



Do optimism and pessimism have different relationships with personality dimensions? A re-examination

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ABSTRACT

The classic, well-cited study by Marshall et al. (1992) demonstrated that optimism correlates stronger with extraversion than does pessimism and pessimism correlates stronger with neuroticism than does optimism, and these results lent support to their claim that optimism and pessimism are two separate constructs. However, we argued that their results are likely the outcome of scale artefact caused by item valence (or item favorability). In an empirical study ($N = 1016$), we evaluated the correlation of optimism scores and pessimism scores with the most common measure of optimism – Life Orientation Test-Revised (LOT-R). As expected, when item valence effect was not controlled, we replicated the finding by Marshall et al. (1992) that optimism and pessimism show differential correlations with extraversion and neuroticism. After item valence was controlled such pattern of relationships was greatly reduced. Suggestions for future research to resolve the dimensionality debate for optimism–pessimism are discussed.

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1. Introduction

Drawing an accurate conclusion regarding the dimensionality of a construct has substantive implications for future research and practice. One important example is the construct of optimism. Some researchers believed that optimism is a unidimensional construct, with optimism at one pole of the dimension and pessimism at the other; others argued that optimism and pessimism are distinct constructs. This debate has continued for two decades but has yet to reach a firm conclusion. As the original authors of the scales recently stated, “It [the answer to the dimensionality of optimism] remains an important clinical as well as theoretical question, in that some have argued that interventions should be targeted to address optimistic as well as pessimistic cognition” (Carver, Scheier, & Segerstrom, 2010, p. 3). In addition, if optimism is two-dimensional, academic researchers will need to treat optimism scores and pessimism scores separately when examining their potential relationships with other variables. In contrast, if optimism is unidimensional, such efforts would be futile. The argument for its bidimensionality comes from an early study correlating optimism and pessimism with personality (Marshall, Wortman, Kusulas, Hervig, & Vickers, 1992). The purpose of the current study is to re-examine these correlations. We argue that past research concerning the distinct correlations for optimism and pessimism on

personality can simply be the result of scale artefact. More specifically, we argue that the *valence* of optimism and pessimism items influence how the scale scores correlate with other constructs. Before we elaborate on our explanation, we will first review briefly the debate regarding the dimensionality of optimism.

1.1. Dimensionality debate on optimism–pessimism

The most common measures of optimism are the Life Orientation Test (LOT; Scheier & Carver, 1985) and its revised version (LOT-R; Scheier, Carver, & Bridges, 1994). These instruments were originally designed to measure optimism and pessimism along one dimension. However, when researchers used factor analysis to assess the dimensionality of LOT or LOT-R, they consistently found that a two-factor solution fit the data better than a one-factor solution (e.g., Kubzansky, Kubzansky, & Maselko, 2004; Marshall et al., 1992; Robinson-Whelen, Kim, MacCallum, & Kiecolt-Glaser, 1997; Scheier et al., 1994). The two factors are represented by regular-keyed items measuring optimism and reverse-keyed items measuring pessimism. Regular-keyed items measure the presence of a construct (e.g., “In uncertain times, I usually expect the best” for the construct of optimism); reverse-keyed items measure the absence of a construct (e.g., “If something can go wrong for me, it will.”). However, according to more recent research, the two-dimensional interpretation of optimism may be due to different response styles for regular-keyed and reverse-keyed items. Particularly, Rauch, Schweizer, and Moosbrugger (2007) demonstrated that socially desirable response bias correlated significantly with participants’ answers to regular-keyed items in LOT-R. As

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such, the authors concluded that the distinct loadings of optimism and pessimism items in factor analysis are simply an artefact. Similarly, McPherson and Mohr (2005) discovered that evidence for the bi-dimensionality of optimism was partly caused by item wordings. Strong wording (e.g., “I’m *always* [italics added] optimistic about the future”) will more likely induce regular- and reverse-keyed items to load on separate factors compared to weaker wording (e.g., “I’m *often* [italics added] optimistic about the future”); see McPherson and Mohr (2005) for further explanations). Other researchers who examined the dimensionality of optimism also drew a similar conclusion. Vautier, Raufaste, and Cariou (2003) compared two models of optimism, namely (1) a two-dimensional model and (2) an unidimensional model with a response artefact factor caused by the use of items with opposite keying directions. They showed that the second model fit the data better than the first model, again suggesting the existence of response artefact caused by item keying in the measurement of optimism. However, the dimensionality debate regarding optimism does not end with these factor analyses.

