Nygren et al., 2014; Nygren, 2016; Savenije and De Bruijn, 2017; Gilbert, 2019; Nolgård and Nygren, 2019; Jun, 2020; Palma Flores and Albornoz Muñoz, 2022; Riner et al., 2022; Wagner and Dversnes, 2022; Nielsen, 2023). Perspective recognition includes a 'sense of otherness' (people of the past were different from myself), and the idea of 'shared normalcy' (we still share a common humanity). Additionally, historical contextualisation, incorporating multiple historical perspectives, and contextualising the present are important elements of perspective recognition (Barton and Levstik, 2004). There are four types of care: (1) *caring about* the historical topic gives motivation and interest; (2) *caring that* injustices have happened incites moral responses; (3) *caring for* historical actors who experienced injustice creates a longing for change; and (4) consequently, students may *care to* change the present.

Equally important is Endacott and Brooks's (2013) theoretical and practical model for promoting historical empathy, which has been used in 12 articles (Endacott, 2014; Virja and Kouki, 2014; Rantala et al., 2016; de Leur et al., 2017; Savenije and De Bruijn, 2017; Efstathiou et al., 2018; Uppin and Timostsuk, 2019; Palma Flores and Albornoz Muñoz, 2022; Petousi et al., 2022; Wagner and Dversnes, 2022; Conner and Graham, 2023; Hagen, 2023). Three studies use both frameworks and therefore appear in both lists above: Savenije and De Bruijn (2017); Palma Flores and Albornoz Muñoz (2022); and Wagner and Dversnes (2022).

According to Endacott and Brooks (2013), historical empathy combines historical contextualisation, perspective taking and affective connection. Historical contextualisation entails gaining a broad understanding of the society and/or event in question. Perspective taking involves understanding that past agents' thoughts were influenced by their contexts. Affective connection brings understanding of how affections may have influenced the lives of past agents, given our 'similar yet different life experiences' (Endacott and Brooks, 2013: 43).

To sum up, a broad consensus has emerged that historical empathy encompasses both cognitive and affective dimensions, as Karn (2023) also suggests. This dual understanding is found in Endacott and Brooks (2013) and Barton and Levstik (2004), as well as in conceptualisations in the included studies, and this understanding is supported by empirical evidence. A shift seems to have taken place from a more experiential, metaphorical description of the concept to one that emphasises understanding and explanations of historical perspectives. These conceptualisations provide important context for presenting and discussing the findings in this review, as the included research generally shares this understanding of what it means to take or understand historical perspectives: students need to develop both cognitive skills, such as contextualisation and working with evidence, and affective dispositions, such as care, mentalisation and longing for justice. This corresponds to what Endacott and Brooks (2018: 212) call 'proximate goals' of curricular and methodological learning and 'ultimate goals' of democratic learning for life.

Factors that influence learning

Ability to contextualise and work with evidence

Three studies report that working with sources facilitated historical empathy. Seng and Wei (2010: 526) argued that sources presenting different perspectives were useful, when students were allowed to 'approach the sources from their own perspectives, knowledge, and experience'. Kosti et al. (2015: 15) suggested that drama-in-education, combined with sources, helped students in '"harnessing" imagination with evidence'. Participants in Karn (2024b: 34) were given ample opportunity to work with

historical sources, including written sources, 'artefacts, monuments, and landscapes', and oral sources. One finding was that being *in situ*, experiencing, for instance, weather or distance, influenced students' understanding of other types of sources, such as a diary written in the same place (Karn, 2024b: 35). Another finding was that the affective elements of historical empathy 'augmented students' abilities to examine sources' (Karn, 2024b: 35).

Conversely, other studies found that students struggled to use sources effectively in their learning. Colby (2010) gave examples of four students' reading of the same historical sources and found that their understanding of sources as event, text and subtext was limited. Nygren et al. (2014) show that students were not used to working with primary sources. Nygren (2016) concluded that there was minimal sourcing and corroboration in students' texts, and Nolgård and Nygren (2019: 8) found that sourcing was 'the least salient category' in their data. Savenije and De Bruijn (2017) reported that students generally did not include historical sources and evidence in their end products, and Gilbert (2019) found that the participants trusted the narrative of *Assassin's Creed* without corroboration. Although the participants were aware that the game was a narrative with a particular purpose, they trusted that historians' involvement ensured an 'unbiased' history (Gilbert, 2019: 127). This suggests that teachers need to prepare students to work critically with both primary and secondary sources, considering their reliability and purpose.

