INSTITUTE OF
INTERDISCIPLINARY STUDIES
IN HUMANITIES
AND SOCIAL SCIENCES

Addleton
Academic
Publishers



Journal of Research in Gender Studies

Volume 8(2) • 2018

Institute of Interdisciplinary Studies in Humanities and Social Sciences • New York

Journal of Research in Gender Studies

VOLUME 8(2) • 2018

ADDLETON ACADEMIC PUBLISHERS • NEW YORK

Journal of Research in Gender Studies
An international peer-reviewed academic journal
Volume 8 / Number 2 / 2018
© 2018 by the Institute of Interdisciplinary Studies
in Humanities and Social Sciences, New York

Journal of Research in Gender Studies is a peer-reviewed interdisciplinary journal that aims to publish critical and theoretical constructive contributions across the large spectrum of humanities – literature, law, history, philosophy, religion, and visual and performing arts (including music and theatre), anthropology, area studies, communication studies, cultural studies, and linguistics, social sciences, behavioral sciences, medicine and public health, science and technology, democracy studies, women's studies, men and masculinity studies, queer studies.
Acceptance Rate (2017): 9%

Journal of Research in Gender Studies is published twice a year (July and December) by Addleton Academic Publishers, 30-18 50th Street, Woodside, New York, 11377. All papers in this journal have undergone editorial screening and anonymous double-blind peer-review. ISSN 2164-0262, eISSN 2378-3524, OCLC Number: 780797930.

Editor: Najib Redouane (California State University, Long Beach)
Editor-in-Chief: Ramona Mihăilă (Dimitrie Cantemir Christian University)
Assistant Editor: Shamsun Nahar (University of Texas at Arlington)
Online submissions to: ramona.mihaila@addletonacademicpublishers.com

Addleton Academic Publishers is an imprint of RIOTS, New York.

Please direct subscription, contributions, back-issue requests, and address changes to editors@addletonacademicpublishers.com

Produced in the United States of America

MARKETING
The marketing strategy for ***Journal of Research in Gender Studies*** is designed to maximize the Journal's profile, reach and readership. This is achieved through: targeted electronic marketing to relevant contacts; promotion at conferences globally; highlighting the best content in the Journal; and attracting the best authors to publish in the Journal.

MANUSCRIPT CATEGORIES
Journal of Research in Gender Studies publishes research papers, review papers, conference papers, short communications, and book reviews.

INDEXING AND ABSTRACTING
Journal of Research in Gender Studies is indexed and/or abstracted in CEEOL, Cengage Learning/Gale, CNKI Scholar, Crossref, DeepDyve, EBSCO, ERIH PLUS, HeinOnline, Hinari, IBSS, Index Islamicus, ProQuest, Scopus, SHERPA/RoMEO, and Ulrich's Periodicals Directory.

EDITORIAL ADVISORY BOARD

Bárbara Álvarez Rodríguez Stanford University
Anna Babka University of Vienna
Marianne Baudin Université Paris-Sorbonne, Paris XIII
Rena Bivens Carleton University
Mónica Bolufer University of Valencia
Olga A. Burukina Moscow State Linguistic University
Frédéric Canovas Arizona State University
Cyra Akila Choudhury Florida International University
Heather Clarke University of Wisconsin-Green Bay
Sophie Coavoux The Jean Moulin University Lyon 3
Claire M Crabtree University of Detroit
Cristiana Cristureanu Dimitrie Cantemir Christian University
Zoe Dirse Sheridan College Toronto
Corina Adriana Dumitrescu Dimitrie Cantemir Christian University
Mychel L. Estevez Portland State University/The University of Portland
Isabelle Favre University of Nevada, Reno
Corrine Fournier-Kiss University of Fribourg
Arianne M. Gaetano Auburn University
Rubén García-Sánchez Autonomous University of Madrid
Shelley Grant University of Washington
John Heath University of Vienna
Matilda Hellman University of Helsinki
Cristina Herrera El Colegio de México
Susanne Hochreiter University of Vienna
Daniel Holcombe Clemson University
Nancy Honicker Université de Paris VIII
Nancy Isenberg University of Rome III
Greg Kucich University of Notre Dame
Justine Legrand Paris Sorbonne University
Hélene Lenz Université de Strasbourg
Isabel Lousada Nova University, Lisbon
Pamela McCauley Bush University of Central Florida
Montserrat Serrano Mänes Universidad de Granada
Viviana Meschitti Birkbeck, University of London
Anne Marie Miraglia University of Waterloo
Mechthild E. Nagel State University of New York, Cortland
Efstratia Oktapoda Université Paris-Sorbonne, Paris IV
Arnaud Paturet CNRS/ENS, Paris
Najib Redouane California State University, Long Beach
Klas Roth Stockholm University
Esther Ruiz Ben The Technical University of Berlin
Rui Shen United States Naval Academy
Marie Nedregotten Sørbø Volda University College

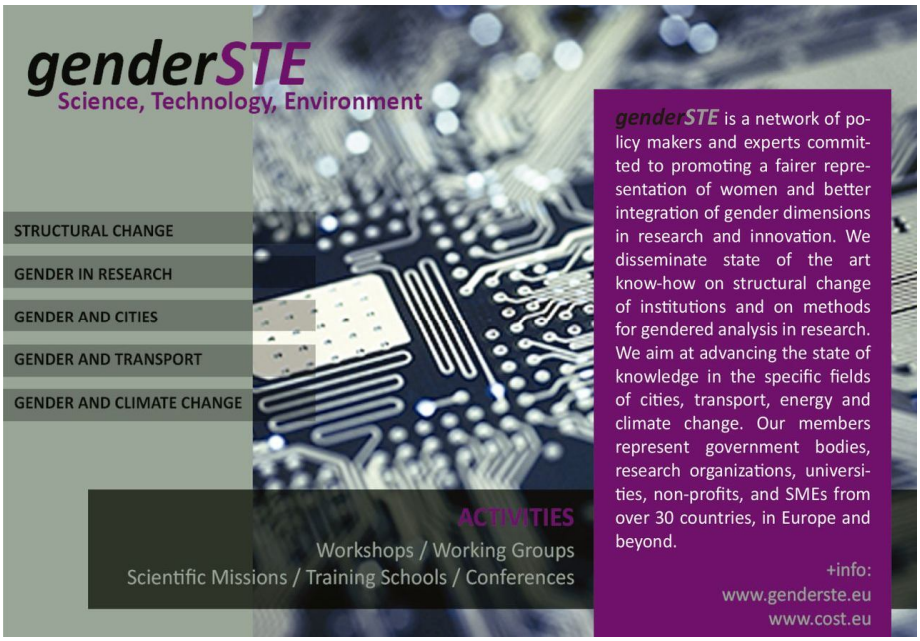
Brigitte Urbani Université de Provence, Aix-en-Provence
Susanne Maria Weber Philipps-Universität Marburg
Carolyn Wells Kraus University of Michigan, Dearborn
Gregory White University of Maryland, College Park

Scholars whose papers have been published in
Journal of Research in Gender Studies include:

Bárbara Álvarez Rodríguez Stanford University
Anna Babka University of Vienna
M. V. Lee Badgett The University of Massachusetts Amherst
Maria Amor Barros-Del Rio University of Burgos
Viviane de Beaufort ESSEC Business School
Laura Bernardi University of Lausanne
Yolanda Beteta Complutense University of Madrid
Isabella Buber-Ennser Vienna Institute of Demography/Austrian Academy of Sciences
Josefina Bueno Alonso Université d'Alicante
Melissa L. Breger Albany Law School, Union University
Jacques Brunet-Georget Université Bordeaux III
Penny Jane Burke University of Roehampton, London
Jim Campbell Glasgow Caledonian University
Frédéric Canovas Arizona State University
Laura Ceia California State University, Long Beach
Peter Clar University of Vienna
Javier Corrales Amherst College
Anna Cotter University of Michigan, Ann Arbor
Claire Crabtree University of Detroit
Gill Crozier University of Roehampton, London
Carmen Cusack University of Alaska Southeast
Sonia De Gregorio Hurtado Technical University of Madrid
Zoe Dirse Sheridan College, Toronto
Dian Dong University of Maryland, College Park
Daniel Drache York University
Kim Anh Duong University of Waikato
Elena Falletti Carlo Cattaneo University, Castellanza
Arianne Gaetano Auburn University
Margaret Gillespie The University of Franche-Comté
Rachel Gordon Tufts University
Shelley Grant University of Washington
Sigurdur Gudjonsson University of Akureyri
Erika V. Hall Emory University
Doris Hanappi University of California, Berkeley
Sharon Hayes Queensland University of Technology
John Heath University of Vienna
Matilda Hellman University of Helsinki/University of Tampere

Susanne Hochreiter University of Vienna
Nancy Honicker Université de Paris VIII
Bobbi Hopkins University of New England, Armidale
Samantha Howe Ohio Northern University
Katherine Hunt University of Nebraska, Lincoln
Ronald C. Inglehart University of Michigan, Ann Arbor
Ronald F. Inglehart University of Michigan, Ann Arbor
Samantha Jeffries Griffith University
Ted G. Jelen University of Nevada, Las Vegas
Joan R. Kahn University of Maryland, College Park
Samantha Keefer The Ohio State University
Carolyn Kraus University of Michigan, Dearborn
Mae Kuykendall Michigan State University
Karen Larwin Youngstown State University
Nicole LaViolette University of Ottawa
Helen Lawton Smith Birkbeck, University of London
Justine Legrand Université Paris-Sorbonne
Timothy C. Lim California State University, Los Angeles
Inés Sánchez de Madariaga Technical University of Madrid
James M. Magrini College of Dupage, Glen Ellyn
Maija Majamäki University of Helsinki
Montserrat Serrano Mänes Universidad de Granada
Stefano Mengoli University of Bologna
Anne Marie Miraglia University of Waterloo
Viviana Meschitti Birkbeck, University of London
Ramey Moore University of Arkansas, Fayetteville
Mechthild Nagel State University of New York, Cortland
Barbara Nelson Michigan State University
Dzung Kieu Nguyen State University of New York, Albany
Vincenza Odorici University of Bologna
Efstratia Oktapoda Université Paris-Sorbonne, Paris IV
Arnaud Paturet CNRS, Paris
Michael A. Peters University of Waikato/University of Illinois at Urbana-Champaign
Katherine W. Phillips Columbia University
Najib Redouane California State University, Long Beach
Rabia Redouane Montclair State University
Alison Rice University of Notre Dame
Reginald Leamon Robinson Howard University School of Law
Susanne Ross Queen Margaret University, Edinburgh
Matt Ruther University of Louisville
Valérie-Anne Ryser University of Lausanne
Andrew Selth Griffith University
Anne Soronen University of Helsinki
Lucy Summers University of Queensland

April Terry Fort Hays State University
Emily Thomson Glasgow Caledonian University
SC Noah Uhrig University of Essex
Jennifer Velagic York University & Ryerson University
Christian Welzel University of Leuphana
Huike Wen Willamette University
Gregory White University of Maryland, College Park
Joan C. Williams University of California, San Francisco
Kristen P. Williams Clark University
Anna J. Willow The Ohio State University



AEIHM
Asociación Española de Investigación de Historia de las Mujeres

The Spanish Society for Women's History (Asociación Española de Investigación de Historia de las Mujeres-AEIHM) was founded in June 1991 as a development of the National Commission of the IFRWH (International Federation for Research in Women's History), federation of which it is now a member. For over twenty years, it has developed many activities in order to promote research, teaching and dissemination of women's and gender history, as well as the theoretical and methodological renewal of the historical discipline, through conferences and seminars, workshops, publications, awards, dissemination of its own and others' activities through website and mailing list and participation in collective actions. It has currently 300 members.

Its aims are to promote and spread women's and gender history through research, teaching at different academic levels, and outreaching to society at large. On an annual basis, and continuously since 1993, AEIHM has been held international conferences and seminars for discussion between national and foreign specialists in women's and gender history.

SUBMISSION INSTRUCTIONS FOR AUTHORS

Addleton journals consider all manuscripts on the condition that (i) the manuscript is your own original work, and does not duplicate any other previously published work, including your own previously published work, and (ii) the manuscript has been submitted only to our journal; it is not under consideration or peer review or accepted for publication or in press or published elsewhere. Please note that we use an anti-plagiarism software to screen manuscripts for unoriginal material. There are no submission or publication fees. Copyright will be retained by authors. As an author, you will receive free access to your article and to the journal's archive.

• All submissions should be sent to editors@addletonacademicpublishers.com and to the editor-in-chief's email address. • Manuscripts may be submitted in any standard editable format. These files will be automatically converted into a PDF file for the review process.

Peer review policy
http://www.addletonacademicpublishers.com/images/Peer%20Review%20Policy.pdf
Publication ethics and publication malpractice statement
http://www.addletonacademicpublishers.com/images/Publications%20Ethics%20and%20Malpractice%20Statement.pdf

Manuscript preparation

• Manuscripts are accepted in English. Any consistent spelling and punctuation styles may be used. Please use double quotation marks, except where "a quotation is 'within' a quotation." Long quotations of 40 words or more should be indented with quotation marks. • A typical manuscript will not exceed 8000 words including tables, references, captions, footnotes and endnotes. Manuscripts that greatly exceed this will be critically reviewed with respect to length. • Manuscripts should be compiled in the following order: title page; abstract; keywords; main text; acknowledgements; references; appendices (as appropriate). • Abstracts of 200 words are required for all manuscripts submitted. • Each manuscript should have 6 keywords. • Section headings should be concise. • All authors of a manuscript should include their full names, affiliations, postal addresses, telephone numbers and email addresses on the cover page of the manuscript. One author should be identified as the corresponding author. Please give the affiliation where the research was conducted. Please supply a short biographical note for each author, and all details required by any funding and grant-awarding bodies as an Acknowledgement on the title page of the manuscript, in a separate paragraph. • Authors must also incorporate a Disclosure Statement which will acknowledge any financial interest or benefit they have arising from the direct applications of their research. • For all manuscripts non-discriminatory language is mandatory. Sexist or racist terms must not be used.

Style guidelines: See the sample paper on the journal's webpage.

CONTENTS

PARALLEL NARRATIVES, COLORFUL VISIONS: ENCLOSURE AND LIBERATION IN TRACY CHEVALIER'S *THE VIRGIN BLUE* [11]
ARTEMIS MICHAILIDOU

STRUCTURE, AGENCY AND CURRICULAR INFLUENCES ON GIRLS' OCCUPATIONAL ASPIRATIONS: THE ZIMBABWEAN EXPERIENCES [29]
EDMORE MUTEKWE

THE IMPACT OF WITHIN-HOUSEHOLD RELATIVE INCOME ON HAPPINESS: DOES GENDER IDENTITY MATTER? [52]
QIANQIAN SHANG
WAN-HSIN LIU
YONGKUN YIN

THE CONSEQUENCES OF BLURRED BOUNDARIES BETWEEN PRIVATE AND PUBLIC SPHERES IN PATRIARCHAL SOCIETIES: EVIDENCE FROM DRUZE WOMEN IN ISRAEL [61]
EBTESAM BARAKAT
AMAL JAMAL
ORNA SASSON-LEVY

TESTING FOR DIFFERENCES BETWEEN SPANISH MEN AND WOMEN ON GENDER SELF-DEFINITION ASSESSMENT [89]
RUBÉN GARCÍA-SÁNCHEZ
CARMEN ALMENDROS
BEGOÑA ARAMAYONA
MARÍA JESÚS MARTÍN
JORGE S. LÓPEZ
JOSÉ MANUEL MARTÍNEZ

REFUSING TO SERVE LGBT PEOPLE: AN EMPIRICAL ASSESSMENT OF COMPLAINTS FILED UNDER STATE PUBLIC ACCOMMODATIONS NON-DISCRIMINATION LAWS [106]
CHRISTY MALLORY
BRAD SEARS

THE INSTRUMENTAL FUNCTION OF GENDERED CITIZENSHIP AND SYMBOLIC POLITICS IN THE SOCIAL CONSTRUCTION OF LABOR RIGHTS FOR MIGRANTS [124]
RAMONA MIHĂILĂ
ELENA GREGOVA
KATARINA JANOSKOVA
JURAJ KOLENCIK
ANNE MARIE ARSENE

WHY ARE WOMEN MORE VULNERABLE IN DEVELOPING ALZHEIMER DISEASE DEMENTIA? THE EFFECT OF GENDER ON INCIDENCE, RISK FACTORS, AND RESULTS [134]
RALUCA ANDREEA ANCA LUPU-STĂNESCU

BEYOND MASCULINITY, THE FEMALE GAZE, AND THE GREEK CRISIS: EXPLORING ATHINA RACHEL TSANGARIS'S *CHEVALIER* AND ITS PARTICULARIZING RECEPTION [141]
SOPHIE COAVOUX

GENDER STUDIES IN COMMUNICATION RESEARCH: A LONGITUDINAL ANALYSIS OF SCIENTIFIC PAPERS PUBLISHED IN SPANISH JOURNALS INDEXED IN THE JOURNAL CITATION REPORTS (JCR) AND THE SCIMAGO JOURNAL RANK (SJR) (1988–2017) [166]
BELÉN ZURBANO-BERENGUER
LORENA CANO-ORÓN
IRENE LIBERIA VAYÁ

Addleton Academic Publishers

Journal of Research in Gender Studies 8(2), 2018
pp. 11–28, ISSN 2164-0262, eISSN 2378-3524 doi:10.22381/JRGS8220181

PARALLEL NARRATIVES, COLORFUL VISIONS: ENCLOSURE AND LIBERATION IN TRACY CHEVALIER'S *THE VIRGIN BLUE*

ARTEMIS MICHAILIDOU
arorm@yahoo.co.uk
Ph.D., The University of Exeter;
Hellenic Military Academy

ABSTRACT. The following paper examines the intriguing configurations of space in Tracy Chevalier's first novel, *The Virgin Blue* (1997). Focusing on the plot's exciting, intertwining parallel narratives of two young women born four centuries apart, I will discuss the various patterns of enclosure and liberation related to "female" space as expressed through the women's mysterious visions of the color blue. From a critical standpoint that relies heavily on theories developed by Michel Foucault and Luce Irigaray, I will address issues such as the dichotomy between public and private, knowledge and power, or compliance and rebellion, in an attempt to explain why Chevalier's protagonists problematize anew the notion of gendered space. Ultimately, I argue that *The Virgin Blue* not only increases our awareness of "spatial relations," but also offers alternatives that deserve a closer look.

Keywords: contemporary women's fiction; gender; spatial relations

How to cite: Michailidou, Artemis (2018). "Parallel Narratives, Colorful Visions: Enclosure and Liberation in Tracy Chevalier's *The Virgin Blue*," *Journal of Research in Gender Studies* 8(2): 11–28.

Received 18 August 2017 • Received in revised form 20 September 2017
Accepted 21 September 2017 • Available online 15 October 2017

1. Introduction

Tracy Chevalier is perhaps best known as the author of *Girl with a Pearl Earring* (1999) and *The Last Runaway* (2013) – two novels which earned her many enthusiastic reviews, a wide readership, and the attention of Hollywood filmmakers. However, it is often an author's first novel that reveals how far she will be able to go – or, to put it differently – how much space she will be

able to travel in terms of originality, technique, and imaginative power. *The Virgin Blue* (1997) constitutes an admirable literary debut, as it introduces us with surprising skill and energy to the main subject matters of Chevalier's oeuvre: female victimization and empowerment, compliance with and transgression of stereotypical gender patterns, linguistic self-censorship, or the connection between past and present. The anonymous reviewer of the *Independent* hailed the novel's publication as "an achievement … [that] deserves an award," and the *Times* concluded that Chevalier's story is "beautifully crafted," possessing "the power to linger in the mind long after it is finished."[1] Along the same lines, Michael Harris argued that, with this work, Chevalier gained "command of the formula […] that would later win her so many fans – high-class romance in historical settings", and Thomas Haley described the novel as "engrossing."[2] Though, at a first glance, simple and easy to follow, *The Virgin Blue* explores intriguing configurations of space that range from the awkward socio-cultural associations of the gendered body to the symbolic and literal suffocation of women within their permitted domains of existence; and since it opens up new ways of problematizing the notion of "spatial relations," the *Virgin Blue* clearly deserves a closer look.

***

The novel consists of 10 chapters, each one named after a key event in the plot's development. Chapters 1, 3, 5 and 7 are narrated from a semi-omniscient point of view, and tell the story of Isabelle du Moulin, a young, 16th century French Huguenot, who was always marginalized because of her red hair (associated with Catholicism and the Virgin Mary) and her knowledge of midwifery (associated with witchcraft and forbidden knowledge). When she got pregnant by Etienne Tournier, she was forced to marry him and to stop assisting women in labor. Isabelle gave birth to two boys and one girl, and the family fled France and moved to Switzerland in the aftermath of the St. Bartholomew Massacre (1572). Once in Switzerland, Isabelle tried to symbolically escape Etienne's oppression and claim some more space for herself and her daughter Marie – her favorite child – but her husband retaliated brutally. Eventually, in a shocking act of vengeance and religious fanaticism, Etienne murders the six-year-old Marie, burying her alive under the foundations of a new chimney.

Chapters 2, 4, 6, 8, and 10 employ a first-person narration and focus on the story of Ella Turner, a young, late 20th century American who, as a result of her husband's professional aspirations, is forced to abandon her California home and move to southern France. A distant, though direct descendant of the Tournier family, Ella is a qualified midwife, but she is not licensed to practice in France. Trying to come to terms with the changes in her life,

which include unfriendly neighbors, the decision to have a baby, and the gradual estrangement from her husband Rick, Ella takes French lessons and embarks on a quest for the history of the French line of her family. Assisted by the local librarian Jean-Paul, who later becomes her lover and partner, Ella eventually adopts the original version of her surname, discovers Isabelle's and Marie's sad fates, and decides to write a novel that will both pay tribute to the victimized women of her family and enable her to make a fresh start. The climax of Chevalier's novel is arguably chapter 9, the only chapter in which the narrative voices intermingle, revealing the painful connections between the two women that drive us to the story's touching conclusion.

Central to the unraveling of this ambitious plot is the overwhelming presence of two colors: red and blue; a look at the novel's opening reveals their particular significance:

> She was called Isabelle, and when she was a small girl her hair changed color in the time it takes a bird to call to its mate.
>
> That summer the Duc de l'Aigle brought a statue of the Virgin and Child and a pot of paint back from Paris for the niche over the church door. A feast was held in the village the day the statue was installed. Isabelle sat at the bottom of a ladder watching Jean Tournier paint the niche a deep blue the color of the clear evening sky. As he finished, the sun appeared from behind a wall of clouds and lit up the blue so brightly that Isabelle clasped her hands behind her neck and squeezed her elbows against her chest. When its rays reached her, they touched her hair with a halo of copper that remained even when the sun had gone. From that day she was called La Rousse after the Virgin Mary.
>
> The nickname lost its affection when Monsieur Marcel arrived in the village a few years later, hands stained with tannin and words borrowed from Calvin. In his first sermon, in woods out of sight of the village priest, he told them that the Virgin was barring their way to the Truth.
>
> - La Rousse has been defiled by the statues, the candles, the trinkets. She is contaminated! he proclaimed. She stands between you and God!
>
> The villagers turned to stare at Isabelle. She clutched her mother's arm.
>
> How can he know? she thought. Only Maman knows.
>
> Her mother would not have told him that Isabelle had begun to bleed that day and now had a rough cloth tied between her legs and a pillow of pain in her stomach. *Les fleurs*, her mother had called it, special flowers from God, a gift she was to keep quiet about because it set her apart. […]
>
> Afterwards she walked back between her mother and her sister Marie […]. The other village children lagged behind them at first,

> whispering. Eventually, bold with curiosity, a boy ran up and grabbed a handful of Isabelle's hair.
>
> - Did you hear him, La Rousse? You 're dirty! he shouted. […]
>
> The next day Isabelle began wearing a headcloth, every chestnut strand wound out of sight, long before other girls her age.[3]

Chevalier's poetic language already establishes not only the co-existence of red and blue, but also their undeniable connection both with femaleness and with the fear of the female. Not coincidentally, the statue the village has gathered to admire depicts the Virgin and Child – a subtle comment on women's power to give and sustain life. In an uncanny way, the glorious light of the sun seems to signal nature's agreement with the Virgin's veneration and her distinguished place in Christianity; it is perhaps because of this distinguished place that the new Calvinist dogma declares her "contaminated," a dangerous obstacle which hinders communication with the new "truth." Monsieur Marcel's pivotal appearance and his stained hands – which somehow foreshadow Marie's sacrificial murder – reveal, of course, that the "truth" and, by extension, knowledge, should be seen as a manipulated, gendered space which does not permit a woman to be elevated to a position of unconditional respect. In this context, "proper" knowledge is equated with male dominance and masculinist prejudice, and the little girl whose beautiful hair once elicited admiration and aligned her with the Virgin gradually becomes an object of ridicule and physical abuse. Significantly enough, Isabelle's abuse begins precisely on the day her body declares its ability to bear children, but the "special flowers" which "set her apart" must be kept private. Thus, the life-giving power of the female body is associated with uncleanliness, and the red color becomes a token of public suspicion. In this context, Isabelle's decision to wear a headcloth that will cover her offensive, "shameful" hair should be seen both as a gesture of female submission, and as a conscious choice to keep certain kinds of knowledge inaccessible to male scrutiny and the male-controlled public space. At the same time, and within the broader framework of feminist-oriented writing, Chevalier seems to agree with theorists like Gayatri Spivak, who see the body as "the primary site of location in the world,"[4] or Rosi Braidotti, who describes it as "a culturally coded socialized entity" where the biological, the social, and the linguistic intersect. The latter has shown that this emphasis on embodiment, that is, "on the situated nature of subjectivity" allows feminists to elaborate, among other things, "strategies of subversion of cultural codes" and to refute the idea "of the neutrality of science."[5]

Indeed, the first crucial episode in the narrative plays upon the potentially subversive code of female bonding and the science of midwifery, which threatens to disrupt the established gender hierarchy and the notion of male dominance: the reader is introduced to Isabelle's apprenticeship as midwife.

The woman who is about to give birth is Isabelle's older sister, Marie, and the midwife is no other than the girls' mother, who has already figured out that the baby's head is too big and therefore unlikely to pass naturally. We learn that "Isabelle had helped her mother at birthings before, but always in the presence of other women visiting to sing and tell stories" (3). The picture of this loving universe of female bonding is complemented by Isabelle's prayers to the Virgin and to Saint Margaret: even though she feels guilty because "Monsieur Marcel had told them that [they] were powerless and should not be called upon," it is "only the old prayers" that make "sense" to her throughout the long night of her sister's labor. Just as the men in the family are exiled from the delivery room because they can only cope with "the sounds of slaughtered pigs" (3), the Calvinist preacher's words can offer no comfort. However, the unfortunate death of Marie and her female baby will be used against Isabelle by the male community, and her skills in midwifery will be eventually equated with witchcraft.

Needless to say, of course, that such an equation is far from innocent: on the contrary, Isabelle's vilification, first by Monsieur Marcel and later by her husband Etienne, purposefully distorts the very essence of the Christian religion: as Nancy Sullivan reminds us, the midwife is mentioned both in the Book of Genesis (35:17) and in the Book of Exodus (1:20); the latter, in particular, states that "God dealt well with the midwives: and the people multiplied, and waxed very mighty."[6] Along the same lines, Kontoyannis and Katsetos argue that the early Catholic Church in Western Europe "encouraged midwives' public role," and that midwives gained public recognition "through the administration of emergency baptisms and reporting in courts for illegitimate births, premature births and infanticide."[7] Since, in the *Virgin Blue*, the Tournier family was the only one actually possessing a Bible in the village, and since Monsieur Marcel is clearly portrayed as the new authority on the religious truth, this selective distortion of God's all-encompassing, loving message is particularly disturbing. It reveals that religious orthodoxy can be manipulated in order to restrain women such as midwives, whose knowledge includes magical or mysterious aspects unintelligible to most people, and whose actual or potential involvement in public affairs is deemed undesirable and even threatening to the established patriarchal order.[8] We must also bear in mind that, up until the 17th century, "the image of women-healers as witches was deliberately constructed by Church authorities, in collaboration with male physicians, to disgrace women's powers," and that the time frame of Chevalier's novel coincides with the rising fame of Ambroise Paré (1510–1590), an eminent French surgeon who encouraged "male attendance in childbirth, first in 'extraordinary' cases and later in routine ones."[9] Moreover, just a few years later (around 1630), the Chamberlens, a French Huguenot family, invented the first forceps – to be used exclusively by men – eventually

usurping the midwife's role in childbirth.[10] It comes thus as no surprise that, as Kontoyannis and Katsetos put it, this period resulted "in a revolution of medical practice and subsequently a change of gender interaction,"[11] which marked several transgressions in the division of labor and a crucial intermingling of socio-spatial dichotomies.

If, then, both institutionalized religion and the externally imposed sanctions on Isabelle's vocation are the dominant patterns of enclosure in Chevalier's novel, can marriage into a respectable family absolve a young woman from the dubious accusations that surround her, and provide a better space for her personal development? The answer is definitely negative. Far from representing acceptance, absolution, or upward social mobility, Isabelle's marriage to Etienne Tournier is depicted as a literal and symbolic suffocation. From her subordinate, unrecognized role in the functioning of the household to the imposed migration to a different country, and from being forced to pluck her child's red hairs to the actual loss of this child, Isabelle's experience of family life and the domestic spatial system is characterized exclusively by submission and victimization. We should also remember that Etienne's initial appearance in the narrative is inseparable from the desecration of the village's Catholic chapel; Etienne is the person who hands Isabelle a rake, demanding that she destroy the statue of the Virgin, and the cruelty that characterizes this scene prepares the reader for the violence within the Tournier household:

> Metal hit stone with a dull clung and the face of the Virgin was sliced off […]. I can't do it again, Isabelle thought, but the sight of the red faces made her swing once more. The statue began to rock, the faceless woman rocking the child in her arms. Then it pitched forward and fell, the Virgin's head hitting the ground first and shattering, the body thumping after. In the impact of the fall the Child was split from his mother and lay on the ground gazing upward. Isabelle dropped the rake and covered her face with her hands. There were loud cheers and whistles and the crowd surged forward to surround the broken statue.
>
> When Isabelle took her hands from her face Etienne was standing in front of her. He smiled triumphantly, reached over and squeezed her breasts. Then he joined the crowd and began throwing dung at the blue niche.
>
> I will never see such color again, she thought. (9)

Exploiting Isabelle's fear of social rejection, Etienne – a clear specimen of what the Australian sociologist Raewyn Connell has called "hegemonic masculinity"[12] – forces his future wife to do something that is totally against her will. Furthermore, even before being "legitimized" by the institution of marriage, he is eager to assert his dominance over Isabelle's body by publicly

squeezing her breasts. The same pattern of psychological blackmailing and corporeal punishment will be retained throughout the couple's marriage, without a shift in the roles of victim and victimizer. Etienne, essentially, requires that his wife become nothing less than a "faceless woman," and the destruction of the blue niche represents the establishment of a new, "colorless" spatial reality that will gradually stifle Isabelle's individuality.

This new reality becomes particularly unbearable in Switzerland, the supposedly "free" and "liberating" space in which the Tourniers finally settle. The "draughty and damp" stone house with the low ceiling resembles a prison; everything in it is "covered with a layer of soot", and the air becomes "dark and stuffy whenever windows and doors [are] closed" (132). Never allowed to be alone, Isabelle is always forced to stay indoors and endure the constant surveillance of her husband, eldest son, or mother-in-law. The house, in other words, where Isabelle is always visible and thus unable to interact with the community and "disgrace" her family, clearly corresponds to the Foucauldian notion of the camp, whose underlying principle was "the spatial 'nesting' of hierarchized surveillance."[13] It symbolizes an architecture purposefully build

> to permit an internal, articulated and detailed control – to render visible those who are inside it; in more general terms, an architecture that would operate to transform individuals: to act on those it shelters, to provide a hold on their conduct, to carry the effects of power right to them, to make it possible to know them, to alter them. Stones can make people docile and knowable.[14]

Chevalier's unraveling of the plot reveals both the writer's agreement with the importance Foucault attributes to space – which is "fundamental in any exercise of power"[15] – and her endorsement of the above connection between architecture and the docile body – which becomes "useful" only if it is both "productive" and "subjected."[16] Indeed, Isabelle's body, perpetually enclosed within the stone walls of a hostile environment, becomes not only "docile" and "subjected," but also – again in Foucauldian terms – "delinquent":[17] red patches begin to appear on her skin when she feels most unhappy – a subtle comment on the somatization of psychological abuse – and, as a form of punishment, Etienne begins to employ anal rape. Isabelle, though pregnant, often refuses food – a decision that recalls Sarah Sceats's perceptive observation concerning the "ambivalent" (simultaneously powerful and disempowering) maternal role in western society, and the symbolic significance of eating in relation to "the boundaries between self and world."[18] In addition, Isabelle also begins to speak less, in order to avoid infuriating her husband further: "She felt she was shrinking, that if she kept quiet she might become less visible, and be able to escape the suspicion entrapping her, the nameless threat hanging in the air" (185).

This "nameless threat," unfortunately, will soon materialize, culminating in the brutal murder of Isabelle's only daughter, Marie. Interestingly enough, Marie's death is associated both with her father's religious fanaticism, and with the traditional partitions of the domestic space, which restrict women's primary function within the kitchen. Etienne Tournier, assisted by his neighbor Gaspard, and with the silent consent of his mother and eldest son, decides to bury Marie alive under the newly ordered granite that would be used for the construction of a chimney. The pretext of Etienne's infuriation with his youngest child was the color of the new underdress she wore to Church – blue. Etienne feels that Marie's death will atone for the shame that Isabelle has brought upon his family by allowing their daughter to wear such a "blasphemous" color – which binds her, in Foucauldian terms, to an unacceptable system of religious significance. He is also convinced that he will prevent his wife from defying him again in the future by inflicting on her the most painful punishment imaginable. After all, as E. Lundgren has shown, "gendered religious ideologies" are often used by men "to justify their violence against female partners."[19] The real reason, however, is that, despite his repeated invocation of the "authentic" religious truth, Etienne still believes in old, paganistic customs which demand that a living person be buried under the foundations of a new chimney, so that the household will enjoy peace and prosperity. Isabelle thus discovers in the most traumatic manner the family secret Etienne and his mother Hannah allude to throughout the narrative, or, to use their own words, the special "magic" that accompanied the old Tournier farm. Both literally and symbolically, the domestic becomes not only the space that exposes religious hypocrisy – notice that Etienne kills his daughter on Good Friday – but also the ultimate space of female suffocation, enclosure, and victimization.

Thus, the punishment of mother and daughter and, most importantly, the chimney that becomes their burial place, recall not only the earlier, mandated destruction of the statue of the Virgin and Child, but also the concept of an architecture that effaces both women and femininity, simultaneously denying women's corporeal autonomy and social value.[20] Indeed, the Tournier chimney is directly analogous to Luce Irigaray's notion of the "sepulchre" – in other words, to the death-like tomb that signals the male domination of the female body and the male attempt to usurp "the maternal space from which all subjects emerge."[21] Elizabeth Grosz's analysis of Irigaray's argument provides a useful frame of reference; as Grosz writes, according to the French feminist philosopher,

> Men produce a universe built upon the erasure of bodies and contributions of women/mothers and the refusal to acknowledge the debt to the maternal body that they owe. […] This appropriation of the right to a place or space correlates with men's seizure of the

> right to define and utilize a spatiality that reflects their own self-representations […]. The containment of women within a dwelling that they did not build, nor was ever built *for* them, can only amount to a homelessness within the very home itself: it becomes the space of duty […], the space of domestic violence and abuse, the space that harms as much as it isolates women.[22]

The Tournier chimney becomes the epitome of this bleak world of unredeemed female sacrifice, and the question that arises, then, is whether Chevalier ever allows her female protagonist to see a ray of hope; surprisingly, perhaps, the answer is affirmative: Isabelle always cherishes the memory of Paul, a young shepherd who used to watch her bathe naked in the river of her home village in France. In the presence of Paul, Isabelle experiences an uplifting sense of spiritual and physical liberation: she feels she can expose both her naked body and her red hair, without feeling guilt or remorse. And it is in the presence of Paul that Isabelle, pregnant with her only daughter, decides to defy her husband and name the baby Marie, if it's a girl. "I will fight everyone to name her that," she vows to the Virgin (22). Several chapters later, we learn how Isabelle managed to do it:

> She had threatened to put a curse on their crops if [Etienne] didn't let her name the baby Marie. In all the years she had been with the Tourniers, it had been the only time she dared use their fear of her. Now that fear was gone; instead there was anger. (192)

Prepared to suffer the consequences, Isabelle appears to understand the strong link between naming and the sense of an autonomous identity: she gives her daughter the name of the Virgin and of her dead sister, thus paying tribute to the loving world of female bonding and the rewarding experience of midwifery that she was forced to abandon. Moreover, in a further act of defiance, she tries to differentiate herself from the Tournier family in Switzerland and introduces herself with her own maiden name to the travelling peddler that brings her news of her home village and of the shepherd Paul.

In fact, Isabelle's acts of defiance – no matter how feeble or, eventually, self-defeating – are connected with women's need to reclaim both their corporeal integrity and the usurped maternal space: from enjoying the freedom to worship the Virgin and the female saints to keeping her daughter's plucked red hairs, and from assisting her raped neighbor Pascale to miscarry to buying a forbidden blue cloth, Isabelle's effort to define and defend a distinctive, inviolable field of action for herself and her daughter is particularly moving. Even when she loses the silent battles she fights with Etienne, she shows that "there will always remain some part of 'woman' which resists masculine imprinting and socialization."[23]

What needs to be clarified, then, as we come to the conclusion of her story, is whether Isabelle leaves anything substantial behind – something that can symbolize both empowerment and endurance. The answer seems rather obvious: the Virgin blue cloth. Throughout the narrative, and in a subtle manner that recalls Gilles Deleuze's notion of becoming – which stresses the positivity of difference through a process of continuous transformation[24] – the blue color constantly acquires new significations: it is the color of the Virgin Mary's dress, the color of supernatural, unintelligible beauty, the forbidden token of female power and the symbol of female bonding, the color of victimization, enclosure and suffering, the symbol of male fear and masculinist bias; ultimately, however, the Virgin blue is the color that resists forgetfulness: it is the only thing that keeps Isabelle going and the only bridge between a troubled past and a more hopeful future. And, as we will see in Ella Turner's narrative, it is ultimately the color that represents resilience and survival.

At a first glance, Ella's story seems distinctly different: the engaging account of the young, happily married Californian who is about to experience the great French adventure shares little in common with the austere and humorless chapters of the dark tale which unfolds against the backdrop of Calvinism.[25] A closer look, however, reveals that Chevalier chooses to begin with the superficial differences in order to gradually emphasize the substantial similarities, and the deceptively lighter tone and confessional language she employs in order to achieve the desired effect is yet another proof of her skill.

The first noticeable difference is Ella's ostensibly successful marriage: the cheerful, easy-going, and sociable Rick Middleton, who is liked by everyone in the provincial French town, does not recall in any way the cold and violent Etienne Tournier. In fact, not only does Rick feel proud of Ella, but he also tries to comply with most of her wishes: when, for instance, they decide to try for a baby, he gracefully defers to Ella's judgment, recognizing that she, being a midwife, knows what is best. When the latter requests that they make love less often, Rick's reply can only elicit respect: "You know more about his than me. […] I'm just the hired gun. You tell me what to do" (34). Such a pronouncement is particularly meaningful in the context of contemporary gender theory, with Chevalier implying that the male body is as much a space of constructed socio-biological expectation as the female. Questioning the pervasive stereotypes of masculine strength and feminine docility, she creates an alternative domestic arrangement in which the male body's function is constantly being assessed, and in which the privilege of judging, of declaring a function "successful" resides in the female partner.

This does not mean, of course, that the couple's relationship is ideal, or that Rick stands for the perfect husband: on the contrary, he often feels repulsed by his wife's body (carefully avoiding to touch or kiss the spots

affected by Ella's stress-induced psoriasis), he's not a very good listener, and he tries to make fun of Ella's worries associated with fitting in, with cross-cultural politeness, or with the importance of knowing your family roots. However, it does suggest that a gifted writer's fictional universe is never black-and-white and that, in the 21st century, oversimplified distinctions of male dominance versus female submission cannot provide a satisfactory answer to the complex debates regarding gender and the various transgressions related to the domestic or public space. Rick does not have to be a brute in order to fail Ella's expectations, and the latter carefully refrains from blaming the growing gap between them on her husband's shortcomings. The graphic language with which Ella sums up the situation attests to the sophistication of Chevalier's writing, simultaneously implying that the reasons behind a failing marriage are often symbolic, rather than pragmatic:

> Then it happened: like one of those one-cell creatures under the microscope that for no apparent reason suddenly divides into two, I felt us pulling apart into distinct entities with separate perspectives. It was strange: I hadn't realized how together we'd been until we were far apart. (153–154)

Chevalier does not give us an explicit reason for this split, but she does give us several hints which indicate Ella's discomfiture with her marriage. Quite early on, for instance, Ella fills out a membership application form at the local library, stating that her last name is "Tournier," rather than "Turner." This apparently trivial gesture signals that Ella will soon embark on a quest for a more meaningful identity and that her husband's last name feels totally alien; after all, it is only half way through the narrative that we actually learn Rick's last name, and this is by chance, when the latter's secretary mistakenly addresses Ella as "Madame Middleton" (117). Ella's response ("I'd given up explaining to her that I hadn't taken Rick's name") is both a declaration of independence, and a realization that her personal space seems somehow violated by the social assumptions attached to marriage. Moreover, in a rather deceptive way, Ella's admission that she has "given up explaining" may align her with Isabelle's voluntary silence, but it soon becomes clear that the younger woman is more than capable of defending her ground. In fact, hence-forward, Ella will be increasingly opting for direct verbal confrontation, rather than silent submission – even in French, the language she feels less comfortable with. Unlike Isabelle, who is forced to associate silence with safety and self-protection, Ella understands that silence represents only defeat and frustration. Once she begins to speak her mind, she gains new admirers, and France no longer feels hostile or foreign. And it is Ella's willingness to communicate and fit in that will eventually help her discover the dark secret of her French ancestors and enable her to transform her life.

But what was the initial incentive of Ella's transformation? Predictably enough, the Virgin blue color that appears in her dreams, beginning the night she and Rick decided to start a family:

> Something did change that night. That night I had the dream for the first time. It began with flickering, a movement between dark and light. It wasn't black, it wasn't white; it was blue. I was dreaming in blue.
>
> It moved like it was being buffeted by the wind, undulating toward me and away. It began to press into me, the pressure of water rather than stone. I could hear a voice chanting. Then I was reciting too, the words pouring from me. The other voice began to cry; then I was sobbing. I cried until I couldn't breathe. The pressure of the blue closed in around me. There was a great boom, like the sound of a heavy door falling into place, and the blue was replaced by a black so complete it had never known light. (32–33)

This sudden, inexplicable appearance of the same color that defined Isabelle's life makes us suspect that the latter, though long dead, might be leading Ella toward a meaningful personal revelation;[26] the two voices chanting, and then sobbing in synchrony give us a beautiful, metaphysical image of the connection between present and past, simultaneously underlining the crucial role of female boning. However, the emphasis on pressure and suffocation suggests that something ominous has happened and, at this stage, Ella associates the vivid blue color exclusively with sadness and mystery.

The superficial side of the mystery will soon become evident: the blue nightmare disappears once the couple agrees to take a break from the baby-making ritual – an intriguing indication of the color's connection with enforced decisions and undesirable sexual contact. The blue vision's subtext of bonding will also bring together Ella and Jean Paul, since the latter is actually the first person that inspires Ella to share her thoughts, and he's the one that identifies the strange words she recites in the dream as Psalm 31 from the Bible. Furthermore, Jean-Paul's genuine involvement gives Ella the courage to speak to Rick about her frustration, and though she finds her husband's response disheartening, she becomes more receptive to all the new possibilities this dream opens up:

> That night we made love, Rick carefully avoiding my psoriasis. Afterwards I lay patiently waiting for sleep and the dream. When it came it was less impressionistic, more tangible than ever. The blue hang over me like a bright sheet, billowing in and out, taking on texture and shape. I woke with tears running down my face and my voice in my ears. I lay still.
>
> "A dress," I whispered. "It was a dress." (56)

The increasing psychological distance between the couple is artfully sketched in this repeated foregrounding of an "offensive" – or, in Foucauldian terms, "delinquent" female body – that requires special handling even during the most intimate interpersonal act. Mirroring Etienne Tournier from the reverse angle, Rick begins to represent for Ella an alien space that implicitly assigns her to a specific, non-negotiable function: that of the future mother who has to give up her own professional ambitions, raise her children, and maintain, of course, a desirable female body. The lucidity with which she is now able to discern a dress behind the overwhelming blue presence is both a clear symbol of a socially constructed, oppressive femininity, and a definite sign of Ella's determination to look for alternative self-definitions and family spaces.

Thus, Ella (whose hair has been mysteriously turning red) goes to meet her distant cousins in Switzerland – Jacob Tournier and his daughter Susanne. To her surprise, she discovers that the latter – currently trying to cope with an unplanned pregnancy – wants to hear more about the dream; this is how Ella describes her blue vision shortly before the revelation of the truth:

> "It has two parts: there's a clear blue, the top layer, full of light and" – I struggled for words. "It moves with the light, the color. But there's also a darkness underneath the light, very sombre. The two shades fight against each other. That's what makes the color so alive and memorable. It's a beautiful color, you see, but sad too, maybe to remind us that the Virgin is always mourning the death of her son, even when he's born. Like she knows already what will happen. But then when he's dead the blue is still beautiful, still hopeful. It makes you think that nothing is completely one thing or the other; it can be light and happy but there is always that darkness underneath."
>
> I stopped. We were both quiet.
>
> Then she said, "I have had the dream too." (277)

Susanne's assertion that she's having the very same dream underlines not only the connection between the Virgin blue and female bonding, but also the unique experience of motherhood as a privileged and yet ambivalent social space. The young woman's admission that she feels both "happy and sad at the same time" emphasizes precisely this ambivalence, and suggests that the final truth will include both suffering and solace.

Indeed, the climactic episode takes us to the abandoned Tournier farm, where both women are immediately affected by its sinister atmosphere. As Ella puts it, "I couldn't explain why I didn't want to go inside; after all, we had come here for my sake. I could feel Susanne looking at me helplessly, as if I were the only one who had to stop everything. It was like we were being dragged inside by a cool logic we couldn't fight" (237). However, in an uncannily metaphysical way, the very sight of the old chimney where Marie's

sacrifice took place causes Susanne to miscarry – an interesting comment on women's parallel experiences of loss throughout the centuries. At the same time, Susanne's loss is also inseparable from Ella's gain – or, to be more specific, from the realization that she can no longer compromise with the absence of her chosen profession – midwifery – from her life: notice the unambiguous language of Ella's reaction when confronted with Susanne's bleeding:

> For a second I panicked. Holy Mother, I thought, what do I do? Then I had a sensation I hadn't felt in months: my brain switched over to automatic, a familiar place where I knew exactly who I was and what I had to do." (238)

Ella's invocation to the "Holy Mother" serves a double purpose here: on the one hand, it aligns the younger woman with her ancestor, drawing attention to their common religious faith and knowledge of midwifery; on the other hand, however, it restates Chevalier's agreement with Irigaray's view concerning the usurped maternal space. Ella's reclaiming of midwifery in the above extract – her own, familiar space she had been forced to neglect – is presented as a return "to the most primordial of all spaces,"[27] to the only space where Ella can be herself. At the same time, through her female protagonist, Chevalier seems to be endorsing both the Foucauldian approach to power – which presupposes intimate knowledge of the body "in order to remain effective and 'in play'," and the Nietzschean approach to knowledge as "a drive for mastery," a "practice" rather than "contemplative reflection."[28] Ella's sudden epiphany, the realization that it is only through midwifery that she will be able to enjoy a fully autonomous identity, demonstrates precisely this drive for mastery, for acquiring control over the scientific and social space she associates with growth and empowerment. And it is this rewarding sense of personal empowerment that enables Ella to return to the bleak Tournier farm the very next day and uncover the chimney's sinister mystery.

