


Research article

Film as a gateway to teaching about slavery through historical empathy: a case study using *12 Years a Slave* (McQueen, 2013)

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Abstract

We have studied how eliciting historical empathy in a class of 13th grade students through using the film *12 Years a Slave* (McQueen, 2013) supported their in-depth understanding of slavery in nineteenth-century USA. Historical empathy is one of the core elements of the new curricular reform implemented from 2020 in Norway, and it is believed to have potential to strengthen: (1) students' future citizenship and participation in democratic and multicultural societies; and (2) students' in-depth understanding of history. We implemented a five-week lesson plan with different activities based around the film, and used students' assignments to evaluate their feelings about the lessons and their historical understanding of slavery. The results confirmed the potential of film to enhance historical empathy when the screening is well prepared and combined with relevant activities. Students demonstrated a high level of engagement and managed to perform complex tasks. Both their ability to contextualise and to 'care' improved. Particularly,

students' historical understanding of slavery was boosted by the group conversations and the dialogic nature of the activities in the classroom. In addition, we observed a greater positive influence on boys' achievements compared with girls' – a finding which is interesting in a wider educational context and which needs further exploration.

Keywords history education; historical empathy; historical thinking; film; slavery; *12 Years a Slave*

Introduction

In recent decades, historical empathy has been recognised as a major goal in the teaching of history in many countries, together with the shift from the mastering of factual content to cultivating historical and critical thinking skills and enhancing students' historical consciousness (Lévesque, 2008; Seixas and Morton, 2013; Van Drie and Van Boxtel, 2008).

Norway has taken this approach for at least a decade. The Knowledge Promotion Reform of 2006 (known as LK06) demonstrates that the history common core outlined the development of students' historical consciousness and of their insight into the diversity of values, attitudes and living conditions of people in the past as pivotal goals. Even more emphatically, the new curricular reform (known as LK20), which has been progressively implemented since 2020, prioritises the nurturing of students' historical consciousness and their understanding of historical events from different perspectives and in their own context. These objectives are embedded within two overarching purposes: (1) to develop students into proficient future citizens of democratic and pluralistic societies; and (2) to sustain students' in-depth learning and understanding of history as a discipline (Utdanningsdirektoratet, n.d.-a). Historical empathy has been highlighted as one of the core elements of the new history curriculum in order to achieve these goals, and it is clearly associated with the understanding of people's actions and challenges in their historical context (Utdanningsdirektoratet, n.d.-b).

Although the definition of historical empathy remains controversial (Brooks, 2009; Rantala et al., 2016; Retz, 2018), its potential to positively impact students' citizenship and support their critical thinking competencies has been largely acknowledged (Barton and Levstik, 2009; Brooks, 2009; Davison, 2013; Kohlmeier, 2006; Perikleous, 2014).

Additionally, history films are widely recognised for their ability to activate students' empathetic responses in order to promote a better understanding of historical events (Gilbert and Harris, 2017; Landsberg, 2009; Marcus and Levine, 2007; Metzger and Suh, 2008; Stoddard, 2007). This is especially true for films that touch upon *difficult history* (Stoddard et al., 2017).

Nevertheless, there is still a need to practically explore how students' historical empathy influences their historical learning (Endacott and Brooks, 2018). Very few empirical studies performed in classrooms have examined the impact of film's empathetic power on students' understanding of historical events that have already been presented in their context. The main purpose of this article is to investigate how and to what extent eliciting students' historical empathy, through a lesson structured around the film *12 Years a Slave* (McQueen, 2013), enhanced their understanding of slavery in the United States as a historical phenomenon.

Theoretical framework

Historical empathy and historical understanding

Although the term *empathy* has a long history, it has become the hallmark of the 'new' history education since the 1970s (Retz, 2018). It is well established and accepted that empathy is indispensable to understand and contextualise the actions, decisions, thoughts and attitudes of people in the past (Ashby and Lee, 1987; Barton and Levstik, 2009; Davis, 2001; Seixas and Morton, 2013). Although this has been subject to discussion, historical empathy is recognised as both a process and an outcome that is never fully completed (Endacott, 2014; Perikleous, 2019; VanSledright, 2001), partly because it can be seen as inferential thinking, based on the (fragmentary) evidence available about the past (Davis,

2001; Yeager and Foster, 2001), and partly because we cannot, as interpreters, fully disconnect ourselves from our own historical positions to understand the past (Lévesque, 2008; Retz, 2018; VanSledright, 2001; Wineburg, 2001).

However, the nature of historical empathy and what it involves, or should involve, is still highly disputed (Brooks, 2009; Marcus et al., 2010; Rantala et al., 2016; Retz, 2018; Wilschut and Schiphorst, 2019; Yilmaz, 2007). Most scholars confirm that historical empathy is not a matter of sympathising with, excusing or avoiding issues from the past. In part, they wish to limit its exercise to a cognitive act, while also considering empathy as involving both cognitive and affective abilities and attitudes (Barton and Levstik, 2009; Brooks, 2009, 2011; Davison, 2012; Endacott, 2010).

Consequentially, various models have been presented to categorise historical empathy. Ashby and Lee (1987) devised a five-level model focusing on cognitive skills, while Barton and Levstik (2009) distinguished five progressive levels of perspective recognition and four types of care to characterise historical empathy as involving both cognitive and affective abilities that motivate our interest in history (Table 1).

Table 1. Categorisation models of historical empathy (Source: Authors)

Ashby and Lee (1987)	Barton and Levstik (2009)	
	Perspective recognition	Care
'Divi past'	Sense of otherness	Caring about
Generalised stereotypes	Shared normalcy	Caring that
Everyday empathy	Historical contextualisation	Caring for
Restricted historical empathy	Multiplicity of perspectives	Caring to
Contextual historical empathy	Contextualisation of the present	

Concurring models have also been presented to describe how historical empathy should be promoted in class (Endacott and Sturtz, 2015; Yeager and Foster, 2001; Yilmaz, 2007). Yet, there is a need for examples of how it actually occurs within classrooms. Although research into historical empathy is growing, the study of historical empathy has reached a point where further empirical examinations from multiple perspectives are needed. In particular, we know relatively little about how students' emotional reactions influence their learning of history and their capacity to use perspective recognition (Endacott and Brooks, 2018).