Historical contextualisation also posed challenges for students in many studies, for different reasons. Age and maturity play a role (D'Adamo and Fallace, 2011). However, progression with age is not universal and linear; rather, students approach different historical topics differently (Brooks, 2011). Berti et al. (2009) found that deficit explanations of the medieval practice of ordeal were most frequent among participants aged 12 and above, not among the youngest. The researchers argued that this is due to a bleak picture of the Middle Ages in school textbooks. In addition, participants perceived the past as unintelligible or incoherent when they did not understand the texts they were working with or the 'rationale behind' practices (Berti et al., 2009: 286).

Strong moral messages conveyed in teaching situations may also hinder contextualisation (Metzger, 2012; Savenije and De Bruijn, 2017). Additionally, students' lack of substantive knowledge may impede contextualisation (Perikleous, 2011; Savenije and De Bruijn, 2017; Perikleous, 2019; Hagen, 2023). de Leur et al. (2017: 343) found that students generally 'scored relatively low on the historical knowledge test', highlighting the possibility that students may lack the substantive knowledge required for effective contextualisation.

In seven studies, students managed processes of contextualisation (Brooks, 2011; Chisholm et al., 2017; Palma Flores and Albornoz Muñoz, 2022; Çakiroglu et al., 2023; Conner and Graham, 2023; Nielsen, 2023; Karn, 2024b), and three studies found slight improvement in student contextualisation (Rantala et al., 2016; Wilschut and Schiphorst, 2019; Petousi et al., 2022). Several factors are important to enhance contextualisation: teacher beliefs, planning and scaffolding practices (Brooks, 2011; Conner and Graham, 2023); temporal and personal distance to national difficult history (Palma Flores and Albornoz Muñoz, 2022); immersion in augmented reality, paired with teacher-led discussions about students' learning (Çakiroglu et al., 2023); and learning *in situ* (Nielsen, 2023; Karn, 2024b).

To sum up, working with sources as evidence and contextualisation are important yet challenging elements of historical empathy. Teachers cannot assume that students have the skills or sufficient substantive knowledge; they need to consider students' age and cognitive development, and to challenge presentist moral judgement.

Ability to see multiple perspectives

A surprising finding is that all text fragments coded as multiple perspectives indicate that students demonstrated the ability to recognise multiple historical perspectives. Nygren (2016: 131) found that students engaged in 'perspective recognition'. Various studies report student progress towards a deeper understanding of multi-perspectivity (Brooks, 2011; Rantala et al., 2016; Savenije and De Bruijn, 2017; Petousi et al., 2022; Yancie, 2022; Conner and Graham, 2023; Nielsen, 2023), with some indicating greater progress in relation to multiple perspectives compared to other dimensions of historical empathy (D'Adamo and Fallace, 2011; Nygren, 2016; Efstathiou et al., 2018; Gilbert, 2019).

Adding nuances to these findings, de Leur et al. (2017) found that multiple perspectives were used most in factual recount tasks, while first and third person tasks encouraged the perspective of the antagonist. Savenije and De Bruijn (2017: 840) claimed that although the multiple perspectives

students encountered in the museum exhibition fostered engagement and new understanding, students did not 'move towards integrating these points of view into their existing narratives'. Gilbert (2019: 124) found that the gamers in her study recognised and considered new historical perspectives, but inferred, somewhat problematically, that this validated *Assassin's Creed* as an 'impartial and trustworthy portrayal of history'. These findings suggest that students may need help to critically evaluate and integrate different historical perspectives.

Nevertheless, evidence indicates that taking multiple perspectives is easier for students than working with sources, and the skill of contextualisation, and that it might be a good starting point for enhancing historical empathy.

Students' engagement and emotions

Generally, studies that have researched the affective dimensions of historical empathy report that students demonstrated affective connection, as described by Endacott and Brooks (2013), and/or care, as understood by Barton and Levstik (2004).