Curiously enough, Ella's final encounter with the sight of the atrocious crime reminds her of Rick; unable to make sense of the dysfunctional location of the chimney within the old household, Ella thinks that "Rick would be able to explain this. This is his territory, these interior spaces" (256). And if this parallel between the violent Etienne and the self-absorbed Rick appears somewhat strained, it should have become clear by now that Ella, like Isabelle, subconsciously equates marriage with enclosure, with interior spaces and externally imposed social functions, with self-effacement and silent endurance. This is probably why the actual discovery of Marie's bones, teeth, and red hair under the chimney's stone will traumatize her so much: pressing her forehead against the cold granite, she will recite the same French prayer that Isabelle had recited four centuries earlier, and, like her ancestor, she will also

lose consciousness. But Ella's loss of consciousness is as much related to her traumatic experience in the Tournier farm as it is to her newly discovered pregnancy: we have consistently seen several times that the blue dream stands for both extreme sadness and extreme happiness, and the realization of victimization in the past goes hand-in-hand with resilience in the present; after all, Ella manages to rescue a long thread of the blue dress – a solid token of survival: the survival of beauty, truth, female bonding, and mother-child love. Once Ella gains possession of this Virgin blue thread, the child inside her makes its presence known, and the symbolism of the unique blue color emphasizes life and liberation, rather than death and enclosure.

Having discovered the truth about her family's past, Ella is ready to return to France and make a new start. Her transformation includes the increasing awareness of her love for this initially hostile country and its unfriendly people; as Michael Harris puts it, Ella discovers that the French "are like the Cevennes chestnuts from which Isabelle made bread: prickly on the outside but well worth the cracking."[29] In the supportive company of Mathilde, yet another librarian who stands by Ella throughout the narrative, and accompanied by Jean-Paul and Mathilde's little daughter, Ella is finally able to give Marie a proper burial and leave the past behind her.

The only thing that remains, then, is to communicate the news of her pregnancy to Rick (the baby's father), and to inform him of her decision to leave him. Unlike Isabelle, whose pregnancy forced her to marry Etienne, and whose love for the shepherd Paul was never consummated, Ella understands that her pregnancy is precisely the factor that can liberate her from an unsatisfactory marriage. To put it differently, Ella decides to experience the Foucauldian approach to "liberty as a *practice*", having understood that, no matter how oppressive a given system may be, "there always remain the possibilities of resistance, disobedience, and oppositional groupings."[30] Henceforward, Ella will enjoy life next to the man that introduced color in it, both literally and symbolically. In short, as Harris argues, "Ella herself becomes French, or reclaims the Frenchness within her. It's a startling transformation. From the shy, uncertain woman she is at the beginning, breaking out in psoriasis from stress, paralyzed by village gossip, certain her clothes and makeup are all wrong, she turns into an adventurer."[31] And she is now fully able to experience the great adventure of self-expansion in the very country that made this possible. This is why Rick's suggestion that they move to Germany and start over seems like an unreasonable usurpation of her personal, hardly gained but wholly deserved space. Ella is no longer willing to conform either to the "spatial duties" of marriage (which imply that she follow her husband to his own chosen space), or to the still dominant stereotypes concerning the upbringing of children (which dictate that a woman remain in a loveless marriage if she's expecting a baby). Ella's decision to abandon Rick

for Jean-Paul suggests that she can envision an alternative, happier family space that goes beyond stereotypical notions of feminine properness and domestic hierarchies. Paying, once again, tribute to Luce Irigaray, who argued that "the reconceptualization of the relationships between men and women […] entails the reconceptualization of the representations of space and time,"[32] Chevalier creates a 21st century protagonist who tries to renegotiate both the ways in which female subjectivity should be constructed, and the ways in which space can be explored and occupied; and, as Ella finally concludes, the most rewarding exploration of space has nothing to do with "the logic of penetration, colonization, [or] domination."[33]

Conclusion

With *The Virgin Blue*, Chevalier cleverly interrogates traditional perceptions of space and opens up other alternatives for remapping this challenging field in relation to identity and self-definition; this is perhaps why the book that Ella is writing at the end – the book that honors the victimized women of her family – is doubly important: first, because it stresses Irigaray's notion of a "feminine syntax" that rejects ownership and appropriation[34] and, secondly, because it leaves the fate of Isabelle entirely open. By allowing Isabelle a different, happier fate, Ella stresses in no uncertain terms the author's conviction: namely, that the relationship between gender and space is constantly being refashioned, and that the possibilities of escaping prescribed uses (or abuses) of space are as infinite, as they are colorful.

NOTES AND REFERENCES

1. Anonymous reviews in *The Independent* (1 February 1997), http://www.tchevalier.com/thevirginblue/reviews/independent.html and *The Times* (9 November 2002), http://www.tchevalier.com/thevirginblue/reviews/times.html.

2. Harris, Michael (29 June 2003), review in *The Los Angeles Times*, http://www.tchevalier.com/thevirginblue/reviews/latimes.html, and Haley, Thomas (3. August 2003), review in *The Chicago Sun-Times*, http://www/tchevalier.com/the virginblue/reviews/suntimes.html.

3. Chevalier, Tracy (2002; originally published 1997), *The Virgin Blue*. London: Harper Collins, 1–2. Parenthetical references hereafter correspond to the above edition.

4. Spivak, Gayatri (1987), *In Other Worlds*, as mentioned by Rosi Braidotti (1994) in *Nomadic Subjects: Embodiment and Sexual Difference in Contemporary Feminist Theory*. New York: Columbia University Press, 238.

5. Braidotti (1994), 238.

6. Sullivan, Nancy (2013), "A Short History of Midwifery," http://www.midwifeinsight.com/articles/a-short-history-of-midwifery/

7. Kontoyannis, Maria, and Katsetos, Christos (2011), "Midwives in Early Modern Europe (1400–1800)," *Health Science Journal* 5(1): 31–36 (32); available at http://www.hsj.gr/volume5/issue1/515.pdf

8. See Kontoyannis and Katsetos, 32, and Sullivan, as in reference note 6. For a more detailed discussion of religion as an institution "that often enforces gender differences and inequality," see also Spade, Joan Z., and Valentine, Catherine G. (eds.) (2011), *The Kaleidoscope of Gender: Prisms, Patterns, and Possibilities*, 3rd edn. London: Sage, 479–480.

9. Anonymous, "The Office of Midwife: Some Historical Background" (n.d.), http://www.nursing.manchester.ac.uk/ukchnm/midwives/officeofmidwife.pdf; see also Kontoyannis and Katsetos, 32.

10. See the BBC documentary (2012), entitled "Harlots, Housewives & Heroines: A 17th Century History," presented by Lucy Worsley, directed by Nick Gillam-Smith, *BBC Television*; available at http://www.youtube.com/watch?v=NOICUUDbpy4. Although transcultural and transhistorical comparisons cannot be made, the fact that, in England, midwives traditionally wore a long red cloak adds an interesting dimension to the discussion of color-coded domains.

11. See Kontoyannis and Katsetos, 31.

12. In Connell's definition, hegemonic masculinity is "the pattern of practice (i.e. things done, not just a set of expectations or an identity) that allow men's dominance over women to continue"; see Connell, R. W., and Messerschmidt, J. W. (2005), *Gender and Society* 19(6): 829–859 (832); cited by Spade and Valentine, xvi. As Spade and Valentine argue, "the subordination of women … and the celebration of toughness and competitiveness" constitute key features of this type of masculinity, and although hegemony should not be equated with violence per se, it relies heavily "on the ascendancy achieved through culture, institutions, and persuasion" (xvi).

13. Foucault, Michel (1975), *Discipline and Punish*; extract cited by Paul Rabinow, (ed.) (1991), in *The Foucault Reader: An Introduction to Foucault's Thought*. London: Penguin, 190.

14. Ibid., 190.

15. Ibid., 252.

16. Ibid., 175–182.

17. See Elizabeth Grosz's reference (1995) to Michel Foucault's *The History of Sexuality*, Vol. 2 (1985), in *Space, Time, and Perversion: Essays on the Politics of Bodies*. London: Routledge, 35.

18. Sceats, Sarah (2000), *Food, Consumption and the Body in Contemporary Women's Fiction*. Cambridge: Cambridge University Press, 1–11.

19. See E. Lundgren's "The Hand that Strikes and Comforts: Gendered Construction and the Tension between Body and Symbol" (1998), cited by Anderson, Kristin L. and Umberson, Debra (2011), "Gendering Violence: Masculinity and Power in Men's Accounts of Domestic Violence," in *The Kaleidoscope of Gender*. Joan Z. Spade and Catherine G. Valentine (eds.). 3rd edn. London: Sage, 508–517 (508).

20. For a more detailed discussion of this issue, see the excellent chapter entitled "Women, Chora, Dwelling," in Grosz's *Space, Time, and Perversion*, 114–124.

21. See Luce Irigaray's *Speculum of the Other Woman* (1985), as mentioned by Grosz, 122.

22 Grosz, 121–122; original emphasis.

23. See Diana Fuss's (1989) reading of Irigaray in *Essentially Speaking: Feminism, Nature and Difference*. London: Routledge, 61.

24. See Braidotti's reading of Deleuze in *Nomadic Subjects*, 111.

25. Anonymous, review in *The Irish Times* (16 November 2002), http://www.tchevalier.com/thevirginblue/reviews/irishtimes/html; see also Haley, as in reference note 2.

26. Ibid.

27. See Grosz's reference to Irigaray's *Elemental Passions* (1992), in *Space, Time, and Perversion*, 121.

28. See Grosz's discussion of the above philosophers in *Space, Time, and Perversion*, 32–37.

29. See also Harris, as in reference note 2.

30. See Michel Foucault's interview to Paul Rabinow, entitled "Space, Knowledge, and Power," in *The Foucault Reader*, 239–256.

31. Ibid., 245.

32. As previously, I am indebted to Grosz's analysis of Irigaray's writings in *Space, Time, and Perversion*, 120.

33. Ibid., 121.

34. Luce Irigaray (1985), *This Sex Which is Not One*. Trans. Catherine Porter and Carolyn Burke. Ithaca, NY: Cornell University Press, 134. Originally published 1977.

Addleton Academic Publishers

Journal of Research in Gender Studies 8(2), 2018
pp. 29–51, ISSN 2164-0262, eISSN 2378-3524 doi:10.22381/JRGS8220182

STRUCTURE, AGENCY AND CURRICULAR INFLUENCES ON GIRLS' OCCUPATIONAL ASPIRATIONS: THE ZIMBABWEAN EXPERIENCES

EDMORE MUTEKWE
edmore.mutekwe@nwu.ac.za/emutekwe@yahoo.com
Faculty of Education and Training,
School of Professional Studies in Education,
North West University (Mafikeng Campus)

ABSTRACT. The goal of this study was to unmask the gendered nature of the Zimbabwean school curriculum showing how structure, agency and the curriculum impact on girls' career aspirations by predisposing them towards particular occupations. In pursuit of this aim an exploratory sequential mixed methods research design genre was adopted with a total sample size of 20 participants, comprising sixth form school girls and an equal number of high school teachers, who were purposefully and systematically sampled from four schools in the greater Harare Education district. The data were gathered through qualitative focus group discussion interviews (FGDI) and the quantitative structured closed-ended questionnaire from the girls and the school teachers respectively. Data analysis involved a thematic approach coupled with statistical summary tables, frequency counts and percentage convergences of phenomena. Reporting the findings entailed both thematic and descriptive statistical approaches with the themes emerging from the coding process being classified into code families that formed the basis of the presentation and discussion of findings. Key findings included that despite longstanding debates and the re-enactment in 2014 of the National Gender Equity Policy in Zimbabwe, the problem of gender inequity in education and occupation is far from being resolved. The chief conclusion was that the school curriculum continues to reproduce gender disparities through teacher attitudes and expectations of their pupils' gender. Curricular material used in schools also compound the gender role biases, ideologies, stereotypes and prejudices culminating in the polarization of not only the school subjects but also the occupational trajectories along gender lines. The recommendations made included that teachers need to play an important role in closing the ranks created by the gender role stereotyping of girls in the home and those incorporated in the school curriculum through teacher attitudes and expectations and all other facets of the hidden school curriculum.

Keywords: hidden curriculum; masculinity; femininity; gender role stereotypes

How to cite: Mutekwe, Edmore (2018). "Structure, Agency and Curricular Influences on Girls' Occupational Aspirations: The Zimbabwean Experiences," *Journal of Research in Gender Studies* 8(2): 29–51.

Received 7 November 2017 • Received in revised form 30 December 2017
Accepted 4 January 2018 • Available online 25 January 2018

Introduction and Background to the Study

In Zimbabwe currently industry and commerce are predominantly the domain of men, who own most businesses in virtually all sectors (Chengu, 2016). The level of women's participation in industry, commerce and business entrepreneurship continues to be unacceptably low. As it stands, black women who suffered the double-edged discrimination as women and as black people, have not been sufficiently prioritized in the various spheres of the society such as in education and the economy. Prior to colonization, the significant value of Zimbabwean women's productive labor in producing and processing food created and maintained their rights in domestic and other spheres – political, cultural, religious or social (Mawarire, 2017).

However, with the creation of the colonial economy came the marginalization of the position of the majority of women, in several ways: firstly, the advent of title deeds made men the sole owners of land. Women could not hold title deeds since they were considered minors and part of the property owned by men (Chengu, 2016). Consequently, as women lost access and control of land they became increasingly economically dependent on men. This in turn led to an intensification of domestic patriarchy, reinforced by colonial social institutions such as the labor market. Secondly, as colonialism continued to entrench itself on the Zimbabwean soil, the perceived importance of girls and women's agricultural contribution to the household was greatly reduced, as their vital role in food production was overshadowed by more lucrative male-dominated cash crop cultivation for the international market (Dorsey, 1989; Marira, 1991). Finally, the introduction of wage labor affected girls and women by uprooting boys and men from villages to work in urban areas causing both negative social and economic impact on women. They were not considered worth of any wages from their village duties because all proceeds belonged to their husbands since they were part of men's property by virtue of the *lobola* paid for them (Gordon, 2003). Three and half decades after independence the occupational structure is still mired in the transitional problem of creating an equitable environment in which girls and boys or men and women can express their autonomy in career choices across all sectors of their economy. When brute strength mattered more than

brains, men had an inherent advantage and now that brainpower has triumphed, the two sexes are more evenly matched (Mavhunga, 2006). However, gains in women's economic opportunities continue to lag behind, especially in matters of agency (Oakley, 2011) in terms of career choices within their social structures. It is misgivings such as these that have led Tsvangirai (2014) to argue that since the 1980 independence, the extent to which the colonial economic system created conditions for the exploitation of girls and women's labor and dependence on men in Zimbabwe has not been adequately addressed.

From as early as the first grade, learners are often asked about their future occupational aspirations and the way they often answer this question reflects societal biases typical of their backgrounds (Gordon, 1994). Their responses to the aforementioned question also epitomize the influence of early gender role socialization especially in the African social structures. No wonder Giddens (2010) asserts that sometimes it is the influence of structure and not necessarily the children's agency that determines their curricular choices and ultimately their career choices. Analyzed from a structure and agency perspective, the children's responses to the question of their occupational aspirations further reflects the gendered nature of their society (Giddens, 2010). It would be considered strange for a young Zimbabwean girl in the early primary school or even early secondary school to publicly state during classroom practice that she would want to pursue building or heavy vehicle driving upon completion of her schooling. Similarly, a young boy would be an object of ridicule if he were to state in school that he wishes to become a nurse or a pre-school teacher upon completion of his schooling. Seen in this light, it follows therefore that many girls in schools simply disregard certain career fields in their life because of stereotypical views held by members of their society (Gaidzanwa, 2012). It is in this sense that Momsen (2012) asserts that according to the feminist theories of gender inequality, masculinity is mistakenly characterized traditionally as dominance and competitiveness, while, in contrast, femininity is associated with docility and submissiveness to male power or patriarchy.

In the Zimbabwean context several reasons abound in the explanation of the aforementioned phenomenon including women's desire to work for hours that enable them to combine familial duties in what Oakley (2011) calls the private sphere of the home with work in the public sphere of society. Another aspect that makes analysts such as Momsen (2007) to suggest that women unlike their male counterparts prefer work that is predictable, subordinate and less financially productive is that many of them in employment in the African work contexts are found in such occupations as nursing, teaching, flights cabin crews, and as receptionists, personal assistance to many men among others (Gordon, 2003). It is for arguments such as the aforementioned

that researchers such as Mutekwe and Modiba (2013) maintain that boys' and girls' choices of careers in Zimbabwe are indeed a product of gender role socialization in the social structures in which they grow. On this aspect Giddens (2010) adds that it is often the influence of structure on their agency that dictates their career aspirations in society. It is such a mind-set that has led many parents and guardians in many African societies to consider careers as either masculine or feminine domains (Gordon, 2003). The trend seems to be traversing geographical boundaries though many societies do not subscribe to a gender-segregated economic dispensation. This study thus examined how the school curriculum contributes to boys and men as well as girls and women's gender polarized occupational aspirations with Zimbabwean women preferring to take up careers that are often less superior to those of their male counterparts.

Aims and Objectives of the Study

The aim of this study was to examine how the curriculum followed by Zimbabwean learners predisposes them to gendered occupational aspirations. Further to this aim, the study also seeks to proffer possible interventions or remedies to the phenomenon of a gender polarized curriculum for the Zimbabwean learners. Pursuant to these aims, the following objectives were formulated:

• To identify factors in the curriculum that predispose boys and girls to gendered occupation trajectories;
• To examine how teachers contribute to the creation of a gender polarized occupational trajectory for learners;
• To provide possible intervention strategies towards a gender sensitive curriculum for schools.

Research Questions

• What curricular factors impinge upon Zimbabwean boys' and girls' occupational trajectories?
• How do teacher attitudes contribute to the creation of gender polarized occupation aspirations for pupils in Zimbabwe?
• What remedial action(s) can be given towards promoting gender sensitivity in occupational aspirations between boys and girls in Zimbabwe?

Problem Statement

The challenge for girls and women in Zimbabwe is that owing to gender role stereotypes engendered by society, peddled and perpetuated by schools through both the formal and hidden curricula, girls and women are left with no choice but to follow gender-defined social roles (Mutekwe et al., 2014). It is important to note that although the curriculum appears to be gender neutral, it in actual fact is not given that through the hidden curricular forms (tacit learning), it entrenches the patriarchy cherished in the wider society (Gaidzanwa, 2010). Even in situations where some girls or women feel they have the ability and spine to pursue career aspirations of their choices, they encounter serious negative consequences resulting from engaging in what the wider society regards as gender-role-deviant behaviors (Gordon, 2003). Further to this view, the influence of the patriarchal ideology in the curriculum and wider society also manifests itself in that for girls or women who succeed academically and excel professionally, these are considered and treated like men (Momsen, 2007). This also shows the controlling effect of gender role socialization in society and on the learners' career aspirations. Jansen (2012) aptly explains the issue of gender biased career aspirations as embodied in curricular scholarship concerned with school subjects which focuses on their nature, design and organization, including their effects on learning and teaching, as well as attitudes among the different learners' genders (Gaidzanwa, 2010).

Theoretical Framework

The literature review for this study is anchored in Giddens' theory of structuration, which maintains that structure and agency and their interplay are more often than not, the main influences in the human beings' quest for decision making for careers are concerned (Giddens, 2010; Mavhunga, 2006). This implies that Giddens' structuration theory constitutes the theoretical framework for the study. Drawing from Giddens' theory, one is tempted to argue that despite efforts by some educators and learners to promote gender sensitivity in the curriculum, and career aspirations, it seems Zimbabwean girls find themselves locked into traditional female careers. (Morgan et al., 2011) The study thus drew on Giddens' structuration theory to explore how schools, classrooms and families as social structures impacted on the girls' agency in career aspirations and choices. The experiences gained through lessons and the images portrayed in curricular material and in the schools' organizations are amongst the factors examined as social structures that impacted on the girls' agency (Giddens, 2010). The views of Heidegger (2002), Merleau-Ponty (1974) and Wright Mills (2000) were also drawn on

to clarify further how the girls' lived experiences in these structures influenced their career aspirations.

The views generated through a synthesis of the theoretical views of the aforementioned theorists did lend credence to Giddens' (2010) and Mills' (2000) assertion that the interplay of structure and agency often determines an individual's destiny in his or her life course. In the case of this study, in spite of each individual girl having her own desires, relationships, decisions or ambitions, the fact that she lived in a particular social milieu at a particular time in history implied that she could not always be protected from the social structure of which she was part (Mau et al., 2008). The literature presented herein was thus shaped predominantly by the circumstances which the girls experienced, and it reflected their lived experiences especially the lives lived in their social structures, families, schools and the wider society in which particular forms of gender role socialization occurred and attitudes towards careers were developed (Ritzer & Goodman, 2015). In addition, curricular material, teachers' stereotyped and prejudicial attitudes and expectations, as well as the gender typing of school subjects and careers formed part of these lived experiences. In particular, the teachers' interactions with the pupils enabled or constrained the girls' agency (Giddens, 2010) to select non-traditional roles. Since the school curriculum defines what is taught and regulate both what a girl or boy pupil is to learn and how learning and teaching are to be considered for him or her, the classrooms and co-curricular activities typical of the school culture certainly influences the resultant career trajectories for boys and girls (Perera & Velumayilum, 2008) This thus makes the school curriculum a major determinant of the pupils' career choices and such a view lends real credence to Christie's (2008) assertion that schooling has an ensemble of mechanisms, from its architecture to the curriculum or content of education that constantly reminds pupils of their gender roles in their society.

A particularly important view extrapolated from Giddens' structuration theory is about the duality of structure, which also explains how the learners' occupational aspirations are influenced by the two factors structure and agency through their interactive relationship (Nhundu, 2007). In fact, the notion of duality of structure is one of Giddens' coined phrases and main propositions in his explanation of structuration theory (Mills, 2000). The basis of the duality lies in the relationship the agency has with the structure. In the duality, the Agency has much more influence on its lived environment than past structuralist theory had granted (Giddens, 2010; Made, 2008). The key to Giddens' explanation is his focus on the knowledgeability of the agent and the fact that the agency cannot exist or be analyzed separately from its structure. They can only exist as a duality (Christie, 2008). The structural properties which he calls modalities help illustrate the dimensions of the

duality. By the duality of structure Giddens thus implies that the structural properties of social systems such as schools, families, religions, politics, mass media and the economy are both the medium and the outcome of the practices that constitute those systems (Giddens, 2010). From the foregoing, it follows therefore that the structure has both rules and resources or constraints and enabling qualities. In this sense the school curriculum as a structure, for example, can enable some learners (boys) while constraining others, for example, girls in terms of occupational aspirations. Language is often used to exemplify these modalities because the system of human interaction includes in itself rules of the language such as syntax but also leaves room for interpretations or the creation of completely new words and opportunities (Paa & McWhirter, 2000). The system of interaction is responsible for maintaining a certain standard of consistency in order for the language to make sense to both the speaker and the interpreter (Christie, 2008). At the same time, the completeness of the language can always be manipulated and changed through interaction by the agent (Nziramasanga, 1999). It is in this sense that structure is said to have both rules and resources or constraints and enabling qualities with language often used to exemplify these modalities (Giddens, 2010).

The above is often manifested in the treatment of boys and girls in the classrooms and in the individualized work cards and wall charts displayed in these classrooms, which often make it possible for authorities to capture and perpetuate the gender role stereotypes, ideologies, prejudices and values that predispose girls and boys to particular career aspirations (Mills, 2000; Ortner, 1989). Both explicitly and implicitly, attitudes, ideologies and values that are predominant tend to exert forms of gender stereotypes and biases that emphasize the patriarchal ideology as common sense leading to hegemonic masculinity on the occupational sphere (Gramsci, 1971; Otto, 2000). These factors certainly tend to inhibit gender equity in schools and to promote gender discriminatory tendencies, resulting in a sustained pattern of occupational disadvantage for girls and tendencies that are complex and intractable to those who initiate changes within the Zimbabwean school system (Mutekwe et al., 2011). In this system, despite what the education policy promotes, school curricula will channel pupils into the gender-polarized occupational trajectories (Sikora & Pokropek, 2011). Therefore, to understand how the pupils' and teachers' experiences within schools impinge upon the learners' choice of careers it would be crucial for one to explore how both groups of male and female pupils are meaning-makers in the schools in which they are part.

Drawing on Walker's (2010) emphasis on the importance of the relationship between the classroom and school activities, social structure and culture of society, the explicit and hidden forms of the school curriculum as realities

for the girls and their teachers were crucial to the study. Such realities included their beliefs, values, attitudes towards each other, relationship structures and other socially constructed dispositions (Onoyase & Onoyase, 2009). The girls' views about teachers, parents and occupational counselors were important in that they raised awareness that they could do the same jobs as their boy counterparts. Therefore, how they deconstructed the gender role biases and prejudices that were associated with girl-oriented careers were of particular interest to the study.

Research Methodology

The study adopted an exploratory sequential mixed method design combining both the qualitative and qualitative methodologies (Clark & Creswell, 2014). This implies that in terms of paradigm, the study drew from a pragmatic world view, whose philosophical underpinnings hinge upon what works as the truth regarding the research questions under investigation and the need to strike a compromise in paradigmatic wars (Tashakkori & Teddlie, 2009: 713). The paradigm has also led to what Patton (2015: 257) has called a paradigm of choices to justify specific options about research procedures based on their ability to meet overall research goals or objectives. In this study the choice of an exploratory sequential mixed methods design was motivated by the researcher's desire to overcome the limitations of the qualitative by drawing on the strengths of the quantitative methodology (Sianou-Kyrgiou & Tsiplakides, 2009). The data for the qualitative research aspects of the study were collected through focus group interviews with the focus group interview guide as the instrument. However, for the quantitative section of the study, a structured questionnaire was used with questions asked to the respondents being of a closed ended nature (Nieuwenhuis, 2016).

In adopting a mixed method design, Hesse-Biber and Leavy's (2012) epistemological position was adopted to argue that using focus group discussions would help elicit data whose ontology would be subjective while using a structured questionnaire would generate data whose ontology would be objective and together the two data collection instruments would provide complementarity and some degree of triangulation culminating in the research findings that would be credible, trustworthy, reliable and valid (Richardson, 2015). Further to this, the views of proponents of focus group interviews such as Odimegwu (2004) and Dzvimbo et al. (2010) maintain that these methods of data collection enable a proximal interaction with participants and or respondents and thus generate a wide range of responses by activating details of perspectives while releasing inhibitions and allaying fears and biases. These research tools thus helped elicit rich texts as participants tended to build on each other's ideas and comments to provide in-depth and value added

insights on their perceptions of curricular factors affecting Zimbabwean learners' occupational trajectories upon graduating from schools. Focus group interviews, as described by McLafferty (2004), refer to semi-structured group discussions, moderated by a discussion leader, held in a formal or informal setting, with the purpose of obtaining data by means of group interaction on a designated topic. A structured questionnaire on the other hand comprises closed ended questions designed to elicit objective responses from the respondents (Nieuwenhuis, 2016). In using these two data collection tools the researcher also drew from the insights of Geertz (2002) who maintains that the techniques are capable of unearthing crucial issues regarding a people's culture or systems of beliefs and practices embedded in their structured human social relations.

Population and Sampling

The target population for this study was high school girls and their teachers from Zimbabwe's 200 secondary schools in the greater Harare education district. It was from this population that a total sample size of 20 participants comprising 10 high school girl participants for the focus group interviews and an equal number of high school teachers as respondents for the structured questionnaires. These were purposefully sampled from 4 high schools on the basis of their being boarding, day schools and co-educational as well as single sex schools. To identify the actual participants, a systematic sampling procedure was adopted involving assigning numbers to the list of girls in a sampling frame before selecting in multiples of 10 to yield a total sample size of 10 girls. The same procedure was adopted to get the 10 teachers to take part in the study thereby resulting in a total sample size of 20 participants. The girls were then organized into 2 focus groups of 5 members each for ease of interaction in the FGDIS, which took place at the schools in the board rooms in the period from 20 June–5 July 2017.

Each focus group was interviewed for about 45 minutes to one hour. While the participants for the focus group interviews were high school girls, those of the structured interviews were the high school teachers with a minimum teaching experience of 10 years in the field. The teachers' qualifications ranged from the Bachelor of Education to Masters' degrees in education in the various teaching subjects they offered. The two categories were believed to provide useful insights into the curricular factors affecting the girls' occupational aspirations. The structured questionnaire was administered to the 10 high school teachers, who completed them successfully within a space of two weeks thereby ensuring a hundred percent response rate (Nyagura & Riddell, 1991). In terms of the sample, as mentioned earlier on, the study utilized a purposive sample size of 20 participants chosen as a

cross-section of the larger target population of sixth form girls and teachers in the province. By uncovering the different social meanings attached to the different school subjects and occupations by girls, the influence of the educational curricular provided by schools as social structures were examined.

Ethical Considerations

The data collection process for this study began with researcher having to seek and obtain the necessary ethical clearance especially the permission to carry out the study from the Provincial Educational Directorate, district and school principals before going into the schools and this was made as part of the advance protocols needed (Bertram & Christiansen, 2014). To make the participants at ease prior to the focus group interviews and questionnaire completing process, the researcher had to fist make them aware of the presence of the voice recording gadget, the audio recorder that was utilized to allow for later transcription and analysis (Nieuwenhuis, 2016). In all this, the researcher took into account the principles of informed consent so as to allow the participants full knowledge of the freedom they had to withdraw from the research at any time should they felt the need to. Fortunately, none of them withdrew from the study prematurely. All the interview proceedings were voice recorded for later transcription and analysis. As a result, the focus group interviews and structured questionnaires schedule unfolded with the researcher spelling out the study objectives and the modus operandi it was to take so as to afford the participants not only the necessary informed consent but also to guarantee them the principles of confidentiality, anonymity and the voluntary participation they were undertake in the study (Bertram & Christiansen, 2014).

The Data Analysis Process

Drawing particularly from the views of Dey (2013: 10) who asserts that data the data analysis for mixed methods research studies need to adopt either an exploratory sequential or explanatory sequential way conducted in terms of whether the qualitative or quantitative data analysis begins, the researcher began with the former and used the findings from it to buttress those from the quantitative approach (Fisher & Griggs, 1995). The qualitative data analysis was thus conducted thematically with the themes emerging from the focus group interview discussions being clustered into code families or over-arching themes, which Nieuwenhuis (2016) calls super-ordinate themes. These were then interpreted in terms of meanings mediated through language coupled with the use of verbatim excerpts from interviews as reflected in the

voice-recordings and the narrative vignettes that characterized the focus group interviews (Siyakwazi & Dengu, 2000). On the other hand, the quantitative data generated through the structured closed ended questionnaires were analyzed through the use of summary tables, frequency counts and statistical conversions to percentages. Guided by Bertram and Christiansen's (2014) cautioning that one of the crucial aspects in the analysis of quantitative data is the identification of patterns, commonalities, differences and processes, the researcher then synthesized the findings from both the qualitative and quantitative sections into a cohesive discussion of the findings of the study (Tesch, 2010). This involved unpacking the data into separate parts, examining it to make objective and subjective realities, assertions and assumptions as well as comparisons between the themes emerging from the high school girls' and their teachers' perceptions of curricular factors that impact on their occupational aspirations (Wilson-Sadberry et al., 1991). The approach helped unearth the patterns of similarities or consistencies and differences in the gathered data. As a result, the themes that emerged from the analysis of data then formed the basis of the discussion of the results as outlined below.

Results and Discussion

This section of the study presents the results and discussion from the analysis of both the qualitative and quantitative data gathered. It adopts an eclectic approach integrating both linguistic and numerical views as obtained from the participants and or respondents respectively. Consistent with the interview guide, the questions designed for the high school girl participants were categorized into four sections (A–D) with questions in each section focusing on the research questions for the study. The interview guide helped keep the interview sessions focused (Patton, 2015). Questions in the first section of the focus group interview guide were meant to solicit the data on the role of the school in orienting girls to specific school subject choices and occupational aspirations. The rationale was to try and establish the link between subjects studied by the girls and the career aspirations they eventually follow upon leaving school. Four questions were thus posed to the participants as follows: State the subjects you are studying; what career aspirations do you wish to follow upon leaving school? Why did you choose to study the subjects you mentioned? And how has your school contributed towards your choice of school subjects? The participants' responses to the above qualitative data questions are summarized quantitatively in the table that follows.

Table A Summary of the participants' responses to questions 1–4

Curriculum	No:	Occupational aspirations	Responses as % ages	Motivation for occupational aspirations
Accounting	2	Chartered accountant	20	Well-paying. My sister works for Ernest and Young and she is highly paid.
Art	2	Artist	20	I have always enjoyed art. I like representing things through art. If I pass I wish to be an artist.
Biology	4	Cosmetology/ Medical doctor	40	My mom is a nurse and she says it is a good job for a woman because it teaches one to care. One can also join the cosmetology industry and do well there especially with good passes in biology.
Chemistry	1	Pharmacist/ Nurse	10	I need to be dispensing medicines to help out.
Divinity	6	Teacher/ Lawyer	60	The working hours and holidays impress me.
English lit	5	Teacher/ Lawyer	50	Security, holidays, ideal for a woman, allows me time with children and still work.
Economics	1	Economist/ Entrepreneur	10	I enjoy entrepreneurial activities. My mom introduced me to the market at a tender age and I have since realized I can go far with it becoming perhaps an economist.
Geography	2	Teacher/ Air hostess	20	In my view this is really a woman's job. It offers holidays so one can be with her kids.
History	4	Teacher/ Lawyer	40	Security, requires knowledge, interest, opportunity for further studies.
Mathematics	1	Engineer/ Medical doctor	10	Offers high employment prospects, prestigious and well paid.
MOB	2	Hotelier/ Personal assistant	20	Serving the community. Interesting and pleasant for a lady who wishes to be close to her kids.
Music	3	Musician	30	Great entertainment, travel and meeting friends.
Physics	1	Nurse/ Pharmacist	10	Prestigious, well paid, suits my education abilities and not heavily contested by men.
Sociology	3	Social worker	30	Offers me an opportunity to help society cope with social challenges.
Shona	6	Teacher	60	Smart, white collar, offers great security, has opportunity for further studies and a chance to attend to your kids due to leas or no travels.

Asked to motivate their choice of subjects and career preferences, the above were some of responses the participants gave during the focus group interviews. A verbatim statement by one respondent whose pseudonym was Lesego was as follows:

Lesego: *Since I am studying the Arts subjects (Divinity, History and Shona), these can only enable me to become either a teacher or lawyer if I pass my Advanced level school examinations at the end of the year. Other responses to the question included the following excerpts quoted verbatim:*

Chipo: *I am an arts person and hoping to become either a teacher or social worker.*

Takudzwa: *My sister has advised me that if I pass I can join an internship programme in her accounting firm early next year and work and study accounting articles.*

Tadiwa: *The career counsellor has given me hope that as a girl I need to choose from any of the following careers; nursing, teaching, hotelier, cosmetologist, lawyer, social worker, accounting and pharmacists because professions such as engineering, architecture and others in the automotive industry are a preserve for men given their call for physical strength and endurance.*

Drawing on the above verbatim statements from participants, one can discern that even when occupational psychologists from Zimbabwe advise learners on career aspirations, their biased gender role attitudes creep in the quality of the advice they give to the learners. The above view clearly shows there is clearly a need to make girls conscious of the fact that they can do the same jobs as their boy counterparts instead of simply presenting a list of the professions without helping to deconstruct the myths and misconceptions engendered in the family and perpetuated through the hidden school curriculum. Another issue that emerged from both the focus group interviews and from the structured questionnaires regarding the sources of gender-biased occupational aspirations is parental influences and the influence of older siblings.

Parental and the Influence of Older Siblings

It emerged from the focus group interviews and the structured questionnaire responses that the girls' responses to parental advice and the advice of their older siblings have an enormous influence on the types of occupations the girls would pursue. Many of the teacher respondents reported that many girls prefer jobs that would allow them to stay closer to their families than would jobs like trucking, building or engineering, which are stereotypically masculine domains in the Zimbabwean employment sector (Gordon, 2003). Trucking, for example, involves spending several days away from home. It

was clear these gender-typed perceptions regarding jobs that are deemed appropriate for married women, were attributed to the home environment and society at large, which generally express social disapproval of women who pursue careers that interfere with their social role of child rearing or domesticity. These views thus lent credence to the assertion by Taylor et al. (2004) that parents who wish to have their say in their college-age children's career choices will more often than not impact on the resultant occupational outcomes.

The table (B) below illustrates the frequency counts of high school girls interviewed, their school subjects, number interested in each of the listed occupations, occupational preferences, percentages of choices and the motivation given for the particular occupational aspiration. The overall result of the analysis as summarized in the table clearly indicates that the most popular occupations as identified by the girls are as follows in rank order: teaching, law, cosmetology or medicine, social work, music, chartered accounting, art, air hostess, nursing, pharmacy and engineering. A further analysis of the statistics on the table clearly shows that girls and women are particularly interested in occupations that offer more time with children, holidays such as the ones enjoyed by teachers, security, entertaining and helping communities.

Table B Frequency of occupational choices by girls and their motivation thereof

School subject	Occupation	Frequency	% age	Motivation given
Accounting	Chartered accountant	2	20	Well-paying. My sister works for Ernest and Young and she is highly paid.
Art	Artist	2	20	I have always enjoyed art. I like representing things through art. If I pass I wish to be an artist.
Biology	Cosmetology/ Medical doctor	4	40	My mom is a nurse and she says it is a good job for a woman because it teaches one to care. One can also join the cosmetology industry and do well there especially with good passes in biology.
Chemistry	Pharmacist/ Nurse	1	10	I need to be dispensing medicines to help out.
Divinity	Teacher/ Lawyer	6	60	The working hours and holidays impress me.
English lit	Teacher/ Lawyer	5	50	Security, holidays, ideal for a woman, allows me time with children and still work.
Economics	Economist/ Entrepreneur	1	10	I enjoy entrepreneurial activities. My mom introduced me to the market at a tender age and I have since realized I can go far with it becoming perhaps an economist.

Geography	Teacher/ Air hostess	2	20	In my view this is really a woman's job. It offers holidays so one can be with her kids.
History	Teacher/ Lawyer	4	40	Security, requires knowledge, interest, opportunity for further studies.
Mathematics	Engineer/ Medical doctor	1	10	Offers high employment prospects, prestigious and well paid.
MOB	Hotelier/ Personal assistant	2	20	Serving the community. Interesting and pleasant for a lady who wishes to be close to her kids.
Music	Musician	3	30	Great entertainment, travel and meeting friends.
Physics	Nurse/ Pharmacist	1	10	Prestigious, well paid, suits my education abilities and not heavily contested by men.
Sociology	Social worker	3	30	Offers me an opportunity to help society cope with social challenges.
Shona	Teacher	6	60	Smart, white collar, offers great security, has opportunity for further studies and a chance to attend to your kids due to leas or no travels.

Another key theme emerging from the teachers' responses to the structured questionnaire was concerned with the link between school subjects and the occupational aspirations accruing to them as reported in Table A. A discussion of findings under this theme is given in details below.

The Link between School Subjects and Career Aspirations

This theme emerged from both the teachers' responses in the structured questionnaires and in the focus group discussions and it clearly revealed that there is a positive correlation between the subjects studied by the girls and the career trajectories they would eventually pursue upon leaving school as shown by the general indication on table A. It was evident that school girls who favor the arts and social science subjects' in the school curriculum tend to pursue occupations in fields such as law, teaching, hotel and catering and general social work. The evidence illustrated in table A show that between 2 and 6 girls out of 10 girl respondents (20%) and (60%) whose high schools studies included English literature, History, Sociology, Divinity, MOB and Shona aspire to pursue social work and basic helping careers as teachers, hoteliers, personal assistants, solicitors or lawyers.

The one high school girl (10%) studying Economics cited a desire to become a general entrepreneur or economist. Two respondents (20%) whose

subject domains included Geography mentioned careers such as teaching and air hostess on the grounds that these in their views, are real women's jobs because they offer holiday opportunities and an opportunity for one to be with their children most of the time. The 2 girls (20%) who chose accounting as a career claimed to have gotten the inspiration from their parents and older siblings already in the profession and doing well. The 2 girls (20%) studying subjects that included Management of Business (MOB) cited a desire to work in the hotel and catering industry as hoteliers or entrepreneurs in sales and marketing. They also cited a desire to serve their community as part of their motivation. Careers such as those in medicine (40%), engineering (10%), pharmacy (10%) and cosmetology (40%) were also cited by girls studying pure sciences such as mathematics, biology, physics and chemistry. Three of the girls (30%) studying subjects that included sociology claimed to be geared towards people oriented careers such as social work on the grounds that such careers offer them an opportunity to help society cope with the many and varied social challenges bedeviling it.

Responding to the question as to why they are still attending school when others of their age and gender have since left (question 5), 7 of the girls (35%) cited a desire for high rewards for deferred gratification given that the higher the academic qualifications as a result, the higher the likelihood of them being able to compete well with their male counterparts who always want to dominate the job market. Five girls representing 25% of the 10 girls in the sample were of the view that remaining in the school up to advanced level has the potential to provide them with an opportunity to venture into careers and occupations traditionally construed as masculine domains. For them, challenging patriarchy in the occupational world requires girls and women of academic and professional substance.

Among the structured closed ended questions posed to the teachers were those that focused on an enquiry into the objective reasons why some girls have dropped out of school; whether or not the teachers had something to do with this; whether or not the girls ever missed school or failed to submit work assignments on time due to any gender-based constraints; whether or not it is in their opinion rational to regard a woman's position as being basically in the home and what different tasks they think parents often assign to girls as compared to the boys in the homes. The objective of these questions was to try and establish the impact of gender role stereotypes on the girls' occupational aspirations. Among the many and varied responses provided as to why others have left school were the issues of academic under achievement, sexual harassment by teachers and some boys and parental attitudes towards girls' education and occupations. The aforementioned factors along with issues of the various tasks allocated to girls and boys in their homes are highlighted in the discussion that follows.

Academic Underachievement as an Impediment to Girls' Occupational Aspirations

In the context of Zimbabwe and elsewhere, the term achievement is commonly used to denote a level of attainment measured by some form of objective test, for example, ordinary and advanced level examinations (Gordon, 2003). On the contrary, underachievement marks a level of achievement below a minimum given standard and thus considered unacceptable for advancement to higher education or certain occupations (Mutekwe & Modiba, 2013). In short, for the Zimbabwean Education standards, the term underachievement defines a level of attainment below the level set as a pass mark at an examination or level. An underachieving girl will thus be one who scores lower than the acceptable score in a test or examination and whose performance is described as below standard. Eight teachers (45%) cited in their responses to the structured questionnaires, underachievement as the reason why some of the girls quickly drop out of school prematurely. Five teachers (25%) attributed this to the challenges associated with the sexual harassment of girls in the schools they will be.

Sexual Harassment as an Impediment to the Girls' Occupational Aspirations

The results of the structured questionnaires answered by the girls' high school teachers showed that 5 of the 10 in the sample (50%) were of the view that the sexual harassment of girls in the co-educational high schools accounted for a high rate of school dropouts for the girls. Asked to elaborate their claims the teachers claimed the harassment takes a variety of forms from verbal to the physical, and occurs at several levels such as harassment of the girls by boys and sometimes by young male teachers. Surprisingly, the teachers admitted that the sexual abuse of high school girls by male teachers is not an infrequent phenomenon particularly in township high schools. About eight respondents (80%) cited young teachers as among the main culprits in the abuse of girls by the teaching staff. The following forms of sexual abuse were also cited: stereotypical teasing, humiliation, verbal sexual bullying or assaults and the unnecessary ridicule of girls by these teachers as some of the impediments to the girls' occupational aspirations. For 6 of the respondents (60%), the sexual harassment occurs both within and outside the classroom. The following are sample responses from some of respondents of the structured questionnaire.

Respondent 3: Some teachers *can make the girls shy by making comments about their physical structure, about your body while the boys take advantage to go further with the abuse.*

Asked to state what some teachers do which the girls consider as sexual harassment, which contribute to their academic underachievement and eventual effect on occupational aspirations, the following were some of the responses given by the girls in their responses during the focus group interview discussions:

Respondent 4: *One of the big challenges we encounter is teachers who propose love to us girls and if one says, no, he can make you fail the subject, or certainly make you hate school or dropout of it. Teachers proposing love to us girls make us to be shy in class. You must be very quiet so that he will not notice you.*

When asked what the teachers do if boys unnecessarily laugh at or ridicule them in the classroom, 7 or 70% of the girls in the sample claimed that some of the teachers laugh with the boys or just ignore them. Probed further about whether or not they report incidents of sexual harassment and abuse to other staff members, particularly to female teachers, 5 of the high school girls (50%) claimed that reporting cases to teachers would in fact do more harm than good. One girl interviewee had this to say:

Respondent 5: *If you report it, no, that is not good. You will be on tight. The teacher will say that you are a prostitute and you were attracting the man. You cannot tell the lady teacher because she may be very angry with you alleging you are to blame. The lady teachers may say a teacher will not propose love to you if you did not entice him. May be he rejected you that is why you are reporting him.*

The interviewed girls claimed that the male teachers tend to collude with the male pupils in the verbal harassment of girls in the school or classroom, either by omission or directly while female teachers ignore appropriate reports of harassment.

Parental Attitudes towards the Girls' Occupational Aspirations

Many of the teachers claimed in their responses in the structured questionnaires that may of the parents uphold the belief that girls who are sexually harassed or abused by boys and teachers are to some extent responsible for their fate and this view is fairly common amongst both parents and teachers. The girls cited this as one of the reasons why some of these parents withdraw their girl children from school preferring to have them married instead. Six girl interviewees (60%) also lambasted their teachers and parents' acceptance of the feminine role as primarily domestic and the belief that men should be the providers, breadwinners and heads of the families. The girls argued that this starts in the way parents allocate social roles to boys and girls in the

home where more roles to do with domesticity are considered a female domain while roles to do with life outside the private sphere of the home are considered male domains. As a result the occupational landscape becomes skewed in favor of the boys. This dovetails with Gati et al.'s (2015) and Gaidzanwa's (2010) assertion that in many parts of the world especially Africa, girls and women are educated for domesticity while boys and men are prepared for work in the public sphere outside of the home. The teachers further cited the portrayal of men and women in their learners' literature as yet another factor that impacts on the girls occupational aspirations. A discussion of this factor is highlighted below.

Images of Men and Women in Learners' Literature

According to the teachers' views many children's books right from primary to high school tend to engender images of superiority and inferiority between boys and girls by portraying boys in more prestigious occupational roles while relegating girls and women to secondary positions as if they are second class citizens. In many text books images such as those that show boys up in the trees while girls look on in amazement or men as medical doctors while women are nurses tend to promote the gender polarization of occupations with girls and women assuming a misconceived mind-set about their social roles in life. The above views dovetail with those of Gutek (2008) who contend that sex segregation as a problem in the social structures has its genesis and or antecedents in the home and transcends to the occupational sphere of society.

