Haian Xue

On Design and Nostalgia

From the Perspectives of
Culture, Experience and Design Strategy

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Doctoral Dissertation

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Contents

Part I – The Fundamentals

Chapter 3 – Designing for Nostalgic Experience

Part II – Nostalgia-driven Design Strategy

Abstract

This dissertation takes a dynamic, forward-looking and experiential perspective to examine the multifaceted relationship between design and nostalgia for two purposes: 1) to serve as a ground-clearing work for analytical discussions about nostalgia in the design field, and 2) to study the viability of nostalgia-driven design as a strategy for brand revitalisation. The investigation is developed from three design-related angles: 1) nostalgia as a sociocultural phenomenon, 2) as a subjective experience, and 3) as the basis of a design strategy.

As the existing definitions are unsatisfactory, the dissertation redefines nostalgia as the combination of emotional reactions engendered by the recall of nostalgic memory, based on the differentiation between remembered and immediate experience. To define the scope of nostalgia, it proposes a new typology in which different types of nostalgia and similar experiences are not seen as isolated entities, but form a spectrum with blurred boundaries. Moreover, it is argued that individuality and collectiveness are two essential attributes co-existing interdependently in nostalgic experience, rather than two opposing types of nostalgia as the previous literature suggests.

The first research strand examines nostalgia (wave) as a design-related sociocultural phenomenon. Drawn from multidisciplinary literature and cross-cultural observations, it establishes a dialectical relationship between (radical and rapid) changes, the increasing collective need for nostalgia, and creative nostalgia-driven design efforts. Through examining cross-cultural design cases, it critiques the outdated view of considering nostalgia merely backward looking, which prevents active design explorations on this topic. It further suggests that the design field should re-understand nostalgia as a balancing or coping mechanism, and actively explore its positive potential in both social and market design contexts.

The second research strand examines nostalgia as a subjective experience. It proposes a heuristic model explaining the underlying process of design-evoked nostalgic experience. This model emphasises the mediating role of nostalgic memory

retrieval in nostalgic experience, and suggests that the design outcomes of nostalgia-driven design should be seen as mementos of nostalgic memory. Through deductive reasoning, cases, and a design experiment, it challenges the common equation of retro (appearance) design with nostalgic (experience) design, and elaborates the great potential of unexplored non-visual sensory modalities and both operational and social interactions in designing for nostalgic experience.

Viewing nostalgia as the basis of a design strategy, the third research strand investigates how nostalgia-driven design has been deployed for 'phoenix brand' revitalisation, through a single case (i.e. Sarvis) and multiple-case studies (i.e. Forever, Jopo, TDK) within a constructivist paradigm. Multiple data sources are used, the most important of which are interviews with collectors, non-collectors and designers. Firstly, the single case study reveals the underlying process of nostalgic bond formation and change in perceived brand value, and also initially identifies four characteristics of a potential phoenix brand. Secondly, the multiple-case study not only facilitates the generalisation of the four characteristics, but more importantly it also identifies crafting an aura of authenticity to be the latent key to successful revitalisations. Accordingly, it develops a systematic analysis on how authenticity may be crafted synergistically in design, production and communication terms.

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Introduction

Memory Issues in Design:
A Broader View

Human memory is mysterious and intriguing. It is generally believed that memory is one of the most important factors that define who we are, where we came from and where we might go in the future. As general interest in memory has rapidly grown, the interdisciplinary research field of *Memory Studies* and its related journals have been established in recent years. Neuroscientists, psychologists, sociologists, archaeologists and cultural researchers have all investigated the connections between their fields and the concept of memory. To date, memory studies have not involved any significant design research, even though intersections between design practice and memory are well established. For example, from a design culture perspective, the personal and collective memories associated with designed artefacts form an integral part of material culture and determine what kinds of relationships might be established between people and objects. In addition, consumers or users often bring their memories to bear upon the tasks at hand, such as when interpreting advertising, evaluating products or brands, making purchase decisions or finding out how to use products. Therefore, memory could be viewed as a valuable topic for design research. However, as revealed by the search of relevant design literature, the current knowledge gap between design research and memory studies is wide. *Design and Memory* is almost untapped by design researchers. With my background in design and strong interest in human memory, especially its capacity to provide a sense of meaning in life and influence experiences, emotions, preferences and value perceptions, I became keen to find out which intersections between design and memory might be worth exploring.

Why Study Nostalgia?

What specific research focus should I explore in the area of design and memory? And why? These were two questions I had to answer before starting my doctoral research. The topic should be closely related to both the knowledge domains of

design and memory, useful and informative for designers, but not yet comprehensively studied in design research terms, and attractive enough for me to devote years of my life to. Looking back, it is rather obvious why I chose nostalgia.

A Multidisciplinary Intersection

First of all, I strongly suspected that nostalgia represents one of the most important intersections between the knowledge bodies of four established research fields: *Design*, *Memory*, *Culture* and *Emotion*. It is clear that design and memory studies both have established links with emotion (i.e. Designing for Experience; Emotional Memory) and culture (i.e. Design Culture; Collective/Cultural Memory). When discussing nostalgia in a contemporary context, the concept can be seen as a memory-based subjective experience (or emotion) that almost everyone will experience at some point, as well as a pervasive collective longing of a generational cohort for a bygone recent past. It may plumb the deepest recesses of an individual's heart, or influence large numbers of people across a society, and exist as an integrated part of a local or global culture.

A Contradictory Design Issue

Nostalgia, as a sociocultural phenomenon or a subjective experience, has never been a stranger to designers. Design outcomes (e.g. physical artefacts, brands and services) that are intended to evoke nostalgic experience are everywhere. For example, *Philips Original Radio* is a stereo with an iPod/iPhone dock, launched in 2012 and designed based on the company's legendary *Philetta 254* from 1955. Facebook's new service feature, *On This Day,* shows one's personally generated contents on Facebook (e.g. status updates, photos, videos) from the same date in the past. The contemporary designers' attempts to evoke nostalgic experience were evident, though some successfully achieved the experience goal (even without any retro appearance) while some failed (even with old visual styles).

Surprisingly, in the literature review I found that little design research has investigated nostalgic experience as a contemporary design issue, which was the opposite of my expectation. This may be partly attributable to a negative view that some members of the design profession have held about nostalgia, considering it over-sentimental, backward looking, and largely incompatible with the modernist ethos. Such rejection, however, contradicts the reality that nostalgia as an experience is so desired and enjoyed by people nowadays that nostalgic cultural offerings are very popular. I always believe that one is more likely to find treasure when studying a contradictory issue than a widely agreed one. Therefore, finding out this contradiction in nostalgia as a design issue made me more interested in this topic, although it is apparently challenging or even risky.

An Ill-defined Concept in Existing Design Literature

The term 'nostalgia' does appear in a couple of design historians' (e.g. Woodham, 1997) and design culture scholars' (e.g. Guffey, 2006) works. However, the concept of nostalgia is ill-defined in existing design literature, which is problematic for further academic discussions, especially when examining it as a design-related experience. For example, Woodham (1997) talks about nostalgia as an explanation for the phenomenon characterised by the rise of the heritage industry (e.g. museums) and the collective 'longing' for objects associated with the past. But how far back should one go into the past? I, as a Chinese born in the 1980s, feel a special affection for Chinese Ming Dynasty (1368-1644) style furniture, and there are a large number of people who also share the same feelings. Is this affection for antique furniture nostalgia? How is it different from the positive experience that I would feel when encountering those simple small wooden chairs that my family and many other Chinese families used to have in the 1980s and 1990s?

In her book *Retro: The Culture of Revival*, Guffey (2006) briefly discusses nostalgia from the perspective of design culture. However, this discussion of nostalgia is intended to illustrate the new revivalism, which was the focus of the book, and again a well-constructed and up-to-date definition of nostalgia is missing in her work. In this sense, nostalgia has almost never been studied as a well-defined concept in a design research context.

In addition, new general knowledge on nostalgia has been growing quickly in the fields of psychology and sociology, which has encouraged researchers to rethink and re-evaluate this subjective experience or sociocultural phenomenon. For instance, recent psychological studies have identified nostalgia as a wellbeing emotion that serves four significant psychological functions in our daily lives: elevating positive mood, boosting self-esteem, strengthening social connectedness and increasing a sense of meaning in life (Routledge, Arndt, Sedikides, & Wildschut, 2008; Routledge et al., 2011; Routledge, Wildschut, Sedikides, & Juhl, 2013; Routledge, Wildschut, Sedikides, Juhl, & Arndt, 2012; Sedikides, Wildschut, & Baden, 2004; Wildschut, Sedikides, Arndt, & Routledge, 2006). Meanwhile, collective nostalgia is suggested to be a societal balance reacquiring mechanism that typically works sometime after radical changes in the society (Davis, 1977, 1979). Therefore, to study nostalgia from a design perspective would update design researchers' understanding of this concept in the contemporary context, and hopefully encourage designers to explore new relevant design opportunities for both commercial success and social good.

A Forward-looking Topic

Many believe that nostalgia is a backward looking and conservative topic, but I actually see it as essentially forward-looking. *Inspired Minds Careers 2030* is an initia-

tive of *The Canadian Scholarship Trust Foundation* (CST) in 2014 intended to 'help guide Canada's education and professional pathways into the future' (CST, 2014a). Based on their analysis of the global megatrends, 58 future jobs are predicted to be in high demand by 2030. *'Nostalgist'* (a term invented by CST), a professional that combines the roles of therapist, designer and historical and memory researcher, is listed as one of the future jobs. Though I think that the job description of a design 'nostalgist' should be broader than the one in the original document – 'an interior designer specialising in recreating memories for retired people' (CST, 2014b) – it at least suggests that nostalgia, as a topic of design, has been noticed by futurists.

Accelerating change is one of the key features of our times and will remain so in the future. This has suggested that nostalgia, as a design research topic, is more likely to be increasingly valued. As a researcher, I have realised it is difficult to maintain the value of some research over time in our fast-changing world. It normally takes at least four years to complete a doctoral research programme. At the end of their studies, doctoral students often find that the world has changed so much that the knowledge they created may no longer be as valuable and relevant as it once was. However, the need or desire for nostalgia is an inevitable reaction that individuals and societies have when faced with rapid and radical changes. It is this acceleration of change that has increased the demand for nostalgic experience, which will keep rising in the future. Therefore, I consider it more meaningful to study nostalgia than to study some seemingly novel topics whose value may be discounted through the passage of time.

My Passion

Finally, my overriding passion for studying nostalgia as a design researcher emerged mainly from the experience of a strong need for nostalgia in myself, and among all my childhood friends in China after China's economic revolution. This motivation is very personal but has made the long and tough journey of my doctoral studies very enjoyable.

Dissertation Outline:
Two Parts, Three Research Directions,
Seven Chapters

This doctoral research is designed to be both exploratory and versatile, and framed within a constructivist paradigm. With the concept of nostalgia at the centre, I identify three integrated design research directions around it: ***Nostalgia as a Sociocultural Phenomenon, as a Subjective Experience, and as the Basis of a Design Strategy.*** Despite having nostalgia as the common focus, these three research strands follow distinct design research traditions and are intended to answer different questions.

The doctoral research has two purposes and therefore is divided into two parts. Firstly, ***Part I*** of the dissertation, ***The Fundamentals*** (i.e. Chapter 1-3), serves as a ground-clearing work for opening the analytical discussions about nostalgia as a contemporary design research topic. For this purpose, the research strands of ***Nostalgia as a Sociocultural Phenomenon*** (i.e. Chapter 2) and ***as a Subjective Experience*** (i.e. Chapter 3) jointly clarify the designers' doubts and outdated understand-
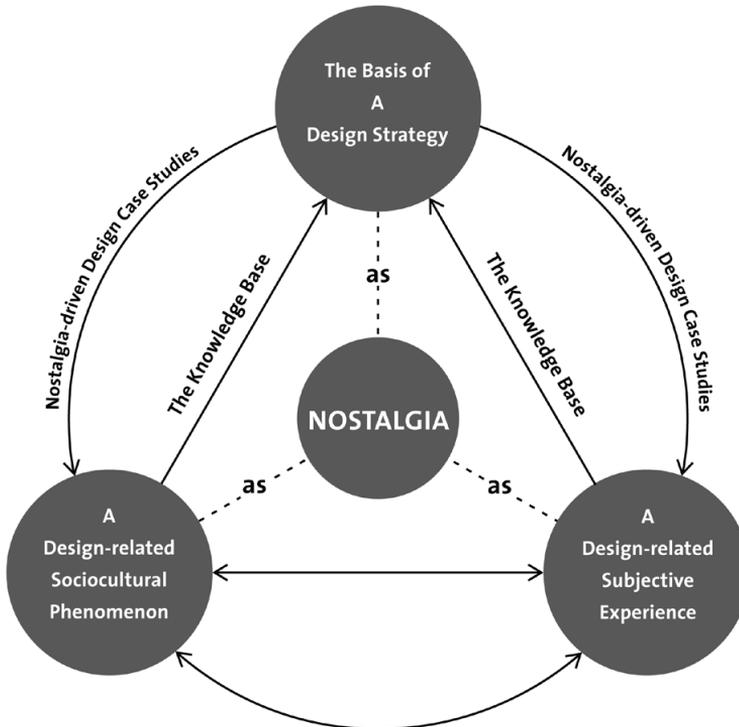
Figure 1. The three research directions of the dissertation

ings regarding nostalgia, and establish a broader stage for the further development of applied research in design and nostalgia. Secondly, ***Part II Nostalgia-driven Design Strategy*** (i.e. Chapter 4-7) develops the research towards the third direction, ***Nostalgia as the Basis of a Design Strategy***. On the basis of the knowledge generated in Part I, Part II is more specifically designed to study the viability of nostalgia-driven design as a common strategy for revitalising dormant brands.

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Part I
The Fundamentals

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On the basis of comprehensively redefining the concept of nostalgia (Chapter 1), Part I outlines the first two research directions: ***nostalgia as a sociocultural phenomenon*** (Chapter 2) and ***nostalgia as a subjective experience*** (Chapter 3). It is heavily based on relevant multidisciplinary literature, though I use several case studies to illustrate and develop my arguments. Therefore, most of the new knowledge in the first three chapters is generated from analysis and synthesises the latest knowledge on nostalgia in a design research context.

Chapter 1 establishes the basis for the whole dissertation and clarifies some common misunderstandings about the key concepts. Based on a critical review and analysis of multidisciplinary literature as well as long-term empirical observations, I differentiate nostalgic experience (immediate experience) from nostalgic memory (remembered experience), which paves the way to redefining nostalgia as the combination of affective reactions engendered by the recall of nostalgic memory. Though nostalgic memories are always positively remembered experiences, whether nostalgia occurs as a negative- or positive-affect-dominated immediate experience depends on the circumstances under which nostalgic memory is retrieved. Readers may find the connection between nostalgia and design relatively tenuous in Chapter 1, but it is important to clarify the complex and confusing concept in the beginning for the purposes of later chapters that situate nostalgia more firmly in the design research context. In addition, Chapter 1 not only establishes the basis of applied research in this context, but also attempts to contribute to more basic and widely transferable knowledge on nostalgia. Readers will find the answers to the five following questions:

- *What was nostalgia?*
- *What is nostalgia?*
- *Why has the concept of nostalgia changed so much over the past three centuries?*
- *What is the scope of nostalgia in this dissertation?*
- *From which perspective have I studied nostalgia in this dissertation?*

Chapter 2 presents the research strand of nostalgia as a sociocultural phenomenon, where it is situated in the research tradition of design and culture. The main aims of this chapter are to argue why nostalgia deserves more attention in the design field when the world is in a state of flux, and to encourage the design field to actively and innovatively explore the positive potentials of nostalgia, for the sake of both commercial and social benefits. Based on a review of two models of change, Chapter 2 discusses the concept of regional and global nostalgia waves in relation to cultural nostalgia, design, and cultural identity. The nostalgia wave in East and Central Europe caused by radical political change, the one in China forced by revolutionary economic change, and the global nostalgia wave led by technological change are described to illustrate the relationship between the increasing collective need for nostalgia and radical and rapid changes. After that, nostalgia-driven design cases riding these three nostalgia waves are analysed in order to shed light on the role that design plays in the nostalgia waves. Drawn from more cases, both the market and social design opportunities associated with nostalgia are discussed. Chapter 2 is intended to address the following three questions:

– *How are nostalgia waves formed at the regional and global levels?*
– *What role does design play in the nostalgia waves?*
– *What new challenges and opportunities for both commercial and social design might accompany the nostalgia waves?*

Taking nostalgia as a subjective experience, **Chapter 3** examines nostalgia through the lens of designing for experience. As a response to my dissatisfaction with the common misunderstanding in the design field that 'designing for nostalgic experience' equates to 'giving retro appearance or visual style', this chapter aims at better influencing or informing designers about how they may design for nostalgic experience through more innovative approaches. Accordingly, through mainly deductive reasoning, it gathers, adapts and synthetises theoretical frameworks and knowledge drawn from design as well as other relevant disciplines (e.g. psychology and consumer research). Acknowledging the importance of visual cues, it stresses the great potential of evoking nostalgic experience through designing multisensory cues (e.g. auditory, olfactory) and interaction cues (e.g. behaviours, actions, bodily movements and social interaction) for nostalgic memory. Two research questions are addressed in this chapter:

– *How may interacting with products evoke nostalgic experience?*
– *What are the influential factors of nostalgic experience that designers need to be aware of?*

Part II Nostalgia-driven Design Strategy

Part II presents the third research strand of the dissertation: ***nostalgia as the basis of a design strategy***. In spite of the fact that nostalgia has much wider potentials in both the market and social models of design, Part II narrows down the focus to the market model and looks into the impact of cultural nostalgia from the perspective of design strategy and management. More specifically, it investigates nostalgia-driven design as a strategy for dormant brand revitalisation.

Chapter 4 serves as a general introduction to Part II, which elaborates the phenomenon studied, research questions addressed and research approach used in Part II. Firstly, the phenomenon of phoenix brand is presented through a generic storyline drawn from the case studies. Following that, the new concepts involved in the phenomenon are defined. It further identifies three research foci of the phenomenon, and introduces three accompanying research questions of Part II. The second half of this chapter systematically elaborates on the methodological issues. It starts with introducing and explaining the paradigm selection of this research (i.e. a social constructivist paradigm). Then, based on a review of case study research strategy, the rationale for using qualitative case study as the research approach is explained. Under the guide of these research questions, specifically, a single case study (i.e. Sarvis) plus a multiple-case study (i.e. Forever-C, Jopo and TDK) were designed and conducted to address different foci and investigate different research questions of Part II.

- *Focus 1: The (potential and revived) phoenix brands*
- *Focus 2: The collectors/consumers/users and the nostalgic bond with these brands*
- *Focus 3: The designers who successfully transformed dormant brands into phoenix brands and their nostalgia-driven design processes*

- *RQ 1: What characteristics of a dormant brand may indicate that it possesses significant potential to be revitalised through nostalgia-driven design?*
- *RQ 2: With the passage of time, how do people (collectors/users/consumers) form nostalgic bonds with potential phoenix brands and their obsolete first-life products, and perceive the change in value?*
- *RQ 3: In the real-life context, how has nostalgia-driven design, as a dormant brand revitalising strategy, been successfully deployed?*

Chapter 5 reports a single case study on *Sarvis*, a once dominant but long dormant Finnish brand whose obsolete first-life products (i.e. plastic tableware) have been enjoying an increasing perceived value in recent years. Taking Sarvis as a potential phoenix brand, and **Focus 1** and **Focus 2** as the units of analysis, this chapter aims

1) to initially probe the possible common characteristics of the (potential) phoenix brands, 2) to clarify the formative process of the nostalgic bond between people and the potential phoenix brand, and 3) to understand the change in the perceived value of phoenix brands in terms of both the volume and hierarchic structure. Holbrook's typology of perceived value (1996, 1999, 2006), the *Rubbish Theory* (Thompson, 1979, 2003) and *Memory Retrieval - Nostalgic Experience Model* introduced in Chapter 3 are combined to serve as a theoretical and analytical framework. By analysing qualitative data collected through ten in-depth interviews with both the collectors of Sarvis and ordinary consumers (non-collectors), as well as the lifecycle of the brand and its artefacts, this case study answers **RQ 1** and **RQ 2**.

Chapter 6 and **Chapter 7** together present a retrospective multiple-case study that comprises three cases: *Forever* (a bicycle brand with cultural nostalgic influence in China), *Jopo* (a bicycle brand with cultural nostalgic influence in Finland), and *TDK* (a global brand for cassette tapes with worldwide cultural nostalgic influence). Historically the three brands all dominated their markets decades ago, then became dormant in the B2C environment for various reasons, and have been successfully revitalised to become phoenix brands through a nostalgia-driven design strategy in recent years. The two chapters set **Focus 1** (i.e. revitalised phoenix brands) and **Focus 3** (i.e. the designers and their nostalgia-driven design process) as the units of analysis. They are intended 1) to verify the initial findings regarding the common characteristics of potential phoenix brands, and 2) to discover the key drivers of nostalgia-driven design strategy for phoenix brand revitalisation.

In general, the data were collected through three sources: 1) online and offline documents, 2) artefacts, and 3) in-depth interviews with the principal designers or design decision makers of these projects. Among these sources, the in-depth interviews were the most important. As an effective way to combine and reduce data collected from multiple sources, Chapter 6 takes a case-oriented approach to present and analyse the three cases in a detailed, systematic, holistic but relatively individual manner. On the basis of the emerging commonalities, patterns and unexpected issues in Chapter 6, as well as the newly secured theoretical and analytical frameworks, Chapter 7 develops a cross-case analysis in a variable-oriented way. In particular, crafting an aura of authenticity around the phoenix brand is identified as the key to transferring the original nostalgic bond to the newly reborn phoenix brand and its new revitalising products. Therefore, the variable-oriented analysis is mainly developed to explore how authenticity could be crafted in design, production and communication terms.

At the end of the dissertation, the most important contributions of this doctoral research are clearly stated again. Moreover, the new questions, issues and promising research directions that emerged from the current research are discussed.

Part I

The Fundamentals

Chapter 1

Redefining Nostalgia

1.1
Introduction

In order to study the relevance of nostalgia to design practice and research, one must first clearly define nostalgia in the context of design and establish appropriate research boundaries. But what is nostalgia in the first place? This seems to be a simple question, since we have all probably experienced it as a yearning for something from the past and enjoyed sharing or re-experiencing pleasant memories. In our daily lives, there are typical moments when nostalgia might occur, such as when rearranging old family photos (possibly with siblings and parents), seeing and playing with childhood toys again (possibly with childhood friends), listening to favourite music and attending a reunion party. Such activities can often evoke seemingly forgotten but meaningful memories. We talk and laugh about the past and often experience mixed emotions simultaneously – joy, warmth, excitement and sometimes the shared feeling that time flies too quickly. We may also feel that something that we cherished in the past no longer exists. Nonetheless, whilst seeking scientific definition(s) of nostalgia from previous literature, it emerged that 'nostalgia' as we understand it today is very different from its early definitions, the meaning of nostalgia having gone through several transformations over the past three centuries. Thus there are two crucial questions that should be answered at the beginning of this dissertation – 'What was nostalgia?' and 'What is nostalgia?'

This chapter addresses some basic considerations when studying nostalgia as a contemporary design issue. The first question – *'what was nostalgia?'* – is answered in **Section 1.2,** which presents a chronological review on the origins of nostalgia as a topic of scientific research and its three centuries of subsequent evolution, from a potentially fatal medical disease to a contemporary socio-cultural phenomenon engendering a predominantly positive experience. **Section 1.3** answers the second question – *'what is nostalgia?'* – based on the analysis and reconstruction of some frequently cited definitions given by psychologists, sociologists, historians and consumer researchers. In addition, by reviewing the latest multidisciplinary literature on nostalgia, I further clarify its key characteristics, including its affective attributes, contents and stimuli. **Section 1.4** addresses the question of *'why*

the concept of nostalgia has changed so much' and provides an explanation for '*why this experience is currently desirable and enjoyable'*, by suggesting a new general definition of nostalgia that differentiates nostalgic memory from nostalgic experience. Based on this differentiation, I propose a better understanding of nostalgia by regarding it as a conditional rather than a historically changeable concept. More specifically, I argue that changes in three crucial conditions in the contemporary world have inevitably established nostalgia as needed, positive, beneficial and enjoyable. **Section 1.5** introduces the typology of nostalgia. It first describes, compares and contrasts existing classification methods, on the basis of which I then introduce an improved method of classifying nostalgia. I also define both the scope of nostalgia and the perspective from which I have studied nostalgia in this doctoral research. Finally, **Section 1.6** draws specific conclusions from the above.

1.2
What Was Nostalgia?

Researchers generally agree that descriptions of nostalgia predate the term itself. For example, in Western culture, occurrences of nostalgia-related descriptions can be traced back to the writings of Homer, Hippocrates and Caesar (Havlena & Holak, 1991; Sedikides, Wildschut, Arndt, & Routledge, 2008; Wildschut, Sedikides, Arndt, & Routledge, 2006). Nevertheless, formal scientific studies of nostalgia only commenced from the 17th century onward, when the term originated. The history of nostalgia therefore starts with the birth of this term.

1.2.1
The Origins and Early Conceptual
Evolution of Nostalgia

Surprisingly, the term 'nostalgia' initially had nothing to do with the romance or fantasy that people normally associate it with now. In fact, the concept originated in medical research. In 1688, the Swiss physician Johannes Hofer (1688/1934) coined the term 'nostalgia' in his dissertation to name a neurological disease afflicting Swiss mercenaries who were fighting in conflicts remote from their homeland. Etymologically speaking, 'nostalgia' is composed of two Greek words – *nóstos* (return to the home) and *álgos* (pain or suffering). A medical term formed in this manner usually indicates where the pain comes from. Another example is cephalalgia (*kephalē + álgos,* meaning headache). The original meaning of nostalgia is thus clearly evident through this combination, as a suffering originating from an unfulfilled desire to return to one's homeland. Obviously, it shared a similar meaning with (extreme)

homesickness. Homesickness was not a new concept even at that time and words expressing a similar meaning had emerged in many European languages, such as '*heimweh*' (German), and '*maladie du pays*' (French). One of the most important of Hofer's contributions was that he elevated the status of this concept to that of a disease, and since then nostalgia and homesickness as equivalents became a subject for scientific investigation (Dickinson & Erben, 2006; Starobinski, 1966).

Though it may sound rather absurd today, according to Hofer (1688/1934), nostalgia was considered to be an abnormal state of fever and lassitude with such symptoms as 'disturbed sleep either wakeful or continuous, decrease of strength, hunger, thirst senses diminished, and cares or even palpitations of the heart, frequent sighs, also stupidity of the mind' (ibid., p. 386). It was seen as potentially fatal if left untreated. Luckily, Hofer found that this terrible-sounding condition could be cured as soon as the patient returned home. If returning home was impossible, prescribing opium and leech therapy was believed to be helpful. After Hofer's dissertation, many physicians (mainly military doctors) continued to research nostalgia for the next two hundred years, but their proposed pathogenesis of nostalgia greatly depended on perceived physical changes in the sufferers. For example, in 1732, Scheuchzer argued that nostalgia was caused by 'a sharp differential in atmospheric pressure causing excessive body pressurization, which in turn drove blood from the heart to the brain, thereby producing the observed affliction of sentiment' (cited in Davis, 1979, p. 2).

Another interesting characteristic of early nostalgia studies was that Swiss soldiers were considered to be the only possible sufferers of nostalgia, a view held for a very long time. It was not until 1774 that for the first time 'nostalgia was reported among peoples other than the Swiss' (McCann, 1941, p. 169). Subsequently, over the following decades, nostalgia cases were diagnosed in many other European (English, Laplander, Austrian, French, etc.) military forces. As the number of studies on nostalgia increased in the 19th century, researchers gradually gained a much greater understanding of it. Finally, in 1821, Trade and Pinel discounted this limited definition of nostalgia as a vocational illness of soldiers, by stating that it can be experienced by all those who are away from home, not just soldiers (Bellelli & Amatulli, 1997).

From the 18th to the 19th century, studies on nostalgia remained mainly the province of physicians, but the core research area gradually shifted to psychiatry from the late 19th to the early 20th century (Batcho, 1998). Over the 19th century, nostalgia had also been gradually losing its credibility as an appropriate medical disease category. One of the milestones of this process occurred when the UK's *Royal College of Physicians* excluded nostalgia from its *Nomenclature of Diseases* in 1899, and claimed that it was unworthy of any medical classification (Sullivan, 2010). After

this, nostalgia became more frequently viewed as a form of melancholia (McCann, 1941), an 'immigrant psychosis' (Frost, 1938, p. 801), or a psychiatric disorder among people whose homecoming was prevented. Notably during this period, nostalgia was still an alternative term for homesickness and the most susceptible populations were generally assumed to be 'soldiers, seamen, immigrants and first-year boarding or university students' (Sedikides, Wildschut, & Baden, 2004, p. 202). However, nostalgia was not classified as a psychiatric disorder for very long. Soon it would be considered a normal and prevalent experience in everyday life.

1.2.2

Demilitarisation and Further Debates on Nostalgia

'The 20th century began with utopia and ended with nostalgia' (Boym, 2007, p. 7).

In the latter part of the 20th century, the concept of nostalgia underwent two major transformations, through which it became 'demilitarised'. The first was that nostalgia was rapidly assimilated into popular culture, and eventually became a memory- and culture-related experience that was desirable and enjoyable in everyday life. Secondly, the main scientific research areas of nostalgia became sociology (e.g. Boym, 2001; Davis, 1979), psychology (e.g. Batcho, 1995; Sedikides et al., 2004), history (e.g. Lowenthal, 1985), anthropology (e.g. Stewart, 1988), and consumer research (e.g. Havlena & Holak, 1996; Holak & Havlena, 1998; Holbrook, 1993a; Holbrook & Schindler, 1991).

Nostalgia in Popular Culture and Everyday Life

There are places I remember
All my life though some have changed
Some forever not for better
Some have gone and some remain
All these places have their moments
With lovers and friends I still can recall
Some are dead and some are living
In my life I've loved them all
But of all these friends and lovers
There is no one compares with you
And these memories lose their meaning
When I think of love as something new
Though I know I'll never lose affection
For people and things that went before I know
I'll often stop and think about them
In my life I love you more

In My Life (Lennon and McCartney, 1965)

A new meaning of nostalgia gradually emerged in the realm of popular culture while it was still considered to be an illness and a mental disorder. In the US, for example, the earliest appearance of the term as a culturally relevant emotion in the popular press can be traced back to 1863 – when the column 'Gossip From Paris' in the *New York Times* used 'nostalgia' to describe how the nouveau riche reacted emotionally when they revisited their poor childhood neighbourhoods in the Faubourg St Antoine (Sprengler, 2009). Although the popular press had already started occasionally referring to nostalgia in the latter part of the 19th century, it was not common until a century later. 'In the second half of the twentieth century, nostalgia steadily became bound up with popular culture' and 'thoroughly entwined with the consumer-entertainment complex' (Reynolds, 2011, p. xxix). Nostalgic elements can now be found in all kinds of cultural practices, from literature to music, from advertising to film and television, from the built environment to product design and branding. To some extent, cultural and creative practitioners have come to view 'nostalgia-evoking' as a guarantee of success, both artistically and commercially. Consequently, nostalgia has become fully embedded within global and local cultures as an emotional response to the past.

Meanwhile, nostalgia has been broadly recognised as a perfectly normal experience by researchers since the 1950s. Within the basic research into nostalgia, two approaches to the subject can be discerned. Firstly, psychology researchers tend to examine nostalgia from a relatively individual point of view. They have contributed considerable new knowledge about nostalgia as a subjective experience and emotion that most people may have as individuals. In contrast, sociology and anthropology researchers frequently investigate nostalgia as a collective phenomenon that is greatly influenced by social, cultural, economic, political, and technological factors. Despite different foci, there are great overlaps between these two research traditions. They have contributed to each other's disciplines and reformed the contemporary scientific concept of nostalgia as a fundamental human experience. After nostalgia became viewed as common and normal, the debates centred on how good or how bad this experience was at both individual and collective levels. Subsequently, we have witnessed a trend that considers nostalgia as a positive and healthy emotion, albeit with additional complexity.

Nostalgia in Psychology

One of the most debatable and basic aspects of nostalgia is the affective signature of the experience (i.e. whether it is negative or positive by nature). Both psychologists and sociologists have contributed to the debate and three groups holding different opinions can be identified: negative, positive and bittersweet.

Understandably, given its 'disease' origins, many psychologists argued that nos-

talgia was a negative emotion, especially in the 1970s and 1980s. For example, Ortony, Clore and Collins (1988) describe nostalgia as an emotion involving morbid thoughts, sadness or mourning about the past and thus having a negative impact on wellbeing. The 'negative group' often based their argument on the view that some cherished aspects of the past are irredeemably lost (e.g. loved ones passing away) and therefore feelings of loss and sadness are often involved in nostalgia (e.g. Best & Nelson, 1985; Hertz, 1990).

However, Davis (1979) holds a completely different view of nostalgia to that of a purely negative emotion. He claims that nostalgia is 'a positively toned evocation of a lived past' (p. 18), and it is 'infused with imputations of past beauty, pleasure, joy, satisfaction, goodness, happiness, love, and the like, in summary, any or several of the positive affects of being. Nostalgic feelings are almost never infused with those sentiments we commonly think of as negative, for example, unhappiness, frustration, despair, hate, shame, abuse' (p. 14). From the late 1980s to the turn of the 21st century, the view of nostalgia as a positive emotion quickly gained acceptance. Though the majority of researchers support the arguments highlighting the positive nature of nostalgia (e.g. Chaplin, 2000 ; Gabriel, 1993), the minor negative aspects of nostalgia have remained a concern.

Apart from the negative and positive groups, there is a 'bittersweet group' occupying the middle ground. Researchers from this group affirm the positive nature of nostalgia yet admit that some minor negative aspects may appear occasionally as part of this complex experience. They consider nostalgia 'a wistful pleasure, a joy tinged with sadness' (Werman, 1977, p. 393). It is worth noting that the positive and negative aspects of nostalgia are not commensurate, as Sedikides and colleagues (2004, p. 204) state that nostalgia is 'a disproportionately positive emotion, with bittersweet elements'. This argument has been supported by many recent empirical studies by these authors and others (e.g. Holak & Havlena, 1998; Wildschut et al., 2006).

Based on my reflections on existing literature and long-term observations, I propose a new perspective for understanding the affective signature of nostalgia. Though more detailed discussions on this issue are developed in Section 1.4, simply speaking, there would not be such debates if we understood nostalgia as a conditional concept, with two interdependent experience levels – the nostalgic memory (remembered experience) and the nostalgic experience (immediate experience elicited by the recall of nostalgic memory). Nostalgic memory is by definition always positive as Davis claims that it is 'infused with imputations of past beauty, pleasure, joy, satisfaction, goodness, happiness, love, and the like, in sum, any or several of the positive affects of being' (1979, p.14). However, nostalgic experience, as an affective result of the recall of nostalgic memory, could be characterised by negative emotions as well as positive ones. It depends on the circumstances under which nostalgic memory is recalled.

Nostalgia in Sociocultural Studies

It is impossible to be unaware of the power of nostalgia in contemporary social and cultural life. As Furedi (1992, p. vii) suggests, 'the sense of the past seems to preside over vast areas of social life. In culture, intellectual life and private hobbies, past times are impregnated with nostalgia'. As in the case of the field of psychology, disputes around nostalgia's capacity for goodness and badness also occurred in sociocultural research. Critics generally attacked what they claimed is nostalgia's inherent conservatism and its 'prettification' of 'real' history. The contemporary collective nostalgia of societies is often argued to be inherently conservative, backward looking, and also the reason for the growth of a dubious heritage industry and obsession with the past. For example, in *'On Living in an Old Country'*, Wright (1985) expressed a critical opinion regarding the rise of British nostalgia and heritage by claiming that they distract society from engaging with the present and future. Similarly, Hewison (1987, p. 9) criticised the UK's heritage industry, suggesting that the underlying nostalgia fever may cause the 'imaginative death of the country' and Britain may eventually become 'a country obsessed with its past, and unable to face its future' (ibid., p. 102). He worries that, 'if the only new thing we have to offer is an improved version of the past, then today can only be inferior to yesterday. Hypnotised by images of the past, we risk losing all capacity for creative change' (ibid., p. 10).

Predictably, there are also scholars who hold more positive views of this phenomenon, contending that those critics themselves are 'pedagogically quite conservative', whilst arguing that the exploration and use of nostalgia in contemporary cultural life enriches particular forms of history (Samuel, 1994, p. 125). According to Davis (1979), true nostalgia only happens on the basis of a personally experienced past; he therefore argues that people actively engage with nostalgia and the past memories it evokes, rather than passively receiving it.

Based on a review of the both sides' arguments, I realise that the opponents and advocates of nostalgia often engage with different concepts of what nostalgia is. In general, the detractors consider nostalgia a general and indiscriminate affection for anything from the past, often from distant history (e.g. over two hundred years ago). However, to advocates, nostalgia represents a unique positive experience that is based on recent memories that are active, alive, personal as well as social. Section 1.5 develops a detailed view of my own position on this issue.

Applied Research on Nostalgia in Consumer Behaviour

After the birth and development of experiential consumption research in the 1980s (see Holbrook & Hirschman, 1982), consumer researchers since the 1990s have recognised nostalgia as an experience that consumers enjoy and that can add value to

brands, products and services. Unlike the late 20th century psychologists and soci-ocultural researchers debating whether nostalgia is negative or positive in nature, or beneficial or harmful to society, the general consumer researchers' premise is that nostalgia is appealing to consumers. As a result, in spite of being conducted primarily as applied research, nostalgia studies in the area of consumer behaviour have also greatly increased basic knowledge on nostalgia, especially as a desirable experience and preference. For example, in a series of studies by Holbrook and Schindler (1989, 1994, 1996; Schindler & Holbrook, 2003), the nostalgic influences on consumer tastes in different product types were investigated. They found that the nostalgic preference effect greatly influences the formation of certain enduring consumer tastes, not only in cultural and artistic forms (e.g. popular music, films, film stars, the visual arts) but also in relatively more utilitarian products (e.g. automobiles, furnishings). It was also found that there is often a specific peak age for consumers to form their nostalgic preferences for certain product types (e.g. at the age of 14 for film stars and the age of 24 for pop music in American samples).

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1.3

What Is Nostalgia?
– The Contemporary Concept

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In the contemporary world, nostalgia has acquired a distinctly modern conceptual status among both researchers and the general public (Olick, Vinitzky-Seroussi, & Levy, 2011). Though new and often surprising knowledge about nostalgia is rapidly being discovered, the key research areas of nostalgia remain relatively stable across psychology, socio-cultural studies and consumer research. Due to the complexity of nostalgia, most of the definitions are descriptive rather than determined. Individually none are able to cover every aspect of nostalgia, but instead serve to highlight different characteristics from different perspectives. In Table 1, I firstly present some frequently quoted definitions and parameters of nostalgia derived from existing literature. By doing so, I offer a more comprehensive understanding of the contemporary concept of nostalgia. This will serve as a platform for discussions of this concept within the design context in the following chapters.

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1.3.1

An Experience or a Special Preference

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According to these definitions, nostalgia is generally defined as an emotion, experience, feeling, mood or affective state. Obviously, nostalgia is not one of the basic emotions (e.g. love, joy, surprise, sadness, fear) but a combination of many. I there-

'A positively toned evocation of a lived past'	(Davis, 1979, p. 18)
'Nostalgia is memory with the pain removed. The pain is today.'	(Lowenthal, 1985, p. 8)
'A wistful mood that may be prompted by an object, a scene, a smell, or a strain of music'	(Belk, 1990, p. 670)
'A positively valanced complex feeling, emotion, or mood produced by reflection on things (objects, persons, experiences, ideas) associated with the past'	(Holak & Havlena, 1998, p. 218)
'A sentimental or bittersweet yearning for an experience, product, or service from the past'	(Baker & Kennedy, 1994, p. 169)
'An emotional state in which an individual yearns for an idealized or sanitized version of an earlier time period'	(Stern, 1992, p. 11)
'A preference (general liking, positive attitude or favourable effect) towards experiences associated with objects (people, places or things) that were more common (popular, fashionable or widely circulated) when one was younger (in early adulthood, in adolescence, in childhood or even before birth)'	(Holbrook & Schindler, 1991, p. 330; 2003, p. 108)
'Nostalgia is a universal experience: It concerns all persons, regardless of age, gender, social class, ethnicity, or other social groupings. Nostalgia is a self-relevant emotion that involves reliving one's past, and in particular events involving one's important but bygone relationships. Its bittersweet content notwithstanding, nostalgia is predominantly positive. Furthermore, nostalgia is typically triggered by a threatening stimulus (e.g., death of a loved one, health problems, relationship dissolution, and income loss) or is a deliberate response to an uncomfortable psychological state (e.g., sadness, loneliness, anxiety, and alienation), although it can also be triggered by fortuitous stimuli (e.g., old photographs, letters, or CDs). Most important, nostalgia, by being a stock of positive feelings, can ward off external threat or distressing thoughts. Nostalgia serves three core existential functions: self-enhancement, alignment with the cultural worldview, and fostering of close relationships. Successful fulfilment of one or more of these functions contributes to positive affectivity and a state of reassurance, warmth, and security.'	(Sedikides et al., 2004, p. 210)

Table 1. Contemporary Definitions of Nostalgia

fore consider nostalgia an experience and use the term 'nostalgic experience' and 'nostalgia' interchangeably throughout this dissertation.

Interestingly, Holbrook and Schindler (1991, 2003) view nostalgia slightly differently, as a human preference for experiences associated with the past. This definition highlights two important issues: 1) 'Preference' further suggests that nostalgia is preferable or desirable, no matter whether it is negative, positive or a mixed experience. 2) It also includes non-symbolic or purely aesthetic nostalgic experiences. The objects that evoke nostalgia often possess symbolic meanings or remind the nostalgic person of positively toned autobiographical memories. However, individuals may sometimes feel a special affection for the style or appearance of an object, but not necessarily associate it with any personal episodes. The audience in this case may often be incapable of articulating the reasons for such a nostalgic preference. A more detailed discussion on this issue is developed in Chapter 3.

1.3.2

A Common Experience
and a Sociocultural Phenomenon

Boym (2001) claims that nostalgia is an emotion that almost all adults can experience and this has also been empirically supported by many other psychological studies. For example, in one survey in the UK, 79% of participants reported that they experienced nostalgia once a week or more, 17% of participants indicated that they experienced nostalgia at least 'once or twice a month,' and only 4% stated that they do not have nostalgic experiences frequently (Wildschut et al., 2006). Thus, for the purposes of this research, I concur with Sedikides and colleagues in viewing nostalgia as a universal human experience that 'concerns all persons, regardless of age, gender, social class, ethnicity, or other social groupings' (Sedikides et al., 2004, p. 210). Meanwhile, as socio-cultural researchers have generally noted, nostalgia is often experienced collectively in particular social and cultural contexts and therefore manifests as a socio-cultural phenomenon.

1.3.3

Based on Idealised Memory

Memories are the basis of nostalgia, but not every recall results in it. As Stern (1992) and Lowenthal (1985) stressed in their definitions, nostalgia is based on 'idealised,' 'sanitised' memories, or memories 'with the pain removed.' Many psychological studies have revealed a 'rosy' effect on human memory, that is, there is a strong tendency for people to selectively enhance the positive aspects in their memories,

but unconsciously forget or neglect the negative ones (Greenwald, 1980; Mitchell, Thompson, Peterson, & Cronk, 1997). Emotionally charged autobiographical memories featuring negative emotions fade faster than those dominated by positive emotions (Walker, Skowronski, & Thompson, 2003). One reason for this asymmetry in autobiographical memory is often explained in terms of individuals attempting to minimise the impact of negative events on their wellbeing, and therefore it can be considered as a common and healthy coping process (Taylor, 1991). As a result, nostalgia does not appear to engage with the accuracy and comprehensiveness of ordinary memory, but is instead limited to the remembered positive past. Thus it 'can be thought of as a kind of telephoto lens on life which, while it magnifies and prettifies some segments of our past, simultaneously blurs and greys other segments, typically those closer to us in time' (Davis, 1979, p. 31). In this dissertation, I therefore define the idealised memory that serves as the basis of nostalgic experience as ***Nostalgic Memory***. More issues on nostalgic memory are discussed in Section 1.4.

1.3.4

Diverse Stimuli

As shown in Table 1, many researchers have sought to identify the range of possible stimuli or triggers of nostalgia. Artefacts, scenes, smells, strains of music, persons, experiences, ideas … almost everything associated with the positive past may serve to stimulate nostalgia. In one study conducted by Holbrook and Schindler (2003), informants mentioned a wide range of objects as nostalgia-evoking. The object could be large or small, expensive or inexpensive, decorative or functional, handmade or mass-produced, edible, branded, musical, out of style or unique. It seems that 'there is no limit to the types of object that can carry nostalgic feelings' (p. 121). Additionally, in the same study, relationships with others, especially significant or loved ones, are also found to be a common source of nostalgia. Therefore, interacting with those who share similar nostalgic memories is another important stimulus. Nonetheless, 'stimuli of nostalgia' in my opinion is not a perfect term for these objects, because it may mislead people to ignore the mediating role of nostalgic memory, and to assume that nostalgia is directly evoked. Thus, I would rather name these 'stimuli' 'mementos of nostalgic memories'. This concept is further discussed in Section 1.4.

1.3.5

A Predominantly Positive Experience

As introduced in Section 1.2.2, nostalgia as a bittersweet emotion is the dominant current view, and there is a research trend for an increased focus on its positive aspects and functions. This characteristic of nostalgia can also be identified from most of the definitions shown above.

1.3.6

The Functional View

In terms of why nostalgia occurs, many researchers have proposed that it is not without purpose and can serve many important psychological functions. This might be a surprise given the disease-related origins of the term. Perhaps even more surprisingly, with the support of compelling empirical data, experiencing nostalgia has been claimed to be beneficial to both psychological and physiological wellbeing. According to a series of recent cross-cultural studies (Iyer & Jetten, 2011; Juhl, Routledge, Arndt, Sedikides, & Wildschut, 2010; Routledge, Arndt, Sedikides, & Wildschut, 2008; Routledge et al., 2011; Routledge, Wildschut, Sedikides, & Juhl, 2013; Routledge, Wildschut, Sedikides, Juhl, & Arndt, 2012; Sedikides et al., 2008; Wildschut, Sedikides, & Cordaro, 2011) psychologists have identified four major functions of nostalgia which contribute to psychological wellbeing: 1) generating positive affect, 2) maintaining and enhancing self-esteem, 3) serving as a repository of social connectedness and 4) providing a sense of meaning in life. Furthermore, on the basis of the positive nature and psychological functions of nostalgia, the relationship between nostalgia and physiological wellbeing has also been identified as a potentially valuable future research direction (Sedikides et al., 2004; Sedikides et al., 2006). A recent study in this area suggests that nostalgia brings a feeling of warmth, not just psychologically but also physiologically. Being in a nostalgic state evoked by music helped the experiment participants to maintain their physiological comfort (i.e. having a comfortably higher body temperature) in an uncomfortably cold environment (Zhou, Wildschut, Sedikides, Chen, & Vingerhoets, 2012). Overall, the concept of nostalgia has been completely reformed by the results of recent scientific research on it. Nostalgia, in contemporary times, is not a negative concept at all, but considered 'a versatile homeostatic corrective' (Zhou et al., 2012, p. 683) for individuals and societies.

1.3.7

The Dark Side of Nostalgia

Despite the fast-growing body of knowledge on nostalgia as a positive experience that benefits wellbeing, it would be irresponsible to leave the potentially unhealthy and harmful effects of nostalgia unmentioned. As discussed in Section 1.3.3, nostalgia is derived from idealised memories with negative information removed. That is one of the key reasons why nostalgia is enjoyable and beneficial. However, such a rosy retrospection may also make nostalgia harmful or unhealthy under certain situations. For example, being overly nostalgic without any reflection, especially when facing present dissatisfactions or difficulties, often leads one to take nostalgic memory as a source of facts about the past, emotionally form an impression that 'everything was better in the past', and consequently feel pessimistic about the present and uninterested in new opportunities or experiences. Although this dissertation is intended to change the conventional negative understanding of nostalgia that the design community has held for a long time, and therefore focus on the positive side of nostalgia, it is meaningful and necessary to always bear its potentially negative effects in mind when discussing and designing for this experience.

1.4

Redefining Nostalgia
as a Conditional Concept

Many scholars may feel that making essential and original contributions to basic nostalgia research should be left to psychologists and sociologists only. As a design researcher, it is perhaps too ambitious for me to endeavour to give a better definition of nostalgia that provides an explanation for why and how the concept has changed so much in the past three centuries. However, one fact that has encouraged me to do so is that a great deal of fundamental knowledge on nostalgia was actually created by consumer researchers, mainly as applied research. This raises the question as to why design researchers cannot do the same? Nonetheless, this consumer-related contribution is meaningful and valuable to design research also. Moreover, though the contemporary concept of nostalgia is understood as a positive experience in most cases, nostalgia still emerges occasionally as a negative experience or contains negative aspects. Thus, from a design perspective, a better definition of nostalgia is more likely to include the conditions under which positive or negative attributes dominate nostalgic experience and how designers might intentionally minimise negative components or control the affective signature of the experience. The follow-

ing is my definition of nostalgia, and please note that 'nostalgia' and 'nostalgic experience' are used interchangeably in this dissertation.

Nostalgia (or nostalgic experience) is the combination of emotional reactions engendered by the recall of nostalgic memory.

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1.4.1

Nostalgic Memory and Nostalgic Experience

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Kahneman and Riis (2005) conceptualised two selves in the evaluation of human experience. One is the ***experiencing self***, which expresses the event that one is experiencing as being totally in the moment. For example, a massage therapist asks the patient during a therapy session - 'How are you feeling now?' The patient answers the question according to the experiencing self. In contrast, the ***remembering self*** is formed by memories. For instance, when one is asked about how his/her weekend was like, it is not the person's experiencing self but the remembering self, trying to answer the question. Based on the separation of two selves, I therefore separate two different types of experience – the ***remembered experience*** (i.e. memory of previous experience) evaluated by the remembering self, and the ***immediate experience*** (i.e. what is being experienced at the moment) evaluated by the experiencing self.

With the separation of remembered experience and immediate experience under consideration, ***Nostalgic Memory*** represents a special type of remembered experience that individuals wish to recapture in the present. Nostalgic memory is not retained as precise information that accurately records past experience, but results in idealised and emotionally charged memory instead. In this sense, nostalgic memory is always positive because no one is likely to long for negatively remembered experience.

On the other hand, ***Nostalgic Experience***, as a type of immediate experience, results from the recall of nostalgic memory. Though nostalgic memory is always positive, the recall of it does not always guarantee positive nostalgic experience. Whilst it may provide several positive emotions (e.g. joy, satisfaction, amusement, etc.), it is also possible that nostalgic experience is sometimes dominated by negative emotions (e.g. frustration, sorrow, despair, etc.).

From an historical point of view, nostalgia is a dynamic concept that needs to be viewed in different historical contexts. However, it is perhaps more meaningful to consider nostalgia as a conditional concept. This suggests that the affective contents and signature of nostalgic experience depend on certain key conditions (to be introduced later), under which nostalgic memory is retrieved. Over the past three hun-

dred years and across different cultures, the general circumstances have changed to become increasingly conducive to making nostalgia a positive, enjoyable and beneficial experience. To further explain this point, I need firstly to go back to basics to review how human emotions are elicited, specifically from a cognitive point of view.

1.4.2

Where Emotions Originate: Beliefs, Desires and Appraisals

Cognitive emotion theorists generally consider that emotions are based on 'beliefs and desires' (Reisenzein, 2006, p. 930) and understand the evocation of emotions through a concept called *'appraisal'*. First used by Arnold (1960a, 1960b), appraisal refers to a direct, immediate and intuitive evaluation of a given object or state of affairs, and it is the outcomes of appraisal that determine the quality of emotions. According to Arnold (1960a), organisms (e.g. users) constantly appraise the external and internal changes in relation to their own wellbeing. There are three levels of intuitive perception and evaluation of a state of affairs in the appraisal: 1) whether it is present or absent; 2) whether it is good (beneficial) or bad (harmful); and 3) whether it is easy, difficult or impossible to attain or avoid. The first level is about whether one truly believes that a state of affairs is present or absent. For example, drinking and talking with my friends might assure me or make me believe that a party is present. The second level refers to the 'value judgment' process in relation to one's needs or desires (Arnold, 1960b, p. 310), that is, a judgment on whether the state of affairs fulfils or frustrates, is consistent or inconsistent with one or more particular needs or desires. The third one 'concerns the belief that the state of affairs in question (a) if still absent, is easy, difficult or impossible to attain or avoid or (b) if already present, is easy, difficult or impossible to keep (positive state), or to undo or adapt to (negative state)' (Reisenzein, 2006, p. 932). A corresponding emotion is generated after the three levels of appraisal. For example, one will experience joy if one believes that an object or a state of affairs is present, is consistent with one's desires, and can be easily maintained. Hopelessness or despair occurs when a desired state of affairs is believed to be absent, and too difficult to attain. Sorrow or sadness results from the belief of the presence of a harmful object that is not very difficult to avoid.

Negative Nostalgia Vs. Positive Nostalgia: The Three Key Conditions

Let me preface this section with a thought experiment. John is currently a forty-year-old man. Twenty years ago, he had a fantastic road trip with his three best friends from college. He remembers the experience of that trip and cherishes it as a nostalgic memory celebrating his friendship, though he does not recall it often. Things have changed a lot in twenty years in both John's and his friends' lives. They are living in different cities far from each other, working hard for their own careers and supporting their families, and have not been in contact frequently. One weekend, after a very tiring week, John somehow recalls many happy memories of his 20s. Suddenly, he remembers that he still has physical things from his 20s in storage. He rummages through his dusty attic and finds an album with photos of that great road trip twenty years ago, the cassette tapes they played again and again on the road, a half-pack of cigarettes left over from the trip, and even the key to the old car that is still in his father's garage but has been barely touched for 15 years.

If you were John, what would you do next? I guess most of you would use your mobile phones to take photos of the things that you dug out from storage, then send them to those old friends through social media (e.g. Facebook). Soon you and your friends would be having emotional chats about the nostalgic memory you share. You might perhaps decide to go on the same trip together again in the same old car with the cassette tapes and that half pack of cigarettes. Sounds very cheerful and happy. However, let's imagine John were living in the 1700s when keeping in touch with anyone living far away was extremely difficult. Or if, back in the present, all those friends have sadly passed away for some miserable reasons, and no one else cares about that particular nostalgic memory that John cherishes. What would John's nostalgic experience be like in these latter two scenarios?

Arnold's structural analysis of emotion with respect to beliefs, desires, and appraisals influenced me to pay attention to three implicit but significant aspects of nostalgia: 1) the hidden need or desire that the recall of nostalgic memory is intended to fulfil; 2) under what conditions the recall of nostalgic memory is believed to be able to fulfil the need; 3) and how possible these conditions are to attain today compared to the past.

Wildschut and colleagues (2006) investigated the trigger question of nostalgia and reported that the three most common triggers are 1) *negative affect* (e.g. loneliness), 2) *social interaction* (e.g. conversation with old friends), and 3) *sensory input* (e.g. seeing and touching childhood toys). These three triggers in a way analogise three key conditions that greatly determine whether nostalgia is desired or needed, whether the experience is positive or negative, and how enjoyable or lamentable it is. The three conditions are:

1. *present negative affect and perceived conspicuous distinction between present and past*
2. *being able to share the nostalgic memory and emotions with relevant others*
3. *having (sensory or behavioural) mementos of the nostalgic memory available*

Nostalgia Need (Enhanced by the 1st Condition)

Among the three conditions, the first condition enhances the need for recapturing a positively remembered past and encourages the retrieval of nostalgic memory. I call such a need *Nostalgia Need*, a need for identity continuity and familiarity. As noted by Davis (1979, p. 34), typically after radical changes in life, nostalgia need 'occurs in the context of present fears, discontents, anxieties, or uncertainties, even though they may not be at the forefront of awareness, and it is these emotions and cognitive states that pose the threat of identity discontinuity'. In this sense, nostalgia need may be viewed as a manifestation of more fundamental human needs, such as the need for security and belonging.

How Do People Attempt to Fulfil Nostalgia Need?

Time is irreversible. Thus when nostalgia need arises, one cannot really live again in the past but instead one tries to restore or relive the setting – to be in the (same or similar) surroundings where the particular past happened, to do things one used to do, and most importantly to reconnect and share with others associated with the same nostalgic memory. In other words, *nostalgic social connections* (i.e. people who also lived in the same past and feel nostalgic about it), *nostalgic surroundings* (i.e. places one used to spend time in, artefacts one used to have), *nostalgic behaviours* (i.e. things one used to do) are typically utilised to fulfil nostalgia need. To link them with the key conditions, nostalgic social connections facilitate the second condition – being able to share and communicate a nostalgic memory with relevant others; the presence of a nostalgic environment and such shared behaviours can make rich sources of nostalgic memories available (the third condition).

Being Able to Share Facilitates Positive Nostalgia

Among the three conditions, the second condition, being able to share the memories and emotions, is the key factor in restoring the nostalgic setting mentally, determines whether nostalgia need can at least be mentally fulfilled, and therefore also greatly determines whether nostalgia is a negative or positive experience. To a great extent, the positive emotions that nostalgia provides are actually derived from sharing with relevant others or the anticipation of such a sharing experience. For example, in some museums exhibiting everyday artefacts from the more recent past, such as the Museum of Childhood and Museum of Brands, Packaging and Advertising in London, it is very common to see visitors sharing their nostalgic memories with families, friends or even strangers standing alongside them. The conversation often starts with one saying, 'I remember this … I used to have it when I was …' Another visitor then says, 'Yes, I had it at home too', and continues with his/her version of the same nostalgic memory. Such emotional sharing puts a smile on everyone's face. When a nostalgia need is increased and relevant nostalgic memory is retrieved, if one is able to share the memory and emotion with others who know and care for the same memory, retrieving the nostalgic memory will be more likely to be a way to fulfil nostalgia need and eventually ensure that the nostalgic experience is a positive experience. I call it ***Positive Nostalgia.***

Not Being Able to Share Facilitates Negative Nostalgia

If sharing nostalgic memories and emotions with relevant others immediately or in the foreseeable future is believed to be difficult or impossible, or the relevant others turn out to be indifferent to these memories, one's nostalgia need remains unfulfilled and the nostalgic experience is more likely to be marked by the hopeless realisation of a painful present, uncertain future, and a lost and irreversible happy past. In this case, though the nostalgic memory is anyway positive, the nostalgic experience is more likely to be dominated by negative emotions. This is what I call ***negative nostalgia***. Such a mode of nostalgia can be seen in many traditional definitions. For example, nostalgia is defined in *The New Oxford Dictionary of English* as 'a sentimental longing or wistful affection for the past, typically for a period or place with happy personal associations' (Pearsall, 1998, p. 1266). Apparently, in this definition, nostalgia is sentimental and wistful because it is believed to involve a need that is impossible to fulfil. When the nostalgic memory is more private or shared closely among a small number of others (e.g. two people), it is more likely that one of them will be in a situation where he/she realises that the important others who experienced and felt nostalgic about the same particular past are all permanently gone. In this case, the recall of nostalgic memory may well induce negative nostalgia.

However, there are two things worth clarifying at this point. Firstly, I am not

arguing that individuals cannot enjoy positive nostalgia alone. When a nostalgic memory is recalled, the sharing does not have to happen immediately in order to evoke positive nostalgia. Instead, there is an intuitive evaluation regarding whether such sharing is easy, difficult or impossible to carry out (e.g. through a phone call or social media, etc.). As long as the sharing session is believed to be likely enough to occur in the foreseeable future, the anticipated sharing can already lead to positive nostalgia. Consider, for instance, a woman who recalls a nostalgic memory when she finds the first love letter from her husband. Of course, the nostalgic experience will be positive if her husband is present at that moment to warmly share the nostalgic memory with her. The positive nostalgia will not become negative if her husband is absent at the moment but will be coming home in a few days. The affective signature has a much greater chance to become negative if she knows that it is unlikely that she will be able to share the positively remembered memory with her husband again (e.g. he is totally disconnected from the relationship and indifferent about that particular past) or impossible (e.g. he is dead). Secondly, I consider 'being able to share' one of the most important factors determining the affective signature of nostalgia as an immediate experience, but I do not claim that it is the only one, although I cannot yet specifically pinpoint the other ones. In addition, it is perhaps more appropriate, at this stage, to view this assertion as a hypothesis that is worth exploring further. To verify it still requires a sophisticated psychological research process, and I do not intend to do it in the current design research dissertation.