While multiple studies have addressed how students could positively develop historical empathy through the use of written historical sources that are related to significant historical figures, such as Harry Truman (Yeager and Doppen, 2001) or Neville Chamberlain (Foster, 1999), fewer studies have investigated the stimulation of historical empathy and understanding through under-represented historical actors (Perrotta, 2018) and through other sources, such as film. For example, Rantala et al. (2016) explored the levels of empathy achieved by Finnish high-school students (N = 21) through a role play about different social groups in a Finnish village during the Civil War of 1918. More recently, De Leur et al. (2017) used static visual materials (a picture, a map) and written accounts about Dutch Iconoclasm. Huijgen et al. (2019b) used a documentary film and historical pictures about various aspects of the Cold War to trigger an emotional response. In this regard, it is interesting to study how students display historical empathy in relation to less significant or under-represented historical actors through the use of a compelling mainstream film.

The use of film to enhance empathy

The role of films and other visual media in people's knowledge and sense of the past is widely recognised (Ferro, 1993; Rosenstone, 2006; Wineburg et al., 2001). Further, it is acknowledged that history films are constructed representations of the past that are deeply situated in, and reflect, their cultural, political, economic and social context of production (Frodon, 1998; Marcus et al., 2010; Rosenstone, 1995), and, as such, they are a contribution to the historical debate in the public sphere (Rosenstone, 2006). It is also recognised that films are extensively used by teachers in history lessons and have potential as tools to

learn about history or better educate students as critical thinkers (Donnelly, 2014; Marcus et al., 2010; Paxton and Marcus, 2018; Russell and Waters, 2017).

One of film's most undisputed qualities is its capacity to mobilise students' cognitive skills and emotions, and to direct the spectators' empathy through the perspectives from which the story is narrated. This is especially true when they are about powerful, compelling events such as slavery or the Holocaust (Davis, 2000; Gilbert and Harris, 2017; Marcus et al., 2010; Metzger and Suh, 2008; Stoddard, 2007). The emotional engagement elicited by film may open the path to personal and existential reflections through the relationships that the spectator establishes with the film's characters (being either partial identification or blatant aversion).

Using *12 Years a Slave* (McQueen, 2013) in the history classroom

Based on Solomon Northup's memoir from 1853, *12 Years a Slave* is an emotionally captivating and deeply engaging film about a topic scarcely depicted on the silver screen (Brown and Davis, 2014). It is an important contribution to the discourse on slavery and Black history in the USA (Beck, 2014). *12 Years a Slave* has been critically acclaimed, having received three Oscars, and having made over US\$187 million in 2013–14 (Box Office Mojo, n.d.).

It is praised by historians for its historical accuracy, even though some questions continue to be raised about certain scenes (Roberts and Elfer, 2017) and about the relative lack of institutions and structures in its depiction of slavery as a system (Brown and Davis, 2014). McQueen's film challenges many of the misrepresentations rooted in textbooks, and in films such as *Gone with the Wind* (Fleming, 1939), or avoided by other important films such as *Glory* (Zwick, 1989) or *Amistad* (Spielberg, 1997). Not only does it depict slavery through the perspective of an African American, but it also illustrates the varied and complex psychological, social and economic aspects related to slavery as an organised system (Stoddard, 2014).

In the USA, teaching about slavery can still be very difficult, since the topic is largely debated, and linked to sensitive issues of identity, race, ethnicity, class, and moral and social justice in American society (Garrett, 2011; Loewen, 1991; Stoddard, 2009). In Norway, the debate over slavery is less controversial and, as a former colonised country, Norway feels freer from any disconcerting moral conscience than many other European countries (because of their implication in the Atlantic trade). This may be the case, even though recent debates have shed new light on the role of the Danish–Norwegian West Indian and Guinean Company, and of the investments of some prominent Norwegian-born citizens (such as historian and writer Ludvig Holberg) in the slave trade in the eighteenth century (Herbjørnsrud, 2020).

Former studies about film and historical empathy among students

Few studies have examined the benefits of the use of film for the development of historical empathy among students.

Cutajar (2018) used moving images with a history class in Malta, but focused on students' verbal engagement and interactions. Davison (2012, 2013) performed a captivating and comprehensive study on younger students, extensively using films and written sources, particularly scrutinising how they interpreted the notion of historical empathy.

In a sense, our study is a sequel to Scott Metzger's (2012) investigation, which used *The Pianist* (Polanski, 2002) among high-school students to investigate the potential and limits of historical empathy, in regard to perspective recognition and care. Metzger (2012) concluded that the emotional and visual power of the film could lead the students to over-empathise with the characters, and that the 'caring' aspect of empathy could impede the understanding of the historical context and the application of content-knowledge. However, these results seem consistent with the fact that Kellie, the teacher followed by Metzger (2012) during this study, had not given her students the means or tools to contextualise the content of the film or to connect it to content-knowledge about the period. Her main goal was to use the film to encourage reflections about present-day or universal moral and ethical standards related to racism and discrimination, and not explicitly to develop a contextual understanding of the Holocaust.

The aim of our study is to investigate what happens when students have been introduced to the historical context and are specifically instructed to try to adopt the perspectives of the various characters of a difficult history film such as *12 Years A Slave*. We raised two main research questions:

1. How did the students experience such a unit?
2. What did they learn about the history of slavery through the unit?

What kinds and which levels of historical empathy did they demonstrate after watching *12 Years a Slave*? Did 'caring' interfere with 'perspective recognition'? Were students able to contextualise the different perspectives shown in the film and to make reasoned ethical judgements about them? Could we see an evolution in students' understanding of slavery at the end of the unit, after they had participated in group discussions about the film?

Method

Our investigation is a qualitative study combining action research and a case study to analyse and understand processes occurring in the classroom which are connected to real-life events – following principles exposed in Merriam (1998) and Maxwell (2008).

Context

This study was conducted at a high school of just over 2,000 students, from 11th grade to 13th grade. The school is located in a rural community in the south-western part of Norway. The participants were 24 students from the same class in the 13th grade of the general curriculum. There were 12 girls and 12 boys of ages 18–19.