Conclusion

The chief conclusion made from this study was that the occupational aspirations of girls are affected by a whole range of factors such as gender role socialization, parental attitudes towards girls, their sexual harassment by boys and male teachers in the schools, parental and the influence of older siblings, teacher attitudes and expectations of boys' and girls' occupational roles in society, academic underachievement especially in comparison with their boy counterparts, the correlation between subject choices and occupations as well as the portrayal of men and women in the pupils' literature.

Recommendations

The key recommendations made following the aforementioned conclusion include that a lot needs to be done to the school curriculum in order to

deconstruct the gender role biases and stereotypes embodied in both the formal and hidden curricula. The process of choosing school subjects by both boys and girls need to be made more gender sensitive than it currently is. Teachers and parents need to refrain from imposing their belief in the feminine mystique, that is, the mind-set that certain occupations especially the light weights are for females while the heavy weights are for the males. Gender role socialization practices also need to empower the girl child and sensitize them towards equality of opportunities regardless of gender differences and ultimately equitable learning and occupational prospects in society. Parents also need to refrain from imposing occupations on their children along gender lines and allow them equal room to choose as they wish. In the same breadth, teachers also need to be aware of the important roles they in influencing change towards gender sensitivity in both the school curriculum and their learners' occupational aspirations if society is to be an equal place for men and women to live fairly.

REFERENCES

Bertram, C., & Christiansen, I. (2014). *Understanding Research: An Introduction to Reading Research*. Pretoria: Van Schaik.

Chengu, G. (2016). "Indigenization Must Empower Women," *Zimbabwean*, 16 December: 14–16.

Christie, P. (2008). *Changing Schools in South Africa: Opening the Doors of Learning*. Johannesburg: Heinemann

Clark, V. P., & Creswell, J. W. (2016). *The Mixed Method Reader*. London: Sage.

Dey, I. (2013). *Qualitative Data Analysis: A User-Friendly Guide for Social Scientists*. New York: Routledge.

Dorsey, B. (1989). "Academic Women at the University of Zimbabwe: Career Prospects, Aspirations and Family Role Constraints," *Zimbabwe Journal of Educational Research* 1(3): 342–376.

Dzvimbo, P., Moloi, C., Potgieter, F., Wolhuter, C., & Van der Walt, C. (2010). "Learners' Perceptions as to What Contributes to Their School Success: A Case Study," *South African Journal of Education* 30(3): 475–490.

Fisher, T. A., & Griggs, M. B. (1995). "Factors that Influence the Career Development of African-American and Latino Youth," *The Journal of Vocational Education Research* 20(2): 57–74.

Gaidzanwa, R. (2010). *Images of Women in Zimbabwean Literature*. Harare: Longman.

Gaidzanwa, R. (ed.) (2012). *Speaking for Ourselves: Masculinities and Femininities at the University of Zimbabwe*. Harare: Ford Foundation.

Gati, I., Osipow, S., & Givon, M. (1995). "Gender Differences in Career Decision Making: The Content and Structure of Preferences," *Journal of Counseling Psychology* 42(2): 204–216.

Geertz, C. (2002). *The Interpretation of Cultures*. New York: Basic Books.

Giddens, A. (2010). *Sociology*. Cambridge: Polity Press.
Gordon, R. (1994). "Educational Policy and Gender in Zimbabwe," *Zimbabwe Journal of Educational Research* 6(2): 131–139.
Gordon, T. (2003). *Single Women: On the Margins?* London: Macmillan.
Gramsci, A. (1971). *Selections from the Prison Notebooks*. New York: Routledge
Gutek, B. (2008). "Sex Segregation and Women at Work: A Selective Review," *Applied Psychology: An International Review* 37: 103–120.
Heidegger, M. (2002). *The Basic Problems of Phenomenology*. Bloomington, IN: Indiana University Press.
Hesse-Biber, S., & Leavy, P. (2012). "Introduction: Pushing on the Methodological Boundaries: The Growing Need for Emergent Methods within and across the Disciplines," in Hesse-Biber S. N. & Leavy P. (eds.), *Handbook of Emergent Methods*. New York, NY: Guilford Press, 1–15.
Jansen, J. (2012). "What Education Scholars Write about Curriculum in Namibia, South Africa and Zimbabwe," in Pinar, W. (ed.), *International Handbook of Curriculum Research*. Mahwah, NJ: Lawrence Erlbaum, 23–44.
Made, P. (2008). "Gender Imbalances in the Business World of Zimbabweans," *Economic Review* 3: 13–16.
Marira, C. (1991). "The Portrayal of Women in Two Children's Books Used in Zimbabwe's Primary Schools," *Zimbabwe Journal of Educational Research* 3(1): 21–23.
Mau, W., Hitchcock, R., & Calvert, C. (1998). "High School Students' Career Plans: The Influence of Others' Expectations," *Professional School Counselling* 2(2): 161–166.
Mavhunga, P. (2006). "Africanizing the Curriculum: A Case of Zimbabwe," *Zimbabwe Journal of Educational Research* 20(1): 440–452.
Mawarire, J. (2007). "Locating Women and the Feminist Discourse in Zimbabwean Transitional Politics," *Journal of Alternatives for a Democratic Zimbabwe* 1(2): 10–11.
McLafferty, I. (2004). "Focus Group Interviews as a Data Collection Strategy," *Journal of Advanced Nursing* 48(2): 187–194.
Merleau-Ponty, M. (1964). *The Primacy of Perception, and Other Essays on Phenomenological Psychology, the Philosophy of Art, History and Politics*. Evanston, IL: Northwestern University Press.
Merriam, S. (1998). *Qualitative Research and Case Study Applications in Education*. San Francisco, CA: Jossey Bass.
Mills, C. (2000). "Reproduction and Transformation of Inequalities in Schooling: The Transformative Potential of the Theoretical Constructs of Bourdieu," *British Journal of Sociology of Education* 29(1): 79–83.
Morgan, C., Isaac, J. D., & Sunstone, C. (2001). "The Role of Interest in Understanding the Career Choices of Female and Male College Students," *Sex Roles* 44(5/6): 295–320.
Momsen, J. (2007). *Gender Resource Book for Teachers*. Harare: UNICEF.
Momsen, J. (2015). *Perspectives on Gender and Development*. London: Routledge.
Mutekwe, E., Modiba, M., & Maphosa, C. (2011). "Factors Affecting Female Students' Career Choices," *Journal of Social Sciences* 29(2): 133–141.

Mutekwe, E., Modiba, M., & Madzanire, D. (2014). "Perceptions of Zimbabwean School Girls and their Teachers on the Extent to which the School Curriculum for Girls Correlates with their Career Choices," *The Anthropologist* 17(2): 577–589.

Mutekwe, E., & Modiba, M. (2013). "Perceived Gender-Based Challenges Endured by Zimbabwean Secondary School Girls in their Academic and Occupational Prospects," *Perspectives in Education* 31(1): 20–29.

Nhundu, T. (2007). "Mitigating Gender-typed Occupational Preferences of Zimbabwean Primary School Children: The Use of Biographical Sketches and Portrayals of Female Role Models," *Sex Roles* 56(9/10): 639–649.

Nieuwenhuis, J. (2016). "Qualitative Research Designs and Data Analysis Techniques," in Maree, K. (ed.), *First Steps in Research*. Pretoria: Van Schaik, 72–84.

Nziramasanga, C. T. (1999). *Report of the Presidential Commission of Inquiry into Education and Training*. Harare: Zimbabwe Government Printers.

Oakley, A. (2011). *Gender, Women and Social Sciences*. Bristol: Policy Press.

Odimegwu, F. (2004). "Methodological Issues in the Use of Focus Group Discussion as a Data Collection Tool," *Journal of Social Sciences* 4(2/3): 207–212.

Onoyase, D., & Onoyase, A. (2009). "The Relationship between Personality Types and Career Choice of Secondary School Students in Federal Government Colleges in Nigeria," *The Anthropologist* 11(2): 109–115.

Ortner, S. B. (1989/1990). "Gender Hegemonies: The Construction of Gender and Modes of Social Division," *Cultural Critique* 14: 35–80.

Otto, L. (2000). "Youth Perspectives on Parental Career Influence," *Journal of Career Development* 27(2): 111–118.

Paa, H., & McWhirter, E. (2000). "Perceived Influences on High School Students' Current Career Expectations," *Career Development Quarterly* 49(1): 29–44.

Patton, M. (2015). *Qualitative Evaluation and Research Methods*. Newbury Park, CA: Sage.

Perera, J., & Velummayilum, P. (2008). "Women's Career Choice and Gender Roles: A South Asian Experience," *The Clinical Teacher* 5: 186–190.

Richardson, L. (2015). "Writing: A Method of Inquiry," in Denzin N. K. & Lincoln Y. S. (eds.), *Handbook of Qualitative Research*. Thousand Oaks, CA: Sage, 923–948.

Riddell, A. B., & Nyagura, L. M. (1991). "What Causes Differences in Achievement in Zimbabwean Secondary School?," Policy Research and External Affairs Working Paper 705. University of Zimbabwe: HRRC, 50–53.

Ritzer, G., & Goodman, D. (2015). *Classical Sociological Theory*. New York: McGraw-Hill

Sianou-Kyrgiou, E., & Tsiplakides, I. (2009). "Choice and Social Class of Medical School Students in Greece," *British Journal of Sociology of Education* 30(6): 727–737.

Sikora, J., & Pokropek, A. (2011). "Gendered Career Expectations of Students Perspectives from PISA 2010," OECD–Education Working Papers 57. Paris: OECD Publishers.

Siyakwazi, P., & Dengu, E. (2000). "Factors in the Career Choices of Zimbabwean Sixth Form Students," *Zimbabwe Bulletin of Teacher Education* 9(1): 1–11.

Taylor, J., Harris, M. B., & Taylor, S. (2004). "Parents Have Their Say about Their College-age Children's Career Decisions," http//www.uncwil.edu. Accessed on 28 August 2017.

Teddlie, C., & Tashakkori, A. (2009). *Foundations of Mixed Methods Research: Integrating Qualitative and Quantitative Approaches in the Social and Behavioural Sciences*. Thousand Oaks, CA: Sage.

Tesch, R. (2010). *Qualitative Research: Analysis, Types and Software Tools*. London: Falmer.

Tsvangirai, M. (2014). "An Assessment of Zimbabwe's Achievements since Independence," *Zimbabwean*, 16 December: 18–19.

Walker, S. (2010). *The Effects of School-based Intervention Programs on Student Occupational Aspirations.* Unpublished Master of Education Dissertation. Cape Town: University of Cape Town.

Wilson-Sadberry, K., Winfield, L., & Royster, D. (1991). "Resilience and Persistence of African American Males in Postsecondary Enrolment," *Education and Urban Society* 24(1): 87–102.

Addleton Academic Publishers

Journal of Research in Gender Studies 8(2), 2018
pp. 52–60, ISSN 2164-0262, eISSN 2378-3524 doi:10.22381/JRGS8220183

THE IMPACT OF WITHIN-HOUSEHOLD RELATIVE INCOME ON HAPPINESS: DOES GENDER IDENTITY MATTER?

QIANQIAN SHANG
shangqq1992@163.com
Jinhe Center for Economic Research,
Xi'an Jiaotong University, Xi'an, Shaanxi
(corresponding author)
WAN-HSIN LIU
Kiel Institute for the World Economy, Kiel
YONGKUN YIN
Center for Monetary and Financial Studies, Madrid

ABSTRACT. Based on a household survey from China, this paper analyzes the effect of within-household relative income on happiness, taking into account the role of gender identity. Results show that the probability of being happy decreases significantly with the wife earning more income than her husband for both men and women from the households holding the traditional gender identity, i.e., the husband should be a breadwinner and the wife a homemaker. This is, however, not the case for those households without such a traditional view.

Keywords: happiness; within-household relative income; gender identity; China

How to cite: Shang, Qianqian, Wan-Hsin Liu, and Yongkun Yin (2018). "The Impact of within-Household Relative Income on Happiness: Does Gender Identity Matter?" *Journal of Research in Gender Studies* 8(2): 52–60.

Received 30 November 2017 • Received in revised form 9 April 2018
Accepted 10 April 2018 • Available online 28 April 2018

1. Introduction

Akerlof and Kranton (2000) introduce the idea of "identity" from psychology into economic analysis. Identity is defined as a sense of self and one's recognition of belonging to a certain social category, thus associated with how individuals should behave in these categories. As for individuals, as a couple

within a household, they are usually assigned different gender role categories – as either a "husband" or a "wife." From the traditional view of gender identity, the husband is expected to be a breadwinner and the wife a homemaker. Males are also supposed to earn more money than their wives (e.g., Bertrand et al., 2015). With the societal development over time as reflected in, for example, a closing gender gap in education, it has become more common that the wife may earn more money than her husband (Blau and Khan, 2000). This has gradually challenged the traditional gender identity. Loss in gender identity may not only result in discomfort and incur a reduction in utility of oneself, but also reduces others', such as one's spouse's, utility (Akerlof and Kranton, 2000). Against this background, this paper aims to empirically analyze the effect of within-household relative income on the happiness of the husband or the wife, taking into account whether he or she generally holds the traditional gender identity.

Previous studies on individual's income and happiness show that income, in general, is positively correlated with individual's and/or household's happiness (e.g., Ball and Chernova, 2008; Oshio et al., 2011). Hao and Wen (2013) find, in addition, that the spouse's income affects individual's happiness differently, depending on one's age and income level. Focusing on the relative income within a household, Qian and Qian (2015) show that for men own income share has a more positive effect on own happiness than for women. The potential relevance of gender issues in this income-happiness nexus has rarely been explicitly considered in the previous related literature. There were studies investigating the role of within-household relative income for marriage satisfaction (e.g., Furdyna et al., 2008[1]; Zhang and Tsang, 2012[2]; Zhang et al., 2012[3]; Bertrand et al., 2015), spousal violence (e.g., Macmillan and Garter, 1999; Atkinson et al., 2005[4]) and divorce risk/ marriage instability (e.g. Heckert et al., 1998; Rogers, 2004; Liu and Vikat, 2007; Zhang and Tsang, 2012). One may expect marriage satisfaction to be positively and spousal violence and divorce risk to be negatively related to individual's happiness, thus linking the relative income's effect found in these studies to individual's happiness. But the direct evidence on the nexus between within-household relative income and "individual's" happiness taking into account the relevance of the gender identity in an explicit way is still far from sufficiently investigated.[5] This study aims at providing some first evidence to contribute to filling this gap.

Our research is most closely related to Asadullah et al. (2015) who investigate the determinants of individual's happiness in China and find that women, urban residents, and people with higher income are generally happier than their counterparts. Although their analysis also touches the gender issue, they do not explicitly consider the aspect of the traditional gender identity and the gender-based division of labor in their analysis as we do in our analysis.

Considering the aspect of gender identity explicitly is the most substantial contribution that our analysis makes to help fill the gap in the literature. The topic itself is, however, not only interesting for the academic research but also highly socially relevant. With changing formal and informal rules and norms in societies women have obtained more opportunities to acquire skills and knowledge and to shape their lives on their own over time (e.g., World Economic Forum, 2016). They become less dependent, also with respect to income, on their male family members, particularly their husbands. Many governments in the world have also implemented policies to support women to develop their careers and to take over top and leading positions in science, governments and the private sector. As results, it is becoming more common that wives earn more money than their husbands. This is the case for 27% of American couples according to the American Community Survey 2008–2011 (Bertrand et al., 2015) and about 12% of Chinese couples based on the survey we analyze. These developments in societies have gradually challenged the traditional gender identity and labor division within households over time. On the one hand, one may expect that individual's happiness may increase with increasing household income through the increasing participation of wives in the labor market. On the other hand, the challenge upon the traditional gender identity may affect individual's happiness negatively due to identity loss as suggested by Akerlof and Kranton (2000). Since enhancing human well-being nowadays means not only the increase in material wealth but also the positive development of individual's happiness, gaining more insights into the topic of how income may affect individual's happiness taking into account changing gender identity will help better understand the overall impact on human well-being in pursuit of increasing female participation in labor market and gender equality.

The rest of this paper is organized as follows. We introduce the dataset that we use for the analysis in Section 2. The estimation models are introduced in Section 3 where main results are also presented. Further estimations for robustness check and their findings are provided in Section 4. The paper ends with a brief conclusion in Section 5.

2. Data

Our analysis is based on a representative household dataset from the Chinese General Social Survey (CGSS) for the years of 2010, 2012 and 2013.[6] The annual survey was addressed to one randomly selected representative – male or female – per household. We focus our analysis on responses provided by married and not yet retired individuals.[7] Outlier household samples such as those with household nominal income lower than the official average subsistence level (MCA, 2009, 2011, 2012) and those with extremely high incomes

(top 1%) are deleted from the analysis. As a result, our analysis is based on a pooled dataset, consisting of 4,465 males and 5,002 females.

The main variables of the analysis are constructed as follows. The individual's happiness was originally measured based on a five-level Likert scale with 1 referring to "very unhappy" and 5 "very happy." For our analysis, we first construct a dummy happiness variable (*Happiness_D*) with individuals classified as being happy if their happiness level is higher than 3. Both the individual's and his/her spouse's yearly income – CPI-deflated at the provincial level with the year of 2010 as base year – are considered while calculating the total income of the household (*Income_total*). Taking the individuals' and the total income as base, a dummy variable (*Above_half_wife*) is constructed with 1 referring to a household with the wife earning more money than the husband and 0 otherwise.

We use the interviewees' responses to a survey question to classify them into two groups, with the one group holding the traditional gender identity and the other not. The question asked the interviewees to indicate the extent to which he/she agrees with the following two statements: (1) A husband should be a breadwinner, while a wife should be a homemaker, and (2) For women, a good marriage is more important than a good career.[8] Here again a five-level Likert scale was used with 1 denoting "totally disagree" and 5 denoting "totally agree." Respondents who gave rather neutral answers equal to 3 are deleted from the analysis. From the remaining respondents, those agreeing on one of the two statements, i.e., with answers higher than 3, are grouped as those holding the traditional gender identity and the others not.

3. Estimation Model and Main Results

The Logit estimation model for the analysis is as follows:

$$Happiness_D_i = \alpha + X_i\beta + Z_i\eta + \varepsilon_i \qquad (1)$$

where X is our focus explanatory variable of whether the wife's income is higher than her husband, and Z is a set of control variables derived from the related literature. They include the total income of the household in log (*Log_income_total*), the respondent's age (*Age*) and the square of age (*Age_square*), the respondent's health status (*Health*; 1 (very unhealthy) to 5 (very healthy)), social contact frequency in the previous year (*Social_contact*; 1 (never) to 5 (very frequent)), frequency of engaging in relaxing activities in the previous year (*Relax*; 1 (never) to 5 (very frequent)), and living area (*Rural*; 1 (rural) and 0 (urban)) as well as whether the respondent has children or not (Children, 1 (at least one child) and 0 (no child)). Table 1 presents some basic statistics.

Table 1 Basic statistics

Variable	No. of Obs.	Mean	Std. Dev	Min	Max
Happiness	4465 (5002)	3.858 (3.861)	0.795 (0.819)	1 (1)	5(5)
Happiness_D	4465 (5002)	0.783 (0.777)	0.412 (0.416)	0 (0)	1(1)
Income_total	4465 (5002)	39423 (38672)	35860 (36832)	2500 (2500)	281438 (281438)
Income_wife	4465 (5002)	13332 (13734)	16379 (17122)	0 (0)	201295 (200000)
Above_half_wife	4465 (5002)	0.091 (0.138)	0.287 (0.345)	0 (0)	1 (1)
Age	4465 (5002)	40.202 (37.769)	7.700 (7.319)	18 (18)	59 (49)
Health	4465 (5002)	3.983 (3.847)	0.962 (1.002)	1 (1)	5 (5)
Social_contact	4465 (5002)	2.887 (2.703)	0.993 (1.022)	1 (1)	5 (5)
Relax	4465 (5002)	3.254 (3.347)	0.896 (0.934)	1 (1)	5 (5)
Rural	4465 (5002)	0.402 (0.424)	0.490 (0.494)	0 (0)	1 (1)
Children	4465 (5002)	0.944 (0.960)	0.229 (0.196)	0 (0)	1 (1)
Trad_view	4465 (5002)	0.806 (0.798)	0.395 (0.401)	0 (0)	1 (1)

Source: CGSS. Notes: own calculation. Numbers without brackets are based on responses from men and others are from women.

Estimation exercises are carried out based on data for male and female respondents, respectively. We further differentiate the samples into two groups – one group holding the traditional gender identity (*Trad_view* = 1) and the other group not (*Trad_view* = 0). Results are presented in Table 2. It shows that for respondents holding the traditional gender identity (Column (1) and (3)) the probability of being happy decreases significantly if the wife earns more money than the husband.[9] This finding no longer holds, when focusing the analysis on the respondents not holding the traditional gender identity (Column (2) and (4)) where the corresponding coefficients are found to be insignificant and even positive. Such difference found is consistent with Akerlof and Kranton (2000) and our expectation that loss in gender identity may incur a reduction in utility of oneself but only if the respondents – male or female – hold the traditional gender identity.

Table 2 Logit regression results with robust estimator of variance

	(1)	(2)	(3)	(4)
	Male	Male	Female	Female
	Traditional	Nontraditional	Traditional	Nontraditional
Log_income_total	0.584 (0.065)***	0.487 (0.154)***	0.436 (0.063)***	0.460 (0.153)***
Above_half_wife	–0.261 (0.142)*	0.064 (0.301)	–0.279 (0.111)**	0.166 (0.253)
Age	–0.102 (0.051)**	–0.161 (0.116)	–0.053 (0.057)	0.081 (0.131)
Age_square	0.001 (0.001)**	0.002 (0.001)	0.001 (0.001)	–0.001 (0.002)
Health	0.406 (0.045)***	0.266 (0.108)**	0.419 (0.042)***	0.375 (0.100)***
Social_contact	0.209 (0.044)***	0.058 (0.111)	0.144 (0.042)***	0.244 (0.104)**
Relax	0.106 (0.047)**	–0.192 (0.114)*	0.186 (0.044)***	0.159 (0.102)
Rural	0.271 (0.104)***	0.446 (0.264)*	0.093 (0.096)	0.337 (0.240)
Children	–0.056 (0.216)	–0.163 (0.520)	–0.097 (0.255)	–0.065 (0.453)
Province Fixed Effect	Yes	Yes	Yes	Yes
Year Fixed Effect	Yes	Yes	Yes	Yes
N	3598	852	3992	997
Pseudo R^2	0.097	0.078	0.099	0.120

Note: Robust standard errors are in parentheses; ***/**/* significant at 1%/5%/10% level.

4. Robustness Check

Further estimation exercises based on the same model construction but with different definitions of the key variables considered and based on differently defined (sub-)samples are carried out for robustness check. Firstly, we use 2% (RO(1) in Table 3) and 5% (RO(2)) as key values to delete the top-income outliers to ensure that the estimation results are not driven by our decision for the baseline key value used. Secondly, we use two alternative definitions to construct the happiness dummy variable. Here we either re-categorize the respondents with the happiness level of 3 to be happy (RO(3)) or we use a more strict definition by deleting respondents with the happiness level of 3 from the analysis (RO(4)). Thirdly, we turn to focus on the respondents' happiness intensity and run ordered logit regressions (RO(5)). Moreover, we extend the set of control variables to consider the wife's income (*Income_wife*) in log in addition in order to better understand the role of the wife's income on individual's happiness in general (RO(6)).[10] Our baseline results (Basic) are again shown in Table 3 and they are hardly changed by these alternative estimations.

Table 3 Results of robustness check

	Male		Female	
Regression	Traditional	Nontraditional	Traditional	Nontraditional
(Basic)	–0.261(0.142)*	0.064(0.301)	–0.279(0.111)**	0.166(0.253)
(RO1)	–0.245(0.143)*	0.085(0.304)	–0.284(0.111)**	0.162(0.254)
(RO2)	–0.254(0.144)*	–0.003(0.309)	–0.296(0.113)***	0.181(0.260)
(RO3)	–0.519(0.199)***	0.497(0.457)	–0.336(0.163)**	–0.257(0.393)
(RO4)	–0.555(0.209)***	0.489(0.463)	–0.424(0.166)**	–0.142(0.406)
(RO5)	–0.296(0.122)**	0.105(0.218)	–0.231(0.094)**	0.007(0.178)
(RO6)	–0.266(0.147)*	0.153(0.313)	–0.269(0.115)**	0.167(0.256)

Note: Only the coefficients of our key variable of interest "Above_half_wife" are shown here; Robust standard errors are in parentheses; ***/**/* significant at 1%/5%/10% level.

5. Conclusion

Different from the previous literature, the paper investigated the relative income-happiness nexus by explicitly considering the fact of whether the respondents hold the traditional gender identity or not. We divided the observations into two groups with the one group which holds the traditional gender identity and the other not. Comparable estimations were run for different groups separately. Results showed that the probability of being happy decreases significantly, if the wife earns a higher income than her husband for the group holding the traditional gender identity but not for the group without such a view. The finding stayed robust after considering alternative estimations. This finding was in line with the argument of Akerlof and Kranton (2000) that identity loss would reduce one's utility.

Our analysis helps not only fill the above mentioned literature gap to some extent. It is also highly socially relevant. It suggests that the challenge upon the traditional gender identity needs to be taken seriously in pursuit of gender equality. Policies may not only focus on providing support to women and households to help female workers be better integrated into the labor market and the society. Measures need to be implemented to help transform the traditional gender identity shared among many individuals and households. Only in this way, the pursuit of gender equality will not just lead to a higher material wealth of women but also help deal with the negative happiness impact of the wife's higher income in relation to her husband's. Which measures may come into consideration in this regard is worth being further investigated in the future.[10]

Two limitations of the paper, driven by data constraints, are worth mentioning. Firstly, our analysis cannot investigate how one's loss of gender identity may affect the utility of one's spouse. Secondly, we cannot investtigate whether the validity of the relative income-happiness nexus may also depend on the related view of individuals' social networks. Both limitations can be perceived as opportunities for the related future research.

NOTES

1. Furdyna et al. (2008) consider work-family gender ideology for their analysis. They find some support for a negative association of wife-to-husband income ratio and the marital happiness particularly for women with more traditional gender ideology. Different from our analysis, they consider marital happiness instead of individual's happiness, they use an interaction term to integrate the aspect of gender ideology in their study and their study relies on responses from women only.

2. Zhang and Tsang (2012) find that marital perceived equity in areas such as finances, housekeeping, care and socialization of children etc. can help reduce the impact of wives' relative income on marital instability, while no such mediating effect can be found on marital happiness. It is worth being noted, however, that a couple may feel that they share the responsibilities equally (a higher perceived equity) but this can still be not in line with their internalized gender identity. Thus, perceived equity can still have different impacts on marital satisfaction and/or marital instability for interviewees with different views of gender identity. The difference between equity and identity is, however, not taken into account in Zhang and Tsang (2012).

3. Zhang et al. (2012) use a dummy variable with "1" referring to a household with the wife earning more money than the husband. This is similar to what we do for our analysis (s. Section 2). They do use the concept of the traditional gender identity to support the interpretation of their finding of a negative impact of the wife's relatively higher income on marital satisfaction. However, they do not consider the gender identity explicitly for their analysis as we do (s. Section 2 and 3). Moreover, their analysis is based on a survey of 612 samples only. The sample size is much smaller than that of our analysis.

4. Atkinson et al. (2015) consider men's gender ideology for the analysis. They find that wives' share of relative incomes is positively related to spousal violence only for the cases with husbands having traditional gender ideologies. Differently, our analysis considers individual's happiness instead of marital abuse and we take into account both men's and women's view of gender identity.

5. One exception here is Van der Meer (2014) who considers interviewee's income proportion for his/her subjective well-being in his analysis. He does consider some gender identity issues in the analysis and controls for "modern family values" and the "centrality of the family" in the regressions. In this way, he does not, however, investigate whether the impact of interviewee's income proportion on his/her subjective well-being might be different, if he/she may have different family values and different attitudes towards families.

6. The survey data for the year of 2011 cannot be used, since the key question which we use to construct the variable for the individual's view of gender identity was not included in the survey of that year.

7. The official retirement ages (60 for male workers and 50 for female workers, see SC (1978)) are used here.

8. In the survey there were more than these two statements for which interviewees' agreement was asked. But only these two statements considered here are clearly linked to some key aspects of the traditional gender identity.

9. Tests find no significant effect difference in scales between male and female respondents.

10. No statistically significant impact of the additionally considered variable – the wife's income – on individual's happiness can be found here.

11. The study of Inglehart et al. (2014) based on World Values Survey may be considered as a first key step in research in this direction where the authors find that a combination of cultural, economic and genetic factors would determine the levels of tolerance of societies and their openness to gender equality.

Acknowledgements
We thank the editor, the two referees and Frank Bickenbach for their useful comments and suggestions for the previous versions of the paper.

REFERENCES

Akerlof, G. A., and Kranton, R. E. (2000). "Economics and Identity," *Quarterly Journal of Economics* 115(3): 715–753.

Asadullah, M. N., Xiao, S., and Yeoh, E. (2015). "Subjective Well-being in China, 2005–2010: The Role of Relative Income, Gender, and Location," *China Economic Review*. doi:10.1016/j.chieco.2015.12.010.

Atkinson, M. P., Greenstein, T. N., and Lang, M. M. (2005). "For Women, Breadwinning Can Be Dangerous: Gendered Resource Theory and Wife Abuse," *Journal of Marriage and Family* 67(5): 1137–1148.

Ball, R., and Chernova, K. (2008). "Absolute Income, Relative Income, and Happiness," *Social Indicators Research* 88(3): 497–529.

Bertrand, M., Kamenica, E., and Pan, J. (2015). "Gender Identity and Relative Income within Households," *Quarterly Journal of Economics* 130(2): 571–614.

Blau, F. D., and Khan, L. M. (2000). "Gender Differences in Pay," *Journal of Economic Perspectives* 14(4): 75–99.

Furdyna, H. E., Tucker, M. B., and James, A. D. (2008). "Relative Spousal Earnings and Marital Happiness among African American and White Women," *Journal of Marriage & Family* 70(2): 332–344.

Hao, S., and Wen, W. (2013). "How a Spouse's Income Influences One's Own Happiness? An Empirical Analysis Based on China General Social Survey (2006)," *Research on Economics and Management* 3: 29–38. (in Chinese)

Heckert, D. A., Nowak, T. C., and Snyder, K. A. (1998). "The Impact of Husbands' and Wives' Relative Earnings on Marital Disruption," *Journal of Marriage & Family* 60(3): 690–703.

Inglehart, R. F., Borinskaya, B., Cotter, A., Harro, J., Inglehart, R. C., Ponarin, E., and Welzel, C. (2014). "Genetic Factors, Cultural Predispositions, Happiness and Gender Equality," *Journal of Research in Gender Studies* 4(1): 32–100.

Liu, G., and Vikat, A. (2007). "Does Divorce Risk in Sweden Depend on Spouses' Relative Income? A Study of Marriages from 1981 to 1998," *Canadian Studies in Population*, 34(2), 217–240.

Macmillan, R., and Gartner, R. (1999). "When She Brings Home the Bacon: Labor-force Participation and the Risk of Spousal Violence against Women," *Journal of Marriage and the Family* 61(4): 947–958.

Ministry of Civil Affairs of the People's Republic of China (MCA) (2009, 2011, 2012). *Statistical Report of the People's Republic of China on the Development of Social Services 2009, 2011 and 2012*.

Oshio, T., Nozaki, K., and Kobayashi, M. (2011). "Relative Income and Happiness in Asia: Evidence from Nationwide Surveys in China, Japan, and Korea," *Social Indicators Research* 104(3): 351–367.

Qian, Y., and Qian, Z. (2015). "Work, Family, and Gendered Happiness among Married People in Urban China," *Social Indicators Research* 121(1): 61–74.

Rogers, S. J. (2004). "Dollars, Dependency, and Divorce: Four Perspectives on the Role of Wives' Income," *Journal of Marriage and Family* 66(1): 59–74.

State Council of the People's Republic of China (SC) (1978). *State Council's Provisional Regulations on the Settlement of Socially Disadvantaged Cadres and on Workers' Retirement and Resignation*. State Council Announcement No. 104.

van der Meer, P. H. (2014). "Gender, Unemployment and Subjective Well-being: Why Being Unemployed Is Worse for Men than for Women," *Social Indicators Research* 115(1): 23–44.

World Economic Forum (2016). *The Global Gender Gap Report 2016*. Insight Report. Geneva.

Zhang, H., and Tsang, S. K. M. (2012). "Wives' Relative Income and Marital Quality in Urban China: The Role of Perceived Equity," *Social Justice Research* 25(4): 406–420.

Zhang, H., Tsang, S. K., Chi, P., Cheung, Y. T., Zhang, X., and Yip, P. S. (2012). "Wives' Relative Income and Marital Satisfaction among the Urban Chinese Population: Exploring Some Moderating Effects," *Journal of Comparative Family Studies* 43(2): 185–199.

Addleton Academic Publishers

Journal of Research in Gender Studies 8(2), 2018
pp. 61–88, ISSN 2164-0262, eISSN 2378-3524 doi:10.22381/JRGS8220184

THE CONSEQUENCES OF BLURRED BOUNDARIES BETWEEN PRIVATE AND PUBLIC SPHERES IN PATRIARCHAL SOCIETIES: EVIDENCE FROM DRUZE WOMEN IN ISRAEL

EBTESAM BARAKAT
ebtesam1970@gmail.com
The Ben Gurion Research Institute
for the Study of Israel and Zionism,
Ben-Gurion University of the Negev
AMAL JAMAL
ajamal@post.tau.ac.il
School of Political Science Department,
Government and International Affairs,
Tel-Aviv University
ORNA SASSON-LEVY
o.sassonlevy@gmail.com
Sociology and Anthropology Department,
Bar Ilan University

ABSTRACT. This paper explores the complexities of the relationship between the public and private spheres and their ramifications on women's status in the context of patriarchal societies. It utilizes the Druze society in Israel, as a patriarchal society in order to illustrate its theoretical argument; namely that the colonization of the public sphere by the patriarchal social norms of the private sphere, render women's resistance and struggle for autonomy in the private sphere a precondition for a more equal public one. The Druze community is oppressed and neglected by the Israeli state, and maintains its unique identity by employing a strict and secretive religious lifestyle. The dominant position of religion in everyday life and its close ties to the Hamula (familial) regime, create a social structure that does not distinguish between the private and public spheres. Rather, the private sphere's norms, which are dictated by the symbiotic ties between religion and patriarchal connectivity, dominate the entire public sphere. Druze women's narratives stress the fact that the spreading of the norms of patriarchal connectivity, onto the public sphere poses limitations and obstacles on women in terms of their mobility, education, and employment. Their narratives suggest that women in patriarchal conservative societies must fight first for equality within the private sphere, to prevent patriarchal values from taking

control of the entire collective public sphere. By bargaining, which is shaped by their intersectional positionality in the social structure, women seek to weaken the symbiotic relationship between religion and Hamula regime in order to gain better maneuvering spaces as autonomous subjects.

Keywords: patriarchal society; Druze woman; Israel; private/public sphere

How to cite: Barakat, Ebtesam, Amal Jamal, and Orna Sasson-Levy (2018). "The Consequences of Blurred Boundaries between Private and Public Spheres in Patriarchal Societies: Evidence from Druze Women in Israel," *Journal of Research in Gender Studies* 8(2): 61–88.

Received 2 January 2018 • Received in revised form 16 April 2018
Accepted 17 April 2018 • Available online 10 May 2018

1. Introduction

This paper explores the unique complexities of the relationship between the public and private spheres and their ramifications on women's status in the context of the patriarchal Arab-Druze society in Israel. By exploring the narratives of Druze women in Israel, we explore the structure of power relations in a patriarchal society, and focus on the spheres of action available for women. Druze society in Israel, which is oppressed and neglected by the state, maintains its unique identity by employing a strict and secretive religious lifestyle, which separates them from both Arabs and Jews in Israel.

The dominant position of religion in everyday life and its close ties to the *Hamula* (tribal) regime create a social structure that blurs the boundaries between the private and public spheres, in which the latter is colonized by the former. The private sphere's norms, which are dictated by the symbiotic relationship between religion and *Hamula* structure, take over the entire public sphere. Thus, the distinctly patriarchal private sphere is replicated by the entire social structure, and particularly the public sphere. This process is legitimized by the state. Albeit its democratic pretense, the state legitimizes *Hamula's* considerations over the appointment for public offices in the Druze community. This situation limits the realm of individual rights, and the main victims are disempowered populations, and particularly women from small *Hamulas*.

From the point of view of Druze women, as reflected in their interviews, it is made clear that the spreading of private-sphere norms into general society limits them in terms of mobility, education, and occupation. Their narratives suggest that they strive to create public sphere – one that is not masculine biased, as the public sphere criticized by scholars in Western societies; Rather, Druze women struggle to establish a public sphere in which the influence of the religion–*Hamula* regime ties is reduced, allowing women more autonomy and control over their own lives. Therefore, Druze women's struggle for

equality and autonomy has to take place first at the private sphere in order to transform the public sphere and enable their legitimate integration into it. Their struggle, or rather, their bargaining with the patriarchal social structure is shaped by their intersectional location in it. Their resistance and struggle aims at weakening the symbiotic relationship between religion and *Hamula* regime in order to gain better maneuvering spaces as autonomous subjects.

The paper explores the relationship between the private and public sphere in Druze society in Israel in light of the literature available on various contexts. While feminist liberal theory argues that the separation between the private and public spheres in Western societies has been a key ideological conceptualization that legitimated gender inequality, we argue that in contrast, in patriarchal societies, blurring the boundaries between these two spheres can also be a major source of gender inequality.

The paper opens with a discussion of the separation between the private and public spheres, and its implication over women in different contexts. Then, we shed light over the intersectionality of gender relations in Druze society in Israel. The third section presents women's strategies in three aspects of life: mobility, education, and employment. We demonstrate that, in all three aspects, the symbiosis between religious and *Hamula* considerations are the top priority of decision-makers, and thus women find it hard to act in the public sphere as autonomous individuals. Therefore, they call to decouple this symbiosis as a precondition for an effective struggle for gender equality in patriarchal societies.

2. Framing the Public and the Private in Liberal versus Patriarchal Societies

The public/private divide as drawn by modern liberalism affects everything from how power is attained and exercised to how women are treated (Cole 2003). The "classic" liberal feminist argument is that this (mostly symbolic) separation between the private and the public spheres is a major source for gender inequality in industrial Western societies (Elshtain, 1993).

The private sphere, or the "intimate sphere," in the words of Shyla Benhabib (1998: 96), is where one meets "the daily needs of life, of sexuality and reproduction, of care for the young, the sick and the elderly." These needs are typically recognized by modern thinkers as belonging to the domain of the household. In addition, Benhabib sees moral and religious conscience as belonging to the private sphere, referring to the separation between religion and state and the granting of autonomy to the individual in determining such matters. Indeed, Benhabib points out that many modern thinkers reveal a tension between their vision of a patriarchal domestic realm and the values of equality and consent in the political public sphere (Benhabib, 1998: 86).

However, the differentiation between the private and the public did not manage to disconnect the public sphere from the patriarchal commitments of the private sphere, despite the fact that the public sphere was theorized as free of patriarchal repercussions.

Western public sphere is often defined as a place in which state and society meet in order to conduct a rational, critical and dynamic public discussion, allowing citizens to express their opinions about the state's function (Habermas, 1973/75). This approach is based on the perception of the individual as having commitment to the public, collective interests (Fraser, 2007). According to this perception, the public sphere is assumed to be universal, objective and neutral (Castells, 2008). Yet, feminist criticism exposes the continuous masculine bias of the public sphere, which makes it harder for women to participate in it as equals (Fraser, 1990). Thus, the distinction between the private and the public sphere is based on a series of gender dichotomies, which perpetuate gender inequality, and particularly exclude women from the public sphere and power centers.

This argument is further supported by Sylvia Walby (1990), who argues that: "The household does not cease to be a patriarchal structure but it is no longer the chief site of women's oppression. Rather, the state, which has a systematic bias towards patriarchal interests in its policies and actions, should be regarded as the new Patriarch" (21).

If the state serves as the new patriarch, women's citizenship is obviously unequal to that of men (Lister, 2007), and this inequality is reflected in many aspects of life. Thus, the awareness to the consequences of the separation between the private and the public spheres has become a strategy that directs women's struggles for equality in Western societies. As part of these struggles, women demand the uprooting of the patriarchal biases from the public sphere, to allow them to be recognized as autonomous, equal citizens.

Despite the importance of this discussion of Western societies, it provides only a narrow discussion, since it does not address feminist dilemmas in non-Western societies, such as those of the Middle-East. These societies have not followed the lead of Western societies when it comes to the differentiation between the public and the private spheres. Joseph (2000) argues that the establishment of post-colonial states in the Middle-East saw the development of three overlapping spheres: the state sphere, the civil, non-governmental sphere, and the *Hamula* (familial) sphere. The civil non-governmental sphere is an interim sphere, connecting the state and the private spheres through patriarchal connectivity. When the patriarch is the connecting link between the state and the family, the boundaries between them are blurred (Joseph, 1993). In the structure of patriarchal connectivity, women (as well as men) exist as connective selves, who belong to the patriarch. Thus, in Middle Eastern states, the values of the strict patriarchal private structure, which

define the realm of rights, are replicated de-facto in the public sphere as well. This replication carries major ramifications on the status and maneuvering spaces of women. The private sphere norms, which underline familial loyalty, are the ones defining men's and women's chances of development. However, since men are the dominant agents in the patriarchal social structure and women are considered secondary, finding employment through familial ties, subordinate women to *Hamula* considerations. The latter becomes the main social agent with the power to mobilize, exclude, and affect the entire public order (Joseph, 2000). Accordingly, when women manage to integrate into the public sphere, it is only through the cultural social patterns common in the private sphere (Moghadam, 2004).

This discussion of exclusion patterns of women in patriarchal societies has attracted research attention of scholars studying post-colonial societies. Eickelman and Salvatore (2004) disagree with Joseph, claiming that the public sphere is neither a prerogative of Western modern societies, nor of democratic political systems. Advanced levels of education and the rise of new media outlets throughout the Muslim world contribute to the emergence of a public sphere, in which large numbers of people, and not just the educated, political, and economic elite, want a say in political and religious issues. Notwithstanding this argument, Eickelman and Salvatore argue that the public good in Middle Eastern societies is increasingly defined within the parameters of Islam. This means that the articulation of the common good does not require the equality of all participants in order to raise a claim to truth and justice. On the contrary, as Cole (2003) demonstrates, radical Muslim fundamentalists code women as essentially subjective and private, and therefore excluded from the public sphere. By examining the radical Islamic movement in Afghanistan – the Taliban – Cole claims that instead of instituting a public sphere, the Taliban sought to de-privatize religion, and inscribe religious codes on the public spaces. Thus, Taliban conducted a vast re-privatization of domesticity, a realm to which they assigned to women.

Hence, in patriarchal societies the dialectics between the private and the public sphere could vary. Nonetheless, with the reemergence of religious influence in these societies, there is a clear pattern of colonization of the public sphere by the private one, by which the patriarchal, tribal, and religious social structures are re-institutionalized.

This type of colonization of the public sphere by values transferred from the private sphere is also true in the case of the ultra-orthodox Jewish sector in Israel. Leaders of this separatist sector attempt to create alliances with the "liberal" state, in order to expand the influence of their internal patriarchal practices to new spheres, such as public transportation and professional training (Stopler, 2015). While the separatists view gender-separated buses and courses as a private-communal space, in which the ultra-orthodox com-

munity can exercise its unique lifestyle, the anti-separatists, mostly feminist-progressive, view them as part of the public-state sphere, which was unequivocally committed to gender equality up until lately (ibid.).

The gender separation in the public sphere of the ultra-orthodox Jewish community reveals a clash between two forces: on the one hand, the desire of ultra-orthodox leaders supported by the state to replicate the gender separation and male-biased practices from the private to the public sphere; on the other hand, the feminist-progressive ideology, which stress that the state should try to eliminate the existing patriarchal practices, and surely not assist in expanding them. The Supreme Court, in turn, refuses to discuss gender separation in public transportation and professional training, choosing the "compromising liberalism" way, as a practical and ideological choice (Stopler, 2015).

Expanding the arguments of the above-mentioned scholars, in the present study we emphasizes that women in patriarchal-conservative societies, such as the Druze society, suffer from structural inequality, especially in the public sphere. This inequality is institutionalized as a result of the blurred boundaries between the norms and beliefs dominant in the private sphere which are deeply patriarchal, and those that ought to characterize the public sphere. Women suffer from this institutionalized discrimination in the public sphere due to the unique and deeply rooted connection between *Hamula* affiliation and religious norms, supported by the state under the pretense of respecting particular minority cultures.

This state policy renders the religious establishment a key element in enhancing patriarchal connectivity as a major mechanism of power. As we will show later, the religious establishments, fully endorsed by the state, shape the social structure, thereby limiting women's autonomy. This is especially true since the symbiotic relationship between religion and the *Hamula* structure shapes the entire social space. Hence, the Druze women's narratives discussed later demonstrate that blurred boundaries between the private and public spheres can become a source of gender inequality and women oppression, even when the separation itself cannot guarantee liberation from the patriarchal commitment of the public sphere, as illustrated in Western feminist literature.

3. Palestinian Women Citizens in the Jewish State[1]

When exploring the specific context of Palestinian society in Israel, one cannot ignore the dynamics between the Jewish state and its minorities. Legally, the State of Israel is defined as Jewish and democratic. As Jamal (2011) argues, this definition means that Palestinian citizens are positioned outside of the political community. They are perceived as strangers in their

own homeland and a threat to the identity of the Jewish state. Thus, the state robs them of their sovereignty and resources (Jamal, 2011; Yiftachel, 1997). The Palestinian citizens are marginalized through supervision and differentiation, dependency and co-optation (Lustick, 1985). While the practice of differentiation has fixated the patriarchal social structure in the Palestinian society in Israel, the co-optation practice has empowered individual patriarchal leaders (Hassan, 1999; Shalhoub-Kervorkian and Daher-Nashif, 2013). The aim of these practices is to prevent the rise of a young generation of educated leaders who challenge the state's definition and policies. This state policy preserves the patriarchal *Hamula* structure, thus maintaining the control of men over women. The limitation of women to the private sphere is turned into a means of "defending" them against racism, subordination, and oppression by the state's institutions. Scholars stress that state policies have not only made it harder for Palestinian women to integrate into the labor market, but also enhanced the phenomenon of femicide, through the legitimization of the cultural patriarchal control (Abu-Rabia-Queder, 2016; Hassan, 1999).

The narratives of women interviewed for the current research suggest that women's oppression is particularly blatant in Druze society. Druze society in Israel is a small minority, which is differentiated from both Jewish and Arab societies in Israel. While the Druze speak Arabic and maintain a similar lifestyle to the one of Arabs in Israel, the state has implemented a "divide and conquer" policy by enacting specific laws for Druze: a mandatory military service law for Druze men (1956), which created a society whose main source of income is the men's long-term military service; an independent system of Druze Shari'a courts and the recognition of the Religious Council as representing the Druze sector (1962); and an independent Druze education system (1975) (Firro, 1999). These policies contributed to the differentiation of Druze from the general Arab society in Israel, while they continue to suffer from the same discriminatory and neglect policies of the state.