The Catalyst of Nostalgia: Mementos of Nostalgic Memory

The third condition, having mementos of nostalgic memories available can be seen as the catalyst of both positive and negative nostalgia. We can picture the human brain as a filing cabinet with numerous locked drawers and with many nostalgic memories locked in each drawer. The mementos of different nostalgic memories are analogous to the keys to the drawers. These mementos may include not only tangible objects that people attach nostalgic memories to (e.g. a pen, a cup, a photo), but also intangibles such as a taste, a smell, and behaviours or ways of doing things that can bring back nostalgic memories to the present. Since the mementos help recall vivid and rich nostalgic memories, having them around when nostalgia need intensifies could make positive nostalgia more enjoyable and negative nostalgia more regrettable.

The Dominance of Positive Nostalgia
in a Postmodern Era

When considering nostalgia or nostalgic experience as a conditional concept, an explanation for why nostalgia has changed so much from abnormal to normal and from negative to positive begins to emerge.

Modern (Negative) Nostalgia

Higson (2014) identifies two kinds of nostalgia associated with two different eras or forms of society: *modern nostalgia* and *postmodern nostalgia*. Modern nostalgia, as a response towards the experience of modernity, accompanies the processes of industrialisation and modernisation that were characterised by rapid change, increased mobility, and displacement. Similar to negative nostalgia, modern nostalgia is derived from a need to recapture a happily remembered past, which is believed to be impossible or very difficult to fulfil in the present. This was the norm before mass media began informing our collective memories and repeatedly showing us how many others share similar memories. It was also before information and communication technology allowed us to connect to each other, independent of spatial distance. Therefore, modern nostalgia is 'precisely that experience of longing, that experience of wistfulness' (Higson, 2014, p. 126). The person experiencing modern nostalgia 'does not become one with the object of longing' (Boym, 2001, p. 307). To a great extent, modern nostalgia is therefore negative nostalgia.

Postmodern (Positive) Nostalgia

'Interestingly, a 19th-century prediction that nostalgia would become extinct due to increased communication has not come to pass in our era of social networks' (Russ, 2014, p. 416). Perhaps, the earlier modern nostalgia had become extinct by the 20th century with increased communication. But, at the same time, a new positive mode of nostalgia emerged and became prevalent across the world – postmodern nostalgia.

The term postmodernism, in many social researchers' eyes, refers to a new form of society, in which contemporary human life is suffused with visual content and radically reshaped by visual culture. As a result, one of the most significant features of postmodern society is that the boundary between past and present is erased (Denzin, 2004). 'With postmodern nostalgia, arguably we do become one with objects associated with the past. Hopeless longing for a lost past is replaced by celebration of the styles of the past which are still accessible today and eminently collectable and consumable' (Higson, 2014, p. 126). The inventions and public absorp-

tion of media platforms (e.g. newspaper, magazine, radio, television, telephone, mobile phone, computer and Internet, web 2.0, smart mobile devices and cellular data network) enabled by the rapid development of ICT over the past three hundred years have made communicating and sharing nostalgic memories much easier to accomplish. In this constantly connected world, everyone is aware that many other people are sharing similar nostalgic memories. It has also allowed them to form new collective memories with diminishing barriers of spatial distance, which will become the source of collective nostalgic memories in the future. Furthermore, the mementos of nostalgic memory are now abundant. Despite accelerating change, the past never really goes away in the postmodern era. Those things we used to do, the songs we used to listen to and sing, the TV programmes we used to watch, the products we used to use, and the brands we used to be loyal to are seemingly out of our lives, but they have never gone far and can still be easily retrieved, especially in a virtual form online. Obsolete artefacts may either linger in our domestic environment or become available second-hand. Nostalgic videos and images are available to everyone through the Internet, shared by whoever has them at hand. All these have formed an abundant and easily accessible digital pool of mementos of nostalgic memories.

<div align="center">1.5</div>

The Typology and Scope of Nostalgia

Over the past five years, I have made presentations about this research in many different countries. In almost every Q&A session, a question was asked: can events or phenomena that predate one's own life evoke nostalgia? My answer to this question is not simple, but to be clear about it is essential. Though nostalgia has not yet been well studied in the context of design research, the term does appear in some design literature (mainly design history literature), yet often without a clear definition and classification. Generally, in the context of design, 'nostalgia' has been vaguely used to refer to any positive affective response to anything in the past, no matter how historical it was. Therefore, it has often been used to explain a phenomenon characterised by the revival of antique objects and design styles from the relatively remote past (e.g. over two hundred years ago) of specific cultures (e.g. Woodham, 1997). The remote past is usually assumed to be far older than most or all living people in the world and sometimes does not even indicate any specific land or time, but enables a general feeling for the past (e.g. Disneyland). Such a vague use of this term has caused confusion. Thus, in this section, four existing ways of classifying nostalgia are reviewed and compared, then further refined to provide a new classification of nostalgia for the research. The new classification stresses the relationship between

different types of nostalgia as a spectrum model on a timeline, rather than as several isolated entities, as well as differentiating nostalgia from antiquarian feelings. I am then able to specify which part of the nostalgia spectrum constitutes the focus of the enquiry in the chapters that follow. At the end of this section, I further clarify the scope of nostalgia by differentiating it from some similar but different concepts.

<div align="center">

1.5.1

The Classifications of Nostalgia: A Review

Simple, Reflexive and Interpreted Nostalgia

</div>

Davis (1979) has a threefold classification of nostalgia based on the degrees of cognitive reflection being experienced, which he calls first (simple), second (reflexive) and third (interpreted) order nostalgia. Davis argues that genuine nostalgia can only result from the recall of one's own lived past, which applies to all the three types of nostalgia he proposes.

Simple Nostalgia is a state of purely and unreflectively believing that things were better in the past than they are now and simple nostalgia is the most common of the three orders. Most people simply enjoy the experience pervasively but leave it unquestioned. The nostalgia boom or wave in a society is largely based on this form of nostalgia. *Reflexive Nostalgia* is characterised by a tendency to reflect on one's own nostalgic impulse. Through self-examination, the nostalgic person 'summons to feeling and thought certain empirically oriented questions concerning the truth, accuracy, completeness, or representativeness of the nostalgic claim' (Davis, 1979, p. 21). In this order, simple nostalgia is enriched by posing questionings questions, such as 'was my past life really that happy?' or 'have I forgotten some unpleasant aspects of the past?' These questionings make nostalgia 'a more complex human activity that can better comprehend ourselves and our past' (Davis, 1979, p. 22). *Interpreted Nostalgia*, which is probably rare among the majority of people, is more like a process of phenomenological analysis, during which 'the actor seeks in some fashion to objectify the nostalgia he feels. He directs at it (again with varying diligence and to varying degree) analytically oriented questions concerning its sources, typical character, significance, and psychological purpose. Why am I feeling nostalgic? What may this mean for my past, for my now? Is it that I am likely to feel nostalgia at certain times and places and not at others? If so, when and where? What uses does nostalgia serve for me? For others? For the times in which we live?' (Davis, 1979, pp. 24-25).

Concerning the connections with design, the three orders of nostalgia may be relevant to three different types of design practice and research that take nostalgia

as the focus. Firstly, most commonly in commercial design practice, design outcomes evoke consumers' and users' simple nostalgia to increase their liking for the products, services or brands. Secondly, reflexive nostalgia may be most appropriate to critical design practice. It goes beyond the simple pleasure of being nostalgic, evokes more conscious comparisons between past and present, and makes people rethink their own personal and cultural identities in the globalised post-industrial era. Thirdly, design researchers who are interested in the topic of nostalgia and design (e.g. the author of this dissertation) may often experience interpreted nostalgia, because there are always some phenomenological questions in their minds when encountering nostalgia-evoking artefacts.

Historical and Personal Nostalgia

Nostalgia is categorised by Stern (1992) as historical and personal. She suggests that the most important temporal element of historical nostalgia is 'presentation of the past as the time before the audience was born. The plots typically return to the world of myth' (ibid., p. 13), full of fantasies and romanticism, and sometimes people regard the time period as the golden age. In this case, such indirect memories are very much idealised and the positive aspects of the era are particularly emphasised. Thus, *Historical Nostalgia* is an imaginative recreation of the idealised past that the nostalgic subjects have no direct experience of. *Personal Nostalgia* is distinguished from historical nostalgia through its most important characteristic that it is derived from memories or experiences from one's own past, 'anywhere from ten to seventy years before "now"'(ibid., p. 17).

Real, Simulated and Collective Nostalgia

Baker and Kennedy (1994) classify nostalgia as real, simulated or collective. *Real Nostalgia* is very similar to what Davis called 'true nostalgia' and Stern termed 'personal nostalgia', and is based on direct personal experience. It is believed to characterise the most vivid and intensive emotional reactions. *Simulated Nostalgia*, like the historical nostalgia in Stern's classification, refers to the affective yearning for the indirectly experienced past. Here Baker and Kennedy particularly emphasise that this level of nostalgia 'may be evoked because a loved one did actually experience the times being depicted or by actually being with them when they relived the times' (ibid., p. 171). Finally, there are some past experiences shared by a culture, a generation, a society or a nation, and *Collective Nostalgia* is conceptualised as being based on this kind of shared experience or collective nostalgic memory. Collective nostalgia 'is not an individualistic notion, rather, it is a collectivistic notion which makes the emotion more consistent between individuals of a similar background when it is presented in the same context' (ibid., p. 171).

Personal, Cultural, Interpersonal and Virtual Nostalgia

As shown above, consumer researchers usually categorise different types of nostalgia according to the differences of time scale or the memory sources. Along with such efforts of classifying and determining the scope of nostalgia, two dimensions of the memory sources of this emotion have emerged: ***Individual (or personal)*** versus ***Collective,*** and ***Direct*** versus ***Indirect***. ***Individual Experience*** is 'based on memories that are specific to the individual and differ significantly across people', whereas ***Collective Experience*** is 'grounded in cultural events or phenomena that members of a group share'. ***Direct Experience*** 'refers back to events in the individual's own life', while ***Indirect Experience*** 'results from stories told by friends or family members or from information in books, movies, or other media' (Holak, Matveev, & Havlena, 2008, p. 173).

Holak and Havlena (1998) develop a more comprehensive classification of nostalgia based on the two dimensions of the sources of nostalgia. ***Personal Nostalgia*** is based on the individual's own uniquely lived nostalgic memories and differs significantly across individuals. For example, I associate many of my happy childhood memories with my first bicycle that was uniquely designed and built by my father and uncles. A recent encounter with the bicycle definitely evoked my personal nostalgia, but it might mean nothing to someone else. ***Cultural Nostalgia*** involves directly experienced and positively remembered past times that are shared by members of a specific group. For instance, if the first bicycle of many people in a society was the same make and model, this particular model or brand could become a memento of a cultural nostalgic memory across this entire group. ***Interpersonal Nostalgia*** refers to nostalgic experience based on interpersonal communications concerning the nostalgic memories of others, especially loved ones. For example, to own a classic three-gear Raleigh bicycle was a childhood dream of my father's. He remembered this and told me many of his childhood anecdotes that happened in relation to this particular model of bicycle. I had no direct memories about Raleigh, but when I saw a Raleigh bicycle in a department store in Helsinki, I had a peculiarly positive emotional reaction (i.e. interpersonal nostalgia) to this brand and eventually I bought one. ***Virtual Nostalgia*** can be seen as 'virtual reality, with collective emotion based upon shared indirect experience' which people might acquire from books, films or other media (Holak, Matveev, & Havlena, 2008, p. 173). In this sense, for example, the Moulton bicycle can be considered part of my nostalgic fantasy related to mid-20th century British design, though I only became familiar with the image and stories of Dr Alex Moulton and his Moulton bicycle from secondary sources of text, photographs and videos on the Internet.

1.5.2

Defining the Scope of Nostalgia

Potentially, the previously reviewed categorisations of nostalgia could, to some extent, all be used as frameworks for the current research. However, they all tend to oversimplify the ambiguity and complexity of nostalgia. Thus, I would like to provide an improved classification of nostalgia for the current research and specify what types of nostalgia I have mainly investigated (i.e. true and vicarious nostalgia) and in what manner (i.e. collective or cultural).

A Nostalgic Memory Timeline

As shown in the review of existing classifications of nostalgia, all of them, except for Davis' classification, involve underlying considerations of the difference between the sources of nostalgia – different kinds of nostalgic memory (i.e. individual vs. collective, direct vs. indirect). Indeed, a person is unable to have nostalgic experience without having an idea about how the past used to be.

Firstly, let's put the issue of individual vs. collective dimension aside and focus on the direct vs. indirect dimension. Here we go back to whether the positive experience that results from indirect memories or knowledge, acquired only through media and communications with others, can be called nostalgia. Most consumer researchers include the positive feeling for a bygone era before one was born within the scope of nostalgia. By contrast, most sociologists and psychologists insist that nostalgia can only be derived from a directly experienced past. My answer is yes and no. When dealing with this question, researchers tend to divide direct and indirect memory by a very specific boundary on the timeline, which is the time of birth of the nostalgic subject. Accordingly, two different types of nostalgia are defined based on direct and indirect memory respectively (i.e. personal and historical; real and stimulated; personal and interpersonal; cultural and virtual). However, I find this separation to be both oversimplified and problematic. If we examine nostalgic memory as the sources of nostalgia on a timeline (see Figure 2), different types of nostalgia and relevant experiences are not isolated entities, but form a spectrum with blurred boundaries in between.
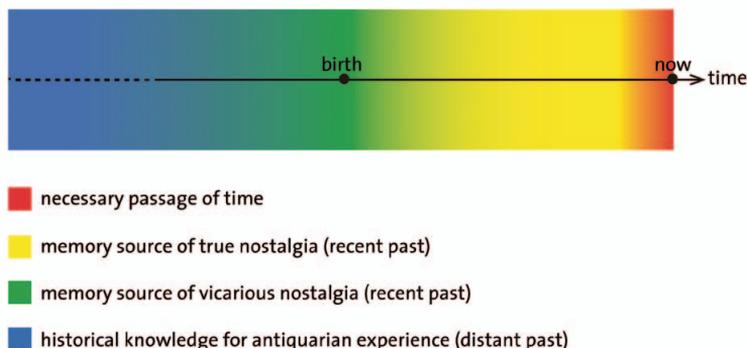
Figure 2. A timeline of nostalgic memory and historical knowledge

On this timeline, two points can be specified – **now** and the nostalgic person's **time of birth**. Looking back in time from the 'now' point, the first concept that emerges is the **necessary passage of time for nostalgia** (the red area). How far in the past does the memory have to be before it can serve as a valid source of nostalgia? Regarding a similar concern, Stern (1992, p. 17) believes that one might have to go back around 'ten' years. However, I prefer Davis' argument (1979, pp. 11-12) that 'the ability to feel nostalgia for events in our past has less (although clearly something) to do with how recent or distant these events are than with the way they contrast – or, more accurately, the way we make them contrast – with the events, moods, and dispositions of our present circumstances'. Considering the increasing speed of change in our contemporary world, contrasts between past and present can easily become or be perceived to be remarkable. Thus it is reasonable to believe that the necessary passage of time for nostalgia is generally decreasing, but varies between different individuals in different situations.

Further to the left on the timeline, the yellow colour represents **the memory source of true nostalgia**. It is the nostalgic subject's personally lived, directly and positively remembered past that is already perceived to be distinctive enough from the present to stimulate nostalgic experience. Next to it, the green area represents nostalgic memory constructed through all kinds of media and communications with the older others, as **the source for vicarious nostalgia.** It includes not only knowledge about what happened during the years or even decades before one's birth, but also the directly experienced, but not directly remembered past, in one's early years of life. Apparently, immediately after a baby is born, he/she starts experiencing the world. However, as an adult, one hardly remembers or recalls anything about what one directly experienced during the first two or three years of life. The phenomenon of 'infantile amnesia' was first identified by Freud (1900, 1914)

and has been validated by numerous empirical studies, conducted across various cultures and through different techniques for over a hundred years (Bauer, 2006, 2014; Henri & Henri, 1895; Josselyn & Frankland, 2012; Nelson, 1993; Peterson, 2002). The memories of those very first years are usually reacquired, reconstructed and reinforced later by media and interpersonal communications with the parents, older siblings or friends. A similar nostalgic memory learning process also applies to the process of getting to know what the past was like, possibly as long ago as decades before one's birth. Typically, these constructed nostalgic memories do not go very far back in time, so the nostalgic person would feel the time period is somehow relevant enough to his/her personal life, both culturally and emotionally. For example, one may feel vicarious nostalgia based on the stories one's father tells about his youth. Such a feeling of relevance, as mentioned by Baker and Kennedy (1994, p. 171), may derive from the fact that 'a loved one did actually experience the times being depicted' or one was actually 'with them when they relived the times'.

Not all the positive emotions associated with the past are considered nostalgia in this research. Qualified nostalgic experience can only be evoked by nostalgic memory (of the recent past), and nostalgic memory is only about the ***recent past***. It is impossible to provide a universally correct and specifically defined span for the concept of the recent past, as it is both subjective and complex. Nevertheless, the yellow and green areas in the timeline and their blurred boundaries with neighbouring areas can together be viewed as nostalgic memory of the recent past, which is the source of both true and vicarious types of nostalgia.

As a confusingly similar experience of nostalgia, ***antiquarian experience*** is a special liking or positive response to some periods of the ***distant past*** (the blue area in the spectrum) derived from one's historical knowledge. It is often evoked when, for example, one is able to experience, in a historical museum, aspects of a glorious historical event or era that happened hundreds or thousands of years ago. Antiquarian experience often involves such positive aspects as feeling proud of one's national tradition and heritage. Davis (1979, p. 8) uses the following to distinguish nostalgia from what he calls 'antiquarian feeling':

> *'One may, for example, feel a powerful identification with the American Revolution, be extremely knowledgeable regarding it, and even entertain a strong wish to have lived then rather than now. But can one feel nostalgia for it? Of course, there are those who insist that this is precisely what they feel, going so far as to claim that their yearning for the period of Washington and Jefferson is every bit as vivid and intimate as another's is for the songs and friends of his youth. Who are we to dispute the claim, especially since in matters*

of feeling words to a considerable extent can be made to mean whatever one wants them to mean? … For now, however, I believe it is still the case that most speakers would assign a story-derived enchantment with Revolutionary America to a different category of experience from the one they reserve for fondly remembered material from their own lives.'

Likewise, I would not use nostalgia to explain the intensely positive feelings that I had when I was visiting Blackwell, an amazingly well preserved British Arts and Crafts house finished in 1900. For me, it was more like excitement about being able to experience some charming and exotic aspects of traditional British design culture and to add direct experience to what I had learnt from reading design history books in China years ago. Nonetheless, the boundary between vicarious nostalgia and antiquarian experience cannot be precisely delineated, in the same way it cannot between the recent and distant past. Moreover, the same trigger can often evoke both nostalgia and antiquarian experience simultaneously; this may help to explain why nostalgia and antiquarian experience are rarely clearly differentiated. To continue with the Blackwell case, after I left the country, the photos of the Arts and Crafts house became not only valued visual materials of one of my favourite historical design eras, but also an important trigger of nostalgia for my wonderful time in England. What I really feel nostalgic about are the positive aspects of my lived past in England, rather than the 1900s British upper class lifestyle, the Arts and Crafts design style or anything from that distant era. In this particular case, it is perhaps easier for me, as a Chinese, to separate these two experiences than it would be for an Englishman who grew up in a family with a great Arts and Crafts collection. When he reviews the history of the Arts and Crafts Movement, his childhood nostalgia is very likely to be evoked and closely intertwined with the antiquarian experience, and thus he would claim he is able to feel nostalgic about the 1900s. Indeed, it is sometimes very difficult to differentiate nostalgia from antiquarian experience without an intensive cognitive process.

This may also involve a common confusion between the ***object of nostalgia*** and the ***cause of nostalgia***. As with other emotions, nostalgia has its object and cause and the distinction between them may often be subtle. The object of nostalgia refers to that which the nostalgic person is actually nostalgic about. The cause of nostalgia (i.e. mementos of nostalgic memories) is the trigger or catalyst, which reminds the nostalgic person of his/her memories and in turn evokes the emotion. Looking back much further in time, around two thousand years ago, for example, it is unlikely that someone would claim that the positive feeling of mentally re-experiencing the Roman Empire is equivalent to emotionally recalling cherished childhood memo-

ries, even when they occur at the same time. In addition, can a story that is set in the future make someone nostalgic? If so, is the story the object or cause of nostalgia? Science fiction novels usually position the story backgrounds in various future scenarios that may or may not happen. Compared to history or even fictional past scenarios, it is clear that future scenarios are not the objects of nostalgia but causes. For example, years after reading a science fiction novel, to reread it or watch a film based on it could evoke nostalgia. If nostalgia occurs, the contents of this novel are the cause of nostalgia rather than the object of it. What the reader really feels nostalgic about is actually the meaningful and cherished aspects of the personally lived past when he or she read the novel for the first time.

The Scope of Nostalgia in this Dissertation

As explained above, I do not consider positive emotion towards a distant past based on one's historical knowledge to be a proper type of nostalgia. Therefore I exclude antiquarian experience (the blue area) from the scope of the research. The focus is only on true nostalgia (the yellow area), vicarious nostalgia (the green area) and all the boundary areas. They can be loosely considered nostalgia for the recent past when combined, though the line between the recent and distant past differs case by case and cannot be clearly drawn.

Individual and Collective Nostalgic Memory

In the existing classifications of nostalgia, the individual vs. collective nature of nostalgia is discussed in terms of two distinct types of nostalgia derived from individual nostalgic memory and collective nostalgic memory, respectively. Again, I am not satisfied with such a separation, as every nostalgic memory can be collective as well as individual. Whether a particular nostalgic experience under investigation is individual or collective depends on which perspective the researcher examines it from.

Nostalgia can be peculiarly private; what is nostalgic for someone may leave another indifferent (Daniels, 1985). On the other hand, nostalgic memory is formed in a social context and nostalgia is often experienced collectively among people who recognise the same symbolic objects and share similar nostalgic memories. Davis (1979), for the purposes of his research, classified nostalgia according to different levels of cognitive involvement in nostalgic experience; in spite of this, he also noted the interesting relationship between what he called *private nostalgia* and *collective nostalgia*. Specifically, he asserts that these two types of nostalgia overlap and are interwoven in the experience, and we cannot draw a sharp line between them in reality.

*A nostalgic summoning of "everybody's favourite song from 1943"
(essentially a collectively oriented symbol) may inwardly shade off
into some very private reminiscences of a particular romance in
a particular place on a particular day, replete with special fra-
grances, sounds, and visual traces. Conversely, the nostalgic recall
of a favourite friend's facial expression and speech mannerism
may be suffused with equally evocative memories of the era's cloth-
ing fashions, popular diversions, and political happenings (e.g.,
the Army-McCarthy hearings, the protest marches of the sixties)*
(Davis, 1979, p. 124).

In line with such a view of the relationship between individual and collective nostal-
gia, I would like to argue further that individual and collective nostalgia should not
be understood as polar opposites, but rather as two inseparable essential attributes
(individuality and collectiveness) of nostalgia that coexist interdependently within
this experience. In other words, there is a 'one in many, many in one' interdependent
relationship between them. In order to better understand this, we shall look further
into the concepts of individual and collective memory and their interrelationships.

It is reasonable to assert that memory is fundamentally individual, since 'con-
sciousness and memory can only be realised by an individual who acts, is aware, and
remembers'. (Funkenstein, 1989, p. 6). Particularly from a biological and psychologi-
cal perspective, human memory is a mental faculty that exists only in the individual
brain or mind. In addition, it is also impossible for individuals to have exactly the
same memory of one event, even if they all directly experience it. There are always
some details in memory that should be considered unique to the individual. In fact,
I doubt whether there was any discussion about the concept of 'individual memory'
before 'collective memory' was invented. The concept of individual memory makes
sense only when compared with collective memory as a relative concept.

Originating in the seminal research works of Halbwachs (1941/1992), the con-
cept of collective memory shifted or extended (to be more precise) our view of
memory from a merely biological to a sociocultural perspective. The identification
of the collective memory concept established connections between memories and
social groups (e.g. families, professional associations, religious communities and
nations.). Halbwachs (1941/1992) asserts that every group develops a collective
memory of its own past, which is preserved and utilised to maintain its continuity
and unique identity. In this sense, memory is socially constructed. 'It is, of course
individuals who remember, not groups or institutions, but these individuals, being
located in a specific group context, draw on that context to remember or recreate
the past' (Coser, 1992, p. 22). 'Our personal memories are generated in a milieu of

social proximity, regular interaction, common forms of life, and shared experience' (Assmann, 2008, p. 213). In line with this argument, many cultural theorists further reject the significance of individual memory, and claim 'there is no such thing as individual memory' (Schudson, 1995, p. 346). However, it should be noted that Halbwachs (1941/1992) also insists that to separate individual from collective memory is provisional. Consequently, taking the collective memory concept into account should be seen as a way to understand the dynamic and relativistic relationship between the individuality and collectiveness of memory. Although a person lives their life as an individual, they simultaneously belong to numerous social groups that are delimited by time and space, and therefore the individual memory contributes to and comprises numerous collective memories. Hence, every memory is essentially collective as well as individual.

Likewise, a similar relationship also exists between individual and collective nostalgia. Accordingly, it may be more appropriate to understand when, or under which research context, a nostalgic memory is individual or collective rather than whether it is simply individual or collective in nature. A researcher may look into nostalgia through two different lenses – the *individuality* or *collectiveness* of nostalgia. Through the lens of collectiveness, the researcher better demonstrates a relatively more abstract structure of a group of people's nostalgia in a given sociocultural context (top down view), whereas through the lens of individuality the researcher better collects relatively more concrete details of nostalgia that differ between individuals (bottom up view). Nostalgia may be considered to be collective when a specific group delimited in time and space is predefined as the subject of the study. For instance, when focusing on the nostalgic memory of music shared by people who grew up in the 1980s in the UK, the use of the Sony Walkman and cassette tapes to enjoy music is a collective nostalgic memory for many. But it cannot be merely collective, since individual members of this cohort remember the details differently and thus each of them has his or her own version of the nostalgic memory. On the other hand, nostalgia may be viewed as individual when a particular person is selected to be a research subject. For example, when studying a famous forty-year-old singer's nostalgic memory of how he fell in love with music in his early life, all his personal stories better illustrate the individuality of nostalgia, even though the historical devices that he used to listen to music (e.g. Walkman and cassette tapes) and the performers who mostly influenced him at the time, are apparently not only in his nostalgic memory. Consequently, the individual vs. collective issue of nostalgia very much depends on the manner by which the researcher investigates the experience.

Cultural Nostalgia:
Examining Nostalgia from a Collective Perspective

One of the primary concerns that designers have to consider at an early stage in the design process is whom they are designing for. The target group may vary from an individual customer to a mass market. For two reasons, I am particularly interested in examining nostalgia from a collective perspective for a mass market. Firstly, as being able to share is identified to be one prerequisite for positive nostalgia, nostalgic memories that are shared by a large group of people therefore greatly ensure the positive quality of this experience. Secondly, such a view of nostalgia also offers opportunities to tap into the positive social impact of designing for nostalgic experience, which have been long confined by the design community's conservative understanding of nostalgia. Nonetheless, it does not mean individual nostalgia is entirely excluded, as it is impossible to do so. I conducted nine case studies in total for different research purposes of this doctoral research. As crucial data, the nostalgic narratives collected through interviews with designers and users were indeed very personal and private, which strongly evidenced the individuality of nostalgia. But, at the same time, they were collected under a predefined collective structure of nostalgia, which ensured that collectiveness was the primary perspective of this doctoral research. Furthermore, 'from a collective perspective' also means that I focus on nostalgia shared by groups with numerous members (e.g. a generation of a nation). As previously suggested, all nostalgic memories can be considered collective, because they are socially mediated and relate to a variety of groups. However, the size of these groups differs considerably. One's overall nostalgic memory can be seen as an assortment of the collective nostalgic memories of different social groups that one belongs to, which can be as small as two people and as big as the age cohort across the world. For the sake of convenience in communication, I use a simple term, *'cultural nostalgia,'* to refer to the mode of nostalgia that I will discuss in the following chapters. Despite its conceptual difference from the foregoing 'cultural nostalgia' in the typology of Holak and Havlena (1998), this term is the most germane one I could think of to concisely express the scope of nostalgia and have thus studied it from this perspective.

1.6
Conclusion

I have used this chapter to review the changing concept of nostalgia, to redefine it for the current dissertation and to clarify the scope of nostalgia and the perspective from which I have studied it in this doctoral research.

Firstly, the concept of nostalgia had a dramatic history of evolution from abnor-

mal to normal, and from negative to positive. From the 17th to the 19th century, the term 'nostalgia' was used to name a medical (neurological) disease. It was later considered to be a mental disorder, and subsequently the main focus of research shifted from medical studies to psychiatry towards the end of the 19th century. By the latter part of the 20th century, nostalgia had lost all its disease-related connotations and quickly expanded into many different culture-related areas including music, film, sociology, psychology, history and consumer research. In addition, over the three centuries, the population susceptible to nostalgia, as understood by researchers, extended from Swiss soldiers only to almost all adults and teenagers. Currently, researchers have inherited a very different understanding of nostalgia from its original definition. Nostalgia is a common human experience or preference. This experience is complex, and often has both positive and negative components, but the positive characteristics predominate. It gains meaning in social and cultural life, and is therefore often considered as a social emotion or manifests as a sociocultural phenomenon. Given the fact that our memories are highly selective, nostalgia is not based on absolutely accurate memories but only positive and idealised ones. There is a broad range of objects that could be the stimuli of this experience. Nostalgia is an important source of positive emotions in daily lives, and the latest psychological studies suggest that it serves many significant existential functions, and contributes to psychological and physiological wellbeing.

Interestingly, before the 1970s, a positive view of nostalgia was almost unheard of in terms of scientific research. How did the concept and the actual experience of nostalgia change so abruptly from a disease, a mental disorder, and a generally negative experience, to a positive experience that promotes human wellbeing? By clearly differentiating (remembered) nostalgic memory from (immediate) nostalgic experience, I proposed a new definition of nostalgia and a new perspective to view nostalgia as a conditional concept. Nostalgia (or nostalgic experience) is the combination of emotional reactions engendered by the recall of nostalgic memory. In this definition nostalgic memory is always a positively remembered experience. But, whether nostalgic experience occurs as a negative or positive affect-dominated experience depends on the circumstances under which nostalgic memory is retrieved. Three conditions respectively determine whether nostalgia is needed, in which affective tone nostalgia is experienced, and how intensive it is. Firstly, nostalgia occurs only when the nostalgic person perceives a significant contrast between the present and a past time that is positively remembered. Secondly, when a nostalgic memory is recalled, whether or not it is possible to share the nostalgic memory with relevant others immediately or in the foreseeable future greatly determines whether the nostalgic experience is positive or negative. Thirdly, available mementos of nostalgic memories (e.g. photographs, videos, artefacts, services) serve as the

catalyst of both positive and negative nostalgia.

Seeing nostalgia in this way, I then suggested that the reason for its conceptual change is because the circumstances under which people recall their nostalgic memories have profoundly changed, from preindustrial society to postmodern society. Firstly, due to increasingly rapid changes over the past three centuries, people have feelings of discontinuity much more frequently today than in the 1700s, and this in turn has caused an increasing need to recapture a positively remembered past (i.e. nostalgia need) on a global scale. Secondly, the comparatively recent development of digital media, information and communication technologies has provided more convenient ways for people to connect with each other, with a decreasing barrier of spatial distance. Thanks to this, people currently often find themselves able to fulfil their nostalgia needs mentally, by conveniently sharing nostalgic memories with relevant others. Thirdly, abundant tangible mementos of nostalgic memories (e.g. obsolete products) can be reacquired through online or offline second-hand markets. Intangible ones (e.g. photos and videos) are well digitised, archived, and easily accessible for everyone in today's hyper-connected world. It has made nostalgia more enjoyable than ever before. Thus, the contemporary nostalgic experience is much more likely to be an experience with the nostalgia need being totally fulfilled, and therefore a positive experience. The positive nostalgia remarkably contrasts with the negative nostalgia, which was typically characterised by unfulfilled nostalgia need unfulfilled and painful realisation of the irreversible positive past.

In order to be clear about the scope of nostalgia in this research, I have reviewed four different ways of classification of nostalgia in the latter part of this chapter. However, none of them has provided a good structure to guide the current research. Thus, I have developed a new classification, in which two types of nostalgia (i.e. true nostalgia and vicarious nostalgia) and one confusing experience (i.e. antiquarian experience, a special liking for or positive feeling for a distant past) based on different sorts of memory on the timeline (i.e. direct and indirect memories of the recent past and historical knowledge of the distant past) are differentiated. Though they can be classified as such, the boundaries between them are vague and may differ case by case.

In addition, I have also stressed that the individuality and collectiveness of nostalgia are two essential, interdependent attributes of this experience. Which one manifests more positively very much depends on the view from which the researcher studies nostalgia. Specifically, the chapters that follow will revolve around cultural nostalgia, meaning I will only discuss true and vicarious nostalgia primarily from a collective perspective. Nevertheless, the primary focus on collectiveness does not mean that I ignore individuality. In fact, the empirical studies presented in Part II will clearly demonstrate that it is impossible to empirically study a collective con-

cept (i.e. cultural nostalgia) without primary data that are full of individuality (i.e. the informants' personal nostalgic narratives). The primary focus on the collective-ness of nostalgia (or cultural nostalgia) is guaranteed by taking a predefined group specifically delimited in time and space as the subject of study.

Chapter 2

Design and Nostalgia Waves

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2.1

Introduction

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When examining nostalgia from a collective perspective, its contemporary meaning appears to be full of social and cultural attributes. Nostalgic experience often becomes desirable among the public in certain historical periods, and it can be collectively evoked through interactions with the mementos of nostalgic memories that are well known to the members of a particular group or society. As a result, nostalgia often manifests as a recurrent sociocultural phenomenon. Davis (1979) calls this phenomenon 'nostalgia boom' (p. x), 'tides of nostalgia' (p. 57) or most commonly 'nostalgia wave' (p. 107). Accordingly, Davis summarises the discussion of the sociology of nostalgia in terms of being 'concerned with tracking down the sources of nostalgic experience in group life and determining what general relevance and meaning nostalgia has for our present life and, somewhat more abstractly, what consequences it has for society as a whole' (1979, p. vii).

This chapter situates nostalgia in the research tradition of design and culture, and examines some remarkable regional and global nostalgia waves in relation to design. Although designers often do not want their works to be labelled as 'nostalgic', it is evident that designers have been playing a leading and strategic role in exploring the power of nostalgia for commercial profits. However, when it comes to nostalgia-driven design for social good, especially in the public sector, designers so far have lacked strategic ambition. Therefore, for the sake of both commercial viability and social good, this chapter is intended to emphasise the underlying dialectical relationship between (radical and rapid) changes, the increasing collective need for nostalgia, and nostalgia-driven design efforts that creatively combine old and new and bring lost but still cherished aspects back to the present. By doing so, I hope to encourage the design field to re-understand nostalgia from a more dynamic and forward-looking perspective, and to actively explore its potential to cope with increasingly significant challenges caused by radical and rapid changes in human societies. Three main questions will be addressed in this chapter:

(1) How are nostalgia waves formed at the regional and global levels?
(2) What role does design play in nostalgia waves?
(3) What opportunities for both commercial and social design might accompany nostalgia waves?

The chapter begins by defining key concepts that frequently appear in the discussions (**Section 2.2**). Given the argument that radical changes and the nostalgia waves are dialectically related, **Section 2.3** goes back to basics and reviews how the changes, especially radical changes, occur. On the basis of a deeper understanding of the mechanisms of change, **Section 2.4** examines three remarkable current nostalgia waves that differ in the primary forces that drive them (i.e. revolutionary political, economic and technological changes) and in their scopes of influence (i.e. East and Central Europe, China Mainland, and worldwide). **Section 2.5** narrows down the focus to the role that design has played in nostalgia waves. It analyses three nostalgia-driven design cases in response to three different nostalgia waves (i.e. the Ampelmann in Germany, The Nengmao Store in China, and C60 Redux, which is aimed at a global audience). Drawing on the analysis of the three cases, in **Section 2.6**, the accompanying design opportunities are discussed from the perspectives of both a market model and a social model of design.

2.2
Defining the Key Concepts

In order to develop the discussion and analysis without ambiguity, several key concepts first need to be clearly defined. Thus, I use this section to provide definitions of six key concepts that are discussed in this chapter and which may also appear in the following ones: Nostalgia Wave, Cultural Nostalgic Memory, Cultural Nostalgia, Mementos of Cultural Nostalgic Memory, (Cultural) Nostalgia-driven Design and Cultural Identity.

A ***Nostalgia Wave*** is a sociocultural phenomenon in which earlier significant changes in a society cause collective life discontinuity and cultural identity crisis, which in turn boost the mass desire for nostalgia. As a response to the exploding public desire for nostalgia, an increasing number of cultural offerings (e.g. literature, mass media programmes, films, tangible artefacts, services, brands) that are intended to evoke nostalgic experience are being created and currently enjoy great popularity. There are three key components of a nostalgia wave: 1) ***the earlier significant changes in society***, 2) a subsequent ***increase in the collective need for nostalgia*** and 3) ***the flourishing of nostalgic cultural offerings***. We might not be able to directly observe the increase in collective need, since it is an intangible psy-

chological demand. However, it can be suitably demonstrated by the proliferation and great popularity of those cultural offerings that are aimed at evoking nostalgic experience. In this dissertation, I often use the term 'nostalgia wave' in a plural manner, which is rare in previous literature because a nostalgia wave has been typically studied previously as a phenomenon occurring in only one specific region (e.g. the 1970s nostalgia wave in America), whereas I try to examine several contemporary nostalgia waves in different regions from a cross-cultural perspective.

A collective memory is a memory that is shared by a group that may be as small as a couple or as big as the whole human race. Within the current research context, a *Cultural Nostalgic Memory* refers to a special type of collective memory, and it is the basis of the nostalgia wave phenomenon. It is nostalgic because it is positively remembered, evokes nostalgic experience and warms one's heart. To qualify and name this particular type of nostalgic memory 'cultural' is to stress the great scope of both its influence and the population being affected, such as one or more generations of a country or across the world (due to the globalised and well-connected world). Therefore, a cultural nostalgic memory is proverbially shared, positively remembered, culturally cherished and valued by a group or society with a large number of members.

It should be noted that, as stated in Chapter 1, cultural nostalgic memory can only be conceptually and temporarily separated from *individual nostalgic memory* for research and intellectual discussions. Individuals' nostalgic memories, as part of a cultural nostalgic memory, are formed in social contexts and evoked by commonly recognised mementos and communication with others. On the other hand, cultural nostalgic memory would not exist without these very personal nostalgic memories in each relevant individual's mind. In this regard, there is an interdependent 'one in many and many in one' relationship between cultural nostalgic memory and individual nostalgic memory. Therefore, a cultural nostalgic memory can be seen as a relatively abstract collective structure or framework that represents the commonalities of individuals' nostalgic memories, whereas each individual's nostalgic memory provides rich private details on the basis of the collective structure. The differences between individual nostalgia and cultural nostalgia reside only in which one is temporarily selected as the primary perspective for a given study. In fact, a comprehensive understanding and discussion of nostalgic memory (or nostalgia) as a whole can only be achieved through constantly bearing in mind the interdependent relationship between individuality and collectiveness. Thus, it is more appropriate to consider the concept of *Cultural Nostalgia* in this dissertation as a means to define the perspective, focus and scope of the current research.

Cultural nostalgic memory may be recollected through interacting with nostalgic cultural offerings (e.g. products, brands, services, films, music, events), or *Memen-*

tos of Cultural Nostalgic Memory in more general terms. In their societies of origin or in which they participate, these mementos of cultural nostalgic memory are normally 'what-everybody-knows' and inscribed in the members' informal social and cultural knowledge. Mementos of cultural nostalgic memory, as designed outcomes in particular, can be generally categorised into two types: the original mementos and the recreated mementos. *Original mementos* (e.g. a Sony Walkman produced in Japan in the 1980s) are those that were created in the past and retained through time up to the present. They used to be common and popular, but are no longer commonly or widely experienced today due to continuing technological, political, social and cultural change. *Recreated mementos*, in contrast, are newly created and involve a design process and strategy. They are normally creative combinations of valid cues of cultural nostalgic memories and some new elements that are more relevant to contemporary life. In this sense, the design process or strategy that takes (cultural) nostalgia as the intended primary (customers, users or audiences) experience can be termed as *(Cultural) Nostalgia-driven Design.* Please note, as I have repeatedly stressed the collective or cultural perspective of this research, in order to avoid pleonasm, I will use 'nostalgia-driven design' instead of 'cultural nostalgia-driven design' in the following writings to address such a design process or strategy.

The issue of identity is closely related to the phenomenon of the nostalgia wave. Identity is often considered to mean 'people's source of meaning and experience' (Castells, 1997, p. 6). 'For besides being defined by our immediate circumstances, we are defined by our pasts and our futures' (Belk, 1990, p. 669). In this regard, sense of identity is extremely important to every person and group, as Gergen (1991, p. 38) states that 'in the social jungle of human existence there is no feeling of being alive without a sense of identity'. Identity is a multi-layered concept. Specifically, a nostalgia wave, as a collective manifestation of nostalgia, has a closer relation with, and greater impact on, the construction and maintenance of the cultural identity of a given society.

Jameson (2007, p. 207) defines *Cultural Identity* as 'an individual's sense of self, derived from formal or informal membership of groups that transmit and inculcate knowledge, beliefs, values, attitudes, traditions, and ways of life'. Though cultural identity is a collective concept, it exists in individuals' subjective minds. In comparison with objective identity, which comprises the facts shown on the official certificates of a person (e.g. passport), subjective identity refers to how individuals subjectively believe who they are. Subjective identity can be further divided into personal identity and collective identity (Triandis, 1989). *Personal Identity* comprises one's unique elements (e.g. personality and unique aesthetic preferences) that differentiate the individual from others who share a similar background (Ting-Toomey, 2005). *Collective Identity* is made of 'the sense of self derived from for-

mal or informal membership in groups' (D. A. Jameson, 2007, p. 207) and it can be further separated into two relevant but different types – **Cultural Identity** and **Social Identity**. 'Cultural identity involves historical perspective, focusing on the transmission of knowledge and values between generations, whereas social identity is often anchored in a particular moment in time … Social identity concerns what roles people play in the present; cultural identity concerns, in addition, what people have learned in the past and how they plan to influence the future' (ibid., p. 207).

All six of the concepts defined and introduced in this section play significant roles in the subsequent discussions in the current chapter and the ones that follow. These concepts are complex, and may be understood differently in different fields of research. Hopefully, this section has built a concrete common ground for discussing and communicating.

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2.3

Models of Change

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It's not the progress I mind, it's the change I don't like. – Mark Twain

Change is the ultimate force for nostalgia need and desire at both individual and societal levels, for if nothing changes, there would be absolutely no nostalgia needed. But the fact is that the objective world and also our subjective minds never stop changing – as stated by Heraclitus, 'the only thing that is constant is change'.

Evidently, radical and rapid changes increase nostalgia need. As pointed out by many sociologists (e.g. Boym, 2001; F. Davis, 1977, 1979), some years after a revolution or radical change in a society, the public tendency to re-experience the 'good old days' typically intensifies. When a society is in the transitional period, individuals in the society inevitably have to face significant changes in their own lives. As a result, they are more likely to experience the consequent feeling of discontinuities and cultural identity crisis. Therefore, it makes sense that nostalgia, as a 'versatile homeostatic corrective' (Zhou, Wildschut, Sedikides, Chen, & Vingerhoets, 2012, p. 683), is more in demand to serve its functions in a society where revolutionary changes happened earlier. Similarly, Davis (1977) conceptualised the nostalgia wave of the 1970s in the US as an adaptation and balance-reacquisition mechanism to the earlier, radical societal changes in the 1960s.

Nevertheless, it seems that the nostalgia wave is not a phenomenon that is limited only to societies that recently had profound revolutions (e.g. China's economic revolution), but is also broadly observable in most, if not all, contemporary societies. Indeed, new technologies and cultural movements have been rapidly and continuously transforming the world into a different planet. This has encouraged me

to also look into how nostalgia is connected with the continuous and accelerating changes that are generally discussed in the fields of management and future studies.

In order to facilitate a systematic and fruitful examination of contemporary nostalgia waves, a better understanding with respect to change is necessary, especially through two important models of change, namely punctuated equilibrium and continuous change.

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2.3.1

Punctuated Equilibrium

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Change and how it happens have been a fascinating research topic in many different fields. For example, the *Evolutionary Model* of Darwin (1859) assumes that changes gradually occur and accumulate over time. It was originally developed to explain biological changes throughout the history of earth, but such a way of thinking has been pervasive and influential in many other fields. *Punctuated Equilibrium*, on the other hand, is a relatively recent model, which in a way challenges Darwinian gradualism. This model was originally proposed by palaeontologists Eldredge and Gould (1972) as an alternative explanation to the fact that the observable fossil record does not match predictions based on the evolutionary model. It has been also adjusted to be an influential general model of change in many other fields. In the punctuated equilibrium model, the process of change goes on with two contrasting and never-ending periods – 'relatively long periods of stability (equilibrium), punctuated by compact periods of qualitative, metamorphic change (revolution)' (Gersick, 1991, p. 12).

The relationship between these two modes is mainly understood through a concept called *'deep structure'*, which is 'the set of fundamental "choices" a system has made of 1) the basic parts into which its units will be organized and 2) the basic activity patterns that will maintain its existence' (Gersick, 1991, p. 14). Of course, change never stops, even during the equilibrium periods. A system in its equilibrium periods undergoes incremental changes, but leaves its deep structure intact, and therefore may be considered relatively stable. By contrast, in the revolutionary periods, radical changes occur in which the deep structure is disassembled and the system is temporarily disrupted. Then, 'a subset of the system's old pieces, along with some new pieces, can be put back together into a new configuration, which operates according to a new set of rules' (Gersick, 1991, p. 19). Though a punctuated equilibrium pattern can be found in the changing processes of all kinds of systems, it should not be assumed to be the only way that systems change. That said, it provides a useful lens for studying change-related issues when such a model is more suitable.

When connecting this model of change to the phenomenon of the nostalgia wave,

an equilibrium period may be seen as a relatively long and stable period, during which a society forms its particular cultural identity and cultural memory under a given deep structure. When a revolutionary change commences, the existing deep structure is broken to enable a new one to be established. At the end of the revolutionary period and the beginning of the next equilibrium period, the society needs to critically reintroduce old aspects that are still valued and merge them with new ones to keep a comfortable level of continuity, reconstruct its cultural identity, make a new deep structure and eventually achieve a new balance. The functions of cultural nostalgia can become very helpful for this purpose, and may explain why the increasing need for cultural nostalgia is often one of the key features of individuals or societies in the transitional period.

2.3.2

Continuous Change

More recently, as we enter the *Information Age*, many researchers claim that even the 'nature of change seems to be changing' too (Marshak, 2002). The Information Age roughly began in the 1970s, when wider human society started to work with computers and networks, constantly adjust to new technologies and deal with increasing flows of information (Castells, 2011). One of the crucial features of the Information Age is that 'Connectivity, Speed, and Intangibles — the derivatives of time, space, and mass — are blurring the rules and redefining our businesses and our lives' (S. Davis, Davis, & Meyer, 1998, p. 6). Continuous change is a model associated with the Information Age, mainly advocated by organisational change researchers. It is believed that the external environments are currently changing in an accelerating and unpredictable manner, and thus 'the ability to change continuously is a critical factor in the success of firms' (Brown & Eisenhardt, 1997, p. 2). Continuous change often takes place in companies through rapid product and service innovation; by doing so, the companies ultimately transform themselves (ibid.). To some extent, the continuous change model may be understood as a special version of punctuated equilibrium, in which equilibrium periods are greatly shortened by more frequent revolutionary changes, and the well-established deep structures that ensure long equilibrium periods are replaced by semi-structures that provide partial order and ensure a system lies between stability and chaos. The continuous change model may be well utilised to understand why and how nostalgia has become a global phenomenon across almost all contemporary societies.

2.4
The Current Nostalgia Waves
and Their Drivers

The scale of nostalgia waves can vary from regional to global, and therefore two types of nostalgia wave are identified accordingly. A ***regional*** nostalgia wave occurs within a particular geographical area (e.g. a city, a country or several interrelated countries) and is caused by specific radical changes that occurred earlier within that area. In the case of a regional nostalgia wave, the cultural nostalgic memory that people share and the effective mementos are often culturally unique. Taking China as an example, the economic transition of China is broadly considered the major force behind China's current nostalgia wave, but it barely has anything to do with the nostalgia wave experienced by American baby boomers. *Li Lei* and *Han Meimei* were two fictional characters in the unified English language textbooks that were used by secondary schools across Mainland China in the 1990s. It is unlikely that any non-Chinese knows anything about Li Lei and Han Meimei, but mentioning the names to Chinese who grew up in the mainland and are now in their 30s is very likely to evoke cultural nostalgia.

There are two ways to understand nostalgia as a multi-layered global phenomenon. Firstly, it seems that every region may have its own particular past that people there feel nostalgic about. The flourishing of flea markets and retro fairs in almost all major European cities (e.g. London, Paris, and Helsinki) and the strong research interests of American consumer researchers in the nostalgia preferences of different domestic consumer cohorts both demonstrate that nostalgia is experienced on a global scale, though with a variety of different cultural nostalgic memories and mementos associated with them. This is also in line with many theorists' argument that nostalgia is one of the key features of postmodern culture in the globalised world (e.g. F. Jameson, 1991; Robertson, 1992). Secondly, beyond regional nostalgia waves, there is also an overlapping nostalgia wave affecting the worldwide population, which I name the ***global*** nostalgia wave. This type of nostalgia wave may be considered as a direct result of the joint effects of globalisation and rapid change that took place across all contemporary societies simultaneously. Since the latter part of the 20th century, the increasingly globalised media, communication and technological penetration have allowed most cultures across the world to form a global generational cultural memory, from which nostalgic memories shared worldwide can be drawn. Today's world is constantly connected and the information is immediately shared through smartphones, computers, the Internet, and social media. Obviously, this facilitates the formation of a global cultural memory. In fact, even before widespread Internet usage, Hassan and Katsanis (1991, p. 21) had already

noticed at the beginning of the 1990s that 'global teens from New York, Tokyo, Hong Kong, to those from Paris, London, and Seoul are sharing memorable experiences (through television, international education, and frequent travel)'. In addition, globally shared cultural memories may also have been formed because of increasing international trade. For instance, Pac-Man, a once popular but currently obsolete video game launched and globally distributed by the Japanese company *Namco* in the 1980s may well evoke nostalgic memories of childhood in people from both East and West who grew up in that decade. The historical boot up tone associated with earlier generations of the Windows operating system is another example of a memento of nostalgic memory that has a global scope of influence.

Currently, there are two regional nostalgia waves that stand out. One emanates from Central and Eastern Europe, namely the former Eastern Bloc countries (e.g. Russia and the former GDR) caused by the collapse of their communist political systems in the late 1980s and early 1990s. The other one pervades in Mainland China. Although China did not change its socialist political system, the country's revolutionary economic transformation from a closed planned economy to an open market economy in the 1990s rapidly and radically reshaped all aspects of the population's everyday lives. Thus, it is not surprising to witness a striking regional nostalgia wave in China too. Continuous and accelerating technological changes represent one of the most crucial forces behind the global nostalgia wave. Three types of radical change can be considered as prime drivers of the one global and two regional nostalgia waves: 1) *political change*; 2) *economic change*; 3) *technological change*.

Here I would like to make one point clear before developing the analysis. These radical changes I identify are not the only forces promoting the nostalgia waves, but represent the most notable ones, as all societal level changes may be considered part of the consolidated force underpinning a nostalgia wave. However, a small number will often stand out and are therefore considered the prime driver(s) in each case. For example, in China, many changes happened over the past decades in all social contexts, but the revision of the economic system is arguably the most profound and far-reaching. Meanwhile, most of the other changes in the same period were actually facilitated or driven by the economic transition. Therefore, I consider it the prime driver for the current nostalgia wave in China.

In the following sections, I take the two most remarkable regional nostalgia waves (i.e. in former Eastern Bloc countries and Mainland China) and the global nostalgia wave as examples to illustrate the relationship between (revolutionary) changes and their accompanying nostalgia waves. In the discussion of former Eastern Bloc countries, I have no interest in discussing the strengths and weaknesses of the socialist political system and communist ideology, but focus on the discontinuities and responsive nostalgia wave caused by the collapse of their previous political system instead.

The (Regional) Nostalgia Wave in Central and Eastern Europe

'An emotion that emerges again and again in accounts of the post-socialist world is nostalgia. In many countries large parts of the population are prone to claim, with obvious feeling, that this or that aspect of life was better before the collapse of the communist regimes' (Heady & Miller, 2006, p. 34). The nostalgia wave in former Eastern Bloc (Communist Bloc or Soviet Bloc) countries has been going on since the turn of the 21st century, so that nostalgia has been identified as one of the key features of the transitional culture shared by post-communist societies (Vihalemm & Masso, 2007; Vogt, 2005). In terms of scholarly analysis, cultural nostalgia for the positive aspects of the socialist era has become an unavoidable topic in recent post-communist studies, such as those in Russia (Heady & Miller, 2006; Holak, Havlena, & Matveev, 2006; Holak, Matveev, & Havlena, 2008; Lee, 2011; Nikolayenko, 2008; Platt, 2013; Pourtova, 2013; Shevchenko, 2002), Germany / East German Democratic Republic (Barney, 2009; Enns, 2007), Romania (Light, 2001; Popescu-Sandu, 2010), Hungary (Nadkarni, 2010), Bulgaria (Buchanan, 2010; Creed, 2010), etc.

In everyday life and popular culture, this particular nostalgia wave can be observed in various forms. In the case of Germany, a special word – 'Ostalgie' (i.e. east nostalgia) – has been created to refer to their particular cultural nostalgia for the suddenly vanished GDR. *Good Bye, Lenin!* (2003), an internationally successful film by Wolfgang Becker highlighting the post-communist nostalgia for the GDR, pushed the Ostalgie wave to its climax. Various mementos of cultural nostalgic memory of the GDR were intensively displayed in the film, and many were branded products (e.g. *Mocca Fix Gold* coffee, *Fillinchen* crisp bread, *Spreewald* pickles, *Trabant* car). To cater to cultural nostalgia for East Germany and make a commercial profit, some of these obsolete brands and products have been reintroduced in recent years. In addition, perhaps inspired by the success of this film, Ostalgie-Shows (e.g. *Die Ostalgie Show*, *Die DDR Show*) have also been broadcast by several German TV stations (e.g. Central German Broadcasting's *Ein Kessel DDR*) since 2003 (Westphal, 2005).

In Russia, a similar phenomenon can be observed as described by Pourtova (2013, p. 35):

> Today there is a proliferation of specially designed internet sites which revoke the objects, images or symbols of their Soviet or pioneer childhoods, things that belonged to that time and are now lost forever. Similarly, a number of cafés, clubs and restaurants with Soviet names (The USSR, Propaganda, etc.) or imitating the style

and interiors of the Soviet times are now becoming popular in Mos-
cow and on radio and TV channels dedicated to broadcasting films
and music of the Soviet period are being created.

Generally, cultural nostalgic elements and narratives have been utilised to express and remind people of the more attractive aspects of life in socialist times with 'soft' humour, and at the same time to reconstruct present collective identities (Viha-lemm & Masso, 2007).

Most (if not all) researchers of post-communist studies attribute the nostalgia wave in Central and Eastern Europe to the dissolution of the Eastern Bloc and Soviet Union, the collapse of their socialist political systems, and the consequent discontinuities and loss of certainties and cultural identities in ordinary people's lives. With a firm belief in communism, the Soviet Union as the world's largest socialist nation was governed by a single political party that was established in 1922 and existed for sixty-nine years. Based on the Warsaw Pact, the Eastern Bloc was formed as an alliance among states with similar socialist political systems in Central and Eastern Europe, which lasted for approximately forty-five years (from the mid-1940s to 1991). This historical period may be viewed as an equilibrium period, as these socialist countries constructed and maintained a deep structure with a politi-cal ideology that differed from that of Western capitalist countries. As a result, citizens of Eastern Bloc countries lived very different lifestyles with a distinct culture and environment compared with their western peers. The thorough political revo-lution that occurred in the early 1990s reformed almost every sociological param-eter in the former Eastern Bloc countries (Bartmanski, 2011) and it is believed to be 'the most significant political transformation of the second half of the twentieth century' (Jay, 2003, p. xvi). It might be difficult for outsiders to truly empathise with the discontinuities of life and loss of cultural identities that the citizens of those former socialist countries have experienced. Pourtova's detailed description of what happened to every former Soviet citizen may help in this sense (2013, pp. 35-36).

We, the children of the Soviet Union, have lost our home country.
When, some time ago, we exchanged our old Soviet passports for the
new Russian ones, we also lost our old identities which were formed
in the lost world of the former Soviet state. In addition, that strange
nationality, a new historical community formed by a great number
of inter-ethnic marriages in the Soviet Union and declared as the
Soviet people has disappeared as well. For many people in Russia,
the former Soviet republics represent not only the lost territory of
an enormous empire but lost personal, professional and relational

connections, as well as the ties with the past. After Perestroika, we all became involuntary emigrants. We became citizens of a different country without leaving it.

Apparently, the political revolution of former Eastern Bloc countries over two decades ago tore apart the old deep structure and started the formation process for the new one. Naturally, in the process of reacquiring equilibrium, a nostalgia wave is evident in response to all the associated changes as means of helping reduce the perceived discontinuities and reconstruct cultural identities. In that sense, an individual's experience of the nostalgia wave 'is a form of personal therapy after the shock of reunification (or revolution) as well as an amateurish attempt to regain one's interpretational powers over one's own biography' (Finger, 2005, p. 40).

2.4.2

The (Regional) Nostalgia Wave in Mainland China

Mainland China has also been immersed in a regional nostalgia wave, as evidenced recently by numerous and highly popular nostalgia-oriented cultural offerings. For instance, there have been many nostalgic television programmes running on a variety of channels in China. *The Generation Show*, which is one of the most popular weekend programmes, invites celebrities of different ages to form teams representing the 70s, 80s, 90s and 00s and play quizzes related to Chinese popular culture of the past three decades. Additionally, nostalgia for the 1980s and 1990s is also flooding the mass media, mostly via the Internet and cinemas. For example, *Chopsticks Brothers*, a Chinese pop music and filmmaking group, quickly attained fame across the country when their nostalgic short web film *Old Boys* (2010) and songs were accessed tens of millions of times soon after upload. *So Young* (2013), a nostalgic film taking a Chinese audience (especially those of the right age) back to 1990s university campus life, broke the opening-day box office record for a non-3D Chinese language film in China with RMB 45 million (Yan, 2013). In terms of contemporary art, nostalgic elements are frequently deployed. For example, Ai weiwei's famous artwork 'Forever Bicycles' is an installation composed from 1500 bicycles. These bicycles were all from *'Forever'*, a brand that almost every Chinese born before 1990s has some nostalgic memory associated with (in fact, Forever's brand revitalisation is analysed as a case study in Part II). In addition, hundreds of artworks actively and reactively dealing with the nostalgia wave in China are displayed in Beijing's *798 Factory*, the most active contemporary art zone of the country. Unsurprisingly, many young Chinese designers have also been fascinated and inspired by

their own nostalgic memories of childhood in the 1980s and 1990s, and have recycled old design elements from the planned economy period to create new fashionable products.

China's rapid transition from a planned economy to a market economy is the leading force driving the current nostalgia wave in the country. Though incremental political reforms have never stopped, China's socialist single-party political order did not change. But in economic, social and cultural contexts, the transformation has caused such a profound change that Deng Xiaoping (the former leader of China and the Communist Party of China who initiated China's economic transition) repeatedly called it 'a revolution' or 'the second revolution' (Wan & Qin, 2012). A planned economy is a system in which the central government regulates the fundamental factors of production and makes decisions regarding what to produce and how to distribute it, in terms of both consumer goods and the organisation of production (Nove, 1987; O'Connor, 2004). Though few countries nowadays operate under such an economic system, most, if not all, socialist countries implemented it before the 1990s, including China. In the early 1950s, the newly established socialist government of China adopted the planned economy system from the Soviet Union and closed the door to the Western market economic model.

The planned economy system spurred China's economic development in the beginning, but restricted its growth in subsequent decades and led to many negative consequences for everyday lives, perhaps most notably *low income* and *restricted consumption choices.* According to the World Bank's open data (2014), in the year 1980, China's per capita income (GNI per capita in PPP dollars) was approximately $280. It was less than 1/10 of the world average ($2810.05) and China was ranked as the fourth poorest country in the world. What made the situation even worse was that the consumption choices of the population were severely restricted. Firstly, the supply of consumer products was under the control of the central or local planning authority. Most types of consumer products (including clothes, food grain, and sugar, etc.) were therefore distributed through a rationing system. Every month each person would be given a fixed number of purchasing coupons that had to be used, in addition to money, to pay for products (Chow, 2007). Those who wanted to buy 'luxury' goods (e.g. a bike, watch or TV set) often had to earn 'special coupons' that were usually granted to the leaders and model workers of the year by their working units. Secondly, there were only one or two famous nationwide brands per product category. Because products offered through these brands represented the best quality and were difficult to obtain even if one had sufficient money, almost everyone knew about these desirable commodities and dreamed of owning them. Thirdly, imported products were rare and mostly from other socialist countries, and in many cases their design features were similar to those of native Chinese

brands. Finally, the population could only shop in state-owned department stores, and almost all these stores across the country sold the same limited range of products with similar functions, usages and styles at the same prices (Gamble, 2006). Under this system, products were always in short supply.