Many studies explicitly reported heightened student motivation, curiosity and interest (Brooks, 2011; Kosti et al., 2015; Gilbert, 2019; Wilschut and Schiphorst, 2019; Riner et al., 2022; Wagner and Dversnes, 2022; Çakiroglu et al., 2023; Çopur et al., 2023; Nielsen, 2023). This increase in engagement is attributed to a sense of historical authenticity, of coming closer to history, and of history coming to life. Notably, many of these studies employed immersive teaching approaches: feature films (Wagner and Dversnes, 2022), drama (Kosti et al., 2015; Çopur et al., 2023), narrative video games (Gilbert, 2019), augmented and virtual reality (Riner et al., 2022; Çakiroglu et al., 2023) or experiential learning (Nielsen, 2023).

Some of the included studies found that the learning process evoked challengingly strong feelings, likely due to the combination of historical topic and teaching material. Some examples are the film *The Pianist* about the Holocaust (Metzger, 2012); a digital story about slaves in ancient Athens where students played a first-person character (Petousi et al., 2022); the film *12 Years a Slave* about slavery in the USA (Wagner and Dversnes, 2022) and personal narratives and visits to battlefields used to teach about the First and Second World Wars (Karn, 2024b). The historical topics in these projects are likely to spark emotions, and the media used are immersive.

Strong feelings can be difficult for students to manage. Karn (2024b: 37) suggested that students need support to process strong feelings such as 'sadness or despair'. Learning about the Holocaust, for instance, reveals how ordinary people can become part of violent systems, and Hagen (2023) recommended being aware of the potential emotional difficulty for students. Metzger (2012: 399) highlighted a case where a student with a German father was not helped to 'navigate the complicated personal and moral issue' raised by watching *The Pianist*.

Conversely, other students expressed little engagement, emotion or affective connections. Half of the students in Savenije and De Bruijn (2017: 839) said that they were not emotionally triggered 'enough' by the museum exhibition and would have preferred a film. Rantala et al. (2016) stated that students find it difficult to relate to emotions of people in the past, particularly regarding extreme actions. Karn (2024b: 37) found that some students felt 'a significant sense of separation between the past and the present'.

Few articles explicitly discussed results concerning imagination, but the few that did were positive. This is somewhat surprising, given the critique that imagination may hinder historical empathy. Seng and Wei (2010) and Kosti et al. (2015) argued that imagination could enhance historical learning when paired with evidence. Davison (2014: 17) suggested that imagination should be part of 'affectively entering into the past', the first step of his Empathy Pathway. Nielsen (2023: 9) found support for this starting point in her research: emotional involvement helped to 'kick-start the pupils' imaginations and empathy', and made them want to travel back in time.

Overall, it seems that affective connections and emotions are readily, and perhaps even intuitively, present in students' learning processes, more so than the skills of working with evidence and contextualisation. This aligns with Karn (2023), who argued for the inclusion of affective dimensions in historical empathy, as they are influential in learning processes even when not explicitly planned for by teachers.

Presentism and moral judgement

Perspective recognition encompasses shared normalcy and a sense of otherness (Barton and Levstik, 2004). These complementary concepts acknowledge that learners and historical agents share a common humanity yet exist in very different worlds. Evidence indicates that students can hold these ideas simultaneously (Brooks, 2011; Nielsen, 2023). However, balancing the two is difficult for students, and presentism has been observed in many studies (D'Adamo and Fallace, 2011; Perikleous, 2011; Rantala et al., 2016; Gilbert, 2019; Perikleous, 2019; Wilschut and Schiphorst, 2019; Çopur et al., 2023; Nielsen, 2023; Karn, 2024b). For instance, participants discussed past events through the lens of general moral reasoning or modern ideas of civil and human rights, but detached from specific historical contexts (Nygren et al., 2014; Virja and Kouki, 2014; Yancie, 2022). Furthermore, there appears to be a close relationship between presentism and moral condemnation of the past. Rantala et al. (2016) found that some students moralised rather than empathised and Nygren (2016) that the category 'judging' was prominent in students' writing. de Leur et al. (2015) showed that affective responses to empathy tasks often led to condemning the past from a present-day perspective, while de Leur et al. (2017) found that students' first-person written accounts of historical events heightened the risk of both presentism and moral judgement.