The history curriculum in 13th grade in Norway comprises four weekly lessons of 45 minutes, covering the period from 1700 to the present. Teachers have a lot of autonomy regarding their pedagogical tools and the way that they choose to divide up the time spent on each topic. They have a responsibility to embrace the whole period to equip the students with a referential content-knowledge basis, but they are especially required to adhere to the attitudes and historical competencies defined in the common core.

The unit lessons and data collection

Following Yeager and Foster's four-stage model (2001) and the three-step model from Endacott and Brooks (2013) and Endacott and Sturtz (2015), we designed a five-week unit on the history of slavery in the USA. Our unit was centred on *12 Years a Slave* (McQueen, 2013), with an introduction and a content-based presentation of the context, including activities with various historical sources and an introduction to the film. We additionally incorporated real-world activities about the film, where students had to demonstrate their capacity of analysis and judgement (see Figure 1, as well as Table 4 at the end of this article). The students did not receive explicit instructions about *how* to contextualise, as they did in Huijgen et al. (2019b), but they received explicit content-knowledge about the different contextual elements of the topic in question. In addition, a plenum discussion focused on the nature of the film as a constructed representation of slavery situated in its own (contemporary) time and as the result of cultural, social and economic conditions, and of McQueen's interpretation of Northup's book. The teacher also highlighted the goals of the unit in terms of historical competencies and attitudes, as well as the importance of understanding people in the past in their context – which has been stressed in multiple studies (Endacott and Brooks, 2013; Marcus et al., 2010; Perikleous, 2019).

We also integrated group discussions, in order to give students the opportunity to reflect upon their understanding of the film and the topic of slavery. As highlighted by Kohlmeier (2006), Brooks (2008) and Rantala et al. (2016), group discussions are often more thought-provoking and efficient than individual reflections alone. When composing the groups (Table 2), we were careful to mix boys and girls of different academic abilities, according to what they had produced in their monologues (except for Group 5, which is a convenience group). We also paid attention to the potential problems associated with group dynamics (different student attitudes in discussions, gender aspects): the groups were expressively encouraged to be inclusive and open in their discussions.

Figure 1. Diagram of the unit on slavery focusing on 12 Years a Slave (Source: Authors)

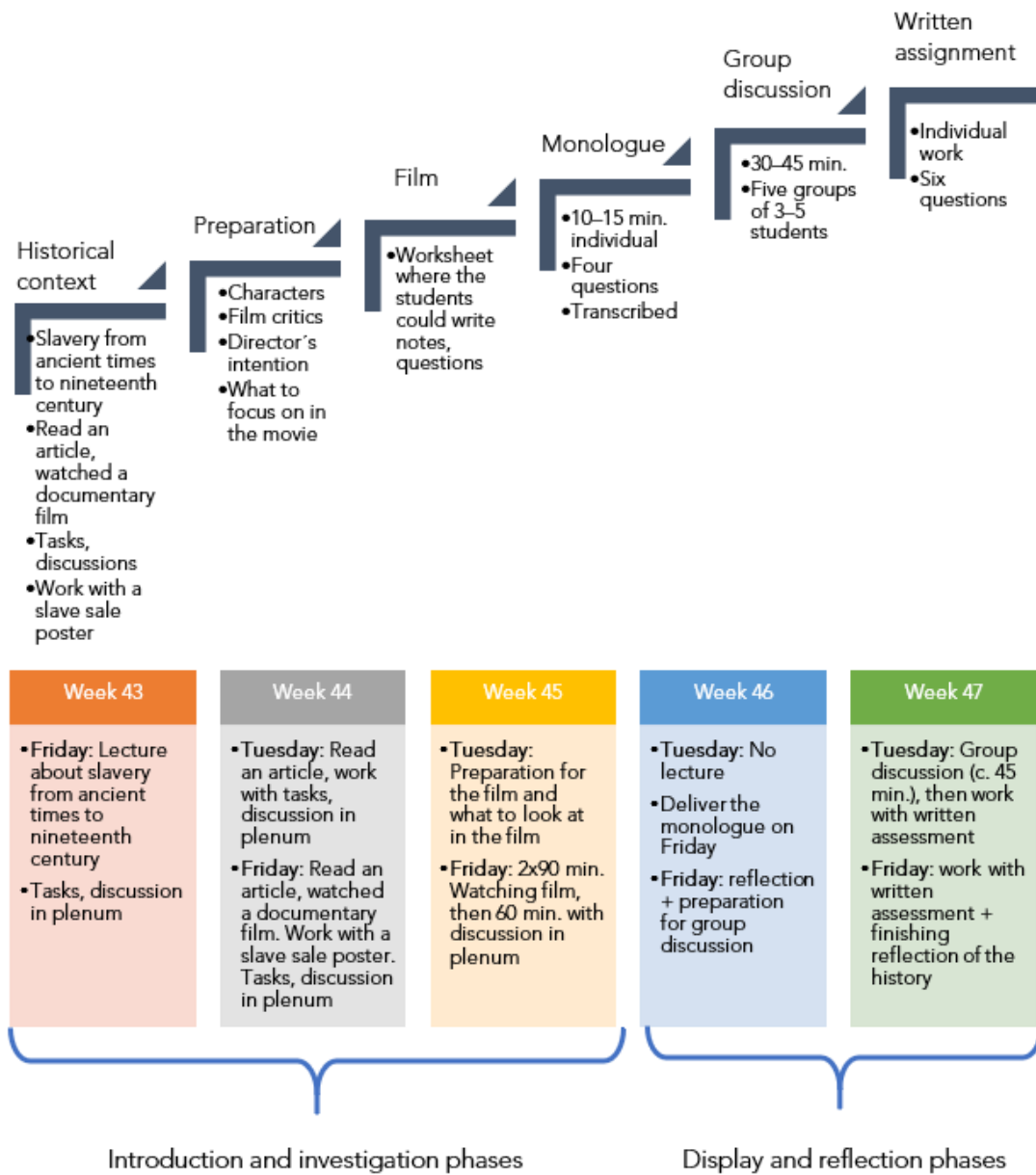


Table 2. Composition of Groups 1-5 (Source: Authors)

Group 1	Noah, Oline, Simon, Andrine, Kristian
Group 2	Astrid, Elise, Diana, Steinar, Aurora, Niklas
Group 3	Ella, Ellen, Emilie, Geir, Irene
Group 4	Anne, Rune, Elisabeth, Nathaniel, Robin
Group 5	Nils, Erik, Magnus

The unit consisted of nine double lessons (90 minutes) over five weeks. The film was shown in its entirety in a cinema room, to gain the students' full attention and to ensure full immersion.