In December 1978, the Chinese government decided to end the country's international isolation and adopted the *Reform and Opening* programme. Nonetheless, the planned economy system was still considered to be an indispensable feature of socialism by the Communist Party of China. It was not until 1992 that Deng Xiaoping in his *South Tour* popularised the concept of the *Socialist Market Economy* and encouraged the government to be bolder by famously arguing that whether a planned or market economy is implemented is not the hallmark of socialism, but rather whether the system can optimise productivity and raise the living standards of the people. In October of the same year, the Chinese government declared that the objective of China's economic reform was to establish a socialist market economy and an accelerated economic reform phase began (Suliman, 1998).

As a result of the above transformation, the current Chinese population are enjoying increasingly high incomes and their consumption choices are as diverse and as high in quality as those in any other market economy. Given the incredibly successful figures of China's economic development in past decades, few economists or ordinary citizens would argue that China's transition to a market economy was a negative move. However, even though the results of changes are very positive, they still lead to discontinuities and a loss of cultural identities. In addition, the rosy effects of distant memories also ensure that positive aspects from the past are remembered better and even exaggerated. Therefore, it is often considered that lives were more stable and less stressful in the planned economy period, especially from 1978 to the mid-1990s.

The original intention of implementing the planned economy was to make China a utopia where class differences would eventually be eliminated. Thus, as part of China's planned economy system, a *unified job allocation system* and a *unified wage system* were also established in the 1950s to this end. By 1956, the country had transformed almost all privately owned industrial and commercial enterprises into state-owned or collective enterprises and four million unemployed urban workers had been assigned jobs. From then on dismissing workers was prohibited (Yuan, 1990). Consequently, under the unified job allocation system that ran until the mid-1990s, the urban population all had jobs and enjoyed lifetime job security, with automatically allocated employment upon graduation. In addition, under the national *unified wage system*, the central government set the general wage policies and determined both the wage structure and differentials. The wage differentials between managers and workers as well as between intellectual and physical labourers were

intentionally kept very low. Generally speaking, the monthly income of a factory manager, for example, was only three to four times as high as that of an ordinary line-worker (Ding & Warner, 2001). This model disappeared with the demise of the planned economy.

Lowenthal says that 'nostalgia is memory with the pain removed and the pain is today' (Lowenthal, 1985, p. 8). It is the same when it comes to the Chinese memory of the planned economy era, especially for the period from 1978 to the mid-1990s, which is often seen as a golden age: the chaotic *Cultural Revolution* had ended, *Reform and Opening* had just started, foreign consumer and cultural products were slowly pervading China, and people were earning higher incomes but still enjoying the old uncompetitive and therefore low-stress lifestyle. The post-80s Chinese population grew up within the context of the 'Reform and Opening' and spent their collective childhoods in this 'golden age'. Today, society is very different – there is no guaranteed lifetime employment and it is impossible for any university graduate to avoid the possibility of unemployment. Soaring house prices and rising household indebtedness ensure that urban Chinese, especially the post-80s generation who will form or have recently formed their own families, have to work overtime to keep their jobs and earn a living. Also, the gap between the rich and the poor is becoming increasingly wide and there is inequality everywhere (Shi, Li, Sato, & Sicular, 2013). Although the members of the post-80s generation have never experienced working and supporting their families under the planned economy, the information that they have obtained from older people or through their childhood experiences is very likely to reinforce their susceptibility to nostalgia. In addition, the drastic changes to urban landscapes, urban material surroundings and popular culture may also have enhanced the feeling of discontinuity and loss of identity. Specifically, for example to the post-80s generation, many artefacts that used to be very popular twenty years ago have almost all disappeared today.

The thirty-six-year period from 1956 when China's planned economy system was officially established to 1992 when China decided to transform to a market economy may be considered an equilibrium period, during which the deep structure of the planned economy system influenced every aspect of everyday lives and then remained fixed for a considerable period. Subsequently this equilibrium was punctured by the economic revolution, and now China is in a transitional period whilst presumably regaining equilibrium. The nostalgia wave may serve as a collective mechanism for the population to reflect on which fragments of the past should be valued and used to establish the new deep structure.

2.4.3

The Global Nostalgia Wave

As illustrated in previous sections, the political and economic revolutions of former Eastern Bloc countries and China caused the current nostalgia waves in these two regions. These revolutions had little impact on the nostalgia waves of other regions not directly involved. However, some changes may drive a nostalgia wave to affect a global sphere of influence and provide mementos of nostalgic memory recognised by a global population of a specific age cohort. Continuous technological changes, especially in information and communication technology, have proved to be a striking drive ensuring that the global nostalgia wave occurs.

Technological changes have a powerful capacity to continuously reshape human behaviours, lifestyles and even entire societies. When looking back through human history, it is possible to discern that the rate of technological development has been accelerating consistently, whereas the time needed for new technologies to successfully replace previous ones in everyday lives has been steadily decreasing (Kuzweil, 2001). From the emergence of Homo sapiens approximately 200,000 to 150,000 years ago, human beings struggled over hundreds of thousands of years to complete the journey to the *Agricultural Age*. Subsequently, this epoch lasted steadily until the 1700s when the invention of the steam engine opened the door to the *Industrial Age* and only after another two hundred and fifty years did human society enter the *Information Age*. In his book *Shift Age*, Houle (2008, p. 5) describes this accelerating epochal change thus: If we consider fifty years one human lifetime, 'modern man therefore has spent 2,800 lifetimes in the caves, 200 lifetimes tilling the land, 5 times with machines, and only a single lifetime living in the Information Age'. It is arguable that from the end of World War II to the present, people have witnessed the most rapid development of technologies throughout all of human history.

It seems that the need for cultural nostalgia in contemporary human societies has been growing, along with the accelerating pace of technological change. Such rapid transitions have ensured that the current generation has to undergo faster changes in life, which used to occur over the course of several generations. This has in turn forced people to adjust their behaviours and lifestyles much more frequently than their ancestors. When simply looking back one or two decades, most people living in modern societies may find that many products, technologies, the relevant behaviours and cultural aspects that used to be popular have completely disappeared in their current lives because newer technologies have displaced them.

'The future is now' is often used to describe the speed at which significant changes are occurring and the increasing unpredictability of what new changes will happen next. Ubiquitous computing, Internet of Things, big data, robotics and artificial

intelligence are perhaps the most noticeable technologies that are now fundamentally and rapidly changing people's lives. They are transforming all those everyday products that we are familiar with (e.g. TV, vacuum, car, cooker, fridge, heating system) to connected smart products. Apparently, along with the appearance of these smart products, new lifestyles, new behaviours, new concerns (e.g. privacy and data safety) as well as new conveniences will appear simultaneously. Many companies or brands that fail to manage the transition will soon disappear from people's lives. It is reasonable to surmise that such continuous and accelerating technological changes can result in similar social effects or discontinuities as political and economic revolutions. Furthermore, because of globalisation, when a new technology is invented and applied, it does not gradually transfer from one country to another, but simultaneously penetrates contemporary societies around the world. Thus, in this case, the nostalgia wave driven by accelerating technological change can often find audiences worldwide.

2.5
Design in Nostalgia Waves: Three Cases

In the previous section, I have described and analysed how nostalgia waves are formed at the regional and global levels through examining their relationship with prior political, economic and technological changes. In the following part of this chapter, I would like to focus on design by exploring what role design (i.e. designers, designer activities, and designed artefacts) plays in nostalgia waves and what opportunities for both commercial and social design might accompany nostalgia waves. In order to develop a solid discussion on these two questions with well-illustrated details, three design cases (i.e. Ampelmann, Nengmao Store and C60 Redux) based on two regional and the global nostalgia waves, respectively, are presented first in this section. I deliberately use the three cases mainly for illustrative purposes. Thus, I do not plan to present these cases in as much detail as those in Chapters 5, 6 and 7, in which one single case study and one multiple-case study are used to analyse the nostalgia-driven design processes, as well as describe the sociocultural and historical backgrounds of those cases.

Figure 3. A Legendary East German 'Trabant' car manual displayed in the DDR Museum in Berlin
(photo by the author)

2.5.1

The Ampelmann and (Eastern) Germany's Ostalgie Wave

In the summer of 2014, I spent a week in Germany to experience the GDR nostalgia (ostalgie) wave directly in the field and observe the role of design within it. In the early 1990s, mainly because of political reasons, almost everything created by East Germany in the socialist GDR rapidly became obsolete following the reunification. Today, the DDR Museum in Berlin, a space full of obsolete everyday GDR artefacts, is perhaps the most effective venue to directly experience what life was like in the GDR. For former GDR citizens, this museum is a place where they can re-experience their previous past and show their descendants how they used to live. For international tourists, it is one of the most exotic places of interest, both to visit and to experience the unique cultural aspects of the country's past. Despite having special cultural and emotional significance, most of the GDR artefacts in the museum are no longer present in contemporary German daily life. Nonetheless, some German designers have made great efforts to offer some of those mundane GDR bygones another chance to flourish as living cultural icons beyond museums. The *Ampelmann* is one of the most successful design examples riding on the ostalgie wave that has achieved great cultural and commercial success.

'The Ampelmann (das *Ampelmännchen*)' refers to the two human symbols on

Figure 4. The Ampelmann traffic lights in a Berlin street in 2014 (photo by the author)

pedestrian traffic lights which were created by GDR traffic psychologist Karl Peglau in October 1961 for socialist East Germany (Ampelmann, 2008). This kind of traffic light is common around the world, with the walking figure in green and the stopping figure in red. But there are two key differences that have made the Ampelmann figures unique in design. First, the walking and stopping figures were deliberately designed to be very different from each other, in order to provide a clearer signal for small children, colour-blind, or visually impaired pedestrians. Second, the special visual elements of the Ampelmann, such as the large hat, pudgy body shape, and jaunty gesture, made them look cheerful and positive and able to stand out from their bald, robotic and affectless peers in the West.

In 1982, the two Ampelmann symbols became TV stars in a cartoon series for teaching children about traffic safety (ibid.). From 1961 to 1990, the Ampelmann figures were serving the country mainly as mundane utilitarian objects, perhaps without much cultural meaning attached. Throughout the same process, however, they were gradually woven into East Germans' daily lives and eventually became a potential memento of their cultural nostalgic memory. After the fall of the Berlin Wall, the Ampelmann traffic lights, like everything else created for the GDR, suffered from the overwhelming 'West is the best' trend. Within a couple of years, the Ampelmann lights were quickly demolished. However, after a brief period, the Ampelmann was rediscovered, ascribed new value and given a new life by an industrial designer from West Germany – Markus Heckhausen.

Heckhausen had his first experience of the Ampelmann during a visit to East Ber-

Figure 5. The Ampelmann flagship store in Berlin – the top right photo shows the Ampelmann Lamps (photo by the author)

lin in 1988. He was immediately attracted to the special traffic light figures that were very different from those anywhere else (Royston, 2015). In 1995, the designer moved from Swabia in southwest Germany to eastern Berlin and soon realised the former GDR capital no longer relied on the Ampelmann to guide pedestrians (Koepf, 2005). Back then the ostalgie wave had not yet started, as the majority of former GDR citizens were most likely still celebrating their new freedoms, lifestyles, and diverse and abundant western consumer products. Heckhausen identified the potential nostalgia-related cultural and emotional value of the Ampelmann, and rescued hundreds of discarded original GDR traffic lights from destruction. Then, he transferred the original Ampelmann figures from the traffic lights into his first Ampelmann design project – the *Ampelmann Lamps* for decorative domestic lighting (Ampelmann, 2008).

Heckhausen promoted his design with the words 'durch die Ampellampe ein Stück Ost-Kultur auf dekorativ-humorvolle Weise weiterleben (Live a piece of Eastern culture in a decoratively humorous way through the Ampelmann Lamps)'. Those lamps became a big success and were sold out in a few months (Ware, 2013). Various German media soon reported on the designer and his novel lamps. For example, 'A young capitalist from Swabia glamorises the East German regime' was how Christoph Dieckmann (1996), an East German journalist, described the idea in his article *Danke, Herr Ampelmann!* published by the Western monthly *Die Zeit.*

Figure 6. Ampelmann as a symbol for celebrating 25 years of German unification
(photo by the author in 2016)

East Germans also loved the return of the familiar symbols and began to realise that they had already lost many things that should be cherished as part of their unique cultural identity. Given such a positive response from the public, Heckhausen continued this design project by acquiring the patent of the Ampelmann figure from Karl Peglau, and publishing the Ampelmann brand book *Das Buch Vom Ampelmännchen* (Heckhausen, 1997) in collaboration with him. Later, with Heckhausen's design studio *MAKE Design GmbH*, the first Ampelmann collection (e.g. bottle openers, magnets, corkscrew, T-shirt, etc.) was designed and launched in 1999. Heckhausen then built on this by establishing Ampelmann GmbH.

Today, the two Ampelmann figures have become some of the best known symbols of Berlin and enabled a cult brand with a turnover of eight million Euros per year (Pidd, 2011). Ampelmann GmbH has opened one Ampelmann restaurant in Berlin-Mitte, and six Ampelmann shops in different popular areas of the city selling over five hundred types of products with the little green and red men as the decoration and trademarks. Though the original Ampelmann lamps may have targeted the East Germans who shared their cultural nostalgic memory, tourists to Berlin from all over the world nowadays buy Ampelmann products as souvenirs, because they contain something unique to Berlin. In the meantime, the resulting public affection for the once dismissed Ampelmann successfully saved it from total obsolescence – in fact, the Ampelmann figures not only returned to pedestrian crossings in Berlin, but also eventually became symbols celebrating German reunification.

Figure 7. The Nengmao Design Studio and Store in South Shaanxi Road in Shanghai
(photo by the author)

2.5.2

The Nengmao Store and China's Nostalgia Wave

As a Chinese who grew up in Mainland China, I have directly experienced the current nostalgia wave in the country. The most active and passionate audience for this nostalgia wave are the Chinese post-80s (i.e. those born in the 1980s) urbanites. Generally what they mainly feel nostalgic about is their childhood in the 1980s and the 1990s, which occurred at the end of China's planned economy period. Looking back to the lifestyle and designed artefacts of that historical period, it is easy to define their uniqueness. Firstly, they were not greatly influenced by China's thousands of years of tradition, because of the communists' strong ambition to build a new China and obliterate the past. There was even a long-lasting national movement called *Destroy the Four Olds* (i.e. old customs, old culture, old habits, and old ideas) during the 1960s and 1970s. Secondly, for most of the planned economy period (i.e. from the 1950s to the early 1980s), China was an economically and culturally closed country, and as a consequence there were very limited imported goods from other countries. Cultural information from Western countries was blocked and only Soviet culture and style had a significant influence in China. Such an isolated condition allowed Mainland China to develop a unique design style of everyday products, which was distinct from that of China's own tradition, those of other Chinese cultural areas (e.g. Hong Kong and Taiwan), and those of other parts of the world. Thirdly, because of the planned economy system in which market competition was eliminated, with both production and consumption being deliberately planned and limited, design had never been used as a tool for market competition in China during the planned economy era. Meanwhile, however, most everyday products (e.g. trainers and bicy-

Figure 8. Nengmao Stores in Shanghai
(bottom photo by the author, and up photo courtesy of Nengmao Store and Creative C
http://creativec.com.cn/design/neng-mao)

cles) manufactured during those decades were very solid and expected to be handed down and used by at least two generations in families.

With China's economic transition, the lifestyle as well as most everyday products and brands that used to be popular and loved during the planned economy period quickly became unwanted and disappeared. Unsurprisingly, they have now become effective mementos of cultural nostalgic memory. As one of the first explorers of China's nostalgia wave, Xixi (喜喜), a Chinese post-80s designer, has integrated some classic design elements of those obsolete everyday products into his contemporary design works and successfully evoked post-80s cultural nostalgia. On 9th July 2010, I paid a visit to Nengmao Design Studio in Shanghai and interviewed Xixi there. This enabled me to record a more detailed narrative about his Nenemao Store.

The Nengmao Store sells Xixi's design works inspired by Chinese popular everyday products and cultural nostalgic memories of the 1980s. 'Nengmao' (能猫) is a

humorous brand name that evokes memories of childhood among the Chinese, as the origins of the name derive from an innocent misspelling of 'panda' in Chinese (熊猫). Xixi himself explained the reason for the brand name thus - *'it always reminds me of how simple but happy, sweet my childhood was. I believe that was something shared among many of our generation … It was easier to be happy when we were children. Now I've made Nengmao alive. And, I hope it would remind everyone of such childhood happiness.'* Xixi made this misspelling many times at primary school. In fact, this is a common mistake that Chinese children make when learning basic Chinese characters at an early age, including myself. Consequently, this name could correctly convey what the brand is all about to its target audience, and also immediately build an emotional connection with them by humorously recalling their collective childhood memory. Xixi was trained as a graphic designer during his undergraduate studies. He is also a member of the post-80s generation and therefore experienced that particular historical period and shares its collective memory. Xixi's nostalgia-driven design efforts and business all started from his own strong nostalgia need and the pleasure of sharing cultural nostalgic memories with his peers.

> *Xixi:* It just started from a hobby. In 2002, when I was still a college student in Chengdu studying graphic design, I became interested in collecting everyday products and toys that used to be very popular during my childhood but which are no longer being made. At the beginning, it was just a very personal hobby, but as the number of items I'd collected increased, I started to display my collection in a room and invite friends to see them … When I showed my collection to my friends, everyone was so happy, excited and telling their childhood stories to me. It did bring back a lot of good memories of our childhood. And then, the small 'museum' became increasingly famous and popular. A lot of visitors started asking me if I would sell some pieces from my collection ... For some of these old products or toys, I had collected many pieces of one. People were crazy about them and willing to pay quite a high price to take them home, so I thought it might be a good way to earn money and support my hobby. Then, I made an online store in 2005 selling them. After that, about two years later, I established the Nengmao design studio and store in Shanghai, and started designing and producing new products inspired by my collection.

Soon after the establishment of the Nengmao Store, it became famous among the post-80s Chinese. Interestingly, it seemed so easy for Xixi to promote his design

works and the idea of Nengmao Store. Social media was an extremely effective and free channel because the post-80s Chinese passionately reposted and shared information about the store. Subsequently, traditional media platforms also noticed the Nengmao Store, and voluntarily reported and promoted it with strong cultural and emotional motivations.

> *Xixi: That's true! I spent nothing on promoting the brand … At first, I just posted all the information about Nengmao online. It was reposted by I don't know how many people on various social media platforms. Then some editors from magazines and TV stations came to me and wanted to know more about the Nengmao Store and report on it. They actually voluntarily made advertising for me and the store, probably because they were also excited about seeing these 'old friends' again and they knew that a lot of Chinese post-80s would be crazy about re-experiencing their wonderful and carefree past days.*

Riding on the Chinese nostalgia wave, the Nengmao Store expanded quickly, and from 2007 to 2010 it opened one online store and four brick-and-mortar stores in the four most popular creative districts in Shanghai, plus one brick-and-mortar store in Chengdu. Nostalgia-driven design works include clothing (e.g. a Chinese striped sailor's shirt, double happiness T-shirt), accessories (e.g. black bags with major Chinese cities' names), stationery, etc. Like Ampelmann in Germany, the Nengmao Store also attracted the attention of tourists who do not share a collective childhood memory with the post-80s Chinese, but have found the Nengmao Store's products great souvenirs that embrace a unique but bygone characteristic of Mainland China.

> *I would say it (the Nengmao Store) is going quite well. I've just opened my fourth shop in Shanghai in '1933 Shanghai Slaughter-house', which is also the biggest shop so far … The other shops, here is one (South Shaanxi Rd.), another one in Changle Rd., and one in Tianzifang, Taikang Rd … I also have a shop in Chengdu. But, if you like our products, you can buy them through our online shop no matter where you are … About the customers … Well, it depends on different cities. Here, in Shanghai, foreign customers and customers from Hong Kong and Taiwan actually outnumber locals. But in Beijing and other cities, most customers are locals.*

2.5.3
C60 Redux and the Global Nostalgia Wave

Many profound technology-driven life changes within the global sphere of influence have occurred over the past decades. One of them is the reduction, or even complete loss of physicality in some aspects of our lives, engendered by the development and broad application of digital technology. The digital environment has become absolutely dominant in many cases. For example, handwritten letters have been largely replaced by emails or mobile texts; camera films are no longer needed for taking photos; millions of digital books have been made available for reading on mobile devices. The loss of physicality has also been incredibly fast in modern musical life.

In 1877, Thomas Edison's phonograph realised the first audio recording and music was soon ascribed certain physical embodiments. With the development of storage media and playing devices, wax cylinders, 78 rpm discs, LPs with turntables, and cassette tapes with boom-boxes or the Walkman permeated everyone's life. The physicality of stored music they provided enabled people to collect music with enriched visual, tactile and olfactory experiences, and in some cases to grow a very special affective relationship with their music collections. These were then followed by CDs and MP3 with iPod/iPhone. A trend can be clearly observed – 'each subsequent format has less physical presence while allowing for more storage and greater possibilities for user programming' and at the same time 'each format also has reduced the listener's physical interaction with music' (McCourt, 2005, p. 249). Some might consider that music had never had any physical representation before the emergence of audio recording technology. But at that time, high fidelity music could not be collected as physical possessions but only be enjoyed when these physical elements gathered – the musicians, instruments, music hall, music scores, concert tickets – and therefore in this sense there were actually several possible physical representations of music but not a single type (e.g. LP or cassette) which allowed people to collectively develop an affective relationship with it.

Figure 9. The decreasing physicality of recorded music

Compared to everyday musical life in the 1990s, today's digitised musical life is much more convenient, cheaper and with wider choices. A smartphone can store tens of thousands of tracks (even local storage of music data has been greatly replaced by online streaming services), and made available directly to the listener anywhere. But sadly, digital sound files are just intangible flows of ones and zeros, people cannot hold them in their hands anymore and they do not contain history or physically grow old with people as vinyl LPs and cassettes did. More and more music lovers born before the 2000s have sensed these emotionally undesirable aspects of listening to music digitally, and the cultural nostalgia for the physicality of music has become an essential aspect of the global nostalgia wave. Perhaps for this reason, the sales of vinyl LPs and turntables have been growing quickly since 2007. According to *2015 Nielson Music U.S. Mid-Year Report* (2015), while sales of streaming music are continually increasing, representing the dominant music format today, vinyl LP sales had also increased by 38% in 2015 when the report was published. Likewise, years after the Oxford Dictionary announced the 'cassette tape' would be removed from the new version of the dictionary, the last cassette manufacturer (National Audio Company) has become profitable again. In 2014, it produced over 10 million cassettes for customers all over the world and sales in 2015 are up 20% (Pettitt, 2015).

Some designers have actively reflected on the cultural nostalgia for the physicality of music. C60 Redux by Martin Bone (former Design Director of IDEO New York office) is one such design case that may well elicit nostalgic experiences among music lovers born before the 2000s across the world. In order to clarify the motives, thoughts and process behind this design case, I had an interview with Bone at his *Bone and Black* design studio located in Grand Street in New York City on 29th November 2012.

C60 Redux is the outcome of a design experiment conducted by Martin Bone and his colleague Kara Johnson. They published this design experiment in their IDEA Gold Award winning book '*I Miss My Pencil*' (2009). C60 Redux is a music playing system that includes a 12-inch square platter with black vinyl-like surface and music cards shaped like cassette tapes. In this design concept, one music album is embodied as a 12-inch square paper, which can be torn into a maximum of 12 smaller pieces (i.e. music cards). Each music card represents one song or music track in the connected digital music device. When a music card is placed on the platter, the corresponding track will be played. Moreover, when different music cards are placed in a clockwise order, the songs will be played in the same sequence. Such a function allows the users to physically create 'mix-tapes' and give them to others, as people used to do with cassette tapes in the 1980s and 1990s. With the help of engineers, the concept was eventually developed to be a functioning prototype through RFID (radio frequency identification) technology.
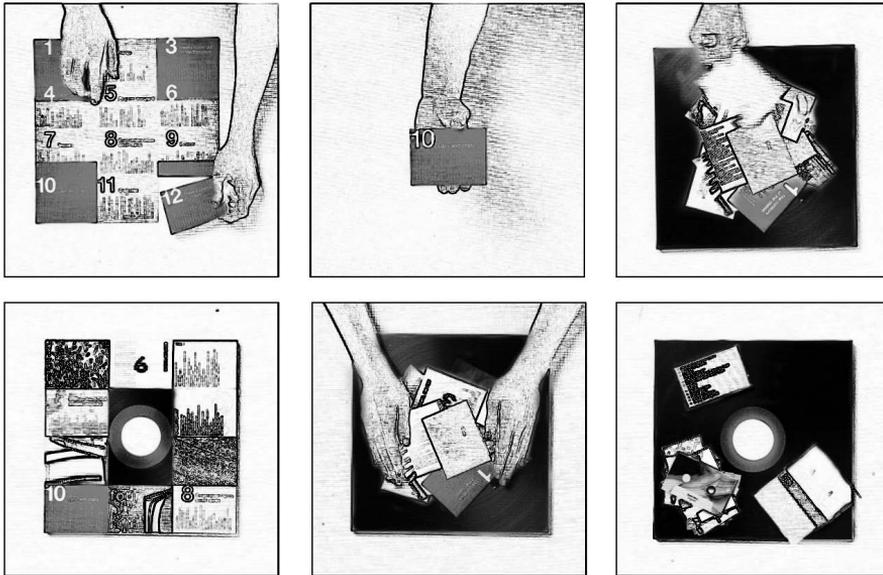
Figure 10. C60 Redux and how the system works

Though C60 Redux is only a conceptual design that has never been mass-produced, it became well known though the book and the Internet. To a degree, this design should be considered a piece of critical design work, because the main aim was not to persuade people to appreciate the design outcome, but rather to encourage them to critically think about the transition from analogue to digital. During the interview, Bone stressed repeatedly that C60 Redux was designed without thinking of any immediate commercial potential; however, it was suspected that it might ultimately be transferred to a commercially profitable design. It was a very personal design experiment that he constructed, based on his own longing for some cherished previous experiences and affective connections that he and other people living in the digital age had lost.

> **Bone:** *C60 is really personal to me … The reality is we only built it as a prototype and there was no commercial value, it's an exercise and understanding of what the transition between the two stages would mean … It really started with this idea of I realised the behaviour of myself, somehow, I've sold my soul for the digital music because of the convenience of easy taking stuff, but I realised I completely lost my connection with music … So I wanted to understand why that behaviour shifted in me. If that made me feel sad, what I can do to*

make myself feel less sad about it and what if I can actively create an object and to use it ... That's kind of how this idea evolved ...

In essence, C60 Redux is designed based on Bone's personal nostalgic memory, which is a part of a globally shared cultural nostalgic memory. Bone grew up in England and then moved to the US to live and develop his career. He created the concept of C60 Redux based purely on his own very personal nostalgic memory – the memory of analogue music in his life – and his realisation that some valuable emotional aspects are missing today. However, this concept successfully resonates with people across the world. For instance, C60 Redux made me, a man who grew up in China and now lives in Finland, nostalgic. Although casually conducted, I also showed this design concept to many of my friends in their 40s and 30s from different cultures, and they all expressed a similar strong nostalgia.

> **Bone:** *You know I have a memory, a cultural memory of playing music. It was a very physical thing. You watched the motion of the object. The object itself had a ritual about how you engaged with it. So even from the moment when you used to go to a store, you know, physically look through the racks and the format was so large, you would connect to it, you would connect to people in that large space. Then you get home, you unwrap it, you clean it and play it, you watch the needle move. All of those elements had completely gone away when you moved to the digital space, yet there is so much more convenience. And so I think that is a kind of design issue when you want to add these elements of the ritual or the things that we have memories with to something that is essentially devoid of tactile quality or any quality.*

Though Bone clearly admitted that nostalgia was the intended experience that he wanted to evoke for the audience of the C60 Redux, he did not want it to be merely about 'wallowing in rosy memories of a golden age'. Instead it directly encouraged him to critically examine aspects of both the past and present of much loved musical experiences and try to mix them to create something that had never previously existed.

> **Bone:** *Yes! Yes! I really wanted people who are reading the book (I Miss My Pencil) to know and to have nostalgia for that moment that they've lost and see if they could relate to this new version of it. Yes, it was definitely set out to be this kind of nostalgic thing and somehow connected to contemporary technology in contemporary life. ... But*

also, I don't want to spend my entire existence living in the past. So it's about a balance … Somehow I want to use the 12-inch square. I want to use what was formally the record sleeve in some way. But I don't want to necessarily be using the vinyl. I want to use new technology but I like that space…

Bone: *Spending ten seconds making a playlist is not the same as the hours of physical recording it would take. So, as everything gets smaller in time also our connection to the process has been lost. How do we slow down to the point where technology, interaction and connection are meaningful again? So it doesn't just become I consumed it, then it's gone … We were exploring them (physicality and digital data) and I think we will keep exploring them. There might be a happy medium between the two where the spatial relationship, that physicality is a way to sort digital data.*

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2.6

The Role of Design in Nostalgia Waves: Creating the Synthesis

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As illustrated in the three nostalgia-driven design cases, designers, design activities and designed artefacts have been playing a crucial role in the emergence and growth of nostalgia waves. When examining these nostalgia-driven design cases, as extended dynamic processes, in the contexts of the three nostalgia waves, it is not difficult to recognise that these processes follow a pattern, which greatly resembles one of Hegel's greatest philosophical legacies: the ***Dialectic*** (i.e. '*thesis-antithesis-synthesis*'). Although such a triad was not directly termed by Hegel (Popper, 1940), it is a pattern that constantly appears in his major philosophical works (e.g. Hegel, 1807/1977, 1821/1991, 1832/2010, 1837/2001). Simply speaking, there are three steps in a dialectical unfolding process. '*Thesis*', as a starting point, represents an immediate realisation of a concept, an understanding or an argument that is often delineated and relatively static. The further examination into and reflection on the 'thesis' gives rise to 'antithesis', an opposite concept, understanding or argument that negates the 'thesis'. It provides a new perspective to evaluate the opposite as also being valuable, meaningful or right at a different time and in a different context. For Hegel and Hegelian philosophers, such a contradictory condition is not the end of the process, but leads to the third step – 'synthesis' – which preserves, unifies and goes beyond the first two (Lauer, 1977; Popper, 1940; Singer, 1983). This dialec-

tical pattern provides me with a framework to better understand the role of design in nostalgia waves, which I may concisely express as – ***creating the 'synthesis'***.

Looking into the three cases through the lens of dialectic, the process starts with, thesis, a society's constant dissatisfactions with its current situation or aspirations for a better future, which lead to (e.g. political, economic, or technological) changes that may be radical, rapid and incremental. Antithesis appears sometime after the thesis, when some members of the society become aware of those negative aspects that the earlier changes have brought or of the valuable things that they have lost after the changes. Some of the critics may stop at the antithesis, simply holding a negative view of the changes, while some extreme ones may even deny the progress and overly focus on the merits of the past, which are typically idealised. Finally, the synthesis is enabled by those creative members in the society who, through critically interpreting the past in the present context, recognise the relative value of both thesis and antithesis, preserve and combine the merits of each, and eventually develop some innovative solutions with warm familiarities that go beyond both thesis and antithesis. Creating the synthesis is the most important role design plays in nostalgia waves.

Design has multiple facets, being a social, cultural and commercial act that explores and attempts to fulfil the needs and desires of individuals or collectives. Among different nostalgia waves, there are some common underlying social needs that are greatly intensified by earlier revolutionary changes, such as the needs for continuity, cultural identity reconstruction and social connectedness. In the early phase of a nostalgia wave, it is often possible to discover the presence of designers, as well as artists, musicians, novelists, filmmakers and TV programme planners, who are usually well placed to detect these underlying needs, the beauty of memory and the power of cultural nostalgia. In a similar manner, just like artworks, music, novels, films and TV programmes that evoke cultural nostalgia, many designed artefacts (e.g. mass-produced products) have also served as a type of memento of cultural nostalgic memory. Based on an analysis of the nostalgia wave following the unification of Germany, Brtmanski (2011, pp. 226-227) concludes that the iconic artefacts of the GDR are 'fulfilling the role of mnemonic bridges rather than tokens of longing for the failed communist past, they are the regular symbolisations of continuity in the irregular times of transformation. They allow different incarnations of modernity to be concretely reconciled within a single urban fabric, as such they anchor temporal changes in a phenomenological way. They are "cultural links" between the localised histories and universalising meanings. Such links provide a sense of connectedness and symbolic coexistence of various icons in a depoliticized way often needed by those "exhausted by the excessive amount of history"'. In fact, such a role of designed artefacts as mnemonic bridges can be considered a common

factor in all nostalgia waves. Their popularity does not mean that the public really wants to go back to the past and deny progress, but rather makes their lives feel more continuous, and maintains both cultural identities and social connectedness.

2.7
Accompanying Design Opportunities

Taking design as a tool for commercial success has been the dominant paradigm of design since the industrial revolution (Margolin & Margolin, 2002). Accordingly, the 'market model' is often used to study design cases, for example whether or how to make a design outcome attract consumers to approach, like and spend their money on it. However, since Papanek's book *Design for the Real World* (Papanek, 1972) was published, being socially responsible and creating social benefits have also become a great concern of the contemporary design field. As a result, a 'social model' of design has quickly emerged. Though Papanek suggests that social designers should set themselves against the market model of design that induces consumers to engage in excessive consumption of products, I agree more with the argument of Margolin and Margolin (2002, p. 25) that the key difference between the market model and social model of design lies with 'the priorities of the commission rather than by a method of production or distribution … The primary purpose of design for the market is creating products for sale. Conversely, the foremost intent of social design is the satisfaction of human needs'. I do not believe that being commercially profitable and being socially good have to be mutually exclusive, but rather can be found inclusive in many cases. In the following paragraphs, I will use both perspectives of market and social models to examine what design opportunities may accompany the nostalgia waves.

2.7.1
From the Market Model Perspective

Following various revolutionary changes, nostalgia waves have brought great commercial opportunities for designer start-ups. As a type of cultural and creative practitioner, many good designers are highly sensitive to the emerging cultural trends, and the public needs and desires connected to these trends. Well-designed products and services that are able to fulfil these needs and desires naturally have a better chance to be liked and consumed. As illustrated by the cases of Ampelmann and Nengmao, the designers achieved great market success through designing for the nostalgia waves in Eastern Germany and Mainland China, respectively. Though the two nostalgia-driven design cases took place in two distinct cultures remote from

each other, addressed two different regional nostalgia waves, and initially targeted only domestic markets, many similarities can be discerned. The two designers both started their nostalgia-driven design explorations by realising the potential value of specific obsolete artefacts that had strong cultural and emotional connections with the societies' collective pasts. They then started rescuing these obsolete artefacts from the rubbish and collecting them. Perhaps because of their designers' passion for creation, they ended up designing new artefacts inspired by the old ones and with the original nostalgic bond embedded within.

Though both Ampelmann and Nengmao were new brands, they were born with inherited nostalgic bonds with the public. One of the crucial difficulties that most start-ups face is to gain publicity without a great investment in marketing communication. Interestingly, Ampelmann and Nengmao were both able to overcome this. Their early nostalgia-driven design attempts quickly and intensively resonated with their target audiences, because the brands and products are valid mementos of cultural nostalgic memories. With little or no promotional effort and cost, their nostalgic brands and products were voluntarily introduced and popularised by all kinds of traditional media, as well as their nostalgic audiences through social media. As I have argued in Chapter 1, the development of the Internet and social media has enabled the instantaneous sharing of nostalgic memories when and wherever desired. Thus, not only has this made the recalling of cultural nostalgic memory generally result in positive nostalgic experiences, but also made popularising those nostalgically touching design works extremely effective and low-cost.

Perhaps surprisingly, the aspects that made the locals nostalgic in regional nostalgia waves also became something that provided visitors with authentic and exotic experiences. Ampelmann and Nengmao both attracted large numbers of tourists to visit and buy the products, even though they do not share those particular cultural nostalgic memories. Because of their cultural roots in the GDR and the planned economy of Mainland China, these brands have eventually turned into unique cultural experiences.

In addition and without true nostalgia being evoked, locals who are much younger than the originally targeted audiences also showed their predisposition towards these nostalgic brands. Considering the ongoing process of rapid historical change, this phenomenon among younger locals may be understood in relation to the name of David Lowenthal's book (1985) *The Past is a Foreign Country*. Such attractions for foreign tourists and younger locals may also be closely related to their desire for referential authenticity (e.g. objects that are unique and rooted in GDR and Chinese Mainland cultures).

Designing for nostalgia and taking advantage of nostalgia waves are an effective way for a new brand and its products to emotionally connect with the public. How-

ever, such a positive effect of nostalgia may be short-lived. In fact, while I was finalising this dissertation, I tried to find out how the Nengmao Store was doing in 2016, since the case study was conducted in 2010. It turned out that the business was no longer doing well, as evidenced by the lack of news in the past two years, very limited number of products available, and poorly maintained online shop. Indeed, designers may not always have a clear view of how to sustain a brand built on nostalgia, especially when the current nostalgia wave comes to an end. Therefore, a long-term strategy is needed for this type of brand to develop beyond nostalgia. More on this issue and one of the possible solutions will be discussed in Part II, through a detailed analysis of a multiple-case study.

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2.7.2

From the Social Model Perspective

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This doctoral research was initially planned under the market model of design, with the aim of understanding how designers may learn from and utilise a society's cultural nostalgia memory to create emotive products and position a brand with perceived value beyond utility. However, after presenting my early ideas in various academic forums, an obvious dissatisfaction with what was construed to be a purely commercial purpose often appeared in the feedback, especially in those given by Western design academics. Some even openly rejected the topic and suggested that studying nostalgia and memory is suited to the field of business rather than design. Such a misunderstanding may have occurred for two reasons: firstly the growing interest in social design and secondly my neglect of the social design opportunities that studying nostalgia as a contemporary design issue might bring. Therefore, even though it is extremely difficult, if not impossible, to study nostalgia from both market and social perspectives, with a decent depth, in just one doctoral dissertation, in this section, I review some emerging design opportunities related to nostalgia from the perspective of social design.

Before developing the review, I shall first clarify what I mean by 'designer', as 'designer' often becomes a problematic title or identity when discussing contemporary design from a social model perspective. It may refer to those who have had formal design education, consider themselves design professionals, and whose primary focus in practising design is to generate social good. Meanwhile, 'designer' is often also used to refer to many other innovative people who have never had design education, and do not necessarily consider themselves as design professionals, but have initiated and conducted brilliant projects with significant positive social impacts. For the sake of clarity, I consider only those who have had design education, practise design and consider themselves design professionals as designers in the current discussion.

This indeed does not sound as fashionable as those extremely broad concepts of design claiming that everyone is a designer and all human creative activities are design practice. I shall make myself clear at this point that I do not hold a narrow and conventional concept of design. I understand that design has become a systematic and disciplined process for innovating, and the issues that designers deal with have broadened from simply visuals and tangible products to much more complex systems such as healthcare systems and political policies. What I am trying to do is to clarify the borders of the identity of a designer, as referred to in this particular chapter, to give it a temporary scope for enabling a solid discussion with little ambiguity.

Designers may be involved in a project at two levels. More strategically, designers may act as the initiators and strategic planners who contribute to social innovation projects through their design mindset (or thinking) as well as design skills. In this case, designers are normally more passionate, have more intrinsic motives, and feel a stronger sense of ownership of the projects. On the other hand, designers may also simply act as the (e.g. product, website) design service providers. They deliver design outcomes according to the predefined design briefs given by someone else, and without much questioning why the project should be done, what (else) and how different the design outcome could be. After a long-term search of social design cases related to memory and nostalgia, with the C60 Redux as an exception, it turned out that designers acted, in most cases, as design service providers only. In other words, design professionals with strong social design interests are rarely involved in such projects as the key initiators and project leaders. The following paragraphs present the three most notable directions related to memory and nostalgia that may offer social designers with new design opportunities to explore.

Provoking Critical Reflection

As the design case C60 Redux has shown, designers may also use nostalgia-driven design as a strategy for critical design, whose main purpose is to provoke critical reflections on the present in comparison with the past. The purpose of critical design is mainly to make us think. It is also for 'raising awareness, exposing assumptions, provoking action, sparking debate, even entertaining in an intellectual sort of way, like literature or film' (Dunne & Raby, 2007). Though the outcomes of critical design are mostly artefacts, the main concern of the critical design activity is to retain 'the popular appeal of industrial design while using it to seduce the viewer into the world of ideas rather than objects' (Dunne, 2008, p. 147).

In this sense, Bone's design of the C60 Redux can be clearly seen as a critical design activity. In this particular case, using the design outcome to evoke viewers' nostalgia has been 'a way of provoking complex and meaningful reflection on the ubiquitous, dematerialising, and intelligent artificial environment we inhabit' (Dunne, 2008, p.

xv). Such a design effort leveraged nostalgia-driven design in bringing critical attitudes to the public regarding what is taken for granted in the increasingly digitised world. Specifically, by evoking viewers' nostalgia for the seemingly obsolete analogue musical experience, C60 Redux provokes a series of questions. For example, why do I feel pleasantly excited about such a relatively inconvenient way of listening to music? What have we lost in the digitising process? Is efficiency or convenience always more important than rich experience? Is it possible to bring some cherished experiential aspects of analogue musical life back to contemporary digital musical life? How could the new technologies actually help designers to achieve this?

Maintaining or Reconstructing Cultural Identity

'Having an extensive or rich sense of the past implies that we are able to clearly define ourselves and ground our identity in previous personal or group history' (Belk, 1990, p. 669). To continuously maintain or reconstruct cultural identity is one of the most common challenges in the fast-changing globalised world. Cultural nostalgia, in this sense, can be seen as an important mechanism to address this; as Davis (1979, p. 31) points out, 'nostalgia is one of the means – or, better, one of the more readily accessible psychological lenses – we employ in the never ending work of constructing, maintaining, and reconstructing our identities'. Design has inevitably been involved in this issue, since people possess designed artefacts not just for utilitarian reasons but also for identifying them with the extended self, as a major contributor to and expression of their identities (Belk, 1988). Apart from their commercial successes, the cultural nostalgia-driven design initiatives of Heckhausen and Xixi also fulfilled the social need of cultural identity reconstruction of both former GDR citizens and post-80s Chinese urbanites, following their respective political and economic revolutions. However, the opportunities for social design in relation to cultural nostalgia have not yet been fully explored by designers.

Many more projects in the public sector addressing the issue of cultural nostalgia and cultural identity reconstruction can be found across the world. However, among the people who strategically planned and initiated these projects, designers were rarely seen. In most cases, they only passively provided design services according to clearly predefined design briefs. In this sense, designers' outdated understanding of nostalgia may have been a major barrier for them to actively explore the positive effects of cultural nostalgia in designing for social benefits. But viewing this situation from another perspective may lead to additional opportunities in the future. The *New Bus for London* and *Singapore Memory Project* are two indicative cases. Both projects were initiated and funded by the government, carried out with extensive public involvement, and took advantage of cultural nostalgia to maintain or reconstruct cultural identities for their societies.

New Bus for London (NBfL)

The *New Bus for London* (NBfL) project involved the *Mayor of London*, *Transport for London* (TfL) and *Heatherwick Studio*. In relation to the design of NBfL, I had a chance to interview one of the designers of this project at Heatherwick on 13th September 2012. Because of their very strict rules on disclosing information about their design process, and perhaps also the high political sensitivity of the NBfL project, taking notes was the only means allowed for recording the interview.

Before establishing the case history of NBfL, I must firstly introduce the 'original' or the 'old' bus for London – *the Routemaster.* This vehicle is a unique type of double-decker bus that was designed for London's public transportation immediately after the Second World War. In addition to its red colour (in most cases) and double deck, this bus model's most distinctive feature is its open rear platform that allows passengers to hop-on and hop-off. Though originally designed for only fifteen years of use, the Routemasters eventually served the city for almost half a century (from 1958 to 2005). They had not only been the vehicles that transported people around the city every day, but also a cultural icon that carried the collective memories of Londoners, and a moving landmark that fascinated tourists. Due to several unsolvable technical issues (e.g. its 'high floor' was not accessible for wheelchairs; its engine did not meet the new emission standard), Routemasters were withdrawn from daily operation in December 2005 (BBC, 2005).

The Routemasters were then replaced by more modern double-deckers (i.e. what Londoners call 'the modern bus') and articulated buses (i.e. bendy bus). Though these buses were equipped with up-to-date technologies and able to provide better transport capacity and convenience, many Londoners felt dissatisfied with the precipitous disappearance of one of the greatest cultural icons in their daily lives. Consequently, when Boris Johnson was campaigning to be elected as Mayor of London in 2008, one of the pledges he made was 'to give Londoners a modern-day Routemaster that would stand as an icon of London' (Johnson, 2014, p. 7).

Boris Johnson was formally declared the new Mayor of London on 2nd May 2008 and two months later he launched the NBfL public design competition. The competition included two contests – one for amateurs and the other for professionals. From school children to professional automobile manufacturers (e.g. Aston Martin), the British public passionately exercised their imaginations to envision what the new Routemaster could be or should be. An exhibition of this design competition was hosted by the London Transport Museum in 2009. Ignoring the latest technologies, the majority of the design proposals displayed in the exhibition inherited the most memorable key features of the old Routemaster (e.g. red colour, double-decker, open rear platform). Although the TfL officially stated that they would not adopt any key ideas from this competition for the design of the eventual NBfL

Figure 11. An original Routemaster bus at Piccadilly Circus in 2005 (up: by Andrew Dunn);
An original Routemaster in the London Transport Museum in 2014 (down: by the author).

(Lewin, 2014), this public design competition might be well considered the front end study that informed TfL how they should form the design brief, based on the public's cultural nostalgic memory of Routemaster. After the competition, the public, the media and the Mayor himself chose to forget that the official name of the project was the NBfL, and started calling it '*The New Routemaster'* (Hill, 2015).

The Heatherwick Studio subsequently conducted the final exterior and interior design of the NBfL. My initial speculation about this design project was that the designers did an excellent job because they explored and understood the power of cultural nostalgia in maintaining cultural identity, and critically integrated both old and new design elements in the final design outcome. With very high hopes, I wished the NBfL could be a successful case of nostalgia-driven design in the public sector for social benefits. Thus, one of the original objectives of the interview

Figure 12. New Bus for London public design competition
(by the author in the London Transport Museum in 2009)

Figure 13. The New Bus for London on the street in 2012 (by the author)

with the designer at the Heatherwick Studio was to find out how they explored and designed for cultural nostalgia in this project. Apparently, however, the Heatherwick Studio was very cautious about the way I interpreted this project, and the designer refused to make any connection between this project and the word nostalgia. He corrected me at the very beginning of the interview about the name of this bus, by clearly stating that the bus they designed is called 'New Bus for London' which is engraved inside every one of them, rather than what most people called it – 'The New Routemaster'. He stated that they did not consider the cultural nostalgia of Londoners for the Routemaster in this project, but they were designing a brand

Figure 14. The original Routemaster (up: by the author in the London Transport Museum in 2012)
and the NBfL (down: by the author in 2012)

new bus for the city instead. As a matter of fact, many significant design signatures, including the open rear platform, were already in the requirements stated in the design brief from TfL. Nonetheless, visual references drawn from the Routemaster can be found in both the exterior and interior design of the new bus. Regarding this fact, the designer acknowledged that they did take inspiration from the design of the original Routemaster, because it would be simply stupid if they did not adopt those old design elements that still make perfect sense today. When discussing why the NBfL is called the New Routemaster by the public and media, the designer suggested perhaps it was because the overall experience that the NBfL brought to people, which they did not get from any other type of bus, was right and somehow reminded them of the excitement of riding the Routemaster.

Perhaps it is true that the Heatherwick Studio did not deliberately design for Londoners' cultural nostalgic experience, but the fact is that the return of 'Routemaster' has been widely discussed as a topic regarding cultural nostalgia and cultural identity by the British media and public. The right overall experience mentioned by the designer may well include cultural nostalgia as part of it. All the design elements adapted from the original Routemaster have served well as cues of cultural nostalgic memory, which made NBfL as a whole an effective memento. Alternatively, it might be another case of designers refusing to talk about their works in relation to

'nostalgia' because of their conservative understanding of this changing concept.

In the case of NBfL, unlike the three cases introduced in Section 2.4, the designers did not act as the passionate initiators and strategic planners of the project, but only as the design service providers. The issues that the designers addressed were confined within how to deliver a good design outcome according to the brief (e.g. style and usability), without touching on why Londoners would love such a new bus that inherits the design legacies of the Routemaster, or why not. In that sense, TfL, as the client, did the entire strategic planning for this project, and the brief they developed clearly informed the designers what design features of the old Routemaster should be retained in the NBfL.

Singapore Memory Project

Singapore is a city-size nation with multicultural citizens (i.e. Chinese, Malays, Indians and Eurasians) and a large proportion of international residents. Formally established in 1965, Singapore is also a very young nation. Facing such diversity in population, short national history and rapid changes that have involved reforming the landscape and lifestyle of the country, there has been a growing awareness of the need to construct and strengthen the cultural identity of Singaporeans. Facing this challenge, in 2011, the *Ministry of Communications and Information* of Singapore initiated a cultural memory project – the *Singapore Memory Project* (SMP). One major aim of this project, according to the SMP's introduction, is 'to engage individuals, communities, groups or institutions who have formed memories and content about Singapore, and would like to contribute them. The project hopes to build a culture of remembering, which will nurture bonding and rootedness' (Singapore Memory Project, 2011).

Facilitated by the *National Library Board*, the SMP is a highly participatory project. It has been externalising and internalising the unique Singaporean cultural identity through encouraging and allowing anyone who has cherished memories of Singapore to document and share. The contributors are not limited to Singaporean citizens, but include everyone who has spent part of their lives in this country. The SMP has created various channels to make it easy for people to contribute their memories, from more traditional ones through the distribution of posters and flyers to more contemporary uses of social media platforms, such as Facebook and Twitter (Liew & Pang, 2015). The memories of Singapore have been emerging in various forms (e.g. photographs, letters, ephemera, manuscripts, videos, and oral interviews) in both physical and digital formats. As shown on the home page of the SMP's official website, 870,856 memories have been recorded and are on open access (17 May 2016). In the written descriptions of these memories and viewers' comments, it is not surprising that 'nostalgia' is frequently mentioned to describe
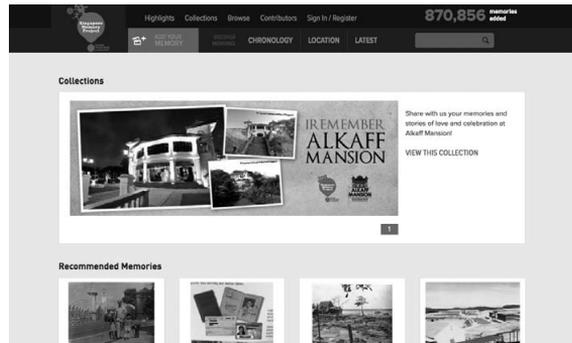
Figure 15. A screenshot of the Singapore Memory Project website
(http://www.singaporememory.sg/) 17 May 2016

both the contributors' and viewers' emotions. In fact, experiencing nostalgia that is both collective and personal is perhaps the most interesting aspect of this project that encourages the contributors and viewers to engage with it. Contributors share their personal nostalgic memories of Singapore, and then these personal nostalgic memories are externalised to become wider cultural nostalgic memories that resonate with the viewers. Meanwhile, a shared understanding of the cultural identity of Singapore is raised and internalised among ordinary Singaporeans. In his 2011 and 2012 National Day Rally speeches, the Prime Minister of Singapore, Mr Lee Hsien Loong, introduced and promoted the SMP to the world, and affirmed the importance of such a bottom up approach to defining what the Singapore Story is. He said, 'Individually, these are our life's experiences. Collectively, these bind together to become the soul of the nation' (Tang, 2013).

Apparently, there have been some good designers involved in the SMP, as evidenced by the well designed and functioning website and appealing presentation of the visual content. Again, however, designers were not those who initiated and strategically planned the project.

Healthcare

With its capacity for providing positive emotions, nostalgia comforts people, especially those in negative affective states and this positive effect has been explored for healthcare reasons, with dementia as the most prominent. Dementia refers to a wide range of symptoms including the decline in memory and thinking skills. Today, approximately 47.5 million people worldwide are living with dementia and 7.7 million new cases are expected to be diagnosed every year (WHO, 2015). Dementia frequently causes negative psychological reactions, such as depression and anxiety (Ballard et al., 2000; Enache, Winblad, & Aarsland, 2011; Lopez, Becker, & Sweet,

2005; Shub & Kunik, 2009; Weiner, Doody, Sairam, Foster, & Liao, 2002), which significantly decrease the life quality of the sufferers and lead to many problems for their families and carers. As the most obvious symptom of dementia, loss of memories starts with short-term forgetfulness and continues with forgetting more distant events. However, most dementia patients are able to recall and talk about their early lives (e.g. childhood and adolescence) until the final stage of the disease (WHO, 2012). Based on this fact, the nostalgic reminiscence approach has been experimented with and reported as an alternative treatment that improves the psychological wellbeing and life quality of dementia patients (Korte, Bohlmeijer, Cappeliez, Smit, & Westerhof, 2012; Lai, Chi, & Kayser-Jones, 2004; Serrani Azcurra, 2012). So far, cases of clinical implementation of nostalgia treatment have been mostly reported in the UK, among which RemPods and House of Memories are two highly notable ones.

RemPods

Invented by Richard Ernest in 2010, the *RemPods* (reminiscence pods) are a series of pop up nostalgic interior spaces and products designed for improving the wellbeing of elderly people living in care homes, particularly those with dementia (BBC, 2013). The RemPods include British living rooms in the styles of the 1950s, 1960s and 1970s, and also vintage British public spaces, such as old dance halls, pubs, cinemas and stores. Fully functioning nostalgic products (e.g. rewired old television and radio sets that play 1970s programmes) are also equipped in the RemPods (RemPods, 2015). These pop up nostalgic rooms were firstly adopted by the NHS (National Healthcare Service) care homes and day centres across Wales, where the pods have been proven to increase the wellbeing of the dementia patients and also the staff. In news reports, NHS staff members stated that the nostalgic environment transformed the clinic and care home environments to become much less foreboding and more calming for the patients. It also greatly encouraged patients to socialise by starting and engaging in conversations with each other and carers. At the same time, all these made the carers' job much less tough (Bevan, 2013). Despite his initial focus on the social benefits that RemPods could provide, Ernest successfully received £100,000 from famous investors Peter Jones and Deborah Meaden on the Dragons' Den programme. The funds helped him to commercialise this idea and be able to develop better RemPods to serve more dementia sufferers (BBC, 2013). Today, RemPods can be found in more than 150 NHS Trust, hospitals, care homes, day-centres and care charities across the UK.

House of Memories

The positive impact of nostalgia on dementia sufferers has also inspired a special service provided by the *National Museums Liverpool (NML) – House of Memories.* House of Memories was initiated as a training programme for the carers of people living with dementia. It utilises the collections, archives and stories held within the *Museum of Liverpool* to develop the carers' new understandings and skills, and to promote and enhance dementia sufferers' wellbeing and quality of life (NML, 2012). Apart from the training, the programme also provides various 'memory resources' and helps carers to arrange relevant nostalgic events for the people they are caring for. For example, a newly developed mobile app, *'My House of Memories',* allows people with dementia to browse a wide range of everyday objects from across the decades on a multimedia platform, which effectively triggers their nostalgic story telling. In addition, individuals can also save photos of those meaningful objects to their own memory trees, memory boxes or memory timelines (NML, 2015c). In addition, for running sensory rich reminiscence sessions, carers can also borrow NML's *'Memory Suitcases'* that contain physical objects, memorabilia and photos (NML, 2015b). With its rich variety of collections of bygone everyday objects, the Museum of Liverpool itself has also been serving as an effective and affective memory recollection space for people with dementia. Its service named *'When I Was Little'* helps young children and grandparents to enjoy their visit together and encourages the elderly to tell their childhood stories to the children (NML, 2015d). The service of *'Meet Me at the Museum'* turns the museum into a warm venue for the elderly to meet their old friends, and share their nostalgic memories again with abundant and various mementos collected by the museum (NML, 2015a).

With the rapidly increasing knowledge of the positive effects of nostalgia to societies and wellbeing, we can expect more relevant social design directions to emerge, and more projects for social good to build their innovations on the up-to-date understanding of nostalgia. Hopefully, more social designers will actively devote their efforts to such projects in the future.

2.8
Conclusion

This chapter has been developed to address three questions: 1) *How are nostalgia waves formed at the regional and global levels?* 2) *What role does design play in nostalgia waves? 3) What opportunities for both commercial and social design might accompany nostalgia waves?*

The nostalgia wave phenomenon can be seen as a collective manifestation of cultural nostalgia. Cultural nostalgia is based on cultural nostalgic memories, which

are proverbially shared, positively remembered, culturally cherished and valued by the members of a society. Such a social, cultural and affective experience can influence a large proportion of the population delimited by time and space, and can be evoked by those collectively recognised mementos of cultural nostalgic memory. Change is the ultimate driver or force for nostalgia. In this sense, the increasing need and desire for cultural nostalgia, as well as nostalgia waves, may be seen as a collective reaction to earlier revolutionary societal changes. The changes, relevant cultural nostalgia, and mementos all have their scopes of influence, which in turn define the scope of a nostalgia wave, or in other words, its susceptible population. A regional nostalgia wave occurs within a specific territory, and is typically forced by certain earlier radical change(s) that happened within the region. Existing at the same time with various regional nostalgia waves across the world, the global nostalgia wave is jointly impelled by global level changes, among which continuous technological changes have been serving as one of the key forces.

Designers, design activities and design outcomes (i.e. products, services and brands) are highly visible in any given nostalgia wave. Although a nostalgia wave is a result of the increasing collective need for nostalgia forced by earlier changes, it is the flourishing of nostalgic cultural offerings (or mementos of cultural nostalgic memory) that manifests this phenomenon. In a nostalgia wave, there are always a variety of creative and cultural practitioners devoted to creating mementos of cultural nostalgic memory without prior consultation. Despite often being criticised by the elite, I do not see that the flourishing of nostalgic cultural offerings means that the public is stupidly reluctant to accept progress, but is instead a way for them to ease the discontinuities caused by the earlier radical changes, and to maintain cultural identities and social connectedness. An analysis of the design cases in these nostalgia waves through the Hegelian dialectic pattern has revealed that the most important role of design in nostalgia waves is to create the synthesis. Designers flesh out the 'synthesis' through their creation of well-designed mementos of cultural nostalgic memory that not only brings back cultural nostalgic memories, but also preserves the merits of the changes, as best illustrated in the case of C60 Redux. Apparently, in this sense, an oversimplified copy or reproduction of something old, especially in only visual terms, may fail to ensure the evocation of cultural nostalgia. Therefore, the next chapter will situate nostalgia in the research tradition of designing for experiences, to enhance the understanding of how nostalgic experience is evoked through interacting with design outcomes, and broaden the awareness of designers regarding how they may more effectively and creatively design for nostalgic experience.

Design is a social, cultural and commercial act that explores and attempts to fulfil the needs and desires of individuals or collectives. Thus, it can be examined and

practiced from both market and social perspectives. In this sense, nostalgia-related design opportunities for commercial profits and social benefits can emerge in a parallel manner. In terms of the market model, the public's increasing nostalgia need has provided designers with great opportunities to start new businesses and revitalise dormant brands. From the social model perspective, on the other hand, a good understanding of the functions and positive effects of nostalgia may bring some new and interesting design opportunities to social designers. For example, apart from the psychological and physiological balancing functions of nostalgia, some more recent studies have also discovered that being in the state of nostalgia increases creativity (van Tilburg, Sedikides, & Wildschut, 2015; Ye, Ngan, & Hui, 2013). Despite the great potential of nostalgia, a doubt about nostalgia is still haunting the design community, which is evidenced by some of the cases presented in this chapter, and also the discussions on nostalgia that I had in various design forums. Some design practitioners and researchers are comfortable and even excited to talk about nostalgia as a positive concept, however many are not. They often hold a long established stereotypical view of nostalgia, which assumes it is backward looking, conservative, against innovation, and something that should be studied only by 'mercenary' or profit-driven consumer researchers. However, the connection between design and nostalgia, and the affective power and positive effects of nostalgia are not difficult to exploit beneficially in daily life. For some reason, such a doubt about nostalgia did not really prevent more market-oriented designers from actively leveraging its commercial potential. Unfortunately, however, it has been a major barrier preventing most social designers from exploring the concept. Apart from an outdated understanding of nostalgia, their great moral and elite superiority for being future-oriented, anti-commercial, and socially responsible may be another important reason. In this regard, the designer's moral and elite superiority, if we look at it from another perspective, is a burden and obstacle preventing them from exploring a controversial and changing concept.