As a small, discriminated community, Druze society relies on its religion as the main means of maintaining its identity. Druze religion is secret, and only religious Druze men and women have access to its scriptures. The Religious Council, the informal interpreter of religious scriptures, derives its authority from the state. In addition to its dominant role, the Religious Council cooperated with the state in enacting a law in 2011, according to which the state recognized Druze *Imams* (clergymen) as state officials, thus legitimizing the use of religion as a "private" cultural means in preserving the symbiotic *Hamula*-religious power structure. This law enabled the Religious Council, a strictly-male body, to distribute new positions based on family affiliation in the entire community, thereby turning itself not only into the official interpreter of religion, but also the central institution determining the predominant patterns of social loyalties. Religious services provided by *Imams* are based

on familial ties and therefore central in preserving the patriarchal social norms. Familial social loyalties play a major role in the entire division of labor in society, including in non-religious public institutions, such as municipal and educational institutions, which are the major employers in the Druze community. Hence the special ties between the *Hamula* structure and religious institutions become apparent.

One means of maintaining the unique characteristics of Druze society is a strict regime of the woman's body through formal and informal religious rules that require women to keep stringent modesty rules, and forbid them from traveling on their own. These religious rules, which limit women to the private sphere, are enforced by posing religious sanctions on women and their families. As a result, gender inequality is maintained by the symbiosis between the religious establishment and the *Hamula* structure, which is replicated from the private sphere into the general collective sphere.

Thus, Druze women demanding to liberate the private sphere and thereby also the public spheres from masculine bias, through reducing the influence of the religion–*Hamula* power structure could be marked as progressive women and therefore an interesting unique case to explore. In this regard, the women's narratives suggest that deconstructing the religion–*Hamula* symbiosis and weakening its transmission from the private into the public sphere are required for Druze women to achieve more autonomy in their life choices. In other words, through their individual accumulating agencies, Druze progressive women strive to create the necessary conditions to attain their right for equality in both the private and public spheres.

4. Gender and Religion in the Druze Society in Israel

The Druze society in Israel is secluded both geographically and culturally. In 2016, 1.6% of Israel's population and 7.8% of the Arab population in Israel were Druze (Central Bureau of Statistics, 2017). The Druze community is comprised of about 130,000 people, who reside in the Northern parts of Israel, in the Galilee and the Carmel Mountains.

The Druze community is similar to the entire Arab population in Israel by being a patriarchal society with a clear and strong patriarchal social structure. But unlike the Arab community, the Druze lack an overall social and political organization, apart from the religious one, which dominates community life. The centrality of religion in this community's life renders civil institutions, such as municipalities, rather secondary in determining social norms and very deeply influenced by the religious establishment.

Druze society is divided into two key groups: 80% of them are non-religious (not exposed to religious scripts), while the other 20% are defined as religious.[2] While this distinction is not dichotomous, the Druze in Israel

(unlike in Lebanon) have almost no secular sector. Members of the non-religious majority group is expected to join the religious group at some point in their life, especially among women and they can do so at the cost of submitting to the strict religious code.

Druze identity is predominantly limited to religious affiliation. Druze religious and political elites, tend to highlight the unique traditions of the community, thereby seeking to guarantee its internal cohesion, especially in face of the intensive modernization and globalization processes influencing the young generations.

The religious code in the community is very strict. For example, religious people will be excluded from religion for a period of weeks to a few months if they participate in a wedding party (even if the wedding is of their son or daughter). Religious parents will also be excluded from religion for a pre-defined period, if their daughter spends the night away from home, even when she does so as part of her academic studies. Excluded people are not allowed to visit the Hilwe (the Druze prayer house) and attend public prayer. They are also prohibited from reading the holy books. Thus, the religious exclusion also carries social implications. The religious code is determined by men and is strictly applied to women. One could argue that in theory, the Druze religion treats women relatively fairly – a woman is allowed to gain religious education like a man, ask to divorce her husband, and when a woman is divorced by her husband for no reason, she is entitled to half of his possessions (Abu-Zaki, 1997). Yet, in practice, the religious leaders are the ones authorized to interpret religious and social rules into practice (Abu-Jawhar, 2008), and their rulings not only often go against the formal religious rules, but are also strongly influenced by the religious-*Hamula* power structure.

Religious leaders employ two main practices to control the Druze community: The first is religious banishment, which can last anywhere from weeks to sometimes months, in which religious Druze men and women are excluded from religion for their or their daughter's inappropriate behavior, such as their daughter spending the night away from home.[3] Another practice is the prohibition against prayers for a deceased person when he or she dies as "non-religious" person. This practice carries religious-social meaning, which relegates the deceased and his/her family to a lower religious status. The main aim of these practices is to encourage Druze people to join the religious group at an early age, and thus preserve the Druze religious way of life.

Beyond the supervision of the religious establishment, Druze society employs a strict form of social supervision. As a small community, marriages in and between *Hamulas*, as well as in and between villages, have created a tight and closed-off social network, with little individual autonomy and freedom (Hassan, 2011). Kinship ties are key in the interactive intra-village,

intra-regional, and inter-regional social system, which connects and solidifies Druze community (ibid.). This tight relation network further empowers the collective, with its guiding values and norms, while marginalizing the individual.

And thus, the cooperation between the state, the *Hamula* regime, and the religious establishment leads to strict supervision over Druze women, rendering them almost totally dependent on a complex patriarchal social structure. Yet, many of the women search for venues of resistance, either in manifested, or, more often, in hidden ways. These patterns of resistance utilize opportunities made available by the modern job market, especially in the educational system and in the growing commercial sector. Women's efforts made to counter the strict patriarchal social structure also utilize the balances of power between families, especially those related to the democratic competition between them during elections for the municipalities.

5. Research Methodology

The current paper is derived from a larger study that explored the social and religious challenges faced by Druze women in Israel in their daily life (Barakat, 2015). We based the research on a feminist narrative approach, which stresses that marginalized women are capable of identifying the power relations and resist them. Our view of Druze women is based on the theory of intersectionality, which sees women's identities as constructed at the intersection of several power axes, mainly gender, religion, and class (Crenshaw, 1991).

The study is based on semi-structured interviews with 60 Druze women aged 30 to 50 years, which were conducted between 2010 and 2012. Out of the women interviewed, 30 were college-educated, while 30 were not. Out of the group of educated women, 19 were employed and 11 were unemployed. Among the uneducated women, 16 were employed and 14 were not.

The interviews were conducted by the first author, a Druze woman herself. They were conducted in Arabic, the native language of both the interviewer and the interviewees; and recorded and transcribed into Arabic. The women were reached through a snowball method. Most women chose to be interviewed in their own homes, while their family was away, thus creating a relaxed and open atmosphere. Only one woman refused to be interviewed, explaining that she was scared she would accidently reveal the secrets of the religion to the interviewer – a non-religious Druze.

At the beginning of each interview, the women were asked to describe cases in which they felt discriminated, and then describe how they handled them. Later, the interviews progressed according to interviewees' preferences,

with questions regarding their coping strategies with oppression in various aspects of life.

It seems that the gender and cultural similarities between the indigenous researcher and her subjects allowed her to derive a larger amount of information concerning the nature of cultural, social and gender relations in the researched society (Abu-Rabia-Queder, 2016). Yet, the researcher, versed in feminist literature, did not take any statement at face value, requesting examples, clarifications and explanations whenever necessary, rendering herself into an "in between" position, having to bring her own personal story into the encounter (Massumi, 2002).

Due to the sensitivity of the subjects at hand, the authors secured research ethics by omitting any detail that might reveal the identity of our interviewees. They are presented under pseudonyms; their villages and locations were omitted, as well as other revealing details.

The interpretative analysis of the interviews was conducted on three levels. First, we looked at the individual story, ascertaining the central themes that emerged from the women's interviews (Strauss & Corbin, 1990). Second, we re-read the interviews with a special attention to the different spheres of life that were mentioned in the interviews: *Hamula*, religion, work and occupation, higher education, and mobility. Finally, we analyzed the multiple power relations faced by women in the unique context of the Druze society in Israel.

Though the authors' feminist agenda is clear and elaborated, the feminist interpretation of the women's stories raised many conflicts during the writing process. Specifically, we were wondering whether our interpretation will be accepted by the women we interviewed, or not. Is our interpretation too "objective" or too "critical"? Hence, we went back to three of the women and let them read our interpretation. One of them said briefly: "Well, this is the truth of my life." The other two who did not like our tone, still agreed that our analysis reflects their harsh reality as Druze women in Israel.

6. Realms of Oppression and Resistance Practices

Druze women are forced to cope with intersecting realms of oppression. This intersectional oppression limits women's possibilities for action in three main areas that appeared in the interviews again and again: mobility, education; and labor market integration. As we show, these three areas are interconnected and mutually effective. By discussing these three issues, we show how blurring the separation between the private and the collective spheres hinders – and sometimes blocks – the academic and professional development of non-religious Druze women. The following data mirrors the patterns of counter-hegemonic behavior of women that seek to reveal the structural gender inequality caused by the symbiosis between religion and Hamula,

also when they cannot change them alone. The revealing of this symbiosis, which is intersectional and is viewed by all women as limiting their freedom, is presented as part of the efforts to transform social reality and lead to better opportunities for women, at least in the coming generations. The data demonstrates how intersectionality positioning, and especially marital status and higher education, shape the contours of women's differential struggles.

7. Religious Restrictions on Women's Mobility as Supervision of Sexuality

The oppressive and humiliating rules against women are found everywhere in the Druze rural sphere, particularly in the realm of body and sexuality. To supervise women's sexuality, strict norms limit women's mobility, especially outside the village. A woman (religious and non-religious alike) who needs to travel beyond the village boundaries is required to be accompanied by a male relative (*Mahram*), who can be her husband, her son, her nephew, her brother, or her father. Najat, a 39-year-old employed widow and mother of three, who is uneducated and non-religious, described the strict supervision over her departures from the village:

> Only about two years ago I started driving outside of the village. I waited ten years, until my oldest son grew up. He is 17 years old now [...] if they see me driving outside of the village, everyone will talk about it, even if my kids are with me. Look, I drive, but it's not easy being a driving widow. [...] They'll say: 'she is a widow, she has her own car, she went outside of the village, she was laughing while driving, she was talking on the phone' and so on.

Najat, as a woman with no academic education, illustrates the lack of boundaries in inter-generational role division: a boy, who is still living in his mother's house, supervises her movement, which is deeply related to her sexuality. The common perception in Palestinian society is that men at every age are responsible for supervising women's sexuality (Hassan, 1999). This socio-religious demand for a male supervision over women is present in every sphere of life denying women's right of movement, preserving the patriarchal structure in both private and public spheres. This pattern of conduct hardly changes even when women are the breadwinners and they are actually the parents that are supposed to supervise their children and not the other way around.

Unlike Najat, Kamer, a 36 year-old educated woman, who works in a senior professional position is aware of the fact that her education and job allow her to expand her sphere of mobility and leave the village on her own, without a men companion. Nonetheless, this right of mobility depends on her husband's permission:

> When I go to work meetings in the center of the country, I'm constantly stressed, I'm worried that someone from the village will see me, because no one in the village knows that it's part of my job. [...] I'm afraid to be involved in a car accident, because what would they say about me in the village? [....] My husband knows about it [...] I don't know how my parents will deal with it, particularly my father, who wants to drive me if I go further than Acre [a nearby town].

Kamer's quote alludes to the mechanism of village gossip, which, together with religious leaders' rules, maintains the supervision over women's bodies and sexuality. Although being educated has an impact on the spaces allowed for mobility, supervision remains in the hands of the men and in accordance with the rules set by the religious establishment and the patriarchal social structure, thus lessening women's opportunities of reaching powerful and decision-making positions.

This constant supervision engages women in a continuous negotiation over their mobility with their family/society/religious leaders, particularly when it comes to leaving their village. The demand that young women be accompanied by men relatives makes women dependent on these relatives, including their old parents, when they want to be mobile. This dependency mirrors a collective suspicion in women's behavior, which is justified by the will to "protect" the woman's sanctity, viewed as a collective male responsibility.

The comparison between Najat, an uneducated, widowed woman, and Kamer, an educated and married woman demonstrates that the former is in a much weaker bargaining position with patriarchy compared with the latter. Although it is very hard to determine if being educated or being married is the main determinant in enabling Kamer more spaces of freedom, it is possible to see that the combination between high education and marriage strengthen women's position in their negotiation to expand their freedom and autonomy.

According to the norm, women can leave the house during the day, as long as their parents are aware of their whereabouts. But after sunset, staying outside of the house is seen as sexually promiscuous. Thus, women, especially unmarried ones, are expected to come back every night to the sphere supervised by her parents – her parents' house.

Therefore, a women's decision to pursue higher education is not a matter of personal choice. Gaining academic skills or determining intellectual preferences are deeply related to the common mobility codes. The symbiosis between religion and the patriarchal social structure has major impact on determining women's opportunities for higher education based on mobility restrictions.

Many interviewees noted that their parents accepted their desire to study, but employed strict restrictions on their traveling to university and staying away from home at night. Two trends were noticed in this aspect: First, religious fathers tend to refuse their daughters' request for higher education to avoid the religious sanctions; second, academically educated fathers tend to encourage their daughters to graduate high school and attain higher education, while also demanding that they maintain the social taboo and come back home every night.

Lara, a 36 year-old, employed and married woman said:

> Throughout my studies, my mother was excluded from religion. I had to leave the house at 6:00 AM each day [...] and I would leave the university at 6:00 PM [...] throughout my years of studies, I had scruples because of my mother's status in the village, and the fear that something would happen and she would die as a woman excluded from religion.

Mira told a similar story about her challenge against the intervention of religious leaders when she decided to gain higher education. Mira, 34, married, a mother of three, and a salaried employee, told us:

> Looking back, since I had already convinced my father that I could study in the university, and my mother had already been excluded from both collective and individual religious practices, I couldn't have studied in different universities; I couldn't have studied something other than social work. […] Our religion shapes our lives. But today, I think differently. I believe I am the one who should make my own decisions, instead of letting others decide for me, in the name of religion. Back then, I didn't have the awareness nor the strong personality I needed to oppose my parents. I regret that my parents and the religious authority chose my major for me. […] When I'd miss the bus, I would panic, particularly when I was on my way home. I never dared tell my mother I had missed the bus, and I would stay at my friend's dorm room. […] Sleeping outside of the house was a no go, there was no room for negotiation there.

Women like Lara and Mira "bargained" with their parents so they can pursue higher education. In both narratives, the women said that their fathers encouraged them to gain higher education, but set restrictions on their mobility and forced them to come back home every night. While they attended school, they respected the local social order and never slept outside of the house. Still, their mothers were excluded from religion throughout their studies.[4] In this case, the mothers sacrificed their own status for the sake of their daughters' education. These two examples demonstrate that under certain circumstances, especially the support of the patriarch, women could go against common assertions in literature about Middle-Eastern women, which depicts mothers

as the ones reproducing their daughters' oppression (Ghanim, 2009; Hoodfar, 1995). In fact, both mother and daughter suffer from the hands of the religious and social patriarchy. By accepting the religious ban, the mother becomes a hostage of the religious leaders throughout her daughter's studies, while the daughter suffers due to the mother's sacrifice and her exclusion from her religious way of life. In these cases, the daughters consent with the demand to return to their parents' house every night instead of living closer to the university forms as a symbol of "accepting" the religious codes of conduct, and as proof that they are maintaining their dignity and family's honor, despite the many difficulties involved. Despite the prices involved, both women demonstrate that they could have challenged the religion-Hamula symbiosis, allowing them access to higher education, based on the support of their parents, who had to go against the tide in order to open new spaces for young women to mobilize and change their future.

Yet, the last quote shows that today, in retrospective, Mira expresses a new, liberated awareness, which allows her to criticize the religious laws. Through her criticism, Mira tries to undermine the power of the religious-Hamula supervision, so she and other women are able to make their own decisions concerning their education (what and where to study) without fearing the sanctions and punishments of their families by the religious establishment. This pattern of thought is becoming more apparent in Druze society, but it is still rather limited and is a result of a very long bargaining process, influenced by the intersectional location of women in the social structure.

8. Education

In addition to the religious patriarchal structure, the peripheral location of the Druze villages in the Galilee makes it difficult for Druze women to integrate into higher education (Barakat, 2015; Weiner-Levi, 2003). In 1974, the percentage of Druze girls in secondary education (grades 7 to 12) was 16.35% out of the entire population of Druze (Falah, 2000). In 1998, 23.65% of Druze women completed 12 years of education, compared to 36.58% of Christian women in Israel. Since the year 2000, the numbers have constantly risen, and in 2014, the number of Druze women high-school graduates (1,192) was higher than their men equivalents (1,055) (Ministry of Education 2014).

In higher education, the status of Arab women (Muslim, Christian and Druze) in Israel is poor relatively to Jewish women. Out of the population of Druze women, in 2011, only 10.44% completed 15 years of education compared to 12.05% of Muslim women, 18.07% of Christians and 50% of Jewish women.

The interviews suggest that the difficulties of gaining higher education emerge as early as high school. Eighteen of the uneducated participants in our study never finished high school. Shadiya, a 47-year-old unemployed divorcee, described her situation well:

> It was a known fact that I won't continue my studies beyond 9th grade. It was customary for all 9th grade girls to drop out of school, while the boys continued their studies in the nearby town.

Despite being aware of the Mandatory Education Law and their right to get high school education, up until the 1990s, the common norm was to send the boys to the regional school, while the girls were usually forced to drop out and start working to help support the family.

Noel, a 36-year-old woman, married and a mother of five, is unemployed. Unlike most women, Noel was aware of her right to education, but could not realize it. Noel told us about the "war" she waged against her father in order to continue her high school education (in the 1990s):

> We studied in the village until 8th grade. The regional high school was located outside of the village. [...] During the summer vacation, I was able to borrow some books from relatives, because my father refused to buy me any books. On the first day of school, my father forced me to stay at home. During the first week I called the school, talked to the counselor and the headmaster and asked them to come and convince my father. The counselor and the headmaster came to our house to talk to him. Unfortunately, he wouldn't budge. I sat at home for five months and refused to cooperate with my parents. [...] I wouldn't go to work. I didn't want to work in a textile factory, as he demanded. [At the end], I think I was 15 when I started working. They hired me before I reached the minimum [work] age. [...] I refused to give them my salary, as some kind of revenge [...].

Noel's narrative suggests that the headmaster and the counselor acted based on the discourse of patriarchal connectivity, and did not force her father to accept the state's law. In their eyes, a daughter's education is a private rather than a public matter, since it is a matter of the family's discretion. As the representatives of the state, the counselor and the school headmaster refrained from enforcing the law, for reasons that have to do with common rules within the community, which they belong to. According to these rules internal cultural and social issues are resolved based on local codes rather than state law. This means that in the Druze villages, local social rules are more powerful than state laws. State agencies are fully aware of these patterns of collective conduct. However, under the pretense of cultural autonomy and the non-intervention policy, the state actually supports patriarchal structures even when women's right for education is denied. This way, the symbiosis

between the patriarchal hegemony and the "liberal" state institutions preserves traditional way of life in Druze society, limits women to the private sphere, and denies their legal right to at least have 12 years of education.

Women who managed to graduate high school encountered different challenges. Many of them encountered restrictions in realizing their dreams of gaining higher education that will lead to a professional occupation. Often, their parents forced them to study in teachers' colleges, so they could become teachers in the village and work close to home. This way, women continue to fulfill their "feminine" domestic duties and adhere to the Druze religious rules.

Eight educated women testified that their parents dictated what and/or where they should study, in order to make sure that they will work within the village boundaries. Sara, 37, an unemployed mother of one, said:

> I wanted to study law [...] it was difficult to convince my parents, because they are old, very religious, and conservative. They convinced me to study in a teacher training college and become a teacher. [...] My mother was the one who refused to let me study law. [...] She said that being a teacher is the best profession for a Druze woman. In hindsight, I wouldn't have listened to them. I wouldn't have gone to a teachers' college.

Only a minority of the women succeed challenging the norm of getting education at teachers' colleges. Most of these women have a father who is not a religious person. Ranin, for example, is a 45-year-old, married woman, mother of two and employed. Although her mother is a religious woman, her father is not religious. She told us she opposed her parents' decision concerning her studies at a teachers' training college:

> When I graduated from high-school, my parents were certain I will study in Gordon teaching college together with my friends. This is a women-only college, and we have a driver who takes us there every day. I refused to apply there. I remember telling my father I'd rather not study than go to Gordon College. After high-school, I sat at home for 18 months, refusing to go to college. My father is conservative, though not strict, but my mother is religious, and she rejected the idea of university studies for religious reasons. They expected me to think of my mother and go to Gordon College like all my other friends. I opposed their decision. After 18 months of sitting around the house, I was the one who decided I was not going to do it anymore. […] I said I was going to university and that's it.

Ranin lives in a village on the Carmel mount, near Haifa University. Despite the geographic proximity, her parents insisted that she would go to the teachers' college, since it offers separate classes for Druze and Jewish women, thus preventing her exposure to Western academic contents. Additionally,

the organized transportation to the college allows the parents to supervise their daughters' mobility. But Ranin challenged her parents by insisting on going to university. She decided to act on her own, while resisting the norms of the religious-*Hamula* order. The fact that her father was not religious played an important role in this context. This case demonstrates that the supervision of sexuality, which justifies the supervision over women's mobility, affects the education choices of Druze women, which, in turn, shape their employment options and locations. Notwithstanding, the support or at least the lack of objection from the father could be of great impact on the ability of women to better maneuver against the religious–Hamula symbiosis. This does not mean that Ranin was able to completely escape this symbiosis, by the mere fact that her father "allowed" her to pursue her studies at the university. The fact that he was the one to determine her future reflects the negotiations with the patriarchal social structure, which manage to transform it, but also preserve it at the same time.

The difference between the two last narratives points out the different positions of the two women. Sara's parents are strictly religious, and thus, she knew she would have to go to college rather than a university, and she did not have a lot of leeway in her negotiation with them. Renin, on the other hand, lives closer to the university, and her father is not strictly religious. Thus, her bargaining process yielded results that were more suitable to her own will. It took her 18 months, but eventually she got what she wanted. Hence, Renin managed to relatively deconstruct the religious–family symbiosis. She went against the social and religious norms, and realized her right to choose her own path in higher education, but managed to do so, because of the support of her father. On the other hand, the father was also negotiated into this position to agree. It is hard to imagine that he would have changed his mind, if not for Ranin's insistence to fight for her right for higher education based on her own choice.

9. Druze Women in the Labor Market

Out of the general population of Arab women in Israel, aged 25 to 64 years old, 31.5% were part of the labor market in 2015, compared to a 74.2% participation rate among Arab men over 15, and 79.7% employment rates among Jewish women over 15 (Research & Information Center, 2016). The literature on the field offers a number of explanations for Arab women's underemployment: First, the patriarchal social norms stress child-raising and household chores as women's main roles, and limit their work outside of the home (King et al., 2009). Second, the state neglects its social and geographical periphery, thus creating small economic enclaves, where women are usually employed (Khattab, 2002). Additionally, Arab women typically enjoy very low human

capital, due to lack of education, work experience, and accessibility to labor-supporting services, which reduce their ability to integrate into the labor market (King et al., 2009). Finally, as mentioned, Druze women must cope with the religious obstacles unique to their community. These obstacles limit the sphere in which women – educated or not – are allowed to work in the Druze villages.

Wafaa, a 34-year-old mother of four, is educated but unemployed. She blames the *Hamula* structure of the local municipalities' elections for preventing her from remaining in the labor market:

> I was appointed to be a school teacher in the village around the time of the local elections. [...] The teacher who was responsible for the schedule supported one candidate (who ran for the mayor's office), and his rival was supported by my family and my husband's family. He saw me as an opponent. He decided to push my lessons to late afternoon hours [which she saw as unfair]. [...] Most of the teachers ignored me in the break room. [...] I decided that this was enough and left this system.

Wafaa's description demonstrates that women's integration into the local labor market depends on their affiliation or support of the ruling *Hamula*. This is a typical story in the Druze school system, where patriarchal connectivity mediates and intervenes in social and political practices. These practices result in a tougher competition for women over the limited number of opportunities, which are not distributed based on objective criteria.

Niruz, 32, mother of two, educated and unemployed, told us that she had graduated eight years ago but still could not get a job, because her family is not part of a strong *Hamula*:

> Three other girls studied the same subjects as me. They were accepted into the education system and work as teachers in the village's school, while I've been waiting for eight years, applying for a job, and rejected by the supervisors. You know, they were accepted because they are relatives of the Head of the Education Department or the Head of the Municipality, and some of them are relatives of the school headmaster. But I am not. […] We have no relatives in the Ministry of Education. […] I already gave up.

Education personnel is supposed to be appointed according to professional criteria; but those in power positions – Druze state officials – act according to the social *Hamula* norms, and appoint teachers based on affiliation. Druze women with no connections to the power centers in the local sphere are discriminated, and are forced to give up working all together, or compromise on a job for which they are overqualified. Niruz added that she cannot apply for a position in the neighboring village's school because of the limitations on her mobility. Niruz's position, as a Druze woman from a small, powerless

Hamula, whose mobility is limited to the geographical boundaries of her own village, prevents her from integrating in the low-opportunity job market. Niruz's case demonstrates the intersectionality of women's oppression, according to which the position in the social structure, not only as a woman, but also as being a member of a small family has major repercussions on her future and opportunities to integrate in the job market.

Within this complex dynamic, Druze women with no prestigious patriarchal connectivity use different strategies to enter the local labor market. One of these strategies is a "(political) bargain with patriarchy" (Kandiyoti, 1988). In its classic form, this strategy describes a situation in which the woman negotiates (overtly or covertly) with representatives of the patriarchy, thus allowing her a certain space for agency, in exchange for maintaining the modesty codes, for example. This pattern of negotiations is not always pleasant, as we have noticed in the case of Ranin, mentioned above. Another case that helps us illustrate this pattern of bargain with patriarchy is that of Salam, who is a 32-year-old unemployed woman. Salam described to us how she had managed to get teaching hours at school through a political bargain:

> During the election campaign, I went to the candidate for the mayor's office, who was already acting mayor at the time, and told him: 'You need votes to win the election, and I want to work as a teacher. If you help me by giving me a teacher's position at the school, I will vote for you. If you don't, I won't vote for you, and the rest of my nuclear family will do the same.' And indeed, I've worked in the local high school for a year. They gave me training and extra hours, beyond of the regular lesson plan. These were hours allocated by the local education department.

Salam's narrative presents her as powerful. Through bargaining, she asserted her voice and her vote as important, and politically and economically valuable. However, since the reward she offered was essentially personal and individual, her negotiations played into the hands of the dominant patriarchal culture.

In this culture, it is more difficult for Druze women to enter the labor market and develop as professionals, especially when faced with men bosses. Ranin, a 45-year-old liberal social worker, mentioned earlier, described her challenges in dealings with the head of the welfare department, who tried to force her to comply with his *Haumla* agenda:

> When I worked in the village's welfare department, there were some misunderstandings between me and the head of the department. My relative, who had a job in the local municipality, intervened [for my sake] without asking me first. He tried to protect me and defend me against the manager. [...] I was offended, as an educated woman, that a man from my family intervened without me asking for his help. [...] I wanted to solve things on a professional, prac-

> tical level, and not resort to personal and *Hamula* issues. I felt I was weak and required help. [...] You can't understand their point of view when you are coming from a professional position, and they are looking at it from a political, local, *Haumla* perspective. It's unbearable. [...] You feel like you and your professionalism are worthless when faced with the authoritative boss. [...] I chose to resign.

Ranin highlights the importance of the *Hamula*'s loyalty to the head of the local municipality. Ranin, as an educated woman, who married to an educated man who can provide income for her family, had the privilege to resign. Later she said:

> I resigned knowing that we will have to make do with my part time job in the National Security Institution until I can find another job. […] I left the Welfare department thinking that my resignation is not the end of the world. I knew there was something outside of the village, which is even better and more beautiful. Life is not limited to this village.

The two narratives, Salam's and Ranin's, highlight the different positions of Druze women, and their different coping mechanisms. While both are academically educated, Salam is single, daughter of an uninfluential family. She lives in the Upper Galilee, and believes that her mobility as an independent woman is limited to the rural sphere. This position affects her bargaining position versus employers in the rural, Druze education system. Ranin, on the other hand, is a married woman. She lives in the Carmel region, close to the city of Haifa. Her sphere of mobility is not limited to the rural region, and instead of bargaining with the head of the municipality and the head of the welfare department, she chose to challenge them. We might say that Ranin's position allows her to adopt a liberal-progressive perspective, which challenges the symbiosis between patriarchal connectivity and the conservavative rules of Druze society. This way, she positions herself as an autonomous subject, who is entitled to make her own decision about her job and work conditions.[5]

That said, the fact that Ranin had to resign means that the predominant social structure remains in place and manages to order the local job market according to its own rules. The power of the family in the social structure has major repercussions on the chances of its members to gain access to the job market. Although this is true for men as well, it is most apparent in the case of women. This patriarchal social structure, which is based on the strict symbiosis between religious rules and Hamula has an impact on women, who cannot get access to the local job market, as a result of the weak status of their families and have no chance to be able to work outside of their village, as a result of the restrictions imposed by the religious establishment. The

combination of the two factors makes the life of women much more limited. That said, the ability of Ranin to resign and seek a job outside the village demonstrates that married educated women have much stronger negotiating spaces and could escape the patriarchal social structure by seeking jobs outside their villages. Here, the geographic location of the village is an important factor. The closer it is to a big city, the higher the chances that women, like Ranin could drive away in order to find a job and integrate in the job-market outside their villages. This case is not common to most Druze women though, since most Druze villages are located on the top hills of the Galilee, far away from the closest metropole of Haifa.

Luziana, a 36-year-old pre-school teacher, described her struggle against the head of the education department and the head of the local municipality when she sought to assert the rights of her kindergarten children. In this case, both managers belonged to the same *Hamula* as her:

> During my first year as a pre-school teacher, I led a strike. I gathered all the parents and declared a strike in the kindergarten. The head of the local education department summoned me to his office, reprimanded me, and told me: 'Legally, you have no right to strike. Only the parents can take such a step.' [...] Well, I've learned my lesson, and now, almost every year, I encourage the parents to strike. [...] My husband is a cousin of the head of the local municipality, so they expect me to support the head of the municipality, even when the children are the ones who get hurt. I can't do that.

Out of the already smaller education budgets allocated to Arab municipalities, a relatively high percentage is directed to deal with other needs by the local municipality, thus further undermining children's right for a proper education. Luziana's subversive actions against the local municipality express the principle of "rights," rather than the principle of *Hamula* loyalty. She highlights the gap between her position, according to which kindergarten children are entitled to their designated budgets and the local municipality is obligated to transfer them, and the fact that she is expected to prefer the political *Hamula* interest over the common good. A strike against the local municipality in a Druze village is not common, as it is perceived as a personal act against the head of the municipality. Indeed, Luziana's attempt to distinguish between her private-familial connections and her professional-public identity was not successful. Yet, her act was a subversive act against the spreading of the patriarchal connective norms into the public sphere and reflected a progressive perception that is based on social justice.

The narratives of the women reveal that education alone does not provide women with the status and power of presenting themselves as autonomous subjects; this ability is also dependent on their *Hamula*'s status within the

rural social structure, the village's geographical location, and the father's level of religiosity. All those factors intersect and affect the level of women's agency, and their status as subjects.

Thus, conservative, religious Druze women with elementary or high school education, as well as academically educated women, act individually as agents to realize their rights as human beings. Their act is a complex one, as each of them has to deal from her own position with the tribal, rural Druze social structure, which still exerts power based on Hamula loyalties, compromising women's rights for full equality and access to education and the job-market.

10. Discussion

The narratives of Druze women reflect the multi-dimensional oppression they face on a daily basis: the symbiosis between the tribal and religious regimes limits their mobility, supervises their sexuality, and reduces their choices of education and occupation. This strict supervision reflects the colonization of the public sphere by the rigid patriarchal tribal social structure. The Arab-rural "public" sphere functions de jure as a private-collective patriarchal sphere, which is non-democratic, but is protected by the policies of the state.

Several of the women interviewed have demonstrated the intersectionality of oppression associated with gender, and the centrality of the symbiosis between religious rules and *Hamula*, as the main factors determining the spaces of maneuvering of women. This patriarchal social structure has intersectional ramifications, manifested in the dependency of women on their male relatives when it comes to mobility, education and employment.

The data provided above demonstrates also that the tribal social structure makes it hard for women to resist oppression and supervision. Indeed, most of the interviewed women admitted that it was difficult for them to resist the symbiosis between religion and *Hamula* structure. However, whereas some of them tried to resist, and have not prevailed, others did manage to either reveal the contradictions of the patriarchal social structure or embarrass the men in charge of the discriminating system of power.

Notwithstanding, women expressing resistance have demonstrated that their ability to do so is fully dependent on their position and status in the same patriarchal social structure. The three major factors, namely level of education, marital status and parents' religiosity, played a major role in the social dynamics and have determined the ability of women to resist. Although women's resistance was usually characterized as "bargaining with patriarchy," and thus produced only personal gains, their intersectional location in the social structure could be not only a limitation, but also a source of power that could lead to a future impact on the transformation of the overall patriarchal structure. This pattern of intersectional gendered resistance could allow

women to promote a change, as small and modest as it may be, in gender relations, without being excluded and banned from their community. The incremental contribution of women's practices to social change, may not lead to a strong collective transformation, since the rural social dynamics recreates alternative repressive social forms that block or at least slow down change, they nevertheless open avenues of hope for future generations. The slight opportunities of change are manifested in the discourse of many interviewed women, especially the educated that clearly argue that if they were to make their way to higher education today, they would have not obeyed their parents and followed the predominant patriarchal norms in society. Although admitting that at this stage is only a hypothetical assertion, it still has real impact, for some of these women are proactive in their immediate environment and have some influence by propagating the discourse of gender inequality and pointing its sources. Making other women aware of the challenged symbiosis could have a very strong ramification on other women's consciousness. This is true when speak of educated women in strong and leading positions in the job-market and form as a result a successful model to be followed. This is also true for part of the interviewed women who are mothers of young daughters that will face the same junctures and will have to make a decision regarding their ability to make their own decisions about their future.

This means that the rarity of resistance practices does not reflect a full acceptance of the existing patriarchal regime. In some of the narratives, the women expressed sadness and rage over not being able to realize their educational and occupational preferences independently, and implied that they would like to be treated as individuals with personal capital, away from the religious and *Hamula* rules that shape the private sphere. Some of the women promoted a discourse of civil rights, gender equality, and freedom of choice, in order to share the community's resources as equal partners. They sought deconstructing the intersectionality of gender inequality in ways that enabled them to keep the balance between their personal aspirations and loyalty to the close family. This was revealed to be true, especially when the narrow family ties clashed with the broader *Hamula* affiliation.

Druze women's narratives did not speak the language of Western feminists, when it comes to the demand to separate the private from the public sphere. We may assume that they do not demand such separation because they deem it unrealistic for their society, rather than because they agree with Western feminists concerning the masculine bias of the Western public sphere. In addition, most interviewed women did not refer to the state's role in transforming power relations in the Druze community. Nor did they express the hope that the change would be led by the religious patriarchy. Rather, the women who managed to resist and fought to weaken the power of religion

and family over their own choices expressed hope that their personal struggle can form a model to be followed by others in the future.

Theoretically, the findings imply that Druze women, as representing women in conservative societies, must fight first for equality and freedom within the private sphere, to prevent patriarchal values from taking control of the entire public sphere. At the same time, they have to fight against the institutionalization of the religious–*Hamula* power in the entire social structure, including in public institutions, such as municipal services and the educational system, as well as in the private sector.

In light of this perspective, Druze women argue that the creation of a "public" sphere that allows equal opportunities for both women and men requires, as a first step, a change of the power relations in the private sphere. Accordingly, a change in the perception of gender, social, and religious issues should be promoted through a horizontal (rather than vertical) dialogue between family members and friends in the private sphere. This conclusion reiterates Sharabi's (1990/1991) argument, that the structure of Arab society could only be changed through a process of self-awareness; an awareness that is based on a multi-disciplinary thought, disconnected from the patriarchal, religious thought. This position reiterates Sadik Jalal Al-Azem's argument against the tabooing mentality (epistemology of *tahrim* – religious prohibition) (Al-Azem, 1997). This mentality, which utilizes the religion in order to impose a very strict surveillance regime, especially on women behavior, is supported by the patriarchal *Hamula* structure. It seems that women are aware of this symbiosis and make clear that any transformation of the current reality has to start with deconstructing this symbiosis.

The data presented above points out the critical importance of the private sphere as the foundation for a structural social change in Druze society. It seems that the change of awareness will have to start from the private family sphere, in order to give room and power to the weak and disempowered, so they can take responsibility and engage in a personal-political dialogue; take responsibility for changing their own position instead of staying passive in face of the structure of connective patriarchy of the "public" sphere. Apparently, when the state does not protect women in minority communities and instead preserves the patriarchal/religious power relations in these communities, the only way to change gender relations is from the bottom up – when women, through their everyday resistance practices, try to change the rules of the private sphere, and this change spread to the entire public sphere and its norms. Despite the fact that this change is slow and costs women a lot of effort and sacrifice, given the external winds of change and the technological and cultural globalization processes taking place, their efforts are having gradual but strong transformative impact.

NOTES

1. We use the terms Arabs and Palestinians, and Druze without distinction, since some Druze women define themselves as Israeli Druze, other would say they are Israeli Arabs or Druze Arabs, and some identity as Palestinians.

2. Strict religious women cover their hair and body; they visit the *Hilwe* at least once a week for a joint reading and prayer. Non-strict religious women visit the Hilwe once every three months, and normally they won't read in the scriptures when they are there.

3. One example for an inappropriate behavior is the participation of religious Druze in a wedding that includes music, even if the religious person is not present during the musical part.

4. This rule is used in a specific village. Currently, mothers of women students are still banned, but only for five months and not for the entire period of their schooling, as was the common practice 10 years ago.

5. It should be stressed here that Ranin's work in the Jewish city was not free of national and gender bias. Later in her narrative, she told us her racist employer promoted another colleague based on a national bias. Since the current paper explores challenges faced by Druze women within their own society, challenges related to their interaction with the Jewish majority were omitted.

REFERENCES

Abu-Jawhar, Muhammad Amin (2008). *Druze between Religion and Customs.* Beirut: Altquayn. (Arabic)

Abu-Zaki, Fuad (1997). *Al-Amir Al-Sayyid – Jamal al-Din 'Abdallah al-Tankhi Biography – His Writings*. PhD diss., University of Beirut, Beirut. (Arabic)

Abu-Rabia-Queder, Sarab (2017). "The Paradox of Professional Marginality among Arab-Bedouin Women," *Sociology* 51(5): 1084–1100.

Al-Azem, Sadik Jalal (1997). *Beyond the Tabooing Mentality*. Damascus: Al-Mada.

Barakat, Ebtesam (2015). *Strategies and Practices of Resistance of Druze Women against Multiple Power Relations*. PhD diss., Bar Ilan University, Ramat-Gan. (Hebrew)

Benhabib, Seyla (1998). "Models of Public Space: Hannah Arendt, the Liberal Tradition, and Jürgen Habermas," in Joan B. Landes (ed.), *Feminism, the Public and the Private*. Oxford: Oxford University Press, 89–120.

Castells, Manuel (2008). "The New Public Sphere: Global Civil Society, Communication Networks and Global Governance," *The Annals of the American Academy of Political and Social Science* 616(1): 78–93.

Central Bureau of Statistics (2017). *The Druze Population in Israel – A Collection of Data in Honor of Nabi Shu'ayb Holiday*. http://www.cbs.gov.il/reader/newhodaot/hodaa_template.html?hodaa=201711106

Cole, Juan R. I. (2003). "The Taliban, Women, and the Hegelian Private Sphere," *Social Research* 70(3): 771–808.

Crenshaw, Kimberlé (1991). "Mapping the Margins: Intersectionality, Identity Politics, and Violence against Women of Color," *Stanford Law Review* 43(6): 1241–1299.

Eickelman Dale, F., and Salvatore Armando (2004). "Muslim Publics," in Armando Salvatore and Dale F. Eickelman (eds.), *Public Islam and the Common Good*. Leiden: Brill, 3–27.

Elshtain, Jean Bathke (1993). *Public Man, Private Women***.** Princeton, NJ: Princeton University Press.

Falah, Salman (2000). *The Druze in the Middle East.* Jerusalem: Ministry of Defense.

Firro, Kais (1999). *Druze in the Jewish State*. Leiden: Brill.

Fraser, Nancy (2007). "Transnationalizing the Public Sphere: On Legitimacy and Efficacy of Public Opinion in a Post-Westphalian World," *Theory, Culture and Society* 24(2): 7–30.

Fraser, Nancy (1990). "A Contribution to the Critique of Actually Existing Democracy," *Social Text* 25/26: 56–80.

Ghanim, David (2009). *Gender and Violence in the Middle East*. London: Praeger.

Habermas, Jürgen (1973/1975). *Legitimation Crisis.* T. McCarthy (tr.). Boston, MA: Beacon Press.

Hassan, Manar (1999). "Politics of Honor: Patriarchy, the State and Women's Murder for Reasons of Family Honor," in Dafna Yizra'eli, Henriette Dahan Kalev, Hannah Herzog, Manar Hassan, Hannah Naveh, and Sylvie Fogiel Bijaoui (eds.), *Sex, Gender and Politics*. Tel-Aviv: HaKibutz HaMeuhad, 267–305. (Hebrew)

Hassan, Yosef (2011). *Druze between Geography and Society*. Haifa: University of Haifa.

Hoodfar, Homa (1995). "Child Care and Child Health in Low-income Neighborhoods of Cairo," in Elizabeth Warnock Fernea (ed.), *Children in the Muslim Middle East*. Austin, TX: University of Texas Press, 146–167.

Jamal, Amal (2011). *The Politics of Minority Nationalism in Israel: Politics of Indigeneity*. London: Routledge.

Joseph, Suad (1993). "Connectivity and Patriarchy among Urban Work Class Arab Families in Lebanon," *Ethos* 21(4): 465–484.

Joseph, Suad (2000). "Gendering Citizenship in the Middle East," in Suad Joseph (ed.), *Gender and Citizenship in the Middle East*. Syracuse: Syracuse University Press, 3–30.

Kandiyoti, Deniz (1988). "Bargaining with Patriarchy," *Gender and Society* 2(3): 274 –290.

Khattab, Nabil (2002). "Ethnicity and Female Labor Market Participation: A New Look at Palestinian Enclave in Israel," *Work, Employment and Society* 16(1): 91–110.

King Yehudit, Neon Deniz, Wolde-Tzadik Avraham, and Habib Jack (2009). *Employment of Arab Women Aged 18–64.* Jerusalem: Myers-JDC-Brookdale (Hebrew).

Lister, Ruth (2007). "Inclusive Citizenship: Realizing the Potential," *Citizenship Studies* 11(1): 49–61.

Lustick, Ian (1985). *Arabs in the Jewish State*. Haifa: Mifras. (Hebrew)

Massumi, Brian (2002). *Parables for Virtual: Movement, Affect, Sensation.* Durham: Duke University Press.

Moghadam, Valentine (2004). “Patriarchy in Transition: Women and the Changing Family in the Middle East,” *Journal of Comparative Family Studies* 32(2): 137–162.

Research & Information Center (2016). *Arab Women Employment*. Jerusalem: Knesset (Hebrew).

Shalhoub-Kevorkian, Nadera, and Suhad Daher-Nashif (2013). “Femicide and Colonization: Between the Politics of Exclusion and the Culture of Control,” *Violence Against Women* 19(3): 295–315.

Sharabi, Hisham (1990/1999). *Cultural Criticism of Arab Society at the End of the Century*. Beirut: Centre for Arab Unity Studies. (Arabic)

Stopler, Gila (2005). “The Limit of Equality – Reflections Following Ruth Halperin Kaddari’s Women in Israel: A State of Their Own,” *Mishpat VeMimshal* 8: 391–428. (Hebrew)

Strauss, Anselm, and Juliet Corbin (1990). *Basics of Qualitative Research: Grounded Theory Procedures and Techniques*. Newbury Park, CA: Sage.

Telecommunication and Information Systems (2014). *Distribution of School Students in the Druze Sector by Year, Stage, and Gender, 2000–2014*. Jerusalem: Ministry of Education. (Hebrew)

Walby, Sylvia (1990). *Theorizing Patriarchy*. Oxford: Basil Blackwell.

Weiner-Levy, Naomi (2003). *“I’m Like a Bird but Cannot Fly” Narrative Analysis of Druze Women Entering Higher Education*. PhD diss., The Hebrew University in Jerusalem, Jerusalem. (Hebrew)

Yiftachel, Oren (1997). “Nation-building and the Division of Space in the Israeli ‘Ethnocracy’: Settlement, Land and Ethnic Disparities,” *Law Review* 21(3): 637–663. (Hebrew)

Addleton Academic Publishers

Journal of Research in Gender Studies 8(2), 2018
pp. 89–105, ISSN 2164-0262, eISSN 2378-3524 doi:10.22381/JRGS8220185

TESTING FOR DIFFERENCES BETWEEN SPANISH MEN AND WOMEN ON GENDER SELF-DEFINITION ASSESSMENT

RUBÉN GARCÍA-SÁNCHEZ
rubengs86@gmail.com
Autonomous University of Madrid
(corresponding author)
CARMEN ALMENDROS
Autonomous University of Madrid
BEGOÑA ARAMAYONA
Autonomous University of Madrid
MARÍA JESÚS MARTÍN
Autonomous University of Madrid
JORGE S. LÓPEZ
Public University of Navarre
JOSÉ MANUEL MARTÍNEZ
Autonomous University of Madrid

ABSTRACT. This study applied a mean and covariance structure analysis (MACS) to the data from a Spanish university sample to examine the invariance of the factor structure of the Hoffman Gender Scale (HGS) across gender. The findings indicated that the hypothesized second-order model structure of the HGS was a reasonable representation of the data for males and females. Invariance testing was performed for men and women and revealed non-invariance for the items and subscales of the HGS. Women had significantly higher means on the two latent factors compared with men. The internal consistency estimates were satisfactory for all groups.

Keywords: gender identity; well-being; psychometric properties; factorial invariance; Spanish men and women

How to cite: García-Sánchez, Rubén, Carmen Almendros, Begoña Aramayona, María Jesús Martín, Jorge S. López, and José Manuel Martínez (2018). "Testing for Differences between Spanish Men and Women on Gender Self-definition Assessment," *Journal of Research in Gender Studies* 8(2): 89–105.

Received 12 September 2017 • Received in revised form 3 May 2018
Accepted 4 May 2018 • Available online 28 May 2018

1. Introduction

"The law of nature is constituted by the difference between words and things" (Foucault, 1968: 106). In gender research in psychology, the evolution in the names of the study concepts has been critical for the development of instruments and the theoretical framework supporting them (Smiler and Epstein, 2010). Definitions of the concepts change from one to another scale (i.e. "masculinity," "femininity," or "gender identity"). The study of gender should be performed from a critical point of view, being aware that gender is a social construction linked to a specific culture and in a given moment in time. Therefore, the critical review of classic studies and writing the results of our research should be sensitive to this matter. Even today, we have a lot to investigate about the sex-gender system, and in particular, about the stereotypes, roles, and identities of gender.

1.1 Brief history of masculinity and femininity measurement: Key concepts

Until the 70s, it was accepted that masculinity and femininity consist of a list of features and interests based on statistical differences according to sex (Butcher et al., 1989; Gough, 1952; Guilford and Zimmerman, 1949; Hathaway and McKinley, 1943; Strong, 1936; Terman and Miles, 1936). With the advent of the questionnaires by Bem (BSRI; 1974) and Spence, Helmreich, and Stapp (PAQ; 1975) and the appearance of the androgyny model, a change of conception eradicated the view of a single dimension with two poles. Androgyny makes reference to the fact that persons can develop behaviors or have traits that are more characteristic of masculinity or femininity, regardless of their biological sex (Bem, 1972).