Following Brooks (2008), Monte-Sano and De La Paz (2012) and De Leur et al. (2017), we paid attention to the way students were asked to express their historical understanding (Table 3). We are aware that when asked to perform first-person tasks ('Imagine you are ...'), students may display more presentism and moral judgements than in third-person tasks ('Explain how or why people in the past ...') or when such imaginative positioning is not explicitly specified. Despite this, we mixed questions focusing on sourcing and document analysis with more personal questions using the classic 'Imagine you were ...' in order to see if they would fall into present-oriented judgements or use contextual knowledge. Following Monte-Sano (2011), we reiterated the prompts that focused on the perspectives of the people in the past, in order to reveal the historical understanding of each student and its evolution throughout the unit.

Table 3. Questions asked to the students (Source: Authors)

Monologue
M1. How are different characters presented in the film? Discuss and explain how different perspectives are conveyed.
M2. Which character(s) impressed you the most? Why?
M3. Explain and discuss how slavery as a system is shown in the film. Use examples.
M4. What are your thoughts about slavery in the nineteenth-century USA? Justify your answer.
Group discussion
G1. Which scenes impressed you the most? Why these scenes? Justify your answer.
G2. What image of slavery is given in <i>12 Years a Slave</i> ?
G3. What are your thoughts about slavery in the nineteenth century? Discuss causes and motives, and take a stand.
G4. What would you have done if you were Solomon Northup's slave owner? Discuss your answers.
G5. Discuss the agency of slaves and slave owners in the following scenes: A. After a quarrel with John Tibbeats, Solomon is severely punished. B. On the slave market, Mr Ford purchases Solomon and Eliza, and Eliza is separated from her children. What alternatives/agency had the slaves and Mr Ford then?
Final written assignment
W1. Imagine you were Solomon. What would you do in his situation? Justify your answer.
W2. Imagine you were Freeman, the slave merchant. What would you do? Justify your answer.
W3. How do you understand slavery? Has your understanding changed after this unit with <i>12 Years a Slave</i> ?
W4. Which character in the film do you think you would have been? Who do you identify yourself with? Justify your answer.
W5. What did you learn most from during this lesson unit? Reflect upon your own evolution and the unit as a whole.
W6. Do you have any other comment you want to share about this lesson unit?

Reliability and validity

This study is a qualitative investigation performed on one of the researchers' own classes. This positionality has its strengths and weaknesses. On the one hand, the research was well integrated in the class course and benefited from the prior knowledge of the researcher and the relationship with the students. The assignments (monologue, group discussion and final individual assessment) were assessed with an individual grade at the end of the unit. The questions asked and the overall purpose of the unit (to recognise different perspectives and be able to contextualise their understanding of slavery) were clearly explained to the students. These conditions warrant a certain reliability of the collected data.

On the other hand, this positionality may obviously have some influence on the interpretation of the collected data. To overcome this potential bias, a parallel analysis of the data was performed by a co-researcher. Afterwards, both researchers discussed their respective findings on the same questions.

As this study is carried out on a limited number of participants (N = 24), our findings are not representative or generalisable, but we hope that the range of reactions and competencies demonstrated by the students is representative of the range present in regular 13th grade classes of the general curriculum in Norway.

Data analysis

We analysed the students' historical understanding of slavery and their historical empathy through the transcriptions of their recorded monologues and group discussions, together with the final written assignments they submitted at the end of the unit. All answers were compared and analysed according to the set questions, to ensure a phenomenological hermeneutical approach (Thagaard, 1998). We used NVivo12 to analyse the content of the data, in addition to personal notes, following a constant comparative framework (Miles et al., 2013) and using a directed content analysis (Hsieh and Shannon, 2005). We established a primary list of coding categories based on the thematic questions in which we were interested. We then refined our categories within the course of analysis, comparing each interview systematically within the same categories. We assessed each student's level of historical empathy by combining the categories defined by Ashby and Lee (1987) and Barton and Levstik (2009) in different levels.

Furthermore, we detailed each student's use of present-oriented perspectives and historical context knowledge following Huijgen et al. (2019b): the use of presentism is characterised as judging the past based on one's own beliefs, values or knowledge, taking no consideration of the contextual circumstances at the time of the historical event. In contrast, using historical context knowledge corresponds to using chronological, spatial, sociopolitical, socio-economic and/or sociocultural context knowledge, while considering the circumstances at the time of the historical event. We performed these analyses for each task undertaken: the monologue, the group discussion and their final written assignment, in order to assess the conclusive progress and produce a profile for each student.

Another objective of this article is to illustrate our findings through examples drawn from the students' answers – their 'voices'. They were naturally very varied, and we tried to select representative quotations, which we translated from Norwegian.

We complied with the formal ethical rules of confidentiality and personal data protection stipulated by the Norwegian Social Science Data Services (NSD). All participants gave their consent and have been anonymised for the purpose of the analysis.

Findings

For the purpose of this article, the collected data were analysed in order to answer two main questions:

1. How did the students experience the unit?
2. What did they learn about the history of slavery through the unit?

How was the students' experience of the unit?

The lesson was (very) well received by the students. They felt that they had learned a lot and that the unit was motivating and interesting, mainly because the activities were varied (unlike what they called 'traditional teaching') and easy to follow. Most students expressed that they learned most from the film, combined with the assignments and the group discussion. Although they did not always understand why some questions seemed alike, from the monologue to the final written assignment (in order to examine the evolution of their understanding through the whole unit), they generally valued the performative nature of the unit. For example, Anne said:

I learned less when it was the usual lesson, with PowerPoint. It gave me some background information, but everything seems more dull when you just sit and listen. And maybe because I knew we were going to watch a movie, so everything before that seemed unimportant.