To understand the value of the past, memories and nostalgia have become increasingly important when the world is changing at an ever-faster tempo. Life is a continuous and dynamic process constituted by the past, present and future. Focusing on the future and novelty encourages us to make changes, to explore the unknown and new possibilities that might benefit us someday. On the other hand, thinking of the past and familiarity establishes our root and identity, both culturally and emotionally, and is actually the basis for us to imagine the future. In this sense, imagination of the future and memory of the past are interdependent and equally important to individuals and societies. In terms of psychological wellbeing, great novelty may evoke excitement as well as intensive anxiety because of uncertainty (e.g. being the first human going to Mars). On the other hand, great familiarity and continuity

may provide comfort, calm and warmth, and may also lead to boredom (e.g. living a routine life in one place). But, novelty brings desirable excitement only when one's life has reached a certain level of continuity and familiarity. Novelty in a constant unstable and discontinued life does not necessarily evoke positive experiences. To some extent, the life of dementia sufferers is full of novelty as a result of the loss of memories. However, depression and anxiety are the major experiential outcomes of novelty without familiarity.

There is a pressing need for exploring the power of memory and nostalgia in design, if we consider design not only as a way to introduce better convenience and efficiency to our lives, but also about culturally and emotionally rich experiences and humanities. It is safe to say that the majority of designers are focusing on continuously bringing brand new things to change the world. I am not against that, but some, at least a small number, perhaps should also think of the past, memory and nostalgia as a balance, and help society to cope with the changes, strengthen our cultural roots, and provide more alternative lifestyle options. Although changes may lead to progress or regression, as long as they are sufficiently radical and rapid, life discontinuities and cultural identity crisis follow. It is impossible to accurately predict when and what the next changes will come and be. But two things will certainly follow. First, there will always be more changes in the future. Second, if the changes are radical and rapid enough, some years later, the relevant nostalgia waves will appear. Bearing this in mind, designers need to better understand nostalgia with a dynamic view, and be more open to exploring how to better facilitate nostalgic experience in appropriate contexts for its positive effects.

Chapter 3

Designing for Nostalgic Experience

3.1
Introduction

'Experience' is one of the key research topics in the contemporary field of design research, as evidenced by Norman (2008, p. xix) who states that currently 'the focus (of design) has shifted from objects to the experiences that result from interaction with them'. The concept of experience, in the sense of applied research, can be generally traced back to two roots, Human-Computer Interaction (HCI) as 'user experience' and Experiential Marketing / Consumer Behaviour Research as 'customer experience'. These two research traditions gradually became integrated into the field of design; Hekkert and Schifferstein (2008) use 'product experience' to conceptualise 'experience' in design research terms. They define product experience as 'the awareness of the psychological effects elicited by the interaction with a product, including the degree to which all our senses are stimulated, the meanings and value we attach to the product, and the feelings and emotions that are elicited'. While the 'product' here may be traditionally understood as a material artefact, such as a chair, a bicycle or a mobile phone, in the current chapter, I prefer to consider this term in a broader and more varied manner as Buchanan does. Buchanan defines design as 'the human power of conceiving, planning, and making products that serve human beings in the accomplishment of their individual and collective purposes' (2001, p. 9). In this definition, he further stresses that the 'products' refer to the outcomes of all kinds of design processes, including those that are tangible (e.g. physical artefacts), intangible (i.e. activities and services) and both (e.g. systems). Thus, the 'product experience' I discuss in this chapter is broad and may be derived from interactions with many possible design outcomes.

As a result of the growing emphasis on experience in the design field, experience-driven design has become an increasingly prominent design process and strategy, which 'takes an intended user experience as the primary objective of the design process' (Hekkert, Mostert, & Stompff, 2003, p. 114). However, experience is not a property of the product, but the outcome of highly subjective human-product interaction. What designers can do is to facilitate an experience, to design for it rather than design it (Desmet & Hekkert, 2007; Sanders & Dandavate, 1999). There-

fore, designing for a specific experience requires a clear and deeper understanding of the experience from a design perspective.

In the first chapter, I have introduced the current understanding of nostalgia as a fundamental, positive and functional human experience. In order to provide an explanation for its change in meaning and affective signature over history, I redefined nostalgia as an experience involving both remembered experience (i.e. nostalgic memory) and immediate experience (i.e. nostalgic experience), whose affective signature differs in different evoking conditions. Based on this, I have also argued in Chapter 2 that nostalgia needs to be reassessed by the design profession, and encouraged designers to explore design opportunities in relation to nostalgia for both commercial and social benefits. This chapter examines nostalgia as a subjective experience in the research context of designing for experience. Based mainly on deductive reasoning as well as some illustrative design cases, it concentrates on adapting existing knowledge on nostalgia drawn from other disciplines in order to inspire or inform designers about how to better design for nostalgic experience (e.g. beyond simply retro appearance). Questions to be addressed in this chapter include:

(1) How may interacting with products evoke nostalgic experience?

(2) What are the influential factors of nostalgic experience that designers need to be aware of?

Firstly, **Section 3.2** proposes a heuristic model for explaining the underlying process of design-evoked nostalgic experience (DENE). Secondly, in order to provide a comprehensive understanding of the experience from a design perspective, **Section 3.3** unpacks the interweaving of nostalgic experience into three distinct levels (experience of meaning, aesthetic experience and emotional experience) and highlights the relationship between nostalgic experience and nostalgic memory retrieval (explicit memory and implicit memory). **Section 3.4** then discusses the influential factors of nostalgic experience in two groups: 1) the user and usage context, and 2) the product and interaction. **Section 3.5** concludes the chapter and addresses the two research questions developed within this chapter. With major revisions, the writing of this chapter is based on a paper by Xue and Woolley (2011) that was originally presented at IASDR 2011 Conference in Delft, the Netherlands.

The Heuristic Model of Design-evoked Nostalgic Experience (DENE)

'Experience: as the complex interplay of situation, individual and product over time. It is a moment-by-moment view, with a focus on time and change' (Hassenzahl, 2007, p. 12). It suggests that the type of experience elicited by specific designed products is influenced by four determinants: 1) the product, 2) the user(s), 3) the interactive process and 4) the context. Only two of these determinants (product and the interactive process) can exert design influence directly. 'Although the product itself does not change, people and the usage context do, and so does the experience' (Katja Battarbee & Koskinen, 2008, p. 463). As a result, when designing for a particular experience, designers ideally first need to understand the experience, the potential user(s) and context, then to identify and create the most appropriate design elements or stimuli of the intended product experiences, as well as construct a positive interaction mode based on an empathic understanding of the user(s) (Koskinen, Battarbee, & Mattelmäki, 2003). A similar process for engaging nostalgic experience within the design process can also be envisaged. According to this theory and the importance of memory retrieval in nostalgic experience, a heuristic model explaining the underlying process of DENE is proposed (Figure 16). This model is based on existing knowledge on experience design, as well as knowledge on nostalgia drawn from other disciplines. Though the evaluation of experience is one of the key research directions in both design and psychology, the main focus of this chapter is how the model may inform and inspire designers, and serve as a generative source rather than an evaluative tool.

The model can be separated into three parts. When reading it bottom-up, it helps to explain the underlying process of design-evoked nostalgic experience. Firstly, the lower part focuses on the factors that may influence nostalgic experience during the human-product interaction process and its potential design cues. Secondly, explicit and implicit nostalgic memory retrievals stand in the middle as the bridge connecting the influential factors with the eventual nostalgic experience. The upper part is intended to provide designers with a clear and deeper understanding of nostalgic experience, and thus it analyses the experience from three different product experience levels. This model is also used to structure this chapter and the following sections demonstrate the three parts of the model top-down in detail.
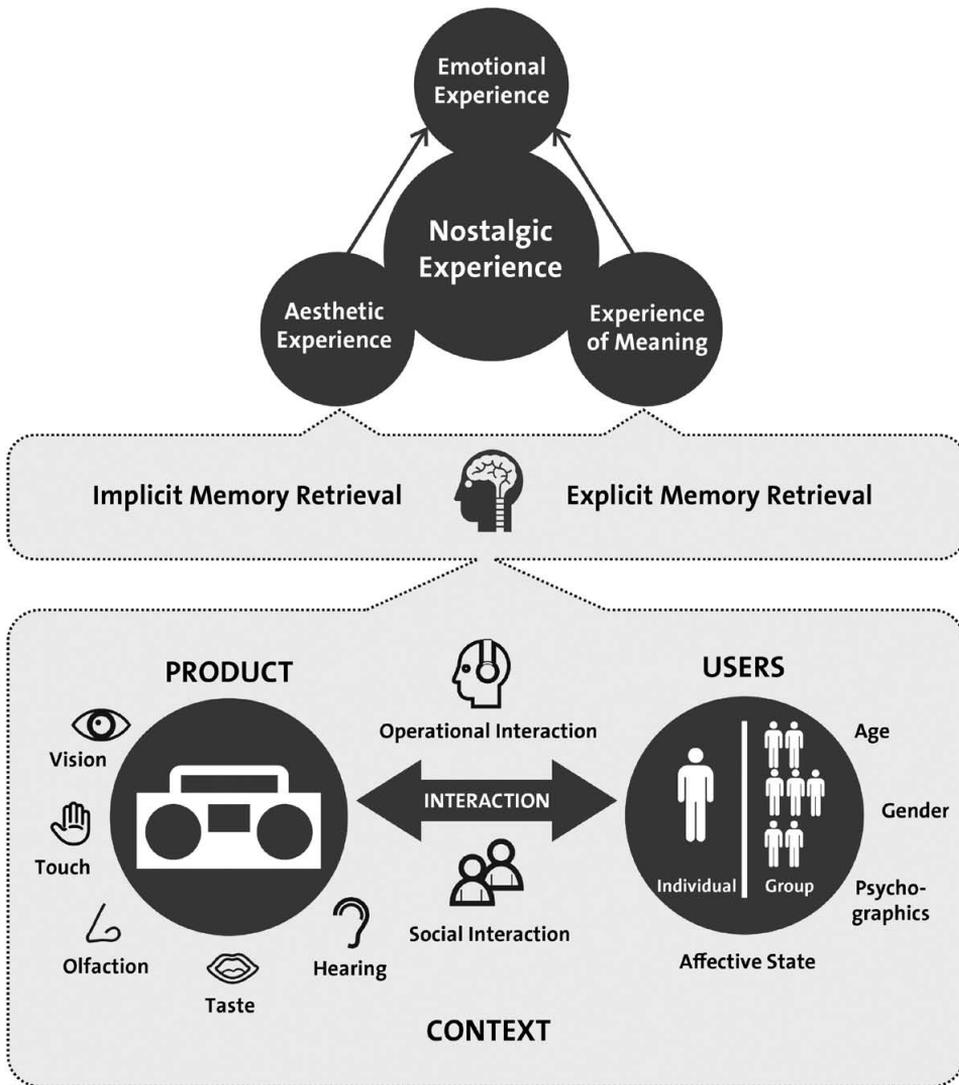
Figure 16. A heuristic model explaining the underlying process of DENE

The Three Levels of Nostalgic Experience

The framework of product experience developed by Desmet and Hekkert (2007) is used as the primary vehicle for analysing nostalgic experience in this model. According to Desmet and Hekkert, product experience refers to 'all possible affective experiences involved in human-product interaction', and such interaction includes not only physically using, operating and playing with a product, but also imagining, anticipating and remembering the physical interaction with the product (ibid., p. 58). In order to enable detailed analysis, this framework conceptually divides product experience into three levels: 'aesthetic pleasure, attribution of meaning, and emotional response' (ibid., p. 59). Because the three levels of product experience are highly compatible with the components of nostalgic experience that emerged from the analysis of its contemporary definitions, this framework is selected to guide the current analysis and be integrated into the heuristic model of DENE.

Firstly, experience of meaning involves the cognitive processing of meanings and stories that people ascribe to products and recall during human-product interaction. Secondly, aesthetic experience refers to the degree of sensory pleasure experienced through interacting with products. Thirdly, emotional experience addresses the types of emotion that the interaction results in. These three levels of product experience are closely interrelated. In particular, experience of meaning and aesthetic experience greatly determine the emotional experience that can be evoked (Desmet & Hekkert, 2007). Nostalgia, as a subjective experience, can be examined through these three levels, ultimately for the purposes of design. In addition, nostalgia is an experience that entails nostalgic memory retrieval, including both explicit memory (e.g. recalling a meaningful nostalgic episode) and implicit memory (e.g. feeling an aesthetic preference). Given the special relationship between nostalgic experience and nostalgic memory that I have discussed in Chapter 1, I view nostalgic memory retrieval as the mediation between products (i.e. designed mementos of nostalgic memories) and the three levels of nostalgic experience.

3.3.1

Explicit Memory Retrieval and Nostalgia as an Experience of Meaning

Explicit memory 'involves conscious recollection of previous experiences'. It is 'typically assessed with recall and recognition tasks that require intentional retrieval of information from a specific prior study episode' (Schacter, 1992, p. 559). In most cases, nostalgic experience involves explicit nostalgic memory retrieval, through

Figure 17. The author's Warrior trainers

which individuals experience (personal or cultural) meanings, which in turn results in a complex, simultaneous emotional experience. As introduced in Chapter 1, nostalgic memory is 'memory with the pain removed' and charged with positive emotions. It conveys to people how things used to be at an affective level, rather than providing precise factual information on what really happened in the past. Interacting with certain products may remind the individual of nostalgic memories, such as a loved one, a meaningful time period, or a funny personal anecdote.

I will use a personal experience as an example. I bought a pair of classic-style *Warrior* shoes (Figure 17) in 2010. From the 1950s to the 1990s, Warrior was the most popular basketball shoe model in my home country (China), but it had almost disappeared by the late 1990s. I had one pair of Warrior trainers during my childhood, and so did my parents during their childhood and adolescence. When I unexpectedly encountered Warrior shoes again in a local store in China in 2010, they vividly brought back my memories of playing basketball with friends in primary school, and my parents' emotional stories about their teenage years and their own Warrior shoes. Thus, I bought them without hesitation. I then called some close friends to have a reunion and showed them the shoes, as a result of which my friends and I recalled more amusing childhood anecdotes, which included but went beyond the shoes. In effect, a symbolic meaning had been assigned to the shoes representing our childhood. In the same interaction process, the shoes also aroused and evoked an outpouring of positive emotions.

Implicit Memory Retrieval and Nostalgia as an Aesthetic Experience

In contrast to explicit memory, implicit memory is an unintentional, non-conscious form of retention, and 'it is assessed with tasks that do not require conscious recollection of specific episodes' (Schacter, 1992, p. 559). This type of memory is also relevant for nostalgic experience, because nostalgia can additionally be considered as an aesthetic preference for products, which may be formed as implicit memory during one's formative period of development. It is worth revisiting the Warrior shoe example here: When I stepped out of the store wearing the shoes, putting the symbolic meaning aside, I realised that I actually felt that they looked very attractive, but I did not remember having such a strong liking for the appearance of the shoes during my childhood. Such a phenomenon may be attributed to the retrieval of certain types of implicit memory.

Schindler and Holbrook (1993) consider the formation of nostalgic taste or preference as a result of the joint actions of both *Mere Exposure* and *Critical Period* (the times in a person's life that are most influential and formative). Zajonc's mere exposure theory noted that the feeling of liking an object increases with repeated exposure (Zajonc, 1968), and Bornstein's meta-analysis (1989), to a great extent, verified Zajonc's hypothesis in concluding that there is a positive relationship between exposure frequency and aesthetic preference for the stimuli. Many psychologists have further interpreted the mere exposure effect as an implicit memory phenomenon (Schacter, 1987; Seamon et al., 1995; Squire, 1992). In other words, having a particular aesthetic preference or taste may result from the unconscious retrieval of implicit memory. Meanwhile, there is often a critical period (usually the stages of childhood, adolescence and young adulthood) in the development of a person's tastes or preferences. A heavy exposure to a certain product and brand during one's critical period is very likely to result in a lifelong aesthetic fondness for one or more multisensory features and interactive styles of a specific product or brand.

Nostalgia as an Emotional Experience

As discussed in the previous two chapters, nostalgia is viewed as a predominantly positive experience in the contemporary world, despite its negative historical connotations. The rapid changes in contemporary society have been increasing the need for, or predisposition to, nostalgia (i.e. longing for reliving some positively remembered past, at least mentally). At the same time, this need can nowadays be easily ful-

filled through sharing the nostalgic memory with relevant others almost anywhere in the world thanks to modern information and communication technology.

Based on the literature of emotion psychology (e.g. Arnold, 1960; Frijda & Schram, 1995), Desmet and Hekkert (2007, p. 62) claim that product emotions 'arise from encounters with products that are appraised as having beneficial or harmful consequences for the individual's concerns, that is, his or her major goals, motives, wellbeing, or other sensitivities'. The meaning of a product can be appraised as beneficial or harmful to one's concerns and in turn can result in particular positive or negative emotional experiences. For example, one may associate a desirable lifestyle with a high-quality coffee machine and therefore experience positive emotions from interacting with it. However, the same coffee machine may remind another of an obnoxious person and elicit negative emotions. Similarly, an aesthetic experience of a product can also lead to positive or negative emotions, when the product is perceived to be sensorily pleasurable or unpleasant. To a great extent, therefore, the meaning and aesthetic levels of experience determine the emotional level. Nostalgia, as an experience of meaning, serves several important psychological functions that are beneficial to human wellbeing. Meanwhile, nostalgia as an aesthetic experience can promote sensory pleasure, in line with the positive quality of nostalgia as an emotion.

3.4
Influential Factors in DENE

According to Desmet and Schifferstein (2011), there are two major challenges in experience-driven design: 1) how to determine what experience should be designed for, and 2) how to identify and design appropriate elements or cues to evoke the experience. This section is intended to answer similar questions by comprehensively examining the influential factors in DENE. Section 3.4.1 focuses on the influential factors regarding the users and usage context, which are generally beyond the influence of designers, but helpful when making design decisions. Section 3.4.2 discusses the influential factors or design stimuli for nostalgic experience that designers can directly utilise within their practice.

3.4.1

Influential Factors of the User(s) and the Context

Age

Age is highly relevant to nostalgic experience, which may be explained in three ways. First of all, nostalgia requires a positive or fond memory of a past situation that is perceived to be different enough from the present. Thus, one has to experience sufficient changes in life. Secondly, it is generally believed that people enjoy being nostalgic more when they are older, although empirical data has shown that nostalgia is a phenomenon that can happen across a variety of age profiles. Socioemotional selectivity theory (Carstensen, Isaacowitz, & Charles, 1999) suggests that when people are old enough, they start viewing time in their lives as finite and therefore shift attention from future-oriented goals to emphasise the meaning in life and 'awareness of limited time provides the sense of perspective that softens the experience of negative emotions and enhances the appreciation of positive aspects of life' (ibid., p. 171). This may indicate some reasons for why older people are more likely to experience nostalgia more frequently and to find it more enjoyable. Accordingly, in the early days of studying and consciously using nostalgia as a marketing promotional tool in the US, senior citizens were clearly targeted as one of the two major segments (the other one was baby boomers) for the strategy of appealing to nostalgia (Havlena & Holak, 1991). Thirdly, as a result of the social, technological and political changes, each generation or cohort (e.g. Generation X and Generation Y) grows up within distinctive social, political and technological contexts (Schuman & Scott, 1989) and forms particularly enduring preferences for products during its youth phase (Holbrook & Schindler, 1996). As an analogue of the phenomenon of imprinting (Lorenz, 1951), early personal experiences determining nostalgic taste and age-related preferences for many product types (e.g. pop music and automobiles) have been studied (Holbrook & Schindler, 1989, 1994). I therefore consider that age is the primary determinant that affects nostalgic experience. Studying target product user groups as different cohorts (age-related segmentations), may encourage designers to trace back to an appropriate historical period and locate the most relevant design elements that might be employed to enhance user nostalgic experience when appropriate.

Gender

Gender difference is another factor that might be considered when designing for nostalgic experience. Although clearly there is a danger in reinforcing and repeating gender stereotyping, in most normal cases, boys and girls still show different interests in objects (e.g. toys) and grow up with objects that display specific gen-

der characteristics. Design work that can evoke strong nostalgic experience for a group of males may mean little to females of the same generation and cultural background. Evidence of such gender differences in nostalgic experience has been found in several previous studies. For example, men tend to experience nostalgia through objects of action (e.g. vehicles), whereas women are more frequently inclined to consider objects of contemplation (e.g. textiles) a source of memories (Csikszentmihalyi & Rochberg-Halton, 1981). Schindler and Holbrook's study (2003) shows that females have no strong attraction to the car styles of their youth, but male subjects do. In a previous study authored by myself (Xue, 2008), the different responses towards the film and toy 'Transformers' between Chinese males and females in the same cohort were recorded. The male group displayed a much more intense interest in and nostalgic reaction towards the Transformers than their female counterparts. Thus, designers should expect significant gender differences in the types of product or design elements that evoke nostalgic experience.

Psychographics

Psychographic factors, such as individual personality (extraversion or neuroticism) and attitudes towards the past or nostalgia proneness, can also influence the evocation and enjoyment of nostalgic experience (Barrett et al., 2010; Holbrook & Schindler, 1996). For example, consider two male users; even within the same age cohort, one may more enjoy nostalgic experience than the other because he has a more positive attitude towards the past. Systematic measurement of the potential to experience nostalgia, such as the Nostalgia Index (Holbrook & Schindler, 1996) and the Southampton Nostalgia Scale (Routledge, Arndt, Sedikides, & Wildschut, 2008) have been developed in the fields of both business and psychology. These tools may be adapted and used by designers or design researchers to measure an individual's general predisposition to nostalgia.

The Present Affective State

As mentioned previously, the affective state (e.g. mood) of the users also determines how much nostalgic experience is valued. It has been discovered that people experiencing certain uncomfortable affective states (e.g. loneliness, anxiety and uncertainty) are more likely to desire nostalgic experience than those who are generally experiencing positive affect. The reason may reside in nostalgia's function of providing positive feelings and counteracting negative affective states.

The Context

Product experience is greatly influenced by the context of usage (Forlizzi & Battarbee, 2004; Hassenzahl, Schöbel, & Trautmann, 2008). The same product may provide extremely different experiences when used in different contexts. Thus, in order to better understand and eventually design for a specific experience, designers also need to understand the context of usage, or in other words, in what context a specific experience is more likely to be desired, evoked and enjoyed.

Mode of Use: Goal and Action Mode

According to Hassenzahl (2003), there are generally two different 'usage modes' – a *Goal Mode* and an *Action Mode* – that can be differentiated by describing the different mental states of users in relation to a product or system. When users are in goal mode, they concentrate on efficiently achieving specific tasks, describing themselves as 'serious' and 'planning', perceiving the product as a 'means to an end' (Hassenzahl, Kekez, & Burmester, 2002, p. 275). A professional bicycle racer attempting a new record in an important competition and a company employee trying to get his wake-up coffee as quickly as possible are good examples of users in goal mode. On the other hand, when users are in action mode, they consider efficiency and utility to be less important, and describe themselves as 'playful' and 'spontaneous'; the activity or the process of using the product is an 'end in itself' (Hassenzahl et al., 2002, p. 275). Let's consider the same bicycle racer and company employee as examples again, but in different contexts. When riding a bicycle on a family outing and making coffee with friends in an informal setting, they are in action mode.

Pragmatic and Hedonic Qualities

Meanwhile, a product can be perceived and evaluated along two dimensions by the users: *Pragmatic* and *Hedonic* qualities. 'Pragmatic quality refers to the product's perceived ability to support the achievement of "do-goals", such as "making a telephone call", "finding a book in an online-bookstore" or "setting-up a webpage"'(Hassenzahl et al., 2008, p. 473). Users' evaluation of pragmatic quality focuses on the utility and usability of the product, how much convenience and efficiency it can provide for them to achieve a specific goal. In contrast to pragmatic quality, 'hedonic quality refers to the product's perceived ability to support the achievement of "be-goals", such as "being competent", "being related to others", "being special"' (ibid., p. 473). This quality of the product shows its capacity to provide richer experiences that address more general human needs beyond instrumental ones, 'such as a need for novelty and change, personal growth, self-expression and/or relatedness' (ibid., p. 473). The importance of pragmatic and hedonic quality varies with different contexts of usage. In other words, it depends on whether

the user is in a goal mode or action mode (Hassenzahl, 2003). The pragmatic quality (e.g. efficiency, convenience, usability, etc.) of a product is normally valued more when it is used in goal mode. In contrast, users in action mode are more likely to derive greater enjoyment from hedonic quality and value it more.

Nostalgia Context: Hedonic quality and action mode

Hassenzahl (2003) breaks down the hedonic quality into three key attributes, which are **stimulation** (i.e. novelty and change, personal growth), **identification** (i.e. communication of identity to relevant others, relatedness) and **evocation** (i.e. keeping of memories, symbolising). Clearly, the ability of a product to evoke nostalgic experience addresses hedonic quality more than pragmatic quality, and therefore it is predictable that users in action mode enjoy nostalgic experience more. Let us consider the bicycle racer and company employee again. I would not expect them to desire and enjoy nostalgic experience when they are in goal mode as much as they do in action mode. Therefore, one of the most important considerations regarding the context of nostalgic experience is that nostalgic experience is more appreciated in a leisure context where enjoying the process of using is more valued than the outcome.

Being aware of this point is crucial in designing for nostalgic experience. Firstly, it indicates that designing for nostalgic experience is a more appropriate strategy for the design of lifestyle products and services that normally fulfil a relatively simple utility function, but are more often expected to have high sociocultural and hedonic types of value (e.g. home furniture, trainers, clothes, city bicycles, board and computer games, theme restaurants). Secondly, designers may often have to face criticism and questioning when designing something with enriched experiential quality, but without up-to-date automation that would ensure high efficiency and convenience. Having a clear notion of designing for experiences in different usage modes can help them to make appropriate design decisions, and, more importantly, to be more rhetorical.

Nostalgia Context – When: Transitional Period

Another perspective regarding the context issue is consideration of **when** and **where**. As discussed in the previous chapters, researchers generally claim that nostalgia is more desirable when life discontinuities and identity crises occur, which often result from significant changes or transitions at both individual and societal level. Negative transitions (e.g. loss of job, loved ones and home; economic crisis, terror threat, etc.) and even positive ones that are perceived to be great opportunities, at least in the short term, all possibly cause upheavals, uncertainties and new challenges (Aneshensel, Botticello, & Yamamoto-Mitani, 2004; Dyson & Renk, 2006; Haslam et al.,

2008). Thus, during the transitional periods when negative affect appears, nostalgia 'by being a stock of positive feelings, can ward off external threat or distressing thoughts.' (Sedikides, Wildschut, & Baden, 2004, p. 210). Designers may well expect that individuals (e.g. elderly people who may just have moved to a care home) and societies (e.g. China after a rapid and radical economical revolution) in such transitional periods would be more predisposed to nostalgic experience.

Nostalgia Context – Where: Local and Global

Whether a specific designed product can evoke nostalgic experience may also depend on the users' cultural background and where they grew up or lived previously. For example, the Commodore 64 computer was very popular as an 8-bit home computer in the USA and some European countries during the 1980s. Echoing the original visual design of the Commodore 64, a fully functioning PC incorporating the latest technology was launched in May 2011. This was identified as part of a fast-growing nostalgic cultural trend associated with the Commodore 64 and can be evidenced through many US- and EU-based websites and forums (e.g. gizmodo.com, archive.org). Reasonably, we should not necessarily expect such a trend in China, since no Commodore 64 model was ever marketed in China. The name and appearance of the Commodore 64 thus have no nostalgic meaning for the Chinese users, although of course some may still like it today, if only because of their interest in exploring and experiencing the esoteric historic and cultural influences behind the machine. Nonetheless, global mass media, the Internet and greater international mobility have perhaps resulted in a substantial increase in collective nostalgic memories that are shared across the world. We might therefore expect an increase in mementos of cultural nostalgic memory that can have a similar effect on people living in different cultures.

3.4.2

Designed Cues for Nostalgic Experience

The sensory features of a product and its interaction styles are the factors that designers can exert relatively direct influence on to facilitate product experience. Thus, I view the sensory and interactive features as designed cues for a specific product experience. For nostalgic experience in particular, since I believe that the real stimuli of nostalgic experience are actually nostalgic memories, a well-designed nostalgic product (i.e. a memento of nostalgic memory) can therefore be generally considered as a creative representation of one or a combination of several appropriately designed cues for nostalgic memory.

The (Multi) Sensory Cues for Nostalgic Memory

Deploying visual elements from old classic products is the most common design approach to eliciting nostalgic experience. For example, the VW New Beetle is often regarded as a typical design case that used visual elements to target nostalgic consumers (Brown, Kozinets, & Sherry, 2003). Its exterior design has very clear connections with the original Beetle, the VW Type 1 designed in the 1930s. Its high rounded roofline, sloping headlamps, large round taillights and many other body style features have their roots in the original Type 1 model and may trigger nostalgic memories. Such a way to consider and use visual cues in designing for nostalgic experience makes good sense, because vision is generally believed to be the dominant sensory modality, although humans do use all the senses to experience and interact with products (Fenko, Schifferstein, & Hekkert, 2010). Both ordinary people and design professionals often share the perception that vision is the most crucial sensory modality. When individuals were asked which sensory modality they would be most unwilling to lose, most of them answered 'vision' (Schifferstein, 2006). In the design profession, visualisation has always been considered as one of the key competences. To some extent, the importance of visual thinking in the design discipline may well have restricted the growth of design knowledge related to other sensory modalities and this may apply equally to designing for nostalgic experience. There seems to be a consensus among design practitioners that nostalgia inevitably requires making a new design look old, such as by giving it a retro and distressed appearance. However, it seems that such thinking may confine designers' aspirations and may eventually lead to oversimplified 'retro visual style' design without any new or innovative interpretations of the past. Thus, it is worth broadening the horizons of designing for nostalgic experience. Nostalgic experience is facilitated by vivid recall of nostalgic memory. If considering nostalgia an experience that results from interacting with designed products, it is not necessarily always or only evoked by visual inputs. In fact, multisensory design has attracted much attention from design researchers recently. In general, most effort has been devoted to exploring how to design for a holistic product or brand experience from a multisensory perspective (Fenko et al., 2010; Schifferstein, 2006; Schifferstein & Desmet, 2008). In this sense, designers should perhaps absorb the fact that other sensory modalities often stimulate more emotional and vivid memory retrieval than vision alone does. Thus, the other senses are also worth considering in the design process and may sometimes result in such preferable effects as pleasant surprise.

Auditory sense, for example, can be a very effective channel for evoking nostalgia. Hearing songs that were popular during one's adolescence can evoke emotionally charged autobiographical memories and a relatively strong nostalgic experience. The music often enables quick mental 'time travel' and reminds the person of

what events happened, who was involved and what state the person was in during that specific period. The sound does not necessarily have to be a melody but it must be able to offer a feeling of familiarity. For example, the sound of a Polaroid instant camera ejecting the photo is very likely to have a particular meaning for long-term Polaroid users, who frequently shot photos with the instant camera decades ago and may have discarded it after digital cameras dominated the market.

Olfaction (often together with gustation) is another potent sensory channel for evoking nostalgic experience, but has been largely ignored by designers. One of the most famous literary descriptions of the connection between olfaction and nostalgia is from the book *Swann's Way* by Marcel Proust (1922/1960), in which the writer describes a vivid retrieval of his childhood memory and a concomitant nostalgic joy evoked by smelling and tasting a madeleine biscuit dipped in linden tea. This has been conceptualised by psychologists as the 'Proustian Phenomenon' and is used to illustrate how the odour-evoked memories are more emotional than memories elicited by other sensory stimuli (Chu & Downes, 2000).

Psychology studies have shown that when comparing the memory-related subjective experiences evoked by different sensory stimuli of one item, odour-evoked ones are more emotive (R. Herz, Eliassen, Beland, & Souza, 2004; R. S. Herz, 1996, 1998; Hinton & Henley, 1993). With the help of functional magnetic resonance imaging (fMRI), a scientific explanation for such a phenomenon from the perspective of neuroscience has been established. Two areas of the human brain, the amygdala and hippocampus, are activated at the same time in the olfactory perception process. The amygdala is the emotional centre of the brain and the hippocampus plays a significant role in memory (R. S. Herz & Cupchik, 1995; Savic, Gulyas, Larsson, & Roland, 2000). The smell of Play-Doh, a children's modelling compound, is another good example as it has been popular among children in the US and global market for decades. A considerable number of adults have positive childhood experiences associated with the special odour of Play-Doh, and it has been selected by Americans born after the 1950s as one of the most important smells that frequently evoke nostalgic experience (Hirsch, 2006).

Designed Interaction Cues for Nostalgic Memory

Nostalgic experience could also be derived from interactions. In fact, it is particularly important to view experience from an interactive perspective in today's design research. Though the application of ergonomics broadened designers' role from simply generating attractive forms to making design outcomes more usable, it was the reflections on the design activities around digital technology that broadly made designers aware of the importance of addressing people's interactions with objects or systems (Moggridge, 2007). Perhaps because of this special relationship between

interaction design and digital media, 'there is a common misunderstanding that interaction design is concerned fundamentally with the digital medium', as Buchanan (2001, p. 11) noted. I again agree with Buchanan's broader view of interaction design that it is not only limited in the domain of the digital medium, but represents a more holistic and dynamic way of examining and doing design with the consideration of users' action on the timeline. Therefore, interaction design may be understood as any design activity addressing questions such as 'how do we plan an action, how do we create the concrete form of experience and how do we evaluate the consequences of action?' (ibid., p. 11). At the same time, designers have developed new concerns such as 'how people interact with products, how they use products as a mediating influence in their interactions with other people and their social and natural environments' (ibid., p. 14). Approaching designing for nostalgic experience from a perspective of interaction may thus provide designers with a new source of inspirations. In this section, I would like to discuss interactions as cues for nostalgic memory from two levels – *Operational Interaction* and *Social Interaction*.

Operational interaction

The term *'operational interaction'* refers to the way people use or operate a given product. At this level, the interaction happens simply between the user and the product. In order to evoke nostalgic experience through operational interaction, designers have to plan what people actually do with the designed artefacts or systems and try to integrate all the design elements (that would direct intended user action) into a timeline, whilst paying more attention to actions and behaviours, in addition to sensory features. One thing worth stressing here is that the concept of operational interaction includes but is not limited to the interaction on a screen that typically occurs with digital products. Tangible interactions involving physical artefacts, space, and bodily movement are also an important aspect.

Designers are often cautious about talking about nostalgia, because nostalgia is often criticised for its seemingly inevitable conservative features: that is, it looks at the past, not the future, and has a vintage appearance. Thus, a challenging question I raised in the pilot study of this research was *'would it be possible to make a futuristic looking digital product a nostalgia-evoking product?'* To answer this question, I conducted an experimental design project that focused on designing an operational interaction as the cue for nostalgic memory, and tested it (reported in Xue & Woolley, 2009).

In this design project, I chose a specific age cohort (i.e. born 1975-1985) in China to design for. Firstly, through interviews, I collected many nostalgic episodes that are broadly shared among the interviewees. These nostalgic episodes provided many potential cues for cultural nostalgic memory, including not only sensory ones

(e.g. image, sound etc.) but also many behaviours and bodily actions, which I paid special attention to.

Eventually, one behavioural cue for cultural nostalgic memory, *'drawing a watch on your wrist'*, was selected to be the interaction cue for nostalgic memory in this design project. Before the 1990s, products were in fairly short supply in China, and even the ordinary wristwatch was still an expensive luxury for most people. However, all children hoped to have their own watches. Therefore, parents all over Mainland China often drew watches on their children's wrists to make them happy. Children liked these fake watches and often competed for whose watch was the most attractive. Things then changed very quickly and most Chinese urban families could already afford watches for their children by the mid-1990s, and therefore 'drawing a watch on your wrist' became obsolete. This behaviour, however, was also forever embedded in the cultural nostalgic memory of Chinese people who were born during the late 1970s to early 1980s.

Making 'drawing a watch on your wrist' as the cue for nostalgic memory, which is a special operational interaction, I designed a transparent sticky watch that allows users to paint their own watches on their wrists. Thirty Chinese informants born during the late 1970s to early 1980s were invited to evaluate the design outcome through short interviews. The evaluation was divided into three steps, and three computer-rendered images of the product were shown to the informants successively in each step. The informants were asked to express their affective responses (through selecting one answer from unpleasant-excited, unpleasant-average, neutral/no emotion, pleasant-average, pleasant-excited) when they absorbed different features of this product in each step. They were also encouraged to describe the characteristics of the product and say what memories (if any) they recalled after seeing each image.

Firstly, the participants were shown the first image (Figure 18), which only communicates the appearance of the watch. Most informants described the appearance of this product using terms such as 'futuristic', 'high-tech' and 'science-fiction', and their emotional responses towards it were mainly 'pleasant average' and 'neutral'. After being presented with the second image (Figure 19), which shows what the watch looks like on the wrist, more informants indicated they liked the product better and felt more positive emotions towards it. Then, I showed them the third image (Figure 20), which introduces the unique operational interaction it enables – drawing the watch face by yourself. It put a smile on almost everyone's face, and most of them recollected their childhood nostalgic memories regarding this behaviour and shared it with me. They reported that the remarkable experience they had at that moment was the state of being 'pleasant-excited' with nostalgia. Though it was a quick experimental design tested with a small sample to investigate their antici-
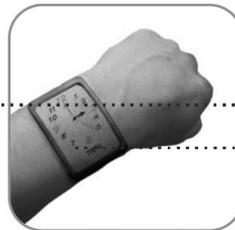
You can select two different styles

○ Digital

○ Analogue
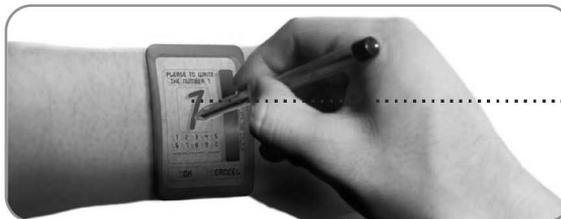
You can paint

The figures (1234567890)

The second hand

The minute hand

The hour hand

Figure 18. The first image that was shown to the informants
Figure 19. The second image shown to the informants
Figure 20. The last image shown to the informants

pated experience, the result assured me that if designers were to pay more attention to designing operational interactions that recall nostalgic memory, it would allow them to facilitate nostalgic experience without necessarily making the design outcomes appear old.

In addition, examining the relationship between obsolete **tangible/analogue interaction** and nostalgia may be equally inspiring. For example, a special nostalgia need for physicality can often be found in today's dematerialised digital world. As the technologies of many products have changed significantly with the passage of time, their operational interaction styles have also changed, though in some cases the familiar visual archetypes remain (e.g. refrigerators). In the same pilot study presented above, a couple of informants mentioned their memories of interacting with the old style telephone as an example.

By the early 1990s, the wired telephone with a rotary dial was dominant in China. Chinese urban dwellers interacted daily with rotary phones, although the telephone back then was a luxury product and in most cases all the households living in one apartment building could only share one telephone. By the mid-1990s the dominant archetype of the rotary dial phone was rapidly replaced by the push-button telephone, which became a must in every urban household. In the past five years, increasing numbers of Chinese urban families have removed their landline phones, since nearly everyone now has at least one mobile phone, and is also enjoying the much cheaper costs of calling through computer-Internet phone systems. Within twenty-five years, the population has gone through a change from rotary dial landline telephones to touch screen smartphones with Internet connectivity, and this change has made the old style of operational interaction a candidate for evoking nostalgic experience. A 26-year-old male Chinese informant reflected on his nostalgic feeling about rotary dial telephones thus:

> I haven't used any rotary dial-face telephones in real life for at least fifteen years! It was so interesting to use that kind of telephone … Da … da …. da, I love the way we use it. I love this feeling … I remember when I was eight years old, I often played with the rotary telephone in my home, though my parents did not allow me to do so, because a telephone was very expensive at the time and not every family owned one, it was a home luxury … I miss the way I used to operate the telephone, it reminds me of my childhood, when we didn't have digital products yet, life was so simple and authentic … Yes, it's not efficient but I really would love one in my bedroom, maybe not an original old telephone, but the dial-face is the most important.

Many modern digital products have subverted their original analogue interaction style, which often had a much longer tradition in the history of human society. There are fewer physical buttons and an increasing number of touch screens on newly developed products. One might admire the great efficiency and convenience offered by digital technology, but at the same time question the trend of giving up analogue totally or blindly dematerialising the world. Speaking from an emotional viewpoint, the rise of tangible interaction in recent years may be partially attributed to a growing passion through nostalgia for analogue interaction in the digital era.

Another relevant type of operational interaction that may be extremely valuable for designers to explore for evoking nostalgic experience is ***bodily interaction*** involving not only the movements of eyes and fingers, but also those of the whole body. For example, when an adult is dancing a series of special moves that he did hundreds of times in secondary school, happily jumping on the bed again like he used to do when he was four years old, cycling in the same position as he did when riding his first bicycle, these bodily interactions may magically recall nostalgic memories too.

Social interaction

Social interaction is one of the most common triggers of nostalgia found by psychologists (Wildschut, Sedikides, Arndt, & Routledge, 2006). This suggests that designers may also explore how products facilitate nostalgic social interactions as an interesting alternative to designing for nostalgic experience. Most design research in experience takes psychology, especially emotion psychology, as the basis and treats experience as an individual-centric issue. However, as Battarbee (2004, p. 16) noted, 'People have a desire to share experiences with their near and dear, wherever they may be and whether alone or in company' and they talk about their experiences of buying, possessing and interacting with a specific product to each other, and the product experience changes in such social interactions. Thus, she and colleagues (2004; 2008) claim that interacting with other people is the basis of making sense of experiences.

A sense of belonging and meaningful social bonds are fundamental needs (Baumeister & Leary, 1995). But the increasing mobility and life transitions (e.g. graduating from secondary school, studying or working abroad, moving to another city) in modern societies perhaps inevitably lead to the impairment or termination of important traditional interpersonal relationships, which can make people feel dispossessed and isolated (Colson, 1971). The role of social interaction (e.g. conversations between old school friends) in evoking nostalgic experience embodies the interpersonal characteristics of nostalgia and its function of enhancing social bonds. In terms of design, there are some products that may not be capable of trig-

gering nostalgic experience, either through appearance or usage, but instead facilitate meaningful social interactions. One of the most obvious cases is social media. For example, Facebook enables people to find, chat and reconnect with the friends they may have lost contact with for a long time. In addition, people post, share and discuss their old photos and memories to make nostalgia a collective experience. Such social sharing of nostalgic episodes is an effective way to evoke nostalgic experience. In turn the experience could help individuals to retain their identity, ease negative affects and increase the perceived ability to form, maintain, and develop interpersonal relationships successfully (Wildschut et al., 2006). It is a relatively new way of thinking for designers to design for nostalgic experience by enabling meaningful and nostalgic social interaction.

<div align="center">

3.5

Conclusion

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Battarbee and Koskinen (2008) identify three main strategies in the research area of design and experience, which are product-focused, human-focused and interaction-focused. The first strategy focuses on the product as the source of experiences or concerns the particular product features that may result in desirable experiences. The second concentrates on people and the experiences that they need and desire. The third strategy emphasises experiencing as an interactive process and often integrates both of the previous two models into the timeline of interaction. Typically, design researchers often deploy one of the three strategies to examine experiences in relation to design. However, in the current chapter, I examine one specific experience only, nostalgic experience, through all of the three lenses. Specifically, Section 3.3 adopted human-focused methods to discuss the characteristics of nostalgia as a subjective experience in terms of the meaning, aesthetic and emotional levels. Section 3.4 then used all three views to examine the users, contexts, products and interactions in relation to nostalgic experience. By doing so, this chapter answered two questions.

<div align="center">

How may interacting with the products of design evoke nostalgic experience?

</div>

Nostalgic experience is mediated by the recall of nostalgic memory. Interacting with designed products can evoke nostalgic memories, and therefore whatever designers can integrate into new nostalgic products (mementos of nostalgic memories) is what I call designed cues for nostalgic memory. 'Products' here broadly refer to the outcomes of all kinds of design including both tangible (e.g. physical artefacts) and intangible (e.g. processes and services). Generally speaking, two types of memories

may be involved in three different levels of nostalgic experience. Firstly the interaction with a product may evoke explicit memory (e.g. nostalgic personal anecdotes), which in turn facilitates nostalgia as an experience of meaning or attaches symbolic meaning to the product. Secondly, implicit memory is possibly also triggered by human-product interaction in an unconscious manner. It normally appears as pure aesthetic preference for a specific visual style that was more popular or widely experienced in the past. The fulfilment of nostalgic preference by the product is viewed as nostalgic experience at the aesthetic level. Finally, nostalgia as an emotional experience is predominantly positive, which may be attributed to the psychological and physiological functions of nostalgia to human wellbeing, as well as the quality of the other two experience levels.

What are the influential factors of nostalgic experience that designers should be aware of?

Nostalgia is a complex experience that can be influenced by many factors. In Section 3.4, I divided the influential factors of nostalgia into two categories. The factors in the first category regard the users (i.e. age, gender, psychograph, affective state) and the context of usage that cannot be influenced through direct design influences. The discussions around the first group may inform designers about to whom and in what context (i.e. mode of usage, when and where) nostalgia may be a more desirable product experience. The second category concerns the factors that designers could intentionally design to facilitate nostalgic experience, and the analysis was developed to explore how the product's multi-sensory features and interactive processes (i.e. operational and social interactions) might serve as effective and innovative cues for nostalgic memory. Apart from the most commonly practised retro visual style, auditory and olfactory features were proposed to be alternative sensory cues that could evoke nostalgic memory more vividly than visuals alone. Moreover, operational interactions (i.e. screen interactions, tangible/analogue interactions, and bodily interactions) that enable nostalgic behaviours (e.g. drawing a watch on your wrist, operating a rotary dial telephone, dancing and cycling in the same position one used to as a kid) and social interactions were discussed as cues that would be more likely to evoke nostalgic experience without being too obvious in terms of copying an old visual style, and which would provide more of a surprise.

To design for nostalgic experience seems to be easy, because designers can utilise many historical references. However, I believe it may be even more difficult to design something that evokes nostalgic experience appropriately than design something entirely new. The oversimplified use of historical references without sufficient originality, innovative inputs, or creative reinterpretation in a product could eventually lead to perceived inauthenticity, crude pastiche, careless and greedy exploi-

tation of cultural nostalgic memory, and therefore negative experiences (e.g. contempt) rather than nostalgia. Hopefully, this chapter could broaden designers' thoughts on how nostalgic experience can be elicited through more effective and creative approaches.

Part II

Nostalgia-driven Design Strategy

Chapter 4

The Phenomenon Studied
and Research Approach Used

Introduction

Viewing nostalgia as a sociocultural phenomenon and as a subjective experience, I have used Part I to integrate the latest knowledge on nostalgia generated in several other disciplines into design research, and build a broader stage for the analytical discussions on nostalgia as a contemporary design research topic in general. Part II, which is the third research strand of this dissertation, continues the examination of cultural nostalgia (i.e. true and vicarious nostalgia in a cultural context), and looks into its impact from the perspective of design strategy. Although, as discussed in Chapter 2, nostalgia-driven design has much wider potential for design research and practices in both market and social models, Part II narrows the scope down to the market model only, and more specifically investigates the impact of nostalgia-driven design on the strategic revitalisation of dormant brands. The empirical studies presented in Part II involve the analysis of primary data whose manifestation may appear to be full of individuality (e.g. informants' personal nostalgic narratives). Some readers may be confused by my clearly stated intention of studying cultural nostalgia and the strong individuality of the data. Thus, it is worthy clarifying it again at the beginning of Part II. As I have explained in Chapter 1, collectiveness and individuality are two qualities that interdependently co-exist in nostalgic memory and nostalgic experience. They are not mutually exclusive and can be separated only temporarily according to the researcher's primary focus.

Many dormant brands have made a very strong and successful return by strategically using design to reposition and appeal to the segments whose needs and desires (particularly non-utilitarian ones) are unsatisfied by available competing brands. In the current research, these revitalised bands are termed *'Phoenix Brands'*. Because their first-life products were mass-produced, well known, liked, used and remembered by certain population segments and generations, nationally or internationally, these phoenix brands and their obsolete products (especially 'classic' ones) have become carriers of cultural and emotional meanings and effective mementos of cultural nostalgic memories. As a result, nostalgia-driven design as a strategy has frequently been used to leverage such a competitive advantage and enable their rebirth.

The main aim of Part II is to extend the knowledge of nostalgia-driven design, especially as a brand revitalisation strategy, through case studies and learning from users, artefacts, managers and designers in real-life settings. The design outcomes in the selected design cases were all tangible products, but the cases were all examined from the perspective of experience-driven design at a strategic level. This ensured that the new knowledge generated in the studies is transferable to a wider context, such as designing for services and social purposes. The current chapter serves two functions: 1) to give a general introduction to the phenomenon studied and the three research questions addressed in Part II and 2) to systematically elaborate on the methodological basis and how the cases studies were selected and structured according to the research purposes and research questions.

Firstly, **Section 4.2** gives a generic narrative of the phoenix brand phenomenon examined in the subsequent chapters. Four statuses of brand (i.e. Birth, Dominance, Dormancy and Rebirth) are identified in the narrative, among which the statuses of dormancy and rebirth are further clarified in detail. **Section 4.3** identifies the important strategic value of nostalgia-driven design in revitalising a potential phoenix brand, and the limited existing knowledge on this topic. **Section 4.4** clearly presents the three research foci (i.e. subjects of study or units of analysis) and three accompanying research questions addressed in Part II. **Section 4.5** identifies the ontological and epistemological stances that match my initial understanding of reality and knowledge creation, as well as their relevance in relation to the current research. In particular, I adopt a social constructivist paradigm. Based on a review of case study research strategy (**Section 4.6**), **Section 4.7** then explains why a qualitative case study was chosen to be the research approach or research strategy for Part II. **Section 4.8** and **Section 4.9** introduce how one single case study and one multiple-case study were chosen and structured in order to answer the research questions. Please note that the data collection and analysis methods used are not presented in detail in the current chapter, but elaborated in the following chapters (i.e. Chapter 5 and Chapter 6) in which the single and multiple-case studies are reported respectively.

4.2
The Phoenix Brand Phenomenon

All brand owners want their brands to thrive forever. Accordingly, most of the studies related to brand management and branding strategy have been concerned with how managers can lead their brands to become dominant in the market, prevent them from aging, and ensure that their success is durable. However, one painful truth that all brands have to face is that there are so many factors in today's com-

plex, fast changing and highly competitive business environment that can easily make a dominant brand quickly lose popularity and become dormant or dead, no matter how popular and successful it is now (Lehu, 2004). When a previously successful brand becomes dormant, does it simultaneously become valueless?

As suggested by the cases that will be presented in the following chapters, some dormant brands actually can be reborn through nostalgia-driven design that leverages people's cultural nostalgia, and repositions the brand with high non-utilitarian types of value (i.e. sociocultural, hedonic and altruistic value). I term these successfully revitalised brands *'Phoenix Brands'*. I studied one potential phoenix brand (i.e. *Sarvis,* presented in Chapter 5) and three phoenix brands that have been successfully revitalised through nostalgia-driven design strategy (i.e. *Forever*, *Jopo* and *TDK,* presented in Chapter 6 and 7). Despite their different cultural roots and historical backgrounds, their brand histories in general can fit into the following storyline which I use here as a generic narrative of the phoenix brand phenomenon.

> Decades ago, a new brand and its products became well-known, liked, and popular, because it was associated with some originally invented products (or at least was perceived to be) based on state-of-the-art technologies and manufacturing. Its products normally provided better performance, efficiency or convenience, which were highly valued by the customers for mainly utilitarian reasons. Then, the number of customers quickly increased, and this brand became the dominant one in the local or global market. However, one decade or decades later, the offerings that it originally became famous for became unprofitable due to never-ending changes in the social, cultural and political environments, the competitive business landscape, technologies, and consumer needs and preferences. The brand was forced to change. It had to develop up-to-date new products in order to survive. Unfortunately, it failed. Its number of customers dropped quickly and it lost its dominant position to other brands. Finally it became dormant – consumers thought that it had disappeared or was dead.
>
> However, being dormant is not the end of the story. Some years later, its obsolete products (especially those classic ones) were rediscovered as collectibles or semi-collectibles and icons in local or global popular culture. Then, some passionate nostalgic lovers of the brand (e.g. designers, brand owners, marketers) initiated the brand revitalisation project. Through designing and launch-

ing new nostalgia-evoking products marked with this brand, they announced its return as a phoenix brand. Along with the revitalisation, ordinary people's nostalgic stories involving the brand spread widely through social media. Today, the brand has been successfully revitalised. It is favoured by certain consumer segments and has become profitable again, mainly because of the unique cultural and emotional meanings that people attached to it.

This generic description involves four statuses of a phoenix brand over time: **Birth, Dominance**, **Dormancy** and **Rebirth**. Birth and dominance are two statuses without many unclear aspects. By contrast, dormancy and rebirth are not only more important brand statuses in the phoenix brand phenomenon, but also need to be better defined and clarified for the purposes of further analysis.

A **Dormant Brand** means that its associated products, through which it originally became a household name, have been mostly or fully withdrawn from manufacture and sale, although they may still be found in online and offline and second-hand markets. The dormancy of a brand needs to be discussed contextually. For example, a dormant brand in a B2C market does not mean it has necessarily been dormant in a B2B environment. In a very recent example, consumers across a global market knew *Nokia* as a famous mobile phone brand, though it has always had other B2B market offerings, such as its data networking and telecommunications equipment. Microsoft acquired the Nokia mobile phone business in 2014 and stopped branding the subsequent smartphones as Nokia. Since then, Nokia has effectively become a dormant brand in the global mobile phone market. Mobile phones branded as Nokia may still be found in second-hand markets but are no longer widely distributed in the mainstream market.

A **Phoenix Brand** is a once dormant brand that has been reborn through utilising the cultural nostalgic memory associated with it. As a memento of cultural nostalgic memory, a phoenix brand is capable of evoking cultural nostalgia and capturing a certain zeitgeist. After its rebirth, utility is not normally the main reason for consuming its offerings, though this was often the case during the brand's first life. By contrast, the phoenix brand's importance in (personal and collective) memory and emotions, (local or global) culture and history, and its distinct and rebellious style are more likely to be reasons for the use of the brand. Therefore, to a great extent, phoenix brands can be seen as a type of iconic brand, as defined by Holt (2004). They are 'vessels of meaning and sentiment that are valued in society' (Holt, 2006, p. 357).

Apart from the ones I will present in Chapter 6, there have been many more successful phoenix brands. For example, *Converse* was originally a high-performance athletic (especially basketball) shoe brand that dominated the American mar-

ket from the 1920s to the 1980s. In the following decades, this brand lost popularity and became dormant, and the company eventually went bankrupt in 2001. After being acquired by *Nike* in 2003, Converse was shifted from a brand competing with performance to a brand offering unique cultural experience. Meanwhile, many potential phoenix brands are dormant today, such as Nokia as a mobile phone brand. For huge numbers of people worldwide (perhaps born before the 2000s), Nokia and its products were an essential part of their lives when the brand was dominating the global mobile phone market from the 1990s to 2010. For a large proportion of people, Nokia was the brand that introduced the mobile phone into their lives, and Nokia mobile phones were their first. It is very likely that people across the world associate their nostalgic memories with this particular dormant brand and formed a cultural nostalgic memory of Nokia, which is an extremely valuable intangible asset that Nokia still possesses. Nevertheless, to successfully leverage this asset requires a well-designed revitalising strategy to be appropriately executed at the right time. Rashly and recklessly exploiting this asset will definitely jeopardise or even kill the chance of a potential phoenix brand flourishing again.

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4.3
Brand Rebirth
through Nostalgia-driven Design

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Considering the ubiquity of rapid societal change and the consequent increasing need for cultural nostalgia, this phenomenon is not limited only to regions where locals might be experiencing intensive regional nostalgia waves, but is in fact observable globally. Nostalgic marketing has been studied and proposed as a common strategy to revitalise dormant brands (e.g. Holbrook, 1993b; Holbrook & Schindler, 1991; Naughton & Vlasic, 1998). Meanwhile, the increasing value of potential phoenix brands has been long recognised by marketing professionals. For example, *River West*, a company based in Chicago, focuses on acquiring dormant American brands for future business use when the time is deemed appropriate. As stated by the founder, these dormant brands have 'no retail presence, no product, no distribution, no trucks, no plants. Nothing. All that exists is memory' (Walker, 2008). In this regard, the value of a brand is customer-perceived rather than an inherent attribute, and therefore being able to provide desirable and memorable experiences is the key to revived value creation.

Marketing strategists may provide an abstract plan for revitalisation, but it is designers who create appropriate market offerings that evoke cultural nostalgia, and make the whole strategy work. A brand and its offerings (i.e. its products and services) are not separate, as customers may well experience a brand most directly

through the mental (e.g. anticipation and recall) and physical (e.g. use, clean, or simply look and touch) interactions with its products. In other words, products are the key interface between the brand and customers or users (Karjalainen, 2004). 'A customer's total experience with a product creates a mental image, a brand impression as strong as any image created through marketing techniques' (Montague, 1999, p. 17). Therefore, the desirable and memorable experiences that customers derive from interacting with a brand's offerings encourage them to ascribe long-term positive associations to the brand. The design of products from an experiential perspective with careful consideration of the long-term branding purpose has been utilised as a strategic tool by many companies (Karjalainen, 2004). Because potential phoenix brands have normally been invisible for a long time, the newly designed products maintain a unique responsibility in evoking cultural nostalgia and ensuring that the brands appeal to customers once more. Moreover, perhaps with good sensitivity to cultural trends and empathy to customers, it was designers, rather than marketers, who in many cases initiated the dormant brand revitalisation proposals and successfully implemented the nostalgia-driven design. However, nostalgia-driven design, as a crucial strategic tool for brand revitalisation, has never been studied from the specific point view of design.

4.4
Research Foci and Questions

The phoenix brand phenomenon involves three foci or subjects of study that are particularly relevant:

1) The (potential and revived) phoenix brands
2) The collectors/consumers/users and their nostalgic bonds with these brands
3) The designers who successfully transformed dormant brands to phoenix brands and their nostalgia-driven design processes

Based on the three foci of this phenomenon, three research questions relating to Part II are therefore formulated below.

Firstly, although I have suggested that some dormant brands have great potential to enjoy increasing value and be reborn as phoenix brands, it is obvious that not every dormant brand has equal potential. Thus, the first research question (RQ 1) of Part II is: *What characteristics of a dormant brand may indicate that it possesses significant potential to be revitalised through nostalgia-driven design?*

Secondly, nostalgic experience, like any other intended user experience, cannot be directly designed, but is facilitated instead by the design outcomes. In this

sense, one of the prerequisites of successful nostalgia-driven design is a clear understanding of the target users and their wider cultural context. Therefore the second research question (RQ 2) is: ***With the passage of time, how do people (collectors/users/consumers) form nostalgic bonds with potential phoenix brands and their obsolete first-life products, and perceive the change in value?***

Thirdly, obviously, transforming a dormant brand into a phoenix brand by means of a cultural nostalgia-driven design strategy is not only or simply about selecting a dormant brand with potential. There are many other aspects that could significantly influence the execution of this design strategy. In Part I, I have presented relevant new knowledge that was mainly synthesised from existing multidisciplinary literature, observations of relevant cases and design experiments. On the other hand, however, highly valuable but implicit wisdom often lies in the designers' thoughts, experiences and reflections. Thus, I endeavoured to make it explicit knowledge through a design case study approach. The third research question (RQ 3) is therefore: ***In the real-life context, how has cultural nostalgia-driven design, as a dormant brand revitalising strategy, been successfully deployed?***

With the phenomenon studied and research questions clearly presented, I will systematically elaborate on the methodological basis of Part II in the paragraphs below.

4.5
The Paradigm of the Research

All academic research needs appropriate methods to achieve the research aims. However, the choices of methods should be made on the basis of a clear understanding and selection of a suitable paradigm. The paradigm is 'the basic belief system or world view that guides the investigation' (Guba and Lincoln, 1994, p. 105). Although the selection of a suitable paradigm may occur implicitly, there is always one chosen (Kuhn, 1970). There is no single and universally correct paradigm that can exclusively dictate how research should be done (Bochner, 2002). In general, four major research paradigms can be identified: ***positivism***, ***post-positivism***, ***critical theory*** and ***constructivism*** (Guba and Lincoln, 1994). Each of them subscribes to fundamentally different views or beliefs on ontology and epistemology that invariably influence methodological and methods choices (Hesse-Biber & Leavy, 2010).