Nevertheless, the BSRI and PAQ have continued to be used pervasively, and many times, as a measure of the characteristics of masculinity and femininity, despite the changes in the definition of the construct considered by the authors. Masculinity and femininity were understood as the meaning and consequences of what it involves to be a man and a woman, respectively, in the culture to which they belong (García-Mina, 2004). On the other hand, the concept of gender identity was used to refer to a subjective feeling of masculinity or femininity (Spence and Swain, 1985), and was defined as a basic, existential conviction that they are a man or a woman. However, other authors linked it to a feeling of confidence and comfort with being a man or a woman (Lewin, 1984) or concluded that gender identity reflects an individual self-concept as a man or a woman (Golombok and Fivush, 1994). Spence (1985) was the first to suggest that masculinity and femininity should be understood as the gender identity instead of considering them a group of traits, characteristics, behaviors typically linked to men or women (that is, what we understand as gender stereotype and/or gender role). Following his

approach, gender identity is based on the characteristics or qualities included by anyone in their personal definition of the meaning of a man or a woman and not so much on the assessment made of gender stereotype, that will include characteristics associated with each gender, but not assumed by ourselves.

Given the confusion in the literature about the theoretical approach to the gender identity concept, some authors have advocated the creation of new terms, such as gender role identity, which refer to the degree of agreement of a person with the social construction of masculinity and femininity (Basow, 1992; Mintz and O'Neil, 1990). In this regard, they assured that it would be the object of analysis of instruments such as the BSRI (Bem, 1974) and the PAQ (Spence et al., 1975), as these questionnaires consider a number of traits and behaviors that are "typical" of men and women, that is, they are a reflection of the social construct of what is expected from a man and a woman.

A new concept, gender self-concept, was born in this context to answer questions such as the meaning, for a given person, of being a man/woman, whether this is defined based on the gender role assigned or in other ways, how the person defines his/her masculinity/femininity, and if it is important for him/her. Therefore, the gender identity of the individual would be part of the gender self-concept of this person. As part of the new argument line (Basow, 1992), another concept emerged in relation to self-confidence: gender self-confidence (Hoffman et al., 2000). It is defined as the intensity of the belief that they meet personal standards of femininity/masculinity. Therefore, gender self-confidence is an aspect of gender identity, and this is an aspect of gender self-concept.

1.2 Hoffman Gender Scale: Gender self-definition, self-acceptance and self-confidence

Gender self-concept is the self-perception as a man or a woman. It is a broader concept than gender identity, according to which we have a self-perception as a man or a woman, without being convinced or feeling sure of our own masculinity or femininity. The gender self-concept reflects what is personally important for us about being a man or a woman. It can include or not include a strong gender identity, in the same way that gender identity can include or not include high gender self-confidence. In this line, the work of the group research led by Rose Marie Hoffman was developed, resulting in the construction of a scale: the Hoffman Gender Scale (HGS; Hoffman, 1996; Hoffman et al., 2000). The purpose of this instrument was to measure gender self-confidence by two aspects that define it (see Figure 1): gender self-definition ("how strong a component of our identity we consider our femininity or masculinity to be") and gender self-acceptance ("how comfortable an individual is as a member of his or her gender") (Hoffman et al.,

2000: 494–495). Therefore, a new approach was adopted for the measurement of masculinity and femininity.

The development of the original scale was reported in two studies (Hoffman et al., 2000). The first was a preliminary examination of a pilot version of the instrument, in which the test was administered to 146 (54 men) undergraduate students. The second was a review of the scale items and was a study of 371 (98 men) undergraduate students' responses using exploratory factor analysis to study the scale structure.

The Hoffman Gender Scale was a clear conceptual advance in the development of new measures and theoretical approaches with innovative concepts that would complement the less studied aspects related to gender. This study was aimed at analyzing the psychometric properties of a Spanish version of the HGS in samples of men and women comparable to those used in the original study (Hoffman et al., 2000). The primary focus of this study was to investigate the factor structure of the Spanish version of the HGS through confirmatory factor analysis strategies and to provide information on the internal consistency of the instrument for male and female samples. We conducted a mean and covariance structure analysis (MACS) of the HGS in order to examine whether the theoretical constructs are equivalent across sex. Finally, we investigated the relationship between the HGS scores and other relevant variables.

2. Method

2.1 Participants and Procedures

The participants included 398 undergraduate students (261 women, 137 men), with ages ranging from 20 to 53 years (M = 22.09; SD = 3.96) for women, and from 20 to 64 years (M = 23.11; SD = 3.98) for men. All of the students selected for this study were originally from Spain and who reported being heterosexual.

Following approval by the Ethics Committee of the Autonomous University of Madrid, the data for this study were solicited from third-year undergraduate students enrolled in Abnormal Psychology at a large public university. Within three different academic years (2012–2014), the students could choose participation in this study among other equally attractive activities in partial fulfillment of a course requirement. Those who agreed to participate in the study completed the instruments in group sessions in the students' classrooms. The anonymity of all participants was assured, as well as the confidentiality of their e-mail addresses, if the students chose to receive a full report of their results.

2.2 Measures

Hoffman Gender Scale (HGS; Hoffman, 1996; Hoffman et al., 2000). Its purpose is to measure two constructs that are part of gender self-confidence: Gender Self-Definition (GSD) and Gender Self-Acceptance (GSA). It comprises 14 statements that are evaluated in a Likert scale from 1 to 6, where 1 is "completely disagree" and 6 is "completely agree." There are two parallel versions of the instrument, one written for women on femininity and the other for men asking about their masculinity.

Bem Sex Role Inventory-12 (BSRI; Bem, 1974; Spanish 12-item version by Mateo and Fernández, 1991). It was designed to assess the self-perceived possession of expressive and instrumental attributes that are considered socially desirable for women and men, respectively. The response format is based on a Likert scale from 1 (never or almost never) to 7 (always or almost always). The short version used for this study comprises 12 attributes, six of which represent the dimension of "masculinity" (i.e., "a natural leader") and the other six of "femininity" (i.e., "affective"). The Cronbach's alpha for the masculinity scale scores was .89 in the sample of men and .84 in the sample of women in this study. For the femininity scale, it adopted values of .95 for the men's scores and .94 for the women's scores.

Brief Symptoms Inventory (BSI; Derogatis, 1993; Spanish version by Pereda, Forns, & Pero, 2007). This test comprises 53 items measured in a 5-point Likert scale (0–4). Indicators of nine symptomatic dimensions and a Global Severity Index (GSI) are obtained. This study used the GSI as a general measure of psychological distress. The Cronbach's alpha was .96 for the men's scores and .95 for the women's scores in this study.

WHO-Five Well-being Index (WHO-5; World Health Organization, 1998). This instrument was developed to measure general psychological and subjective well-being. The scale comprises five items with a response format of six points from 0 (*never*) to 5 (*all the time*). The Cronbach's alpha was .84 for the men's scores and .80 for the women's scores in this study.

2.3 Back-translation of the HGS Spanish version

A back-translation design was used following the international methodological standards recommended by the International Test Commission (ITC) to adequately adapt instruments from one culture to a new one (Hambleton, 1994, 1996; Muñiz, Elosua, and Hambleton, 2013). Therefore, the first step was to design the research methods and evaluate the relevance of the construct for the target population and the possible influence of the cultural and linguistic differences in the context of the study. The second was to ask the original authors of the instrument for their consent, and finally, to inform the Ethics Committee of the UAM. Advice was provided by a team of five expert

investigators. Then, two qualified translators, the first of Spanish origin and the second of English origin, were individually trained on the constructs evaluated and the construction of the tests. The HGS was translated and back-translated, and the expert team evaluated the equivalence between the two versions, making the appropriate changes in the Spanish version.

2.4 Data Analyses

The program package EQS 6.1 (Multivariate Software, Inc.; Bentler, 1995) and SPSS version 19.0 (IBM Corp., 2010) were used for the data analyses. The scores for each item were compared between the samples of men and women using the Student's *t* test. An analysis of the effect power was also performed using the Cohen's *d* statistics (1988) as standardized means of the effect size to estimate the magnitude and relevance of the results obtained (Wilkinson and APA-Task Force on Statistical Inference, 1999). As proposed, a value of .2 would correspond to a small effect size, .5 moderate and .8 high (Cohen, 1988).

CFAs were conducted on the HGS items' scores for the male and female samples. Three different models were tested: (1) the two-factor model (Hoffman, 1996; Hoffman et al., 2000), (2) a one-factor model that included all items of the HGS, and (3) a second-order factor model that included the original two factors, following the expanded theoretical model of Gender Self-Confidence of Hoffman et al. (2000). The model fit was evaluated considering several fit indices: the comparative fit index (CFI; Bentler, 1990), the non-normed fit index (NNFI; Bentler and Bonett, 1980), the root mean square error of approximation (RMSEA; Steiger, 1990), and the standardized root mean square residual (SRMR; Jöreskog and Sörbom, 1996). Indicators of a good model fit are evidenced by CFI and NNFI values greater than .90, RMSEA less than .06, and SMRS less than .08 (Byrne, 1994; Cheung and Rensvold, 2002).

We conducted multigroup CFA models to examine whether or not the components of the measurement model and the underlying theoretical structure were invariant across the male and female samples (Byrne, Shavelson, and Muthén, 1989). We used the robust maximum likelihood estimation in EQS 6.1. to assess for measurement invariance across the samples. Testing for equivalence based on the analysis of mean and covariance structures (MACS) entails a hierarchical set of steps (Byrne, 2008): (0) The determination of a good multigroup baseline model fit, (1) Model 1: a configural model is the first and least restrictive model to be tested; only the extent to which the same configuration of fixed and freely estimated parameters holds across groups is imposed with no equality constraints, (2) Model 2: first-order factor loadings invariant, (3) Model 3: first- and second-order factor loadings invariant, (4) Model 4: first- and second-order factor loadings and

first-order intercepts invariant, and finally (5) Model 5: first- and second-order factor loadings and first- and second-order intercepts invariant. We used two approaches to compare invariance models: (1) The corrected scale S-B χ^2 difference test developed by Satorra and Bentler (2001) was used to compare nested models. If this difference value is statistically significant, it would be indicative that the constraints specified in the more restrictive model do not hold; (2) The changes in CFI were used as a less vulnerable criterion for variations in sample size and non-normality than S-B χ^2 changes (Cheung, 2008; Cheung and Rensvold, 2002). This difference in value should not exceed .01. At last, testing for latent mean differences requires two conditions (Byrne and Stewart, 2006). First, in a higher order model, equality constraints are placed on both the first- and second-order factor. Second, the latent factor means for one group must be fixed to zero (Bentler, 2005). In this study, the male group was chosen as the reference group against which the latent mean for the female group was compared. The statistical significance associated with the differences between the latent means for the male group and those freely estimated for the female group was determined on the basis of the *z* statistic (Byrne and Stewart, 2006).

In addition, both the male and the female samples were split into two groups, masculine or feminine, based on their scores on the BSRI. For such, the mean of each sample, regarding their endorsement of the masculinity or femininity attributes, was used as a cut-off point for their classification into either the "masculine" or the "feminine" subgroups (men: masculinity = 4.45, femininity = 5.17; women: masculinity = 4.21, femininity = 5.57). To obtain evidence of the criterion validity, *t*-tests and Cohen's *d* were used to compare among the "masculine" and "feminine" subgroups in their scores on the HGS, for both women and men. Pearson correlations between the subscales of the HGS and other relevant measures were also examined.

3. Results

3.1 Reliability: Internal Consistency

The Cronbach's alpha coefficients attained appropriate values for the subscale scores: males GSD (α = .89), GSA (α = .86); Females GSD (α = .88), GSA (α = .87).

3.2 Item Analysis

The means, standard deviations, and item-total correlations are shown in Table 1. The mean scores ranged from 3.00 (Item 1) to 5.46 (Item 11) for the group of men and 3.55 (Item 1) to 5.54 (Item 11) for the women. The item-total correlations of the corresponding subscales were above 0.40 in all cases.

Significant differences were found between men and women in the mean scores of the GSD factor and all of its items, with a moderate effect size. However, in the comparison of the means of the items and the global of factor GSA, no significant differences were found, except in the case of items 2, 8, and 13, all of which had a small effect size. In all of the comparisons, the women had higher scores, except for items 2 ("I am confident in my masculinity/femininity") and 3 ("I meet my personal standards for masculinity/femininity"), both belonging to the GSA factor, for which men had higher scores.

3.3 Factorial Analysis

The fit indices for the competing models of the HGS in both samples are shown in Table 2. The two-factor model and the second-order factor model reached appropriate levels of fit in both samples. However, the second-order model yielded higher values of CFI and NNFI, and a lower RMSEA and S-B χ^2 value than the two-factor model. Factor loadings of the HGS items on the second-order model are shown in Table 3. The results of the Lagrange Multiplier (LM) test suggested a very interesting change in both models: Item 4 ("My perception of myself is positively associated with my biological sex"), which originally belonged to the GSD, was highly related to the other factor GSA (males p=.68; females p=.65) in the two-factor model, while in the second-order model, it was related to the second-order factor (males p=.16; females p=.43).

3.4 Measurement Invariance

Five multigroup models were tested across sex, each representing an increasingly more restricted parameterization than its predecessor (see Table 3). The configural model (Model 1) in which no constraints are imposed, represented an excellent fit to the data. Models 2 and 3, in which all first- and second-order loadings are constrained as equal, also represented an acceptable fit to the model. At this level of constraint, the measurement equivalence was adequate, the ΔS-B χ^2 was not significant, and the ΔCFI was < 0.01, reflecting model invariance as compared to the configural model (Cheung, 2008; Cheung and Rensvold, 2002). The results of the LM test suggested only that the constraint of the factor loading of item 4 was noninvariant across the groups (p=.03).

At the stricter level of constraint, in the measurement equivalence of intercepts, Models 4 and 5, the ΔS-B χ2 was significant, indicating noninvariance at this point. In these two models of equivalence, the LM test also suggested the change of Item 4, moving it to the second-order factor (Model 4 p=.349; Model 5 p=.35).

3.5 Latent Mean Differences

These tests revealed statistically significant mean differences between men and women on GSD and second-order factors, but not on GSA. Given that the estimated difference values shown in Table 4 are reported for the female group, the positive results suggested that the scores on GSD, GSA and the second-order factor were higher for females than they were for males in all factors.

3.6 Other Evidences of Validity

In all samples, the HGS subscales were significantly related to each other (men: r=.24; women: r=.58).

The scores of the HGS subscales were compared between the groups established for the BSRI (Bem, 1974), as "masculine" and "feminine" (see Table 5). Thus, in the samples of men (masculine: n=30, 21.9%; feminine: n=16, 11.68%) and women (masculine: n=27, 10.34%; feminine: n=88, 33.72%), the differences were analyzed between the two groups "masculine" and "feminine." The "masculine" group among the sample of men and the "feminine" group among the women tended to show higher scores for GSA and GSD, with only the latter being significant.

With regard to the Pearson correlations between the HGS subscales and the measures of distress and well-being, in the sample of men, a negative significant relationship was found between Global Severity Index (GSI from Brief Symptoms Scale) and GSA (r=-0.41), while the WHO-5 was positively and significantly related to the same subscale (r=0.39). In the case of women, though lower values, we found the same significant relationship between GSA and GSI (r=-0.14) and the WHO-5 (r=0.13). GSD was not significantly related to any of such variables.

4. Discussion

Very few studies approach the study of gender identity using assessment instruments with samples of Spanish origin. For the first time, this study makes available a new measure in Spanish that introduces an innovative concept in the research and advance of Gender Psychology. As compared to the confusion prevailing between the concepts in the study of gender (Ashmore, 1990; Constantinople, 1973; Deaux and Major, 1987; Lewin, 1984; Lewin and Wild, 1991; Marsh and Myers, 1986; McCreary, 1990; Morawski, 1987; Spence, 1984, 1985, 1991, 1993, 1999), Hoffman had the merit of having proposed a new concise concept, with a robust theoretical framework of high interest (Hoffman, 1996; Hoffman et al., 2000). It was aimed at specifying the composition of Gender Identity with the Gender Self-Confidence

aspect. In this line, the HGS intends to establish the solidity of the self-definition and the strength of the self-acceptance of gender, both factors forming Gender Self-Confidence. Our main goal was to make this measure available in Spanish to potentiate the use of new measures and innovative approaches to the study of gender identity.

This is the first time that results using confirmatory analysis have been reported on the factorial structure of HGS scores, also considering the differences between men and women. The second-order model was more appropriate to describe the relations between the observed variables and the latent factors and fitted the data better than the original two-factor solution (Hoffman et al., 2000). This finding is in line with the theoretical model supporting the instrument that shows that the factor "Gender Self-Confidence" comprises the two factors evaluated in the HGS: Gender Self-Definition and Gender Self-Acceptance. In this regard, our data support the original theoretical proposal (Hoffman, 1996), highlighting the relevance of specifying a second-order factor to explain the relationship between both factors. In addition, the findings of the present study provide support for the reliability of the Spanish version of HGS scores in a university male and female sample.

Item 4 ("My perception of myself is positively associated with my biological sex"), originally belonging to GSD, was found to be significantly related to the other GSA subscale, and in the second-order model, with the higher factor. Analyzing the content of the item, we found that the term "positively" might have an undesired effect on Spanish participants' responses to the item, which might be understood as implying some kind of positive acceptance, thus going beyond the mere statement of a direct relationship between a respondent's perception of him/herself and his/her biological sex.

This is the first study that applied a rigorous invariance testing strategy in the form of a MACS analysis to the HGS in order to examine the comparability of its hypothesized factor structure across gender. The configural invariance (Model 1) provides information as to whether participants from the two groups use the same conceptual framework to answer a specific scale item. The metric invariance (Models 2 and 3) provides information on whether scale items are being interpreted in the same way across gender groups. Scalar invariance (Models 4 and 5) is evaluated by assessing the equivalence of item intercepts, that is, the contribution made by each item to measuring the construct. In our samples, the factor structure of the HGS appears to be equally robust across sex in the comparison of the factor loading, but no equivalence is found between the intercepts. It is possible that the factor structure of the HGS is affected by the impact of the differences of the culture of masculinity and femininity in the construction of gender identity for each sex (Lewin, 1984; Hoffman et al., 2000). However, researchers (Cheung and Rensvold, 2002) have argued that ΔS-B χ^2 is very sensitive to sample

size and nonnormality, and thus, have recommended two alternative criteria: (a) achieve an adequate fit to the data and (b) negligible ΔCFI values between models. In this regard, in all of the equivalence models evaluated, the goodness of fit indices are acceptable, and the ΔCFI value does not exceed .01. Therefore, according to these specifications, it could be concluded that the models exhibit sufficient evidence of invariance across sex in all comparison levels.

Tests for latent means differences reveal statistically significant differences between men and women on the GSD subscale and the higher order factor, but not on the GSA subscale. Spanish women tended to have higher levels of gender self-definition and self-acceptance than males. This finding might be interpreted as evidence that the female gender culture leads women to define their gender identity with more accuracy and robustness and that they feel more comfortable with their gender identity than men. This might be related to the consideration that the construction of female subjectivity is influenced by specific power dynamics established through the use of language and the way the female subject is represented in speech (Foucault, 1968, 1983), a set of values and lifestyles as a reference framework for fixing the man/woman duality (Lagarde, 1990), the threat of marginality and rejection as a response to non-assumption of the dominant social rules (Butler, 1990), the symbolic use of the woman's body (Bourdieu, 2000), and the fixation on biological sex as a key element in building female identity (Foucault, 2005).

Based on the relationship with BSRI, we found significant differences in the GSD subscale when comparing the "masculine" to the "feminine" group in both samples, separated by sex. In this regard, it could be expected that the firmness of the definition of gender identity would be conceptually related to the consistency of the sex of each person. It is interesting to highlight that, in both subscales, the "masculine" group of men and the "feminine" group of women obtained higher scores. Again, this finding highlights the link between the definition and the acceptance of gender identity with the biological sex and the factors traditionally associated with it (Bem, 1974; Spence et al., 1975).

With regard to the relationship between HGS and the other instruments, the expected relationships were found: a higher acceptance of gender identity was related to greater wellbeing in the person and lower distress levels. The fact that there were no significant relationships with the other subscale may be due to the fact that the content of the gender self-definition mentions clarity and firmness in the concept of being a man or a woman, with no other assessment for it. On the contrary, the gender self-acceptance scale does contain a connotation of evaluation on the subscription of the gender identity itself, and therefore, it may occur that non-acceptance is related to greater personal distress.

5. Limitations and Future Research Directions

The limitations of this study are mainly found in the extraction and the characteristics of the sample, as this is a rather homogeneous group of undergraduate students. In following investigations, a larger, more diverse sample, in both age and origin, should be collected. Another limitation is the selection of the variables chosen in the study. It would be interesting to investigate the relationship between gender self-confidence and the arrangement of sexist attitudes and beliefs. Based on this study, different lines are offered to extend the study of gender identity by using this questionnaire; on the one hand, it would be very interesting to perform a cross-cultural study to compare the performance of the instrument in samples of different cultural origin. On the other hand, the analysis of the open question attached to the scale: "What do you mean by masculinity/femininity?" It would be very interesting to perform an analysis of the content by patterns to distribute the subjects according to their personal description of said concepts. Based on this, the differences in the scores may be analyzed in terms of gender self-acceptance and gender self-definition, as well as in relation to the rest of the measures of distress, well-being, and adjustment of the traditional gender stereotypes. This qualitative approach of the personal definition of masculinity/femininity could form the ideal complement to help us improve the content of the gender identity concept.

REFERENCES

Ashmore, R. D. (1990). "Sex, Gender and the Individual," in L. A. Pervin (ed.), *Handbook of Personality: Theory and Research*. New York: Guilford Press, 486–526.

Basow, S. A. (1992). *Gender: Stereotypes and Roles*. Pacific Grove, CA: Brooks/Cole.

Bem, S. L. (1972). "Psychology Looks at Sex Roles: Where Have All the Androgynous People Gone?" Paper presented at UCLA Symposium on Women, May, Los Angeles, CA.

Bem, S. L. (1974). "The Measuring Psychological Androgyny," *Journal of Consulting and Clinical Psychology* 42(2): 155–162.

Bentler, P. M. (1990). "Comparative Fit Indexes in Structural Models," *Psychological Bulletin* 107(2): 238–246.

Bentler, P. M. (1995). *EQS Structural Equations Program Manual*. Encino, CA: Multivariate Software, Inc.

Bentler, P. M. (2005). *EQS 6 Structural Equations Program Manual*. Encino, CA: Multivariate Software, Inc.

Bentler, P. M., and Bonett, D. G. (1980). "Significance Tests and Goodness of Fit in the Analysis of Covariance Structures," *Psychological Bulletin* 88: 588–606.

Bourdieu, P. (2000). *La dominación masculine [Masculine domination]*. Barcelona: Anagrama.

Butcher, J. N., Dahlstrom, W. G., Graham, J. R., Tellegen, A., and Kaemmer, B. (1989). *Manual for the Restandardized Minnesota Multiphasic Personality Inventory: MMPI-2*. Minneapolis, MN: University of Minnesota Press.

Butler, J. (1990). *Gender Trouble: Feminism and the Subversion of Identity*. New York: Routledge.

Byrne, B. M. (1994). "Burnout: Testing for the Validity, Replication, and Invariance of Causal Structure across Elementary, Intermediate, and Secondary Teachers," *American Educational Research Journal* 31(3): 645–673.

Byrne, B. M. (2008). "Testing for Multigroup Equivalence of a Measuring Instrument: A Walk through the Process," *Psicothema* 20(4): 872–882.

Byrne, B. M., Shavelson, R. J., and Muthén, B. (1989). "Testing for the Equivalence of Factor Covariance and Mean Structures: The Issue of Partial Measurement Invariance," *Psychological Bulletin* 105(3): 456–466.

Byrne, B. M., and Stewart, S. M. (2006). "The MACS Approach to Testing for Multigroup Invariance of a Second-order Structure: A Walk through the Process," *Structural Equation Modeling* 13(2): 287–321.

Cohen, J. (1988). *Statistical Power Analysis for the Behavioral Sciences.* 2nd edn. Hillsdale, NJ: Lawrence Erlbaum.

Constantinople, A. (1973). "Masculinity–Femininity: An Exception to a Famous Dictum?", *Psychological Bulletin* 80(5): 389–407.

Cheung, G. W. (2008). "Testing Equivalence in the Structure, Means, and Variances of Higher-order Constructs with Structural Equation Modeling," *Organizational Research Methods* 11(3): 593–613.

Cheung, G. W., and Rensvold, R. B. (2002). "Evaluating Goodness-of-fit Indexes for Testing Measurement Invariance," *Structural Equation Modeling* 9(2): 233–255.

Deaux, K., and Major, B. (1987). "Putting Gender into Context: An Interactive Model of Gender-related Behavior," *Psychological Bulletin* 94(3): 369–389.

Derogatis, L. R. (1993). *Brief Symptoms Inventory (BSI): Administration, Scoring and Procedures Manual.* 3rd edn. Minneapolis, MN: NCS Pearson, Inc.

Foucault, M. (1968/1966). *Las palabras y las cosas: una arqueología de las ciencias humanas [The Order of Things: An Archaeology of the Human Sciences]*. México: Siglo XXI.

Foucault, M. (1983/1969). *La arqueología del saber [The archaeology of knowledge]*. Madrid: Siglo XXI.

Foucault, M. (2005/1976). *La historia de la sexualidad vol. I. La voluntad de saber [History of sexuality vol. I. The will to knowledge]*. Madrid: Siglo XXI.

García-Mina Freire, A. (2004). "Adaptación española del Inventario de Rol Sexual," *Miscelánea Comillas* 62: 347–420.

Golombok, S., and Fivush, R. (1994). *Gender Development*. New York: Cambridge University Press.

Gough, H. G. (1952). "Identifying Psychological Femininity," *Educational and Psychological Measurement* 12(3): 427–439.

Guilford, J. P., and Zimmerman, W. S. (1949). *The Guildford-Zimmerman Temperament Survey: Manual of Instructions and Interpretations.* Beverly Hills, CA: Sheridan Supply Corp.

Hambleton, R. K. (1994). "Guidelines for Adapting Educational and Psychological Tests: A Progress Report," *European Journal of Psychological Assessment* 10(3): 229–244.

Hathaway, S. R., and McKinley, J. C. (1943). *The Minnesota Multiphasic Personality Inventory*. New York: Psychological Corporation.

Hoffman, R. M. (1996). "Gender: Issues of Power and Equity in Counselor Education Programs," *Counselor Education and Supervision* 36(2): 104–112.

Hoffman, R. M., Borders, L. D., and Hattie, J. A. (2000). "Reconceptualizing Femi ninity and Masculinity: From Gender Roles to Gender Self-confidence," *Journal of Social Behavior and Personality* 15(4): 475–503.

IBM Corp. (2010). *IBM SPSS Statistics for Windows, Version 19.0*. Armonk, NY: IBM Corp.

Jöreskog, K. G., and Sörbom, D. (1996). *LISREL 8 User's Reference Guide*. Uppsala: Scientific Software International.

Lagarde, M. (1990). "Identidad femenina" [Feminine Identity], *Revista de Coordinación de Estudios de posgrado. La mujer en la investigación y el posgrado* 20: 9–20.

Lewin, M. (1984). "Psychology Measures Femininity and Masculinity, 2: From '13 Gay Men' to the Instrumental–Expressive Distinction," in M. Lewin (ed.), *In the Shadow of the Past: Psychology Portrays the Sexes*. New York: Columbia University Press, 197–204.

Lewin, M., and Wild C. L. (1991). "The Impact of the Feminist Critique on Test, Assessment, and Methodology," *Psychology of Women Quarterly* 15(4): 581–596.

Marsh, H. W., and Myers, M. (1986). "Masculinity, Femininity, and Androgyny: A Methodological and Theoretical Critique," *Sex Roles* 14(7/8): 397–430.

Mateo, M. A., and Fernández, J. (1991). "La dimensionalidad de los conceptos de masculinidad y feminidad" [The dimensionality of the concepts of masculinity and feminity], *Investigaciones Psicológicas* 9: 95–116.

McCreary, D. R. (1990). "Multidimensionality and the Measurement of Gender Role Attributes: A Comment on Archer," *British Journal of Social Psychology* 29(3): 265–272.

Mintz, L. B., and O'Neil, J. O. (1990). "Gender Roles, Sex and the Process of Psychotherapy: Many Questions and Few Answers," *Journal of Counseling and Development* 68(4): 381–387.

Morawski, J. G. (1987). "The Troubled Quest for Masculinity, Femininity, and Androgyny," in P. Shaver and C. Hendrick (eds.), *Sex and Gender. Review of Personality and Social Psychology* 7. Thousand Oaks, CA: Sage, 44–69.

Muñiz, J., Elosua, P., and Hambleton, R. K. (2013). "Directrices para la traducción y adaptación de los tests: Segunda edición" [Guidelines for the translation and adaptation of tests: Second edition], *Psicothema* 25(2): 151–157.

Pereda, N., Forns, M., and Peró, M. (2007). "Dimensional Structure of the Brief Symptom Inventory with Spanish College Students," *Psicothema* 19(4): 634–639.

Satorra, A., and Bentler, P. (2001). "A Scaled Difference Chi-square Test Statistic for Moment Structure Analysis," *Psychometrika* 66(4): 507–514.

Spence, J. T. (1984). "Masculinity, Femininity and Gender-related Traits: A Conceptual Analysis and Critique of Current Research," in B. Maher and W. Maher

(eds.), *Progress in Experimental Personality Research: Vol. 13. Normal Personality Processes.* Orlando, FL: Academic Press, 1–97.
Spence, J. T. (1985). "Gender Identity and Implications for Concepts of Masculinity and Femininity," in T. B. Sonderegger (ed.), *Nebraska Symposium on Motivation: Psychology and Gender* 32. Lincoln, NE: University of Nebraska Press, 59–96.
Spence, J. T. (1991). "Do the BSRI and PAQ Measure the Same or Different Concepts?", *Psychology of Women Quarterly* 15(1): 141–165.
Spence, J. T. (1993). "Gender-related Traits and Gender Ideology: Evidence for a Multifactorial Theory," *Journal of Personality and Social Psychology* 64(4): 624–635.
Spence, J. T. (1999). "Thirty Years of Gender Research: A Personal Chronicle," in W. B. Swann, J. H. Langlois, and L. A. Gilbert (eds.), *Sexism and Stereotypes in Modern Society: The Gender Science of Janet Taylor Spence*. Washington, DC: American Psychological Association, 255–289.
Spence, J. T., Helmreich, R. L., and Stapp, J. T. (1975). "Ratings of Self and Peers on Sex Role Attributes and Their Relation to Self-esteem and Conceptions on Masculinity and Femininity," *Journal of Personality and Social Psychology* 32(1): 29–39.
Spence, J. T., and Swain, L. L. (1985). "Images of Masculinity and Femininity: A Reconceptualization," in V. O'Leary, R. Unger, and B. Wallston (eds.), *Women, Gender, and Social Psychology*. Hillsdale, NJ: Lawrence Erlbaum, 35–66.
Steiger, J. H. (1990). "Structural Model Evaluation and Modification: An Interval Estimation Approach," *Multivariate Behavioral Research* 25(2): 173–180.
Strong, E. K. (1936). "Interest of Man and Woman," *Journal of Social Psychology* 7: 49–67.
Terman, L., and Miles, C. C. (1936). *Sex and Personality: Studies in Masculinity and Femininity*. New York: McGraw-Hill.
Wilkinson, L., and Task Force on Statistical Inference, APA Board of Scientific Affairs (1999). "Statistical Methods in Psychology Journals: Guidelines and Explanations," *American Psychologist* 54(8): 594–604.
World Health Organization Regional Office for Europe (1998). *Wellbeing Measures in Health Care: The Depcare Project.* Report on a WHO Meeting Stockholm, Sweden, 12–13 February. København.

Figure 1 Expanded Model of Gender Self-Confidence
(Hoffman et al., 2000)

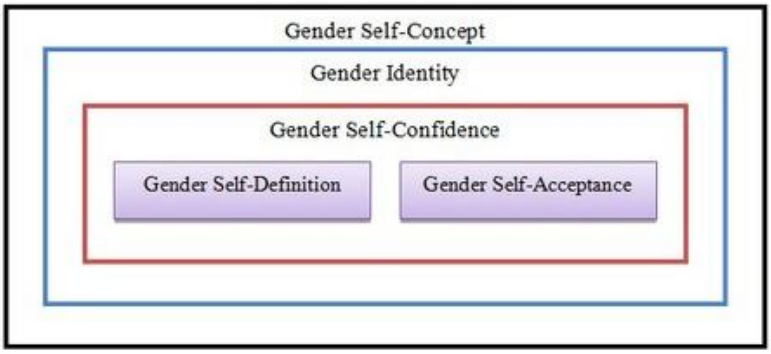


Table 1 Descriptive Statistics and Factor Loadings (CFA Second-Order Model) and Mean Scores Comparison of HGS for Males (n = 137) and Females (n = 261)

	Males			Females					
Items	*M (DT)*	r^c_{iX}	Factor loadings	*M (DT)*	r^c_{iX}	Factor loadings	Student t	*df*	Cohen's *d*
GSD	3.69 (1.02)			4.22 (.88)			-5.195*	245.242	-.57
1. Describe	3.00 (1.43)	.46	.488	3.55 (1.44)	.52	.535	-3.612*	396	-.38
4. Biology	4.69 (1.23)	.42	.439	5.07 (.97)	.48	.529	-3.095*	226.117	-.36
6. Define	3.33 (1.33)	.78	.812	3.94 (1.18)	.81	.864	-4.548*	249.524	-.49
7. Identity	3.53 (1.24)	.76	.840	4.07 (1.16)	.78	.861	-4.262*	261.493	-.45
9. Critical	3.93 (1.38)	.78	.841	4.44 (1.12)	.72	.766	-3.734*	229.145	-.42
12. Self-conp	3.76 (1.28)	.84	.896	4.29 (1.13)	.77	.824	-4.247*	396	-.45
14. Contrib	3.60 (1.31)	.74	.800	4.20 (1.09)	.63	.675	-4.893*	396	-.51
GSA	5.1 (.64)			5.13 (.60)			-.741	396	-.05
2. Confid	4.99 (.98)	.67	.697	4.88 (.95)	.68	.704	1.031*	396	.11
3. Stand	4.82 (.91)	.53	.566	4.68 (.96)	.47	.493	1.402	396	.15
5. Secure	5.23 (.90)	.63	.670	5.28 (.76)	.69	.732	-.494	396	-.06
8. Regard	4.97 (.83)	.68	.771	5.18 (.75)	.70	.771	-2.492*	396	-.27
10. Happy	5.17 (.94)	.70	.765	5.25 (.81)	.72	.792	-.899	396	-.09
11. Comfort	5.46 (.69)	.55	.592	5.54 (.68)	.67	.746	-1.121	396	-.12
13. Sense	5.06 (.78)	.70	.778	5.23 (.72)	.61	.700	-2.182*	396	-.23

Note: **p*<.01. ***p*<.05. $r^c_{iX:}$ item-total correlation. GSD = Gender Self-Definition; GSA = Gender Self-Acceptance.

Table 2 Summary of Fit Indices for the CFAs of HGS for Males (n = 137) and Females (n = 261).

Model	S-B χ^2	df	CFI	NNFI	SRMR	RMSEA
Males						
One-Factor Model	343.5255	77	.617	.547	.210	.160 (CI: .142, .176)
Two-Factor Model	120.890	76	.936	.923	.082	.066 (CI: .043, .087)
Second-Order Model	117.952	75	.938	.925	.082	.065 (CI: .041, .086)
Females						
One-Factor Model	389.038	77	548	.466	.110	.125 (CI: .112, .137)
Two-Factor Model	169.780	76	.864	.837	.080	.069 (CI: .055, .083)
Second-Order Model	119.806	75	.935	.921	.080	.048 (CI: .031, .063)

Note: S-B χ^2 = Satorra-Bentler scaled chi-square; CFI = comparative fit index; NNFI = non-normed fit index; RMSEA = root mean square error of approximation; SRMR = standardized root mean square residual; CI = 90% confidence interval.

Table 3 Measurement Invariance of HGS between Males (n = 137) and Females (n = 261).

	S-B χ2	df	CFI	RMSEA	Model Comparison	Δ*S-B χ2*	ΔCFI
Model 1 Configural, no constraints	286.784	150	.901	.048 (CI: .039, .056)	-		
Model 2 First-order factor loadings invariant	302.849	162	.898	.047 (CI: .039, .055)	2 vs. 1	15.937 (df=12, *p*=.19)	.003
Model 3 First- and second-order factor loadings invariant	292.770	164	.907	.045 (CI: .036, .053)	3 vs. 1	12.284 (df=14, *p*=.58)	.006
Model 4 First- and second-order factor loadings; first-order intercepts invariant	358.803	178	.897	.051 (CI: .043, .058)	4 vs. 1	80.174 (df=28, *p*=.00)	.004
Model 5 First- and second-order factor loadings; first- and second-order intercepts invariant	359.810	178	.897	.051 (CI: .043, .058)	5 vs. 1	82.290 (df=28, *p*=.00)	.004

Note: S-B χ^2 = Satorra-Bentler scaled chi-square; CFI = comparative fit index; RMSEA = root mean square error of approximation; CI = 90% confidence interval.

Table 4 Tests for Latent Mean Differences of HGS Factors between Males (n = 137) and Females (n = 261).

	S-B χ^2	df	CFI	RMSEA	*Difference Estimate*	*z*-value
GSD	343.767	178	.902	.048 (CI: .041, .056)	.222	3.333**
GSA					.034	.662
Second-Order Factor	338.388	177	.902	.048 (CI: .040, .056)	.583	4.375**

Note: **p<.05. GSD = Gender Self-Definition; GSA = Gender Self-Acceptance. S-B χ^2 = Satorra-Bentler scaled chi-square; CFI = comparative fit index; RMSEA = root mean square error of approximation; CI = 90% confidence interval.

Table 5 Comparison of Means of HGS Subscales between Masculine and Feminine as Grouped through the BSRI-12

HGS	*M (SD)* for Masculine (BSRI-12)	*M (SD)* for Feminine (BSRI-12)	Student t	*df*	Cohen's *d*
Males					
GSD	3.8 (.88)	3.02 (.85)	2.91*	44	.88
GSA	5.14 (.44)	5.1 (.77)	.25	44	.07
Females					
GSD	3.84 (.84)	4.27 (.85)	-2.35**	113	-.50
GSA	4.97 (.82)	5.13 (.69)	-.99	113	-.22

Note: *p<.01; **p<.05 GSD = Gender Self-Definition; GSA = Gender Self-Acceptance

Appendix

English version (Hoffman, 1996; Hoffman et al., 2000)	***Spanish version***
1. When I am asked to describe myself, being female/male is one of the first things 1 think of.	1. Cuando me preguntan que me describa personalmente, ser una mujer/un hombre es una de las primeras cosas en las que pienso.
2. I am confident in my femininity/masculinity.	2. Tengo confianza en mi feminidad/masculinidad.
3. I meet my personal standards for femininity/masculinity.	3. Coincido con mi propio ideal de feminidad/masculinidad.
4. My perception of myself is positively associated with my biological sex.	4. Mi percepción de mí misma/o se basa positivamente en mi sexo biológico.
5. I am secure in my femininity/masculinity.	5. Estoy segura de mi feminidad/masculinidad.
6. I define myself largely in terms of my femininity/masculinity.	6. Me defino a mí misma/o, en gran medida, en base a mi feminidad/masculinidad.
7. My identity is strongly tied to my femininity/masculinity.	7. Mi identidad está fuertemente vinculada a mi feminidad/masculinidad.
8. I have a high regard for myself as a female/male.	8. Tengo una buena consideración hacia mí misma como mujer/hombre.
9. Being a female/male is a critical part of how I view myself.	9. Ser mujer/hombre es una parte fundamental de cómo me veo a mí misma.
10. I am happy with myself as a female/male.	10. Estoy contenta/o conmigo misma como mujer/hombre.
11. I am very comfortable being a female/male.	11. Me siento muy cómoda siendo mujer/hombre.
12. Femininity/masculinity is an important aspect of my self-concept.	12. La feminidad/masculinidad es un aspecto importante del concepto que tengo de mí misma.
13. My sense of myself as a female/male is positive.	13. El sentido de mí misma/o como mujer/hombre es positivo.
14. Being a female/male contributes a great deal to my sense of confidence.	14. Ser mujer/hombre contribuye mucho a mi seguridad en mí misma

Addleton Academic Publishers

Journal of Research in Gender Studies 8(2), 2018
pp. 106–123, ISSN 2164-0262, eISSN 2378-3524 doi:10.22381/JRGS8220186

REFUSING TO SERVE LGBT PEOPLE: AN EMPIRICAL ASSESSMENT OF COMPLAINTS FILED UNDER STATE PUBLIC ACCOMMODATIONS NON-DISCRIMINATION LAWS

CHRISTY MALLORY
mallory@law.ucla.edu
The University of California, Los Angeles,
School of Law
(corresponding author)
BRAD SEARS
sears@law.ucla.edu
The University of California, Los Angeles,
School of Law

ABSTRACT. While there is increasing acceptance of a norm of non-discrimination against LGBT employees, opponents of LGBT rights are asserting a right to refuse services, particularly those related to wedding celebrations and health care, to LGBT people. While the media and court cases have focused on a limited set of known examples, to date, little is known about the overall incidence of public accommodations discrimination against LGBT people. This study is the first to measure how frequently existing state public accommodations non-discrimination laws are used by LGBT people. Analysis of available data from 16 states that prohibit sexual orientation and gender identity discrimination in public accommodations shows that these laws are used by LGBT people at rates similar to the use of race non-discrimination laws by people of color and the use of sex non-discrimination laws by women. Nationally, on average, approximately 4 complaints of sexual orientation and gender identity discrimination in public accommodations are filed for every 100,000 LGBT adults each year, compared to approximately 3 complaints of race discrimination filed for every 100,000 adults of color, and 1 complaint of sex discrimination filed for every 100,000 women. This study shows that public accommodations discrimination is reported far less frequently than employment discrimination by all protected groups – by a factor of ten. Second, while further research is needed to determine how frequently religious grounds are the basis for the discrimination against LGBT people alleged in these complaints, such motivations are not increasing the rates of discrimination to levels significantly higher than public accommodations discrimination against people of color and women. Notably, data analyzed in this study reflect current legal interpretations by courts that have upheld the historic limited religious exemptions to state non-discrimination laws.

Keywords: public accommodations discrimination; sexual orientation; gender identity

How to cite: Mallory, Christy, and Brad Sears (2018). "Refusing to Serve LGBT People: An Empirical Assessment of Complaints Filed under State Public Accommodations Non-Discrimination Laws," *Journal of Research in Gender Studies* 8(2): 106–123.

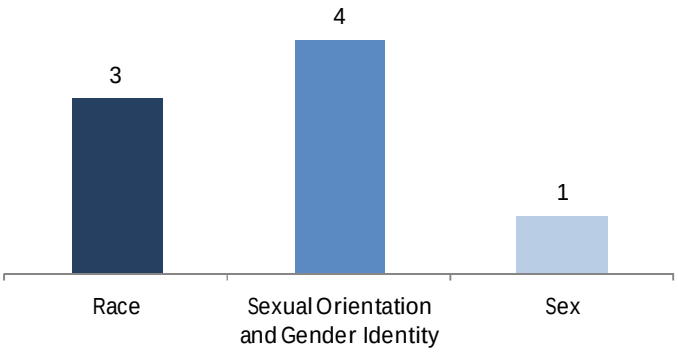
Received 29 November 2017 • Received in revised form 15 May 2018
Accepted 16 May 2018 • Available online 5 June 2018

Introduction

Current debates about discrimination against LGBT people have moved from a focus on employment to services provided to the public. Under the terminology of non-discrimination laws, these places of business are called "public accommodations." While there is increasing acceptance of a norm of non-discrimination against LGBT employees, opponents of LGBT rights are asserting a right to refuse services, particularly those related to wedding celebrations and health care services, to LGBT people. While the media and court cases have focused on a limited set of known examples, to date, little is known about the overall incidence of public accommodations discrimination against LGBT people.

Over the past four decades, a number of states have enacted laws protecting LGBT people from discrimination in public accommodations,[1] as well as other areas such as employment and housing.[2] These state laws protect just under half (48%) of the 10 million LGBT adults in the US from discrimination based on sexual orientation and gender identity in public accommodations.[3] Over half of the LGBT adult population in the U.S. is not covered by state-level laws that provide express protection from public accommodations discrimination based on sexual orientation or gender identity.[4] (Figure 1)

Figure 1 National Population-Adjusted Complaint Rates (per 100,000)



During this same time, many states have passed laws expanding protections for religiously-motivated conduct. As of April 2018, 27 states had laws that strengthened protections for religiously-motivated conduct beyond the protections offered by the federal Constitution.[5] Some of these laws target LGBT people for discrimination or allow government officials to refuse to perform marriages for same-sex couples. In addition to relying on such laws to discriminate against LGBT people, individuals have argued that state and constitutional free exercise provisions shield them from having to comply with state-level LGBT non-discrimination laws.

Recently, the media and the public have been more focused on these issues in part because of the case *Masterpiece Cakeshop v. Colorado Civil Rights Commission*, in which the U.S. Supreme Court will decide whether a baker may claim an exemption from Colorado's LGBT non-discrimination law because of his religious belief that marriage should be between one man and one woman.[6] Despite this increased attention, however, little is known about the overall incidence of public accommodations discrimination against LGBT people in the U.S. and the extent to which such discrimination is religiously motivated.

This study is the first to measure how frequently existing state public accommodations non-discrimination laws are used by LGBT people. Analysis of available data from 16 states that prohibit sexual orientation and gender identity discrimination shows that these laws are used by LGBT people at rates similar to the use of race non-discrimination laws by people of color and the use of sex non-discrimination laws by women. At the national level, on average, approximately 1 to 4 complaints per 100,000 protected adults are filed per year: 4 complaints of sexual orientation and gender identity discrimination are filed for every 100,000 LGBT adults each year; 3 complaints of race discrimination are filed for every 100,000 adults of color; and 1 complaint of sex discrimination filed for every 100,000 women.

Legal Landscape of Public Accommodations Laws and Religious Refusal Laws in the U.S.