Interestingly, some students expressed that the combination of film/group discussion/assignments brought them closer to the topic and gave them a greater sense of historical proximity, which facilitated a more nuanced historical understanding:

I definitely learned more about perspectives through first watching the film and then working with assignments than I would have through usual teaching. Under a usual unit, I would have learned historical facts and how slavery as a system was organised, about different consequences, why they did that et cetera. Yet, I would not have had the same understanding

of why they did stuff, and I would not have had as much sympathy for the slaves. This kind of teaching helped me to see the humane side of this history, instead of just cold facts. I've been able to see history from both sides and to understand the ins and outs, whether I agree or not. I think, that this will be especially useful when we study the World Wars. (Nils)

In addition, some students noted how the dialogic dimension of the activities facilitated the development of their content-knowledge and of their own reflections; the alternation between individual assignments and group discussions seemed particularly fruitful:

I think this unit has been good. It was not just one method with boring assignments. The articles, the PowerPoint, the assignments, the group discussion, plus the movie, made it easier for me to follow without getting bored. In addition, I learned a lot. . . . We had the opportunity to think by ourselves and in groups. It opens, not only your own opinions and perspectives, but also to others'. And I think it was good to have assignments where we had to put ourselves in the situations of that time. We had to see things through the perspective of nineteenth-century Black and White people. (Nathaniel)

Our observations of the class confirm that feeling: the students have been notably more engaged, motivated and interested during the unit than usually. The film worked as a cornerstone of the unit: it was compelling, and everyone had opinions about its content. Consequently, the monologue forced the students to think for themselves, and the group discussion made them confront their thoughts, while the final written assignment gave them the opportunity to reconsider their own judgement.

What did they learn?

A common trend was that all students were struck by the brutality of slavery, which was represented in the film in its practical and day-to-day dimensions – a characteristic for which the film has been criticised, and seen as belonging to the 'torture porn genre' (White, 2013). This crude *parti pris* of the film resulted in a feeling of authenticity, and in emotional reactions of various strengths among the students. The students felt that they achieved a richer and deeper understanding of slavery through the emotional resonance the film elicited. This was reflected by all students, showing that they, at least, 'cared about' and 'cared that', in the sense defined by Barton and Levstik (2009) (see Figure 3).

The students generally understood that the film showed slavery from different perspectives: mainly through the eyes of Solomon Northup and other Black slaves, especially women (through the characters of Eliza and Patsey), but also through the perspective of various White men: Mr Ford, as the 'good/decent' slave owner; Edwin Epps, as the 'bad' slave owner; Bass, as the White carpenter, against slavery, who helps Solomon to recover freedom; and other White characters working in the plantations. It contributed to shaping a more nuanced image of the White people, and especially of the slave owners, but only some students managed to convert these different perspectives to a higher level, as a representation of the competing conceptions about slavery at play in American society at the time.

The following examples illustrate these nuances, and students' understanding of the different perspectives:

I think the different characters represent the society or, more precisely, people's thoughts about slavery at that time. (Kristian)

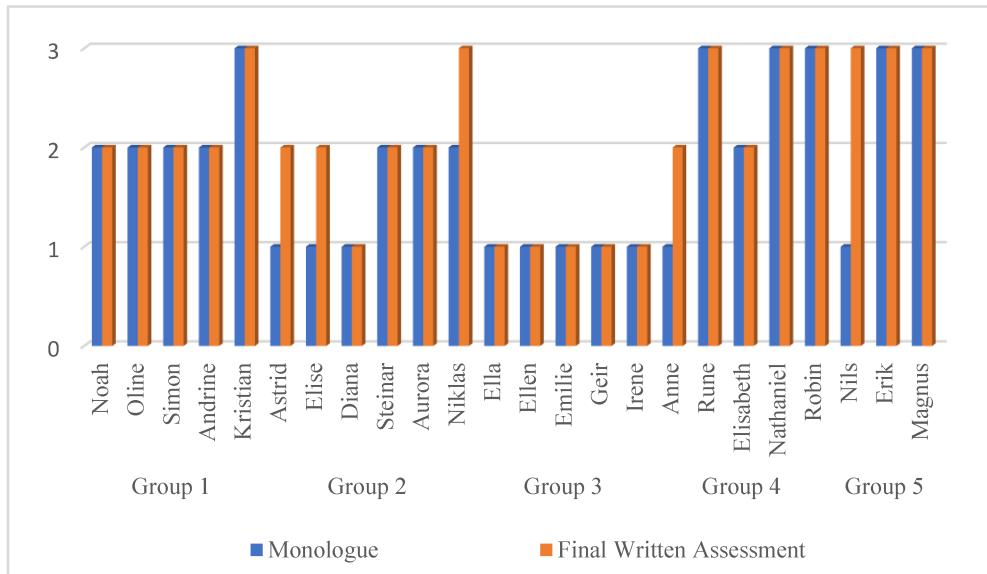
And there is much difference between slave owners too: some of them are much harsher with their workers than others. It varies from respecting the slaves, and most of them don't, but there are many Whites, not all of them dislike the Blacks. (Oline)

We also see the slaves' perspective: they felt . . . it was horrific! . . . But also those who grew up as slaves and thought: 'That's the way it is, we . . . we just have to live like this and accept it.' (Andrine)

To measure the level of perspective recognition and the level of care achieved by the students in their monologue and in their final written assignment, we used the categories defined by Ashby and Lee (1987) and Barton and Levstik (2009) (Figures 2 and 3).

Figure 2. Perspective recognition levels and students' capacity to contextualise (Source: Authors)

Level 1 combines the stages 'Divergent past' and 'Generalised stereotypes' from Ashby and Lee (1987) and/or 'Sense of otherness' and 'Shared normalcy' from Barton and Levstik (2009). Level 2 encompasses Ashby and Lee's 'Everyday empathy' and 'Restricted historical empathy'; Level 3 corresponds to Ashby and Lee's 'Contextual historical empathy' and a thorough 'Historical contextualisation' and/or 'Multiplicity of perspectives' and 'Contextualisation of the present' from Barton and Levstik.



In general, all students succeeded in calling upon contextual elements in their understanding of slavery, but at more or less exhaustive and elaborated levels. Chronological considerations were very scarcely mentioned: only a couple of students argued that this period was special in American history or made a comparison with antiquity to underline that slaves were more common then and not only reserved for rich people.