Several studies suggest explanations for students' moral judgement. One explanation may lie in students' acceptance of grand narratives in contemporary society, such as narratives of progress (Nygren, 2016) or the 'poor little child laborer' (de Leur et al., 2015: 81). There is also a connection between explicit teaching goals and moral responses. Metzger (2012: 404) noted that the teacher 'framed the Holocaust as a universal narrative of hatred, excessive brutality, and human progress', resulting in deeply moral learning outcomes, such as universal justice and anti-racism. There are similar findings in Savenije and De Bruijn (2017). Based on his results, Nygren (2016: 130) questioned whether 'history teaching may become a moral tool at the expense of historical thinking'.

Nygren (2016) and Nolgård and Nygren (2019) both raised the question of how to teach emotionally or ethically charged topics in a way that balances caring and thinking. Table 2 shows that many of the included studies address emotionally or ethically charged topics.

Table 2. Historical topics in the included studies

Historical topic	Number of studies
Other conflicts or wars	7
First World War and Second World War	6
The Holocaust	4
Historical figures – controversial or under-represented	4
Minority groups	4
Slavery, racial injustice	2

The literature offers limited discussion on why certain historical topics have been chosen over others in research on historical empathy. On the one hand, the First and Second World Wars, the Holocaust and the history of different minority groups are central to many national curricula, making their inclusion in history education expected. On the other hand, other important historical topics are also part of curricula and could have been chosen. Perhaps the ultimate goal of historical empathy, democratic citizenship, influences the choice of topics.

However, it is possible for students to avoid presentism and develop more contextualised thinking to some degree (Brooks, 2011; Rantala et al., 2016; Wilschut and Schiphorst, 2019; Nielsen, 2023). Wagner and Dversnes (2022) found that the degree of presentism varied within the student group. Those at the highest level 'acknowledged that they would probably have held the values of that time', indicating their ability to set aside their own ideas (Wagner and Dversnes, 2022: 11). Karn (2024b) concluded that participants were able to judge leaders in the past based on historical sources, geographical and

contextual knowledge, and multiple perspectives. These results indicate that making judgements is possible without succumbing to presentism and condemnation.

An important finding is that all explicit discussion of pitfalls and challenges (Endacott, 2010; Brooks, 2011; Metzger, 2012; Endacott, 2014; Virja and Kouki, 2014; Uppin and Timostsuk, 2019) relate to moral responses, affective connections, care and feelings. There are no cautions that excessive emphasis on contextualisation or evidence may inhibit moral responses, affective connection or emotions. Rather, there are warnings that prioritising moral responses and affective connections can overshadow the importance of contextualisation and evidence.

Identification and identity

Several articles discuss student identities and identification, and their influence on historical empathy. Jun (2020) found that national identity impacted how the participants expressed care for South Korean 'comfort women'. Berti et al. (2009) suggested that the cultural differences between Catholic Italy and Anglican England may explain why students perceived the ordeal differently in their study than in the original study (Lee and Shemilt, 2003). Wagner and Dversnes (2022) found that boys contextualised better than girls, who exhibited higher emotional involvement. Endacott (2014) argued that affective responses are influenced by students' personality and personal background.

Perrotta (2018: 53) aimed to explore whether students' social identities influenced 'exhibition of' historical empathy. Her project introduced students to Elizabeth Jennings, an African American woman who protested against segregation on public transport in the 1850s. Perrotta (2018) found an 'empathy gap' in the exhibition of historical empathy. White students displayed written skills in 'identifying historical context and perspectives' (Perrotta, 2018: 65) yet claimed that racism was not a problem in their contemporary society. African American students 'were more proficient in making affective connections to content during class discussions, the debate activity, and focus group sessions' (Perrotta, 2018: 63). Yancie (2022) also found that African American students connected affectively yet performed less contextualisation. In the study by Conner and Graham (2023), 15 out of 16 students identified as minorities in 'race, religion, or immigration status', and they used their own experiences to connect to Holocaust survivors and to ordinary Germans during the Holocaust. Palma Flores and Albornoz Muñoz (2022) conducted their research on difficult past periods in Chile at a school in a low-income area, finding that students empathised with victims of injustices, whether these victims belonged to their family or to other disadvantaged groups and were members of underprivileged classes. Thus, social identities influence the degree to which students connect to people in the past, possibly in particular when they share a minority identity.