LGBT people are not protected from discrimination in public accommodations under federal law or the non-discrimination laws of most states. As of April 2018, 19 states and the District of Columbia had state laws prohibiting discrimination based on sexual orientation and gender identity in public accommodations.[7] Two additional states had laws prohibiting discrimination based on sexual orientation in public accommodations, but not gender identity.[8] Despite steady progress in the passage of LGBT-inclusive non-discrimination laws in the early 2000s, no state has passed legal protections from public accommodations discrimination based on sexual orientation

discrimination in nine years. Delaware was the most recent state to add such protections in 2009.[9] Although Utah passed a law prohibiting discrimination based on sexual orientation and gender identity in 2015, the law only applies to employment and housing – not to public accommodations.[10]

Since the 1990s, there has been an increase in the number of state laws that offer protections to individuals who refuse to provide goods or services according to their religious or moral beliefs. Many of these laws are modeled after the federal Religious Freedom Restoration Act (RFRA) and provide that a state may not substantially burden an individual's religious exercise unless the state is using the least restrictive means to further a compelling government interest.[11] As of April 2018, 21 states had religious freedom laws modeled after the federal RFRA.[12] Other religious exemption laws allow individuals to refuse to provide certain services based on religious objection, regardless of whether the state has a compelling interest in prohibiting such discrimination. As of April 2018, seven states had laws that allow child welfare agencies to refuse to serve children or families based on their religious beliefs;[13] four states had laws that allowed medical professionals to refuse to provide care based on religious beliefs;[14] three states had laws that allowed government officials to refuse to perform marriages based on religious beliefs;[15] and one state had a broad law that allowed individuals and private businesses to discriminate against LGBT people based on religious beliefs in a range of settings including employment, housing, and public accommodations.[16]

In addition to state religious freedom laws, federal and state constitutions provide protections from government actions that burden religious freedom. However, the federal Free Exercise Clause and the free exercise clauses of many state constitutions provide more limited protections for religious exercise than the federal RFRA, state RFRAs, and other state religious exemption laws. In *Employment Division v. Smith*,[17] the U.S. Supreme Court held that that the Free Exercise Clause does not shield religious objectors from laws that are neutral toward religion and generally applicable, even if they have a restrictive effect on religious conduct. While many state free exercise clauses have been interpreted to offer the same scope of protection as the federal Free Exercise Clause, some have been interpreted to offer stronger protections for religious objectors.[18] In these states, courts have applied constitutional free exercise protections much like a RFRA – requiring the state to show that it has used the least restrictive means to further a compelling government interest if it has placed a substantial burden on religious exercise.[19]

In some states, religious objectors have argued that they should be allowed to refuse service to LGBT people because religious freedom laws and constitutional free exercise provisions exempt them from having to comply with non-discrimination laws.[20] For example, in *Masterpiece Cakeshop* a Colorado

baker argued that the federal Constitution's free exercise and free speech clauses exempt him from having to make a cake for a same-sex couple, as the state's non-discrimination law requires.[21] In the cases we were able to identify, courts have held that federal and state constitutional free exercise protections do not exempt public accommodations from having to comply with non-discrimination laws.[22]

Evidence of Discrimination Based on Sexual Orientation and Gender Identity in Public Accommodations

Public accommodations discrimination against LGBT people has been documented in several recent surveys. For example, a nationally representative survey conducted in 2017 found that 16% of LGBTQ respondents said they had been discriminated against by a doctor or health clinic based on their sexual orientation or gender identity, and 18% said they had avoided going to a doctor or seeking health care because they were afraid of discrimination.[23] Over 30% of respondents to the survey said they had thought about moving because they had experienced unequal treatment or discrimination based on their sexual orientation or gender identity where they lived.[24] A 2016 survey by the Center for American Progress found that 1 in 4 LGBT people reported experiencing some form of discrimination based on their sexual orientation or gender identity in the prior year.[25] In the area of public accommodations, 12.0% of respondents reported that they avoided public places (such as stores or restaurants), 5.0% avoided public transportation, 6.7% avoided doctor's offices, and 6.1% avoided getting services they or their family needed out of fear of experiencing discrimination in those places.[26] The study found that transgender respondents and LGB respondents with disabilities were even more likely to avoid public accommodations out of fear of discrimination than their cisgender and non-disabled counterparts.[27] In addition, 31% of transgender respondents to the 2015 U.S. Transgender Survey reported experiencing one type of mistreatment in a place of public accommodations in the prior year.[28] And, a 2009 Lambda Legal survey found that 56% of LGB and 70% of transgender respondents had experienced some form of discrimination in a health care setting, including being refused care, having health care professionals refuse to touch them, and having health care professionals use harsh or abusive language.[29]

These surveys do not capture the extent to which such discrimination is religiously motivated, but anecdotal reports provide some evidence of discrimination based on religious objection.[30] Often, such discrimination occurs in the context of providing wedding-related services or health care, but also occurs in other areas such as adoption, health care, and government services. For example, a 2018 Human Rights Watch report documented several in-

stances of religiously motivated public accommodations discrimination against LGBT people in a number of areas.[31]

Impact of Discrimination on Health of LGBT People

Experiences of discrimination and harassment have been shown to contribute to health disparities for LGBT people. The *minority stress model* suggests that prejudice, stigma, and discrimination expose LGBT individuals to excess stress, which, in turn, results in health disparities for sexual minority and transgender individuals compared with cisgender, heterosexual people.[32] Research that has focused on mental and physical health outcomes of LGBT people supports the minority stress model.[33] A number of studies have found evidence of links between minority stressors and negative mental health outcomes in LGB people, including a higher prevalence of psychiatric disorders,[34] including depression[35] and psychological distress,[36] as well as loneliness, suicidal intention,[37] deliberate self-harm,[38] and low self-esteem.[39] Studies have also linked minority stress in LGB people to an increased prevalence of high-risk health-related behaviors, such as tobacco use, drug use, and alcohol disorders.[40]

For example, a 2016 study by the American Psychological Association based on a nationally representative sample linked experiences of discrimination to increased stress for LGBT people.[41] The study found that LGBT adults reported higher average levels of perceived stress (6.0 vs. 5.0 on a 10-point scale) and were more likely to report extreme levels of stress (39% v. 23%) in the prior 30 days than adults who were non-LGBT.[42] The study also found that many LGBT respondents had experienced discrimination.[43] Nearly one-fourth (23%) of the LGBT adults reported that they had ever been unfairly stopped, searched, questioned, physically threatened or abused by the police; nearly one-fourth (24%) reported being unfairly discouraged by a teacher or advisor to continue their education; and one-third (33%) reported being unfairly not hired for a job.[44]

Methodology

This study largely replicates the methodology used in three previous studies analyzing employment discrimination complaints and one study analyzing housing discrimination complaints.[45]

First, we collected data on public accommodations discrimination complaints from the administrative agencies responsible for enforcing non-discrimination laws in the 22 states[46] that prohibited sexual orientation or gender identity discrimination by statute at the time of data collection. Specif-

ically, we collected data on the number of public accommodations discrimination complaints filed each year, from 2008 through 2014, based on race, sex, sexual orientation or gender identity. In many cases, state agencies made this information available in their annual reports published online. Where the data were not available online or only limited data were available, we contacted the state agencies directly and requested the information.

We were able to collect data, either online or through direct contact with the agencies, from 16 of the 21 states that prohibited discrimination based on sexual orientation or gender identity at the time of data collection (Appendix). For 11 states, we were able to gather complete data for all years; for the other five states we were able to gather data for at least four years. We did not obtain information about the number of complaints that alleged discrimination based on more than one of the studied characteristics. That is, we do not know the number of complaints alleging, for example, discrimination based on both sexual orientation and sex. For purpose of this analysis, complaints of discrimination based on multiple characteristics are counted as individual complaints under each characteristic.

Next, we divided the number of complaints filed each year on each basis by the number of people most likely to file these types of discrimination complaints in the state's population, and then multiplied that figure by 100,000 to get the rate of complaints filed per 100,000 adults. We assume that race discrimination complaints are most likely to be filed by people of color, sex discrimination complaints are most likely to be filed by women, and sexual orientation and gender identity complaints are most likely to be filed by LGBT people. We used yearly data from the American Community Survey (ACS) to find the population totals for women and adults of color each year. For the underlying population for race discrimination complaints, we included all non-whites and all Hispanic or Latino-identified adults in the population.

The ACS does not collect data on sexual orientation or gender identity, so it is not possible to determine the size of the LGBT population directly from ACS data. In order to estimate the number of LGBT adults in each state, we applied the percentage of people in the adult population who identified as LGBT in Gallup polling data collected between 2012 and 2014 to the number of people each state's adult population from yearly ACS data.

We subtracted the estimated number of transgender adults from the LGBT population in several states where gender identity complaint data were not available, so that our underlying population for purposes of adjusting sexual orientation complaints was LGB only. First, we subtracted transgender adults from the LGBT population for all years in four states because three of the states do not include gender identity in their non-discrimination statutes (New Hampshire, New York, and Wisconsin) and one state did not add the protections until October 2014 (Maryland), so these four states did not collect

any data on gender identity discrimination complaints during the time period of this study.[47] Second, we subtracted transgender adults from the LGBT population in two other states (Connecticut and Hawaii) for the years before gender identity protections were added to their laws.[48] Finally, we subtracted transgender adults in California for one year of data (2011) because the state could not provide the number of complaints filed on the basis of gender identity for that year. We estimated the number of transgender adults in these states by applying the percentage of the U.S. population that identified as transgender (0.3%)[49] to the state's adult population.

This methodology was followed for each of the 16 states from which we were able to collect data on public accommodations discrimination complaints, across all years of complaint data. After all annual population-adjusted complaint rates were determined for a state, we averaged the annual rates by filing basis. This provided annual population-adjusted complaint rates for sexual orientation and gender identity complaints, race discrimination complaints, and sex discrimination complaints in 16 states.

We were unable to analyze the per capita rate of gender identity complaints separately because few states were able to provide separate data on complaints filed on the basis of sexual orientation and complaints filed on the basis of gender identity. Most states combine these filing bases in their records.

Findings

When the size of the LGBT population is incorporated into the analysis of complaint rates, our measure shows that per capita sexual orientation and gender identity public accommodations discrimination complaints are filed at similar rates to sex and race discrimination complaints.

- At the national level, on average, approximately 1 to 4 complaints per 100,000 protected adults are filed per year: 4 complaints of sexual orientation and gender identity discrimination are filed for every 100,000 LGBT adults each year; 3 complaints of race discrimination are filed for every 100,000 adults of color; and 1 complaint of sex discrimination filed for every 100,000 women.
- The adjusted rate for sexual orientation and gender identity complaints is similar to, but slightly higher than, the adjusted rate for sex discrimination complaints.
- The adjusted rate for sexual orientation and gender identity discrimination is nearly the same as the adjusted rate for race discrimination complaints.

Population-adjusted complaint rates provide an important context in which to analyze the raw complaint data

Population-adjusted complaint rates provide the context in which we can effectively analyze discrimination complaint rates based on race, sex, and sexual orientation and gender identity. The raw data alone suggest that the number of sexual orientation discrimination complaints is small compared to large numbers of complaints based on race and sex. However, even the most disparate adjusted rates significantly decrease the differences suggested by the raw data.

For example, in Illinois from 2008 through 2014, an average of 62 complaints of race discrimination in public accommodations and 22 complaints of sex discrimination in public accommodations were filed annually. By contrast, an average of 13 complaints of sexual orientation or gender identity discrimination in public accommodations were filed each year.

Those raw numbers suggest that sex discrimination complaints are filed almost twice as often as sexual orientation complaints, and race discrimination complaints are filed almost five times more often than sexual orientation and gender identity complaints. But the number of adults of color in Illinois (3,437,000 in 2014) and the number of women in Illinois (5,097,000 in 2014) are both greater than the number of LGBT adults in the state (376,000 in 2014). Once we adjust the data for the population of each group, we are able to make more relevant comparisons. Adjusted rates show that annually, on average, approximately 1 complaint of sex discrimination in public accommodations was filed per 100,000 women, 2 complaints of race discrimination in public accommodations were filed per 100,000 adults of color, and 4 complaints of sexual orientation or gender identity discrimination in public accommodations were filed per 100,000 LGBT adults. Although a seemingly small number of sexual orientation and gender identity discrimination complaints were filed, they are actually filed by LGBT people at a higher frequency than both race discrimination complaints and sex discrimination complaints.

Sexual orientation and gender identity discrimination complaints are filed at a rate similar to, although on average slightly higher than, sex discrimination complaints

Table 1 compares the adjusted rate for sexual orientation and gender identity complaints with that for sex discrimination complaints in the 16 states for which data were collected. On a national level, the adjusted complaint rate for sexual orientation and gender identity is similar to, though on average slightly higher than, the adjusted complaint rate for sex discrimination complaints. In all 16 states, sexual orientation and gender identity complaints were filed at a slightly higher rate than sex discrimination complaints. The

disparities in filing rates in across the states vary from approximately one to nine complaints per 100,000 protected adults each year.

Table 1 Sex and sexual orientation & gender identity (complaints per 100,000 adults)

	Sexual orientation & gender identity	Sex
Average	3.9	0.5
California	1.2	0.3
Colorado	6.3	0.9
Connecticut	3.7	1.3
D.C.	10.1	1.2
Hawai'i	0	0.7
Illinois	3.6	0.4
Maryland	0.7	0.1
Minnesota	5.4	0.1
Nevada	6.2	0.3
New Hampshire	1.7	0.2
New York	3.2	0.6
Oregon	1.6	0.2
Rhode Island	2.7	0.7
Vermont	6.5	0.7
Washington	4.4	0.2
Wisconsin	4.6	0.2

Sexual orientation and gender identity discrimination complaints are filed at nearly the same rate as race complaints

Table 2 compares the adjusted rates for sexual orientation and gender identity complaints with that for race discrimination complaints in the 16 states for which data were collected. In nine states (California, Colorado, DC, Illinois, Minnesota, Nevada, New York, Rhode Island, and Washington), sexual orientation and gender identity complaints were filed at a higher rate than race discrimination complaints. In two additional states, sexual orientation and gender identity discrimination complaints were filed at nearly the same rate as race discrimination complaints (Maryland and Oregon). The disparities in filing rates in the remaining states varied from approximately one to nine more complaints of race discrimination than sexual orientation or gender identity discrimination per 100,000 protected adults each year.

Table 2 Race and sexual orientation & gender identity (complaints per 100,000 adults)

	Sexual orientation & gender identity	Sex
Average	3.9	3.3
California	1.2	0.6
Colorado	6.3	2.6
Connecticut	3.7	6.8
D.C.	10.1	2.4
Hawai'i	0	0.9
Illinois	3.6	1.9
Maryland	0.7	0.8
Minnesota	5.4	4.9
Nevada	6.2	2.3
New Hampshire	1.7	2.5
New York	3.2	1.9
Oregon	1.6	1.5
Rhode Island	2.7	2.4
Vermont	6.5	15.2
Washington	4.4	1.6
Wisconsin	4.6	5.2

Discussion

Our finding that complaints of race, sex, and sexual orientation or gender identity discrimination in public accommodations are filed at similar rates is consistent with the findings of four previous studies that analyzed employment and housing discrimination complaints using a similar methodology: *Evidence of Housing Discrimination Based on Sexual Orientation and Gender Identity: An Analysis of Complaints Filed with State Enforcement Agencies, 2008–2014* (2016);[50] *Evidence of Employment Discrimination Based on Sexual Orientation and Gender Identity: An Analysis of Complaints Filed with State Enforcement Agencies, 2008–2014* (2015);[51] *Evidence of Employment Discrimination on the Basis of Sexual Orientation and Gender Identity: Complaints Filed with State Enforcement Agencies 1999–2007* (2008);[52] and *Do Gay Rights Matter?: An Empirical Assessment* (2001).[53]

The two most recent studies analyzing employment discrimination complaints found that, nationally, race, sex, and sexual orientation or gender identity complaints are filed at average rates of about 4 to 7 complaints per 10,000 workers per year. Generally, the complaint rates found in the oldest study, across all types of discrimination, were higher than the rates found in the two later studies. The 2001 study calculated a range for the sexual orientation complaint rate because data available at that time did not allow for reliable estimates of the size of the LGBT workforce in each state. The

range was from 3.4 complaints to 18.2 complaints per 10,000 LGB workers. The rate of sex discrimination complaints found in the 2001 study was 5.4 complaints per 10,000 female workers, and the rate of race discrimination complaints was 20.2 complaints per 10,000 workers of color.

The study analyzing housing discrimination complaints also found that, nationally, race, sex, and sexual orientation or gender identity complaints were filed at similar rates. The study found that, on average, 3 complaints of sexual orientation or gender identity discrimination in housing were filed for every 100,000 LGBT adults each year; 5 complaints of race discrimination in housing were filed for every 100,000 adults of color each year; and 1 complaint of sex discrimination in housing was filed for every 100,000 women each year.

Like the previous studies, the present study found that complaints of race, sex, and sexual orientation or gender identity discrimination are filed at similar rates. The present study also shows that public accommodations discrimination is reported far less frequently than employment discrimination by all protected groups – by a factor of ten. While further research is needed to determine how frequently religious grounds are the basis for discrimination against LGBT people, the findings indicate that such motivations are not increasing the rates of discrimination to levels significantly higher than public accommodations discrimination against people of color and women. Of course, current data reflects current legal interpretations by courts that have found that religious exemptions to non-discrimination laws are limited. If the U.S. Supreme Court, in *Masterpiece Cakeshop v. Colorado Civil Rights Commission*, were to interpret a broader religious exemption protected by the federal Constitution, it may give license for more people to discriminate against LGBT people when providing services.

Limitations

Potential Impact of Complaints Alleging More than One Type of Discrimination
From the data provided by the agencies, we were unable to determine how many complaints alleged discrimination based on more than one of the studied characteristics. For example, we could not determine how many complaints of gender identity discrimination also alleged sex discrimination. In the data provided, complaints alleging more than one type of discrimination were considered separate complaints of each type of discrimination. Because there may be overlap in complaints alleging discrimination based on sexual orientation or gender identity and another characteristic protected under state law (such as race, sex, or disability), the addition of sexual orientation and gender identity to existing state non-discrimination laws may result in fewer new complaints filed with state agencies than our estimate suggests.

Separate Analysis of Gender Identity Public Accommodations Discrimination Complaint Rates

Various studies have found that transgender individuals experience substantially higher rates of discrimination than LGB people. However, due to inadequate data collection and recording methods, we were unable to analyze the rate of gender identity complaints filed by transgender people separately. This is a result of most states combining data on sexual orientation and gender identity discrimination filings. Of the 16 states that provided data for this study, only five states (Colorado, DC, Minnesota, Rhode Island, and Vermont) were able to provide separate data on gender identity complaints for at least four years. The omission of a separate analysis of gender identity discrimination complaints in this paper indicates a need for further research on the transgender population.

Motivation behind Discriminatory Treatment Alleged in Complaints

From the data provided by the agencies, we were unable to determine if the discrimination alleged was religiously motivated. Further research is needed to determine how frequently religious grounds are the basis for discrimination against LGBT people.

Conclusion

When comparing population-adjusted rates for filing public accommodations discrimination complaints with state enforcement agencies, we find that LGBT people file complaints of sexual orientation or gender identity discrimination at a rate similar to women filing sex discrimination complaints and people of color filing race discrimination complaints. At the national level, based on the states with available data, the average adjusted complaint rates for each type of discrimination are around 1 to 4 complaints per 100,000 protected adults per year.

This study shows that public accommodations discrimination is reported far less frequently than employment discrimination by all protected groups – by a factor of ten. Additionally, while it is clear that religious motivations underlie some public accommodations discrimination against LGBT people, it is not increasing rates of discrimination to be significantly higher than public accommodations discrimination against people of color or women. Of course, current data reflects current legal interpretations by courts that have found that religious exemptions to non-discrimination laws are limited. If the U.S. Supreme Court, in *Masterpiece Cakeshop v. Colorado Civil Rights Commission*, were to interpret a broader religious exemption protected by the federal Constitution, it may give license for more people to discriminate against LGBT people when providing services.

NOTES AND REFERENCES

1. *Movement Advancement Project, LGBT Policy Spotlight: Public Accommodations Nondiscrimination Laws* 4 (2018), available at http://www.lgbtmap.org/file/Spotlight-Public-Accommodations-FINAL.pdf.

2. Movement Advancement Project, Non-Discrimination Laws, http://www.lgbtmap.org/equality-maps/non_discrimination_laws (last visited Jan. 30, 2018).

3. This figure was calculated by first multiplying the percentage of the population that identifies as LGBT in each state by the estimated number of adults in each in 2016 (the most recent year of data available). State-level estimates were then grouped according to whether the state's non-discrimination law included sexual orientation and gender identity or did not include those characteristics in order to determine the number and percentage of the population that is covered by sexual orientation and gender identity-inclusive laws. The percentage of people who identify as LGBT in each state is available at The Williams Institute, LGBT Data & Demographics, https://williamsinstitute.law.ucla.edu/visualization/lgbt-stats/?topic=LGBT#density (last visited Feb. 15, 2018). Adult population data are available at U.S. Census Bureau, American Fact Finder, https://factfinder.census.gov/faces/nav/jsf/pages/searchresults.xhtml?refresh=t (last visited Feb. 15, 2018) (select 'Advanced Search,' select 'Geographies,' select 'State,' select all states, select the table titled 'Age and Sex, 2016 ACS 1-year estimates,' apply percentage of population aged 18 and over to total population in each state to calculate the number of adults in each state).

4. See note 3, *supra*, for methodology.

5. See notes 12–16, *infra*.

6. Supreme Court of the United States, Docket No. 16-111, https://www.supremecourt.gov/docket/docketfiles/html/public/16-111.html (last visited Apr. 19, 2018).

7. *Movement Advancement Project, Non-Discrimination Laws: Public Accommodations*, http://www.lgbtmap.org/equality-maps/non_discrimination_laws (last visited Apr. 19, 2018).

8. *Id.*

9. S.B. 121, 145th Gen. Assem., Reg. Sess. (Del. 2009) (enacted).

10. S.B. 296, 2015 Leg., Reg. Sess. (Utah 2015) (enacted).

11. 42 U.S.C. § 2000bb *et seq.* (2017).

12. Nat'l Conf. of State Legislatures, State Religious Freedom Restoration Acts (May 5, 2017), http://www.ncsl.org/research/civil-and-criminal-justice/state-rfra-statutes.aspx.

13. H.B. 24, 2017 Leg., Reg. Sess., (Ala. 2017) (enacted); Mich. Comp. Laws § 722.224e (2017); Miss. Code Ann. § 11-62-1 *et seq.* (2017); N.D. Cent. Code § 50-12-07.1 (2017); S.D. Codified Laws § 26-6-38 (2018); Tex. Hum. Res. Code Ann. § 45 (2017); Va. Code Ann. § 57-1 *et seq.* (2017).

14. Ala. Code § 22-21-B1 *et seq.* (2017); 745 Ill. Comp. Stat. 70/1 (2017); Miss. Code Ann. § 11-62-1 *et seq.* (2017); Va. Code Ann. § 63.2-1709.3 (2017).

15. Miss. Code Ann. § 11-62-1 *et seq.* (2017); N.C. Gen. Stat. § 51-5.5 (2017); utah Code Ann. § 63G-20-101 (2017).

16. Miss. Code Ann. § 11-62-1 *et seq.* (2017).

17. 494 U.S. 872 (1990).

18. See Stuart G. Parsell, "Note, Revitalization of the Free Exercise of Religion under State Constitutions: A Response to Employment Division v. Smith," 68 *Notre Dame L. Rev*. 747 (1993).

19. *Id.*

20. *State v. Arlene's Flowers*, 389 P.3d 543 (Wash. 2017); *Elane Photography v. Willock*, 309 P.3d 53 (2013); *Klein v. Or. Bureau of Labor and Industries*, 289 Or. App. 507 (2017); *Gifford v. McCarthy*, 23 N.Y.S.3d 422 (2016); *Masterpiece Cakeshop v. Colo. Civil Rights Comm.*, No. 14CA1351 (Colo. Ct. App. Aug. 13, 2015).

21. *Masterpiece Cakeshop v. Colo. Civil Rights Comm.*, No. 14CA1351 (Colo. Ct. App. Aug. 13, 2015).

22. Note 20, *supra*. In *Dep't of Fair Employment and Housing v. Cathy's Creations*, the baker also raised a free exercise defense based on the federal constitution. The court did not reach that argument, however, because it decided that a baker's refusal to create a cake for a same-sex couple's wedding was protected speech under the First Amendment's Free Speech Clause, reasoning that application of California's non-discrimination law to the baker amounted to compelled speech. *Dep't of Fair Employment & Housing v. Cathy's Creations*, No. BCV-17-102855 (Cal. Super. Ct. Feb. 5, 2018).

23. NPR, Robert Wood Johnson Foundation & Harvard T.H. Chan School of Public Health, *Discrimination in America: Experiences and Views of LGBTQ Americans* 10, 12 (2017), https://www.rwjf.org/content/dam/farm/reports/surveys_and_polls/2017/rwjf441734.

24. *Id.* at 13.

25. Sejal Singh & Laura E. Durso, *Widespread Discrimination Continues to Shape LGBT People's Lives in Both Subtle and Significant Ways* (May 2, 2017), https://www.americanprogress.org/issues/lgbt/news/2017/05/02/429529/widespread-discrimination-continues-shape-lgbt-peoples-lives-subtle-significant-ways/.

26. *Id.*

27. *Id.*

28. Sandy James et al., *2015 U.S. Transgender Survey* 16 (2016), http://www.transequality.org/sites/default/files/docs/USTS-Full-Report-final.pdf.

29. *When Health Care Isn't Caring: Lambda Legal's Survey on Discrimination against LGBT People and People Living with HIV* 5 (2009).

30. Zach Ford, *15 Examples of Anti-Discrimination Conservatives Want to Preserve*, July 2, 2013, https://thinkprogress.org/15-examples-of-anti-gay-discrimination-conservatives-want-to-preserve-597e54585a23/.

31. Human Rights Watch, *"All We Want Is Equality": Religious Exemptions and Discrimination against LGBT People in the United States* (2018), https://www.hrw.org/report/2018/02/19/all-we-want-equality/religious-exemptions-and-discrimination-against-lgbt-people.

32. Ilan H. Meyer, "Prejudice, Social Stress, and Mental Health in Lesbian, Gay, and Bisexual Populations: Conceptual Issues and Research Evidence," 129 *Psychol. Bull.* 674 (2009); Institute of Medicine, *The Health of Lesbian, Gay, Bisexual, and Transgender People: Building a Foundation for Better Understanding* 211–22 (2011).

33. *Id.*; Am. Psych. Assoc., *Stress in America: The Impact of Discrimination* 8, 22 (2016).

34. E.g., Katie A. McLaughlin, Mark L. Hatzenbuehler & Katherine M. Keyes, "Responses to Discrimination and Psychiatric Disorders among Black, Hispanic, Female, and Lesbian, Gay, and Bisexual Individuals," 100 *Am. J. Public Health* 1477 (2010); Ellen D.B. Riggle, Sharon S. Rostosky & Sharon G. Horne, "Marriage Amendments and Lesbian, Gay, and Bisexual Individuals in the 2006 Election," 6 *Sexuality Research & Social Policy* 80 (2009).

35. E.g., Robyn Zakalik & Meifen Wei, "Adult Attachment, Perceived Discrimination Based on Sexual Orientation, Depression in Gay Males: Examining the Mediation and Moderation Effects," 53 *J. of Counseling Psychol.* 302 (2006).

36. E.g., Vickie M. Mays & Susan D. Cochran, "Mental Health Correlates of Perceived Discrimination among Lesbian, Gay, and Bisexual Adults in the United States," 91 *Am. J. Pub. Health* 1869 (2001); David M. Heubner, Carol J. Nemeroff & Mary C. Davis, "Do Hostility and Neuroticism Confound Associations Between Perceived Discrimination and Depressive Symptom?," 24 *J. Soc. & Clinical Psychol.* 723 (2005); Ilan H. Meyer, "Minority Stress and Mental Health in Gay Men," 36 *J. of Health & Soc. Behav.* 38 (1995).

37. David M. Huebner, Gregory M. Rebchook & Susan M. Kegeles, "Experiences of Harassment, Discrimination, and Physical Violence among Young Gay and Bisexual Men," 94 *Am. J. of Pub. Health* 1200 (2004).

38. James Warner et al., "Rates and Predictors of Mental Illness in Gay Men, Lesbians and Bisexual Men and Women: Results from a Survey Based in England and Wales," 185 *British J. of Psychiatry* 479 (2004).

39. E.g., Jesus Ramirez-Valles et al., "Confronting Stigma: Community Involvement and Psychological Well-Being among HIV-positive Latino Gay Men," 27 *Hisp. J. of Behav. Sci.* 101 (2005).

40. E.g., Keren Lehavot & Jane M. Simoni, "The Impact of Minority Stress on Mental Health and Substance Use among Sexual Minority Women," 79 *J. Consult. Clin. Psychol.* 159 (2011); Sean Esteban McCabe, Wendy B. Bostwick, Tonda L. Hughes, Brady T. West & Carol J. Boyd, "The Relationship between Discrimination and Substance Use Disorders among Lesbian, Gay, and Bisexual Adults in the United States," 100 *Am. J. Public Health* 1946 (2010); Mark L. Hatzenbuehler, Katie A. McLaughlin, Katherine M. Keyes & Deborah S. Hasin, "The Impact of Institutional Discrimination on Psychiatric Disorders in Lesbian, Gay, and Bisexual Populations: A Prospective Study," 100 *Am. J. Public Health* 452 (2010); Genevieve N. Weber, "Using to Numb the Pain: Substance Use and Abuse among Lesbian, Gay, and Bisexual Individuals," 30 *J. Mental Health Counseling* 31 (2008).

41. Am. Psych. Assoc., *Stress in America: The Impact of Discrimination* 8, 22 (2016).

42. *Id.* at 22. LGBT adults were also more likely than non-LGBT adults to report experiencing increased stress over the past year (49% v. 34%). More than one-third of adults who are LGBT believed they were not doing enough to manage their stress, compared to one-fifth of non-LGBT adults saying the same (35% v. 20%).

43. The percentage of respondents who were reported as having experienced discrimination said that they had either experienced "at least one of the five day-to-

day stressors 'less than once a year' or more often; or ever experienced one of nine major forms of discrimination." The five day-to-day stressors included: 1. You are treated with less courtesy or respect than other people; 2. You receive poorer service than other people at restaurants or stores; 3. People act as if they think you are not smart; 4. People act as if they are afraid of you; 5. You are threatened or harassed." The nine major forms of discrimination included: 1. Have you ever been unfairly fired from a job? 2. Have you ever been unfairly denied a promotion? 3. For unfair reasons, have you ever been not hired for a job? 4. Have you ever been unfairly stopped, searched, questioned, physically threatened or abused by the police? 5. Have you ever been unfairly discouraged by a teacher or advisor from continuing your education? 6. Have you ever been unfairly prevented from moving into a neighborhood because the landlord or a realtor refused to sell or rent you a house or apartment? 7. Have you ever moved into a neighborhood where neighbors made life difficult for you or your family? 8. Have you ever been treated unfairly when receiving health care? 9. Have you ever been treated unfairly while using transportation (e.g., buses, taxis, trains, at an airport, etc.)? Press Release, Am. Psych. Assoc., 2015 Stress in America: Methodology, http://www.apa.org/news/press/releases/stress/2015/methodology.aspx (last visited Dec. 5, 2016) (see Measurement with Experience with Discrimination).

44. Am. Psych. Assoc., *Stress in America: The Impact of Discrimination* 6–7 (2016).

45. Christy Mallory & Brad Sears, *Evidence of Housing Discrimination Based on Sexual Orientation and Gender Identity: An Analysis of Complaints Filed with State Enforcement Agencies, 2008–2014* (2008), https://williamsinstitute.law.ucla.edu/wp-content/uploads/Housing-Discrimination-Complaints-2008-2014.pdf; Christy Mallory & Brad Sears, *Evidence of Employment Discrimination Based on Sexual Orientation and Gender Identity: An Analysis of Complaints Filed with State Enforcement Agencies, 2008–2014* (2015), available at http://williamsinstitute.law.ucla.edu/wp-content/uploads/Employment-Discrimination-Complaints-2008-2014.pdf; Christopher Ramos, M.V. Lee Badgett & Brad Sears, Williams Inst., *Evidence of Employment Discrimination on the Basis of Sexual Orientation and Gender Identity: Complaints Filed with State Enforcement Agencies 1999–2007* (2008), available at http://williamsinstitute.law.ucla.edu/wp-content/uploads/Badgett-Sears-Ramos-Emply-Discrim-1999-2007-Nov-08.pdf; William B. Rubenstein, "Do Gay Rights Laws Matter? An Empirical Assessment," 75 *S. Cal. L. Rev.* (2007), available at http://williamsinstitute.law.ucla.edu/wp-content/uploads/Rubenstein-Do-Gay-Rights-Laws-Matter-2001.pdf.

46. These states were: California, Colorado, Connecticut, Delaware, Hawaii, Illinois, Iowa, Maine, Maryland, Massachusetts, Minnesota, Nevada, New Hampshire, New Jersey, New Mexico, New York, Oregon, Rhode Island, Vermont, Washington, and Wisconsin. For purposes of this paper, DC is considered a "state." All of these states except four (Massachusetts, New Hampshire, New York, and Wisconsin) included both sexual orientation and gender identity in their public accommodations non-discrimination law at the time data were collected. Massachusetts, New Hampshire, New York, and Wisconsin included sexual orientation but not gender

identity in their public accommodations non-discrimination law at the time data were collected.

47. Connecticut added gender identity protections to its non-discrimination law in 2011, but the Connecticut Commission on Human Rights and Opportunities did not begin reporting gender identity complaints until fiscal year 2013. H.B. 6599, 2011 Gen. Assem., Jan. Sess. (Conn. 2011). *Compare* Conn. Comm. on Hum. Rights and Opportunities, Fiscal Year July 1, 2011 to June 30, 2012: *Case Processing Report, Cumulative Data* (2012), available at http://www.ct.gov/chro/lib/chro/2011-2012_Finished.pdf *to* Conn. Comm. on Hum. Rights and Opportunities, Fiscal Year July 1, 2012 to June 30, 2013: *Case Processing Report, Cumulative Data* (2013), available at http://www.ct.gov/chro/lib/chro/2012-2013_Finished.pdf. Hawaii clarified that the sexual orientation provisions of the state's non-discrimination law also prohibit discrimination based on gender identity. H.B. 546, 26th Leg., Reg. Sess. (Haw. 2011).

48. S.B. 212, 2014 Gen. Assem., Reg. Sess. (Md. 2014).

49. Gary J. Gates, Williams Inst., *How Many People are Lesbian, Gay, Bisexual, and Transgender?* 1 (2011), available at http://williamsinstitute.law.ucla.edu/wp-content/uploads/Gates-How-Many-People-LGBT-Apr-2011.pdf.

50. Mallory & Sears, *Evidence of Housing Discrimination Based on Sexual Orientation and Gender Identity: An Analysis of Complaints Filed with State Enforcement Agencies, 2008–2014*, *supra* note 45.

51. *Ibid.*

52. Ramos, Badgett & Sears, *supra* note 45; Rubenstein, *supra* note 45.

53. Rubenstein, *supra* note 45.

Addleton Academic Publishers

Journal of Research in Gender Studies 8(2), 2018
pp. 124–133, ISSN 2164-0262, eISSN 2378-3524 doi:10.22381/JRGS8220187

THE INSTRUMENTAL FUNCTION OF GENDERED CITIZENSHIP AND SYMBOLIC POLITICS IN THE SOCIAL CONSTRUCTION OF LABOR RIGHTS FOR MIGRANTS

RAMONA MIHĂILĂ
ramona.mihaila@ucdc.ro
Department of Foreign Languages and Literatures,
Dimitrie Cantemir Christian University, Bucharest
ELENA GREGOVA
elena.gregova@fpedas.uniza.sk
Department of Economics,
Faculty of Operation and Economics
of Transport and Communications,
University of Zilina, Zilina
KATARINA JANOSKOVA
katarina.janoskova@fpedas.uniza.sk
Department of Economics,
Faculty of Operation and Economics
of Transport and Communications,
University of Zilina, Zilina
JURAJ KOLENCIK
juraj.kolencik@fpedas.uniza.sk
Department of Economics,
Faculty of Operation and Economics
of Transport and Communications,
University of Zilina, Zilina
ANNE MARIE ARSENE
annemariearsene@yahoo.com
Department of International Relations,
Ovidius University, Constanța

ABSTRACT. Following Choo (2016), this article advances the notion that the rules regulating gendered citizenship may function as a tool of exclusion, isolating outsiders from individuals whom the state and society consider deserving of rights and respectability. We are interested in how prior research investigated the idea that migrant people and other civil society participants catalyze diverse material and moral

resources to assert rights and acceptance. Social disparities of gender, race, class, and nation determine the constituting of citizenship worldwide. Empirical and secondary data are employed to support the claim that as the frontiers of nation-states have become gradually indefinite, rising amounts of noncitizens live close by citizens, supplying a political incentive to allocate citizenship rights to migrant people and strengthening anti-immigrant attitudes and social disparities. Our research makes conceptual and methodological contributions to the conception that the societal principles of gender, race, and labor influence vigorous mechanisms of citizenship-making.

Keywords: gendered citizenship; symbolic politics; social construction; labor rights; migrants

How to cite: Mihăilă, Ramona, Elena Gregova, Katarina Janoskova, Juraj Kolencik, and Anne Marie Arsene (2018). "The Instrumental Function of Gendered Citizenship and Symbolic Politics in the Social Construction of Labor Rights for Migrants," *Journal of Research in Gender Studies* 8(2): 124–133.

Received 15 December 2017 • Received in revised form 16 May 2018
Accepted 16 May 2018 • Available online 5 June 2018

1. Introduction

Gender roles are instrumental in defining family migration conduct, shaping the manner decisions are taken. Because women are practically half of the labor force and are relevant actors in the determination to migrate either by themselves or in families, their feedbacks to the issue of earnings from relocation are fairly significant to grasping migration outcomes. Like men, women are supposed to migrate to raise their human capital. Labor markets are unstable, social settings are heterogeneous (Anderson and Kantarelis, 2016; Friedman and Gerstein, 2017; Machan, 2017; Plevný, 2017; Vogel, 2017), and women's involvement in the labor market is refashioning the decision-making process regarding migration. Women are driven by family, community, and way of acting grounds. The intricacy of family driving forces is indicated by the constructive connections for women as a whole but detrimental for women with children and the single ones, who do not establish family incentives as component of their mobility conduct. (Clark and Maas, 2015) The gendered particularities of migrant men and the gendered connections between them and their managers are mediated when men accomplish domestic undertakings that are categorized as being within the female sphere. The gendered patterns in nearly all societies incur women and men to separate requirements concerning their roles that regulate how mothers and fathers experience family separation. Migration and the wage-earning out of the country is in numerous circumstances a prerequisite of male progress and an imperative for planned or existent family life. (Souralová and Fialová, 2017)

2. Literature Review

As approaches toward the sharing out of housework are robustly embedded in cultural values and family routines, women from economies with relevant degrees of gender bias may display less integration to the conventional allocation of labor of an economy with more significant gender balance even if they take part in the host economy's labor market. The link between source-country gender functions and immigrant couples' allocation of labor may be improved or cut down being determined by whether the couple doles out the same upbringing. Among first-generation immigrants, expanded exposure to a novel social arrangement may amend the level to which embraced values edify couples' allocation of labor, bolstering the belief that gender functions are adjustable over time and context. The unsteady connection between source-country gender functions and women's unrewarded labor over time implies that cultural attributes (Balica, 2017; Gilbert, 2017; Mantalos, 2017; Popescu, 2017; Zogning, 2017) may be most appropriate to immigrant couples' allocation of household labor throughout the primary stage of migration, when families undergo important disturbance. (Frank and Hou, 2015)

Marital status is a significant stratifying variable for comprehending immigrant women's and men's labor force involvement, being indispensably associated with the double inconvenience immigrant women confront with in the labor force. Concretely, marriage may intensify the latter's detriment and its effects may differ by national lineage and religious routine, which are connected with cultural assumptions regarding wives' dependence to their husbands. Spouseless immigrant women's labor force involvement is less hindered by such regularizing requirements. Among immigrant men, wedlock enhances their labor force involvement likelihoods in comparison with single men. (Donato, Piya, and Jacobs, 2014)

The far-reaching integration of impoverished and working-class women into large-scale capitalism depends on a certain dogma of the family that maintains women's labor inexpensive. The gendered circumstances of neoliberalism have been typified by an enlargement of low-wage service labor for women (without a concomitant increase in men's labor) and the unceasing preponderance of women's accountability for reproductive work. The impasse of masculinity is created in the breach between the steady prevalent belief of men as income producers accountable for the financial welfare of the household and the positions accessible to lower-middle and proletarian men that unreservedly do not enable them to accomplish that requirement. While influential men in the labor market can conform to standards of hegemonic masculinity, the enlargement of women's positions and the absence of complementary chances for uninfluential men in the labor market makes the possibility of the opposite gender order a starting point of gender apprehen-

sions. The idea of women's emancipation as exclusively economic backs the concerns of governments and firms (Bratu, 2016; Klierova and Kutik, 2017; Mihăilă, 2017; Popescu Ljungholm, 2016) in increasing and intensifying the scope of worldwide capital. (Radhakrishnan and Solari, 2015)

3. Methodology

Using data from OECD, IZA World of Labor, ILO, and UNDESA, we performed an analysis and made estimates regarding the gendered social criteria and unbalanced intra-household power allocation that operate in male-controlled societies, hampering the chances for autonomous move among striving women migrants. Before any separate migratory undertaking is taken, a household-level migration consultation should take place over a distinct family member's migration eagerness. The intra-household migration process of making decisions is debated, with discrepancies in the level of blatant opposition/encouragement put forward by family members. Endeavoring migrants may not be in unequivocal dialogue with family members as regards their migration choices and roles, but they are incessantly tackling the gendered patterns that permeate their society that either reinforce or restrict their adjustability. Taking into account the gendered, socio-cultural barriers on their options and displacement (Fabre, 2017; Lucas, 2016; Peters, 2016; Tulloch, 2016), striving women migrants agentically refashion their migration goal as a logical continuation of their aiding roles, instead of aiming to thoroughly topple the gendered and generational power arrangement in which they are deep-seated. (Paul, 2015)

We inspect these data to empirically evaluate the gender connections that initiate a significant level of diverseness in the mechanism of migrant social capital recruitment (gender may be instrumental in the migrant structures in the process of global adjustability). Gender and framework influence the role of migrant networks. If women rely more than men on straightforward furtherance from their networks to migrate, they depend more on the connections that are more effectively experienced and more inclined to provide such assistance. Strong connections, e.g. close family members, are particularly decisive in their relocation, whereas both strong and weak connections may be fairly beneficial for men. Former migrants' capacity to provide direct backing with relocation (e.g. covering the expense of the move, providing lodging, assisting in identifying a job, etc.) leans on the degree of financial and material supplies they require. The gender of the former migrants may influence the degree to which they affect other individuals' decision and resourcefulness to move abroad. The resources that former migrants make achievable to current potential migrants are in addition influenced by historical models of migration. (Toma and Vause, 2014)

4. Results and Discussion

Our empirical evidence indicates that the rules regulating gendered citizenship may function as a tool of exclusion, isolating outsiders from individuals whom the state and society consider deserving of rights and respectability. Migrant people and other civil society participants catalyze diverse material and moral resources to assert rights and acceptance. Social disparities of gender, race, class, and nation determine the constituting of citizenship worldwide. As the frontiers of nation-states have become gradually indefinite, rising amounts of noncitizens live close by citizens, supplying a political incentive to allocate citizenship rights to migrant people and strengthening anti-immigrant attitudes and social disparities. The societal principles of gender, race, and labor (Campbell, Ross, and Thomson, 2017; Lăzăroiu, 2015; Nica, 2015; Popescu Ljungholm, 2017) influence vigorous mechanisms of citizenship-making. (Choo, 2016)

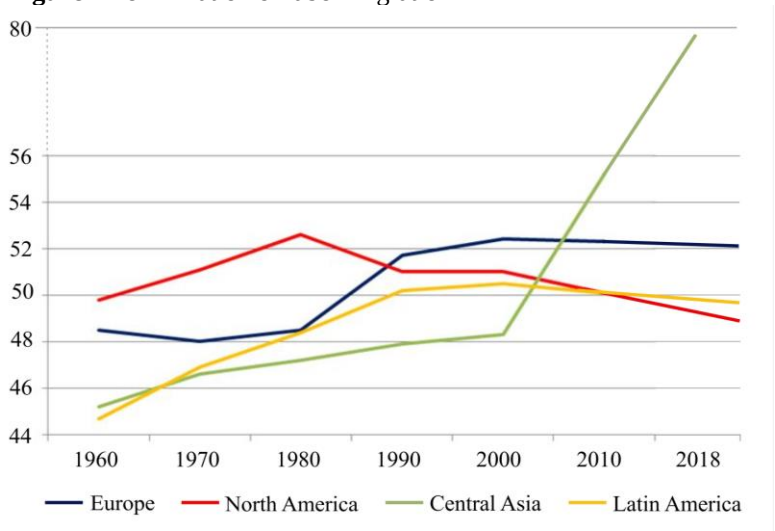
Immigrant women whose source economies exhibit more established gender functions experience more structural stumbling blocks in the host economy than other women. The gender functions constituted in source economies seem to be replicated at the family level after migration, and operate autonomously of the institutional frameworks in which they are established. The cogency of source-country gender functions decreases over time, illustrating assimilative conduct for first-generation immigrants in a different social setting. The conjunction between immigrant women's source-country gender functions and their proportion in compensated and unrewarded labor is most durable when the husband and wife belong to the same economy of origin and diminished if the husband is resident born. (Frank and Hou, 2015)

Perceived gender discrimination constitutes a clear-cut and decidedly sound driver of the readiness to migrate, but it does not appear to alter ensuing migration conduct. Women who observe they are not acted toward with appreciation and seemliness in their country are likely to relocate. Perceived gender discrimination undoubtedly influences the magnitude of possible female migration. The aspiration to move abroad is advanced for young, spouseless women who are remarkably proficient and inhabit an urban zone. Albeit women's disposition to move does not look to the household's earnings, it shapes the opportunity that they indeed do so. Of women who are prepared to migrate when a chance appears, particularly those from more affluent households choose to take action. Whereas gender bias precisely functions as a relevant determinant to move abroad, it does not furthermore influence the resulting decision to in fact migrate among individuals who have indicated their intention. Women's arrangement to relocate is neither improved nor hindered by gender bias, but to some extent clarified by various

personal aspects (e.g. household earnings or the social network). (Ruyssen and Salomone, 2018)

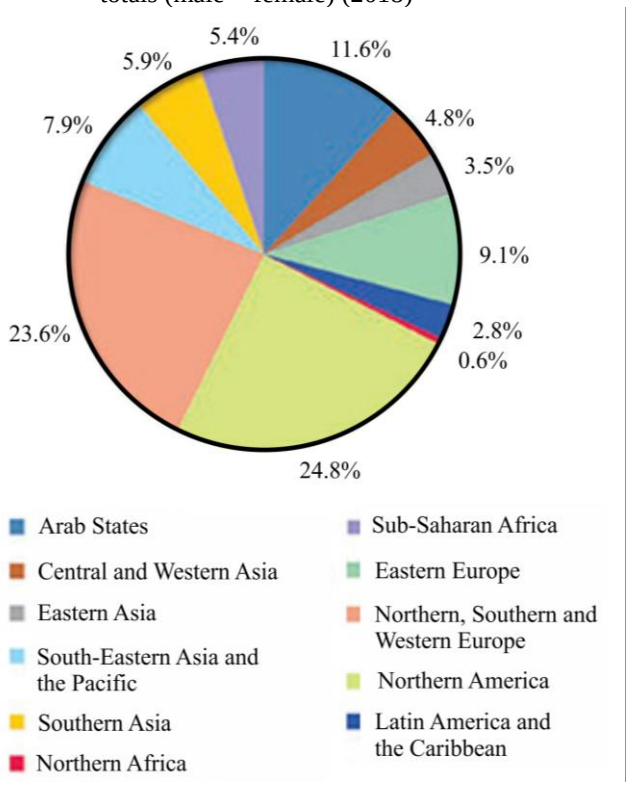
Future comparative research should analyze how migrant spouses may be more influential in the migration choice of left-behind ones than other family members. Even after clarifying the habitation of one's partner overseas, men and women resort to various kinds of connections to move abroad (distinct processes of network control may be instrumental in their adjustability). The most dominant types of mobile social capital in women's relocation are close family members, longer-run migrants and geographically robust structures. Such network connections tend to have the required resources and driving force (Devine, 2017; Lăzăroiu, 2017; Nica, 2017; Shin, 2017) to supply straightforward furtherance to possible women migrants. In male-controlled contexts where female relocation is curbed, particularly in its more autonomous forms, women may call for more adequate backing from their migrant ties than men so that they can move abroad. Labor market chances at landing place, migration schemes, requirements for family reintegration, and outright racism may influence gendered practices of migration together with the levels and kinds of resources migrant structures have. (Toma and Vause, 2014) (Figures 1–3)

Figure 1 Feminization of labor migration



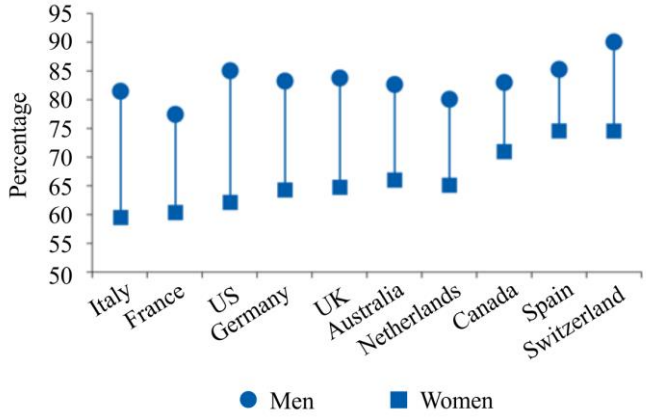
Sources: UNDESA and our estimates. % of women amongst the total number of international migrants.