In addition to testing the factor structure of an optimism measure, some researchers also examined differences in the nomological network of optimism and pessimism. Optimism was calculated by averaging the scores of regular-keyed items in LOT-R. In contrast, pessimism was calculated by averaging the scores of reverse-keyed items in LOT-R. The idea of these analyses is that optimism and pessimism should have a different magnitude of correlations with other variables if they indeed represent two separate constructs. In contrast, if they are the same construct, they should have the same magnitude of correlations with other variables. In a seminal study that examined these correlations, Marshall et al. (1992) proposed and empirically demonstrated that optimism correlated stronger with extraversion than did pessimism, and that pessimism correlated stronger with neuroticism than did optimism (ignoring the sign of the correlation coefficients). These researchers predicted this finding because they argued that both extraversion and an anticipation of positive events (i.e., optimism) should be related to heightened sensitivity to “signals of rewards” (Marshall et al., 1992, p. 1068). In contrast, they predicted that both neuroticism and an anticipation of negative events (i.e., pessimism) should be related to heightened sensitivity to “signals to punishment” (p. 1068; also see Gray, 1987). Later research, however, did not always consistently support the claim that optimism and pessimism have distinct correlations with other variables (e.g., Kubzansky et al., 2004). Nevertheless, Marshall et al.’s (1992) study has been extremely influential: it has been continuously and frequently cited as an early and important piece of research evidence supporting a two-dimensional interpretation of optimism (e.g., Chang & Sanna, 2001; Herzberg, Glaesmer, & Hoyer, 2006; Litt, Tennen, Kadden, & Affleck, 2001; see also Carver et al., 2010) and thus it is the focus of the current research. In the current paper we propose an alternative explanation for Marshall et al.’s (1992) findings. Specifically, we argue that item valence causes optimism and pessimism to have differential correlations with extraversion and neuroticism.

1.2. Role of valence

Kam and Meyer (2011) proposed that item valence can bias the results of nomological network research in favor of a two-dimensional structure of a construct. When measuring a construct, researchers often include both regular-keyed and reverse-keyed items to capture the opposite ends of a bipolar construct and to control for acquiescence response bias. However, regular-keyed and reverse-keyed items also differ in their valence or favorability (Peabody, 1967). For example, regular-keyed

items of optimism are usually favorable in meaning (e.g., “I’m always optimistic about my future” for LOT-R); in contrast, the reverse-keyed items reflecting pessimism are usually unfavorable in meaning (e.g., “If something can go wrong for me, it will” for LOT-R). The same is true for many personality constructs such as extraversion and neuroticism. Regular-keyed items for neuroticism, for example, are usually unfavorable in meaning (e.g., “I feel blue”); its reverse-keyed counterparts are usually favorable in meaning (e.g., “I am a calm person”). Therefore, item content is usually confounded with item valence. When participants answer an item, their response can be influenced by the valence (or favorability) of the item in addition to its actual content.

According to Kam and Meyer (2011), the confound between item valence and item content can influence the correlations between constructs. When two constructs are measured by items of the same valence, their correlation will be inflated because their relationship represents not only the content of the two constructs but also the valence of the items. In contrast, when two constructs are measured by items of opposite valence, their correlation will be deflated because their relationship is underestimated by their differential item valence. As an illustrative example, when extraversion and neuroticism are measured predominantly by regular-keyed items (e.g., “I am outgoing” for extraversion and “I am depressed” for neuroticism), Extraversion scores will have strong positive valence and neuroticism scores will have strong negative valence. Extraversion scores may then correlate stronger with optimism scores than pessimism scores because both optimism and extraversion scores share the same positive valence. Similarly, neuroticism scores may correlate stronger with pessimism scores than optimism scores because both pessimism and neuroticism scores will share the same negative valence.

The classic study by Marshall et al. (1992) measured extraversion and neuroticism with an early version of a Big Five measure – NEO FFI (Costa & McCrae, 1989), and they discovered that optimism correlated stronger with extraversion than did pessimism and pessimism correlated stronger with neuroticism than did optimism (ignoring signs). However, this early version of NEO FFI scale consisted of predominately regular-keyed items for measuring extraversion and neuroticism (i.e., nine of 12 items for each of the two traits were regularly-keyed). Therefore, the pattern of results may have been due to an item valence effect. According to this rationale, however, in other studies where a construct such as extraversion or neuroticism is measured by a balanced set of oppositely-valenced items, the bias effect of valence will be cancelled out. In this case, extraversion or neuroticism will be less likely to show differential correlations with optimism or pessimism.

1.3. The current research

The aim of the current research is to re-examine the correlations of optimism vis-à-vis pessimism with the Big Five personality traits.¹ Marshall et al. (1992) did not examine personality dimensions other than extraversion and neuroticism. By including more personality dimensions in the empirical study, we can examine the general pattern of how item valence can influence correlations of optimism and pessimism with more constructs, putting Kam and Meyer’s (2011) idea about the role of item valence in a construct dimensionality debate to a careful test. To examine this effect of item valence in the current study, we correlated optimism and pessimism

¹ Factor analytic results regarding both LOT and LOT-R scales have been discussed extensively elsewhere (e.g., Rauch, Schweizer, and Moosbrugger, 2007) and thus are not the focus of the current research.

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