However, it seems that students' level of emotional engagement was negatively related to their ability to contextualise. In the case of students at Level 1 after the monologue, it appears clearly that their emotional engagement was very high and might have restrained their ability to contextualise and process perspective recognition on a more cognitive basis.

Students at Level 1 named the difference between North and South, as political and spatial aspects about the way in which Black people were treated. They might refer to a few basic socio-economic elements: that slaves were considered as property goods with no rights, and traded like animals. Regarding sociocultural aspects, they generally mentioned that slavery was seen as normal, but they did not give any further explanation. As to the socio-psychological setting, they strongly emphasised the physical and sexual violence and the abuse to which slaves were subjected, resonant with their high emotional engagement, which was elicited by the suffering and injustice experienced by the slaves in the film:

The film shows slavery very well, in a way, because it shows horrible things and how slaves were treated; how little respect they got and how White people misused their power, just because they were White and not coloured. . . . It showed how slavery was a system: in a way, if you were rich and White, you had slaves, like it or not, because it was the norm. (Elise)

I think nineteenth-century slavery was awful. I can't even imagine what it was like, because it's so inhumane to treat slaves – human beings – like this. Even though it was normal at that time in the South, I don't understand they did not see it was wrong: because it's ingrained in human nature to feel that one shouldn't treat individuals that way, no matter what. So, I just feel like what they did and treating them like belongings was dreadful. (Ellen)

Students at Level 2 demonstrated a good and nuanced interpretation of slavery, calling upon more contextual aspects. However, they did not grasp a full sense of the social and economic contexts of slavery as a system, with its cultural implications and differences in mindsets:

It was normal for people to buy and sell slaves then. Especially after Atlantic trade became prohibited, they turned to domestic slave trade and it could be more profitable than tobacco or cotton. . . . It was considered normal, but a part of the population was against it, which partly caused the Secession War, between Northern and Southern states. The Southern states needed slaves for their tobacco and cotton plantations, while Northern states supported the abolition. . . . Even after the abolition and the end of the war in 1865, the freed slaves – coloured people – were treated badly. For example, in the 1950s, the segregation was still pretty strong in the USA. And we still see remains of that in racism against Black people today. But in the nineteenth century, people were used to slave auctions and posters and owning slaves if you had a big farm. And they were not always as fair as Mr Ford – he treated them well, while Mr Epps was brutal. There were different types of slave owners, as shown like opposites in the film. (Steinar)

Students who reached Level 3 stressed that slavery was contested at the time, and that many differences existed between states. They also acknowledged that laws prohibiting the Atlantic trade of slaves were ratified, and that slavery could be a source of moral and religious contradictions. They grasped that these contradictions were overshadowed by economic motives, related to the Industrial Revolution and intertwined in a complex and organised system of transport, trade, low-cost workforce, profitability and debt in the economic model of many Southern states. They also recognised that there could be sizeable differences between farmers, and that White workers, although treated differently, could be assigned to the same tasks as Black slaves in the plantations. Regarding the socio-psychological context, they discerned that violence could be interpreted as a means of control to discipline the slaves' bodies and dominate their minds in order to prevent any risk of rebellion. Finally, they understood that an entire cultural framework could be drawn upon to justify slavery legally and morally as a normative and a standard practice that was difficult to resist and avoid at that time.

Interestingly, all students showed some awareness of the agency of people in the past, that is, of the limits of their (historical) condition, through the examples of the film's characters. Thus, they all admitted that they would probably not have done better than Solomon in his place, and that he was at the mercy of the conditions to which he was subjected. Regarding the slave merchant, Freeman, even the most emotionally engaged students acknowledged that his occupation, in its historical context, was accepted and 'normal'. However, students at Levels 1 and 2 of contextualisation protested that, in his place, they would never have separated Eliza from her children, or that they would have treated their slaves with at least a minimum of respect. This illustrates that, due to their inability to disassociate from their contemporary moral values, they struggled to grasp the figured world (Gee, 2014) of people such as this slave merchant in depth. As a result, they mostly identified with the character Samuel Bass, because he held values closer to those of our time and had a positive role in Solomon's liberation. If not with Bass, they identified with Mr Ford, who represented a more 'humane' and 'acceptable' slave owner. By contrast, students at Level 3 acknowledged that they would probably have held the values of that time, as shown in this group discussion:

Magnus: If you were a slave owner, do you think you would have seen things differently?
Erik: I think I would have been just like them. I would have exploited the slaves as much as possible and not given them too much – it costs money!
Nils: If you had a choice: be good to the slaves or be harsh and make more money?
Erik: I think most people would have chosen the money.
Magnus: I hope I would have been like Jefferson, who owned slaves but freed them when he could afford it. That cost him, but many were freed.
Erik: I hope I would have been like this, but I don't think so.

From Figure 2, we also discern a general qualitative progression of the students' capacity to contextualise, over the course of the unit. From the monologue to the final written assignment, the distribution of the number of students at Levels 1–2–3 evolved from 10–8–6 to 6–10–8. Every student progressed; even when they remained at the same level, they made some progress within the level.