Ontology, as the science of being, concerns the 'form and nature of reality' (Guba and Lincoln, 1994, p.108) or the question of whether there is 'a "real" world "out there" that is independent of our knowledge of it' (Marsh & Furlong, 2002, p. 18). In general, there are two distinct ontological views – ***realism*** and ***relativism*** (Blaikie, 2007). Realists consider reality an objective and independent existence. Both positivist and post-positivist paradigms rest on such a view of ontology, though post-

positivists admit that reality cannot be perfectly captured by the inquirers 'because of basically flawed human intellectual mechanisms and the fundamentally intractable nature of phenomena' (Guba & Lincoln, 1994, p. 110). On the contrary, relativists assume that reality is not an absolute objective existence but a subjective and contextual creation of human consciousness. The constructivist paradigm takes relativist ontology as the fundamental basis in which realities are social and experiential constructions with multiple possibilities.

Epistemology as the science of knowledge concerns the question of 'what we can know about the world and how we can know it' (Marsh & Furlong, 2002, pp. 18-19). What epistemological point of view a researcher holds is greatly determined by his/her ontological stance (Guba & Lincoln, 1994). **Objectivism** establishes its epistemological view on the basis of the realist ontology, and 'assumes the investigator to be capable of studying the object without influencing it or being influenced by it' (Guba & Lincoln, 1994, p.110). Accordingly, positivists generally hold objectivist views on epistemology and stress that knowledge can be discovered through bias-free and systematic detached investigations. By contrast, the **subjectivist** approach is founded on relativist ontology, and assumes that 'any gaze is always filtered through the lenses of language, gender, social class, race, and ethnicity. There are no objective observations, only observations socially situated in the worlds of—and between—the observer and the observed' (Denzin & Lincoln, 2005, p. 12). Without denying that an external reality exists, subjectivist epistemology views knowledge as value-laden and requires one's reflections, interpretations and constructions.

For this dissertation, I adopt a **social constructivist paradigm,** that is, relativist ontology and subjectivist epistemology. Firstly, as explained in previous chapters, nostalgia is a subjective matter. Whether a given object can evoke one's nostalgic experience depends on whether the person has nostalgic memories associated with the object. Moreover, the affective signature of an immediate nostalgic experience is greatly influenced by the circumstances under which nostalgic memory is evoked. One object that triggers a flood of nostalgic memories and positive emotions for one person may leave another indifferent.

Secondly, I consider the information that I acquired from the interviews with users, designers, and managers to be crucial research data, including a wealth of nostalgic narratives. I deeply resonated with these nostalgic narratives during the interviews and the following data analysis. As an empathetic human being, a design professional, and a person who also shares the same cultural nostalgic memories that are addressed in some of the case studies, it is impossible for me to be absolutely objective, unlike, say, an astrophysicist studying the movement of celestial bodies. Therefore, I must acknowledge at the beginning that my observations on nostalgia-relevant phenomena were inevitably influenced by my own personal nos-

talgic memory, knowledge and emotions. Similarly, I assume that the initiatives to revitalise dormant brands were driven by the managers' and designers' interpretations, which were also greatly shaped by their memories or past experiences. Thus, the new knowledge is created (instead of discovered) through an interactive and collaborative process between me (the researcher) and the interviewed designers or design decision makers (the informants).

Therefore, based on my personal beliefs as well as the context and aims of the current research, I am committed to a constructivist paradigm and use it as the primary guide for the investigation. This also indicates that qualitative case study is a more appropriate research strategy than others, such as experimentation or quantitative survey. However, methodological choices should not be understood as something predetermined by the ontological and epistemological stances. They are also selected on the basis of the specific phenomena studied, together with the research objectives and research questions.

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4.6

Case Study:
Concept, Purposes and Types

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Yin (1994, p.13) defines a case study as 'an empirical inquiry that investigates a ***contemporary phenomenon*** within its ***real-life context***, especially when the boundaries between phenomenon and context are not clearly evident'. The case study approach normally 'relies on ***multiple sources of evidence***' (p. 13). It is an effective research approach when 'a ***how*** and ***why*** question is being asked about a contemporary set of events over which the investigator has ***little or no control***' (Yin, 2003, p. 9). The key characteristics of case study research are 'particularistic, descriptive and heuristic' (Merriam, 2009, p. 46). When pursuing research through a case study approach, a 'case' is 'an object to be studied for an identified reason that is peculiar or particular' (Hyett, Kenny, & Dickson-Swift, 2014, p. 2). In other words, a case can be regarded as an instance of a predefined broader phenomenon, by studying which researchers are able to gain holistic, detailed and deep understanding of the phenomenon.

Although case studies are mostly conducted in a qualitative manner, it is also true in the current research, being qualitative is not the decisive feature of case study research. Yin (1981, p. 58) points out that there is frequent confusion about 'types of evidence (e.g. qualitative data), types of data collection methods (e.g. ethnography), and research strategies (e.g. case study, experiment)'. Most, if not all, key writers of case study research agree that it should be seen as a research strategy, which implies neither the use of a particular type of evidence nor a particular data collection method (Merriam, 1997; Stake, 1995; Yin, 2003). In fact, it is common for

case study research to combine different research methods. In one case study, various forms of data or evidence can be drawn from all kinds of sources, such as documents, artefacts, interviews, and observations. Both qualitative and quantitative methods may be used to collect and analyse data (Yin, 2003), in line with Stake's view that the case study is defined by the interest in individual cases, not by the methods of inquiry used (Stake, 1995, 2000). 'Case study is not a methodological choice but a choice of what is to be studied. By whatever methods, we choose to study the case' (Stake, 2000, p. 435).

The case study approach has long been used in contemporary social science, though it is sometimes criticised for not being rigorous enough and limited. For example, Miles (1979) argues that case study should be limited to the exploratory phase of a piece of research. In contrast, many advocators, such as Yin (2003), believe that as long as a case study is carefully designed and used to address appropriate types of questions (i.e. how and why questions) in appropriate situations (i.e. real-life contemporary events over which the research has little or no control or influence), it can be a decent and effective approach to processing rigorous research.

The case study approach can be used to achieve different research purposes, such as providing detailed illustrations of phenomena, theory development, test and refinement (Voss, Tsikriktsis, & Frohlich, 2002). Accordingly, different types of case study research are categorised, and the categorisations proposed by Yin and Stake, reviewed below, are the most commonly accepted. In addition, longitudinal case studies can also be categorised, based on whether the identified events are happening currently or happened in the remote or recent past.

Yin (1981, 2003) argues that case studies can be categorised as exploratory, descriptive and explanatory. *Exploratory* case studies are generally aimed at identifying emerging research directions and questions, and generating initial hypotheses. *Descriptive* case studies are typically used to describe what a situation is like, and to establish a common language for the topic being investigated. *Explanatory* case studies are intended to clearly build and verify causal relationships between variables in the phenomena. However, it is worth noting that these three types of case studies are often mutually inclusive. For example, being illustrative and having a narrative quality are considered basic essentials for case studies, and therefore good case study research is always descriptive in nature. When there is little existing knowledge on the topic being studied, descriptive case studies may well serve exploratory purposes at the same time; likewise, descriptive and explanatory research purposes are also often achieved simultaneously.

In a different manner, Stake (1995) categorises case studies into three types: intrinsic, instrumental and collective. *Intrinsic* case studies emphasise the achieving of a comprehensive understanding of a particular individual case itself, with-

out much effort on theory building and generalisation. *Instrumental* case studies are often developed with the intention of uncovering broader knowledge about the phenomena of interest. In other words, a case study is instrumental when its purpose goes beyond simply understanding the case in its own right, but rather takes it as an example to illustrate a wider phenomenon and gain more insights into it. A *Collective* case study involves two or more comparative cases, in which researchers can explore similarities and differences.

In addition, according to the temporal differences of case studies, three types can be identified – concurrent, historical and retrospective. *Concurrent* case studies collect data when the identified events are happening in real time, and the outcomes are unknown. *Historical* case studies investigate events that took place in distant historical periods so that informants with direct experiences are no longer available. This type of case study therefore relies solely on the analysis of artefacts and secondary data (i.e. archive and documents). *Retrospective* case studies enquire into events that happened in the recent past, with the key common factors being '(1) The data are collected after the significant events have already occurred, (2) researchers have access to both first-person accounts and archival data, and (3) the final outcomes—which were presumably influenced by the variables and processes under study—are already known when data collection takes place' (Street & Ward, 2010, p. 824).

4.7
Rationale for Choosing a Case Study Approach

There are several positive reasons for choosing a case study approach for the current research, which are derived from the generally acknowledged strengths of a case study approach in relation to a review of the research questions.

First of all, this research is essentially looking for the answers to 'how' questions regarding a contemporary phenomenon. A case study approach is considered particularly suitable for this purpose. Secondly, rich contextual information, which explains and describes the phenomenon of cultural nostalgia and phoenix brand, is extremely important for the current research context. By collecting evidence from a wide range of sources (e.g. observations, documents, interviews and artefacts), a case study approach ensures that the context is comprehensively understood. Unlike an experiment, a case study is not conducted in a laboratory to replicate a specific phenomenon, but rather in a real-life context. Therefore case studies are considered a 'valuable way of looking at the world around us' (Rowley, 2002, p. 18). Thirdly, because design is a professional discipline, substantial amounts of knowl-

edge have not been articulated yet and can be generated from practitioners' experiences and reflections on their design cases. As a design researcher, I had no control at all regarding the design cases, but consider the case studies a valuable process of creating new design knowledge. Fourthly, in terms of spreading the new knowledge in design education after the study is complete, the case study approach has particular strengths in terms of connections between theory and practice, and therefore the knowledge obtained is often more easily utilised to inform future design practice and build a professional repertoire (Breslin & Buchanan, 2007). Hence, case study is the preferred approach.

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4.8

Research Design:
Single Plus Multiple Case Studies

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Single (instrumental) case studies and (collective) multiple-case studies have different advantages and merits. In simple terms, a single case study generally allows the researcher to conduct deeper investigation. A multi-case study facilitates literal or theoretical replication and cross-case comparison. Thus, whether to conduct a single or multi-case study very much depends on the research questions and research purposes. According to the three different but interrelated foci of the phenomenon studied, I designed *'single plus multiple'* or *'one plus three'* case studies to investigate the three relevant research questions.

The single case study was designed to address RQ 1 and RQ 2, as it is common to use a single case study to explore 'the basis for developing explanations of why a phenomenon occurs, and these may then be further investigated by applying them to additional cases in other settings' (Darke & Shanks, 2002, p. 115). The single case study served this purpose well and despite its exploratory nature, a research framework and propositions drawn from previous literature were used to lead the analysis.

The multi-case study was designed to further validate the initial findings regarding RQ2 drawn from the single case study, and to address RQ3 for the sake of cross-case analysis that enhances generalisation and explanation. Also, in the multi-case study, the selected cases were led by different designers from different cultures and for different target users or customers, which demonstrated diverse applicable contexts in real-life settings. Nevertheless, the cases share great similarities in their historical storylines of phoenix brands and cultural nostalgia-driven design processes, which enabled clear patterns to emerge. In addition, each case also independently suggested then confirmed emerging propositions and helped to reveal a more comprehensive picture of the phenomenon and better support further generalisations.

Due to lack of previous studies and established theories on this topic from a

design perspective, both the single and multiple-case study are *qualitative*, *retrospective*, *exploratory* and *descriptive* in nature. Nevertheless, this research is intended to go beyond simple descriptions of phoenix brands in order to better examine the phenomenon and to create new design knowledge that is useful for practising designers and design managers.

A reflection on how these case studies were conducted and analysed tells me that the research process was not a linear process but a continuous oscillation between the empirical and theoretical worlds. It started with observations of the phenomenon in real life. Then, based on the preliminary understanding of the phenomenon, I searched for and studied relevant theories, especially from the fields of sociology and consumer research. By comparing the theories with the observed reality, the most appropriate theories were selected and combined to form preliminary analytical frameworks. Although they were then used to articulate concepts and the frameworks to direct the search for empirical data, they were not closed in the beginning. I was expecting some unanticipated yet important aspects of the phenomenon to emerge from the empirical world with the accumulated new knowledge. Along with the data collection and analysis, the search for complementary theories was therefore in turn guided by the new findings that emerged from the empirical data collection and analysis, a process that never ceased until the end of the research. Readers may find that the writing style of the following chapters well demonstrates the continuous oscillation between the empirical and theoretical worlds throughout the whole research process.

4.9
The Selection of the Cases

4.9.1
The Initial Case Search, Selection and Classification

This dissertation as a whole is intended to examine cultural nostalgia (not only phoenix brands) and the phenomenon of nostalgia wave, and their impact on design in global terms. With such an intention, the initial case search and collection was not restricted to only the ones that had involved brand revitalisation, but more broadly included all cases that were obviously influenced by cultural nostalgia, valuable to design, and occurred in various cultures.

The initial search for cases was done in a relatively open manner, because there was no document that archived relevant cases with authority. Directly talking to people (mostly design professionals) from different cultures turned out to be a very

effective way to increase the pool of valuable cases. More specifically, after introducing my research topic and one case that made me experience cultural nostalgia as a post-80s Chinese (i.e. the Warrior shoes introduced in Chapter 3), it was common that the people whom I was talking to would passionately contribute one or more similar cases from their own culture(s) in return. Thanks to my international working environments and participation in many international design research conferences, I managed to have numerous such conversations, which provided me with information about tens of potential cases.

When I heard of a new case through word of mouth, I searched online for more information. As expected, most cases had enjoyed heavy media exposure, including traditional media and social media where people posted large numbers of nostalgic comments regarding the cases. This suggested that the cases were interesting and affective enough to attract journalists to report on them and readers to share their nostalgic narratives. Meanwhile, it also validated that a given case was really engaged with cultural nostalgia and a cultural nostalgic memory shared by a specific societal group. In addition, through my search for information on these cases, I often learnt about several other valuable cases that were new to me. Thus, it was also a way to increase the number of identified cases. During this process, the cases on which I could only find little information were eliminated. Then, based on the data (mainly secondary data) collected, each case was analysed in terms of the cultural background, historical storyline, design initiative or participation, and present social and commercial impacts.

Due to the limitations imposed by my foreign language skills and the available time and funding for the collection of primary data, I started paying more attention to the cases that were from cultures where I had personally lived or could possibly travel to for primary data collection. Besides, although it was not necessary for each case to involve a design initiative already, the influence (or the potential influence) of design was carefully considered to make sure that further data collection and analysis would yield new knowledge that is closely related to design. At this stage, therefore, those cases that I was not able to explore further, and in which the role of design was insignificant, were mainly kept as cases for potentially descriptive use only. After these steps of filtration, nine cases were selected to be further studied in order to meet the different purposes of Part I and Part II.

	Case Name	Originating Culture / Scope of Influence
1	Nengmao	China / Mainland China
2	Forever-C	China / Mainland China
3	Worrier	China / Mainland China
4	Routemaster and the New Bus for London	The UK / The UK
5	Ampelmann	Former GDR / Eastern Germany
6	Sarvis	Finland / Finland
7	Jopo	Finland / Finland
8	TDK Life on Record	Japan and the US / Global
9	C60 Redux	The US / Global

Table 2. A list of the cases that were selected and studied

What cases should be selected is greatly determined by the research purposes, questions, and propositions (if there are any). Although all these cases were studied through a similarly structured research process, they are used in different parts of this dissertation for different research purposes, and accordingly presented at different levels of depth. I have used the first five of them in Part II mainly for descriptive and illustrative purposes. In contrast, for the research purposes and questions of Part II, I selected the other four cases, and analysed and presented them as in-depth case studies in the following chapters. Sarvis was selected for the single case study, and Forever-C, Jopo, and TDK Life on Record for the multiple-case study. The following paragraphs describe the selection criteria for both the single and the multiple-case studies. Detailed case narratives can be found in the next two chapters, where the single and multiple-case studies are presented and analysed.

Criteria and Selection for the Single Case Study

The single case study was chosen to investigate the formation of a nostalgic bond between people and a potential phoenix brand. A single case study is normally conducted when the case represents a critical, extreme or unique instance of a phenomenon. In this regard, I was looking for a dormant brand whose obsolete products had extremely low value in terms of material, but had become increasingly collectible or progressively more culturally and emotionally valuable. In addition, since the units of analysis were people (e.g. collectors and non-collectors), the dormant brand and its obsolete first-life products, the case would not necessarily involve any designers or nostalgia-driven design processes. In fact, in the hope of exploring the basic mechanism of the nostalgic bond, I preferred to choose a dormant brand that had shown great potential, but had not as yet been revitalised through nostalgia-driven design. The final selection criterion for the single case was the accessibility of necessary data, available time and funding.

Accordingly, Sarvis was a great case for the single case study. Established in 1921, Sarvis was a legendary household name in Finland from the 1950s to 1970s, though its products were mundane household products made from relatively cheap material – plastic. It became dormant in the 1990s. Then, collectors of its original plastic tableware appeared around 2006. No one had proposed any revitalisation plan by the time the case study was conducted.

Criteria and Selection for the Multiple-case Study

In contrast with the single case study, the main purpose of the multiple-case study was to explore how nostalgia-driven design has been successfully conducted for brand revitalisation at a strategic level. Therefore, a strategic design process taking cultural nostalgia as the basis had to be involved in every possible case. According to the three following criteria, I further edited the list down to those that could be used to form a suitable structure for the multiple-case study.

Criterion 1: A Successful Design Initiative Involved

Here, I believe it is necessary to clarify how I defined a successful design initiative. I have to admit there is no well-established set of criteria that is absolutely objective, especially when nostalgia, such an emotional concept, is involved. The criteria that I used were subjective to some extent, but rational. Firstly, each selected case had been reported by journalists and emotionally discussed by the public in the culture

where it originated. This actually had been assured in the initial case searching process. Secondly, the designer(s) of each case had to feel proud of the nostalgia-driven design project, glad to make it an important page in his/her/their portfolios. Thirdly, I have to believe it is a successful case. As a design researcher, I have learnt to view designs through critical eyes. With a clear understanding of the background of each design case, if the design outcome failed to touch me in a natural and intuitive way, it would be extremely difficult for me to claim the design is successful. The three criteria of successful case judgements also ensured the case studies could be chosen and conducted appropriately and consistently. The first one enabled suitable designs to reveal themselves relatively easily when I was searching for the cases. The second one ensured that those designers were willing to actively participate in the research, discuss and provide detailed information about their relevant nostalgic memories, nostalgia-driven design processes and the final design outcomes, and therefore provided good access to the primary data. The last one maintained my passion for studying, reflecting on and writing up these cases during such a long journey.

Criterion 2: The Rebirth of a Phoenix Brand as a Result

As shown in Chapter 2, nostalgia-driven design can be used for many different purposes. I studied all the nine cases as single case studies through similar data collection and analytical methods. However, a cross-case analysis of all these nine cases would lead to an overly broad target and too extensive and overwhelming data for a single strand of doctoral research. In Part II, therefore, I decided to focus on only one purpose that nostalgia-driven design can achieve – revitalising dormant brands. In this sense, many successful nostalgia-driven design cases identified in the initial search were not considered suitable for the research purpose, because they did not revitalise dormant brands.

The four cases introduced in Chapter 2 all incorporated successful design work with and for cultural nostalgia. The Nengmao Store exploited the advantage of China's nostalgia wave and acquired inspiration from those long lost, but nostalgically remembered everyday artefacts from China's planned economy era. The Ampelmann was a newly established brand with embedded GDR cultural nostalgia at its core. C60 Redux had no commercial relevance but only attempted to provoke the viewers' critical reflections on the transition from analogue to digital in their lives. The NBfL was a case in the public sector with potential influence on maintaining and strengthening London's cultural identity.

Criterion 3:
A Collection of Phoenix Brand Cases from Diverse Cultures

The final criterion was to ensure the phoenix brand phenomenon would be examined under diverse cultural contexts. The contents and objects of cultural nostalgia may vary in different cultures, but the phenomenon is ubiquitous and the generic manifestations are common to all. The cross-case analysis of several phoenix brands from diverse cultures would enable a deeper understanding of the essence of the phenomenon. Therefore, the cases were also preferred to be from different cultures, with at least one of them having a global sphere of influence.

According to the three criteria presented above, three successful cultural nostalgia-driven design cases that revitalised dormant brands from China (*Forever-C* by *Crossing*), Finland (*Jopo* by *Helkama Velox*) and the US and Japan but with global influence (*TDK Life on Record* by *Ziba*) respectively were chosen to form the multiple-case study.

4.10
Conclusion

Chapter 4, as a general introduction to Part II, has served two main functions: 1) to give a general introduction to the phenomenon studied and the three research questions addressed in Part II and 2) to systematically elaborate on the methodological basis, and how the case studies were selected and structured according to the research purposes and research questions.

Firstly, it described the phenomenon studied (i.e. the phoenix brand) through a generic narrative drawn from the cases, and identified four brand statuses involved in the phenomenon (i.e. Birth, Dominance, Dormancy and Rebirth). Once the phenomenon had been clearly described, the chapter specified the three research foci in the phenomenon, based on which three research questions were generated to direct the research design.

> RQ 1: What characteristics of a dormant brand may indicate that it possesses significant potential to be revitalised through nostalgia-driven design?

> RQ 2: With the passage of time, how do people (collectors/users/consumers) form nostalgic bonds with potential phoenix brands and their obsolete first-life products, and perceive the change in value?

RQ 3: In the real-life context, how has cultural nostalgia-driven design, as a dormant brand revitalising strategy, been successfully deployed?

Secondly, the second half of this chapter has been used to present the methodological issues of Part II, including the paradigm, research strategy and research design. Specifically, this research adopted a social constructivist paradigm, and used qualitative case study as the primary research strategy. The research was designed through a combination of a single case study and a multiple-case study. Based on the different research purposes and research questions addressed, the two case studies developed different case selection criteria, according to which one case from Finland (i.e. Sarvis) and three cases from China (i.e. Forever-C), Finland (i.e. Jopo), and Japan and the US with a global scope of influence (i.e. TDK Life on Record) were eventually used to construct the single and multiple-case studies respectively. The specific methods used for each case study are presented in Chapter 5 and Chapter 6.

Chapter 5

The Formation of Nostalgic Bonds

5.1

Introduction

This chapter is a single case study on *Sarvis* (a once successful Finnish brand of plastic household products), which I consider a potential phoenix brand in Finland. As I have described in Chapter 4, phoenix brands and their first-life products generally share a similar storyline. These branded products were initially designed and produced as common and high-volume utilitarian commodities for the mass market. After many years of widespread regular use, the products and their associated brands were discarded, possibly due to lifestyle changes, aesthetic trends or failed market competition, and were replaced by products with new technology. However, one astonishing fact is that many years later some of these obsolete products and brands are often rediscovered and valued as collectibles. Collectors may have perceived them as objects with increasing value, and often spend considerable time and effort locating more items, displaying and taking care of them. Such a phenomenon can be found in many different cultures, and the increase in perceived (sociocultural and hedonic) value is often a sign of the potential of a dormant brand to be revitalised as a phoenix brand. Sarvis is one such case in Finland. Its obsolete plastic cups and plates, introduced during the 1960s and 1970s, have become increasingly collectible in recent years. Despite this change in the Sarvis brand, the current owner of the brand, *Orthex* (a major Finnish plastic product manufacturer), has no plans to revitalise it. Therefore, this case did not involve any nostalgia-driven design initiative. Nevertheless, it provides a valuable probe into the process and effect of nostalgic bonding which is the underlying mechanism or prerequisite for the rebirth of a phoenix brand through nostalgia-driven design.

By studying the case of Sarvis, this chapter is intended 1) to initially probe the possible common characteristics of the (potential) phoenix brands, 2) to clarify the formative process of the nostalgic bond between people and the potential phoenix brand, and 3) to understand the change in the perceived value of phoenix brands in terms of both the volume and hierarchical structure. The case combines Holbrook's Typology

of Perceived Value (1996), Rubbish Theory (Thompson, 1979), and Memory Retrieval - Nostalgic Experience Model introduced in Chapter 3 as a theoretical and analytical framework. By analysing qualitative data collected through ten in-depth interviews with both Sarvis collectors and ordinary consumers (non-collectors of plastic tableware), as well as online (e.g. blog articles) and offline documents (e.g. Sarvis brand books), this chapter answers the following two research questions of Part II:

> RQ 1: What characteristics of a dormant brand may indicate that it possesses significant potential to be revitalised through nostalgia-driven design?

> RQ 2: With the passage of time, how do people (collectors/users/consumers) form nostalgic bonds with potential phoenix brands and their obsolete first-life products, and perceive the change in value?

This case study was conducted in collaboration with Dr Sari Kujala, who at the time was a post-doc researcher with a psychology background at the Department of Design, Aalto University. She provided generous help in research design, data collection in Finnish, and data analysis from a psychology perspective. With major revisions, this chapter is based on our paper (Xue & Kujala, 2012) originally published in the proceedings of The *8th International Design and Emotion Conference* in London in 2012.

5.2
Brand and Perceived Value

Apart from those concepts introduced in the previous chapters, this case study and also the following ones involve the discussion of the brand and its value (from a customer-oriented perspective in particular). Thus, this section is used to clearly define these two concepts.

The American Marketing Association (1960) defines a brand as 'a name, term, sign, symbol, or design, or a combination of them, intended to identify the goods or services of one seller from among a group of sellers and to differentiate them from those of the competitors'. From a company-oriented perspective, this definition stressed the earliest identified purpose of branding – differentiation – but neglected consumers' influence on the creation of brand value. In contrast, Gardner and Levy (1955, p. 35) argued that 'a brand name is more than the label employed to differentiate among the manufacturers of a product. It is a complex symbol that represents a variety of ideas and attributes. It tells the consumers many thing, not only by the way it sounds (and

the literal meaning if it has one) but, more important, via the body of associations it has built up and acquired as a public object over a period of time'. Such a customer-oriented conception of brand illustrates another important purpose of branding – adding value (de Chernatony & Dall'Olmo Riley, 1998). Taking both company-oriented and customer-oriented views into consideration, Wood (2000, p. 666) defines a brand in a holistic manner as 'a mechanism for achieving competitive advantage for firms, through differentiation (purpose). The attributes that differentiate a brand provide the customer with satisfaction and benefits for which they are willing to pay (mechanism) … Competitive advantage for firms may be determined in terms of revenue, profit, added value or market share. Benefits the consumer purchases may be real or illusory, rational or emotional, tangible or intangible'.

The concept of 'brand equity' is created as an attempt to explain the relationship between a brand and its customers (Wood, 2000), and used to define the value of the brand (Jones, 2005). It concerns what consumers know about, what they associate with, and how they respond to the brand. Thus, brand equity 'occurs when the consumer is familiar with the brand and holds some favourable, strong, and unique brand associations in memory' (Keller, 1993, p. 2) In terms of the differences between 'brand equity' and 'brand value', brand management researchers conceptually separate them by suggesting that 'brand equity represents what the brand means to the customer, whereas brand value represents what the brand means to a focal company' (Raggio & Leone, 2007, p. 381). In this sense, brand equity can be also understood as the customer-perceived value of the brand. In the current research, because the value of the brand is only discussed from a customer-based perspective, and the intended readers are mainly design professionals, instead of 'brand value' or 'brand equity', I prefer to use the term '(customer) perceived value' in the following analysis and discussions, to avoid ambiguous and excessive discussion of brand management concepts.

There have been various arguments in relation to understanding how customers perceive value. Simply speaking, Zeithaml (1988) views perceived value to be grounded in the exchange; Richins (1994) argues that perceived value is grounded in possession; whilst Woodruff (1997) claims that perceived value is grounded in use. Most holistically, Holbrook (1994, p. 22; 1996, p. 138; 1999, p. 5) proposes that perceived value is grounded in experience, and defines it (actually termed 'customer value' or 'consumer value' in his works) as 'an interactive relativistic preference experience'.

I strongly agree with this definition and adopted it for the research, because it is a dynamic way of seeing value creation and perception that includes every stage of customer experience (i.e. anticipated consumption, purchase experience, consumption experience, remembered consumption proposed by Arnould, Price, & Zinkhan, 2004), whereas the other alternative perspectives only cover one or two

stages (Turnbull, 2009). In a more recent work of Holbrook (2005), he explains the definition of perceived value in detail thus:

> *Specifically, (1) customer value is interactive in the sense that it involves a relationship between some subject (a consumer) and some object (a product). Further, (2) customer value is relativistic insofar as (a) it reflects a comparison of one object with another, (b) it differs between one person and the next, and (c) it depends on the situation in which the evaluation occurs. Given such considerations, (3) customer value embodies a preference variously referred to by such terms as like/dislike, favourable/unfavourable, good/bad, positive/ negative, pro/con, or approach/avoid. Finally, (4) such an interactive relativistic preference attaches not to the object itself but rather to the relevant consumption experience (involving fantasies, feelings, fun, and other aspects of customer satisfaction from product usage)* (Holbrook, 2005, p. 46).

In addition, 'value' and 'values' are two confusing concepts that should be clarified at an early stage. As noted by Holbrook (1994, 1999), marketing and consumer researchers often mistakenly use the terms 'value' and 'values' in an interchangeable manner, though they are two distinct concepts. 'Value' (singular) represents the outcome of a subjective preference evaluation, whereas 'values' (plural) refers to the implicit personal standards, criteria, rules, beliefs and goals on which the evaluation depends. Namely, according to their subjective values, people perceive the value of an object (e.g. a product, a service or holistically as a brand) or the benefits that can be drawn from interacting with (e.g. thinking of, purchasing, using, playing, showing, possessing) the object. Both concepts of (perceived) value and (people's) values are mentioned and discussed in the following chapters. For clarity, I use terms such as 'criteria' or 'beliefs' to replace 'values'.

5.3
A Brief History of Sarvis

Founded in Tampere in 1921, Sarvis was Finland's first plastic product manufacturer. With the booming of the plastics industry after the Second World War, Sarvis became increasingly popular and soon dominated the market. In the 1960s, millions of Sarvis household products were sold each year in Finland, a country with only 4.5 million inhabitants at the time. Following the emergence of a new design lifestyle in Finland, the late 1960s to 1970s turned out to be the golden age of Sarvis prod-

Figure 21. Sarvis' Katrilli (1969) and Pitopöytä (1976) being sold at the Helsinki Retro and Vintage Design Expo 2014 (photo by the author)

ucts, especially in terms of its plastic tableware (Koivuniemi & Tarna, 2004). During this period, Sarvis introduced the two most influential ranges of plastic tableware in Finland: **Katrilli** designed by Tauno Tarna in 1969 and **Pitopöytä (Easy Day)** by Tarna's teacher Kaj Franck in 1976.

However, the international oil crisis in 1973 and the emergence of environmental concerns regarding plastic material effectively halted the ever-increasing development of the plastics industry and Sarvis faced a major decline in the late 1970s (Jokinen, 2001). In 1985, Sarvis was sold to Hammarplast (a Swedish company) and was subsequently bought and sold many times by different Finnish and Swedish companies (e.g. Hackman, Plastumgruppen AB), whilst the most important machinery and moulds for Sarvis products were moved to Sweden (eventually lost to posterity). The Finnish Sarvis factories were all closed in the 1990s. Sarvis had become increasingly invisible in the Finnish market since the 1980s, until around 2006 when collectors of Sarvis tableware first appeared (Valtonen, 2006).

5.4
Theoretical Framework

5.4.1
Holbrook's Typology of Perceived Value

As shown by the narrative of Sarvis, this potential phoenix brand had gone through three successive statuses – birth, dominance, and dormancy. The reason why it is considered a potential phoenix brand is because its obsolete first-life products have become collectibles or semi-collectibles (i.e. collectible objects that are not

Extrinsic

Utilitarian Value

Sociocultural Value

Self-oriented

Other-oriented

Hedonic Value

Altruistic Value

Intrinsic
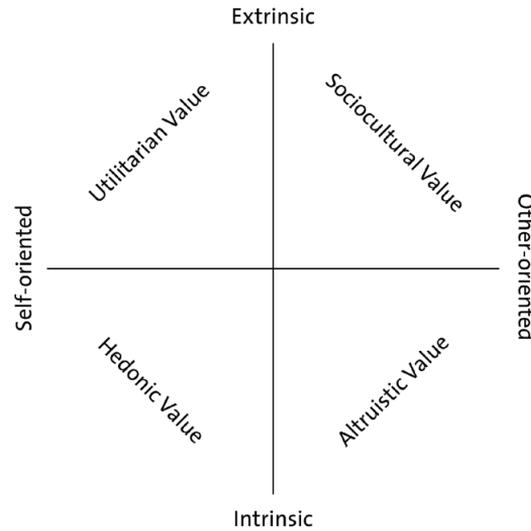
Figure 22. Four types of perceived value based on Holbrook's typology

removed from use), though not everyone values them. From the collectors' perspective, the value of the Sarvis brand has been changing throughout the brand's history, not only in *volume*, but also in *hierarchical structure*. In order to facilitate a fruitful analysis on such a change in value, this section adopts Holbrook's typology of perceived value as an analytical guide.

Based on his definition of perceived value, Holbrook (1999) further pinpoints three underlying dimensions of perceived value: *1) extrinsic* versus *intrinsic, 2) self-oriented* versus *other-oriented and 3) active* versus *reactive*. In the first dimension, the extrinsic value is derived from the attributes of an object that serve instrumentally as a means to an end, whereas intrinsic value takes an object as something that is appreciated for its own sake or an end-in-itself. Secondly, self-oriented value results from one prizing an object selfishly depending on the effect it has on oneself, while other-oriented value derives from how it affects others who one cares for or how they might respond to it. The 'other' may be anything external to the subject, and therefore it is a very broad and diverse concept that may range from family members and friends to a nation, humankind, the earth and a deity. Thirdly, active value is derived from the physical or mental manipulation of the object (e.g. actively constructing a Lego building); by contrast, reactive value entails a more distanced admiration or appreciation of it (e.g. appreciating Lego master works in an exhibition). Through combining the three dichotomies, Holbrook (1999) developed a typology of perceived value made up of eight types: *Efficiency, Excellence, Play, Aesthetics, Status, Esteem, Ethics, and Spirituality.*

There are three important facts regarding the typology that should be noted. Firstly, comprehensively understanding these interrelated types of perceived value is crucial for the generation of the right strategy. As Porter (1996, p. 64) points out, 'competitive strategy is about being different. It means deliberately choosing a different set of activities to deliver a unique mix of value'. Similarly, Holbrook (1999, p. 2), considers it as the basis of brand positioning, namely attaining 'a differential advantage for our brand by locating its perceived position closer to the ideal point of a target segment than the perceived locations of other available offerings'. The typology can therefore be used as a tool for research analysis and also for guiding the design of all communicative aspects of the marketing mix for a brand, namely the McCarthy's (1960) famous *'Four Ps' – product, price, place* and *promotion*. Secondly, the eight types of value may all be perceived in the evaluation of one object. However, an individual's perceived holistic value of an object involves subjective hierarchical preferences for the eight types of value, according to the individual's situation-specific comparisons of the object with another (Holbrook, 2006, p. 715). In other words, one normally assesses one type or several types of value to be more important than the others in a particular given context or situation. When the context changes, the value perception changes, but nevertheless, the less important types of value are not totally ignored. Accordingly, the only way to understand a given type of value is to compare it with other types and to examine the relationship between them (Holbrook, 1996). Thirdly, the 'active versus reactive' dimension is not necessarily taken into account in every study, since it greatly increases the complexity of the typology as an analytical framework. For example, in one of his own studies, Holbrook (2006) limits the complexity by combining only two dimensions of perceived value and therefore analyses four types of value: *Economic*, *Hedonic*, *Social*, and *Altruistic.* For this research, this simplified version is preferred, which can help to limit the level of abstraction in discussion and engender more concrete analysis for the purpose of strategic design. In order to better utilise the framework for the purpose of design research, I name these four types of value: *Utilitarian*, *Hedonic*, *Sociocultural* and *Altruistic Value*.

Firstly, a brand's offerings are perceived to have *utilitarian value* because they can be a means to achieving the customer's own objectives. Practicality, efficiency and convenience are common characteristics of products that are perceived to have high utilitarian value. For example, the Google search engine enables one to conveniently and cost-efficiently acquire information that is needed, so one perceives it to have great utilitarian value. Secondly, *hedonic value* occurs when the process of interacting with a given product or service itself is sensorily enjoyable and emotionally desirable. In this case, the experiential pleasure in the interactive process is appreciated for its own sake as an end in itself. For example, I perceive the process

of watching a Woody Allen film or playing Xbox games with friends as highly enjoyable and therefore of high hedonic value. Thirdly, when a brand and its offerings can serve as a means of shaping the responses of others, expressing cultural identity and enhancing the self-esteem of the owner, it would be perceived to have ***socio-cultural value.*** Symbolic meanings of brands often have great impact on this type of value. For example, many designers believe that Apple computer hardware better represents people working in the creative industries, whereas PC computers are often associated with those who work in business. Thus many designers prefer to use Apple hardware not only because it functions according to their needs, but also because it helps to manage the impression they give to other creative practitioners and clients. Finally, ***altruistic value*** matters when one's consumption of a brand's offerings 'affects others where this experience is viewed as a self-justifying end-in-itself — as when engaging in ethically desirable practices in which "virtue is its own reward"' (Holbrook, 2006, p. 716). For example, one might value and be willing to pay extra for products or services provided by brands that constantly try to improve the wellbeing of their employees in poor developing countries.

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5.4.2

Rubbish Theory

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The ***Rubbish Theory*** developed by Thompson (1979) provides a general framework for understanding how the meaning of objects changes over time. He claims that there are three cultural categories that one object may belong to, the first category being ***Transient***. Transient objects have steadily decreasing value and finite lifespans, such as ordinary tables, chairs or cups. These objects are usually created to fulfil specific consumer tasks or utilitarian needs and are rarely intended for a lifetime of use. The second category is ***Durable*** whereby objects have steadily increasing value and (ideally) infinite lifespans, such as the artworks of Leonardo da Vinci. They are often highly visible in human societies and can be considered a part of the wealth or heritage of the culture within which they are located. Given the countless examples of transient objects becoming durable objects, Thompson raised the question as to how such transfer actually happens.

Thompson (1979) argues that a direct transfer from transient to durable is impossible, but can be achieved through a third category, ***Rubbish***, which serves as the key bridge between the two. Rubbish objects are invisible and no longer used, loved or cared for. They might 'linger on the periphery of our lives, in the back of the drawer, bottom of the wardrobe or cupboard, corner of the garage or garden shed gathering dust', but they are also the 'objects which embody a significant amount of potential for re-emergence through processes of recycling, re-use and re-absorption into eve-
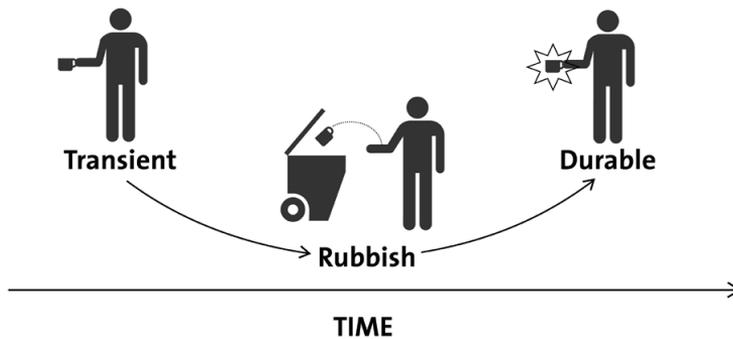
Figure 23. Cultural categories of objects and possible transfers between them
(adapted from Thompson, 1979, p. 10)

ryday lives' (Parsons, 2008, p. 391). Therefore, Rubbish is 'the zone of transformation where the unregarded detritus of commodities is turned into personal culture, and can rise again through the system into public culture and high market value' (Pearce, 1998, p. 93). In a more recent reflection on Rubbish Theory, Thompson (2003) himself describes the whole transfer process from Transient to Durable thus:

> *A Transient object, decreasing in value with time and use, eventually sinks into Rubbish—a timeless and valueless limbo. In an ideal world it would then disappear in a small cloud of dust but often this does not happen, and it lingers on, unnoticed and unloved, until perhaps one day it is discovered by some creative and upwardly mobile individual and successfully transferred to the Durable category.* (Thompson, 2003, p. 322)

Both phoenix brands and their obsolete first-life products generally can fit in the framework of Rubbish Theory. As discussed in Chapter 4, a phoenix brand in general has experienced four statuses or stages: ***Birth, Dominance, Dormancy*** and ***Rebirth***. In a similar way, its classic first-life products have also gone through these four stages: ***Original Design and Production***, ***Everyday Use***, ***Obsoleteness***, and ***Collectible.*** The Rubbish Theory's three cultural categories of objects – Transient, Rubbish and Durable – show clear connections with the four statuses of a phoenix brand and its classic first-life products.

The Rubbish Theory	The Phoenix Brand	The Classic First-life Products
Transient	Birth	Original Design and Production
	Dominance	Everyday Use
Rubbish	Dormancy	Obsoleteness
Durable	(Potential) Rebirth	Collectible

Table 3. A comparison between the three cultural categories of objects suggested by the Rubbish Theory, the fours statuses or stages of a phoenix brand and its classic first-life products

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5.4.3

A Memory Retrieval- Nostalgic Experience Model

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From a sociological perspective (macro level), the Rubbish Theory describes how the value and meaning of objects change over time, but it does not clearly state what factors may influence the transfer from Transient to Durable, leaving researchers with a gap to fill. Parsons (2008) analyses three sets of value creation practices (i.e. finding, displaying and re-using objects) that make the transfer from Rubbish to Durable possible. He argues that 'each of these sets of practices change the way people view an object moving it from being seen as a "rubbish object" of no value to a "durable object" of increasing value' (Parsons, 2008, p. 392). Likewise, I consider that some particular connections with memory and nostalgia may also support and better explain the Rubbish Theory from a psychological point of view (micro level). In Chapter 3, a 'Memory Retrieval - Nostalgic Experience Model' is introduced, based on the framework of product experience (Desmet & Hekkert, 2007). This model incorporates three levels of nostalgic experience that may be evoked by an interaction with artefacts (i.e. as an experience of meaning, an aesthetic experience, and an emotional experience) and highlights the relationship between nostalgic experience and memory retrieval.

In terms of products, brands and services, it is clear that not all may be granted equal opportunity to become durable objects after being rubbish. They need a particular potential, which can be something well hidden in people's minds and cultural memories. Notably, such predispositions can be outwardly expressed as 'Oh, I

used to have one of these when I was …', 'I remember …', 'Aren't they just beautiful…' and are often associated with the moment when a person is creating sociocultural and hedonic types of value for an obsolete object. Thus, nostalgic memory retrieval and nostalgic experience exert important influence on the people who may potentially influence the transfer from Rubbish to Durable. If memories and nostalgia are important in this context, perhaps the question of how such memories of rubbish are formed should be addressed. A more detailed discussion on this issue is in the concluding section of this chapter.

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5.5

Methods

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With the help of my Finnish colleague, the data regarding the history of Sarvis and its previously obsolete products becoming collectibles were gathered initially through magazines, newspapers and Internet searches in the Finnish language. It was found that many collectors often display their Sarvis collections, especially newly found items, on their blogs. Subsequently, through email contact, we were able to identify five collectors who were living in Finland and willing to participate in this study. Male collectors of plastic tableware were extremely rare. It was consistent with the findings of Csikszentmihalyi and Rochberg-Halton's study (1981) that tableware, to a great extent, is considered part of the 'toolkit' of housework and therefore potentially more favoured by women to preserve memories, than men, although changing social attitudes towards gender stereotypes during the period of Sarvis manufacture and the subsequent collecting period may well affect this.

All five collectors were female and were born in 1968, 1973, 1978, 1978 and 1982, respectively. They all grew up in Finland, were married and had at least one child. In order to directly compare the collectors and non-collectors and to explore how the nostalgic bond was formed, five Finnish females who share similar demographic profiles but did not consider plastic products could be collectibles were also invited to participate in the study.

Ten semi-structured in-depth interviews (five with the collectors and five with the non-collectors) were conducted from September to November 2011. Most of the interviews were conducted at the informants' home kitchens so that we could view their collections and kitchen environments directly and comprehensively. Two interviews took place in the office environment and one via telephone. Five interviews were in Finnish and five mainly in English, but Finnish was allowed at any point in these interviews since the Finnish colleague of mine was also present as the second interviewer.

Two sets of interview themes and questions were prepared for the collectors and

Collector Code	Year of Birth	Grew up in	Marital Status	Children
C1	1968	Hämeenlinna	Married	Yes
C2	1973	Etelä-Pohjanmaa	Married	Yes
C3	1978	Kouvola	Married	Yes
C4	1978	Helsinki	Married	Yes
C5	1982	Helsinki	Married	Yes

Table 4. The Sarvis collectors interviewed

Non-Collector Code	Year of Birth	Grew up in	Marital Status	Children
NC1	1968	Vantaa & Turku	Married	Yes
NC2	1968	Kontiolahti	Married	Yes
NC3	1973	Helsinki	Married	Yes
NC4	1976	Espoo	Married	Yes
NC5	1979	Espoo & Helsinki	Married	Yes

Table 5. The non-collectors interviewed

Figure 24. A collector presenting her Sarvis collection during the interview

non-collectors before the interviews. For the collector informants, the themes were related to their collecting hobby, their current practices related to it and the plastic tableware. They were, for example, asked about their background, how they started their collecting hobby, what makes an object important to them and what is their favourite object and why. The goal was to understand the motivation the collectors had for collecting plastic tableware, what they do with their collections and how they view the history of the collected objects. The non-collectors were asked to describe what kind of dishes they use and how they view plastic as a kitchen material. During the interviews, pictures of the most popular Sarvis tableware were shown to the participants, which greatly helped us to identify which items they remembered most clearly and emotionally, and also stimulated more engaging conversations. Anonymity was assured by informing the interviewees that their real names would not be published. As a reward for their contributions, each of the interviewees received two sets of newly launched plastic cups, which were provided free of charge by *Orthex*.

All the interviews were transcribed as the first step of analysis. The transcription process forced me to repeatedly listen to the interview conversations and helped me to become closer to the data. When making the transcriptions, intriguing points were marked simultaneously for later coding. After the transcription, the data went

through two coding phases: ***initial open coding*** and ***focused coding***. During the first phase, the interview transcripts were coded thoroughly in order to comprehensively draw out ideas and themes and to provide a clearer structure for the focused coding phase. The data was then re-examined in a much more focused way to identify possible answers to the original research questions, as well as to gain a deeper understanding of any closely related issues or thoughts that emerged from the initial coding.

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5.6

The Results of Analysis

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The analysis of data reinforced the proposition that the social and hedonic types of value attached to Sarvis plastic tableware were a result of the nostalgic bonding effect. The data reveal a great deal of information regarding 1) the practices through which these types of value were created, perceived and enhanced, and 2) what collectors experience during these practices and how nostalgic memories associated with the objects influence their collecting behaviours. Moreover, the comparison between the interview data collected from the collectors and those from the non-collectors also revealed significant differences and commonalities. Although the two groups of people all knew about Sarvis, and felt familiar with its products from their childhoods, they associated very different meanings and memories with the brand and its plastic tableware. Nevertheless, they shared very similar aesthetic preferences for tableware products.

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5.6.1

The Collectors

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The collectors were very keen to talk about the tableware that they collected and the collections appeared to play an important role in their lives. In the following paragraphs, the different dimensions of collecting behaviour and value creation are described.

'Hunting': A Casual, Lovely and Surprising Practice in Flea Markets

Collectors' shopping is a sort of 'treasure hunt, an adventure, a quest and a delight' (Belk, 1995, p. 72). To the collectors in this study, the flea market is the most frequently mentioned 'hunting ground', where their collecting behaviour often started and continued. They have acquired the habit of regularly frequenting different flea markets and second-hand shops in the hope of finding Sarvis plastic dishes that fascinate them. This 'hunting' process is casual, without much pressure.

> **C1:** *Usually it happens to me, I see something nice, it just comes into my head, I want to have those, and it was like that in a flea market.*

> **C3:** *This is so random, if I see something nice ... (I will just buy it).*

Searching for collectibles is as important as possessing them, sometimes even more so, especially at the moment when a desired item is discovered unexpectedly. For example, when asked what she would feel if she were to suddenly manage to find all the dishes she desires, one collector said:

> **C1:** *Sad! ... Because it's great when you go to a flea market, you never know what you are going to find. But if I had them all, there would be no more surprises ... It would be terrible to have them all, because the one great thing about collecting is looking for new ones, that's a part of it ... the process.*

Meanwhile, the experience of getting something for (almost) nothing during flea market hunting seems to be very satisfying.

> **C4:** *People don't value plastic much. People don't know the value of it. For example, this one (a Sarvis Katrilli cup). I found it in a box marked "take it if you want". No price (laughter)! That was nice, so I always want to find good price items.*

Showing: Photos on the Blogs

None of the collectors interviewed stated that they would intentionally show their collections frequently to others and they said that most of their friends and relatives do not usually care about their collections. But they did frequently take pictures of those cups, plates and containers they collected, posted them on their blogs and wrote often emotional words to express their nostalgic feelings for them. With the help of such online media, collectors find each other, share their memories associated with their collections and gather relevant information, such as which flea markets might be good places to find more collectible plastic tableware. It was also exactly the way we found these collectors for the interviews. Therefore, even though they did not express this point straightforwardly, it is reasonable to believe that by displaying their collections through their Internet blogs, they hoped to find and be connected with other collectors who had a common nostalgic bond with Sarvis. Display is thus a very important practice that reinforces the nostalgic bond. At the same time, it is also a crucial way to make this personally attached hedonic (or emo-

tional) value become more visible to a wider public and give the objects a greater likelihood to be rediscovered by the whole society as something that carries a specific cultural nostalgic memory. This is also how sociocultural value is created.

> **C4:** *… Then I started reading blogs, they (Sarvis tableware) are all over the place. People are going crazy about them and the prices (laughter).*

> **C3:** *After the first time I posted Sarvis on the blog … she (a blog follower) loves these Sarvis (products), and often if I put something new about these, she comments … I know she loves them and she's jealous (laughter).*

Using: Practical Collectibles

Belk (1995, p. 67) defines collecting as 'the process of actively, selectively and passionately acquiring and possessing things removed from ordinary use and perceived as part of a set of non-identical objects or experiences'. However, collecting in the current research context does not fully conform to Belk's definition. We found that all the collectors believed that their plastic items should be useable in their everyday lives and they therefore often use their collections for daily family dining or for special occasions (e.g. Christmas and Easter dinners). In this sense, it is perhaps more precise to call these Sarvis products semi-collectibles. On the other hand, using may also be considered an important practice of value creation.

> **C5:** *I try to collect the kind of things that we can use.*

> **C1:** *I like yellow ones, which are nice for example during Easter; and the red ones are for Christmas and our everyday use.*

Experience of Meaning:
Happy Childhood Memories and Local Culture and History

The collectors repeatedly mentioned positive childhood memories in the interviews, especially when they were asked about what this collecting hobby means to them, if they have any stories or dreams associated with their collections and why a certain item is their favourite. Family picnics and spending holiday time at the summer cottage are the most common themes the collectors associated with Sarvis. These memories or experiences are highly positive in terms of their affective tone.

C1: *Well, I have a couple of items from my childhood home, so I will always remember those being in everyday use. And there is one plastic tray … we had this plastic tray at home … I remember it was won by my father from a carnival game.*

C3: *We had similar plates when I was a child. We had them in our summer cottage and my grandfather's home … I remember it from my childhood, because it was used when we baked pancakes.*

C4: *I like the memories they give me – an instant childhood memory to me … Well, we used them a lot for picnics in the summer, because … my mother would let us eat outside in the yard, and we could take all of these, and they wouldn't get broken [laughter].*

C5: *I remember that when I was a child, with our family, we made many forest trips, and then we always had these kinds of red Katrilli cups with us. We used them to drink cocoa.*

One collector who lived in Pirkanmaa did not associate any specific positive childhood memories with Sarvis, but strongly connected her personal past with the history of the Sarvis brand. She told us:

C2: *Yes, I only collect Sarvis. I'm not enthusiastic towards any other … because I live here in Pirkanmaa and there used to be a Sarvis factory in the town. I am fascinated by the old history of Sarvis. I want to preserve those objects and collect them. In that way, perhaps, I feel that when I collect those dishes, I collect a piece of history of this area for us.*

Although these popular Sarvis dishes were designed by very famous Finnish designers, none of the collectors mentioned anything about the designers. It seems that the fame of Kaj Franck and Tauno Tarna is not a very important part of the experience of meaning for the collectors. Rather, it is the collectors' happy childhood memories and the local cultural meaning associated with Sarvis that made their collections valuable and meaningful to them.

Aesthetic Experience: Bright Colors and Simple Shapes

In addition to the associated meaning, the collectors also expressed a strong aesthetic preference for the appearance of Sarvis tableware, especially for the Katrilli series. The data show that the collectors particularly like these plastic dishes, not only because of the personal and cultural meaning they represent, but also because they match their tastes. This may be explained by the implicit memory that was formed through heavy exposure to the Sarvis design style during their critical developmental phases (childhood in this case).

> **C5:** *In my childhood, we had these Katrillis in use and also they give me that kind of positive feeling. These are somehow … They are my style.*

The various bright colours and simple shapes emerged as the most attractive features of Sarvis products, as evidenced by the two most influential series of Sarvis dishes: Katrilli and Pitopöytä.

> **C3:** *I like the colours. They are real colours, not some fading away colours. So, they are … I think the colours are the most important thing.*

> **C4:** *I like them because they have 'real' colours … I never buy transparent plastic cups, I love the colours … I like their simple look…*

5.6.2
The Collectors vs. The Non-collectors

Unlike the collectors, data gathered through interviews with ordinary Finnish consumers (i.e. non-collectors) show that they tend to care only about the functional factors and economic advantages of plastic tableware and consider plastic products cheap, informal but practical for specific occasions (e.g. forest trip). For them, this old Finnish plastic tableware did not carry much personal and cultural meaning. In other words, they perceived little sociocultural value, at least when they were being interviewed. When purchasing plastic tableware in the shop, they seldom checked which brand was marked on the products. When it came to the relative significance of different brands of plastic tableware, most of the ordinary consumers would clearly recall *Tupperware* and *Orthex* before we mentioned Sarvis. Though they all knew Sarvis from their childhoods, only two recalled Sarvis as a once famous Finnish brand without having seen the photos of Sarvis products.

NC2: *Of course, plastic tableware is nothing fancy ... Maybe it's more on the practical side ... I have no clue (how I knew the Sarvis brand), maybe I have known it from the childhood or something, but I don't remember. No particular personal stories.*

NC3: *When I went to buy the picnic set, I didn't check the brand ... it didn't really make any difference whether they were ... what brand it was.*

NC4: *We didn't use plastic tableware before we had kids. I have only bought some during the last years, as I have small children. With them, we first used plastic [tableware].*

Different Experiences of Meaning

All the collectors associate memories of family quality time in their childhood with their Sarvis collections and these experiences are seen as very positive, memorable and nostalgic. By contrast, non-collectors associate some minor negative experiences with plastic tableware, especially with the plastic material. They had a kind of collective mind-set that plastic dishes are only for children and not good enough to serve food to adults on family occasions; they felt that these dishes are suitable for use only at school or scout camp because they are light, unbreakable and cheap, thanks to which children can use them carelessly.

NC1: *If someone set the table with plastic, I would think, do you feel lazy or something?*

NC5: *Maybe they remind me a little bit of negative kindergarten experiences, somehow ... children's dishes that never break ...*

Similar Visual Aesthetic Preference

All of the ordinary consumers participating in this study use porcelain and glass tableware in their everyday lives. Though they never thought plastic tableware could be collectible, most of them consider that some porcelain dishes produced by *Arabia* (an old and famous Finnish porcelain tableware brand) could be collectibles. Compared to Sarvis and plastic material, Arabia's porcelain dishes have much higher material value and a much longer tradition in Finnish culture. In addition, brands like Arabia and Iittala (which are now both owned by Fiskars Group) have

long formed close partnerships with the most famous Finnish designers (e.g. Alvar Aalto, Kaj Franck, Tapio Wirkkala and Birger Kaipiainen) and have always been sold at comparatively high prices. To some extent, their porcelain products may be viewed as something born to be timeless or Durable, and this is exactly what Arabia and Iittala have been claiming – 'Timeless design since 1881'.

Four non-collector interviewees frequently mentioned Arabia's *Teema* series as one of their favourite collectible porcelain tableware series. As one of the most prestigious Finnish designs, Teema is generally believed to be the bestselling Arabia (now branded as Iittala) series of all time. Interestingly, the designer of the Teema series, Kaj Franck, also designed the Pitopöytä series for Sarvis, and his student Tauno Tarna designed the most collectible Sarvis series – Katrilli. A high degree of visual similarity can be found between Katrilli and Teema: simple shapes and varied colours. Both embodied the design philosophy of Kaj Franck: very basic geometric forms can perfectly integrate with each other, enabling designers to make a simple, beautiful, functional and flexible system, where the only decoration needed, according to Kaj Franck himself, is colour.

No matter how the Sarvis brand is remembered, when the pictures of Sarvis tableware were shown, all the collector and non-collector informants could recognise them as Sarvis products and expressed strong affection for their design styles. Perhaps this plastic tableware collecting phenomenon has not yet become strong enough to affect all the potential collectors. We found that two ordinary consumers' interest in Sarvis grew significantly as the interviews progressed, especially after they saw the pictures. At the end of the interviews, they stated that Sarvis is desirable and should be seen as an important part of Finnish culture and design heritage.

> **NC 3:** *Yes, I remember these plastic things from my childhood … Sarvis is very Finnish, cheering, colourful, retro, nostalgic, beautiful and maybe practical also … But Orthex is just practical, not expensive, not beautiful … Now I see why they are collecting Sarvis. I see the value too.*

> **NC4:** *After I really stare at these for a long time, yes, I believe these are treasures and certainly desirable.*

Discussion

The results reveal that the Sarvis collectors' nostalgic memories forged during critical personal development periods and their nostalgic experiences evoked during the recent rediscovery and interactions with Sarvis first-life products had a key influence on the change in the perceived value of the Sarvis brand from Rubbish to Durable. The sociocultural and hedonic value attached to such rediscovered objects can be to a great extent seen as a result of the nostalgic bonding effect.

5.7.1

Memory Formation

Given that memory is so important in this case, I have divided the complete meaning and value changing process that the Rubbish Theory describes into three phases (i.e. **memory formation**, **provisional oblivion** and **memory retrieval**) to explain it in detail. Through reviewing this process, I am able to achieve the research objectives that I presented at the beginning of this chapter.

If viewed from a human's perspective, the process of an object's (i.e. Sarvis and its products in the current case) transfer from Transient to Rubbish (i.e. ordinary use and devaluation process) is equivalent to a memory formation process, during which users form their memories of the object, including both explicit and implicit memories. When the memory formation process ends, it undergoes a permanent or provisional oblivion phase. The object becomes Rubbish and ceases to be visible in the users' lives, but the memories of the object and the experiences or stories associated with it stay hidden in the users' minds. The object may subsequently disappear forever or be rediscovered later as a Durable object in the marketplace or their own closets. In the current case study, it has been shown clearly that there are two characteristics shared by all the collectors who formed a nostalgic bond with Sarvis: they associate positive childhood experiences with Sarvis plastic tableware (explicit memory formation) and had heavy exposure to the products during their childhood (implicit memory formation), which may have impacted on their aesthetic taste. This finding may be generalised as: **1) the positive experiences associated with an object** and **2) a heavy exposure to the object during a critical period (e.g. childhood)** would positively influence the person to form and attach a nostalgic bond to the object, then emotionally and culturally evaluate the object as a Durable item, after it has been Rubbish for a period.

Meanwhile, if we look at the memory formation process from the object's (i.e. the brand and its first-life products) perspective, three attributes may have an impor-
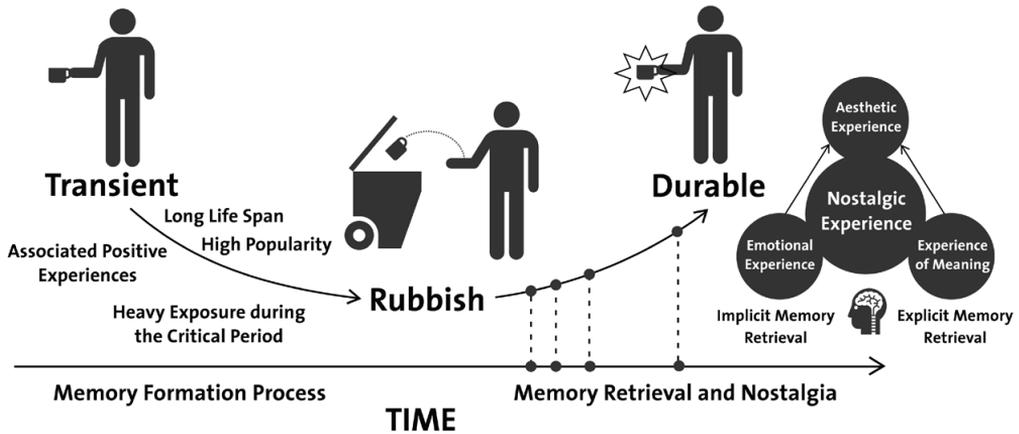
Figure 25. The formative process of nostalgic bond

tant influence: **3) *the lifespan*** and **4) *the popularity*** of its first life. Being the first is crucial in order to form effectual nostalgic memories with its users; a product (or a product series) needs to be able to function long enough before going into the Rubbish category. In terms of a brand, longevity is also a precondition for the formation of brand memory and the construction of brand heritage. Secondly, if an object was once very popular in a society, it will often have greater potential to be ascribed sociocultural meaning and value, and rediscovered by wider society as part of their future collective heritage. For example, Sarvis and its plastic tableware possess both of these characteristics. The brand had a long history and its products were perceived as high quality and were desired over a lengthy period. In addition, Sarvis plastic tableware was very much liked by Finns and was ubiquitous in Finland before the 1980s.