There are also examples that learning historical empathy influenced participants' identities, their reflections on the present and their actions in the present. Some students were able to contextualise their present society and/or saw it as a result of past processes (Brooks, 2011; Nolgård and Nygren, 2019; Nielsen, 2023). Uppin and Timostsuk (2019: 318) found that the museum visit they studied helped students identify with 'their own ancestors', leading some to talk to their grandparents about the Second World War. They also made comparisons between 'the WWII Baltic Sea boat refugees' and contemporary migration across the Mediterranean Sea (Uppin and Timostsuk, 2019: 318). Playing *Assassin's Creed* led participants to revisit 'their understandings of themselves', such as their social identity as 'American' (Gilbert, 2019: 125). They also experienced multiple historical perspectives that differed from what they had been taught in the US school system, prompting some to question the 'heroizing narratives' (Gilbert, 2019: 128) in school history instruction. Students in Jun (2020) *cared to* change the present as democratic citizens, and some participants in Karn (2024b: 36) acted in the present, for instance, by organising an 'appreciation luncheon' for Canadian war veterans.

Implications for teaching historical empathy

In this last section, I briefly summarise the findings presented above and discuss their implications for educators. The research questions for this review have been:

RQ1. In the included studies, what factors are particularly influential on students' learning processes towards historical empathy?

RQ2. What are possible implications of these factors for educators who seek to enhance historical empathy?

To answer RQ1, several patterns of influential factors emerge from the included studies. First, students' ability to contextualise is a fundamentally influential factor. However, several articles find that historical contextualisation is difficult for students, although it can be facilitated with effective teacher scaffolding. Additionally, substantive knowledge is crucial for developing historical empathy. Further, multiple perspective-taking appears to be easier than contextualisation for students. Affective connection and emotional engagement are also influential factors, often strongly present in learning processes aimed at historical empathy. These affective dimensions may lead not only to interest and new understanding, but also to the pitfalls of presentism and moral judgement. Last, the contemporary society through values and grand narratives and students' identities are factors that significantly shape students' learning of historical empathy. Moreover, students' present identities are influenced by the process of learning historical empathy.

These findings suggest several implications for educators, summed up in Table 3.

Table 3. Implications for teaching for historical empathy

Considerations concerning elements of historical empathy
Introducing multiple historical perspectives
Providing substantive knowledge
Scaffolding students' historical contextualisation and work with evidence
Harnessing affective dimensions
Encouraging moral responses yet challenging presentist judgement
Considerations concerning other factors
Awareness of student identity
Awareness of societal and educational contexts
The historical topic

These considerations are essential for planning historical empathy teaching, and they are relevant at a pedagogical level that bridges theoretical models (see, for instance, Karn, 2023; or the theoretical model in Endacott and Brooks, 2013) and detailed lesson planning tools (see, for instance, Karn, 2024a, or the instructional model in Endacott and Brooks, 2013). Table 3 is not an exhaustive list of possible considerations, but it highlights the central themes in empirical research from 2009 and onward.

The first five considerations relate to different elements of historical empathy. They bring nuance to, and adjust the balance between, elements found in established theoretical models of historical empathy (Endacott and Brooks, 2013; Davison, 2014; Karn, 2023).

First, introducing multiple historical perspectives could be a useful gateway into historical empathy. This element is present in all the previous theoretical models: 'Historical perspectives' (Karn, 2023), 'Perspective taking' (Endacott and Brooks, 2013) and 'Finding multiple perspectives' (Davison, 2014). As discussed above, findings indicate that students often progress in recognising multiple historical perspectives, although they may need help to integrate new perspectives into their existing understanding. Still, this could serve as a good starting point for enhancing historical empathy, and further research could empirically explore this approach.