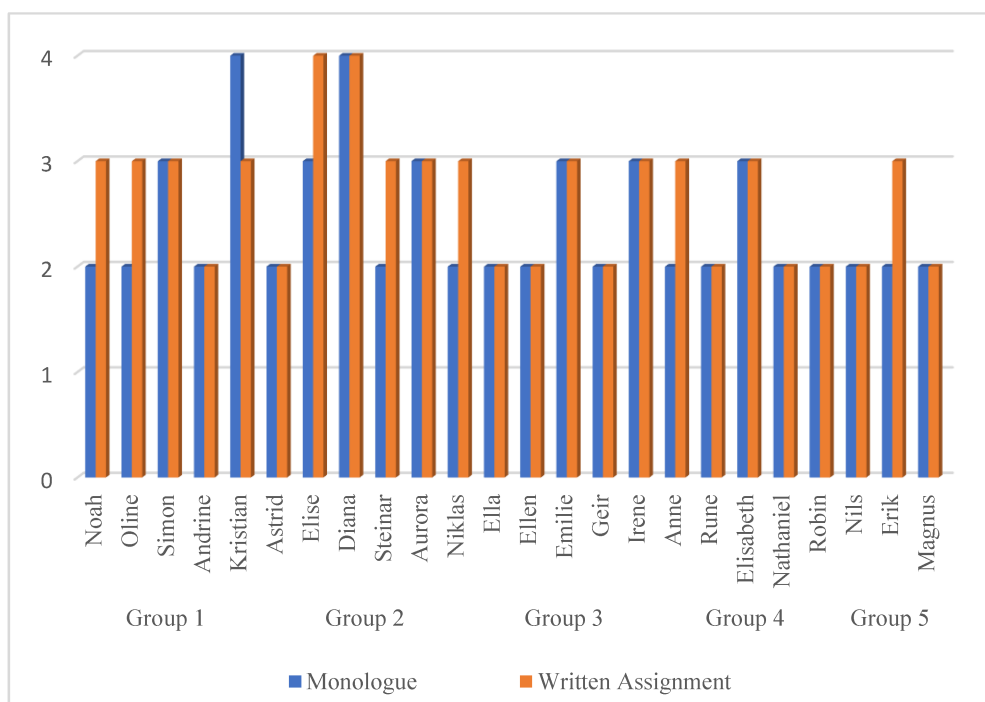
The group dynamics seem to have played an important role in this evolution. The students who demonstrated the highest level of contextualisation usually positively influenced the other members of their discussion group. This was all the more apparent when these students achieved the lowest level in their monologue: that is the case for Astrid and Elise in Group 2 with Niklas, for Anne in Group 4, and Nils in Group 5. By contrast, in Group 3, where no one had achieved more than Level 1 following the monologue, the group discussion focused mainly on discussing how awful the abuse and prejudice against the slaves in the film were. The whole group subsequently remained at Level 1 of contextualisation. It is therefore evidential that nobody in Group 3 highlighted group discussion as one of the activities they especially learned from.

Figure 2 shows a notable difference between boys' and girls' performance in achieving a high level of contextualisation after the final individual written assessment. Out of 12 boys, one, three and eight achieved Levels 1, 2 and 3 respectively, while five girls were at Level 1, seven at Level 2 and none at Level 3. This difference is interesting, because it was not congruent with their usual achievements in class. This is discussed further below.

With regard to the levels of care reached by the students, Figure 3 shows that they all demonstrated to at least 'care about' and 'care that', which in itself is positive. However, although we can note a general positive evolution throughout the unit, we could not establish a 'discussion group effect' or a connection between the expressed levels of care and the demonstrated levels of contextualisation, nor any obvious difference between boys and girls. As mentioned above, it is rather the intensity of emotional engagement and not its nature that is related to students' ability to contextualise.

Figure 3. Students' historical empathy as 'care' (Source: Authors)

We considered respectively as Level 1–4 the expressed manifestations of caring 'about' (1), 'that' (2), 'for' (3) and 'to' (4), according to Barton and Levstik (2009).



Discussion and conclusion

Our findings confirm the potential of film as a tool to enhance historical empathy. As a vivid and highly immersive representation of the past, the use of *12 Years a Slave* stimulated the students' interest and investment, and consequently their in-depth learning and understanding of this part of the history of slavery.

Our study demonstrates that interweaving learning and emotion can produce excellent results, especially when the screening is well prepared and combined with meaningful activities. As a result, students valued and managed to complete demanding analytical tasks, and developed an ability to contextualise, even though they performed these tasks with varying success.

We also found that the categories defined by Ashby and Lee (1987) and Barton and Levstik (2009) were appropriate, although the latter have obviously benefited from the seminal work of the former, and thus appear more nuanced and refined. Although we agree with VanSledright (2001) that students' ability to contextualise might simultaneously be attributed to different levels of perspective recognition, these categories functioned well, especially when fused to just three different levels.

Students' historical understanding of slavery became better and more concrete over the course of the unit: they saw slavery at a micro level, through the perspective of different characters, rather than through figures and features at a macro level, as more traditionally presented in textbooks. This aligns with what Rantala et al. (2016: 339) observed with Finnish high-school students involved in role play about villagers of different social statuses during the Finnish Civil War of 1918.

In addition, the dialogic nature of the unit's activities seems to have been particularly productive and appreciated by the students. In particular, the dynamics of the group discussions seem to have played a decisive role in the evolution of each student's capacity to contextualise their understanding of people in the past. Thus, our study accredits and confirms the positive effect of group discussions (Kohlmeier, 2006) and, more generally, of class activities towards more dialogic practices (Lefstein and Snell, 2013; Mercer et al., 2017).

Moreover, the disparity we uncovered between boys' and girls' ability to contextualise is both interesting and surprising, because it goes against the usual trend in Norwegian schools – girls perform better than boys on average (NOU, 2019) – and the usual results in this particular class, where as many girls as boys used to achieve the highest grades.

This finding needs further exploration in other studies; if confirmed, it could be an interesting contribution to this matter. Since girls usually performed better than boys in this class, we can assume different explanations in this case: the new activities implied new tasks and new 'codes of performance' that girls mastered less well than usual and may have misunderstood. Boys might also have been more motivated and implicated, because the activities appeared more exciting and meaningful than usual. This would indicate that when set in conditions where they are motivated enough, boys can perform as well as girls.

Still, the 'novelty' factor cannot fully explain why girls performed less well than boys: they should have performed similarly. The difference could be related to the fact that girls more generally adopted an overwhelming 'caring' position, which may have restricted their ability to contextualise, suggesting that a high emotional engagement tends to hinder the ability to consider a situation from a larger or more abstract context, rather than at a micro level. This is consistent with the findings of Metzger (2012). This would also confirm that films, especially those that are compelling and denote a *difficult history*, such as *12 Years a Slave*, can be more likely to create cases of 'historical tension', that is, situations where students have more difficulty contextualising and explaining a historical event because of present-oriented perspectives (Huijgen et al., 2019b). In other words, the emotional power of the film familiarises the setting, but also tends to increase the students' 'contextual blindness'.

On the other hand, if too much emotional engagement limits students' capacity to contextualise, one may lessen their capacity to 'care'. One can hardly wish for that, given that a high level of 'care' is considered an essential quality to create a more humane and better society. Besides, it will prove difficult and undesirable to students' emotions and sensibility, since care fuels their interest and increases the memorability of what they learn.