Thus, from both viewpoints of humans and objects, four characteristics of the (potential) phoenix brand are initially identified: 1) associated positive experiences or memories, 2) heavy exposure during the critical period, 3) relatively long lifespan, and 4) great popularity. The following chapter further validates and extends the features through examining the three phoenix brand cases.

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5.7.2

Memory Retrieval and Nostalgia

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In the third phase of the value changing process, the nostalgic bond is eventually formed and perceived through memory retrieval and nostalgic experience. In their research into the role of nostalgia in consumption experience, Holbrook and Schin-

dler (2003, p. 121) also conclude that 1) 'nostalgic bonding occurs ubiquitously and takes a variety of forms', meaning one's nostalgic bond may be formed with almost any object with little influence of its material value and 2) the shared basic mechanism of nostalgic bonding is that 'some object evokes, symbolises, instantiates or otherwise captures some sort of lost but still-valued experiences — namely, those associated with a set of pleasurable or at least personally significant memories from the past'. It often starts with an unexpected encounter with the object and carries on as value creation practices such as hunting, displaying, using and discussion. In this process, the person who rediscovers the object can continuously experience nostalgia and derive positive emotions from this. The nostalgic bond between the person and the object would be enhanced simultaneously. As previously stated, explicit memory retrieval would determine the meaning level of nostalgic experience – which personal and cultural meanings and what experiences would be associated with the object. In addition, implicit memory retrieval has a crucial impact on nostalgic preference – a lifelong aesthetic preference or taste for the style or specific appearance features of the object.

Also worth noting is that rediscovered brands and products are not always associated with particular events that are nostalgically recalled, but also have the capacity to reconnect to many more seemingly forgotten nostalgic moments that have no clear connections with them. During the interviews, it was common that the conversations started with nostalgic stories related to Sarvis, and then diverged and broadened to cover generally happy childhood stories that were not directly related to Sarvis. Some even felt surprised they still remembered such moments. Belk (1990, pp. 670-671) also describes a similar result of his observations, claiming that 'past times that are nostalgically recalled are sacred times. Especially when they are involuntarily remembered, these times are mysterious, powerful (kratophanous), unexpected (hierophanous), mythical, and prompt feelings of ecstasy or flow … With sacred nostalgic memories evoked by sacred possessions, it is not so much that these objects "stand for" particular events evoked in documentary fashion, as that they are the stimuli for an evolving network of vivid memories; that is, they "lead to" other memories in an interwoven net that grows rich in associations, moods, and thoughts'.

5.7.3

The Change in the Hierarchical Structure of Perceived Value

Utilising the typology of perceived value as an analytical tool, I can now describe the underlying change in the value of Sarvis' brand and its classic products, particularly in terms of the hierarchical structure. In the beginning, the utilitarian value of the newly born Sarvis brand and its offerings was perceived by customers to be the leading type of value. Great functions, performance or being able to provide new convenience and efficiency were the most common reasons for the growth of its popularity and becoming a dominant brand. Besides, its innovative brand image and new design style developed in the 1960s and 1970s effectively differentiated Sarvis from its competitors at the time, which also increased its hedonic value simultaneously.

Decades after the brand's dominance, the 1973 oil crisis doomed the whole traditional plastic industry, and significant changes in lifestyle and material preferences occurred among the Finnish public. Meanwhile, a couple of competitive brands revolutionised the industry by providing the market with new products built on new technology and offering more cost-effective options. Facing the severe challenges, Sarvis struggled for a period of years but eventually failed. At this point, all its types of value dramatically decreased and the brand eventually became dormant.

Thanks to its longevity and popularity in its first life, the Sarvis brand had been woven into Finnish people's cultural memory. For many, moreover, the brand and it's classic products symbolised their happy childhood in a bygone era. Its signature style – along with many other classic designs launched in the same era – cultivated a large number of people's aesthetic preference for tableware products. As a result, decades later, the Sarvis brand was rediscovered by some collectors. Its obsolete products were increasingly perceived to be a hedonic and symbolic resource for aesthetic pleasure and identity construction and expression, rather than a utilitarian resource for efficiency. The increase in hedonic and sociocultural types of value of this brand made its return as a phoenix brand possible.

5.8
Conclusion

By examining a specific Finnish example of potential phoenix brands, this chapter has 1) initially explored the possible common characteristics of the (potential) phoenix brands, 2) mapped out the formative process of the nostalgic bond, and 3) revealed the change in the perceived value of phoenix brands in terms of both volume and hierarchical structure.

Although dormant brands and their first-life products are not valueless, not all dormant brands have equal potential to become phoenix brands. The results of the case study have shed some light on the RQ 1 of Part II – What characteristics of a dormant brand may indicate that it possesses significant potential to be revitalised through nostalgia-driven design. It may be examined from two perspectives. Firstly, from the dormant brand's perspective, if it 1) had a relatively long lifespan in terms of its brand history and obsolete first-life products (which may have become collectibles), and 2) enjoyed great popularity or dominance in its first life, then this dormant brand would have a high chance to be rediscovered and revived. Secondly, from a customer perspective, if 3) a high proportion of one or more generations were heavily and collectively exposed to the brand and its first-life products during their, for example, childhood, adolescence and young adulthood, and 4) they associate positive experi-

The Rubbish Theory	The Phoenix Brand	The Classic First-life Products	Nostalgic Bond	Primarily Concerned Types of Value
Transient	Birth	Original Design & Production	Memory Formation	Utilitarian
	Dominance	Everyday Use		
Rubbish	Dormancy	Obsoleteness	Provisional Oblivion	Seemingly Valueless
Durable	(Potential) Rebirth	Collectible	Memory Retrieval	Hedonic & Sociocultural

Table 6. Two more parallel comparative layers (i.e. Nostalgic Bond and Primarily Concerned Types of Value) are added to the Table 3 on page 169

ences or memories with the brand and its products, this dormant brand would have a greater potential to be rediscovered and ascribed greater non-utilitarian (i.e. sociocultural, hedonic and altruistic) value some years after it became dormant. As this initial answer to RQ1 is drawn from a single case study, it requires more case studies to validate. Therefore, one of the purposes of the following two chapters, in which a multiple-case study is reported, is to further validate this finding.

Relying on the theoretical framework that combines Holbrook's Typology of Perceived Value (1996), Rubbish Theory (Thompson, 1979), and the Memory Retrieval – Nostalgic Experience Model introduced in Chapter 3, the results of this case study have allowed me to clearly describe the formative process of the nostalgic bond and the value changing process of a phoenix brand from the perspectives of both human and object. As discussed in the early part of this chapter, the Rubbish Theory provides a general framework of the process (i.e. Transient-Rubbish-Durable) for examining the value change of an object. By situating this framework in the context of current research, it shows a clear connection with the lifecycles of a phoenix brand (i.e. Birth-Dominance-Dormancy-Rebirth) and its first-life products (i.e. Original Design and Production-Everyday Use-Obsoleteness-Collectible). Furthermore, when applying this framework to examining the formation of a nostalgic bond and the change in the most concerned types of value, two more parallel layers which view the same process from a human's perspective can be added to this dynamic and interrelated framework. Specifically, there are three general phases of the formation of a nostalgic bond in relation to the lifecycles of the phoenix brand and its first-life products: Memory Formation, Provisional Oblivion and Memory Retrieval. In addition, when in the Transient period, utilitarian value typically appears to be the primary value that people want out of a brand and its products. When such a product then falls into the Rubbish category, it becomes seemingly valueless. When the brand and its first-life products are rediscovered as Durable objects, they are valued again, at least by some. But then the most concerned types of value are usually non-utilitarian (i.e. hedonic and sociocultural value).

The following Chapter 6 and Chapter 7 will continue the study on the phoenix brand phenomenon through a multiple-case study. Because the multiple-case study was designed to validate the initial findings of RQ1 presented in this chapter, and more importantly, to answer RQ3 – *In the real-life context, how has cultural nostalgia-driven design, as a dormant brand revitalising strategy, been successfully deployed*? – it was based on three successfully revitalised phoenix brands from three different cultures: Forever-C (China), Jopo (Finland) and TDK Life on Record (Japan and the US with a global scope of influence). These brands will be presented individually following a case-oriented strategy in Chapter 6, and then analysed and compared following a variable-oriented strategy in Chapter 7.

Chapter 6

Rebirth through Nostalgia-driven Design:
Case-oriented Analyses

6.1

Introduction

Chapter 6 (applying a case-oriented strategy) and Chapter 7 (applying a variable-oriented strategy) together present a retrospective multiple-case study. It is intended 1) to verify and extend the initial findings regarding the common characteristics of potential phoenix brands, and 2) to discover the key drivers in revitalising phoenix brands through nostalgia-driven design. Thus, the RQ 1 and RQ 3 of Part II are addressed in these two chapters.

> *RQ 1: What characteristics of a dormant brand may indicate that it possesses significant potential to be revitalised through nostalgia-driven design?*
>
> *RQ 3: In the real-life context, how has cultural nostalgia-driven design, as a dormant brand revitalising strategy, been successfully deployed?*

In the multiple-case study, three cases of successfully revitalised phoenix brands from three different cultures, Forever-C (China), Jopo (Finland), TDK Life on Record (Japan and the US with a global scope of influence), are presented, analysed and compared. The foci or units of analysis in this study are ***the phoenix brands*** (e.g. the historical and cultural contexts of their rise and fall, their original classic products and revitalising products), ***the revitalising design projects*** (e.g. the initiations, the special considerations in the design processes) and ***the designers or design decision makers*** who initiated and conducted the brand revitalisations (e.g. their experiences, opinions and reflections).

The current chapter uses a case-oriented strategy to narrate the three cases in detail, and to develop the analysis in a relatively individual manner. Firstly, **Section 6.2** elaborates the specific data collection methods and two analysis strategies used in the multiple-case study. **Sections 6.3**, **6.4** and **6.5** provide detailed narratives of the three cases involved in the current study. Because the three cases took place in three

different cultures and only one of them (i.e. TDK) has a global scope of influence, it is necessary to describe the case narratives in detail to enable international readers to fully understand the unique historical and cultural background of each case. It is also an effective way to present the wide range of data collected for the study in a systematic, holistic and explicit manner. Each case narrative is generally written in chronological order, from the birth of the brand to its dominance and then dormancy, from seeking brand rebirth through design, to the actual design process and eventual success. Simultaneously with the case narratives, the case-oriented analysis is initially developed, which also enables the variable-oriented analysis in the next chapter.

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6.2

Methods

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Each of the cases in the multiple-case study was firstly treated as a single and concentrated inquiry and studied in its entirety, though they are intended to answer the same research questions using the same research methods. In general, the data were collected through three sources: *1) online and offline documents, 2) artefacts, and 3) in-depth interviews with the principal designers or design decision makers of these projects.* Among these sources, the in-depth interviews were the most important. Data collection and analysis occurred simultaneously from the beginning to the end of the research process, in a continuous and iterative manner. Following the guidance of Miles and Huberman (1994), the data analysis was informed by three flows of activities: *data reduction, data display, and conclusion drawing/verification*. Firstly, data reduction is a continuous 'process of selecting, focusing, simplifying, abstracting and transforming' the collected data (ibid., p. 10). Secondly, a data display means 'an organised, compressed assembly of information that permits conclusion drawing and action (ibid., p. 11). The forms of data display may include tables, narratives, graphs and matrices. Finally, conclusion drawing/verification involves making sense from data and establishing a logical chain of evidence. This flow of activity does not only occur in the final phase of the qualitative research, but rather throughout the whole research process, as Miles and Huberman (ibid., p. 11) describe: 'From the start of data collection, the qualitative analyst is beginning to decide what things mean – is noting regularities, patterns, explanations, possible configurations, causal flows, and propositions. The competent researcher holds these conclusions lightly, maintaining openness and scepticism, but the conclusions are still there, inchoate and vague at first, then increasingly explicit and grounded'.

Since all three of the selected cases (i.e. Forever, Jopo, TDK) had attracted great attention from ordinary consumers as well as design professionals and journalists,

large numbers of documents were available from the beginning of the study. Thus, the initial set of data was collected through a search of relevant documents online (e.g. company websites, design consultancy websites, articles, news and designer interviews on design-oriented websites, relevant comments and nostalgic stories shared by ordinary people) and offline (e.g. newspapers, magazines and brand history books). The data collected from these documents included ***textual information*** and ***images***. Textual information was mainly about the history or lifecycle of each brand, the cultural nostalgic memories people associated with these brands and the designers' (or design decision makers') reflections on their nostalgia-driven design initiatives. The images were mainly photographs of the obsolete first-life products and the new products that revitalised the phoenix brands.

The analysis of the textual and image data served many functions. Firstly, it helped me to further familiarise myself with the background of each case in detail, and allowed me to map out the history and lifecycle of each brand. Secondly, it identified the most appropriated interviewees for the following interviews. Thirdly, the image data was analysed to find out the similarities and differences between the original and new products. It was determined which design elements were retained and which were altered. These findings were verified through the following interviews.

I then contacted the identified informants for face-to-face interviews through my personal contacts in the design community or directly by sending interview requests through *LinkedIn* message. As evidenced by the available information on the Internet (e.g. news articles, company websites), all the informants were the key design decision makers in these selected cases. The interviews were arranged according to their schedules and the main interview questions and structure were sent to them before the interviews in preparation. In order to collect as much data as possible, their working environments were suggested as the preferred interview venues. Because all the design cases had been heavily exposed to the public, all the informants considered that anonymity was unnecessary.

Wang Zhuo (the industrial designer and co-initiator of the Forever-C project) participated in a four-hour, face-to-face meeting at a local teahouse in Hangzhou, China on 12 Dec 2011. This interview was conducted in Chinese, the mother tongue of both Wang and me.

Paul O'Connor (the Creative Director at Ziba and the design team leader of the TDK Life on Record project) participated in a three-hour, face-to-face interview at Ziba Headquarter in Portland, Oregon on 12 Nov 2012. English was the language used in this interview.

Markku Autero (the Product Development Manager at Helkama Velox and the Designer of the second generation Jopo) and *Jari Elamo* (the Managing Director at Helkama Velox) were interviewed for over one hour each at a small meeting room at the Helkama Velox headquarters in Hanko, Finland on 8 Nov 2013. These two interviews were mainly in English, since both Autero and Elamo are Finnish natives who speak fluent English. Nevertheless, a Finnish colleague of mine (Dr Sari Kujala) joined both interviews as the second interviewer to provide language assistance if necessary.

The informants were asked to first introduce themselves, give their approximate ages, where they grew up, how long they had been working as designers and whether they had any nostalgic memories of the brands before the design project began. Then, the questions centred on how and why they came to initiate these design projects, how the design process proceeded, what are the most important and special aspects in their nostalgia-driven design processes compared with the other design projects, and finally their crucial considerations and suggestions for revitalising dormant brands through design.

During the interviews, comparison images of the obsolete original or first-life products and their new designs were used as conversation triggers. The presence of these images greatly encouraged the designers to provide detailed information about their design decisions, not only by verbal means but also by drawing. I also requested to have access to (and take photos of, if allowed) the relevant visual documents (e.g. sketches) and artefacts (e.g. early prototypes) generated during the design processes.

Because Jopo had been a successfully revitalised phoenix brand for over ten years, I decided to also look at the fans in order to gain an understanding of why Jopo also appeals to the younger Finnish generations and foreigners who obviously do not share the same cultural nostalgia as older Finnish people. With the help of Elamo, Kujala and I recruited ten Jopo fans through Jopo's Facebook page and interviewed them individually. Among these informants, four were foreigners and six were Finnish. More specifically, the foreigners were non-Finns who lived in Finland but grew up in other cultures and had never heard of Jopo before coming to Finland. Three of the six Finnish informants grew up in Finland and personally used the original Jopo during their childhood or adolescence. The other three younger Finnish informants had no direct memories of Jopo's earlier prevalence, but only became fans after Jopo's rebirth in the 21st century. Nevertheless, since users or customers are not the primary units of analysis in this multiple-case study, I only intend to use these data as an additional source to glance at the Jopo fans' experiences, which may help validate the results drawn from the data collected with the designers and companies.

A reflection on the actual steps of this multiple-case study tells me that the research

	Year of Birth	Gender	Nationality	Grew up in	Jopo Model(s) Original / 2nd G
Fan 1	1984	Female	Iceland	Iceland	Original
Fan 2	1986	Female	China	China	2nd Gen
Fan 3	1985	Female	France	France	Original
Fan 4	1989	Female	The Netherlands	The Netherlands	2nd Gen
Fan 5	1962	Female	Finland & Sweden	Finland	Both
Fan 6	1968	Male	Finland	Finland	Both
Fan 7	1971	Female	Finland	Finland	2nd Gen
Fan 8	1983	Female	Finland	Finland	Both
Fan 9	1991	Female	Finland	Finland	2nd Gen
Fan 10	1996	Male	Finland	Finland	Both

Table 7. Jopo fans who participated the interviews

process was nonlinear, meaning that searching for new complementary theories and analytical frameworks, data collection and data analysis were intertwined with each other and continued until the very end of this doctoral research. Nevertheless, after I completed the interviews for each case study, the data analysis became more formal, systematic, and also the most time-consuming research activity.

First of all, the audio recordings of the interviews were listened to repeatedly and transcriptions prepared. Subsequently the transcriptions went through two coding phases – ***initial open coding*** and ***focused coding.*** These were the same interview data analysis techniques that I used in the single case study. Because one of the research foci of the multiple-case study was the design process itself, the analysis of interview data heavily involved further analysis of the data collected from the documents and artefacts, verifying the initial findings, and making connections between different forms of data. It was a highly immersive process during which anticipated

issues, concepts and themes quickly emerged; additionally, some unanticipated and even baffling questions were also identified.

The writing of case narratives was also an integrated step of data analysis. Being written chronologically or thematically (sometimes in combination), a case narrative allows the reader to access 'all the information necessary to understand the case in all its uniqueness' (Patton, 2002, p. 450). As both data reduction and display, the case narrative writing had started before the conclusions were drawn. During the process, interview data were further combined with those collected from documents and artefacts, and the connections between various evidence sources became clearer and stronger. It not only transformed all kinds of fragmented data into readable and holistic narratives with detailed information about temporal, spatial and cultural context, but also greatly facilitated the following cross-case comparison.

Comparison is broadly viewed as 'the dominant principle' (Boeije, 2002, p. 391) or 'the main intellectual tool' (Tesch, 1990, p. 96) of qualitative data analysis. In a multiple-case study, the core activity of comparison is to look for differences and commonalities among different but similar cases. 'Different cases often emphasise complementary aspects of a phenomenon. By piecing together the individual patterns, the researcher can draw a more complete theoretical picture' (Eisenhardt, 1991). In addition, it is also seen as an important way to assure the validity of the new knowledge (Boeije, 2002). In terms of how to conduct comparative analysis, Miles and Huberman (1994) identify two common strategies: ***case-oriented*** and ***variable-oriented***. Case-oriented analysis is based on the researcher's deep understanding of each individual case within its particular context. It usually starts by studying one typical case deeply and holistically. Then, the successive cases are studied one by one in a similar way to discover emerging patterns among them. By contrast, variable-oriented strategy normally starts with the researcher's well-constructed theoretical understanding of a given phenomenon. When conducting variable-oriented cross-case analysis, 'cases are not examined as entire entities. The focus is on hypothesis testing and subsequent confirmation or rejection of general theories' (Bradshaw & Wallace, 1991, p. 57). For the current research, I approach the cross-case analysis through both case-oriented and variable-oriented strategies. The rest of the sections of the current chapter are mainly used to develop the narrative and analysis of each case, from which significant variables and patterns gradually emerge. The next chapter will deploy a variable-oriented strategy to enable the cross-case analysis of the three cases.

Case 1:
Forever-C (China)

In order to comprehensively explain what *Forever (永久)* as a bicycle brand means to the Chinese and why they have a strong nostalgic bond with this brand, the story of the Forever bicycle has to be placed in the broader context of China's economic transition and related nostalgia wave.

6.3.1

From Dominant to Dormant

China used to be called the 'kingdom of bicycles'. Before the mid-1990s, cycling was the most common way to move about in cities, and bicycles were the only type of vehicle that ordinary Chinese could afford to possess. The 'kingdom' had three national bicycle brands – *Forever*, *Phoenix* and *Flying Pigeon* – among which Forever was the most famous, memorable and iconic.

The origins of Forever can be traced back to the Second World War, when in 1940, a Japanese businessman established his bicycle factory in Shanghai. It was this factory that produced the first incarnation of Forever. After the Second World

Figure 26. George Bush, his wife Barbara Bush with their Forever bicycles in Tiananmen Square in Beijing, 1974. In 1974 -1975, Bush was posted to Beijing as US envoy (BBC, 2009).

War and the Chinese Civil War, the factory was taken over by the newly established socialist government of China. Along with the formation of the planned economy, in 1953, it was transformed into a state-owned enterprise and started using 'Forever' to brand its products.

Forever was quickly developed to become perhaps the most important bicycle manufacturer in the planned economy system and its name quickly became an icon that represented the best bicycles at the time. As introduced in Chapter 2, apart from the high product quality, which allowed the bicycles to be handed down from one generation to another, the characteristics of the planned economy significantly determined the success of Forever as well as that of many other Chinese domestic brands. During the closed planned economy period, Forever had few competitors and the demand for its bicycles always exceeded supply. Besides, it was not simply an issue of money. Because of the product rationing system, a consumer needed sufficient funds as well as a special coupon to obtain a Forever bicycle. As a result, Forever became a dominant bicycle brand and a brand name synonymous with bicycles in China. Furthermore, the Forever bicycle models in the planned economy period only ever incorporated subtle, incremental and occasional design changes, so that contemporary consumers still have a very clear and broadly shared archetypical view of what a classic Forever bicycle should look like.

After the *Reform and Opening* period commenced in 1978, there was a gradual loosening of the rationing system and steady increase in income, so that by the 1980s, the Forever bicycle retained its fashionable status and became one of the four most desired possessions of Chinese households at the time. These four products in that specific historical period were also known as the 'Four Big Items (四大件)', which included the *Forever* bicycle, *Butterfly* sewing machine, *Shanghai* watch and *Red Light* radio set. In the 1980s, these objects were expensive and usually bought by newly married couples with the help of their parents. Coupons were still needed but relatively easier to obtain.

However, the situation changed rapidly in the 1990s. Because of the country's resolute transition to a market economy, Forever was reorganised for listing on the newly established Shanghai Stock Exchange in 1993. At the same time, many internationally famous brands flooded into the Chinese market and introduced their products, predominantly at the high end of the market. Consumers finally had an opportunity to familiarise themselves with successful global brands and products from capitalist markets. The varied, novel and more user-oriented design of the incoming products soon attracted large numbers of consumers and encouraged them to pay double, triple or even higher prices, instead of continuing to buy their home-grown products. The tremendous change from a seller's market to a buyer's market provided Chinese consumers with abundant consumption choices and

in the meantime rendered a fatal blow to almost all the traditional native brands that had succeeded in the planned economy period, including Forever. After being promoted by the government to become the most popular bicycle for decades, Forever lost its capacity to compete with its international competitors. Consequently, in the mid-1990s, Forever started to be regarded as an unfashionable and low-end brand. Forever ran a serious deficit for several years and on 14 May 2001 the Shanghai Stock Exchange had to suspend the company from trading (Shanghai Forever, stock code: 600818). In the same year, the *Shanghai Zhonglu Group* (上海中路集团), a private enterprise, acquired Forever (Shanghai Zhonglu Group, 2010). Struggling for two decades, Forever became increasingly invisible in the consumer market, but luckily managed to survive, mainly by manufacturing original bicycle components for other bicycle brands and selling cheap products to the low-end market.

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6.3.2

The Initiation of the Forever-C Project

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Forever had never been a company that recognised the real importance of innovation, branding and how to use design to win against fierce market competition. But when international bicycle manufacturers imported thousands of different products with the latest functions and designs, Forever realised that it was time for a change. However, according to their product gallery, Forever's general coping strategy was simply to identify which models produced by their international competitors were the most commercially successful and then adopt their styles and produce cheaper versions for Chinese consumers. Important issues such as coherent product identity and brand culture were totally ignored. However, things started to change in 2008, when Chen Shan became the CEO of Shanghai Forever Cooperate. At the time, Chen Shan was only twenty-one years old, and his father, Chen Rong, was the Board Chairman of Shanghai Zhonglu Group. It was this young CEO who began the company's search for high-quality design and innovation.

In 2009, Forever and Tongji University in Shanghai established a collaborative relationship and held a joint design workshop, during which design students from China, Denmark and Germany created many futuristic-looking conceptual bicycles for the company (e.g. Figure 27). This workshop attracted the attention of Gao Shusan (at that time, a Master's student in architecture at Tongji University) and his friend Wang Zhuo (an industrial designer who studied in both China and France). They were glad to see that Forever, a brand that Chinese people have strong emotional links with, had finally realised the importance of original design. But, according to Wang, at the same time, they also found that none of the conceptual design

Figure 27. A new bicycle model designed by Danish designers for Forever.
(A duplicated photo from a poster card the author came across at Kolding School of Design in Denmark)

outcomes created during the workshop were able to convey an appropriate under-
standing of what Forever really represents in terms of people's memories. Although
the design outcomes, as individual products, were all brilliant in terms of inno-
vation in style and function, the unique brand heritage of Forever was effectively
lost in these radical designs. Therefore they initiated a design project entitled For-
ever-C. This plan also attracted several young Chinese industrial designers, fashion
designers, graphic designers and marketers to join in, and together they formed a
design team called *Crossing*. The team proposed that Forever-C should become a
new product series of Forever bicycles. Wang stated that the fundamental idea of
Forever-C is 'to revive the colourful city cycling culture of China by revitalising the
most memorable Chinese classic bicycle brand – Forever'. 'C' represented six Eng-
lish words: 'China', 'Classic', 'Cycle', 'City', 'Colourful', and 'Culture'.

  Although the Forever company was quickly persuaded by the Crossing team that
the design project would be worth trying, they were initially too cautious to fully
commit. Fortunately, as Wang told me in the interview, the Crossing's main motive
for this project was not seeking financial gain but instead looking for a chance to
design for a brand that they all had a strong nostalgic bond with, and also to advo-
cate to younger urban residents the advantages of a more sustainable cycling life-
style. Eventually, the company decided to attempt the project and endorsed a pre-
liminary agreement, according to which Crossing would conduct the design project

without requiring any payment, but Forever would provide all the necessary materials and prototype support for the project. If the new design outcomes successfully attracted significant orders from distributors, Forever would launch Forever-C and Crossing would be paid in profit-related commissions or bonuses. Thus, the Forever-C project officially started in February 2010.

6.3.3

Inspired and Encouraged by the Cultural Nostalgic Memory

The Chinese population shares many positive or idealised nostalgic memories related to Forever bicycles. From a collective perspective, these memories represent a unique cultural nostalgic memory associated with the Forever bicycle. According to Wang's reflection on the design process, the cultural nostalgic memory was immediately recognised at the very beginning of the project as the most significant driver that would ensure the success of Forever-C. When I asked Wang what brought the team together in the first place to design for Forever with the risk of no reward at all, she told me that:

> **Wang:** *We* [members of Crossing] *all have memories of the Forever bicycles. All but two of us were born in 1984. One was born in 1981 and the other was born in 1990. We share many quite similar memories of the Forever bicycle, and the most amazing thing we found was that our memories are not exclusively personal but actually broadly shared among ordinary Chinese, especially among the post-80s generation.*

> *The memories of Forever are also closely associated with family, because fifteen to twenty-five years ago, Forever was not just a mode of transport but also an important or luxury possession in ordinary families.*

Wang Zhuo then described to me one of the most typical nostalgic memories related to Forever bicycle thus:

> **Wang:** *I guess you also had this experience. Your father had a Forever bicycle when you were in kindergarten or primary school, and he used that bicycle to take you to and pick you up from the school. You always sat on the top tube. In the winter, it was cold and windy*

and your father used his big heavy coat to cover you and make you warm. And also, sometimes your hands might be hurt by the unfriendly rod brakes [laughter].

It might sound implausible, but as a member of the post-80s generation myself, I had exactly the same experience when I was a child. Nostalgia evoked by such a memory is full of positive feelings, even when you recount the painful details of how you hurt your hands on the old style brakes; this evokes lengthy laughter, as the pain is long gone and only happiness remains. The Forever brand and its classic 28-inch and 26-inch wheel models carried at least two generations of family memories that are infused with a positive tone and are widely shared by people across the country.

6.3.4

Target Segmentation: 'Wenyi Qingnian'

Immediately after recognising the value of the cultural nostalgic memory, the design team identified 'Wenyi Qingnian' as the target segment for the Forever-C project. In Chinese, 'Wenyi Qingnian (文艺青年 / literary and art youth or cultured youth)' refers to a particular group of young and creative adults who are keen on literature and art. Although it has been a highly recognisable modern subcultural group in China and descriptions of it are common in popular writings, formal definitions are difficult to come across in academic literature. For the readers' information, therefore, I provide here a description of 'Wenyi Qingnian' based on my understanding of it and my discussion with Wang during the interview. 'Wenyi Qingnian' represents China's young urban creative class. They spend a great deal of time on reading works of literature, watching artistic films, listening to music, participating in cultural events and travelling. They use Internet social networks to make friends with each other, and to search for, discuss and share culture-related information. Currently, most of them are urbanites born from the late 1970s to early 1990s. This group is mainly composed of university students (including master's and doctoral students), young practitioners in the creative industries and anyone else who identifies with such lifestyles. In terms of consumption patterns and aesthetic preferences, they prefer to use affordable but culturally oriented possessions to express their different tastes and identities. They dislike the extravagant style of the parvenus, who often spend huge amounts of money purchasing top European luxuries, simply to demonstrate their affluence. Most importantly, they represent the main forces driving the current nostalgia wave in China.

According to Wang, the selection of 'Wenyi Qingnian' was made on the basis of their intuition without any user or marketing research, as all the members in the Crossing team identified themselves as 'Wenyi Qingnian', and they believed that the nostalgic passion for Forever shared within the team would also be shared by the majority of the members of this subcultural group.

> **Wang:** *We identified 'Wenyi Qingnian' as the most important segment that Forever-C should target. We didn't do any heavy front-end user research for the project. We just felt that the target users should be people similar to us.*

The Design Process:
Retaining and Altering

The six words represented by 'C' and other important keywords such as 'memory', 'childhood', 'heritage' and 'affordable' helped the design team to initially identify what Forever-C bicycles should be. Wang defined them as '*a series of city bicycles which can provide a relaxing cycling experience, express the culture and heritage of the Forever bicycle and bring back positive memories*'. Unlike racing and mountain bikes, Forever-C bicycles should not be too expensive, make advanced technology highly visible or place emphasis only on performance. Although similar traditional (but often technologically advanced) bicycle designs have enjoyed long-term popularity in some European countries such as Holland and Denmark, there was no such bicycle series in the contemporary Chinese market before Forever-C.

> **Wang:** *The design process …We didn't do too much sketching … Forever provided us with several bicycles which were the most representative male and female models in the 1980s. They were the most common Forever bicycles and we are sure that everyone knows what they look like. The design process started directly with taking them apart … We first designed Peishan (a 26 inch male bicycle of the Forever-C series) based on the classic old male model of Forever and others were designed to follow the feeling or spirit of Peishan.*

In order to connect directly with the brand heritage and be able to evoke nostalgic memories, some traditional elements of the classic Forever bicycle model needed to be preserved. At the same time, sufficient alterations and improvements were also

Figure 28. Peishan, the first Forever-C bicycle model designed by Crossing
(photo courtesy of Forever-C, http://www.cforever.net/)

necessary to make the new Forever-C bicycles fit the current cycling environment and competition. Therefore, when designing *Peishan*, the first model of the Forever-C series, with the bicycles provided by Forever at hand, the designers focused on three tasks: 1) to extract the unique visual spirit and elements of Forever from the classic model and retain them in the Forever-C bicycles, 2) to remove any redundant components and make the Forever-C bicycles function well and look neat, and 3) to improve the size of some components based on the anthropometric measurements of average Chinese people to enable the riders to enjoy the most relaxing riding posture.

Unlike most mountain bikes which are made from aluminium and have thick frame tubes and rims, the most important visual aspect of the classic Forever bicycle model was identified as 'graceful slimness' and its frame has always been made from thin, narrow high-tensile steel in contrast. Thus, Peishan continued to use slim rims and steel frames to retain this graceful slimness. In addition, the elegant triangular frame with the horizontal top tube was also recognised as an important appearance feature of the classic Forever and this feature could greatly differentiate Forever-C from, for example, Giant's products. Moreover, the upright handlebars are also preserved in Peishan. On the basis of these retained features, alterations were also made to many other components. For example, the decorative flaring pattern was removed from the frame, the chain guard was redesigned, and a relatively smaller saddle replaced the large one. After user tests, the designers also found that the old Forever bicycle was not really well suited to the contemporary body size of the Chinese and riders often ended up having to stoop. The top tube was therefore shortened and lowered with the saddle to make sure that most riders would adopt the most comfortable and relaxing posture.

Figure 29. A comparison between the original Forever bicycle and the Forever-C 'Peishan'
(photo courtesy of Forever-C, http://www.cforever.net/)

6.3.6

Launch and Market Communication

After designing and redesigning over one hundred prototypes, the Crossing team finally created the functioning prototypes of 15 models of Forever-C. From 27 to 30 April 2010, these functioning prototypes were displayed at the 20th *China International Bicycle and Motor Fair* in Shanghai. During the fair, the design team collected feedback from visitors for further improvements to the prototypes. More importantly, the dramatic return of Forever bicycles touched Chinese visitors' hearts and many took photographs of them, posted to various social network platforms and told their friends that Forever was returning. Both domestic and foreign distributors expressed strong interest, some even wanting to buy the prototypes immediately. The responses of visitors and distributors finally convinced the company to launch Forever-C.

The promotion and sales channels of Forever-C are very much based on the Internet. Because the target consumers spend most of their spare time on the Internet, Crossing decided to build a Forever-C site and posted its first promotion on *www. douban.com*, which is a Chinese social network platform that most 'Wenyi Qingnian' visit regularly. This news soon spread to other popular social networks and was reposted over forty thousand times in one month. Thus, as the quickly growing nostalgic Forever-C fan base voluntarily spread the news, almost nothing was spent on promotion. On 9 Sep 2010, Forever-C opened its flagship shop on *Alibaba's Tmall* online shopping platform (https://foreverc.world.tmall.com/) and after

satisfactory sales, it opened experience stores in Shanghai and Chengdu in order to provide better service experience and move towards a more high-end brand position. Wang explained that '*Peishan and Iho are the two best-selling models of Forever-C and they are the ones that are most close to the original classic Forever bicycle*'.

6.4
Case 2:
Jopo (Finland)

Like trainers, bicycles are a type of product commonly involved in nostalgic memories of childhood and youth. As suggested, Forever is a phoenix brand that almost every urban Chinese (more specifically, born before the 1990s and those still alive) has personal nostalgic memories about. Meanwhile, these personal nostalgic memories are all constructed around Forever and share great commonalities across individuals, and therefore reveal a collectively remembered cultural nostalgic memory. In this sense, Forever is to the Chinese what Jopo is to the Finns. Initially, Jopo was not a brand but a particular bicycle model developed by *Helkama,* a Finnish bicycle manufacturer, in 1964. However, the influence of this name was so strong in the Finnish bicycle market and culture in the 1960s and 1970s that both the consumers and its manufacturer Helkama saw Jopo as a brand, instead of only one of the bicycle models that the company offered.

In China, Forever was impelled by the planned economy system to be the most popular brand between the 1950s and 1990s, but became dormant along with China's transition to a market economy. In contrast, Jopo succeeded in Finland's market between the 1960s and 1970s because its products were timely and original, but it was deliberately withdrawn from production in the mid-1970s because of changes in the interests or preferences of the majority of consumers. After being dormant for almost thirty years, Jopo was successfully revitalised as a phoenix brand in the 21st century and confidently claims that 'Jopo is now the most popular bike within the Nordic countries, with sales of over 350,000 bicycles!' (Jopo, 2013). In addition, in a national survey 'Kaikkien aikojen legendaarisimmaksi Suomi-tuotteeksi (The Most Legendary Finnish Product of All Time)' organised by *The Federation of Finnish Enterprises* in 2010 and voted on by 7818 Finnish participants, Jopo won the second place (Kovala, 2010).

From Dominant to Dormant

Helkama Oy is a private limited company founded by the Helkama family in 1905. One of the key business foci of Helkama has been the bicycle, especially for the Finnish domestic market. In the early 1960s, Eero Helkama, one of the key decision makers of Helkama Oy, had the idea of creating a universal bicycle that would be more affordable for Finnish families and everyone would love and feel comfortable riding, regardless of age, gender, and social class. For this proposal, Helkama organised an open naming competition in Finland and received over 28,000 suggestions. The abbreviation of the Finnish words *JOkaisen POlkupyörä* (*Everyone's Bicycle)* was selected to be the name of this special bicycle model – Jopo (Helkama & Suhonen, 2007).

Engineer Erkki Rahikainen, who was the manager of Helkama's bicycle plant, and industrial designer Ero Rislakki together designed and constructed the first Jopo bicycle. The construction, style and functions of Jopo were very special and entirely new to Finland when it was created. Instead of tubes, the frame of the original Jopo was made from pressed and welded metal plates. The frame was without a top tube, had small 22-inch wheels and the easily adjustable handlebars and saddle enabled it to be used by all members of a family from six-year-old children to 70-year-old seniors and from males to females. The single speed gave Jopo a minimalist look and the bright and vivid colours gave it a very positive, relaxing and funky image, which differentiated it from the conventional black bicycles that dominated the 1960s Finnish market. In terms of the key reasons for the success of the original Jopo, the current Managing Director Elamo and Product Development Manager Autero both attribute it to its original and unique concept and also utilitarian practicality.

> *Elamo: It is important to remember that, those days, not like today, not every family member had a bike. There were perhaps one or two bikes in the family. Jopo could be easily adjusted just by pulling the lever and adjusting the seat. The children of the family could ride the bike and so could the parents. It was a little bit of a hippie product, or what should I say … rebellious. It was a bicycle born in the era of the automobile. So, it was cool and different.*

> *Autero: Back then, people bought Jopo because it was cheaper and very practical … In my memory, to be honest, Jopo wasn't such a cult bike brand in the old days. We didn't feel that it had something so special. I must say I never had the feeling that I could be jealous*

that someone had a Jopo. Jopo was just an ordinary bicycle model that a lot of Finns had. Jopo was even cheaper in the 1960s. Maybe you could get it at a cheaper price than a normal bicycle. Today, you can get a normal bicycle with three gears at a cheaper price than a single speed Jopo.

From 1965 to 1974, Helkama produced and sold over 250,000 Jopo bicycles, mostly in Finland. Occasionally during this period, Helkama even had to stop the manufacture of all other types of bicycles to ensure they could offer enough Jopo bicycles to fulfil the market demand. On the basis of the style of the first Jopo, Helkama then developed and launched a number of Jopo family bicycles. For instance, *Jopomobil* was a foldable Jopo, *IsoJopo* was a bigger size with 26-inch wheels, *Postijopo* was designed for heavy-duty delivery use, and *Joponen* was for children even younger than five. In that decade, Jopo became a name that every Finn knew and a national icon.

> **Elamo:** *Jopo was even more popular (in the 1960s and 1970s) than today, because the manufacturing volume was even bigger than today and there were far fewer competitive products and brands. You know, during those days, there were only a handful of bicycle manufacturers in Finland. Today there are close to 50 different brands in the market.*

Figure 30. A Jopo fan's collection – a red original Jopo produced in the 1960s
(photo by the author on 21 March 2014)

Jopo reached its peak in the early 1970s but then started losing popularity. The Finnish consumers' preference for small wheel universal bicycles changed, and track bicycles and touring bicycles, especially those with multiple gears, quickly came to dominate the market in the 1970s. By then, the Helkama family had developed a very personal and affective connection with the Jopo brand and believed that it should be cherished by the Finnish in their memories. They therefore decided to stop producing all Jopo bicycles and using the Jopo brand name in 1974. As a result, Jopo became a dormant brand, but a very memorable and emotional one, not only to the Helkama family but also to Finland as a whole.

> **Elamo:** *In the 70s, when the market changed, our offerings changed. Bikes with gears gained more popularity. For instance, touring bikes with five or ten gears claimed a greater market share. Jopo became old-fashioned.*

6.4.2

Seeking a Second Life for Jopo

In 1998, twenty-four years after Jopo became dormant, *Helkama Velox* (the subsidiary of Helkama focusing on bicycle products) had the idea of developing a new universal bicycle that would be similar to Jopo. Since the managing director at the time who came up with the idea had long departed from the company, it proved impossible to interview him. But it was clear that, for some reason, the potentially increasing value of the Jopo brand had been realised in the company around 1998. The managing group asked permission from the Helkama family (the owner of the Jopo trademark) to reuse the name for a new universal bicycle. Because of the strong emotional connections that the Helkama family had with the brand and their perceived risk of jeopardising the brand in people's memories, the family rejected the request. Nonetheless, Helkama Velox decided to develop a Jopo-like universal bicycle, while branding it with a different but similar name: *Pojo*. The consequent design of the second-generation Jopo was greatly based on the design of Pojo.

> **Elamo:** *There was an old golden heritage* (of Jopo) *that the Helkama family wanted to preserve. Keeping the memory was a high priority. They didn't want to ruin that in any way … The second-generation Jopo was firstly brought to the market as Pojo, instead of Jopo. Because of the strong heritage of Jopo in the 1960s and 70s, there*

*was a risk of destroying it if the second generation didn't succeed. So,
the owner of the brand wanted to try with a different brand name.*

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6.4.3

A Simple but Clear Design Brief

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Helkama Velox is very famous in Finland, but the company has always been small. According to Elamo, the total number of employees was around sixty, of which forty were factory workers and twenty worked in management, sales, marketing and development. They did not have any in-house (industrial and graphic) designers to conduct design-oriented user research or contribute to product development. Instead, the product design and development process normally started with a design brief generated by the managing director, possibly based on information provided by marketing and sales. Next the product development manager led a small team (two people in total in the case of the development of the second-generation Jopo) to design and construct prototypes. Following this, the prototypes had to be approved by the managing director for eventual launch and production. The company outsourced some design tasks to individual designers or small design agencies in Finland, but these tasks were mainly peripheral, such as the design of small bicycle components and accessories.

After interviewing them, it was evident that the managing director and the product development manager together fulfilled the role of strategic design decision maker. Though neither of them were contemporary industrial designers by training, both of them had a very strong sense of design. This was exemplified by the managing director's sensitivity to cultural trends and market communications, and the product development manager's ability to design and construct convincing product prototypes according to a well-defined design brief.

Elamo (the Managing Director) specialised in sales and marketing, and also was a nostalgic Jopo lover. He confessed that, to a great extent, it was Jopo that brought him to the company. Although Elamo was not the one who initiated the Jopo revitalisation project, it was he who made it truly flourish again. Therefore his reflections were considered highly valuable in terms of how to sustain a revitalised phoenix brand.

> **Elamo:** *My first bicycle was a Jopo. I got it when I was four or five
> years old and first learning to cycle. This is the story that we hear
> very often from many people in Finland – Jopo has had some sort of
> role in their childhood memories. I have a picture of me by my par-
> ents, learning how to ride a bicycle on a small blue Jopo. The circle*

was completed when I came to Helkama to market Jopo bikes. Jopo was perhaps one of the reasons I became interested when Helkama was looking for a Director of Sales and Marketing in 2007. It was a brand that truly interested me and something that I wanted to work with. It has been a pleasure to be the Managing Director of the company and I'm still responsible for the Marketing. And I have a lot to do with Jopo and I love that part of my job here.

The design and development task of the second-generation Jopo (Pojo in 1998 and 1999) was carried out by Autero (the Product Development Manager). Autero was educated as a mechanical engineer and had been working for the company since 1977. He generally avoided overly emotional discussions about the history and nostalgia of Jopo, instead keeping the interview conversation at a technical level, focusing on how he designed the second-generation Jopo. It was apparent that he wanted to stress that the success of Jopo's revitalisation was mainly because of good functional design and to downplay the importance of the Finnish cultural nostalgic memory associated with Jopo. Nevertheless, while talking about how he fought against the company's decision to outsource the production of Jopo bicycles to Taiwan and his daughter's love for Jopo, the intrinsic motive for him to work at this company for thirty-seven years gradually emerged.

***Autero**: I told my daughter that the one she had was much better than Jopo, because it has bigger wheels and gears that would make riding easier. But my daughter said, "no, no, all the others have Jopos, I want one too".*

For Autero, the design process started with a very clear design brief from the managing director, which sounded simple but was actually rather difficult: *'Taking Jopo as an excellent historical example … could you make a new universal bicycle which looks as similar as possible to Jopo?'* Autero further explained: *'Designing the second-generation Jopo was a difficult job. To get a similar feeling of the original one, but it was new … The frame of the original Jopo was welded from two plates, but I needed to build it with tubes … In a way, it was an impossible job.'*

6.4.4

The Design Process:
Retaining and Altering

He stated that a particularly tough design decision related to how similar or different the new Jopo should be to the original design from the 1960s, or what should be retained and what should be changed. Although a lot of design details have been altered, significantly changed or discarded in the second-generation Jopo, the second-generation Jopo inherited the design spirit of the original Jopo through the retained essential signature elements. Apart from that, the original Jopo logo designed in the 1960s was marked on the new Jopos without any alterations, and four essential design features of the original Jopo were identified and retained: 1) *the geometry and size of the frame, 2) the colourfulness, 3) the high adjustability,* and 4) *the single gear*.

Firstly, when designing the second-generation Jopo, Autero actually made many changes in the frame. The frame is no longer made of pressed and welded metal plates, but of high-tensile steel tubes, which was mainly intended to give the new Jopo a modern character as well as limit the manufacturing cost. However, the exact geometry and size of the frame were inherited from the original Jopo. To a great extent, the geometry and size of frame determine the visual signature of a bike. This point was also apparent in the Forever case. In addition, along with the height of the handlebar, the frame geometry and size also meant that the rider's posture would remain unchanged, allowing riders to enjoy the same relaxing riding interaction with the second-generation Jopo as they could have with the original Jopo.

> *Autero: There is actually quite a big difference (between the frame of the original Jopo and the new Jopo) … But, the geometry of the frame is quite the same. Like the head tube angle, seat tube angle, the driving geometry and so on, they are quite the same as those of the old Jopo.*

Secondly, colourfulness was also an essential character of the original Jopo that was identified and retained in the second-generation Jopo. Autero stressed many times that Jopo's various and vivid colour options were crucial for its success. The colourfulness of the original Jopo bikes imprinted a unique impression on people's minds that Jopo is positive, relaxing and funky in comparison with the serious-looking black bicycles that were the norm back then. Even though it was not clearly stated, the design style of vivid and saturated colours plus minimal and simple shape also suggests Jopo's Finnish roots and the zeitgeist (i.e. the 1960s and

Figure 31. A comparison between the original (up) and the second-generation Jopo
(photos courtesy of Helkama Velox, http://www.jopobikes.com/)

1970s) it represents. For example, a similar design style can also be found in Finnish design master Eero Aarnio's works, such as *Ball Chair* (1963) and *Pastille Chair* (1967), and also Sarvis' tableware *Katrilli* (1969) by Tauno Tarna, and *Pitopöytä* (1976) by Kaj Franck. In addition, Autero concluded that the availability of the Jopo bike in one's preferred colour was a major determiner for teenage female Jopo fans' purchasing decisions.

> ***Autero:*** *If a professional or semi-professional bicycle racer or lover comes to the store and wants to buy a specific bicycle, he (the salesperson) can change the guy's mind, opinion about which bike is the best for him. But, if there is a girl asking for a pink Jopo, if you don't have a pink Jopo, she leaves. Nothing else can solve the problem … For Jopo lovers, they are not going to the stores to buy a bicycle, but a Jopo, in a particular colour, especially in the case of girls.*

Thirdly, high adjustability was another signature quality of the original Jopo. The bicycle was originally designed for enabling easy adjustment for riders with different heights and riding needs. Although it might not be necessary for current user needs, as bicycles have been an affordable and personalised type of product, the seat height of the second-generation Jopo is still easily adjustable without

having to use any tools. To further improve usability and adjustability, Autero did not stick to the original Jopo's handlebar, which was a longhorn cruiser handlebar with a long stem. He redesigned the handlebar to be higher, but with a shorter stem. According to Autero, the managing group did not approve this new handlebar design in the beginning and asked him to change the design to be more like that of the original Jopo's, but he insisted that this change must be made to improve functionality.

> *Autero: Actually, when I made the first prototype, they (the managing group) said that 'it's OK, except the high handlebar. Please make it as it was in the first Jopo'. I said 'no, because this is much better' … There is really better adjustability with the higher handlebar … I was so crazy that I did not change it. Now, they don't want to change it back anymore.*

Finally, the single speed gear was kept in the second generation. Although today's Jopo family includes a new model (Jopo-3) equipped with a three-speed internal gear hub, the second-generation Jopo developed in 2000 was a single-speed bike and it is still called 'the classic' on Jopo's website. Considering it from a utilitarian perspective, a single-speed bicycle seems to be outdated in the 21st century. However, the single-speed gear clearly suggests that the Jopo is meant for more relaxing, slower and simpler use, such as short urban commutes or riding during a beach holiday, rather than long-distance commutes, mountain biking or road racing. Furthermore, single-speed allowed the second generation to retain the neat and minimal visual style that the original Jopo had. In the interview with Elamo, he summarised his opinion on the design and success of the second-generation Jopo thus:

> *Elamo: We have tried to, if not copy but adapt the Jopo's heritage from the 1960s and 70s. Certain things remain the same. The product itself, even though it looks different and is manufactured in a different way, has the same fun and relaxing driving geometry. It was a crucial element of the Jopo brand in the 60s and 70s with its bright colours. And it is the bright colours that drive Jopo forward today as well. We respect the history and we learnt from it and we adapted it to today's situation. Even the brand logo, how the 'Jopo' is written, is still exactly the same as it was in the beginning. We just added lines at both ends of the logo. Other than that it is very true to its origins from the first generation … We benefited from the fact*

that the Jopo was in the market earlier. So the second generation's
launch has been a comeback. If the Jopo had not been successful in
the early days, we would have had to invest a lot more into market-
ing, or the product would not exist at all.

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6.4.5

Launch and Market Communications

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In 1998, Helkama Velox launched the newly developed Jopo-like bicycle branded as the 'Pojo' for a trial. It was not very successful, though the only difference between Pojo and today's second-generation Jopo was the wheel size. According to Autero, only several hundred Pojo bicycles were sold from 1998 to 2000. Autero further explained that 'Pojo' sounds similar to 'Jopo', but in the Finnish language it doesn't have any meaning, whereas Jopo has – *JOkaisen POlkupyörä*. In this sense, the signifier (Pojo) did not represent an appropriate signified in people's minds. Therefore, it is also reasonable to believe that the Pojo brand did not significantly connect emotionally with the Finnish public through evoking their cultural nostalgic memory of Jopo. Even though some might have linked Pojo with Jopo, it was more likely to be perceived to be a mere inauthentic imitation of the original Jopo. In 2000, the company finally decided to take the risk of reusing the Jopo brand name and with minor design alterations, the second-generation Jopo was officially launched.

The power of cultural nostalgia was not used effectively in the early years of the second-generation Jopo, because most Finnish people were unaware that the Jopo had returned. This may be attributed to two reasons. Firstly the company wasn't able to invest in marketing. Secondly in the early 2000s, most Internet-based social networks (e.g. Facebook, Twitter, YouTube), which serve as the most common communication channel for the later revitalised phoenix brands (e.g. Forever and TDK), were not yet available. As a result, the sales volume had a very slow increase before 2005, because of which the company almost decided to halt the project. According to Elamo, Jopo's annual sales remained three to five hundred from 2000 to 2004. But in 2005, sales soared to over five thousand, and the increase has been continuous with approximately twenty-three thousand being sold in 2013. Therefore, everyone agreed that Jopo was only truly revitalised in 2005, even though the launch of the second-generation Jopo occurred in 2000.

Elamo: In the beginning it wasn't very successful. Yearly, the volume was quite low, only a few hundreds, maybe three to five hundred, in that range. That was obviously not enough. We first achieved a sales volume in the range of five thousand units in 2005 … There was not much marketing activity for the product. The marketing was more or less word of mouth about user experience and comments. The marketing budget was very small and the company couldn't afford big marketing campaigns.

When inquiring what happened in 2005 to truly revitalise the second-generation Jopo, evidence from various sources all pointed to the 2005 bumper videos of Nelonen, a Finnish TV station. Nelonen created these fifteen-second bumper videos for use as station identification and played them before and after every commercial break. Without any involvement from Helkama Velox, Nelonen used the second-generation Jopo as the main prop in these videos, which announced Jopo's comeback, and more importantly stimulated the Finnish public to recall their nostalgic memories about Jopo.

Elamo: One interesting thing happened in the year 2005, which according to many people was why the sales volume started growing dramatically – Jopo gained quite a lot of credibility thanks to the TV channel Nelonen, which made short films about one guy riding a Jopo and doing wheelies, you know driving on your back wheel only. It was something that Helkama was not involved in and they made the short films, I think they were fifteen seconds long, to show at the beginning and end of every single advertising break. The short films were the identification films of the commercial TV channel. So, every advertising break showed the films twice – hundreds of times per day. It had nothing to do with Helkama, it was totally for the TV channel. They just decided to use our product for their own advertising. That visibility must have been worth hundreds of thousands of Euros in advertising, and we got that totally for free. This guy was doing wheelies on a Jopo bike at famous places in major Finnish cities. He was riding along the Aura River in Turku, he was riding at the Senate Square in Helsinki … As a TV viewer, you could see, ha, now he is in Tampere, now he is in Helsinki and so on. And Jopo was recognisable.

'Target' Segmentation:
From the Urban Creative Class to Youths

According to both Elamo and Autero, the design and development of the second-generation Jopo was conducted without any front-end marketing or user research. Until they launched the second-generation Jopo in 2000, its design and marketing strategies and the target segmentation remained relatively unclear to the company. According to Autero and Elamo, this was because the second-generation Jopo was considered only one among more than a hundred different market offerings that Helkama produced, and they were not able to allocate sufficient funding for front-end user and marketing research.

> **Elamo:** *We have to remember that at that time Jopo was only one model in the Helkama brand's range of 100 SKUs (stock keeping units). Putting great effort into just one model is not something that you do.*

Apart from a lack of funds for design and marketing research and campaigns, Autero also attributed the unclear target segmentation in the early years of the second-generation Jopo to the original idea behind Jopo, which was to be a universal bicycle model that everyone in the family could ride and like.

> **Autero:** *In the beginning we didn't have the target group in our mind. But basically it was adults. But nowadays youngsters are [also in the target group]. It wasn't so important because it was a universal type of bicycle. It's for the whole family.*
>
> *The (design) decision was based on intuition. We have never concentrated on one type of bicycle in our commercials. We are such a small company and we have so many models, it's impossible.*

Instead of targeting a specific predefined market segment from the very beginning, a specific consumer group unexpectedly emerged as the first adopters of Jopo after its return. Elamo named them the *urban creative class* in Helsinki.

> **Elamo:** *When the second-generation Jopo was launched, the first adopters were mainly university students. I would say 20-to-25-year-olds, university students, young adults who had just had their first jobs, often those who were in creative jobs. I would say market-*

ing people, advertising creatives, fashion designers and all kinds of
designers. They were creative class people. They were very urban,
and mainly lived in Helsinki.

With this age profile, it is probable that many of these urban creative people were too young to have much direct experience of the original Jopo in childhood. But their parents were teenagers during the years when Jopo was invented and became extremely popular. Thus it is very likely they heard their parents' stories about Jopo or saw Jopo in old photographs of their parents. In addition, considering the durable quality and longevity of the original Jopo bicycles, it was also possible that these urban creative class consumers even rode their parents' old Jopo bicycles. Such experiences of Jopo might well break down the boundary between true nostalgia and vicarious nostalgia.

After years of Jopo's successful revitalisation, the age range where its largest group of fans is found is evidently getting broader and younger. Although Elamo rejected my request to be granted access to their official market statistics, he explained the current Jopo fans' composition through what he could see on Jopo's Facebook page. Elamo himself is managing the Jopo page on Facebook, which has over 85,000 followers. He has used it as an effective way to maintain the fans' community, communicate the Jopo's brand message, detect who are the most active Jopo fans and for whom they should design new Jopo products in the future.
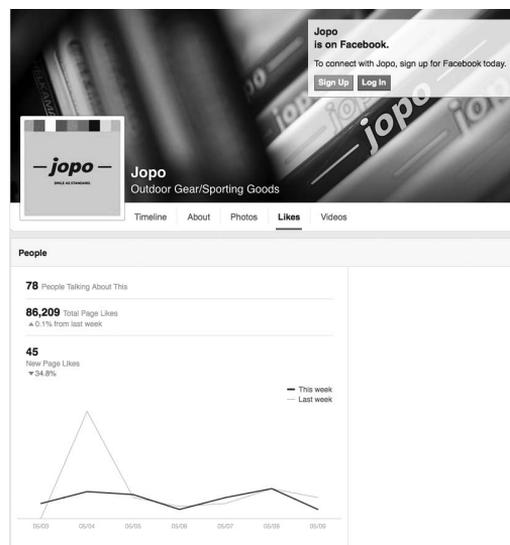
Figure 32. A screenshot of Jopo's Facebook page on 9 May 2016
(https://www.facebook.com/Jopo-74049787702/likes)

Elamo: *Jopo is nowadays targeting and being accepted by quite large and diverse groups of users. You can see that clearly when you visit the Jopo Gathering Ride Event every August. Among the participants, the youngest are 8 to 10 years old, and the eldest are in their 60s and 70s. So, Jopo is like its name says 'Jokaisen Polkupyörä', a bicycle for everyone, no matter the age and sex.*

If we look at our fans on Facebook, we have quite a strong community with 85,000 Jopo fans. About 70 per cent are female, 30 per cent male. The biggest groups of Jopo fans are now in the 10 to 15 and 15 to 20 age groups. The average age of Jopo fans has come down … So now, the popularity of the new Jopo product range is also growing among the younger audience …

As time has gone by, the average age has come down, because the users have been the idols of their little brothers and sisters and younger cousins, or the neighbours' children.

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6.5

Case 3:
TDK Life on Record (US + Japan/global)

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If you were neither Chinese nor Finnish and have never lived in these two countries, it is most likely that you have never heard of Forever and Jopo before reading this chapter, and of course have no nostalgic memories related to them. However, the brand name TDK may well evoke a cultural nostalgic memory shared by people from many different cultures who are now in their 30s and 40s, loved music and made mix-tapes as teenagers.

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6.5.1

From Dominant to Dormant

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In the early 1930s, two Japanese scientists, Yogoro Kato and Takeshi Takei, invented the first magnetic material – ferrite. Then, TDK was founded in Tokyo in 1935 as the first manufacturer of ferrite for commercial purposes. The original name of TDK was *Tokyo Denki Kagaku Kogyo* and it was later changed to the abbreviation 'TDK' by taking the initials of the first three words in its original name (TDK, 2015). From the very beginning of TDK to the present, it has always been a very successful

B2B company providing high-quality passive components, applied magnetic products and film products. Most of TDK's current products now seem to be remote from the general public, and perhaps most youngsters have never heard the name. However, during the 1980s and 1990s, TDK actually used to be a well-known brand among young music lovers across the world, and deep-rooted in the music culture, more specifically the mix-tape making culture.

Though it was *Philips* that invented the compact cassette and firstly introduced it in 1963, the sound quality of these early cassette tapes was too low to be used for music recording. TDK's later introduction of the Super Dynamic (SD) cassette allowed high-fidelity audio content to be recorded on cassette tapes for the first time ever (TDK, 1971). Improvements in cassette tape technology then directly enabled it to become one of the two most common formats (alongside the earlier LP and later CD) for pre-recorded music from the early 1970s until the late 1990s (Daniel, Mee, & Clark, 1999). In addition, with the development and global popularisation of cassette recorders and players (e.g. Boombox, Walkman), self-crafted music mix-tapes became extremely popular in the late 1970s until the late 1990s. To a great extent, mix-tapes were a type of artwork created by youngsters to express themselves, such as to confess love (i.e. the romance tape) or to express sorrow (i.e. the break-up tape). Furthermore, mix-tapes, as 'hip-hop's original mass medium' (Ball, 2008, p. 10), were also directly linked to the emergence and global development of this music genre. The influence of mix-tape and cassette culture to today's mature creative practitioners when they were young is well presented in the book *Mix Tape: The Art of Cassette Culture* (Moore, 2004), in which over fifty mix-tape makers share stories about their mix-tapes. Accordingly, as one of the global brands providing premium quality blank cassette tapes, TDK naturally formed a strong emotional tie with young music lovers across different cultures at the time.