Second, educators need to provide substantive knowledge. Based on findings in this review, the importance of substantive knowledge should be emphasised more strongly than in previous models. Substantive knowledge is implicitly present in these models in the elements of contextualisation and working with evidence. Yet findings suggest that substantive knowledge is essential for effective contextualisation. Based on Christine Counsell's research, Schüllerqvist (2014) warned against a shift in history education from mere memorisation of substantive facts to generic competences devoid of historical content. Today, there are indications that the warnings were appropriate. Internationally,

the idea of competences has become influential also in history education – see, for instance, how the Council of Europe's (2018) guidelines for quality history education are intertwined with competences for democratic culture. The Norwegian Curriculum for Social Studies (Utdanningsdirektoratet, 2019) also exemplifies how historical content receives less attention. These developments warrant a reminder that substantive knowledge of the historical topic at hand is fundamental for developing historical empathy.

The third consideration calls for scaffolding students' historical contextualisation and work with evidence. That contextualisation is crucial is evident in the previous theoretical models, as well as in the studies included in this review. This skill is important for understanding the historical context and how it influenced historical actors' lives. However, contextualisation is difficult for students, and teachers need to carefully scaffold this process. More research is needed to understand and enhance students' ability to contextualise. Research on the concept of *contextualisation* can give relevant insight here (see, for instance, Huijgen et al., 2018).

The fourth consideration involves harnessing affective dimensions. Affective dimensions are described in all the models, and findings reveal that they are often strongly present in teaching for historical empathy. Immersive teaching media, such as excursions, augmented reality, films and video games, heighten interest and motivation, and make students feel closer to the past. Harnessed affective dimensions, paired with substantive knowledge and evidence, allow students to apply their feelings, ideas and imagination to connect affectively to the past, while avoiding the affective pitfalls of pure imagination, over-identification or emotional distancing.

Last, educators should encourage moral responses while challenging presentist moral judgement. Judging the past is an element in theoretical models of historical empathy. Karn (2023) referred to it as 'Ethical Judgments', and judgement is also found in her element 'Caring', while Davison (2014: 17) called the corresponding element 'Making judgements'. Findings in this review show that one fundamental obstacle to historical empathy is students' presentist views and interpretations of the past, echoing Brooks (2009). There is a danger of presentist moral judgement, particularly when the topic is emotionally or ethically loaded. However, the ultimate goal of democratic citizenship and value-laden curricula often require educators and students to take a stand against injustice or discrimination, and to respond morally to the past. Many historical topics, such as war, slavery and discrimination, demand a moral response. However, this response must be based on substantive knowledge, historical contextualisation and awareness of one's own positionality in the present.

The last three considerations relate to an awareness of how external factors influence different elements of historical empathy. Findings in this review underscore that educators must consider present-day contexts, a point also emphasised in the theoretical work of Tyson Retz (2015, 2018). One context concerns students' social identities, which may influence learning processes for historical empathy, which in turn may affect students' lives in the present. An awareness of this influence is important, as historical empathy invites present-day perspectives into the learning process through affective connections, moral responses and care. More research is needed on the influence of students' social identities on their development of historical empathy.

The other context is contemporary society, with its narratives and values. Educators need to keep this in mind, since narratives and values influence how a particular historical topic is perceived, understood and judged. This need is corroborated by Harnes (2022), who found that neither the researcher nor the participating teachers considered the extent to which contemporary values and narratives about the historical topic, colonialism in Africa, influenced the learning processes. Thus, one might argue that the concept of historical empathy cannot be understood separately from historical topics; rather, the topic influences the way historical empathy plays out in the learning situation. Emotionally or morally charged topics require different considerations than topics that activate feelings to a lesser degree, and students' relation to the topic is also influential. The interplay between present contexts, different historical topics and teaching for historical empathy is an interesting area for further research.

The analysis in this review reveals a broader consensus about conceptualisations of historical empathy in empirical research on student learning. At the same time, it confirms that historical empathy is indeed a complex approach to teaching history, which can be rewarding yet challenging for both educators and learners. The synthesis of findings provides important insights into considerations that educators need to take into account when managing the balance of affective, cognitive and moral dimensions of historical empathy, in light of both past and present contexts.

Data and materials availability statement

Data sharing not applicable to this article as no datasets were generated or analysed during the current study.

Declarations and conflicts of interest

Research ethics statement

Not applicable to this article.

Consent for publication statement

Not applicable to this article.

Conflicts of interest statement

The author declares no conflicts of interest with this work. All efforts to sufficiently anonymise the author during peer review of this article have been made. The author declares no further conflicts with this article.

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