More generally, our findings also confirm that contextualising is a difficult task, which needs to be guided and scaffolded by the teacher. Such necessity is well known, as Wineburg (2001) characterised this part of historical thinking as an 'unnatural act', which can be targeted and addressed by following a framework to teach contextualisation (Endacott and Brooks, 2013; Huijgen et al., 2019a). In fact, some of the limitations of our study may reside in the fact that we could have further accentuated the different contextual elements that we wanted them to grasp, by closely linking the issue of slavery to current affairs, or by offering them a concluding discussion concerning what they had learned and what they should have learned.

Therefore, the teacher's task should involve helping students reach a high level of contextualisation alongside endorsing strong emotional engagement, that is, teaching them how to perceive, cultivate

and, particularly, alternate understanding from care to perspective recognition without sacrificing either one. In this regard, film is a special gateway to reaching historical empathy.

This task might prove demanding, but it represents an exciting challenge for teachers. It is a task that will reinforce the meaning and impact of their work. In addition, by using film’s narrative and characters as examples, teachers will also have the opportunity to push students’ reflections further – for example, by addressing the issue of their own empowerment and historical agency in the world today.

Table 4. Detailed description of the lesson unit on slavery, using *12 Years a Slave* (McQueen, 2013) (Source: Authors)

Instructional activity	Instructional purpose	Historical empathy purpose
PART 1: BEFORE THE FILM		
Lecture– Slavery from antiquity to nineteenth century	Lay the foundation for an understanding of slavery in the USA, and show continuity and changes in the history of slavery.	Historical context/Perspective recognition: Knowledge about slavery from antiquity to the nineteenth century. Students will gain knowledge about a reality far beyond their own.
Problem solving about the Europeans’ growth and America	Reflect upon and see connections between different time periods.	Historical context: Lay the foundation for an understanding that slavery is connected to previous events in history. Students will work with different perspectives, from the Indigenous people to Columbus and the European migrants.
Read the article ‘Slavery og demokrati i USA’ and answer questions.	Develop a deeper understanding of the system that legitimised slavery in the USA.	Historical context: Gain knowledge about laws and rules that legalised and legitimised slavery, and how the slave trade changed. Understand that there were differing perspectives. Recognise slave owners’ views and reasoning about slavery. Affective connections: Reflect upon people’s feelings about slavery, and their search for power and wealth.
Reflect upon two quotations, from Jefferson and Lincoln	Encourage students to reflect upon the role of slavery in American society, seen from two presidential quotations.	Historical context: Knowledge about two US presidents, and their perspectives in their context. Affective connections: Think about how slavery was even legalised by presidents, and connect this to their thoughts and feelings about slavery.
Watch excerpt from the documentary <i>Les routes de l’esclavage</i> [Slavery Routes – Slavery’s New Frontiers] (Cattier et al., 2018)	The chosen clips from the documentary contain audio recording of a freed slave, an explanation of the system in past and present. Different perspectives were shown and explained.	Historical context: Understand the workings and consequences of the Atlantic trade. Discover different perspectives, from freed slaves’ own words to reasons for slave owners’ actions. Affective connections: Confront the emotions bound up with the violence against slaves (for example, a woman slave who was raped), and the social injustice of slavery.
Problem solving about the American Civil War	Develop an understanding of how slavery affected the USA’s political governance, and what consequences it had.	Historical context: Learn about the origins of the American Civil War, who fought, and how it ended. Examine the two views on slavery in the USA in the nineteenth century that divided the Northern and Southern states.
Tasks about a slave sale poster	Use a primary source to reflect upon slavery as a system. Challenge students to find out what they think themselves.	Historical context: Examine the difference (in time and context) between nineteenth-century America and today’s USA. Discuss people’s perspectives and reactions to the advert in 1829. Affective connections: Face racial and humiliating behaviour towards Black people. Contemplate their own reactions about the slave sale poster.
Discussion and reflection upon history films as cultural representations	Engage students to reflect upon the specificity of historical films as representations, upon the emotional mechanisms attached to watching a film, and upon McQueen’s intent and role as a director.	Historical context: Understand that film has potential pitfalls and advantages when it comes to drawing historical context and perspectives. Affective connections: Reflect upon what a film can do in terms of emotional response.

Table 4. Cont.

Instructional activity	Instructional purpose	Historical empathy purpose
PART 2: THE FILM		
Watch the film <i>12 Years a Slave</i> (with preparation tasks for the film)	Engage students with the film and encourage them to focus on different perspectives about slavery, and how it is presented as a system and an experience.	Historical context: Students will find different incidents that show slavery to be a system. Different perspectives are presented, among both the Black and the White population. Students must try to understand the characters' actions and thoughts. Affective connections: Through explicitly violent scenes, students must face racism and slavery as a system and react to injustice.
PART 3: AFTER THE FILM		
Monologue (first assignment)	Challenge students to use the film as a way to see different perspectives in the film, and to take a stand about their own feelings.	Historical context: Use content-knowledge to explain slavery in its context. Through examples, show different perspectives on slavery and discuss how they are presented in the film. Affective connections: Some tasks target students' emotional reactions and understanding of slavery. They must take a stand about how they feel about slavery in the nineteenth century.
Group discussion	The students will use their work on the monologue to build on, and possibly change, their understanding of slavery. The students will contemplate slavery through discussion and conversation. Encourage students to challenge each other about how slavery is presented in <i>12 Years a Slave</i> .	Historical context: Students must consider how <i>12 Years a Slave</i> portrays slavery, in the light of their own knowledge. Examine and discuss what opportunities/alternatives people had. Affective connections: Challenge students to discuss issues of responsibility, power relations, injustice and racism, in the light of scenes that evoked an emotional response.
Written assignment	Challenge students to present their understanding of slavery after the group discussion. Encourage them to see the system from different perspectives.	Historical context: Reflect upon historical agency and context. Affective connections: Students must reflect upon their understanding of slavery and the difficult situations people were in.

Declarations and conflicts of interest

Research ethics statement

The authors declare that research ethics approval for this article was provided by the Norwegian Centre for Research Data (NSD) ethics board.

Consent for publication statement

The authors declare that research participants' informed consent to publication of findings – including photos, videos and any personal or identifiable information – was secured prior to publication.

Conflicts of interest statement

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

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