However, when other more convenient and cheaper digital formats (i.e. CD, MP3 and online streaming) boosted the accessibility of music, cassette tapes became globally obsolete by the early 2000s. At the same time, the connections between the TDK brand, music and music lovers were broken, though TDK successfully followed the trend to produce CDs, DVDs, memory sticks and cards. Consumers who personally experienced the cassette era had seemingly forgotten their affection for this brand as a cultural icon in relation to music and younger generations were too young to know what TDK ever represented. In this sense, cassette tapes, as the obsolete body of music once used by almost every teenager, enjoy a strong nostalgic bond with those who are now in their 30s and 40s. As one of the most representative brands for the cassette tape and the culture built on it, it is reasonable to believe that a similar nostalgic bond was also attached to TDK, after it had been dormant for a decade.
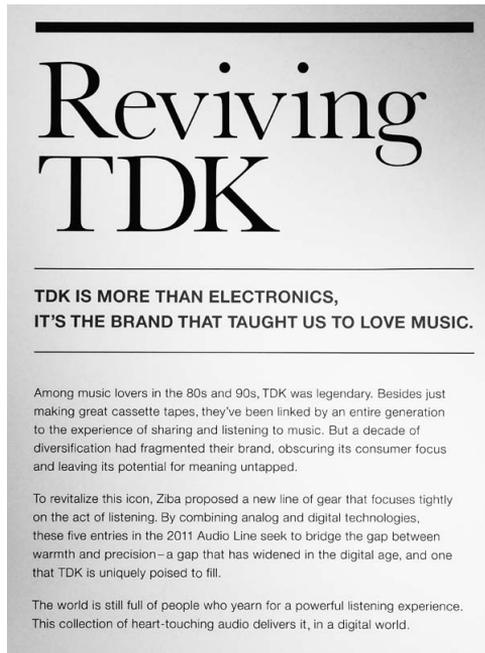
Figure 33. Ziba's statement for the TDK brand 's revitalisation

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6.5.2

Reviving TDK

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As previously mentioned, TDK had always been a successful and highly profitable B2B company, but in the B2C environment, it had lost its connection with ordinary consumers. In 2009, TDK planned to extend their product categories and approached design consultancy Ziba – based in Portland, Oregon – with a very open mind, asking what they should produce next to take full advantage of the brand, especially in the B2C market. O'Connor, the Creative Director of Ziba at the time, led the design team for this project.

> *O'Connor: They (TDK) came to us looking to see what kind of stuff they should be making to take advantage of this brand that they own. And, at the time they came to us, they were making a lot of commodity-grade products, like you could find two- or three-dollar ear buds in a drug store. They were making optical media like CDs, DVDs, that kind of thing … as cassettes went out of favour, they just started putting their name on the next thing, which was storage. But once people migrated to CDs and DVDs, that whole idea of making something and giving it to someone kind of stopped.*

6.5.3

Inspired by the Cultural Nostalgic Memory

Although TDK approached Ziba as a new client with a very open brief, O'Connor and his design team almost instantly identified strong and deep emotional connections with the brand and intuitively grasped the right direction to go. In his own reflective article on the TDK project, O'Connor expressed his design team's nostalgic excitement at the very beginning of the project thus: *'The designers on the project team grew up in the 80s and early 90s, so the name (TDK) brought a flood of memories, of unwrapping a fresh cassette in front of the stereo, crafting a mixtape for some road trip, some friend, some girl'* (O'Connor & Alviani, 2011). In the interview, O'Connor confirmed again that the design team was directly inspired by the cultural nostalgic memory associated with TDK (i.e. the nostalgic memory of cassette culture) that was shared by everyone in the team at the very beginning of the project.

> **O'Connor:** *When we first talked about TDK, we went back to not … not the cassette tape itself necessarily, but it was more like the active creation in capturing memories and sharing memories that we were really intrigued with, and a lot had to do with this relationship. In the 80s, you spent a lot of time trying to hit playing record [laughter] right? Making your own library of the radio, whatever, you would make the mix-tape, giving it to somebody. So, it's almost like the cassette tape is a currency. And we were really intrigued by that powerful nostalgic reminiscent connection that people had to the brand in that way. So, we kind of went back to the moment in time and started building our story from there.*

Not only did the designers at Ziba share this cultural nostalgic memory of TDK, I deeply resonated with it too. Like the designers involved in this project, I was a teenager in the 1990s (but living in Mainland China), and like many of my peers, I had my own collection of music in the format of cassette tapes. I had a (Sanyo) boombox with two cassette docks and FM radio function, through which I made a lot of mix-tapes. Although I was unable to afford to use TDK cassettes for all my mix-tape creations at the time (most of them were recorded over my English listening cassettes), I always wished to. Thus, the brand name recalled a personal fantasy and an unfulfilled youth dream. At present, I have been using my smartphone to enjoy streaming music for many years and left my old cassettes and boombox in storage for almost fifteen years. Many of my teenage musical experiences have

Figure 34. TDK Life on Record Project being displayed in the front lobby of the Ziba Headquarter building in Portland, Oregon on 12 Nov 2012 (photo by the author)

become part of my positively remembered memory – my nostalgic memory.

The design team, with such a pre-existing nostalgic bond with TDK, naturally had an awareness of the heritage and increasing sociocultural value of this brand. As a result, they quickly concluded that TDK needed something that could reignite the original passion and rebuild the affective connection between music lovers and the brand. Music-related products were therefore clearly identified in a relatively short time.

> **O'Connor:** *In the very first few weeks of the project, we looked at a lot of categories. We looked at gaming, soft goods … It didn't take us very long to realise the … [music] … So, if the brands were strong enough, over time the brands can be migrated away from what they were originally known for. But in this case, the brand had been almost dormant for 20 some years … We knew we were at the moment when we had to kind of make a rebirth or re-announcement of this brand. So, we had to come back to talk about what types of products or what categories would be near enough to the centre of TDK. That's why music was the right answer, as opposed to gaming*

Figure 35. Four Insights into the State of Digital Music
(Photo taken by the author at Ziba's Headquarter in Portland, Oregon on 12 Nov 2012)

6.5.4

Digi-Log: Balancing Digital and Analogue

After deciding on 'music-related products' as the strategic direction for the following design concept development, the designers further reflected on their own nostalgic memories related to TDK and the rapid changes in music listening culture and behaviours in detail. They realised that one of the most important reasons for the TDK brand becoming dormant in the B2C market was the development of digital technology, which completely changed the landscape of contemporary musical distribution and recording.

They found that the TDK brand is strongly connected with the analogue musical experience associated with special multisensory qualities, such as the tactile experience of opening a brand new pack of cassette tape, touching the lyrics sheet, turning a volume knob, the visual pleasure of reading a physical lyrics sheet, and its memorable smell. When consuming digital music became dominant as a more convenient and cost-efficient way to listen to music, the multisensory qualities of musical experience tended to disappear. So did the special connection between TDK and music lovers. Subsequently, the designers tried to clarify the pros and cons of both analogue and digital musical experiences and established the design theme as 'Digi-Log', which means to mix the strengths of digital and analogue (or old and new) in one product in order to facilitate a better musical and nostalgic experience.

O'Connor: *Digital allows you to have access to a lot of things, makes things very easily acquired, but at the same time you are compromising the tactile interaction you used to have. So our original hypothesis was, because TDK's most reminiscent connection was from this era when people still touched, felt and interacted with things, we needed to make a connection to that, you know, former experiences and memories that we all have, and try to mix it with, in some interesting way, the digital experience we have today. So it's very interesting and became a design theme – we call it 'Digi-Log' – exploring the tension between the digital and analogue experiences.*

The design team then concretised the abstract theme of the 'Digi-Log' musical experience through a series of premium audio products, including two boombox models (three-speaker and two-speaker), one sound cube, one headphone set and one turntable. Among them, the three-speaker and two-speaker boomboxes were perhaps the most astonishing. Though TDK had never been famous for boomboxes or any kind of cassette recorders and players in the past, boomboxes frequently appeared in TDK's magazine advertisements in the 1980s. In addition, the boombox, as an essential player of cassette tapes, was a genuinely integrated, unforgetta-

Figure 36. The TDK Life on Record products designed by Ziba.
(Photo taken by the author at Ziba's Headquarter in Portland, Oregon on 12 Nov 2012)

Figure 37. A comparison between 1980s boomboxes
up: photos courtesy of Lyle Owerko's *The Boombox Project*) and the new TDK boomboxes
down: photos courtesy of TDK.

ble, iconic element in the cassette culture and analogue musical experience. There-
fore, a natural connection between TDK and the boombox can be easily sensed and
accepted by a specific demographic. Besides, unlike attempting to re-popularise
cassette tapes themselves, as it would be too difficult to make the new products rel-
evant to today's digital lifestyle, a well designed and elaborately crafted boombox
might be desired in many different contexts (e.g. a party) for various reasons (e.g.
sharing music) in the digital era.

According to O'Connor, once the theme and concept of audio products were
specified, the design team went through a very typical industrial design and user
interface design process: sketches, cardboard prototypes, functioning prototypes,
and evaluations and improvements in between. I therefore asked O'Connor to
reflect on what were the most special aspects of the design process of the TDK
project that were different from the other projects they had completed. The results
of O'Connor's reflection shared many commonalities with those of the cases of
Forever and Jopo.

Firstly, he indicated that looking back to the cultural nostalgic memory and his-
tory of TDK provided an invaluable source of inspiration. In the case of most design
projects, designers look at what is happening at the moment, and user research is
often just a limited focus on what people would like to have now. Then, based on
such information, designers imagine what may be appropriate in the future. How-
ever, in the TDK project, the designers' introspection and sharing of their own rel-
evant memories and emotions, and the review of the brand's history, played an even
more crucial role than examining the current competitive landscape.
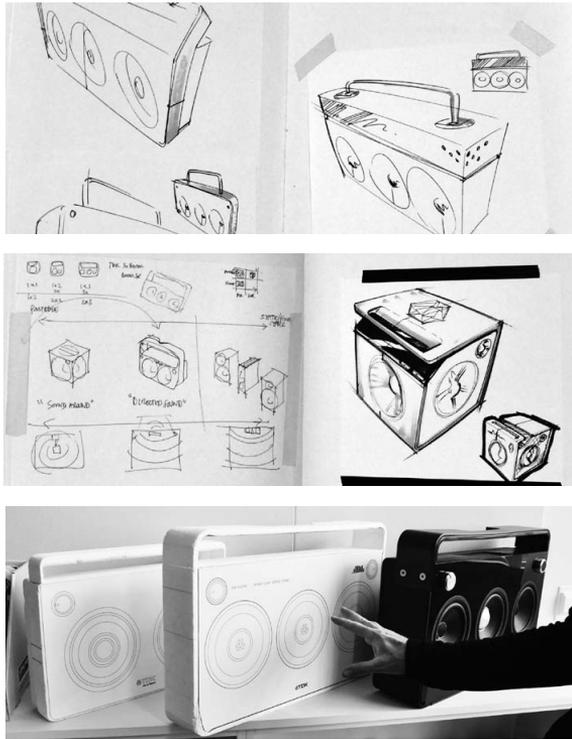
Figure 38. O'Connor introducing the design process, and showing the sketches and prototypes of the TDK Life on Record audio products to the author

O'Connor: *When designing something, one of the common things we do is that you look at the competitive landscape, so if you are designing a mouse or a lamp, whatever, you are going to look at – Where are the lamps (designs) today? Who's doing what with lamps? Who's doing what with mice today? But with this project, I always looked back and thought it really felt like we kind of got into our time machine and went back to that time. And we really had a lot of fun, remembering what was happening back then, why were people actually carrying boomboxes down the street. They actually did that in the 80s. So, I think what was different here was [that in a] normal design process you do an audit, you kind of look at what's happening now. I guess here we got to play more of a historians' role. Such a way to be inspired by the past might not normally be there for a project.*

Secondly, user research was conducted only at the end of the project, and mainly for developing a long-term design strategy for TDK. The strategic design direction, opportunity, theme and concepts did not emerge from the research and objective evidence, but from the designers' introspections driven by passionate engagement.

> **O'Connor:** *We knew that within the first month. We think there is something interesting with digital and analogue, we think it's relevant to what people are missing in their music experience, which is something [that] could be authentic to the TDK brand. So we started designing those boomboxes right away ...What happed was everyone felt great about those products and then the research programme was designed to give us better understanding of what was happening with digital and analogue, and also paint a fuller picture of where else we could take the brand to. So, it wasn't like we used the research to discover the boombox concept. We kind of already knew the boombox would be cool, it was just intuitive.*

Thirdly, they did not compromise for convenience (or contemporary portability of digital devices), but went very extreme to ensure an anachronistic but meaningful style. In general, the archetypal image of the boombox was tough and formidable in comparison with today's mainstream portable speakers. They are huge and heavy, with large drivers, physical knobs and buttons, solid edges, and a chrome aesthetic, and they work portably only with heavy D batteries. For readers who are too young to have such an archetypal image in mind, the photography book *Back in the Days* (Shabazz, Freddy, & Paniccioli, 2001), which documents the 1980s street style and fashion in NYC, can help to understand it visually. In order to make the TDK boomboxes an appropriate memento of that particular cultural nostalgic memory, they were intentionally designed to be extremely heavy and large. The three-speaker model has product dimensions of 22.4 by 70.6 by 49.5 centimetres and weighs 14.5 kilograms. It contains three exposed speakers that offer full-range high-quality sound, including one six-inch subwoofer and two coaxial drivers. Slightly smaller and lighter, the two-speaker model has product dimensions of 12.5 by 52 by 34.5 centimetres and weighs 10 kilogram. Exceptionally heavy materials, such as thick aluminium and solid wood were used to craft them. Both of the models have two aluminium rotary knobs. The one on the left is the switch and volume control, and the one on the right is the control for bass and radio tuner.

It sounds tough and humorous that if the users want to take their TDK boomboxes out as they used to do in the 1980s and 1990s, they have to do exactly what they did in the old days – install ten (for the two-speaker model) to twelve (for the

three-speaker model) D batteries inside the boombox. These retained or even exaggerated features of old boomboxes brought back the tactile quality and the warmth of analogue back to the digital era. At the same time, the product design and the heritage of the TDK brand achieved great synergy, which successfully captured the zeitgeist of the 1980s music experience and facilitated users' nostalgic memory retrieval and cultural nostalgic experience. In addition, the bold and rebellious style not only clearly differentiated the TDK brand from its major competitors, who generally followed the mainstream trend of making devices thinner, smaller and lighter, but also presented a very loud signal to music lovers that the TDK brand as a music culture icon has been revived.

> *... How big should it be? Our first volume study was intended to find that line of acceptability, and then go way past it. We knew the first white foam model was big enough when all the Europeans in our office started complaining -- they really thought the size was offensive. We debated shrinking it by 20% or so, but by this time we'd gotten so into the attitude of the boombox that the consensus was 'if anyone asks us to make it smaller again, we'll make it bigger'.* (O'Connor & Alviani, 2011*)*

Finally, in spite of the highly recognised importance of looking back at memories and the anachronistic style of this project, O'Connor also stressed that simply reviving the boombox as it was in the 1980s was not the objective. The theme of 'Digi-Log' had been driving them to explore a meaningful way to combine the advantages of digital technology with the warmth of analogue. Therefore, the appearances and interaction style of the TDK boombox models were significantly simplified by implementing a slick and neat digital touch screen as the front control panel. In addition, on the right side of the panel, there is an LED display showing bass and treble information, menu browsing, and the visual equalizer. When discussing this point during the interview, O'Connor explained the meaning behind the design decision and his thoughts on the differences between retro design and nostalgic design.

> **O'Connor:** *We were trying really hard to avoid being retro in the TDK project. I think it explains why, if you look at the (TDK) boombox, it's very iconic, but it's pared down and simplified, it's not fussy and filled with details. It doesn't have a lot of little switches, that kind of stuff ... it was three speakers, two knobs and a handle, done. We were trying to make it iconic, make it nostalgic, reminiscent but not retro. The idea that was unique to this project was being more*

[like] historians and trying to treat the past with respect but not rip it off, not try to ape it or copy it directly … We were not trying to replace the old experience so much. We were trying to issue some new challenges and kind of redefine today's experiences.

From a practitioner's perspective, O'Connor's comments resonated with my own argument (in Chapter 3) about the differences between 'retro (appearance) design' and 'nostalgic experience design'. The former is more often understood as an over-simplified visual imitation of an old classic product. The latter is a design approach or strategy focusing on evoking nostalgic experience (not necessarily through visual cues only) and at the same time achieving a good balance between the old and new.

6.5.5
Target Segmentation: Music Prophets

The design team in the TDK case started with introspection, conception and design immediately. The boombox concept was almost intuitively generated. Only after the mid-point of the project did the design team specify the target segmentation – '***Music Prophets***'. In short, music prophets were defined as passionate and creative male music lovers. They are not necessarily professional musicians, but they consider music to be an integral part of their lives, possess large music collections, love listening to, talking about and experimenting with music. Later, the design team conducted user research in Berlin, Sydney, Tokyo, San Francisco and Manchester, observing music prophets' behaviours and inviting them to talk about their musical experiences. The user research was not used to explore and identify the design problems or opportunities, but to prove the design hypothesis they created through introspection: ***that there is a growing nostalgic need for re-experiencing the cherished aspects of analogue musical experience in the digital era***.

The user research confirmed some common dissatisfactions with the digital musical experience in comparison with the analogue musical experience among music prophets across various cultures. For example, everyone is now able to possess and carry thousands of hours of music in their pocket, but few sit down and really listen to it as people used to do in the past. Such cultural nostalgia is not what Davis (1979) calls simple nostalgia, as it involves reflections on what good aspects are missing in the present while acknowledging the progress and conveniences brought by digital technology. As noted by the designers, 'no one actually wished they lived in the 80s, but they missed the purity of experience you got out of analogue. Even

guys in their early 20s, too young to have recorded an actual mix-tape, would talk about how unsatisfactory digital listening was' (O'Connor & Alviani, 2011). In addition, though the initial objective of this user research was not to see how international this cultural nostalgia impact might be, it strongly suggested its cross-cultural influence. Though the music prophets grew up in different cultures and speak different languages, the things they talked about regarding their musical experiences were the same – vinyl, turntables, cassette tapes, boomboxes, Walkman, CDs, MP3s and iPods/iPhones. The results of the research reassured the design team that TDK, as a brand closely connected with analogue musical experience, had great potential to be revitalised through a nostalgia-driven design strategy. Furthermore, O'Connor also expected the TDK brand and its new premium audio products to appeal to younger music lovers.

> *O'Connor: That's what we were doing with the older crowd, let's say over 30 – we were saying: Hey, you probably remember some of the experiences, we've mixed it now. So you can take what you know today and kind of bring some of the old sensibility to life. For the younger crowd, let's say under 30, it's more about tapping into their awareness that they did miss something and here is the opportunity to connect with that without having to sacrifice. The only thing they've ever known is the digital music.*

6.5.6

Launch and Market Communication

TDK launched the new series of premium audio equipment in March 2011. These products were first available from online stores targeting the North American market, such as Amazon.com and Bestbuy. Then, within a month, they started being exhibited and sold in stores (TDK, 2011). In the following months, they also became available in Asia (e.g. Japan and Singapore) and Europe (e.g. the UK, France, Germany, and Nordic countries). Most major media websites focusing on consumer electronics emotively reported on the return of TDK. Many media editors who had the opportunity to directly interact with the boomboxes found it a moving experience that evoked cultural nostalgia. For example, Donald Bell, a Senior Editor at *CNet,* humorously expressed his nostalgic excitement when seeing the TDK boombox for the first time: 'They had to pry this thing out of my hands. My apologies to TDK. They shouldn't have had to see me cry like that' (Bell, 2011). Bell's words resonated with a large number of consumers who knew what TDK meant to music.

Of the 72 customer reviews on Amazon.com (retrieved on 18 April 2016; the most recent one was published on 15 Nov 2015), 54% gave five stars to the three-speaker boombox model, and it received an overall score of 4.1. To a great extent, the most helpful positive review by an Amazon verified purchaser might well shed some light on how consumers appreciate the design, craftsmanship and the return of TDK:

> *I just received this beautiful monster and I couldn't be more happy … Upon arrival, the first thing you'll notice immediately is just how enormous and heavy this Boombox is; it feels solid and has an aura of quality (and it weighs like 30+ pounds!). From the wood handle to the silky-smooth rotation of the metal dial to the touch-screen panel controls, to the beautiful backlit displays (with good typography) it feels more like what you'd expect from Lexus, Leica or Bang and Olufsen than TDK, clearly their design team was trying to make a statement that TDK is back, and it appears they've succeeded with this stunning example … If you're a lover of design, high-quality construction and full, balanced sound I recommend checking the 3-speaker boom box out for yourself. (Beaver, 2011)*

Of course, such an expressive design would not possibly please and appeal to everyone, especially for those who were seeking for convenience or portability (utilitarian value) rather than a memento of cultural nostalgic memory (sociocultural and hedonic value). For example, another Amazon customer gave a one-star review to complain about the weight and size:

> *'Really, that much money for a heavy (40lbs!) awkward box with speakers. Be ready to put this monster in 1 place and leave it there, cause you won't wanna move it around. The sound is 1 dimensional with [an] interface that just isn't intuitive. Also, be willing to drop a bunch of money for D cell batteries. You heard it, D cell batteries, which is my grade for this thing … D'* (Uberpunkt, 2011).

In fact, O'Connor and his team expected such a critical reaction. Nevertheless, they decided to take a bold initiative and push the final design boundaries to an extreme, rather than compromising and ending up with a more mediocre product that more people might like but nobody loves. That possibly explains why when such a negative review appeared, five other Amazon customers posted disapproving comments against it, including one doubting that the negative opinion was

based on a direct experience of using the product as it was not marked by Amazon as a Verified Purchase.

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6.6

Conclusion

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This chapter has provided detailed narratives for the three cases involved in the multiple-case study, through combing and reducing data from various sources. Using a case-oriented strategy, it analysed the historical and cultural background, the initiation, the design process, the target segment and the market communication of each case. By doing so, connections between the cases and patterns shared by the cases have emerged. In the next chapter, cross-case analysis will take a variable-oriented strategy to explicate these connections, patterns, or the keys to their successful projects.

Chapter 7

Rebirth through Nostalgia-driven Design:
Variable-oriented Analyses

7.1
Introduction

This chapter is a continuation of Chapter 6 on the multiple-case study. It takes a variable-oriented strategy to develop the cross-case analysis, through which it eventually answers RQ 1 and RQ 3. Before introducing the structure of this chapter, I would like to stress two important points at the beginning. Firstly, although the cross-case analysis is heavily grounded in the empirical data collected, it is extremely difficult to analyse productively in a purely inductive manner. In fact, during the whole process, new results from the data analysis constantly suggested the need to reframe the challenge and seek for more theoretical guidance from previously unrecognised knowledge domains. Thus, I have been constantly searching for and adding new variables, theories, and analytical frameworks to guide the analysis. Accordingly, this chapter is not strictly linear, but instead follows the actual flow of the analysis, which may bother some readers. Secondly, as I have presented the three cases in a very detailed way in Chapter 6, and Chapter 7 is a direct continuation of it, I will try to not repeat myself too much in this chapter. As a result, although the arguments are made on the basis of evidence, some evidence may not be presented in its full shape in this chapter.

To address RQ 1, **Section 7.2** uses the three cases to further verify the four characteristics of potential phoenix brands initially identified in Chapter 5. Although it slightly deviates from the core of this research, **Section 7.3** analyses an unexpected issue that emerged from the multiple-case study, that is, the nostalgia-driven design processes in the three cases were all strongly driven by passion and intuition, rather than systematic research and validated evidence. The analysis leads to a further reflection and an initial argumentation on the different recommendable design approaches for different situations – under what circumstances would a research-driven (or evidence-based) design approach be necessary or more preferable; and under what circumstances should the designers' passion and intuition be legitimated as being more valuable in leading the design process? The initially identified key challenge of executing a nostalgia-driven design strategy is how to transfer the nostalgic bonds that customers had with a phoenix brand to the newly reborn

phoenix brand and its newly designed revitalising products. However, due to the issues of authenticity emerging from the cross-case analysis, **Section 7.4** reframes the key challenge of nostalgia-driven design to be crafting an aura of authenticity around the phoenix brand. With the assistance of theoretical frameworks of authenticity developed in the fields of cultural heritage study, tourism and consumer research, **Section 7.5** deconstructs the concept of authenticity contextually, and establishes a framework that indicates how customers make authenticity judgements. Under the guidance of this framework, **Sections 7.6**, **7.7** and **7.8** focus on the design, production and communication processes respectively, and analyse how the aura of authenticity of a phoenix brand could be synergistically crafted in these three processes. Finally, further transferring a nostalgic phoenix brand to an authentic brand is proposed and discussed as a subsequent strategy for the phoenix brand's long-term success in **Section 7.9**.

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7.2

The Characteristics of Potential Phoenix Brands

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In Chapter 5, I have initially identified four attributes that indicate a dormant brand may be revitalised as a phoenix brand through a nostalgia-driven design strategy. With the purpose of verifying, extending and generalising such a theory, the successfully revitalised phoenix brands involved in the multiple-case study are therefore also analysed for this purpose.

From the dormant brand's perspective, if 1) a given dormant brand had a relatively long lifespan (e.g. long brand history, some of the obsolete products are still properly working today and have become collectables) and 2) great popularity or dominance in its first life, it would be more likely to be rediscovered and revived. From a customer perspective, if 3) a high proportion of one or more generations used to be heavily and collectively exposed to the brand during their critical periods (e.g. childhood, adolescence and young adulthood), and 4) associate positive experiences or memories with the brand and its obsolete products, this dormant brand is more likely to enjoy increasing non-utilitarian (i.e. sociocultural and hedonic) value in the future. All three of the phoenix brands in the multiple-case study further validate the four features.

First of all, in order to have enough time to form nostalgic memories for people and eventually become an effective memento of nostalgic memory or a cultural icon, a brand and its products need to have a relatively long lifespan before becoming dormant. It is difficult to specify how long exactly the first lifespan has to be for a dormant brand to become a phoenix brand, and it is also a relativistic issue influ-

	Place of Origin / Scope of influence	Dormant Brands' Perspective		Customers' Perspective	
		Brand and product longevity	Dominance / Great popularity before becoming dormant	Heavy exposure during critical periods of one or more generations	Positive/nostalgic memories associated
Forever	Shanghai, China / China mainland	Since 1953	A dominant brand of bicycles from the 1950s to 1990s	Population born from the 1940s to 1980s	Parents' bicycles, first bicycle, childhood, family quality time, etc.
Jopo	Hanko, Finland / Finland	Since 1965	A dominant brand of bicycles from the 1960s to 1970s	Population born from the 1950s to 1970s	A bicycle for the whole family, first bicycle, childhood, family quality time, etc.
TDK	Tokyo, Japan / Global	Since 1935	A dominant brand of cassette tapes from the 1970s to 1990s	Population born from the 1960s to 1980s	Music listening and recording, friends, young love, road trips, etc.
Sarvis	Tampere, Finland / Finland	Since 1921	A dominant brand of plastic household products from the 1960s to 1970s	Population born from the 1950s to 1960s	Childhood, birthday parties, summer picnics

Table 8. The Characteristics of Potential Phoenix Brands

enced by its degree of popularity. Nevertheless, the current cases suggest that over ten years is a promising length. The Forever brand was active and popular in China for approximately forty years before it became dormant. Jopo had a relatively short first lifespan (ten years, 1965-1974) in Finland compared to Forever in China, which may be attributed to the brand owner's deliberate decision to withdraw Jopo from the market before it became completely unpopular and obsolete. Moreover, it is also worth noting that large numbers of original Jopo bicycles that were manufactured in the 1960s and 1970s are still functioning well in the streets of Finnish cities (e.g. Figure 39). In the case of TDK, though it was established in 1935, it became well known among ordinary people in the early 1970s. Thus, as an essential brand

associated with the analogue musical lifestyle, TDK had a lifespan of approximately twenty-five years in the B2C market before its dormancy.

Secondly, in comparison with longevity, the dominance or popularity of the brand in its first life may be more important. All three of the brands enjoyed extremely high popularity in their originating countries or across the world. They became names that everybody knew within different temporal and geographical scopes. After being dormant for some years, they have eventually become cultural icons that represent the zeitgeists of the times when they were dominant.

Thirdly, to a great extent, the longevity and dominance of a dormant brand in its first life can be considered to be important objective conditions for customers to develop a nostalgic bond with the brand. Childhood, adolescence and young adulthood are generally considered by Schindler and Holbrook (2003) as so-called 'critical periods', during which people form cherished early memories and nostalgia-related enduring preferences for products and brands, to which they are frequently and closely exposed. As we can see from the histories of the three phoenix brands, such a heavy brand exposure happened to Chinese, Finnish and global music lovers who grew up in those decades when Forever (1940s-1980s), Jopo (1950s-1970s) and TDK (1960s-1990s) were dominant. They were essential fabrics of their everyday lives back in those critical years.

Figure 39. A 1960s original Jopo that is still in use today
(photo by the author on 14 Dec. 2015 in Helsinki)

Finally, the memories that people associate with a dormant brand are crucial to whether this brand can have a strong nostalgic bond with them, as in the case of Forever to the Chinese, Jopo to the Finns and TDK to music lovers across the world. All these brands carry many positively toned memories (or nostalgic memories), which are nowadays frequently shared by people in various social media platforms or Internet forums.

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7.3

A Design Process
Led by Passion and Intuition

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One of the most impressive findings to emerge from the cross-case analysis is that the nostalgia-driven design processes were greatly led by the designers' passions and intuitions without front-end user studies or marketing research. This surprised me at first because I was expecting to generate a more systematic, objective and evidence-based design approach from the designers' reflections, yet it makes sense after a deeper reflection.

According to the designers' reflections on the initiations and processes of the revitalising projects, they intuitively but accurately grasped the design opportunities, and passionately engaged in the design process. These designers all personally experienced the specific eras when the phoenix brands that they revitalised were extremely popular and formed similar nostalgic bonds with the brands as many others did. For example, Wang clearly expressed a nostalgic childhood memory of sitting on her father's old Forever bicycle, and how much that Forever bicycle meant to her family back then. A similar nostalgic childhood memory was also shared among other members of her design team. She acknowledged that they were just designing the Forever-C bicycles for those who are like themselves. In the case of TDK, O'Connor also mentioned that meeting TDK as a new client immediately brought back the design team's nostalgic memories of using cassette tapes when they were young. Following their intuition, they formed the design hypothesis and started designing the boombox immediately. They used the following user research to verify what they felt was also what the target users felt, and to form a long-term strategic design platform for the future audio products of TDK. Certainly, as a design researcher myself who has been witnessing designers tackling increasingly more complex issues in various unfamiliar fields, I have no doubt about the significance of research, data or evidence in contemporary design practice. Nevertheless, this multiple-case study provoked my further reflections on the role of designers' passion and intuition in comparison with that of data and evidence in a design process.

The contemporary design process is roughly generalised as iterative with four

steps: exploration, creation, reflection and implementation (Stickdorn & Schneider, 2010). Among the four steps, exploration is usually where designers conduct front-end research to gain knowledge about the people that they are designing for, and the context in which the design outcomes are to be used. Meanwhile, by absorbing and interpreting the knowledge empathically, designers try to engage themselves with the users' roles, and discover their latent needs and desires, identify problems or design opportunities, and then create design concepts and make design decisions accordingly. Thus, many user-centred design research methods and tools have been developed to enable designers to rationally collect and analyse data, and think empathically from the users' perspective. Such a research-driven and evidence-based design approach has greatly helped designers to tackle complex issues and create products that fulfil user needs and desires, and therefore it is common to find it being taught in the educational environment and also used in the professional world. However, one thing I find problematic about so-called research-driven design is that it presupposes that the designers and users are two separate groups with a significant social or cultural mismatch, which is perhaps true in most, but not all cases. O'Connor, a senior director-level consulting designer with over fifteen years of professional experience, reflected on the differences between the TDK case and most other design projects he has participated in. A deeper examination of O'Connor's reflection has encouraged me to argue that in the beginning of a design project, many experienced designers actually measure the sociocultural distance between them and the target users, and then decide what type of user research they need to do and at what phase of the project the research should be conducted. If the sociocultural distance is small, and the designers believe they already can be empathic enough to really experience what the users experience, the design process can be led by passion and intuition (or introspection), and then tested by follow-up research (if enough time and funding are available). If the distance is wide, the designers could select a more investigative approach to design on the basis of front-end research.

In addition, the primary types of value that the design outcome is intended to offer may also influence the designers' decision on what process to follow. If high utilitarian value (e.g. efficiency, convenience) is the most important value proposition of a design outcome, a research-driven design approach that informs designers with objective and validated evidence obviously has great advantages. By contrast, when a design outcome is primarily positioned to be a symbolic resource (i.e. sociocultural value) or a 'sexy' emotion stimulator (i.e. hedonic value), relying on user research to lead the design process might not necessarily yield ideal outcomes. In this case, the designers' interpretation of cultural trends, their intrinsic passion and affection, and altruistic motives are perhaps more important than objective and

verified data that tell them what users might need or want in the future.

Finally, the complexity of the design outcome is another dimension that may be considered by the designers. Nowadays, designers often find themselves designing complex interactive systems that involve a large number of stakeholders and new technologies, such as a new integrated system for a country's immigration services. In this case, no designers can promise a good outcome to be created based on only their passion and intuition. However, when designing those culture-oriented and emotionally-charged lifestyle products that fulfil relatively simple functions (e.g. bicycles, glass, clothes), a design process led by extreme passion, intuition and dedication may work better than a systematic research-driven process conducted by highly skilful designers with average (or insufficient) passion and affection for the project.

Considering the sociocultural distance, primary types of value to be offered, and the complexity of the design outcome, a design process driven by passion and intuition revealed in the multiple-case study does not sound surprising any more. Hopefully, a comparison of the following two scenarios can make the point clearer. When a young Finnish designer is designing for a new elderly healthcare service for the Chinese market, it is necessary for the design process to be driven by research; whereas when the same designer is creating new products to revitalise a dormant local toy brand that he and his childhood friends all deeply loved when they were children, the designer's passion and intuition can well play a much more important role than research. Nevertheless, in a passion-driven design process, research is not absolutely eliminated, but occurs in a 'softer' manner instead, as the designers' long-term engagement and observation, day-to-day random accumulation of experiences and cultural sensitivity, and introspection. On the other hand, research-driven design does not mean passion-free.

Clearly, the nostalgia-driven design process is often more likely to be a passion-driven case. A designer without any nostalgic memory of a potential phoenix brand hardly notices the nostalgic bond or the changing and increasing value of this brand in the first place. Although the opportunity may be discovered through user research in a more objective way, designers who share the same nostalgic bond have a better chance to succeed in the revitalisation effort. Cultural nostalgia and cultural nostalgic memories may be seen as the common ground between the designers and the users, thanks to which the sociocultural distance between the designers and the users vanishes. Designers' own nostalgia (as part of the cultural nostalgia shared among the target users) greatly helped them to not only discover the design opportunities, but also generate the design concepts, without having to spend much time on understanding the context, the client, the competitive landscape and the users. In addition, deep engagement and passion or intrinsic motives have been found to be decisive for creativity and innovation (Seelig, 2015). The designers' own nostal-

gic memories and the strong will to preserve those collectively cherished memories ignited great passions in them. As mentioned by O'Connor, their nostalgic memories associated with the TDK brand encouraged all the designers in the team to passionately devote themselves to the project. A similar intrinsic motivation could also be found in the Crossing design team, who even designed the Forever-C products for free in order to have the chance to revitalise a brand that they all have intensive nostalgic feelings for. Such a strong emotional connection between the designers and the client is not something that we can always take for granted. In Jopo's case, Elamo also acknowledged in the interview that Jopo bicycles play a significant role in his childhood memory, and it was this personal nostalgia for Jopo that motivated him to become the Managing Director of Helkama Velox and lead Jopo to flourish again. Apart from boosting the designers' creativity, their passion and affection may also have a strong impact on creating stories about the phoenix brands in order to enhance customer perceptions of authenticity. In addition, the products of these phoenix brands are lifestyle products that fulfil relatively simple functions and aim to provide non-utilitarian benefits. Therefore, such a passion-led and intuition-driven design approach is well-suited to this type of design practice.

7.4
Transferring the Nostalgic Bond by Crafting Authenticity

As introduced in Chapter 2, there are two types of mementos of nostalgic memory in relation to design: *original mementos* and *recreated mementos*. Put in terms of a hypothetical example, when a group of thirtysomethings who went to the same primary school accidentally find their old primary school textbooks in a second-hand bookstore, these textbooks are very likely to make them recall some meaningful nostalgic memories, and therefore can be nostalgically powerful. Such a rediscovery would normally allow them to perceive non-utilitarian types of value in the textbooks, even though the initial utilitarian value (i.e. to gain knowledge from) is no longer important. These textbooks are an example of what I call the original mementos, whereby their increasing value is derived from the nostalgic bond, and the enjoyment and meaningfulness of nostalgic experience. However, what designers have to address when revitalising a dormant brand is how to transfer the nostalgic bond that people have formed with the original mementos (i.e. the potential phoenix brand and its first-life products) to the recreated mementos (i.e. the reborn phoenix brand and its revitalising products).

'Past times that are nostalgically recalled are sacred times' (Belk, 1990, p. 670). Based on his analysis, Belk (ibid., p. 671) claims that 'even though our nostalgic

memories are essentially unreal and imaginary rather than objective and inherent in the objects that inspire them, we nevertheless insist upon the authenticity of these objects, and insist that unauthentic, faked, or forged objects cannot possibly contain the powerful memories of "the real thing". In terms of the importance of authenticity in bringing the past back to the present, many other researchers have also drawn similar conclusions that only authentic objects are able to 'reproduce the past for the future' (Weiner, 1992, p. 9) and offer a chance for people to 'travel back into the past' (Walsh, 2002, p. 101). In this regard, the original mementos are normally perceived to be objects with authenticity, whereas the same authenticity is not naturally or unconditionally granted to the recreated mementos. Perceived authenticity determines whether the experience goal of nostalgia would eventually be evoked at the customers' end while interacting with the design outcomes, or instead be replaced by some undesirable experiences. For example, customers may perceive an ill-designed revitalising product an inauthentic modern pastiche of the original products and one lacking authentic brand essence, so that they may feel it is designed to snatch quick profits by taking advantage of their cherished memories (S. Brown, Kozinets, & Sherry, 2003)

Yet, as with many other experiential concepts that have been discussed in the dissertation, authenticity is not an inherent attribute of an object but the result of a subjective evaluation made by a particular person in a particular context (Belk & Costa, 1998; Cohen, 1988; Grayson & Martinec, 2004; Kozinets, 2001; MacCannell, 1973). Because of the subjectivity of authenticity, it has been argued that 'there is no sense in asking what is the original and what is the copy' (Venkatesh, 1999, p. 157) and 'the distinction between the authentic and the inauthentic can be socially or personally constructed' (Grayson & Martinec, 2004, p. 306). Therefore, authenticity, as a perceived quality or aura of a brand, can be fabricated (Peterson, 1997), rendered (Gilmore & Pine, 2007) or crafted (Beverland, 2005b). Consequently, I consider that perceived authenticity is a prerequisite for the ability of newly designed revitalising products to evoke cultural nostalgic experience and revitalise the potential phoenix brand that they are associated with. At the beginning of the study, I initially identified *how to transfer the nostalgic bond* to be the key challenge in nostalgia-driven design for the purpose of brand revitalisation. However, on the basis of a clearer understanding of the role of authenticity, I reframe the key challenge to be *how to craft an aura of authenticity* around the revitalising project, the newly designed revitalising products, and the phoenix brand.

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7.5

Deconstructing Authenticity Contextually

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Authenticity is a complex multi-layered concept that needs to be analysed contextually. Gradually emerging from the cross-case analysis and continuous literature review, I identified two core aspects of authenticity that directly influence the revitalisation of a phoenix brand – 1) *the genuineness of the artefacts* (i.e. the phoenix brand and its new revitalising products) and 2) *the sincerity of the revitalisers* (i.e. people who are currently behind the brand).

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7.5.1

The Genuineness of the Artefacts

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In order to revitalise a potential phoenix brand through leveraging the nostalgic bond that people have with it, its newly designed revitalising products must be perceived by the public as 'the genuine things' from the brand that they nostalgically remembered. To a great extent, such an authenticity judgement can be understood as an analogue of recognising a long unseen friend. When you encounter someone who claims to be a long-lost friend, you would normally immediately evaluate whether the claim is true or not by examining the features of this person (e.g. appearance, voice, style of conversation and behaviour), and intuitively matching them with the remembered features of the friend in your memory. In this case, all these perceived features of this person are used as sources or evidence to make the authenticity judgement. From which sources or evidence do people perceive this level of authenticity of a phoenix brand? Although the analysis of the cases at hand quickly revealed a lot of clues, they were too fragmentary to be presented systematically. At this point, I went back to the literature again, and secured a theoretical categorisation of authenticity (i.e. indexical and iconic authenticity) from Grayson and Martinec (2004), and also a more practical guideline for authenticity evaluation developed and applied by UNESCO World Heritage Centre. By combing these two, I eventually created a framework for guiding further analysis in detail.

Indexical Authenticity and Iconic Authenticity

Based on Peirce's philosophical work on semiotics (Peirce, 1998), Grayson and Martinec (2004) categorised two types of authenticity – *Indexical Authenticity* and *Iconic Authenticity*. The term 'index' refers to something that is perceived to have a factual and spatio-temporal link with something else. Indexicality distinguishes 'the real thing' from its copies and indices provide people with the phenomenological experience of fact. 'Even if two things appear exactly alike, the authentic

object is the one that is believed to have particularly valued or important physical encounters with the world' (Grayson & Martinec, 2004, p. 298). In contrast, the term 'icon' means something that is perceived as being similar to something else that is indexically authentic. Icons facilitate the phenomenological experience of attending to one's senses. In order to perceive something as an icon, perceivers must have some pre-existing knowledge or expectations, which create a 'composite photograph' in their minds. In other words, iconic authenticity is less about the fact, but more contextually determined by the perceivers' interpretations towards the object's symbolic constructions on the basis of the 'composite photograph' projected to the object. Indexical authenticity and iconic authenticity are not mutually exclusive, which means that 'the perception can sometimes emphasize iconicity more than indexicality and vice versa, every perceived cue has iconic and indexical properties' (p. 298).

UNESCO World Heritage Centre's Guideline for Authenticity Judgement

Apart from the aforementioned twofold categorisation of authenticity, I also secured a more practical guideline for authenticity judgement from relevant documents at the UNESCO World Heritage Centre. In evaluating the authenticity of cultural heritage sites as one of its core tasks, the centre has a well-developed and broadly acknowledged understanding of the criteria that should be applied when judging or perceiving authenticity. The most crucial document on this topic, the *Nara Document on Authenticity*, concludes that 'authenticity judgements may be linked to the worth of a great variety of sources of information. Aspects of these sources may include form and design, materials and substance, use and function, traditions and techniques, location and setting, and spirit and feeling, and other internal and external factors. The use of these sources permits elaboration of the specific artistic, historic, social and scientific dimensions of the cultural heritage being examined' (Larsen, 1995, p. xxiii). When situating these sources of information in the context of a phoenix brand, the statement clearly indicates that the authenticity judgements may be not limited to the design of product style and interaction (i.e. design, materials and substance, use and function), but are also greatly influenced by production (i.e. traditions and techniques, location and setting) and communication (i.e. spirit and feeling). This understanding is also in line with Beverland's definition of authenticity from a perspective of brand management – 'a story that balances industrial (production, distribution and marketing) and rhetorical attributes to project sincerity through the avowal of commitments to traditions (including production methods, product styling, firm values, and/or location), passion for craft and production excellence, and the public disavowal of the role of

modern industrial attributes and commercial motivations' (2005b, p. 1008). In fact, this definition suggests the other parallel aspect of authenticity that is pivotal to the successful revitalisation of a phoenix brand – the sincerity of the revitalisers.

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7.5.2

The Sincerity of the Revitalisers

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Apart from the genuineness of the artefacts, the intention behind the brand revitalisation can also influence the public's perception of its authenticity. Because nostalgic memories are pure, sacred, emotionally valued and cherished, greedily utilising them to primarily pursue a commercial agenda can easily be considered as mercenary and evil exploitation. Therefore, there might be disapproval or even outrage towards the revitalisation. Of course, no matter through which approach it is conducted, brand revitalisation always involves a commercial consideration. However, it is which comes first – the intrinsic, pure and sincere wish to bring back 'an old friend' that everybody knew and had good time with, or money-oriented aspirations – that makes a difference. If the revitalisers' nostalgic passion and intrinsic love for the brand is prominent and appropriately conveyed to the public, the consequent commercial profit is less likely to be labelled immoral, but more likely to be considered a means to revitalise a cultural icon. In addition, honesty, integrity and transparency are also part of this sincerity. Like the genuineness of the artefacts, the sincerity of the revitalisers drives the design and production process, directs the backstage decisions, and then needs to be felt by the public.

The previous literature on authenticity served well as a deductive tool that allowed me to better inductively sort the findings that emerged from the data. The proposed sources of information that people draw on to form the authenticity judgements have shown that authenticity is a multifaceted aura (i.e. genuineness and sincerity) that could possibly be constructed at two levels (i.e. indexical and iconic), and in three integrated processes (i.e. design, production and communication).

Design Process	Form and design, materials and substance, use and function
Production Process	Traditions and techniques, location and setting
Communication Process	Spirit and feeling

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Table 9. The sources of information for authenticity judgements in design, production and communication terms

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Crafting Iconic Authenticity in the Design Process

Drawn from the Nara Document on Authenticity, *'form'*, *'material'*, and *'use'* can be seen as the typical (industrial and interaction) design aspects in creating iconic authenticity. Generally, two principles emerged from the cross-case analysis: *fit* and *boldness*.

After a potential phoenix brand has been dormant for years or even decades, it is necessary for the newly revitalising product(s) to serve as an announcement to the public, as O'Connor mentioned in the TDK case – 'Do you remember me? Do you remember the past that we experienced together? I'm back!' Such an announcement has two purposes. 1) It helps to avoid confusing customers about whether the brand is really the one that they used to love and nostalgically remembered. 2) It reconnects customers with the brand emotionally and culturally, and allows them to more readily transfer meanings from old first-life products to the new revitalising products. Therefore, fit may also be considered to be a principle for promoting iconic authenticity. Moreover, the announcement shall be loud rather than gentle. A bold design style that is distinct from that of its competitors is crucial for making the announcement loud and striking. It helps the phoenix brand effectively attract great public attention, and at the same time enhances the perceived originality and zeitgeist of the phoenix brand.

7.6.1

Fit

Fit, the perceived similarity between the parent brand and the new product, is originally a concept derived from research literature on brand extension. Brand extension is a common branding strategy in which well known, strong and highly valued brand names are used to introduce new products (Aaker & Keller, 1990). By appropriately taking advantage of the equity of established brands, the newly introduced products are more likely to be accepted and perceived by customers as trustable and valuable, with less investment in marketing and communications required. 'Fit' is broadly acknowledged as the most important driver for the success of brand extension (DeiVecchio & Smith, 2005; Völckner & Sattler, 2006). Similarly, a clear affiliation relationship between a new product and its brand is also important in the revitalisation of a phoenix brand. Nevertheless, the difference is that, in the case of brand extension, the brand name is the means to the end of creating successful new products, whereas in the case of brand revitalisation the new products are the

means to the end of achieving the successful rebirth of a phoenix brand. Consequently, achieving fit in phoenix brand revitalisation requires a good understanding of the heritage of the brand, and builds everything new on that basis. This is in line with Pine and Gilmore's (Pine & Gilmore, 2008, p. 36) claim that 'a company's present and future strategic positions build on its past. To remain true to yourself, you must study your heritage and thereby define your innovation and marketing possibilities in the light of your unique origin and subsequent history. You cannot take actions antithetical to your past and think people will view you as authentic, for the easiest way to be perceived as phony is to repudiate your heritage'. The analysis of the three case studies reveals three important considerations for ensuring fit in the design process: *product category relatedness*, *material selection* and *similarity in (industrial and interactive) design style*.

Product Category Relatedness

When using nostalgia-driven design as a strategy to revitalise a potential phoenix brand, the first question regarding fit that needs to be clarified is what type of product should be designed and developed. In general, it is extremely difficult, if not impossible, to revitalise a potential phoenix brand through designing a new offering that has nothing to do with the brand's heritage. This would easily lead customers to perceive the offering as inauthentic, and therefore it would fail to evoke cultural nostalgia and leverage the attached nostalgic bond. On the other hand, blindly sticking to an original product category that is no longer relevant to contemporary life is not a good plan either.

In many cases, the answer to what type of products should be developed for revitalising the brand is so self-evident that designers do not have to always systematically think it through (e.g. in the cases of Forever and Jopo, there was no doubt that the product should be a bicycle). However, the question becomes particularly important when the type of product for which the potential phoenix brand was originally known is barely relevant to contemporary life anymore. For example, TDK was famous for cassette tapes, but unlike bicycles, cassette tapes have not been part of the everyday lives of most people for a long time. Although in 2010 there had been signals of a possible comeback of cassette tapes, like the one vinyl had enjoyed, the timing was not right – it was too early to start producing cassette tapes again. Thus, sticking to those analogue tapes was considered meaningless. O'Connor and his design team therefore answered this question as *something near enough to the core of the brand and also relevant to present life*. But, how might we define the core of a potential phoenix brand and the product categories that are sufficiently close? It is all in people's cultural memory of the brand, which consists of experiences, other people, time, space and a network of artefacts. In the

case of TDK, analogue musical experience and cassette tapes (the physical body of music) in the 1980s form the core of this brand in people's cultural memory across the world. There are also several other products (e.g. boombox, Walkman) around the core as the key enablers of analogue musical experience in the 1980s and 1990s. Among them, the boombox is perhaps the most indelible and expressive one, as the cassette tape was naturally tied to such a player and recorder. Meanwhile, a new boombox designed for digital music listening but with anachronistic experiential qualities could be both nostalgic and relevant to contemporary life. Thus, when answering what product category is near enough to the core of the TDK brand and at the same time relevant to contemporary life, the boombox was a natural solution.

'Real Stuff' Materials

The materials from which the revitalising products are made play a significant role in creating a general aura of authenticity, which in fact is often beyond fit. It has been argued that people tend to perceive products made from more natural or less synthetic materials as authentic (Gilmore & Pine, 2007, 2009). Comparing solid wood with polymer, glass with plastic, and steel with carbon fibre, wood, glass and steel are less artificial, denser, and have a much longer history of use in human societies, and are therefore more likely to create a feeling of authenticity. Such a perceived authenticity conveyed through materials may even frequently lead to irrational evaluation of the performance of products by their users. For example, although both laymen and professional musicians in a blind hearing test failed to tell any difference in acoustic qualities between a polymer guitar and a wooden guitar, the latter are believed to be more authentic, acoustically superior, preferred and therefore more valued (Pedgley & Norman, 2012). Certainly, thanks to the current material technology, many synthetic materials are able to imitate natural authentic materials so well that laypeople cannot distinguish between them. In this case, the selection of materials may not necessarily make a big difference. However, as the information on materials typically needs to be transparent in the communication (e.g. clearly stated in the product description), the use of imitation materials may jeopardise the perception of authenticity among extreme (or expert) users or fans who have more knowledge about the product and brand and higher expectations.

In the three design cases, the selections of materials have also been found to support the creation of an authentic aura around the products and brands. Instead of selecting newer and lighter materials that are able to provide better efficiency and convenience, the designers in the three cases all choose relatively older and heavier ones to build the products. This tendency is particularly obvious in the TDK case, in which the designers selected solid wood for the boombox handle, thick aluminium for the frame and knobs, piano black gloss acrylic for the front panel (which

	'Real Stuff' Materials
Forever-C	• High-tensile steel for the frame • Genuine leather for the grips and saddle (Peishan advanced version)
Jopo 2nd	• High-tensile steel for the frame and front fork
TDK	• Solid wood for the handle • Thick aluminium for the frame and knobs • Piano black gloss acrylic for the front panel • Genuine leather for the shoulder strap • Brass for its buckles

Table 10. The selections of materials in the three design cases

actually offers a glass-like effect), genuine leather for the shoulder strap and brass for its buckles. In the interview with O'Connor, he called these materials 'real stuff'. Similarly, 'real stuff' – high-tensile steel – was selected as the preferred material for building Forever-C and Jopo bicycles. Meanwhile, the selections of materials were also clearly influenced by the repositioning of these phoenix brands, though the designers did not use such marketing terms to articulate this consideration. To a great extent, these successful phoenix brands were all revitalised as what I would call ***affordable premium brands offering culture-oriented lifestyle products***. Although they were all highly functional and practical, and represented the best utilitarian value in their first lives, it was the nostalgic bonds that lifted the non-utilitarian types of value (i.e. mainly sociocultural and hedonic value, and altruistic value in some cases) that provided the basis for their revitalisation.

Similarity in Design Style

In Chapter 3 (3.4.2), I discussed the designed cues of nostalgic memory in the more general context of design. This examination of fit in form and use has significant connections with that part of the discussion. The newly designed revitalising products can be seen as a combination of appropriately designed multi-sensory and interactive cues of nostalgic memory associated with the brand. In this sense, similarity in design style can be understood as the common sensory and interactive features shared between the remembered classic first-life products of the brand and its new revitalising products. Therefore, ***the fit in form*** (i.e. ***sensory similarity)*** and ***the fit in use*** (i.e. ***interactive similarity)*** are perhaps the most important considerations in ensuring iconic authenticity.

	Sensory Similarity					Interactive Similarity
	Visual	Tactile	Auditory	Olfactory	Gustatory	Operational
Forever-C	√					√
Jopo 2nd	√					√
TDK	√	√	√			√

Table 11. The design considerations of sensory similarity and interactive similarity in the three cases

Firstly, for the sensory similarity, as can be seen in all three cases, the nostalgia-driven design processes typically began with the deconstruction of the phoenix brands' best-known first-life product models. Then, the designers made decisions on what elements should be retained as the signature for sufficient familiarity (e.g. the geometry of frame in the case of both Forever and Jopo), what were the flawed or unnecessary elements that should be altered (e.g. the handlebar of the second-generation Jopo) or discarded (e.g. the complex physical control panels of the 1980s boomboxes), and what new elements should be added in order to ensure sufficient novelty and relevance to contemporary lifestyles (e.g. the digital touch screen of the new TDK boomboxes). However, as expected, this part of design practice was fundamentally vision-oriented, and other sensory modalities were not given enough deliberate consideration. On the other hand, as multisensory design cues of nostalgic memory are still uncommon in real-life cases, the systematic integration of sensory inputs other than visual ones may well evoke pleasant surprises. For example, in the TDK case, the special smell of the printed lyrics insert of a cassette tape could have been embedded in the package and user manual for an unexpected nostalgic evocation of opening a brand new cassette tape.

Interestingly, operational interaction, especially bodily interaction, was considered in all the cases. For example, in both of the bicycle cases, designers recognised the importance of retaining the riding position or riding geometry as one of the signatures inherited from their first-life products. Unlike digital products, the bicycle is a type of mechanical product and its interactive style is directly determined by its visual style, or more precisely, the product structure that is directly visible. Thus, such a similarity in bodily interaction may not necessarily be deliberately designed from an angle of interaction design, but rather naturally enabled by the visual (or

structural) similarity. Nevertheless, with the fast-growing interest in tangible and bodily interaction in the HCI area, more interactive computing products that are capable of evoking nostalgic experience through bodily interaction may be developed in the future.

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7.6.2

Boldness

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Boldness in style is also important for a potential phoenix brand's revitalisation. In order to ensure that the announcement of 'I am back!' is noticed by the public, the revitalising products shall have a distinctive, highly expressive or bold style. It allows the phoenix brand to surprise the customers, and attract great attention. Unlike those constantly active brands or new brands whose boldness usually requires highly novel design styles, the boldness of a phoenix brand is often more likely to be achieved through heavily sticking to its original style but combining it with necessary novel elements.

Taking design as strategic styling in particular, Person and colleagues (2007) suggest three major goals of product design that generally contribute to branding and enhance attractiveness in a commercial setting: 1) ***attention drawing***, 2) ***establishing recognition***, and 3) the ***creation of symbolic meaning***. Firstly, attention is 'the selective focus of mental capacity on a particular object' (ibid., p. 904). A product that is able to attract attention gets noticed in a crowded market, surprises the consumers and encourages them to approach it and to have more and closer interactions. Secondly, establishing recognition refers to a preferable situation in which a new product contains enough identifiable design features associated with the brand as experienced through previous products. It ensures that the customers will transfer the brand equity to the new products. Thirdly, symbolic meanings are the personal, social and cultural meanings that people associate with the brand and its products (ibid.). The three goals of styling are also applicable to nostalgia-driven design for brand revitalisation. The goals of establishing recognition and recreating symbolic meaning may well be fulfilled by the principle of fit. In contrast, boldness serves as a way to draw attention.

In general, it has been argued that novel and unexpected information is able to capture one's attention more easily (Lynch & Srull, 1982). Its implication for design has been that forming a new product whose style deviates from its previous products can be an effective approach to draw more attention from consumers (Person, Schoormans, Snelders, & Karjalainen, 2008; Person & Snelders, 2009; Person et al., 2007). At the same time, however, too much deviation jeopardises established brand recognition, the transfer of brand equity and symbolic meaning. As a result, when

designing new products for a well-established brand, one of the key challenges is to achieve a good balance in the contradiction between style deviation and consistency. Interestingly, the two parts of this contradiction appear to be rather compatible in the context of nostalgia-driven design for brand revitalisation. Although it is rare to see a 1960s Trabant car today, a 60-year-old former GDR citizen may be very familiar with it; a Trabant will draw great attention because this car's style is so different from what can be seen on today's streets. Similarly, when visiting a vintage American car festival with hundreds of cars manufactured in the 1960s, few would think that if we moved this festival back to 1960s New York City, it would just be an ordinary car park.

In contrast with a currently successful brand that has been continuously active and prosperous, a potential phoenix brand has normally been dormant for years or decades. As part of the phoenix brand's 'composite photograph' remembered by the public, its long unseen signature design style is usually highly recognisable because it was once prevalent, and at the same time very different from that of its current competitors due to constant changes. Thus, being bold in this case does not mean being disruptively novel or unprecedented in comparison with the current competitive brands and products, but rather daring to selectively bring back the old design elements that are highly distinctive, nostalgically recognisable, and symbolically connected with the relevant bygone zeitgeist.

This is why Forever-C was not styled to be futuristically novel as proposed by the European designers, but instead to be largely consistent with its design legacy, which was established in the 1950s and remained dominant until China's economic revolution in the 1990s. It is the design legacy that has allowed Forever-C to be highly recognisable and arresting in a market full of competitive brands whose attention-drawing goal is mostly achieved through novel design styles. In a similar manner, the second-generation Jopo successfully attracted the attention of the Finnish public by sticking to its anachronistic 1960s design signature (e.g. frame geometry, colourfulness, single gear) that had been unseen in the mainstream market for decades. As in these two preceding cases, TDK's huge size and incredibly heavy digital boomboxes are also unexpected and striking throwbacks to the 1980s, being very different from its current competitors' small, light, and highly portable products.

However, inheriting heritage does not automatically mean rejecting progress. In fact, a successful outcome of cultural nostalgia-driven design should not be an identical reproduction of an anachronistic product. As I have argued in Chapter 2, the role of design in nostalgia waves is to create a synthesis that preserves the merits of thesis (i.e. the progress that earlier changes brought) and antithesis (i.e. the valuable aspects that we lost along with the changes), and goes beyond both of them. Phoenix brands and their obsolete products may be full of romance, cultural sym-

bolic meaning, but there has been significant progress in terms of technology and the understanding of human factors, which creates new room for improvement on the premise of iconic authenticity enhancement. For example, the designers of both Forever C and second-generation Jopo tried to improve the usability flaws that the original products had. In the case of TDK, the messy control panels of the 1980s boomboxes are replaced by clean and minimalistic digital touchscreens. These new design elements increase the perceived utilitarian value, though it is not the most important type of value that phoenix brands should target. Meanwhile, they also promote the perception of originality, which in another way enhances the perception of authenticity.

<div align="center">7.7</div>

Crafting Iconic and Indexical Authenticity in the Production Process

Although designers often do not have full control of the manufacturing process, how ('***traditions and techniques***') and where ('***location and setting***') a product is produced may also significantly influence the judgement of indexical authenticity. Considering nostalgia-driven design from the perspective of holistic strategy, designers could and should also exert influence on some key aspects in the production process to support it. Emerging from the cross-case analysis, three aspects may require special attention from strategic designers and managers.