Figure 2 Distribution of migrant workers, by broad subregion, totals (male + female) (2018)



Sources: ILO and our estimates.

Figure 3 Migrant labor force as a proportion of the total working-age migrant population in the 10 main OECD host countries (2018)



Sources: OECD; IZA World of Labor; and our estimates.

5. Conclusions

On the whole, these outcomes show that women, contingent on the national framework, constitute a substantial proportion of all breadwinners and of migrants. More research is required on the manners in which, as women have penetrated the labor force, the prearrangements are not about an individual male income producer having final word whether to migrate or not, but to some extent are intricate decision-making mechanisms (Binetti, 2017; Harris and Estevez, 2017; Mihăilă, Popescu, and Nica, 2016; Popescu et al., 2018) with compromises between two employees in the same domestic establishment. Accordingly, women are frequently not deadlocked migrants as they used to be. A limitation of this investigation is related to the fact that labor markets are fluctuating and are plausibly more unpredictable than whenever a while back. Women represent a large percentage of employees, and this has altered the migration decision-making mechanism. Access and exit from the labor market tends to be more inconstant for women and in such manner is the character of involvement. (Clark and Maas, 2015)

Acknowledgments
This paper was supported by Grant GE-1367551 from the American Association for Economic Research.

Author Contributions
All authors listed have made a substantial, direct and intellectual contribution to the work, and approved it for publication.

Conflict of Interest Statement
The authors declare that the research was conducted in the absence of any commercial or financial relationships that could be construed as a potential conflict of interest.

NOTE

A version of this paper was previously presented at the 12th European Social Science History conference, 4–7 April 2018, Queen's University, Belfast.

REFERENCES

Anderson, Emily, and Demetri Kantarelis (2016). "Incentive-Compatibility and Coasean Invariance in Property Affairs," *Contemporary Readings in Law and Social Justice* 8(2): 96–114.

Balica, Raluca (2017). "The Alienated Language of the Affective Commodity in Houellebecq's Novels," *Review of Contemporary Philosophy* 16: 143–149.

Binetti, Christopher (2017). "Sprouts of the Ancients: The Ancient Roots of Representation in the Greater Mediterranean Region from the Hittites to Rome," *Geopolitics, History, and International Relations* 9(2): 174–198.

Bratu, Sofia (2016). "The Critical Role of Social Media in Crisis Communication," *Linguistic and Philosophical Investigations* 15: 232–238.
Campbell, Jim, Susanne Ross, and Emily Thomson (2017). "Recession and Recovery in Scotland: The Impact on Women's Labor Market Participation beyond the Headline Statistics," *Journal of Research in Gender Studies* 7(1): 123–136.
Choo, Hae Yeon (2016). *Decentering Citizenship: Gender, Labor, and Migrant Rights in South Korea*. Stanford, CA: Stanford University Press.
Clark, William A. V., and Regan Maas (2015). "Interpreting Migration through the Prism of Reasons for Moves," *Population, Space and Place* 21: 54–67.
Devine, Nesta (2017). "Aims of Education in a Post-Neoliberal Context," *Knowledge Cultures* 5(6): 96–107.
Donato, Katharine M., Bhumika Piya, and Anna Jacobs (2014). "The Double Disadvantage Reconsidered: Gender, Immigration, Marital Status, and Global Labor Force Participation in the 21st Century," *International Migration Review* 48(S1): 335–376.
Fabre, Guilhem (2017). "Xi Jinping's Challenge: What Is behind China's Anti-corruption Campaign?," *Journal of Self-Governance and Management Economics* 5(2): 7–28.
Frank, Kristyn, and Feng Hou (2015). "Source-Country Gender Roles and the Division of Labor within Immigrant Families," *Journal of Marriage and Family* 77(April): 557–574.
Friedman, Hershey H., and Miriam Gerstein (2017). "Leading with Compassion: The Key to Changing the Organizational Culture and Achieving Success," *Psychosociological Issues in Human Resource Management* 5(1): 160–175.
Gilbert, Jane (2017). "Back to the Future? Aims and Ends for Future-oriented Science Education Policy – The New Zealand Context," *Knowledge Cultures* 5(6): 74–95.
Harris, Elizabeth C., and Mychel L. Estevez (2017). "The Role of Gender and Motherhood Ideologies in Perpetuating Workplace Inequality," *Journal of Research in Gender Studies* 7(2): 67–85.
Klierova, Martina, and Jan Kutik (2017). "One Stop Government – Strategy of Public Services for Citizens and Businesses in Slovakia," *Administratie si Management Public* 28: 66-80.
Lăzăroiu, George (2015). "The Educational Status of Refugee Youth from Syria," *Educational Philosophy and Theory* 47(13/14): 1383–1384.
Lăzăroiu, George (2017). "The Routine Fabric of Understandable and Contemptible Lies," *Educational Philosophy and Theory* 49(6): 573–574.
Lucas, Robert E.B. (2016). "Integral Migration in Developing Economies: An Overview of Recent Evidence," *Geopolitics, History, and International Relations* 8(2): 159–191.
Machan, Tibor R. (2017). "Moral Philosophy and Society," *Review of Contemporary Philosophy* 16: 104–135.
Mantalos, Panagiotis (2017). "The Greek Debt Crisis and the Economic Effects of Austerity," *Journal of Self-Governance and Management Economics* 5(2): 29–45.
Mihăilă, Ramona, Gheorghe H. Popescu, and Elvira Nica (2016). "Educational Conservatism and Democratic Citizenship in Hannah Arendt," *Educational Philosophy and Theory* 48(9): 915–927.

Mihăilă, Ramona (2017). "The Lying Epidemic," *Educational Philosophy and Theory* 49(6): 580–581.
Nica, Elvira (2015). "Labor Market Determinants of Migration Flows in Europe," *Sustainability* 7(1): 634–647.
Nica, Elvira (2017). "Political Mendacity and Social Trust," *Educational Philosophy and Theory* 49(6): 571–572.
Paul, Anju Mary (2015). "Negotiating Migration, Performing Gender," *Social Forces* 94(1): 271–293.
Peters, Michael A. (2016). "Biopolitical Economies of Debt," *Analysis and Metaphysics* 15: 7–19.
Plevný, Miroslav (2017). "Influence of the Fare Funding Type on Public Transport Demand – Case of Pilsen," *Administratie si Management Public* 28: 45–65.
Popescu, Gheorghe H. (2017). "Is Lying Acceptable Conduct in International Politics?," *Educational Philosophy and Theory* 49(6): 575–576.
Popescu, Gheorghe H., Mihai Mieilă, Elvira Nica, and Jean Vasile Andrei (2018). "The Emergence of the Effects and Determinants of the Energy Paradigm Changes on European Union Economy," *Renewable and Sustainable Energy Reviews* 81(1): 768–774.
Popescu Ljungholm, Doina (2016). "Organizational Social Capital and Performance Management," *Linguistic and Philosophical Investigations* 15: 108–114.
Popescu Ljungholm, Doina (2017). "Democratic Forms of Workplace Governance," *Analysis and Metaphysics* 16: 110–116.
Radhakrishnan, Smitha, and Cinzia Solari (2015). "Empowered Women, Failed Patriarchs: Neoliberalism and Global Gender Anxieties," *Sociology Compass* 9(9): 784– 802.
Ruyssen, Ilse, and Sara Salomone (2018). "Female Migration: A Way Out of Discrimination?," *Journal of Development Economics* 130: 224–241.
Shin, Hee-Young (2017). "The IMF's Financial Programming, Financialization, and Stagnant Corporate Investment in Korea after the Asian Financial Crisis," *Economics, Management, and Financial Markets* 12(4): 11–42.
Souralová, Adéla, and Hana Fialová (2017). "Where Have All the Fathers Gone? Remarks on Feminist Research on Transnational Fatherhood," *NORMA International Journal for Masculinity Studies* 12(2): 159–174.
Toma, Sorana, and Sophie Vause (2014). "Gender Differences in the Role of Migrant Networks: Comparing Congolese and Senegalese Migration Flows," *International Migration Review* 48(4): 972–997.
Tulloch, Lynley (2016). "The Transnational State, Neoliberalism and Environmental Education Policy: A New Zealand Case Study," *Contemporary Readings in Law and Social Justice* 8(2): 170–195.
Vogel, Dita (2017). "The Concept of Demand in the Context of Trafficking in Human Beings," *Psychosociological Issues in Human Resource Management* 5(1): 193–234.
Zogning, Felix (2017). "Comparing Financial Systems around the World: Capital Markets, Legal Systems, and Governance Regimes," *Economics, Management, and Financial Markets* 12(4): 43–58.

Addleton Academic Publishers

Journal of Research in Gender Studies 8(2), 2018
pp. 134–140, ISSN 2164-0262, eISSN 2378-3524 doi:10.22381/JRGS8220188

WHY ARE WOMEN MORE VULNERABLE IN DEVELOPING ALZHEIMER DISEASE DEMENTIA? THE EFFECT OF GENDER ON INCIDENCE, RISK FACTORS, AND RESULTS

RALUCA ANDREEA ANCA LUPU-STĂNESCU
raluca_stanescu1380@yahoo.com
University of Bucharest

ABSTRACT. This article reviews recent literature (e.g. Biasibetti et al., 2017; Bonsang, Skirbekk, and Staudinger, 2017; de Oliveira et al., 2018; Lee, Lee, and Kim, 2017; Malpetti et al., 2017; Mosconi et al., 2017) concerning how sex and gender generate risk and resilience for dementia. Using data from Alzheimer's Association, Alzheimer's Research UK, Medical Expenditure Panel Survey–Milken Institute, National Vital Statistics System–Mortality, and Statista, I performed analyses and made estimates regarding the relationship between gender and Alzheimer's disease (AD), dementia projections for babies born in 2018, increasing dementia prevalence by gender, projected cumulative savings associated with increased research incentives, expenditures linked to dementia, estimated lifetime risks for Alzheimer's in the U.S., by age and gender, and age-adjusted death rates for AD, by Hispanic origin, race for non-Hispanic population, and sex. Empirical and secondary data are employed to support the claim that AD asymmetrically involves more women than men in both incidence and acuteness.

Keywords: Alzheimer disease dementia; gender; incidence; lifetime risk

How to cite: Lupu-Stănescu, Raluca Andreea Anca (2018). "Why Are Women More Vulnerable in Developing Alzheimer Disease Dementia? The Effect of Gender on Incidence, Risk Factors, and Results," *Journal of Research in Gender Studies* 8(2): 134–140.

Received 18 December 2017 • Received in revised form 22 May 2018
Accepted 27 May 2018 • Available online 15 June 2018

1. Introduction

Men and women with Alzheimer's disease (AD) at equivalent degrees of global cognitive deterioration function dissimilarly on neuropsychological measures. (Ryan et al., 2018) Most of AD cases are infrequent and aging is the main risk element for developing it, involving more women than men. (Biasibetti et al., 2017)

2. Literature Review

In AD individuals, the links between instruction and occupation degrees and brain hypometabolism indicate a posterior temporo-parietal correlation in men and a frontal and limbic association in women, showing the participation of various networks. The metabolic congruence in both healthy elderly and AD implies superior thoroughness in the posterior default mode network for men and in the anterior frontal executive network for women. The bedrock of such brain gender dissimilarities in both aging and AD, accomplished by inspecting cerebral absorption, metabolic congruence and the consequences of instruction and occupation (Fast, O'Brien, and Block, 2017; Nica, Potcovaru, and Mirică (Dumitrescu), 2017; Popescu Ljungholm, 2016; Reimann, Pausch, and Diewald, 2017; Weede, 2016), is presumably at the joint between biological and sociodemographic elements. (Malpetti et al., 2017) Superior body mass index and creatinine clearance are protective concerning cognitive and operational deterioration for women, and complex cognitive reserve can bring about swifter drop in instrumental performance. *APOE* haplotypes impact the age at the beginning of AD, but not cognitive or functional decrepitude. (de Oliveira et al., 2018)

3. Methodology

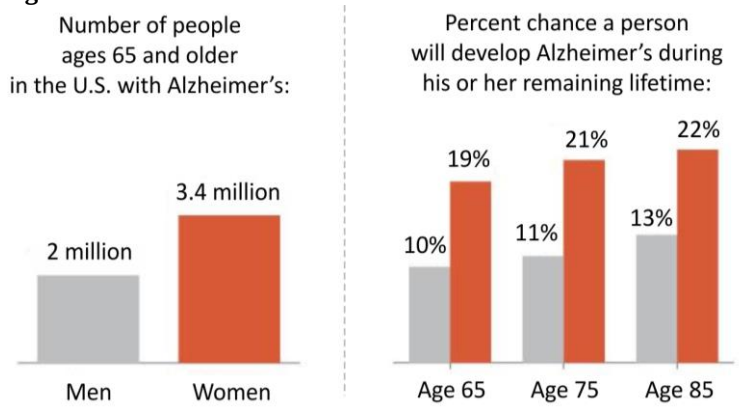
Using data from Alzheimer's Association, Alzheimer's Research UK, Medical Expenditure Panel Survey–Milken Institute, National Vital Statistics System–Mortality, and Statista, I performed analyses and made estimates regarding the relationship between gender and AD, dementia projections for babies born in 2018, increasing dementia prevalence by gender, projected cumulative savings associated with increased research incentives, expenditures linked to dementia, estimated lifetime risks for Alzheimer's in the U.S., by age and gender, and age-adjusted death rates for AD, by Hispanic origin, race for non-Hispanic population, and sex.

4. Results and Discussion

Gender dissimilarities in cognition are the consequences of biopsychosocial interplays during the life course. Cognition in later life should be associated with the chance arrangements (Argenton, 2017; Lăzăroiu, 2017; Nica, 2017; Popescu Ljungholm, 2017; Tulloch, 2016; Zogning, 2017) that socio-cultural settings do (not) supply. (Bonsang, Skirbekk, and Staudinger, 2017) Multimodality brain imaging displays sex disparities in advancement of the AD endophenotype, indicating that the preclinical AD stage is premature in

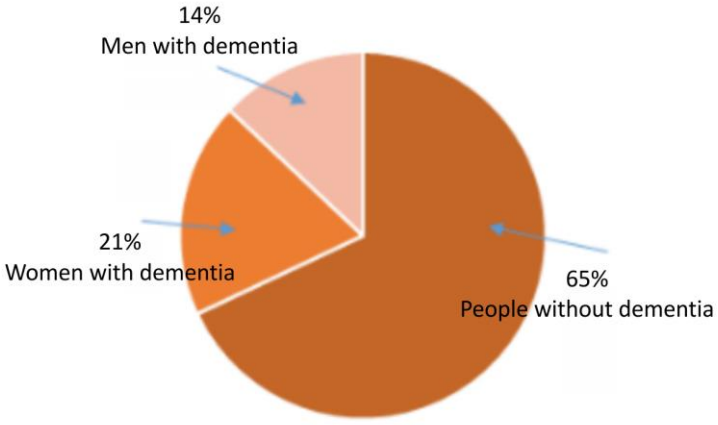
women's aging process and accompanies the endocrine evolution of perimenopause. The critical window for therapeutic intervention in women is premature in the endocrine aging process. (Mosconi et al., 2017) Behavioral and psychological symptoms of dementia in individuals with AD have a powerful association with cognitive impairment and deterioration in undertakings of ordinary living. Women patients having mild dementia are more susceptible to downheartedness than men patients. (Lee, Lee, and Kim, 2017) Age-related alterations in cognition (Balica, 2017; Machan, 2017; Petcu, 2017a, b; Rădulescu, 2017a, b; Sharp, 2016) are somewhat facilitated by the occurrence of neuropathology and neurodegeneration. (Hohman et al., 2017) (Figures 1–7)

Figure 1 Gender and Alzheimer's disease



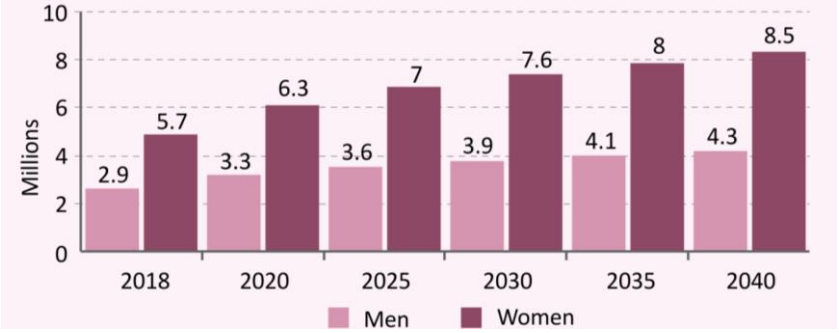
Sources: Alzheimer's Association; and my estimates.

Figure 2 Dementia projections for babies born in 2018



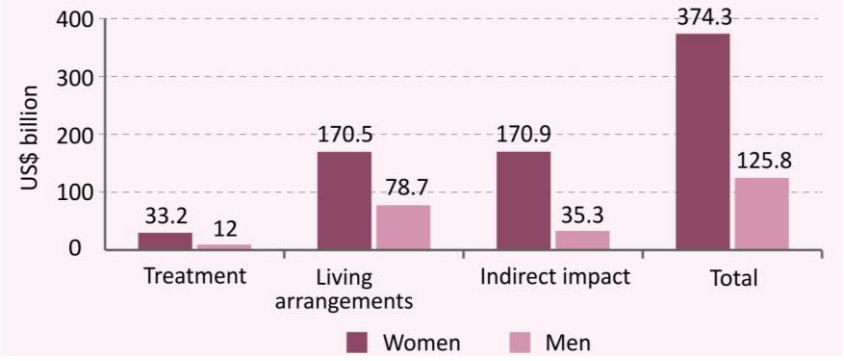
Sources: Alzheimer's Research UK; and my estimates.

Figure 3 Increasing dementia prevalence by gender (2018–2040)



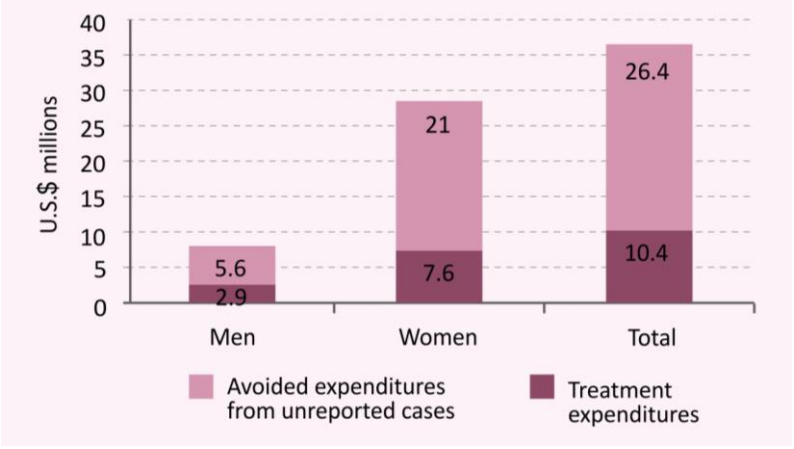
Sources: Medical Expenditure Panel Survey, Milken Institute; and my estimates.

Figure 4 Projected cumulative savings associated with increased research incentives (2018–2040)



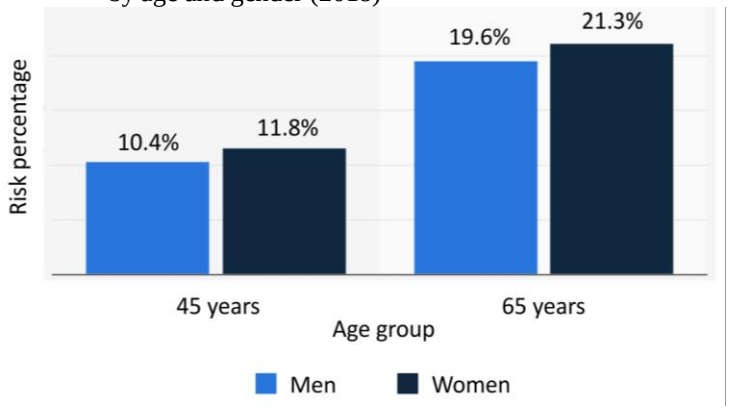
Sources: Medical Expenditure Panel Survey, Milken Institute; and my estimates.

Figure 5 Expenditures linked to dementia (average 2018)



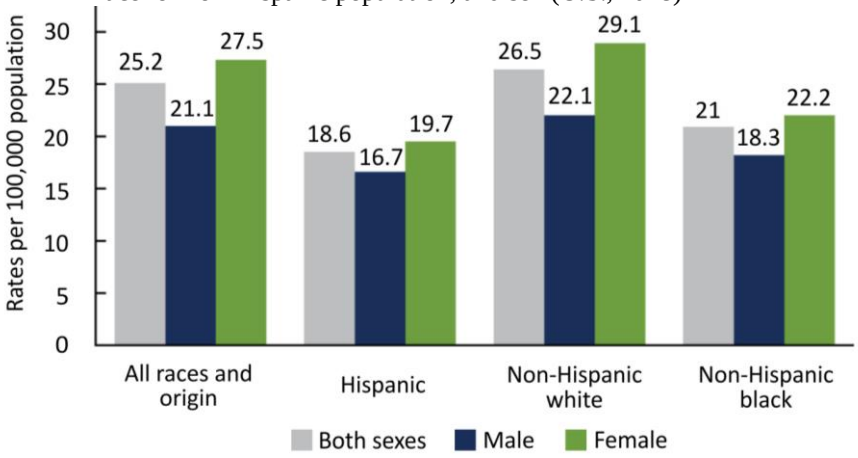
Sources: Medical Expenditure Panel Survey, Milken Institute; and my estimates.

Figure 6 Estimated lifetime risks for Alzheimer's in the U.S., by age and gender (2018)



Sources: Alzheimer's Association; Seshadri et al.; Chene et al. (2015); Statista; and my estimates.

Figure 7 Age-adjusted death rates for Alzheimer's disease, by Hispanic origin, race for non-Hispanic population, and sex (U.S., 2018)



Sources: National Vital Statistics System, Mortality; and my estimates.

5. Conclusions

AD asymmetrically involves women in both disease incidence and acuteness. The distinct biochemical reactions to stress between women and men can constitute an inherent, sex-dependent risk element for AD. (Yan et al., 2018) Women may outlive longer with AD but may have a swifter and more intense course in the related cognitive deterioration. Women are more expected to perform as a caregiver to individuals with dementia, therefore being at raised risk of caregiver anxiety and depression. (Derreberry and Holroyd, 2017)

Author Contributions
The author confirms being the sole contributor of this work and approved it for publication.

Conflict of Interest Statement
The author declares that the research was conducted in the absence of any commercial or financial relationships that could be construed as a potential conflict of interest.

REFERENCES

Argenton, Gerald (2017). "Update Yourself: Learning to Forget in the Knowledge Society," *Knowledge Cultures* 5(2): 18–31.

Balica, Raluca (2017). "The Alienated Language of the Affective Commodity in Houellebecq's Novels," *Review of Contemporary Philosophy* 16: 143–149.

Bonsang, Eric, Vegard Skirbekk, and Ursula M. Staudinger (2017). "As You Sow, so Shall You Reap: Gender-role Attitudes and Late-life Cognition," *Psychological Science* 28(9): 1201–1213.

Biasibetti, Regina, João Paulo Almeida dos Santos, Letícia Rodrigues, Krista Minéia Wartchow, Lucas Zingano Suardi, Patrícia Nardin et al. (2017). "Hippocampal Changes in STZ-model of Alzheimer's Disease Are Dependent on Sex," *Behavioural Brain Research* 316: 205–214.

de Oliveira, Fabricio Ferreira, Fernando Vieira Pereira, Glaucia Akiko Kamikado Pivi, Marilia Cardoso Smith, and Paulo Henrique Ferreira Bertolucci (2018). "Effects of *APOE* Haplotypes and Measures of Cardiovascular Risk over Gender-dependent Cognitive and Functional Changes in One Year in Alzheimer's Disease," *International Journal of Neuroscience* 128(5): 472–476.

Derreberry, Todd M., and Suzanne Holroyd (2017). "Dementia in Women," *Psychiatric Clinics* 40(2): 299–307.

Fast, Richard, Jessica O'Brien, and Walter E. Block (2017). "Welfare Harms Its Ostensible Beneficiaries," *Economics, Management, and Financial Markets* 12(3): 51–63.

Hohman, Timothy J., Doug Tommet, Shawn Marks, Joey Contreras, Rich Jones, Dan Mungas et al. (2017). "Evaluating Alzheimer's Disease Biomarkers as Mediators of Age-related Cognitive Decline," *Neurobiology of Aging* 58: 120–128.

Lăzăroiu, George (2017). "The Psychological Fabric of Ethical Subjectivity in Woody Allen's Films," *Contemporary Readings in Law and Social Justice* 9(2): 39–50.

Lee, Jeeye, Kang Joon Lee, and Hyun Kim (2017). "Gender Differences in Behavioral and Psychological Symptoms of Patients with Alzheimer's Disease," *Asian Journal of Psychiatry* 26: 124–128.

Machan, Tibor R. (2017), "Can People Obtain Objective Knowledge?" *Psychosociological Issues in Human Resource Management* 5(1): 90–119.

Malpetti, Maura, Tommaso Ballarini, Luca Presotto, Valentina Garibotto, Marco Tettamanti, Daniela Perani et al. (2017). "Gender Differences in Healthy Aging and Alzheimer's Dementia: A ^{18}F-FDG-PET Study of Brain and Cognitive Reserve," *Human Brain Mapping* 38(8): 4212–4227.

Mosconi, Lisa, Valentina Berti, Crystal Quinn, Pauline McHugh, Gabriella Petrongolo, Isabella Varsavsky et al. (2017). "Sex Differences in Alzheimer Risk: Brain Imaging of Endocrine vs Chronologic Aging," *Neurology* 89(13): 1382–1390.

Nica, Elvira, Ana-Mădălina Potcovaru, and Cătălina-Oana Mirică (Dumitrescu) (2017). "Job Loss, Unemployment, and Perceived Job Insecurity: Their Effects on Individuals' Health and Well-Being," *Psychosociological Issues in Human Resource Management* 5(2): 193–198.

Nica, Elvira (2017). "Foucault on Managerial Governmentality and Biopolitical Neoliberalism," *Journal of Self-Governance and Management Economics* 5(1): 80–86.

Petcu, Carmen (2017a). "Democratic Sexuality and Alienated Capitalism in Houellebecq's Novels," *Contemporary Readings in Law and Social Justice* 9(2): 81–87.

Petcu, Carmen (2017b). "Metaphysical Despair and Tragic Humanism in Malraux," *Analysis and Metaphysics* 16: 103–109.

Popescu Ljungholm, Doina (2016). "Organizational Social Capital and Performance Management," *Linguistic and Philosophical Investigations* 15: 108–114.

Popescu Ljungholm, Doina (2017). "Global Policy Mechanisms, Intergovernmental Power Politics, and Democratic Decision-Making Modes of Transnational Public Administration," *Geopolitics, History, and International Relations* 9(2): 199–205.

Rădulescu, Adina (2017a). "The Underlying Cognitive Mechanisms Involved in Consecutive Interpreting," *Linguistic and Philosophical Investigations* 16: 142–148.

Rădulescu, Adina (2017b). "Psychopathology in Juvenile Justice Youths: Demographic, Psychological, and Contextual Elements That Are Related to Violent Offending and Nonviolent Delinquency among Adolescents," *Contemporary Readings in Law and Social Justice* 9(1): 146–152.

Reimann, Mareike, Stephanie Pausch, and Martin Diewald (2017). "Work–Family Conflict in Germany: Psychological Contracts as Part of Employment Relationships in Work–Family Research," *Psychosociological Issues in Human Resource Management* 5(2): 127–153.

Ryan, Joseph J., Laura Glass Umfleet, David S. Kreiner, Amanda M. Fuller, and Anthony M. Paolo (2018). "Neuropsychological Differences between Men and Women with Alzheimer's Disease," *International Journal of Neuroscience* 128(4): 342–348.

Sharp, Emma (2016). "(Intra-)activity of Alternative Food: Performing a Hopeful Food Future," *Geopolitics, History, and International Relations* 8(2): 7–21.

Tulloch, Lynley (2016). "An Auto-Ethnography of Vegan Praxis and Encounters with the Meat-Eating Cyborg," *Review of Contemporary Philosophy* 15: 28–45.

Yan, Yan, Sky Dominguez, Daniel W. Fisher, and Hongxin Dong (2018). "Sex Differences in Chronic Stress Responses and Alzheimer's Disease," *Neurobiology of Stress* 8: 120–126.

Weede, Erich (2016). "Geopolitics, Institutions, and Economics: On the Rise and Decline of Civilizations," *Geopolitics, History, and International Relations* 8(1): 177–220.

Zogning, Felix (2017). "Comparing Financial Systems around the World: Capital Markets, Legal Systems, and Governance Regimes," *Economics, Management, and Financial Markets* 12(4): 43–58.

Addleton Academic Publishers

Journal of Research in Gender Studies 8(2), 2018
pp. 141–165, ISSN 2164-0262, eISSN 2378-3524 doi:10.22381/JRGS8220189

BEYOND MASCULINITY, THE FEMALE GAZE, AND THE GREEK CRISIS: EXPLORING ATHINA RACHEL TSANGARIS'S *CHEVALIER* AND ITS PARTICULARIZING RECEPTION

SOPHIE COAVOUX
sophie.coavoux@univ-lyon3.fr
Institute of Transtextual and Transcultural Studies,
The Jean Moulin University Lyon 3

ABSTRACT. Greek cinema has been in the limelight of the international film world mainly from 2009, a date that coincided with the beginning of a new wave brought about by the rise of a new generation of filmmakers and the international success of their films, against the backdrop of the Greek economic crisis. Athina Rachel Tsangari is a key figure among those filmmakers, and her cinematic work is being identified by many as central in the so-called "weird wave of Greek cinema." Recurrent and stereotypical dominant readings, especially Anglophone ones, assign to her highly acclaimed latest film *Chevalier* (2015) fixed multi-layered characterizations promoting a particularizing hermeneutics underpinned by a discourse of "foreignness" and "otherness." According to those naturalizing essentialist conceptions, *Chevalier* is supposed to be necessarily Greek, "female gaze-oriented," Greek crisis-labeled and weird. Using a point of view inspired by British cultural studies, this paper aims to investigate in a deconstructive manner this case study of "otherness building" transmitted through the dominant readings of the film related to intersectional power relations, including first gender and ethnic issues.

Keywords: cinema; gender; sexuality; masculinity; ethnicity; stereotype

How to cite: Coavoux, Sophie (2018). "Beyond Masculinity, the Female Gaze, and the Greek Crisis: Exploring Athina Rachel Tsangaris's *Chevalier* and Its Particularizing Reception," *Journal of Research in Gender Studies* 8(2): 141–165.

Received 30 March 2018 • Received in revised form 3 July 2018
Accepted 4 July 2018 • Available online 25 July 2018

1. Introduction

Apart from few international stars like Michalis Kakoyannis or Theo Angelopoulos, Greek cinema had remained virtually unknown outside Greece until the 2000s. Only since 2009 has it gained recognition and been in the limelight of the international film world against the backdrop of the Greek economic crisis (Needham, 2011). Indeed, 2009 is identified as a crucial date that coincided with the beginning of a new wave in Greek cinema brought about by the rise of a new generation of filmmakers and the international success of their films, many of which were prize-winning, the first being *Dogtooth* (Yorgos Lanthimos, 2009) (Chalkou, 2012; Metzidakis, 2014; Papadimitriou, 2016).

Furthermore, the rising visibility of a number of Greek films overlapped with the emergence of an international critical conversation concerning Greek cinema (Kazakopoulou & Fotiou, 2017). This phenomenon occurred, above all, among Anglophone critics and scholars and in the Anglophone media where diverse terms were coined to categorize, as a whole, a small number of "brilliantly strange" films like *Dogtooth* (Lanthimos, 2009) or *Attenberg* (Athina Rachel Tsangari, 2010), the term "weird wave of Greek cinema" being the most notable label (Rose, 2011).

In dominant discourse, this new cinematic trend was automatically interpreted as a product of Greece's economic turmoil, and as an allegorical response of this new generation of filmmakers to the severe financial, political and social crisis affecting the country. It should be noted that, in Greece, this new trend was not designated as "weird" but mainly as the "New Greek Current" (Chalkou, 2012: 244). Furthermore Greek directors and producers themselves refused this label, stressing their differences rather than any alleged common characteristics or collective identity (Poupou, 2014).

Tsangari is a key figure of contemporary Greek cinema and, along with that of Lanthimos, her cinematic work is being identified by many journalists and commentators as central in the "weird wave of Greek cinema." In the popular press, recurrent and stereotypical dominant readings of her work, especially Anglophone ones, also seem to be reductive, assigning to it fixed multi-layered characterizations and promoting a particularizing hermeneutics. Hence, according to those naturalizing essentialist conceptions, her film *Chevalier* (2015) is supposed to be necessarily Greek, "female gaze-oriented," Greek crisis-labeled and weird, and it seems to be impossible for Tsangari to escape this assigned identity. Remaining confined in a monolithic and potentially false reading, interpretations of that kind support an essentialist and stereotyped postulate, based on the *a priori* identification of the author's identity and that of her film, along with all alleged characteristics related to her gender and ethnicity, with some sort of orientalization being at work. It

is that phenomenon and that reception underpinned by a discourse of "foreignness" and "otherness" I refer to by using the expression "particularizing hermeneutics."

My purpose here is not to present exhaustively the work of Tsangari, nor to participate in the larger discussion about "what the Greek weird wave is," examining whether this label is legitimate or even if it corresponds to a real phenomenon, a subject that has been at the core of many analyses by scholars in recent years. Rather, in this paper, I carry out a critical overview of the multi-layered particularizing and reifying dominant reception of her highly acclaimed latest film, *Chevalier*, analyzing mainly Anglophone film critics' commentaries. In particular, using a point of view inspired by British cultural studies and Stuart Hall's (2001) reception theory, this paper aims to investigate in a deconstructive manner a case study of "otherness building" transmitted through the dominant readings of the film related to intersectional power relations, especially gender and ethnic issues.

I shall demonstrate how Tsangari's identity (notably her gender and ethnicity) partly shapes the reception and interpretation of her film. Furthermore, my aim is to provide an analysis of the reception and reviews of the film, criticizing them for being reductive in their treatment of how gender and ethnicity are represented in the film. This discussion shall not only further reception theory but, highlighting the construction of Otherness (central to the preoccupations of cultural studies), it will also contribute to questioning our understanding of cinema by expanding its approach beyond gender and the nation (Ponzanesi, 2016).

2. Theoretical Framework

In order to explain the choice of perspective and subject, it is necessary to first delineate the outlines of my theoretical framework and then give some contextual elements. Concepts of otherness, cultural identity, representation and stereotypes are of course of central importance in the debates within the humanities, especially after the postcolonial shift. Those reflections involve notably the categories of ethnicity and gender, set as categories of Otherness. Since "Every regime of representation is a regime of power" (Hall, 1989: 71), the connection between otherness, cultural identity and cinematic representation has aroused considerable interest across cultural studies and film studies, which has been accompanied by a redefinition of reception theory (Staiger, 1992).

Distancing itself from classical film theory and notably its conception of the spectator, British cultural studies have stressed that the audience is heterogeneous and that there are different and complex ways of interpreting a message (Staiger, 1992). In particular, in his famous text "Encoding/

Decoding," Hall (2001) suggested new frameworks for reading texts, "restructuring reception studies, even in the field of cinema – but emphasizing, developing, deepening and questioning concepts such as representation, identity, alterity, hybridism, colonization, the West and the East" (Prysthon, 2016: 79). Even if he was not a theorist of cinema, his thoughts have broadly influenced film studies' awareness that, while the "encoder-producer" encodes a meaning, there are different ways to decode them for the audience ("decoder-receiver"):

> The argument that decodings do not follow inevitably from encodings, that they are not identical, reinforces the argument of 'no necessary correspondence.' It also helps to deconstruct the commonsense meaning of 'misunderstanding' in terms of a theory of 'systematically distorted communication.' […] Majority audiences probably understand quite adequately what has been dominantly defined and professionally signified. The dominant definitions, however, are hegemonic precisely because they represent definitions of situations and events which are 'in dominance' (global). Dominant definitions connect events, implicitly or explicitly, to grand totalisations, to the great syntagmatic views-of-the-world: they take 'large views' of issues: they relate events to the 'national interest' or to the level of geopolitics even if they make these connections in truncated, inverted or mystified ways. The definition of a hegemonic viewpoint is, first, that it defines within its terms the mental horizon, the universe, of possible meanings, of a whole sector of relations in a society or culture; and, second, that it carries with it the stamp of legitimacy – it appears coterminous with what is 'natural,' 'inevitable,' 'taken for granted' about the social order. (Hall, 2001: 515, 516)

Hall (2001) proposed three frameworks to outline the different ways to receive (decode) a message: "the dominant-hegemonic position" (correspondence between encoding and decoding, when the audience adheres to the intended meaning of the message); an "oppositional code" (when the reading opposes the ideology encoded); a "negotiated code or position" (in-between position).

This frame of references can help to deepen an understanding of *Chevalier*'s reception and the dominance of restrictive gender-based and national-based readings. It appears that most of the reviews adopt a continuum of positions from "negotiated position" to "oppositional position." At any rate, there is no correspondence, but rather a discordance between the encoded and the decoded messages in the case of *Chevalier*. I argue that this discordance is mainly due to essentialist stereotypes internalized by most of the reviewers of the film.

Furthermore, as Sandra Ponzanesi has stressed in her book *Postcolonial and Transnational Approaches to Film* (2016), understandings of cinema have changed mainly since the 1990s, when simultaneously the postcolonial turn defined the concept of the Other as a subject of primary importance and when feminist film studies espoused an intersectional approach:

> Since the 1990s, feminist film studies has expanded its analytic paradigm to interrogate the representation of race, ethnicity, religion, sexuality, and the nation (Wiegman, 1998). This has included a new understanding of the role of audiences, consumption, and participatory culture, and a shift from textual analysis to broader cultural studies perspectives that include the role of institutions, reception, and technology. This is especially due to the contribution of black feminism in the US (see Hollinger, 2012), and its critique of psychoanalysis as a Western universalistic framework of patriarchy (see Gaines, 1986; Doane, 1991; hooks, 1992; Young, 1996; Kaplan, 1997), and the rise of postcolonial studies following the milestone publication of Edward Said's *Orientalism* (1978) and its aftermath. The development of postcolonial studies strongly impacted the way of analyzing representations of the Other, asking for a rethinking of long-standing tropes and stereotypes about cultural difference, and also the gendering and racialization of otherness. This ushered in methodological interrogations on how visual representations are implicated in the policing of boundaries between East and West, between Europe and the Rest, the self and the other. The postcolonial paradigm is called upon to challenge the implicit and intrinsic Eurocentrism of much media representation and film theory (Shohat & Stam, 1994), which implies a colonization of the imagination, where the Other is structurally and ideologically seen as deviant. (Ponzanesi, 2016: 25)

Those paradigms introduced by cultural studies, reception theory and postcolonial studies encourage reconsidering our understanding of film studies in the light of the imagination of the Other supported by arguments related to gender and ethnicity. This is precisely the aim of this paper. I will base my arguments on Anglophone reviews of the film chosen for their representativity of particularizing interpretation among a wide range of reviews available on Internet websites and journals (from the popular press), whether they are specialized in cinema or not.

3. Various Contextual Elements

Tsangari is a key figure of contemporary cinema. She has earned her reputation for multi-award winning films, she has been involved as a director/ producer, she has also worked as a projection designer, and on occasion as

an actor. Born in Athens, she studied Comparative Literature, Philosophy, and Drama in Thessaloniki, before entering first NYU's Performance Studies M.A. program, and then studying film directing at the University of Texas. She has so far made three feature-length films: *The Slow Business of Going* (2001), *Attenberg* (2010) and *Chevalier* (2015), along with short films (e.g. *The Capsule*, 2012, or *24 Frames Per Century*, 2013). She founded Haos Film in Austin, Texas, in 1997, and this production company relocated in 2002 to Athens. As a producer, within the framework of Haos film, she has supported the work of other filmmakers, notably that of Lanthimos and his three features *Kinetta* (2005), *Dogtooth* (2009) and *Alps* (2011).

Directed by Tsangari and co-written by her and Efthymis Filippou, *Chevalier* is a maritime male-only huis-clos that takes place on a luxury yacht sailing in the middle of the Aegean Sea in winter. Six men returning from a fishing trip decide to play quite a strange game called "Chevalier." There are no particular rules for the game and the contestants are all characterized by the same arbitrariness. There is only one goal: determining who is "the best in general," and one prize: a signet ring for the winner (the ring is called here "Chevalier," in reference to the French word "chevalière," also used, often transliterated, in Greek). Participants are supposed to judge and grade each other in a wide range of areas. Indeed the game involves rating each other, at any time, on how they are (their psychology, body, physical appearance, including penis size) and on how they do everything (their physical abilities including sleeping posture but also erection, or, more unexpectedly, their skills in cooking, cleaning or assembling IKEA shelves).

As suggested by the accompanying film poster which shows a ship's wheel whose handles end in penises carved out of the wood, the film seems at first sight to propose a kind of questioning of masculinity and homosocial relationships, providing "a buddy movie without the buddies" – the tagline of the film. But beyond this first dimension, if the gender issue appears to be a central concern of the film, perhaps it is not the primary one, rather it functions as a kind of allegory for the absurdity of a contemporary society obsessed by performance on the one hand and by power and power struggles in everyday life on the other hand. This indie absurdist comedy is much more surrealist than naturalist, but despite or beyond its strangeness, it takes a philosophical more than an anthropological or sociological approach.

The six men are the main characters, the Doctor (who is at the top of this micro male-only patriarchal society, an incarnation of the Father/patriarch/ *pater familias*), Yorgos, Josef, Dimitris, Yannis and Christos, and there are three crew members – a cabin boy, the Captain and the cook. The members of the sextet, all ordinary modern men – although there is a noticeable gap in terms of age, class and social status – are all related by family (brother, son-in-law, and so forth) or professional ties. Though at first friends, brothers or

colleagues, because of the game, they soon become rivals, and their rivalry also reveals jealousy and vanity, and exposes their non-heroic nature.

While there is no single female character in the cast, women are not totally missing from the plot. As characters, women are present *in absentia* because each character evokes his wife, daughter, or mother, and there are occasional phone calls and video-chats with them. If each of the characters has its specific characteristics, and does not seem to be shaped to attract the audience's sympathy, one character in particular distinguishes himself from the group from which he remains on the fringes: Dimitris, the younger man of the sextet, a round chubby guy with no profession, who still lives with his mother. He represents the loser archetype and simultaneously he is stuck in endless childhood, not trying to be a man but obviously remaining a boy: he plays the Rubik's cube perfectly, he is afraid to sleep alone in his cabin, he collects pebbles and looks for the perfect spherical one, he avoids the water, and he is afraid of diving. In a word, he seems unable to take part in the activities of the group, but he does not feel any particular uneasiness or shame about his difference, assuming according to their values the mantle of an anti-hero.

4. Masculinity and the Female Gaze: Gender-based Essentialist Readings

The dominant Anglophone reviews and readings of *Chevalier* have stressed a gender-based hermeneutics of the film. This probably happened, first, because of the apparently obvious subject of the film, identified as "men and masculinity"; secondly, because of the sex of the director (a woman who wrote and directed an all-male cast film), and thirdly, due to the association of those two components being conceived as surprising and antithetical. Perhaps, if we take into account "the horizon of expectation," the genre of the film is also coming into play, because buddy movies are generally sensitive to issues of gender.

The first aspect of gender-based essentialist readings concerns the representation of masculinity mostly interpreted as monolithic whereas it seems that the film rather involves multiple masculinities. A second aspect concerns the fact that the film is mainly interpreted as a critique of this unique masculinity, because directed by a woman.

4.1. Multiple masculinities

Drawing data from the reviews of *Chevalier*, it appears that a majority of film critics analyzed the film unproblematically as a critical take on contemporary masculinity:

> […] the film is in fact a searing satire of failing masculinity […]. (Al-Kadhi, 2016)
>
> […] critique of masculinity […]. (Kukla, 2016)
>
> […] *Chevalier* is a delightful poke in the eye of masculinity and male rivalry. (Burke, 2016)
>
> The smartest paeans to male camaraderie acknowledge an embarrassing truth: get a group of guys together and stupid pissing matches may ensue. Blame nature or nurture, testosterone or generations of social conditioning, but the most sensitive and enlightened of dudes – the kind who has never shoved anyone into a locker or paddled a pledge or used the term 'white knight' – sometimes find their competitive streak amplified in the company of other men. Because, tough as it is to admit, even us beta males *occasionally* want to be the alpha. That's the whole point of *Chevalier*, a bone-dry Greek comedy about a group of aging friends competing in a nonstop social Olympics of their own creation. (Dowde, 2016)

The problem stems from the fact that gender-based readings seem to rely on a unified conception of "men," perceived as a whole and as a bloc, and do not explore in detail the representations and configurations of men and masculinities, reinforcing a reified and essentialist conception. In so doing, they conform to a common idea generally assumed by mass culture and described by Raewyn Connell as: "[…] a fixed, true masculinity beneath the ebb and flow of daily life. We hear of 'real men,' 'natural men,' the 'deep masculine.' This idea is now shared across an impressive spectrum" (Connell, 2005: 45). Connell's theories about gender and masculinities provide a good tool to highlight the use of masculinity in Tsangari's *Chevalier* and my analysis refers to it.

An exploration of the multiple representations of men and masculinities in this film is important to evaluate how and if they fit to or exceed "hegemonic masculinity" (Connell, 2005: 45). According to Connell, "The fundamental feature of the concept remains the combination of the plurality of masculinities and the hierarchy of masculinities' and it "presumes the subordination of non-hegemonic masculinities" (Connell & Messerschmidt, 2005: 45). In *Chevalier*, none of the characters is an incarnation of hegemonic masculinity (the dominant form of masculinity within the gender hierarchy, or to an ideal of masculinity), but rather they all perform diverse masculinities, which are not perceived as fixed identity or fixed types, but as a strategy. Indeed, apart from "hegemonic masculinity," Connell established a kind of typology where she distinguished diverse forms of masculinities: complicit, marginalized and subordinate.