<div align="center">7.7.1</div>

Commitment to Quality

In his research into brand authenticity, Beverland (2005a, 2005b, 2009) argued that production excellence is extremely important for crafting brand authenticity, though it does not seem to be a branding issue in a conventional sense. As can be seen from the case descriptions, excellent product quality was one of the reasons that these phoenix brands came to dominate certain local or global markets and became well known. Many of their products produced decades ago are still functioning today and people generally love well-made things. Forever, Jopo and TDK all represented the highest product quality among their competitors during their old glorious times in China, Finland and worldwide. Thus, excellence in quality is also a crucial aspect in the public's 'composite photograph' that influences the perception of iconic authenticity. When these phoenix brands come back to life again in the 21st century, therefore, reliable and excellent product quality is expected. As I mentioned before, I identify all three of these phoenix brands as affordable

premium brands offering culture-oriented lifestyle products. They do not compete in price and convenience, but in uniqueness and pureness, and the representation of local culture and zeitgeist. Thus, in comparison with building new revitalising products economically, and making them cheap options, it makes more sense to exquisitely craft them to a high standard.

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7.7.2

Made in the Place of Origin

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If a phoenix brand has its scope of nostalgic influence within a certain region or country (e.g. Forever within China, Jopo within Finland), producing its products at the place where the brand was originally founded can be particularly effective for crafting its authenticity. In our highly globalised world, it is very common that branded products are manufactured at locations far from the brand's origins (Roth & Romeo, 1992). Moving production to developing countries where cheaper labour is available has been a typical way to minimise manufacturing cost, so that the prices of products can be kept low. Who does not want to have good products to be sold at low prices, especially for those brands and products perceived to provide high utilitarian value (e.g. HP laptops)? However, for those brands with or targeting at high socio-cultural value, where their products are made may strongly influence the perceived authenticity and value. In an experiment, for example, participants were asked to evaluate the authenticity and value of two identical genuine Louis Vuitton travel bags – they were told that one was made in the original factory in Paris, and the other in San Dimas, California. The results showed that the

Figure 40. Jopo - Handmade in Finland with style and smile (Photo by the author at the Helkama factory in Hanko, Finland on 8 Nov 2013)

former was perceived to be more authentic and therefore more valuable than the latter (Newman & Dhar, 2014).

Cultural nostalgia evoked by phoenix brands is not only about past times but also often related to local history and culture. A phoenix brand's physical connections to its place of origin play a significant role in people's authenticity perceptions and in turn influence the evocation of cultural nostalgic experience. Such an issue has been remarkable in the case of Jopo. After Jopo's rebirth in the early 2000s, Helkama Velox outsourced the manufacture of Jopo bicycles to Taiwanese bicycle manufacturers in order to lower the cost. Autero frankly stated in the interview that he so drastically disagreed with this decision that he was almost forced to resign. Though he explained that the main reason for his disapproval was the decreased production quality, such statements as '*Jopo must be Finnish! … Even if someone else were to make Jopo here in Finland, that's still much better than making Jopo in Taiwan*' clearly expressed his concern that 'made in Taiwan' would jeopardise Jopo's brand authenticity. Luckily, Helkama Velox moved the production of all Jopo bicycles back to Finland in 2010. From then on, all Jopo frames have been forged and printed, and every single Jopo bicycle has been assembled in Helkama Velox's factory in Hanko, Finland, where the first Jopo bicycle was originally designed and produced in 1965. In the following interviews with Jopo users and collectors, the participants showed that they do consider Jopo bicycles made in Finland more authentic and nostalgic. 'Made in Hanko Finland' allows every recreated Jopo bicycle to genuinely share the essence of this brand and to be a legitimate memento of the cultural nostalgic memory. In addition, many Finnish Jopo fans interviewed also expressed that manufacturing the bicycles in Finland assured them that Jopo (or Helkama Velox) is a socially responsible brand. Instead of shutting down its local factories to lower the production cost, the company has endeavoured to increase local job opportunities and contributes more to the local economy when the country's economic situation is not very good. Some also mentioned that after Nokia was gone, they felt an urgent desire to have other Finnish brands to be proud of. Though Jopo has a small business volume, it is 100% Finnish. It is clear that some of the Jopo fans ascribe altruistic value to Jopo because it is 'Made in Finland'.

7.7.3

Handcrafted

Not only are all Jopo bicycles made at the original factory in Hanko, they are also handmade by skilful Finnish craftsmen, which has ensured that the Jopo brand is even more deeply rooted in Finnish culture. Only a few decades after the Industrial Revolution, Ruskin already expressed his authenticity concerns regarding machin-

Figure 41. A young Finnish local worker assembling a Jopo bicycle (Photo by the author at the Helkama factory in Hanko, Finland on 8 Nov 2013)

ery – 'the machine … could make only inauthentic things, dead things' (Trilling, 1972, p. 127). Though such an opinion popularised in the Arts and Crafts movement had its historical limitations in understanding the value of machinery, the belief that machine-made products have no soul and therefore lack authenticity seems to be still well accepted by people today. For all those so-called lifestyle products invented before highly automatic machinery (or the second Industrial Revolution), such as chocolate, beer, jewellery, watches, porcelain, bags, shoes, outfits, and furniture, being made by human hands using traditional procedures and techniques has been a crucial way to enhance their perceived uniqueness and the authenticity of their brands. Nostalgic memory is often an idealised illusion, and so is the belief that iconic brands' classic products were handmade in the past, even if that was only several decades ago. Nevertheless, involving skilful human hands in the production process has been valued for the sake of authenticity enhancement, and therefore helps to convince people of the authenticity of a phoenix brand.

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7.8

Crafting Authenticity in the Communication Process

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Looking at nostalgia-driven design from a strategic level, communication is an integrated part of the whole process, and particularly conveys the '***spirit and feeling***'. It allows what happened backstage to be conveyed to the public. The public's perception of the authenticity of a phoenix brand requires a holistic communication approach, which is customer-centric, with every touchpoint of the customer jour-

ney under consideration, and multichannel, but conveys a consistent brand message to the public. Traditionally, communication may not be understood as part of the designers' job in a narrow sense, but only as the marketers' duty. To a great extent, however, strategic design and marketing can be unified as a continuous process or two intertwined aspects under the overarching experience-driven and customer-centric mindset. Although design researchers and marketing (or consumer) researchers may have different perspectives and terminologies, they both study customers' experiences, emotions and value perception, which is evidenced by the literature of design and emotion, experience-driven design, experiential marketing, and customer-centric marketing. Besides, in order to ensure a design strategy functions effectively, designers often have to directly or indirectly contribute to brand communication. Although the data collected from the current cases did not show that the designers made evidence-based decisions about communication, they either did it right intuitively or their colleagues in marketing made appropriate decisions that were consistent with the design strategy. Nonetheless, an integrated communication plan that clarifies two crucial aspects – 1) the brand message and 2) the channels – in the early phase of a phoenix brand's revitalisation would further increase the chance of success.

7.8.1

The Brand Message

Drawn from the case studies, the brand messages of these successful phoenix brands share three common themes: 1) the associated cultural nostalgic memories, 2) the revitalisers' (i.e. the designers, brand managers and owners) intrinsic love and nostalgic passion for the brands, and 3) respect for the (idealised) traditions and moral principles. Stressing these three themes in the communication ensured that the customers focus on the non-utilitarian value of these phoenix brands, and allowed
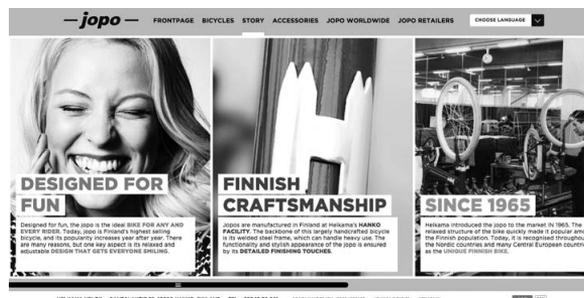

Figure 42. A screenshot of Jopo's website page (http://www.jopobikes.com/the-jopo-story/)

these brands to occupy the ideal positions in the customers' mind. Although nostalgic memory is normally idealised and often contains emotionally charged false information, the truthfulness of the second and third themes is crucial, because they represent the present state of the brand viewed without the 'rosy' lenses of nostalgia. Forging a preferred brand image with false information about what goes on behind the scenes would jeopardise authenticity. Therefore, in the three cases of successful phoenix brands, their brand messages were formed by what really happened in the design and production processes. The role of communication is to make sure that the most emotive, meaningful and appealing aspects are appreciated by the public.

The Associated Cultural Nostalgic Memories

First of all, it is meaningless to create the value proposition of a phoenix brand around technology and functionality that provide better efficiency or utilitarian benefits for customers. The competition at that point has always been very intensive, and phoenix brands in most cases do not have an advantage compared with the dominant and new brands in the same category. On the contrary, customers are more likely to value the phoenix brands as something meaningful in their personal memories as well as the cultural memories of the communities that they belong to. When most things in their lives have gone or changed significantly, phoenix brands – as something returned to and reunited with the customers – serve as important resources for social and cultural benefits (e.g. cultural identity reconstruction, self-expression, and social connectedness enhancement) and hedonic enjoyment (e.g. nostalgic aesthetic preference and positive nostalgic experience). Therefore, the most important information to convey in the brand message should be the cultural nostalgic memory that the phoenix brand is associated with – do you remember the time when the brand was around? Theses narratives often nostalgically resonate with millions (or even hundreds of millions) of people. For example, in the promotional video *'TDK Life on Record: Chronicles'* (TDK, 2010), the functionality, technology used and even the new products themselves were not mentioned at all. Instead, TDK invited The Strokes (an American rock band) to share their nostalgic memories associated with cassette tapes (e.g. stories about how they fell in love with music and how they listened to, recorded and curated music with cassette tapes). All the members of the band were born in the late 1970s and early 1980s, and their nostalgic memories associated with TDK can deeply resonate with hundreds of millions who also loved music when TDK was a beloved brand representing the body of music. Clearly communicating this information ensured that potential consumers would focus on the most valuable and unique asset of the TDK brand – the cultural nostalgic memory shared in everyone's mind.

The Intrinsic Love and Nostalgic Passion of the Revitalisers

The second major finding is the revitaliser's intrinsic motives for the brand revitalisation. More specifically, instead of utilising cultural nostalgic memory to enable commercial profit exploitation, revitalising a phoenix brand is primarily done for the sake of the cultural nostalgic memory shared by the revitalisers and everyone who experienced the good old days. This ensures that customers perceive that the revitalisers are sincere.

The revitalisers are typically the designers, managers and brand owners who initiated and are devoted to carrying out the brand revitalising projects. As revealed by the cases (i.e. Forever and Jopo), when a potential phoenix brand is still dormant, its company often cannot allocate an adequate budget for the revitalisation, because economic conditions do not allow it. Therefore, the brand revitalising projects often have to be driven by the revitalisers' intrinsic passion and love for the brands. Sometimes, they even need to sacrifice their own resources to enable successful revitalisation. Interestingly, it is such obsessiveness and seemingly irrational risk-taking behaviour that legitimises the return of phoenix brands with high authenticity. It rendered everything they did to revitalise this brand more than a matter of mere commerce. Despite the fact that every brand revitalisation inevitably involves the pursuit of commercial opportunities, the stories about the revitalisers' nostalgia, love, passion and 'stupid' advocacy of the phoenix brands guide the customers to focus on the sincere and intrinsic motives behind the revitalisations.

The Respect for Traditions and Moral Principles

Finally, it is important to let the customers know that the phoenix brand is still 'stupidly' insisting on perpetuating some old-fashioned but valued traditions and moral principles that made the brand successful in the first place. Phoenix brands typically have relatively long histories and traditions. For those who personally experienced their illustrious history, their return may be seen as analogous to that of a long-lost friend. The recognition of the old friend may mainly rely on the continuity of its traditional signature style, but the renewal of the friendship needs to be confirmed by customers sensing that those positively remembered traditions remain unchanged. These traditions are 'behind-the-scenes' behaviours that downplay the commercial motives and increase the perceived altruistic value of the brand (e.g. products being handmade by local craftsmen with traditional techniques, the passion for perfection, supporting local work, caring about labourers' wellbeing). It is worth noting that, as nostalgic memories, these positively remembered qualities were not necessarily all true in the past. In fact, it is probably more common that some are idealised impressions that customers formed about the phoenix brands in those 'good old days', when the world was not so globalised and so manipulated by other, more mercenary brands. Despite their consistent business suc-

cess, the image of many large international brands has been associated with some negative characteristics in recent years (Beverland, 2009). For instance, they no longer offer products that last long but seduce people to consume more; they use cheaper materials to construct their products; and they close down local businesses and outsource manufacture to poor countries where workers are heavily exploited. Thus, the traditions (or 'stupidities' or 'insistences') of phoenix brands not only embody their brand essence, the zeitgeists and subcultures that they are connected to, but also better differentiate them from many international large brands and create an altruistic 'halo' beyond cultural nostalgia that increasingly appeals to consumers.

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7.8.2

The Channels

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With a clear and consistent brand message, the other crucial aspect of communication is to identify through which channels the brand message shall be spread. Traditionally, companies promote their products and communicate their brand messages mainly through direct marketing, such as television and magazine advertising, catalogue distribution and sales promotion. However, as indicated by the case studies, two channels turned out to be exceptionally important for the revitalisation of these brands: 1) online platforms, especially ***social media*** that require extremely low investment, and 2) the elaborately designed and constructed ***revitalising products*** themselves.

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Social Media

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Social media represents a broad range of Internet-based platforms, forums and applications (e.g. Facebook, Twitter, YouTube) 'that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of User Generated Content' (Kaplan & Haenlein, 2010, p. 61). Along with the ubiquitous Internet and the prevalence of digital devices, social media allows people to constantly connect with each other, create multimedia content, view, comment and share them. Using social media platforms is already part of everyday life. For example, there were 1.04 billion daily active Facebook users on average in December 2015 (Facebook, 2016). Consequently, social media has provided a fundamentally new and more effective way for brands to communicate with their customers (Booth & Matic, 2011). As the multiple-case study demonstrates, social media has served as the main communication channel for all of them. Forever's only investment in communication was introducing Forever-C bicycles at the 20th *China International Bicycle and Motor Fair*. Although the launch of Forever-C was still pending at the time, the news of Forever's return had already been spread by tens

of millions of nostalgic Chinese, including many celebrities, across almost all popular social networking platforms (e.g. Douban and Weibo). Similarly, using a more deliberate plan, Jopo has utilised Facebook as the main channel to communicate with its adherents, and the Managing Director of Helkama Velox himself maintains the company's Facebook page. TDK used YouTube to share its promotional videos that tell nostalgic stories about being teenage music lovers in the 1980s and 1990s. In addition, the design-oriented reports on how TDK's new products were designed by Ziba designers with deep nostalgic passion and love for the brand were also shared among the designers' social networks. As the multiple-case studies have shown, there are three main reasons for phoenix brands to use social media as the primary channel for communication.

First of all, it is inexpensive. Moneywise, the revitalisers of a phoenix brand can be seen as entrepreneurs who are establishing a new start-up company. As discussed, the available budgets for revitalising phoenix brands (e.g. Forever and Jopo) are often inadequate, which forces them to use low-cost solutions for communication. Luckily, social media has provided such a means. Moreover, communicating through social media is not only inexpensive in terms of monetary investment, but also very easy to learn and manage. After fierce competition among social networking platforms, the survivors are typically user-friendly and have well-designed cross-device solutions.

Secondly, social media is interactive and effective. It not only enables companies to communicate with their customers directly, diversely and interactively, but also enables fans of the brand to connect and share practical and affective information with each other (Mangold & Faulds, 2009). In this sense, customers or fans of a brand have been granted much greater power to co-create the stories, meaning and sociocultural value of a brand, and consequently co-position it. The reborn phoenix brands that have strong cultural nostalgic connections with a particular country, a generation, or a society, have an innate advantage in utilising social media. As I have argued in Chapter 1, the pleasure of nostalgia comes mainly from sharing or anticipated sharing. Therefore, there is a strong tendency for a nostalgic public to create and share their nostalgic memories, in which the brand and its products served as the symbol of the bygone time. These days, such nostalgic stories are often created in vivid forms, such as text, images and videos, and are typically very personal, emotionally laden and at the same time are able to resonate with large audiences. One such nostalgically touching post can potentially trigger numerous reposts, and those who are touched by it might also share their own nostalgic narratives. In addition, such online cultural nostalgic events almost always attract great attention from more conventional media (e.g. radio, TV, newspapers and magazines) and therefore enjoy free publicity.

Thirdly, the low-cost and grassroots nature of social media eventually enhances

perceived brand authenticity. Perhaps this sounds paradoxical, but brands that spend huge funds on marketing and sponsorship deals have started to be considered lacking in authenticity (Beverland, 2009). Consumers attribute the high prices of their products and services to their intensive investment in marketing. In comparison, brands that do no (obvious and direct) marketing and branding, but are keen on perfecting the design and production of their offerings, improving employees' wellbeing and serving the society, are more likely to be considered authentic (Beverland, 2009). Phoenix brands use social media to communicate, invest as little as possible in branding and marketing, leverage the cultural nostalgic memories rooted in society, let the customers or fans co-author the stories and their meanings. Even if a phoenix brand is able to (or actually does) invest significantly in marketing, it should avoid being perceived as such a brand. To a great extent, extravagant marketing is often seen as a sign of greedily exploiting the brand and its associated cultural nostalgic memory. Moreover, unlike over-polished brand stories created by professional advertisers, the fans' personal stories as online word-of-mouth are more likely to reveal the cultural meaning behind the brand, and unite the brand and its fans in the same community.

The Revitalising Products Themselves

A phoenix brand's commitment to quality and premium craftsmanship can be directly perceived through its products, and thus the revitalising products themselves should be considered another important communication channel for phoenix brands to ensure perceived authenticity. 'At the end of the day, your brand is only as good as the products and services behind it. As research shows, ultimately consumers connect directly with products, indirectly with brands' (Beverland, 2009, pp. 180-181). Once physical interactions with branded products and services occur, customers can be very sensitive to the message these artefacts and processes convey about the brand. In the same sense, customers naturally judge the authenticity of a phoenix brand by perceiving the quality of design and manufacture of its revitalising products. The products and services eventually embody the brand message and allow customers to directly experience the cultural nostalgia associated with the phoenix brand, the revitalisers' intrinsic love, passion, commitment to quality, and the traditions and principles that the brand promotes. Although planned brand communication plays a pivotal role in crafting the authenticity of a phoenix brand, authenticity definitely cannot be achieved solely through communication. Everything that a phoenix brand claims in creating its authentic aura, but which fails to be directly sensed by customers during their interactions with its offerings, would eventually undermine its authenticity. This leads the discussion of crafting authenticity in communication back to the design and production processes.

7.9

Sustaining Revitalised Phoenix Brands

While the attraction of cultural nostalgia is potent, it may be fleeting, and thus a long-term strategy is needed to sustain the revitalisation. Regarding this, the three phoenix brands showed different levels of planning and achievement. Forever-C did not have a very clear plan for its future development. For TDK, Ziba developed a design language system that provides the essential (visual and interactive) design cues that future TDK audio products should always contain and follow. Jopo, as a phoenix brand that has flourished again for over ten years, developed the most holistic strategy to sustain its second life. In short, the Jopo brand has become an authentic Finnish icon. As a phoenix brand, Jopo brings a warm nostalgic feeling to older-generation Finns who literally lived during the golden days of Jopo, which has been the basis for its revitalisation. As an authentic Finnish icon, Jopo appeals to a broader audience, including those who obviously do not share the cultural nostalgic memory but seek authenticity (i.e. Finnish young creative class, youngsters, foreign residents in Finland and tourists). As discussed, perceived authenticity is a prerequisite of nostalgic experience, because it is the key to transforming the nostalgic bond and the success of phoenix brand revitalisation. Therefore, every revitalised phoenix brand has the potential to build its long-term strategy based on further enhancing the aura of authenticity perceived by a broader audience.

Almost everything that is capable of evoking local cultural nostalgia – not just phoenix brands – has a high chance to be perceived as an object with high authenticity by the broader audience. In addition to the cases presented in this chapter, let us also have another look at the cases presented in Chapter 2 for a generalisation – *Ampelmann,* which evokes cultural nostalgia for East Germany, *Nengmao's* products that make the post-80s Chinese nostalgic, and London's *new Routemaster* bus that brings nostalgic memories to Londoners. All of them actually appeared to have great attraction for people who do not experience true nostalgia from interacting with them, but desire the experience of authenticity that they bring. Authenticity has been identified to be a particularly strong appeal to the newly formed creative class (Boyle, 2003; Florida, 2002; Ray & Anderson, 2000). In this regard, the appeal of authenticity explains well why the young creative class typically emerged as the most active and passionate customers of these phoenix brands. It is the aura of authenticity around these phoenix brands that charms them, even though most of them were too young to have any direct memories of those old glory days and to experience real nostalgia in the present. In addition, seeking for authenticity has also long been ascertained as a major interest for tourists (L. Brown, 2013; Cohen, 1988; MacCannell, 1973; Ramkissoon & Uysal, 2014; Wang, 1999). When visiting

a different culture, experiencing unique things (e.g. scenery, food, artefacts, and stories) is one of the most meaningful activities. A locally made (or even hand-made) product, with an exotic and anachronistic style, from a brand that locals attach many nostalgic stories to, would normally be considered one of such unique things. Accordingly, for instance, Trabant driving tours in Berlin and Jopo riding tours in Helsinki are becoming increasingly popular among tourists. If such products are not too big and too expensive, they are very likely to become great souvenirs for tourists to bring home (e.g. Ampelmann's products). Thus, a successful cultural nostalgic design is attractive not only to people who experience true nostalgia from it, but also to those who have no true nostalgic connection, but seek authenticity from it.

It may be extremely difficult for a phoenix brand to become a large brand and to dominate the local or global market again as it did in its first life. But, considering its strength in authenticity, building a smaller but authentic brand can be a more reasonable and promising pathway to go. On the premise that the products fulfil their basic functions well, the things that an authentic phoenix brand provides are more about the non-utilitarian benefits, the experience of that bygone and positively remembered slower, simpler and more analogue lifestyle, and the construction and expression of cultural identity. To transform a phoenix brand to an authentic brand for a long-term success requires a series of unique balances or synthesis between commercialisation and intrinsic passion (in motives), novelty and familiarity (in design), the front stage and back stage (in management), and local roots and globalisation (in communication and distribution). This is in line with the conclusion that Beverland (2009, p. 180) made about building an authentic brand:

> *Authentic brands are laden with contradictions – they are old and forever relevant, up to date but timeless, they are commercially successful yet deny their commercial prowess and motives, and sometimes even committed to overthrowing capitalism while also stressing bottom line performance. The managers of authentic brands need to become experts at managing these tensions. They must accept that muddling through is often all there is, that the best plans will often be wrong or incomplete, and that messiness often provides the basis for innovation. Instead of masking inconsistency, they must deal with the many paradoxes associated with authentic brands and effectively operate two parallel systems – one focused externally on communicating a sincere story about the brand, one focused behind the scenes counterbalancing relevancy with timelessness.*

7.10
Conclusion

As a continuation of the last chapter, this chapter has developed the cross-case analysis under a variable-oriented analytical strategy. By doing so, it has verified the initial findings regarding RQ 1 and answered RQ 3.

Firstly, although the revitalisers' own nostalgic memories play a significant role in understanding the value change of a potential phoenix brand, clarifying what characteristics phoenix brands have in common would help them to more consciously and systematically identify the next phoenix brand that is still in dormancy. The common characteristics of the three brands (i.e. Forever, Jopo, TDK) reinforced the initial findings discussed in Chapter 5. A dormant brand is more likely to enjoy a special nostalgic bond with people, increasing sociocultural and hedonic value, and therefore to be revitalised through cultural nostalgia-driven design, if it has the following four characteristics:

From the dormant brand's perspective:
1) It had a relatively long lifespan in its first life (e.g. long brand history, some of the obsolete products are still in use today and have become collectables).
2) It had great popularity or dominance in its first life.

From the customers' perspective:
3) A high proportion of one or more user generations were heavily and collectively exposed to the brand during their critical periods (e.g. childhood, adolescence and young adulthood)
4) The majority of them associate positive memories with the brand and its first-life products.

Secondly, when we know which dormant brands may be revitalised through nostalgia-driven design, the question of how inevitably comes to the fore. Even though the designers might not explicitly articulate this point, the most crucial challenge for the execution of a nostalgia-driven design strategy is to transfer the nostalgic bond that people have with the original mementos to the recreated mementos. Based on a deep understanding of the relationship between the nostalgic bond and perceived authenticity, I eventually reframed the challenge of transferring the nostalgic bond to crafting the aura of authenticity around the revitalising project, the new products, and the phoenix brand.

In the current research context, two core aspects of authenticity have emerged from the cross-case analysis. The first is the genuineness of the phoenix brand and

its newly designed revitalising products. The perception of this aspect assures the public that the phoenix brand and its products are still 'the real things' that can carry genuine cultural nostalgic memories. The other core aspect is the sincerity of the people behind the current brand revitalisation. This aspect downplays the commercial agenda of brand revitalisation, and highlights the revitalisers' intrinsic motives for bringing the brand back to life – their nostalgic memory, passion and love for the brand shared with the public. Public perception of such sincerity encourages them to believe that their cherished memories associated with the brand are not exploited for the sake of commercial profit primarily or alone. Instead, the phoenix brand's comeback is more like a long-lost friend from the good old days reuniting with them.

In two of the three cases (i.e. Forever and TDK), the designers were the ones who took the strategic lead, initiating and conducting the brand revitalisation projects. However, the successes of these projects required much broader strategic planning and execution beyond pure industrial and interaction design. Thus, a narrow focus on the design process alone would not prevent me from drawing a full picture of the drivers and principles leading to their successes. Accordingly, I analysed how authenticity was crafted in the ***design process*** (focusing on form, material and use), ***production process*** (focusing on traditions, techniques, location and setting) and ***communication process*** (focusing on spirit and feeling). Even though the designers might not directly make decisions in the production and communication processes, their influences were significant.

Nostalgia-driven design is often a process driven by the designers' intuition, exceptional passion, engagement and intrinsic motives without much or any front-end research into the potential users or market segment. Nevertheless, **'*Fit*'** and **'*Boldness*'** have been identified to be two principles in the design process that implicitly lead the designers' decision making, especially in crafting iconic authenticity. They enable the revitalising products to make a clear and loud announcement of the phoenix brand's rebirth. Fit allows the customers to recognise the long unseen brand and to emotionally reconnect with it. To achieve that, designers need to pay special attention to the product category relatedness, material selections, and the similarity in design styles (including both the sensory and interactive similarities). In terms of the similarity, multi-sensory thinking beyond merely vision is still uncommon in real-life design practices. Therefore the DENE model presented in Chapter 3 can serve as a systematic structure for guiding a more diverse and innovative design approach in similar projects in the future. Boldness makes sure the 'I'm back' announcement is striking enough. It requires a highly contrasting style in comparison with the offerings of competitive brands. For revitalising a phoenix brand, boldness can be naturally accomplished through critically adopting the design elements of its own classic models, in comparison with inventing a

brand new style. These older design elements represent the unique feeling of times past, the unique local culture, and the cultural nostalgic memory associated with the brand.

In terms of the production process, '***Commitment to Quality'***, '***Made in the Place of Origin'***, and '***Handcrafted'*** stood out as the key drivers of success. The revitalising products of a phoenix brand should be positioned to be affordable but premium with excellent quality, instead of cheap market options with barely acceptable quality. Being handmade in the place of origin greatly enhances the perception of indexical authenticity, by providing hard evidence of the factual and spatiotemporal link with the origin, and the sincerity of the people behind the brand.

In the communication process, a consistent **brand message** and the **channels** used to spread the message are the two most crucial considerations. Phoenix brands normally have a special advantage in evoking emotions and representing the zeitgeist and local culture. As a result, they are more likely to be valued as aesthetic and symbolic resources for sensory and emotional enjoyment, identity construction and expression. The message of a phoenix brand should therefore stress the aspects that are often considered useless yet meaningful and important: the associated cultural nostalgic memory, the intrinsic love and nostalgic passion of the revitalisers and the respect for traditions and moral principles. For the communication channels, **social media** is a great option that is highly interactive and cost-effective. Besides, as the most direct media connecting the brand to its customers, **the revitalising products themselves** eventually convey a message to the customers in a nonverbal way. Without a good product derived from elaborate design and commitment to production quality, the aura of authenticity crafted only through a well-planned and implemented communication strategy can easily vanish if the customers become disenchanted.

Finally, with regard to the issue of sustaining a revitalised phoenix brand for long-term success, the phoenix brand's authenticity may be well further developed and leveraged to achieve this goal. The locals who really personally lived in the times when the phoenix brand was dominant seek true nostalgic experience from its revitalisation in the present. Although a potential phoenix brand in dormancy may well leverage this strength to successfully come back in life, its success can be short without a long-term strategy. A revitalised phoenix brand may establish its long-term strategy on its aura of authenticity, which is a quality that attracts a much broader customer base including the young local creative class and tourists from other cultures, and gradually transforms it from a nostalgic brand to a truly authentic brand deeply rooted in local culture.

Conclusion and Discussion

This doctoral research set out to explore nostalgia, cultural nostalgia in particular, and its impact on design on a global basis. Through an extended literature review, cross-cultural observations, analysis of multiple cases, and synthesis of multidisciplinary knowledge, Part I of this dissertation introduces the analytical discussions about the concept, phenomenon and experience of nostalgia as a contemporary design research topic. On the basis of Part I, Part II narrowed down the research scope to studying the phenomenon of 'phoenix brand' and the viability of nostalgia-driven design as a strategy for brand revitalisation. A single case study and a multiple-case study were designed and conducted to generate new knowledge from real-life cases through analysing the artefacts, the customers' nostalgic narratives, and the design practitioners' thoughts, experiences, and reflections on their nostalgia-driven design processes. Focusing on a case in Finland (i.e. Sarvis), the single case study shed light on the formative mechanism of nostalgic bonds, and initially identified four characteristics of this brand that may be shared by the other phoenix brands. Drawing on three selected cases from three different cultures (i.e. Forever-C in China, Jopo in Finland, and TDK, which originated in Japan but had a global scope of influence), the multiple-case study further validated the identified four common characteristics of phoenix brands, and more importantly explicated the tacit nostalgia-driven design processes through which the three phoenix brands were successfully revitalised. Despite the narrower focus, the knowledge generated in Part II is not only applicable in one specific context but also transferable. Therefore it is also an important complement and validation of the knowledge generated in Part I. At the end of the research, several new issues were raised, which has motivated me to start exploring new intriguing questions. Therefore, I will reaffirm the contributions below and briefly discuss some of the new issues that emerged from the dissertation.

Contributions of the Dissertation

A Redefined Concept of Nostalgia

Based on a comprehensive literature review, the dissertation described how the concept of nostalgia has dramatically changed in the past three centuries from a disease to a normal human experience, and from a negative experience to a pre-dominantly positive experience that promotes wellbeing and creativity. Although contemporary psychologists and sociologists have been quickly contributing new knowledge about how nostalgia benefits individuals and societies, one question remained unsolved in the existing literature: why has nostalgia changed so much? In addition, nostalgia is not a well-defined concept, particularly in the design field. It has been discussed as an inclusive concept characterised by the positive feeling, liking or preference for design styles from the past, without a strict limitations on how distant the past was and whether the 'nostalgic' subject personally lived in the particular past of that particular culture. Such an oversimplified and inclusive con-cept of nostalgia often leads to disputes without a common base of language and understanding.

By clearly differentiating nostalgic experience (as an immediate experience) from nostalgic memory (as a remembered experience), the dissertation redefined nostal-gia as the combination of emotional reactions engendered by the recall of nostalgic memory. Nostalgic memory is always positively remembered so that the nostalgic subject would love to recapture it again in the present. However, nostalgic expe-rience itself is not necessarily always positive. How nostalgia is experienced as an immediate experience is greatly determined by the circumstances under which a nostalgic memory is recalled. The dissertation further proposed that there are three conditions that directly influence the desirability and affective quality of nostalgic experience. The first condition is present negative affect and the perception of a clear distinction between the present and past. This condition ensures the need and desire for nostalgia, and a specific positively remembered past is perceived to be different enough to evoke nostalgic experience. The second condition is being able to share the nostalgic memory and emotions with relevant others. To a great extent, it enables nostalgia to be experienced in a positive tone, as long as it is thought that such sharing is not too difficult. In other words, if one realises that such sharing is impossible or extremely difficult, nostalgia tends to occur as a negative experience. The third condition is having mementos of nostalgic memory (e.g. photographs, videos, artefacts, services) available. These mementos serve as the catalyst of both positive and negative nostalgia, meaning having them around makes both positive nostalgia and negative nostalgia more intensive.

The new definition of nostalgia and the three conditions paved a way for explain-

ing the dramatic change in the concept of nostalgia. Nostalgia has transformed from a negative experience to a predominantly positive experience because the circumstances under which people recall their nostalgic memories have changed fundamentally in comparison with those of three centuries ago. Nowadays, radical and rapid changes in people's lives have drastically increased the need or desire for nostalgia. On the other hand, the rapid development of ICT has also allowed a person to constantly connect and unexpectedly reconnect with his/her old social circles without the barrier of spatial distance, which in turn has significantly increased the perceived possibility of spontaneously communicating and sharing nostalgic memory. Meanwhile, though we believe that the world is changing increasingly fast, the past actually never goes away in the postmodern era like it used to. Tangible artefacts can be easily rediscovered again from online and brick-and-mortar flea markets or museums, and old photos and videos that call up cultural nostalgic memories are openly and widely contributed and shared in digital formats online. Abundant mementos of nostalgic memories further increase the chance that nostalgia is evoked as a more positively toned experience.

Acknowledging their vague boundaries, the dissertation also differentiated nostalgia (i.e. true nostalgia and vicarious nostalgia) from a related experience that could be mistaken for nostalgia (i.e. antiquarian experience, a special liking for or positive feeling for a distant past) by differentiating the enabling memories on a timeline (i.e. direct and indirect memories of recent past and historical knowledge of the distant past). Furthermore, it also argued that the individuality and collectiveness of nostalgia are two essential attributes that co-exist interdependently within the experience, rather than as two opposing types of nostalgia as the previous literature suggests. Which one manifests more positively actually depends on the view from which the researcher studies nostalgia.

A Dynamic and Forward-looking Perspective on Nostalgia and Design

Nostalgia has not been a topic favoured by the design field, in which elite professionals typically aspire to be connected with innovation. When mentioning nostalgia in a design context, the concept is often associated with such adjectives as conservative, backward looking and old-fashioned. Such an impression or stereotype is understandable since nostalgia inevitably involves taking a trip down memory lane, and nostalgia-driven design inevitably involves reconnecting with the past. However, it is a rather isolated and static view on nostalgia that has prevented active design explorations on this topic. Therefore, this dissertation provided a dynamic and forward-looking perspective on nostalgia by examining nostalgia waves as a dialectical process, and establishing a dynamic relationship between radical and

accelerating changes in contemporary societies, the intensified collective need and desire for nostalgia, and the cultural practitioners' (including designers) efforts to combine the progress brought by the changes with those old but still valuable merits that have been lost during the changes.

Some radical changes in societies, such as political and economic revolutions, in general follow a punctuated equilibrium pattern. During a relatively long and stable equilibrium period, members of a society form a broadly shared collective memory and cultural identity. Then a revolution punctuates the equilibrium, breaks its deep structure and leads to significant changes to every individual member's life. Along with great excitement about the new system and opportunities ahead, it is common to have feelings of discontinuity, anxiety, and loss of identity. Cultural nostalgia as a balance regaining mechanism is naturally needed and used to help the society to cope with the transitional period and to reconstruct its cultural identity. Political and economic revolutions are more likely to cause nostalgia waves that have regional scope of influence (i.e. regional nostalgia wave). By contrast, due to accelerating technological changes with instant worldwide penetration, the world is in a state of flux, which in turn has ensured that the nostalgia wave is a global phenomenon. As technological changes greatly follow the model of continuous change, the desire for nostalgia driven by them may not occur as undulating waves with sudden ups and downs, but continuously at a relatively high level, increasing as change accelerates in the future. Nostalgia is a natural response toward radical and rapid changes. No one can accurately predict what exactly is going to happen in the future, but two things are certain. First, more changes will come and most likely at an accelerating pace. Then, second, the need for nostalgia will be intensified as a response. When the majority of designers are focusing on continuously introducing brand new things to change the world, perhaps some should explore how nostalgia could provide a balance, and help the society to cope with the changes, strengthen our cultural roots, and provide more alternative lifestyle options.

A More Diverse View on Designing for Nostalgic Experience

Opting for a retro visual style is perhaps the most common approach to designing for nostalgic experience. However, new design outcomes that look old are not necessarily able to evoke nostalgic experience. In fact, the majority of them reveal a lazy and oversimplified retro design process without sufficient originality, innovative inputs, or creative reinterpretation. I attribute this to the lack of a clear understanding of the underlying mechanism whereby nostalgic experience is evoked. As a response to this dissatisfaction, a heuristic model (DENE) was proposed in order to inspire designers to think beyond retro appearance and suggest more diverse and creative approaches to designing for nostalgic experience.

This model emphasises the mediating role of nostalgic memory retrieval in nostalgic experience. Both explicit memory and implicit memory are possibly recalled during the interaction with a design outcome. Explicit memory retrieval enables nostalgia as an experience of meaning, whereas implicit memory retrieval facilitates nostalgia at the aesthetic level. In this sense, successful nostalgic design outcomes can be seen as appropriate and innovative mementos of nostalgic memory. The model also provides guidance to understand the interplay of user(s), context, product and interaction in relation to designing for nostalgic experience. As argued in the dissertation, nostalgia is an experience that is more likely to be evoked and enjoyed when the users are in an action mode, such as in a leisure context rather than an intensive goal-achieving mental mode. Auditory and olfactory cues for nostalgic memory were proposed to be alternative sensory modalities that designers should explore. Moreover, operational interactions (i.e. screen interactions, tangible/analogue interactions, and bodily interactions) that enable nostalgia-evoking actions, movements, and behaviours (e.g. drawing a watch on your wrist, operating a rotary telephone, dancing and cycling in the same position as you used to in your youth) and social interactions were discussed as cues that would be more likely to evoke nostalgic experience without being too obvious in terms of copying an old visual style, and which would provide more of a surprise.

A Multiple-layered Understanding
of the Formation of Nostalgic Bonds

One of the most intriguing phenomena related to nostalgia-driven design strategy is what I call the 'phoenix brand' – dormant brands and their obsolete first-life products that used to be mundane, commonly seen and dominant in a society later become culturally and emotionally valuable items, and are then revitalised by passionate creative individuals who realise the change in their value. The nostalgic bond that people have with a dormant brand is the core asset providing it with the potential to be revitalised as a phoenix brand. This phenomenon is found in many different cultures.

Taking a combination of Holbrook's typology of perceived value (1999, 2006), the Rubbish Theory (Thompson, 1979, 2003), and part of the DENE model introduced in Chapter 3 as a theoretical and analytical framework, this dissertation examined the formative process of a nostalgic bond. In general, the process can be seen from different perspectives as presented in Table 1. During this process, the customer perceives significant value changes in both volume and hierarchical structure. Typically, during a phoenix brand's first life, customers perceived utilitarian value as the leading type of value. Its products therefore were meant to offer high efficiency and convenience at this stage. Meanwhile, although the brand and its products might

The Rubbish Theory	The Phoenix Brand	The Classic First-life Products	Nostalgic Bond	Primarily Concerned Types of Value
Transient	Birth	Original Design & Production	Memory Formation	Utilitarian
	Dominance	Everyday Use		
Rubbish	Dormancy	Obsoleteness	Provisional Oblivion	Seemingly Valueless
Durable	(Potential) Rebirth	Collectible	Memory Retrieval	Hedonic & Sociocultural

Table 6. Viewing the formation process of a nostalgic bond from different perspectives and layers.

be mundane and highly accessible in the first life, this was a process in which customers form their nostalgic memories; these memories are collective, although the personal details differ. It was the formation of this cultural nostalgic memory that buried the seed of the later nostalgic bond. When the brand failed to cope with the external changes and lost its dominant position, all its value was perceived to be decreasing, especially its utilitarian value. At the same time, the brand was going dormant and its products were becoming obsolete. During the dormancy of this brand and the obsoleteness of its first-life products, customers experienced a provisional oblivion, a necessary phase for the brand and its first-life products to cultivate the fruit of cultural nostalgia. After it stayed dormant for years or decades, some members of society started ascribing increasing sociocultural and hedonic types of value to this brand and its first-life products, because these products had become valid original mementos of their cultural nostalgic memory. This change in perceived value eventually provided an opportunity for the dormant brand to come back to life mainly as a symbolic resource for identity construction and expression, and a hedonic resource for aesthetic enjoyment.

The Common Characteristics of Potential Phoenix Brands

Obviously, not every dormant brand would have the same chance to become a phoenix brand. Thus, clarifying which common characteristics are shared by potential phoenix brands would help strategic designers or brand managers to identify more dormant brands that may be revitalised through nostalgia-driven design. The results

of the case studies have revealed that if a dormant brand has the following four characteristics, it is very likely to be revitalised as a phoenix brand in the future:

From the dormant brand's perspective:

1) It had a relatively long life span in its first life (e.g. long brand history, some of the obsolete products are still in use today and have become collectables).

2) It had great popularity or dominance in its first life.

From the customers' perspective:

3) A high proportion of one or more user generations were heavily and collectively exposed to the brand during their critical periods (e.g. childhood, adolescence and young adulthood)

4) The majority of them associate positive memories with the brand and its first-life products.

Strategic designers or brand managers may evaluate their dormant brands according to these four characteristics. If a dormant brand is evaluated to have high potential, the brand owner may consider inviting strategic designers, brand historians and anthropologists to systemically document and record the dormant brand's history as well as the customers' memories about it, which can be highly useful in its future revitalisation.

A Design-led Integrated Strategy for Phoenix Brand Rebirth

The practice of nostalgia-related brand revitalisation has been generally studied from a marketing perspective as a business strategy called 'retro-marketing' (e.g. Brown, 1999; Brown, Kozinets, & Sherry Jr, 2003). Although in real-life cases, designers were actually often the ones who passionately initiated and conducted the brand revitalising projects, few studies have examined the strategy from the perspective of design. Therefore, the dissertation examined how nostalgia-driven design has been deployed as a strategy for phoenix brand rebirth.

Drawn from a multiple-case study, the results have shown that the key to successful revitalisation is to craft an aura of authenticity around the phoenix brand. To enable a fruitful analysis of crafting authenticity, the dissertation deconstructed this multi-layered concept contextually. Two core aspects of authenticity are particularly relevant to the current research context. The first one is the genuineness of the recreated mementos, which assures the public that the phoenix brand and its products are still 'the real things' that can carry their cultural nostalgic memories. The other one is the sincerity of the people behind the revitalisation, which downplays the commercial agenda, highlights the revitalisers' intrinsic motives, and eventually

assures the customers that their cherished memories are not being evilly exploited for commercial profits alone or primarily.

   In addition, although revitalisation can be led by design, authenticity can hardly be crafted in the design process alone, but has to be synergistically crafted in the design, production and communication processes. Firstly, in the design process, 'Fit' and 'Boldness' have been identified as two principles that enable the revitalising products to make a clear and loud announcement of the phoenix brand's rebirth. Reconnecting the customer and the long unseen brand emotionally is also of key importance. Secondly, the production process highlights 'Commitment to Quality', 'Made in the Place of Origin' and 'Handcrafted' as the key drivers. Thirdly, the communication process requires an authentic and consistent brand message to be spread to the world through effective channels. The brand message that enhances the authenticity of a phoenix brand normally contains three key themes: the associated cultural nostalgic memory, the intrinsic love and nostalgic passion of the revitalisers and the respect for traditions and moral principles. Social media has proven very useful as a highly interactive and cost-effective channel for spreading the message. In addition, as the most direct message channel, the revitalising products themselves would eventually convey the message to the customers in a nonverbal way. Therefore, without excellence in design and production, authenticity built only on a well planned and implemented communication strategy can easily vanish if the customers become disenchanted.

Discussions and Future Research

Cultural Nostalgia and Social Design

As discussed in Chapter 2, the potential of nostalgia has been mainly explored and leveraged in the design cases for commercial success. Although the designers of these cases typically showed intrinsic motives and more or less bore the relevant social needs and cultural significance in mind, their design works cater to only a limited number of social needs related to nostalgia. Thus, on the basis of an up-to-date understanding of the functions of nostalgia in promoting wellbeing and increasing creativity, and how to better design for nostalgic experience, social design practitioners and researchers would find many more exciting new directions to explore, especially in the public sector. As illustrated in Chapter 2, public transport systems, museums, libraries, and elderly care homes are probably among the first public sector institutions that a social designer could work with on nostalgia-driven design for social good. For instance, they could explore how nostalgia-driven design can be applied to encourage people to cycle more, help the local community

to develop and strengthen its cultural identity, find out the new meaning of libraries in the digital era, and improve the wellbeing of older people in transition or living with dementia. On the other hand, the rosy effect of cultural nostalgia is often misused. This perhaps can be very well illustrated by the recent rise of populism in many western democratic systems, from Brexit to Donald Trump. In these cases, nostalgia was clearly misused as a rhetorical strategy to manipulate the public's emotions, to make them blindly believe that the past was better than the present. This is a very dangerous signal in politics and international affairs. Considering the design discipline's ambition to make a profound social impact, how to improve the public's awareness and understanding of such a misuse of cultural nostalgia, and how to work with other experts and stakeholders to collaboratively design new policies to prevent such misuse can be great topics for design researchers to explore in the immediate future.

Nostalgia through Bodily Interaction

In the current design practices, giving retro visual style is still the dominant approach to designing for nostalgic experience. It may be effective, but products with only retro visual styles have overloaded the market. Such an approach to designing for nostalgic experience is more likely to end up with an outcome lacking in innovation. As I have pointed out in Chapter 3 and Chapter 7, although perhaps without taking nostalgia into consideration, the emerging research and practices of tangible interaction and bodily interaction design may provide an astonishing new approach to designing for nostalgic experience. More specifically, nostalgia-driven design may result in outcomes that guide the users to move, act, and behave as they used to, and utilise such movements, actions, or behaviours as the cues for nostalgic memory. Such an approach could enable a nostalgic experience without replicating an old visual style, and is more likely to elicit pleasant surprises. As discussed in Chapter 7, bodily interaction has been considered, though implicitly, in the design of highly interactive, but mechanical and analogue types of products (e.g. bicycle). In terms of digital interactive products, however, such practices are rare. Therefore, it reveals an exciting direction for future research and practice.

Methodological Reflection: Introspection

Introspection, as a research method, refers to a situation in which the researcher uses his/her own personal past or immediate experiences, thoughts and emotions as data, either fully or partially, and analyses them to investigate a relevant research topic (Gould, 1995; Wallendorf & Brucks, 1993). This method is highly controversial as its critics argue that it has several drawbacks in terms of, for instance, data specificity, documentation, the sampling representativeness, the necessary distance

between the researcher and the researched (Wallendorf & Brucks, 1993). With a similar concern for limiting my bias in the research and the potential troubles it might cause, I tried not to use introspection (or strictly control its influence and deny its importance). However, every time I reflect on the research process, I realise that my introspection has been playing a crucial role in generating research questions, building connections with the informants, making sense of data, and forming new theories. During the past years, almost every time when something evoked my nostalgia, I examined it through my deepest meditation from every possible angle. Of course, my personal introspective experiences were not the only source of data in the current research, but they comprised the only unacknowledged source. Thus, at the end of this dissertation, I decided to honestly face and accept that I am not only a researcher, but also a culturally sensitive and emotionally capable human being who experiences nostalgia and many other experiences in everyday life.

Despite the abovementioned shortcomings of introspection, it is widely practiced, especially in areas where researchers endeavour to understand and form theories about subjective experiences and emotions, such as psychoanalysis (e.g. Freud, 1908/1965), psychology (e.g. Arnold, 1960) and consumer research (e.g. Brown, 2006; Gould, 1995, 2012; Holbrook, 1997, 2005). After all, one cannot examine and understand another person's subjective experiences and inner states better than one's own (Hixon & Swann, 1993). According to how and how much a researcher relies on introspection in a study, Wallendorf and Brucks (1993) categorise four types of commonly practised introspection. *Researcher Introspection* refers to a situation in which 'the researcher and subject/informant are the same person, and there are no other subjects/informants' (ibid., p. 341). On the contrary, when conducting *Guided Introspection,* the researcher guides the informants (i.e. people other than the researcher) to introspect their internal states and experiences. *Syncretic Forms of Introspection* are characterised by combining the researcher's introspection and the others' introspections with the analytic distance under consideration. *Interactive Introspection* occurs when the researcher and the informants directly share their introspections with each other. In this research, I actually used three types of introspection at different phases of the research without clear knowledge about their differences. I used researcher introspection at the beginning to identify research questions and directly generate my own initial answers to some of them, though I kept them open till the end. Most interviews were conducted in a syncretic form of introspection. For example, in the case study of Sarvis, ten informants shared their thoughts, experiences, and opinions with me, and some of them immediately introspected on their nostalgic experiences. With the data accumulating, I, as a highly empathic person, searched my memory for similar experiences that happened to me in the past under similar circumstances, and analysed them by constantly compar-

ing them with the informants' introspections. In some interviews with the designers, such as with Wang and O'Connor, interactive introspection naturally happened because I share the particular cultural nostalgic memories of Forever and TDK with them. The interviewed designers were not passive information providers, but also immediately and actively analysed their nostalgic memories, experiences and the design processes during the interviews. Though it was normally at the end of the interviews, I did share my introspections with them too.

When consumer researchers started investigating the experiential aspects of consumption, introspection emerged and was accepted as a research method in the field. Without introspection, Gould (1991, p. 194; 2012, p. 453) claims that 'much of consumer research has failed to describe many experiential aspects of my own consumer behaviour, especially the everyday dynamics of my pervasive, self-perceived vital energy'. The development of the introspection method in consumer research was clearly a result of such a frustration, and the realisation of the special advantages of introspection on examining experiences, as Gould (1995, p. 720) also notes that, 'In applying this method, I have had immediate access to a vast amount of cognitive and sensory data that I could never obtain from other subjects, and I am able to discern clear patterns in my internal phenomena over time.'

Similarly, Brown (1998) argues that no research method is perfect, and on the basis of a good understanding of its weaknesses and the situations it is suitable for, introspection can be used for good reasons. Apart from some obvious practical advantages, such as access to unrestricted data, convenience in fieldwork and research ethics, introspection offers rich and specific data on one particular person who is playing two different roles at the same time (i.e. the researcher and the informant). Such depths of insight are hardly obtainable through other methods when dealing with the inner states of people.

Holbrook is one of the most important scholars in consumer research and research into nostalgia, one of the pioneers and most active advocates of introspection, and also perhaps the scholar who I have quoted most in this dissertation. He (1995, 1997) views the researcher's personal introspection as the ultimate form of participant observation. After a seminal paper on experiential aspects in consumption (Hirschman & Holbrook, 1982), most of Holbrook's research has dealt with human experiences in the context of consumption, and therefore he naturally has frequently used different types of introspection as research methods in his studies. Of course, there have been many debates on the legitimacy of such a research method. The result of these debates in the consumer research area may be well concluded by Campbell (1996) thus:

Introspection is a legitimate method of inquiry open for use by any researcher or scholarly investigator, no matter what their discipline. To reject it out of hand on the pretext that it is 'unscientific' strikes me as particularly churlish if only because it should be obvious that the study of a wide range of phenomena is necessarily dependent on such an activity. Those who wish to investigate topics as various as backache, daydreaming, nostalgia, creativity and mystic enlightenment are all in the first instance dependent on reports that derive from introspection. To accept that such data are indispensible when originating from 'subjects' but to deny it any value when it originates from 'researcher as subject' has always seemed to me to be a peculiarly inconsistent standpoint. (Campbell, 1996, p. 100)

Without a doubt, experience has been and still is an important and fast-growing topic in design research. Can introspection also be acknowledged and systematically used in design research as an alternative research method for studying human experiences? With this seed question, I plan to take introspection as a methodological topic to explore further in the context of design research in the future.

Driven by Authentic Experience: A Post-industrial Approach to Traditional Design Practices

Crafting authenticity synergistically in design, production and communication processes emerged from the multiple-case study as the key to successful nostalgia-driven design. This finding is applicable to nostalgia-driven design in all given design contexts, and not just for revitalising a phoenix brand. Meanwhile, putting nostalgia aside, authenticity itself has shown great potential to be a fascinating topic for future design research, as it is an essential experiential quality that customers, especially the young creative class, seek for in the post-modern and post-industrial era. As authenticity is not an inherent attribute of an object but the result of a subjective evaluation made by a particular person in a particular context, it may be interesting to explore how to design for perceived authenticity in an apparently inauthentic environment (e.g. digital). In addition, since authenticity is also a multi-layered concept that includes not only the originality and genuineness of the object, but also the sincerity of the people behind it, how to design for service authenticity may be explored in the context of service design. Speaking personally, the connection between authenticity and design that I am keen to explore soon is how designing for authenticity may lead to a post-industrial approach to traditional design practices.

The design discipline has gone through a rapid and prominent transformation in recent years. In step with the fast growth of the ICT and service industries, design

schools around the world have been actively developing new areas, such as interaction design, experience design, service design and design thinking and strategy, that may better contribute to these industries. Recent design graduates who specialise in these new design areas have also found themselves in a position of advantage in securing jobs. As a result, increasingly more designers are devoting themselves to dealing with complex and intangible issues. As a design researcher myself, I am very excited to see such progress in the discipline, and the value and potential of design being better recognised and more broadly acknowledged, explored and utilised. However, we have to acknowledge that not all designers share the same passion for these new design practices. Such changes in the design field have also formed a popular impression that many traditional design practices that deal with creating tangible artefacts are dying in the post-industrial economy, in the same way as manufacturing is considered a sunset industry. Having worked in a design school with a long art and design tradition, I felt the strivings and worries of those traditional design practitioners who are passionate about design in a more traditional sense.

Regarding this issue, again, I have seen that the challenges are accompanied by opportunities. Traditional design practices are not dying, but need to be thought about from a new perspective, and a post-industrial approach is required for them to thrive. In other words, not all designers have to become strategic designers, interaction designers, experience designers, and service designers, but every designer needs to form an experience-driven mindset to be able to succeed in the post-industrial era. I believe that the framework of crafting authenticity in design, production and communication can be well adopted to help traditional design practitioners to transform their small workshops in local creative neighbourhoods into authentic brands offering products with high sociocultural, hedonic and altruistic types of value that are highly attractive to the worldwide creative class. Therefore, to introduce these findings to design students who are passionate about craft and tangible artefacts may effectively help them form a new and more promising view on their career pathways.
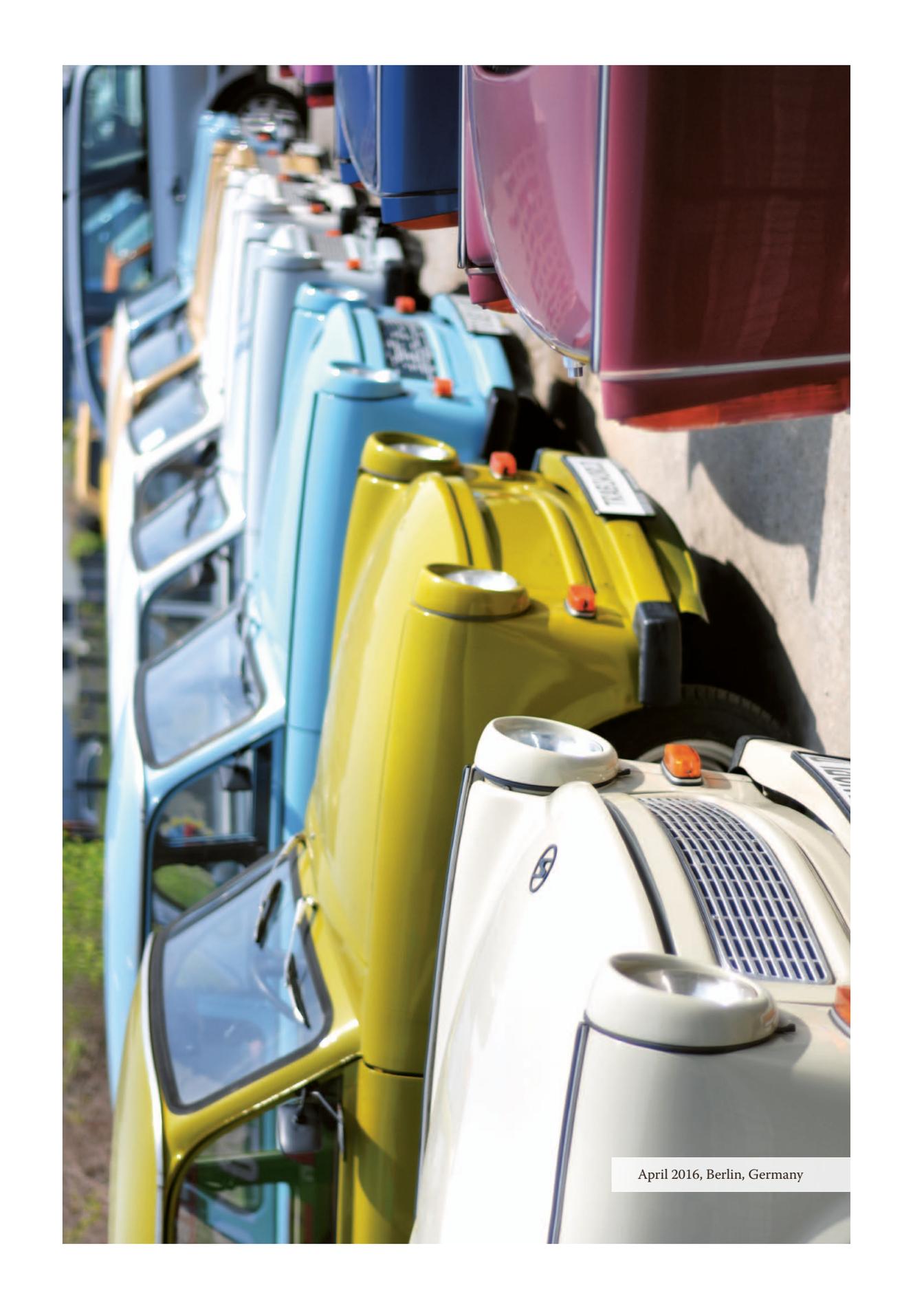
April 2016, Berlin, Germany

April 2016, Berlin, Germany

July 2010, Shanghai, China

Sep 2012, London, England

"They had to pry this thing out of my hands. My apologies to TDK. There's no remote c... They shouldn't have had to see me cry like that." "De...

—DONALD BELL, CNET SENIOR EDITOR

"How could the designers overlook bluetoo... maybe if you design them for the streets...

"Wow this brings back ... That's like drawing a mustache o... I don't know if I'd think... do they insist on putting the ... on this boombox will b...

...and small LCD Panels on th... Put Their Speakers Where You C...

"Analog has a heart, digital has a pacemaker."

MUSIC PROPHET

October 2012, Portland, Oregon

March 2014, Helsinki, Finland

November 2013, Hanko, Finland

November 2013, Hanko, Finland

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Haian Xue (b. 1983, Xi'an) has a background in Industrial Design and holds a Master of Arts (Beijing Institute of Technology) and a Bachelor of Engineering (Beihang University). In past eight years, he has lived and worked in Finland, the UK, and the USA as a design researcher and teacher. His research interests stand at the intersections of design, experience, cultural memory and strategy. In addition, he also finds his (spare time) passion in philosophy, physics and history.

This doctoral research takes a dynamic, forward-looking and experiential perspective to examine the multifaceted relationship between design and nostalgia for two purposes: 1) to serve as a ground-clearing work for analytical discussions about nostalgia in the design field, and 2) to study the viability of nostalgia-driven design as a strategy for brand revitalisation. The investigation is developed from three design-related angles: 1) nostalgia as a sociocultural phenomenon, 2) as a subjective experience, and 3) as the basis of a design strategy.

This book is divided into two parts. Part I introduces how the concept of nostalgia has dramatically changed in the past three centuries from a disease to a normal human experience, and from a negative experience to a predominantly positive experience that promotes wellbeing and creativity. It redefines nostalgia as a conditional concept and provides the design field with an updated understanding of nostalgia in relationship to the radical and accelerating changes. It further demonstrates what (commercial and social) design opportunities may accompany with the increasing need for nostalgia, and how designers may better and more creatively design for this experience. Part II, through studying four real-life cases, explores the underlying nostalgic bonding process, and explicates how nostalgia-driven design has been used to revitalise dormant brands in practice. Drawn from both previous theoretical discussions and the tacit knowledge of the designers who participated in the case studies, it identifies crafting an aura of authenticity to be the latent key to successful nostalgia-driven design strategy. Accordingly, it develops a systematic analysis on how authenticity may be crafted synergistically in design, production and communication terms.

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