In *Chevalier*, all men are driven by the ideal of "hegemonic masculinity," even if they all fail in every attempt to be "the best in general," and they only exemplify a masquerade[1] of "hegemonic masculinity," in a variety of ways. Behind their common desires and aspirations, all the characters are diverse in terms of age, class (although they broadly belong to the upper middle class), status, appearance, and personality. At the end of the film, even the yacht crew, attracted or infected by the game, start to take in the competition and begin a new round. That is to say that all the male characters are willing to fit with what they think they are supposed to be, to the idea of what a "man" is supposed to be like, and they replay over and over the struggle of hierarchy, in the framework of the game.

The film focuses on their failures, insecurities and anxieties. But, as mentioned above, there is one exception, one character who stands out: Dimitris, who may embody an avatar of "subordinate masculinity" – even if this category is primarily applied by Connell to gay men, and Dimitris is not gay and does not even correspond to the type of *homo effeminatus* (Connell, 2005: 78, 81, 181, 191). Nevertheless, he exhibits qualities that are the opposite of the values of hegemonic masculinity (which supposes courage, force, emotional restraint, competitiveness, health), such as physical weakness, fear, emotionality, or expressivity. In a word, Dimitris is a counter-example of hegemonic masculinity.

Employing Connell's concept of multiple masculinities, it is obvious that even if *Chevalier* has a male-only cast, there is no gender homogeneity in the film but rather complex characterizations of men and masculinities. Tsangari seems to deconstruct conventional masculinity perceived as natural and monolithic, and to highlight the performative nature of masculinity, its diversity and the power relations and hierarchy involved in it. Without trying to mock the men themselves, Tsangari mocks conventional masculinity codes, and the incommensurability between an ideal (the impossible desired male body) and reality. An attentive viewer of the film may note a gap between the desperate, painful and often pathetic attempts of the characters to become the alpha-male and this unattainable, impossible masculinity.

4.2. Body, sexuality, and subverted gender representations

A striking element of the film related to gender issues is the importance of body language and, at a more underlying level perhaps, of sexuality. This characteristic was also remarkable in Tsangari's previous films *Attenberg* and *The Capsule*, and even earlier, in *The Slow Business of Going*. In these films, the body language is central. The issues of flesh and animality are also prominent (Psaras, 2016: 123, 221). Meaningful bodies are emphasized by embedding a choregraphic approach and performance in the scenography.

Body and gender issues are interlinked in *Chevalier*. According to Connell's scheme of hegemonic masculinity, a modern man is supposed to embody performance, a combination of force and skills and, to go further, I could add that such a man *is* the body, he *is* the action (Connell, 2005: 54). Moreover, masculinity is constituted through notably healthy bodily performance, which is largely represented in the film by the attention paid to health and multiple practices of body building (about which only Dimitris remains recalcitrant). This compulsory bodily performance is both internal and external. For example, the characters are not supposed to smoke (but the Doctor smokes in secret), some of them exercise on rowing machines (a particularly comic practice on a boat), and the paroxysm of this compulsory healthy-bodily performance is brought out by a competition related to their possible physiological shortcomings, when they submit to a blood test, to find out who has the lowest cholesterol level.

But Tsangari goes further in her reflections on the body when she subverts representations of hegemonic masculinity and gender roles. Since physical appearance constitutes part of the competition, every player pays attention to his hair, clothes, gestures and body in general, and all of the characters discover their uneasiness related to standards of masculine beauty: for example, male pattern baldness becomes a problem and Christos – purposefully incarnated by Sakis Rouvas, the biggest pop star in Greece – is obsessed with his legs, asking his wife on a video call if she thinks his thighs are fat (a question one could identify as a "typically" female question, according to the dominant gender norms).

Tsangari also plays with other gender stereotypes and gender roles: for example, the players have to clean silverware, to explain in detail salad recipes, and to wash windows (in a parodic scene of a stereotypical sexualized car wash, commonly performed by women). It is noteworthy that through the many examples given in the film, Tsangari depicts preoccupations and anxieties, like "beauty," generally attributed and assigned to women, and she reverses and subverts some gender stereotypes.

The film also explores sexuality, virility and manhood, addressing some taboo topics. Talking about his wife's and his desire to have a child and the failure of this project, Yannis automatically blames his wife's infertility caused by her age, but the Doctor retorts that his own fertility is the problem and that he may be sterile. Virility and manliness are also challenged through a contest that consists in erect penis measuring. Every player is supposed to engage in the pursuit of a "beautiful erection," and to take a photograph in order to show the others what he is capable of, following an absurd procedure: listening to a seriously anti-erotic text beginning with the phrase "The professor of geometry was very strict." Only Joseph fails this contest and when he finally gets his erection, proud of his reaffirmed virility, he proposes,

unsuccessfully, to fuck everyone who wants to, even the Doctor. This scene provides an example of a subtle homoerotic subtext that is also noticeable in other parts of the film (for example, the scene where Dimitris, pulling down his pants, offers his buttocks during the ritual of blood exchange).

4.3. Performed masculinity and "body-reflexive practices"

As suggested at a metaphorical level by the first scene of the film, when the sextet returns from diving and literally peel off each other's wetsuits, Tsangari aims to show the characters naked, in a figurative sense. Behind the film's exploration of the dynamics of masculinity, the inscription of the body in *Chevalier* more generally expresses the performativity of gender. In *Gender Trouble*, Judith Butler exposed gender performativity as going beyond language (the primary meaning of "performativity") to include not only the way of speaking, but also behavior, gestures, and postures of everyday life (Butler, 1990). What is exposed in the film fits with this concept where all this apparatus works, through performed masculinity, to produce what is perceived by the characters as an essential masculine identity. Another concept, coined by Connell, helps shed light on the interrelation between body and gender in the film, that of "body-reflexive practices":

> [They] are not internal to the individual. They involve social relations and symbolism; they may well involve large-scale social institutions. Particular versions of masculinity are constituted in their circuits as meaningful bodies and embodied meanings. Through body-reflexive practices, more than individual lives are formed: a social world is formed. (Connell, 2005: 64; see also Connell, 2000)

According to this reading, *Chevalier* provides a reflection on the place of the body in identity issues and social power relations, and evokes in a more or less implicit way how ideology and hegemony are inscribed in body practices, illustrating Connell's analysis in which masculinity is constructed by "onto-formative body practices" that create the world we live in. But, thanks to Dimitris, the sole character who rejects hegemonic masculinity, the film leaves a possibility for alternative paths of masculinity. Through the performance of his body, he escapes the hegemonic masculinity and lends his shape and corporeal dimension to another way of being himself; the best illustration being his performance on the dock, when he lip syncs "Lovin' you" by Minnie Riperton, while introducing elements of break-dance choregraphy. His impromptu show is a hilarious mix of astonishing clownish elements and acrobatics, *beyond* hegemonic masculinity, that subvert gender codes by combining conflicting characteristics (a chubby guy's performance on the female voice of Riperton with her distinctive high-pitched voice), thus avoiding any potential caricature.

4.4. The female gaze and feminist readings

Since masculinity is perceived as the main focus of *Chevalier*, a majority of film critics concentrated their attention on the sex of the director which became a big issue. Because Tsangari is a woman, her male-only cast film was automatically described as feminine, if not feminist, and as an exemplary product of a female gaze. This is maybe the most essentialist particularizing argument applied in the case of *Chevalier*'s interpretation by the reviewers who identify the author with her work, through a metonymic process implying the idea that an art work is *de facto* the manifestation of the artist's identity. For example, in *i. D. Vice*, a British magazine dedicated to fashion, music, art and youth culture, one can read: "Tsangari subverts cinema's traditional 'male gaze' with a female led vision of male idiocies" (Al-Kadhi, 2016).

As a reminder, the term "male gaze" was coined by feminist film critic Laura Mulvey in 1975, who analyzed the way in which the visual arts depict the world and women from a masculine point of view. She uses the framework of Freudian and Lacanian psychoanalysis (analysis of the role played by the gaze in the mirror stage) in a feminist and polemic perspective. This article was one of the first to analyze how the form of films is structured by the unconscious of the patriarchal society and to define the origin and nature of the viewer's pleasure in the cinema, as well as the way in which the female figure is constructed to satisfy the voyeuristic drives of the viewer. In response to it emerged afterwards the concept of "female gaze" to refer to the perspective a female filmmaker brings to a film. In particular, through the documentary film genre, as a cinematographer, Zoe Dirse explored the female gaze, looking at "sexual difference at the point of production (not reception), and […] at 'perception' as the ground where sexual difference is played out" (Dirse, 2013: 15). Today largely discussed among feminist theorists who show the limitation of an exclusive focus on sexual difference and criticize psychoanalytic feminist film theory (Smelik, 2016), the two concepts gave rise to a lot of debates related to gaze theory, but they remain commonly used by film critics as non-problematic tropes, while from the 2000s there have been also attempts to de-gendering the gaze (Block, 2008: xix–xxix, and Part II).

My aim here is not to discuss from a theoretical point of view those examples of gaze theory but to focus on the use of the concept of the female gaze in the case of *Chevalier*. Including different points of view, notably that of the character and that of the spectator, the "female gaze" is also related to the female director's gaze and this particular meaning is generally attached to Tsangari:

> Not a single female character appears – but [*Chevalier*'s] perspective on male group psychology is implicitly, and fascinatingly, feminine. (Lodge, 2015)

> Perhaps it shouldn't be important, but watching *Chevalier* and knowing it was directed by a woman possibly enforced this critique of masculinity even more. *Chevalier* was never going to be a film triumphing aggressive hyper masculinity (*Wolf of Wall Street*, *Goodfellas* etc), but Tsangari's outsider perspective has shone a light on the intrinsic issues with masculinity in our society. In an absolutely hilarious way, of course. (Kukla, 2016)

> Eschewing the more outlandish elements of 2010's *Attenberg*, this [*Chevalier*] is a brilliantly contained and sublimely ridiculous send-up of competitive male egos from a refreshing female perspective. (Nicholson, 2015)

Moreover, some film critics (regardless of their sex!) find astonishing, paradoxical, if not weird, the fact that a woman has made a film about men and masculinity, stressing the difference between the sex of the characters/actors and that of the director, as is obvious in the following examples:

> The film ended up making some poignant points about modern masculinity – imagine the surprise when people realise it's directed by a woman! (Zhuo-Ning, 2016)

> Athina Rachel Tsangari's droll, disorienting follow-up to 'Attenberg' brings brisk female perspective to male ego wars. […] Tsangari has no interest in guiding our interpretation, running in place with her ultra-arch joke until a deft double bluff of a conclusion. Likewise, she demonstrates and encourages little empathetic preference for one character over another – the advantageous outcome, perhaps, of a female filmmaker's view on an exclusively, and aggressively, male rivalry. There's a hint of feminist relish in the way *Chevalier* depicts the kind of personal infighting and aspirational comparison more commonly attributed in popular culture to women than men. (Lodge, 2015)

> […] *Chevalier* emerges as that fascinating and seemingly paradoxical thing: a feminist film in which women are virtually absent from the screen. (Balsom, 2016)

Considering sex and gender difference as an unsurmountable gap, this kind of analysis is obviously based on a particularistic reading and conveys a binary essentialist framing. The gender question posed in *Chevalier* is not whether it is about men or women, but what creates gender homogeneity. At any rate, Tsangari seems to be trapped in a gendered reading which (mis)interprets her and her work throughout an assigned identity: she is necessarily viewed as a "woman filmmaker" and her film is necessarily interpreted as "female-gaze oriented" and feminist, on occasion.

Perhaps those general gender-based readings can find a partial explanation in some specificities that gender issues encounter in cinema. First, if gender

inequality in cinema has been a subject of central importance for researchers interested in culture and the cinema industry from the 1990s onwards, the question has been popularized in recent years, from the 2010s in particular in the public sphere, notably by the New York Film Academy report *Gender Inequality in Film* (2013). This global political context may promote gender-based readings.

Likewise, the genre of the film may play a role in the dominant gender-based readings. As noticed above, buddy movies are generally sensitive to issues of gender. According to Kuhn and Westwell's *Dictionary of Film Studies*, a buddy movie is "a film that tells the story of a close relationship between two men, often with a light-hearted tone" (Kuhn & Westwell, 2012: 49). And it appears that *Chevalier* fits better in the definition of a "bromance," defined as "a recent iteration of a buddy film […] which shows a nonsexual relationship between men" (Kuhn & Westwell, 2012: 50; DeAngelis, 2014). Because the tagline of the film is "a buddy movie without the buddies," it has been assumed that *Chevalier* was to be seen within the framework of this genre, although Tsangari seems to reinvent it, at least to play with it. But it should be remembered that, according to a feminist reading of film studies, buddy movies (i.e. exploring male friendship) were long interpreted as a response to the feminist movement throughout the 1960s and the 1970s (Bret, 2003: 73). This categorization of *Chevalier* in a specific film genre (buddy movie) and the feminist reading of it may have influenced the reception of the film in this way.

Dominant discourses of reviewers analyze the film as a critic of masculinity, described as monolithic, from a female and feminist point of view. On the contrary, *Chevalier* refers to multiple masculinities without being a diatribe against men and masculinity. Rather than feminist and feminine male-bashing, the film, profoundly non-essentialist, shows maybe the anxiety of men, and the reflection on masculinity may function as an allegory of competitiveness of modern neoliberal societies. As a conclusion about gender issues, even if it is not totally irrelevant to argue that the film explores the dynamics of masculinity in its most basic sense, *Chevalier* cannot be reduced to this dimension alone. Far from a separatist and naturalistic conception of gender, it is a film about power relations and the diktat of performance in a global neoliberal world. This is not to say that it is a gender-blind film, but gender always has to do with power relations and hierarchy. In *Chevalier*, masculinity is probably taken here as a kind of parable, that sits beyond any particularism and beyond gender dichotomy. In this way, I propose a beyond binary gender alternative interpretation of the film challenging essentialized and dichotomous definitions of sexual and gender identity.

5. Dominant National-based Readings

Besides the gender-based dominant reading of *Chevalier* identified within the Anglophone media, there is also a trend among film critics and scholars to provide national-based readings of the film which is unproblematically viewed as necessarily "Greek." This is another aspect of particularizing interpretation of the film, with some sort of orientalization being at work. This reception takes place in a widespread national-oriented understanding of culture, regnant in film studies until the 1980s. More recently, a renewal of this interpretative grid started to emerge (Crofts, 1998: 385).

One of the first scholars to discuss the concept of National Cinema was Andrew Higson who wrote an eponymous paper where he showed the problematic nature of the concept (Higson, 1989). Aiming to discuss the term, he argued that even if "national cinema" is often used to "describe simply the films produced within a particular state," it is necessary to take also into account other factors such as distribution, consumption, and critical and cultural discourse (Higson, 1989: 36). More recently, starting in the 2000s, a new trend arose in the field of film studies exploring the concepts of transnational cinema whose main purpose (among others) of refuting National Cinema, in line with the "imagined communities" argument of Benedict Anderson (1983: 5), and moving away from any Eurocentric approach (Higbee, 2010; Ezra & Rowden, 2006; Ponzanesi, 2016). Indeed, as argued by Higson:

> To some extent, then, the process of defining a national cinema, and thereby establishing some sort of unique and self-contained identity, takes meaning in the context of a conceptual play of differences and identities. And, as Benedict Anderson has argued, 'nations... cannot be imagined except in the midst of an irremediable plurality of other nations.' (Higson, 1989: 38)

My aim here is to show that the particularizing national-based readings of *Chevalier* are correlated to a still thriving representation of "national cinema" in its most narrow sense (Papadimitriou, 2011). This last part of my paper intends to analyze and dismantle some of those national-based arguments manifested in different forms – making use of various *topoi* related, i.e. to Ancient Greek heritage or to the label "Greek crisis" – and underpinned by a crypto-discourse of "otherness building" laced with anthropological representations, ethnological impulses and a neo-colonial gaze.

5.1. What is Greek about *Chevalier*?

The qualifier "Greek" seems to be inescapable and to constitute a key element in the discussion of Tsangari and of her cinematic work. It is the result of an old habit which appears innocent but has multiple (mostly negative) effects.

First, it seemingly helps to identify a cultural work or an artist, contributing to the promotion of both of them, yet, at the same time, it influences the "horizon of expectation" of the viewer, giving him/her a virtual identity interpretative grid that pushes him/her to identify or to exoticize.

Secondly, framing a film in a national way shapes the reception prescriptively rather than descriptively. As Higson argues: "[…] very often the concept of national cinema is used prescriptively rather than descriptively, citing what ought to be the national cinema, rather than describing the actual cinematic experience of popular audiences" (Higson, 1989: 37). Last, qualifying a film or an artist using a "national" label presupposes and creates an illusory homogenization.

Is such "national" categorization *really* necessary? Of *Chevalier*, one could ask "What is Greek about it?" (Tzioumakis, 2017). This apparently paradoxical or surprising question is the first of a series of key questions that can be asked when confronted with the dominant national-based reading of the film. What is the film about? Is it the vehicle of "national character"? Does it embed something characteristic of Greek culture or Greek society? To "what extent is it engaged in exploring, questioning and constructing a notion of nationhood in [the film itself] and in the consciousness of the viewer?" (Higson, 1989: 36).

As a preliminary to this discussion, it is worth noting that some film critics refer to the ancient Greek tradition in their reading of *Chevalier*, which is a significant but not surprising fact, modern Greece remaining broadly unknown for its cultural production and still in the problematic shadow of its renowned heritage. For example, we can quote two quite common uses of a mythological reference, linking the plot of the film with that of the *Odyssey*:

> Fittingly, the arena for Le Chevalier's 'games' is a boat: whilst a symbol of odyssey and male triumph in the Greek mythological tradition, in this film it travels nowhere, is left to float impotently on Greece's troubled waters. (Al-Kadhi, 2016)

> From unwittingly homoerotic moments to merciless treachery, Tsangari's men pull off the brilliant feat of being pathetically competitive and unprecedented in their brutality – one's reminded of the boasting heroes of Homeric Epic in these heavily moisturised Greek machos. (Halstead, 2016)

> *Chevalier* might well be Homer's lost epic about Odysseus and his men […]. (Baumgarten, 2016)

> From Odysseus to Oedipus, Greeks have loved their tests of masculinity; Heliodorus of Emesa wrote of the performative nature of masculinity, Achilles Tatius interrogated the traditional codes of gender, and Homer was all about testing who's best, in both the Trojan war and, even more importantly, on the journey back home.

> As with *Chevalier*, the idea of the elite masculinity of the Second Sophistic wasn't just about who can run fastest, lift the biggest weights, eat the most hotdogs. Unlike the limited maleness of modern times – the shot putter, the lothario, the bully – it's about wholeness, balance, not the fetishisation of brawn and the denigration of intellect – say, the huff and puff of Bruce Willis or the Hollywood slab of a lone cowboy astride his horse, taciturn, with nothing but contempt for book-learnin.' It's about the concept of paideia, possessing intellectual, moral, as well as physical refinement; the 'best in general.' In Chevalier – as in Alcibiades, who said 'nothing could be more important than becoming the best man he could be' – things aren't settled by an arm wrestling contest, but with sartorial discrimination, the ability to provide for a family, or how many times you brush your teeth. (Twa, 2016)

De facto, *Chevalier* and *The Odyssey* have only a few rare elements in common. *The Odyssey* plays out partly on the sea and a vessel (but also on land), and Ulysses makes his legendary journey home to Ithaca along with male companions. But the plot, the context, the characters, and even the meaning of their quest differ significantly in the film and in the epic ancient Greek poem. And who could be Ulysses in *Chevalier*? The Doctor? Even if he seems to be at the top of the hierarchy as the patriarch/pater familias, he is far from the crafty Ulysses who is an emblem of cleverness, and an example of the Greek *mètis* (Détienne & Vernant, 1974). In addition, the relationship between the characters is absolutely not comparable in the two cases. Thus, this kind of analysis is unsustainable and highlights the incapacity of some commentators to support their "national-based" argument without deploying Ancient Greek stereotypes and unsuitable references and clichés.

Returning to the initial question "What is Greek about *Chevalier*?", we could look for the "Greekness" of different parameters: that of the filmmaker, the actors, the production company, the language, the film shooting location, or even the funding of the film, or anything else. As for Tsangari, she is definitely, officially, a Greek national, a fact that cannot be concealed (she was born in Greece). But she soon moved to the US where she continued her studies and started her career in cinema, enjoying today an international acknowledgment. It would be presumptuous and surely inappropriate to discuss Tsangari's Greekness.

But what interests us more here is whether her film can/could be categorized as Greek. The shooting location is a luxury boat, cruising in the middle of the Aegean Sea in winter. Throughout the whole film, there are only few landscapes: a rocky beach, an abandoned seaside building that might be an unfinished/abandoned hotel complex, and a marina. Except for the boat, the scenery is impersonal and also characterized by a cold beauty, but it could be anywhere – we can find here the predilection of Tsangari for interchangeable

spaces. Nothing in the landscape, nor in the seascape evokes Greece, and Tsangari deliberately chose to shoot in the winter, for "the ominous grey light," but also because it was "the opposite of the cliché of what Greece is like" (Marchini Camia, 2016). What is most important about the shooting location is that it permits a closed place where the spectator may observe the characters evolving, like animals in a cage – Tsangari's films constantly play with animality interwoven with human beings (Mayer, 2015: 36).

In addition, there are almost no cultural markers in the film that could be connoted as Greek, except the language and the actors. For example, references to food relate to mainly international dishes and global recipes as the characters eat lemon cake, cheesecake or sea-food. As to other cultural, historical or societal references, there are very few Greek components, except one reference to the Greek War of Independence which is used to illustrate a mock initiation process of blood exchange between the characters to become blood brothers.

Even the film's soundtrack hardly evokes Greekness: besides rare songs performed in Greek, it is mainly a mix of classical and electronic dance music. The film was produced by Haos Film whose website is only available in English. It would be absurd to continue seeking traces of Greekness in a film that deliberately avoids such a dimension, but we may get back to the question of language before closing the discussion on the presumed Greekness of the film transforming it as a sample of national cinema. Although a Greek-language feature and performed by famous Greek actors, *Chevalier* has been largely diffused and screened on an international scale, with English subtitles, and it was premiered at the Locarno International Film Festival in 2015.

In conclusion, it is obviously difficult to argue that *Chevalier* is especially Greek. On the contrary, the film positions itself as deliberately non-Greek or beyond Greek, with no strong connection with any national-based conception, and nor does it fit into any culturalist narrative, aiming to be national-neutral.

5.2. Greek as weird and the rhetoric of "Greek crisis" as a label

As mentioned above, Tsangari is considered, along with Lanthimos, a leader of the so-called "Greek weird wave of cinema." Beyond its derogatory connotation, the problem is that this label, interwoven with the "Greek crisis" label (Fotiou & Fessas, 2017), creates an effect of homogenization, quite similar to the previous ones analyzed in this paper, gender-based and national-based readings (Basea, 2016; Mademli, 2016). Even though the filmmakers themselves may not recognize it, and even if no precise corpus has ever been circumscribed to define it, this label has the effect of suggesting that all those "weird Greek movies" share a collective identity.

Furthermore, stressing the alleged links between cultural works and a political, economic and social context, such a label functions as an essen-

tialist tool, and provides an interpretation based on culturalist stereotypes unsuitable to the adequate exploration of the aesthetic, philosophical, and political (in the broadest sense of the term) frames of the film (Papadimitriou, 2017: 181). In the case of *Chevalier*, the "weird" label is applied in a reductive discourse of otherness building, viewing Tsangari's cinematic work as an indigenous native cinema and as a part of a whole, rather than a personal creation.

As an ironic or cynical mechanism, this label imbricated with the argument of the Greek crisis has attracted and reinforced international attention and interest in the so-called "Greek weird wave." The journalists, film critics, and scholars who have used the term systematically correlate the emergence of the "Greek weird wave" with the financial crisis, and the films involved in this category were analyzed and conceptualized with regard to the economic and social situation in Greece (Psaras, 2016).

It has been argued that *Chevalier* is about the Greek economic crisis and many reviews develop that interpretation:

> Though Tsangari is loath to describe herself as a political filmmaker, one can't escape the feeling while watching Chevalier that her film is a response to the chaos that has overtaken post-recession Greece, and the forces which precipitated this crash. […] As with so many Greek Weird Wave films, there is a steadfast refusal to make sense; for all its symbolic resonance, Tsangari would never stoop to being didactic. The film is, perversely, a more powerful statement on the cruel, ruinous logic that rules the world, and the rage felt by Greece's dispossessed, for its willfully awkward energy. The Greek Weird Wave sensibility seems increasingly to speak to a spreading sense of ennui and anomie, and Chevalier could well be the final major work before it goes global. (Palmer, 2016)

> As Tsangari provides laughs and uncomfortable observations about manhood, she also works in an underlying commentary on class and Greece's financial crisis. (Fopp, 2016)

> Bolstered by an underlying allegory about the financial crisis, the film is abstract to the point of absurdity […]. (Harkness, 2016)

> In 2000, Claire Denis made *Beau Travail*, a heart-rendingly beautiful film on men and their impossible quest for male perfection. […] In *Chevalier*, director Athina Rachel Tsangari somehow explores the same theme of struggle in the midst of financial crisis and political unrest through a playful game that helps six friends to determine 'the best in general.' (Huttner, 2016)

But, as noted by Lydia Papadimitriou and demonstrated by Maria Chalkou about *Dogtooth* (Lanthimos, 2009), it is important to emphasize that not all the Greek films labeled weird can be connected to the advent of the Greek

crisis (Papadimitriou, 2014; Lykidis, 2015). In any case, the use of the "weird" label uses the same mechanism of otherness-building as the national and gender based arguments. Some artists consider the "Greek crisis" as a label. For example, a collective of artists called "Depression Era," formed in 2011, has emerged on the Athenian artistic scene with the aim of reimagining contemporary Greece. They explain their "mission" is to "document [their] own downfall rather than someone else doing it for [them], in this colonialist-style 'crisis supermarket' the country has turned into" (Nicolacopoulou, 2016).

On the side of the critics who see *Chevalier* and other "Greek weird" films as a product of the Greek crisis, they follow a kind of neo-colonialist approach, assigning by default a compulsory, fixed and reductive identity to everything coming out of Greece. In so doing, and through the labeling "Greek weird wave," they use a crypto-neo-colonial gaze that recalls Herzfeld's "crypto-colonialism" (Herzfeld, 2002; Herzfeld, 2013; Herzfeld, 2016a; Herzfeld, 2016b). These commentators seem unable to escape a range of stereotypes about Greece when reading *Chevalier*, using references to antiquity, as if modern Greece could not exist, or exploiting the crisis argument, as if modern Greece could not be anything else but a crisis-stricken country.

6. Conclusion

Whether dominant reviews and readings of the film, mainly in the Anglophone popular press, refer to ethnicity, gender or to the Greek crisis, the identity assignment process analyzed in this paper shares a problematic posture of *a priori* interpretation that includes and reinforces an otherness-building discourse. In addition, the question of particularizing readings discussed in this paper relating to the case study of Tsangari's *Chevalier* encapsulates power dynamics revealing a multilayered process of otherness building and a minorization process.

The problem stems from the gap between those particularizing readings (i.e. the tendency of many film critics and journalists to analyze *Chevalier* through the narrow prism of ethnic and gender stereotypes), and the conclusions of a textual analysis of the film. *Chevalier* resists and escapes any kind of categorization, exploring wider themes that go beyond Greece, gender and the economic crisis, applying, on the contrary, to many competence-obsessed modern societies.

In *Chevalier* and through her cinematic works in general, Tsangari seems to oppose to those stereotypical readings and horizons of expectation a vision of hybridity (Mademli, 2017; Poupou, 2014), as she is planning two English-language feature films. The first one is *Duncharon*, written with Matt Johnson, described on the Haos film website as "an ambitious science-fiction comedy about dysfunctional astronauts marooned on the moon of

Pluto," which was awarded the ARTE France Cinema Award as the "Best Project of Cinemart 2012" at the Rotterdam International Film Festival. And the second one is *White Knuckles*, a film Tsangari announced as "an action-noir-comedy," "a screwball, neo-noir, caper, action film […] about petty criminals" in which "the head criminal is a woman" who also becomes "'against herself' like an action hero" (Erbland, 2016). It is certain that, as announced, those two next features will not be easily categorized and will challenge the notion of hybridity.

Author Contributions
The author confirms being the sole contributor of this work and approved it for publication.

Conflict of Interest Statement
The author declares that the research was conducted in the absence of any commercial or financial relationships that could be construed as a potential conflict of interest.

Acknowledgments
I wish to thank Professor Gregory B. Lee and Professor Christopher Jon Delogu (Institute of Transtextual and Transcultural Studies, Jean Moulin University Lyon 3) for their careful proofreading of this paper and for their helpful comments.

NOTE

1. The term "masquerade" was originally used by Joan Riviere (1929) in the context of femininity. Most recently, it has been also used in the context of masculinity: see Perchuk, A., & Posner, H. (eds.) (1995). *The Masculine Masquerade: Masculinity and Representation*. Cambridge, MA: MIT Press.

REFERENCES

Al-Kadhi, A. (2016). "The Crisis of Masculinity in Contemporary Cinema," *i. D. Vice*, November 16. Retrieved from https://i-d.vice.com/en_gb/article/the-crisis-of-masculinity-in-contemporary-cinema (accessed: June 4, 2018).

Anderson, B. (1983). *Imagined Communities: Reflection on the Origin and Spread of Nationalism*. London: Verso.

Balsom, E. (2016). "*Chevalier*," reviewed in *Sight and Sound. The International Film Magazine*, August: 15.

Basea, E. (2016). "The 'Greek Crisis' through the Cinematic and Photographic Lens: From 'Weirdness' and Decay to Social Protest and Civic Responsibility," *Visual Anthropology Review* 32(1): 61–72. doi:10.1111/var.12093

Baumgarten, M. (2016). "*Chevalier*, Film Review," *Austin Chronicle*, June 17. Retrieved from https://www.austinchronicle.com/events/film/2016-06-17/chevalier/ (accessed: June 15, 2018)

Block, M. (2008). *Situating the Feminist Gaze and Spectatorship in Postwar Cinema*. Newcastle upon Tyne: Cambridge Scholars Publishing.
Bret, C. E. (ed.) (2003). *American Masculinities: A Historical Encyclopedia*. Thousand Oaks, CA: Sage Publications.
Burke, G. (2016). "Review," *Entertainment*. Retrieved from http://entertainment.ie/movie-review/Chevalier/382982.htm (accessed: June 11, 2018).
Butler, J. (1990). *Gender Trouble: Feminism and the Subversion of Identity*. New York: Routledge.
Calotychos, V. (2003). *Modern Greece: A Cultural Poetics*. Oxford: Berg.
Calotychos, V. (2013). *The Balkan Prospect: Identity, Culture, and Politics in Greece after 1989*. New York: Palgrave.
Calotychos, V., Papadimitriou, L., & Tzioumakis, Y. (2016). "On Solidarity, Collaboration and Independence: Athina Rachel Tsangari Discusses Her Films and Greek Cinema with Vangelis Calotychos, Lydia Papadimitriou and Yannis Tzioumakis," *Journal of Greek Media & Culture* 2(2). doi:10.1386/jgmc.2.2.237_7
Chalkou, M. (2012). "A New Cinema of 'Emancipation': Tendencies of Independence in Greek Cinema of the 2000s," *Interactions: Studies in Communication & Culture* 3(2): 243–261. doi:10.1386/iscc.3.2.243_1
Connell, R. (2000). *The Men and the Boys*. St Leonards: Allen & Unwin.
Connell, R. (2005). *Masculinities*. 2nd edn. Cambridge: Polity Press.
Connell, R., & Messerschmidt, J. W. (2005). "Hegemonic Masculinity. Rethinking the Concept," *Gender and Society* 19(6): 829–859. doi: 10.1177/0891243205278639
Crofts, S. (1998). "Concepts of National Cinema," *Oxford Guide to Film Studies*. Oxford: Oxford University Press, 385–394.
DeAngelis, M. (ed.) (2014). *Reading the Bromance: Homosocial Relationships in Film and Television*. Detroit, MI: Wayne State University Press.
Détienne, M., & Vernant J.-P. (1974). *Les ruses de l'intelligence: La mètis des Grecs*. Paris: Flammarion.
Dirse, Z. (2013). "Gender in Cinematography: Female Gaze (Eye) behind the Camera," *Journal of Research in Gender Studies* 3(1): 15–29.
Dowde, A. (2016). "Chevalier Sees Male Bonding as a (Literal) Dick-measuring Contest," *A.V. Film*. Retrieved from https://film.avclub.com/chevalier-sees-male-bonding-as-a-literal-dick-measuri-1798187907 (accessed: June 11, 2018).
Erbland, K. (2016). "How *Chevalier* Director Athina Rachel Tsangari Inspired Indie Legends like Richard Linklater & Jay Duplass," *Indiewire*, May 26. Retrieved from http://www.indiewire.com/2016/05/how-chevalier-director-athina-rachel-tsangari-inspired-indie-legends-like-richard-linklater-jay-duplass-288741/ (accessed: June 4, 2018)
Ezra, E., & Rowden, T. (eds.) (2006). *Transnational Cinema: The Film Reader*. New York: Routledge.
Fopp (2016). "*Chevalier* Review." Retrieved from http://www.fopp.com/chevalier/ (accessed: June 4, 2018).
Fotiou, M., & Fessas, N. (2017). "Greek Neo-noir: Reflecting a Narrative of Crisis," *FILMICON: Journal of Greek Film Studies* 4: 110–137.
Hall, S. (1989). "Cultural Identity and Cinematic Representation," *Framework: The Journal of Cinema and Media* 36: 68–81.

Hall, S. (2001). "Encoding/Decoding," in During, S. (ed.), *The Cultural Studies Reader*. London and New York: Routledge, 507–517.
Halstead, I. (2016). "*Chevalier* Film Review," *CultureWhisper*. Retrieved from https://www.culturewhisper.com/r/cinema/chevalier_film_review/5883 (accessed: June 4, 2018).
Harkness, A. (2016). "*Chevalier* Film Review," *The Scotsman*. Retrieved from https://www.scotsman.com/lifestyle/culture/film/film-review-the-bfg-star-trek-beyond-chevalier-1-4185261 (accessed: June 13, 2018).
Herzfeld, M. (2002). "The Absence Presence: Discourses of Crypto-Colonialism", *The South Atlantic Quarterly* 101(4): 899–926. doi: 10.1215/00382876-101-4-899
Herzfeld, M. (2013). "The European Crisis and Cultural Intimacy," *Studies in Ethnicity and Nationalism* 13(3): 491–497.
Herzfeld, M. (2016a). "The Hypocrisy of European Moralism: Greece and the Politics of Cultural Aggression – Part 1," *Anthropology Today* 32(1): 10–13.
Herzfeld, M. (2016b). "The Hypocrisy of European Moralism: Greece and the Politics of Cultural Aggression – Part 2," *Anthropology Today* 32(2): 10–13.
Higbee, W., & Song Hwee, L. (2010). "Concepts of Transnational Cinema: Towards a Critical Transnationalism in Film Studies," *Transnational Cinemas* 1(1): 7–21. doi:10.1386/trac.1.1.7/1
Higson, A. (1989). "The Concept of National Cinema," *Screen* 30(4): 36–47. doi:10.1093/screen/30.4.36
Huttner, J. L. (2016). "*Chevalier* Film Review," *The Hot Pink Pen*. Retrieved from http://ff2media.com/thehotpinkpen/2016/05/25/chevalier/ (accessed: June 13, 2018).
Kazakopoulou, T., & Fotiou, M. (2017). *Contemporary Greek Film Cultures from 1990 to the Present*. Bern: Peter Lang.
Kuhn, A., & Westwell, G. (2012). *Dictionary of Film Studies*. Oxford: Oxford University Press.
Kukla, B. (2016). "Chevalier: An Absurdist Take on Modern Masculinity," *Film Inquiry*. Retrieved from http://www.filminquiry.com/chevalier-2015-review/ (accessed: June 11, 2018).
Lodge, G. (2015). "Locarno Film Review: *Chevalier*." Retrieved from http://variety.com/2015/film/festivals/locarno-film-review-chevalier-1201567472/ (accessed: June 4, 2018).
Lykidis, A. (2015). "Crisis of Sovereignty in Recent Greek Cinema," *Journal of Greek Media & Culture* 1(1): 9–27.
Mademli, G. (2016). "From the Crisis of Cinema to the Cinema of Crisis: A 'Weird' Label for Contemporary Greek Cinema," *Frames Cinema Journal* 9. Retrieved from http://framescinemajournal.com/article/from-the-crisis-of-cinema-to-the-cinema-of-crisis-a-weird-label-for-contemporary-greek-cinema/ (accessed: June 6, 2018).
Mademli, G. (2017). "Inside the Capsule of Artistic Practices: Wearing and Performing the Moving Image," *Comunicazioni Sociali (CS): Journal of Media, Performing Arts and Cultural Studies* 1: 53–60. doi:10.1400/251261
Marchini Camia, G. (2016). "An Interview of Athina Tsangari," *Bomb Magazine*, May 27. Retrieved from http://bombmagazine.org/article/3242525/athina-rachel-tsangari (accessed: June 4, 2018).

Mayer, S. (2015). *Political Animals: The New Feminist Cinema*. London: I. B. Tauris.
Metzidakis, S. (2014). "No Bones to Pick with Lanthimos's Film *Dogtooth*," *Journal of Modern Greek Studies* 32(2): 367–392.
Mulvey, L. (1975). "Visual Pleasure and Narrative Cinema," *Screen* 16(3): 6–18. doi:10.1093/screen/16.3.6
Nayman, A. (2010). "Suicide Girl: Athina Rachel Tsangari. An Interview of Athina Tsangari," *Cinema Scope*, December 28. Retrieved from http://cinema-scope.com/wordpress/web-archive-2/issue-45/interviews-suicide-girl-athina-rachel-tsangari-attenberg/ (accessed: June 4, 2018).
Nayman, A. (2016). "Funny Games," *Sight and Sound. The International Film Magazine* 26(August): 32–34.
Needham, G. (2011). "Greek Cinema without Greece. Investigating Alternative Formations," in Papadimitriou, L. and Tzioumakis, Y. (eds.), *Greek Cinema: Texts, Histories, Identities*. Bristol & Chicago, IL: Intellect, 205–218.
Nicholson, B. (2015). "Toronto 2015: *Chevalier* Review," *Cinevue*. Retrieved from https://cine-vue.com/2015/09/toronto-2015-chevalier-review.html (accessed: June 12, 2018).
Nicolacopoulou, M. (2016). "A Collective of Artists Reimagines Contemporary Greece," *Aperture* 225: 19–20.
Palmer, D. (2016). "Review: Athina Rachel Tsangari's *Chevalier*," *The State of the Arts Film, TV & Tech*. Retrieved from http://www.thestateofthearts.co.uk/features/review-chevalier-directed-athina-rachel-tsangari/ (accessed: June 12, 2018).
Papadimitriou, L. (2011). "The National and the Transnational in Contemporary Greek Cinema," *New Review of Film and Television Studies* 9(4): 493–512. doi:10.1080/17400309.2011.606535
Papadimitriou, L. (2014). "Locating Contemporary Greek Film Cultures: Past, Present, Future and the Crisis," *FILMICON: Journal of Greek Film Studies* 2: 1–19.
Papadimitriou, L. (2016). "Revisiting Contemporary Greek Film Cultures: Weird Wave and beyond," *Journal of Greek Media & Culture* 2: 127–131. doi:10.1386/jgmc.2.2.127_7
Papadimitriou, L. (2017). "Cinema at the Edges of the European Union: New Dynamics in the South and the East," in Stone, R., Cooke, P., Dennison, S., & Marlow-Mann, A. (eds.), *The Routledge Companion to World Cinema*. London: Routledge, 181–191.
Perchuk, A., & Posner, H. (eds.) (1995). *The Masculine Masquerade: Masculinity and Representation*. Cambridge, MA: MIT Press.
Ponzanesi, S. (2016). "Postcolonial and Transnational Approaches to Film and Feminism," in Lené Hole, K., Jelaa, D., Kaplan, E. A., & Petro, P. (eds), *The Routledge Companion to Cinema and Gender*. London: Routledge, 25–35.
Poupou, A. (2014). "Going Backwards, Moving Forwards: The Return of Modernism in the Work of Athina Rachel Tsangari," *FILMICON: Journal of Greek Film Studies* 2: 45–70.
Prysthon, A. (2016). "Stuart Hall, Film Studies and the Cinema," *MATRIZes* 10(3): 77–88.
Psaras, M. (2016). *The Queer Greek Weird Wave. Ethics, Politics and the Crisis of Meaning*. Basingstoke: Palgrave Macmillan.

Riviere, J. (1929). “Womanliness as a Masquerade,” *The International Journal of Psychoanalysis* 10: 303–313.

Rose, S. (2011). “Attenberg, Dogtooth and the Weird Wave of Greek Cinema,” *The Guardian*, August 27. Retrieved from http://www.theguardian.com/film/2011/aug/27/attenberg-dogtooth-greece-cinema (accessed: June 4, 2018).

Smelik, A. (2016). “Feminist Film Theory,” *Encyclopedia of Gender and Sexuality Studies*. Hoboken, NJ: John Wiley & Sons.

Staiger, J. (1992). “Film, Reception, and Cultural Studies,” *The Centennial Review* 36(1): 89–104.

Tzioumakis, T. (2017). “What Makes a Film Greek: Inward Investment, Outward Aspirations, and the Case of Jules Dassin’s *Pote tin Kyriaki* (*Never on Sunday*, 1960),” *Film History: An International Journal* 29(2): 1–31. doi:10.2979/film-history.29.2.01

Twa, G. (2016). “*Chevalier* Film Review,” *Pure Movies*, August. Retrieved from https://www.puremovies.co.uk/reviews/chevalier/ (accessed: June 4, 2018)

Zhuo-Ning, S. (2016). “Irrelevant Winnings: Athina Rachel Tsangari,” *Exberliner*, April 19. Retrieved from http://www.exberliner.com/culture/film/athina-rachel-tsangari-chevalier-interview/ (accessed: June 4, 2018).

Addleton Academic Publishers

Journal of Research in Gender Studies 8(2), 2018
pp. 166–197, ISSN 2164-0262, eISSN 2378-3524 doi:10.22381/JRGS82201810

GENDER STUDIES IN COMMUNICATION RESEARCH: A LONGITUDINAL ANALYSIS OF SCIENTIFIC PAPERS PUBLISHED IN SPANISH JOURNALS INDEXED IN THE JOURNAL CITATION REPORTS (JCR) AND THE SCIMAGO JOURNAL RANK (SJR) (1988–2017)

BELÉN ZURBANO-BERENGUER
bzurbano@us.es
Faculty of Communication,
The University of Seville
(corresponding author)
LORENA CANO-ORÓN
Department of Language Theory
and Communication Sciences,
The University of Valencia
IRENE LIBERIA VAYÁ
Faculty of Communication,
The University of Seville

ABSTRACT. This paper describes the evolution of gender-related research in indexed communication journals in Spain, on the basis of a comprehensive analysis of all those papers relating to gender studies that were published between 1988 and 2017. Specifically, it analyses the scientific production of Spanish journals indexed in the "communication" category of the Journal Citation Reports (JCR) and the SCImago Journal Rank (SJR), in which the presence and development of works relating to gender and women's studies have been assessed. The study time frame covers a period from 1988, when the first journal appeared, to 2017, with a set of 8,300 papers. The results highlight the following: 1. Gender studies are thin on the ground in Spanish communication journals; 2. The majority of these studies were conducted by one author and when more than one was involved, the co-authors were normally Spanish; 3. Most of the studies were performed by women; 4. Mainly qualitative methodologies were employed; and 5. Thematically speaking, they focused on the study of identities and stereotypes. Notwithstanding the gradual increase in the number of studies of this type, considering the far-reaching legislative changes and the social progress in gender and equality that have occurred over the past 15 years in Spain, the results pose a potential contradiction between the social, political, and

academic interest that gender issues currently awaken and their underrepresentation in Spanish communication journals.

Keywords: social communication; gender studies; feminism; academic journals; scientific research; Spain

How to cite: Zurbano-Berenguer, Belén, Lorena Cano-Orón, and Irene Liberia Vayá (2018). "Gender Studies in Communication Research: A Longitudinal Analysis of Scientific Papers Published in Spanish Journals Indexed in the Journal Citation Reports (JCR) and the SCImago Journal Rank (SJR) (1988–2017)," *Journal of Research in Gender Studies* 8(2): 166–197.

Received 2 May 2018 • Received in revised form 24 July 2018
Accepted 2 August 2018 • Available online 25 August 2018

1. Introduction

The research field of gender studies has grown over time to become a specific subject in some university programs in several countries, such as India (Nagalia, 2018), Spain (Verge & Cabruja, 2017), Sweden (Söderlund & Madison, 2015), and the Netherlands (Pavlidou, 2011), among others. Specifically, in Spain, despite not having a research unit offering institutional support and funding for this specific discipline, as is the case in other countries, i.e. some in Northern Europe (Lombardo, 2016; Söderlund & Madison, 2015), there has been a clear increase in scientific and academic research pertaining to gender over the past few years. At the same time, from a structural perspective, equality plans have been implemented at Spanish universities in order to eliminate the gender gap and promote the participation of women in the scientific field. Notwithstanding this, there is still much work to be done in order to eradicate gender inequalities in the academic sphere (Pastor Gosalbez & Acosta Sarmiento, 2016).

Turning to the research issues that are the primary focus of this paper, in such diverse disciplines as medicine, sociology, psychology, history and education, to name but a few, the so-called "gender and women's studies"[1] have gradually come to the fore in scientific research, contributing new approaches, objects of study and methodologies. Communication as a field of study has followed the same trend, as can be seen in the number of works published in recent decades about cyberspace as a symbolic site of social and feminist debate (Rodríguez-Darias & Aguilera-Avila, 2017; Weber, 2014; Reader, 2012) or focusing on communication as a tool for the eradication of gender violence (Luengo, 2018; Rodríguez-Pérez & Gutiérrez, 2017; Lindsay-Brisbin, Deprince & Welton-Mitchell, 2014; Wozniak & McCloskey, 2010; Carlyle, Slater & Chakroff, 2008), among many other examples.

At an international level, the first study of the state of the research in the fields of communication and gender studies which we have been able to find

dates from 1983, shortly after high-quality journals had started to publish papers on women's studies. At that time, these kinds of works usually covered the following topics: a) Historical treatment of women; b) Sex differences; c) Images of women in the media; d) Education and pedagogy; and e) Surveys and integrated works. Their authors called for the need to perform more discourse analyses, as well as more studies of women's movements; they also speculated about "those women heretofore neglected in […] journals" (Foss & Foss, 1983: 200). More recently, a number of interesting studies have been conducted in France, where Julliard (2016) argues that communication and gender studies mostly adopt a semiotic approach, analyzing the media construction of gender. However, even though gender studies were not so popular there before the turn of the century, more interdisciplinary research approaches have emerged since then, including those specifically focusing on the role of the media (Biscarrat, 2015). Furthermore, having analyzed the works addressing gender studies within the field of communication in France and Latin America, Hernández Orellana (2018) argues that despite representing very different sociopolitical contexts and research traditions, research on gender and the Internet is on the increase in both areas. The Latin American case, for its part, stands out because of the interest of researchers in studying the media agenda on feminism.

In Spain, feminist approaches have gradually made inroads in the field of communication – as with others such as sociology (DiFrancesco & Ochoa, 2017) and psychology (Gartzia & Lopez-Zafra, 2014). Therefore, our aim here is to use scientific production to gauge the evolution of gender and women's studies in this field. To this end, and on the basis of previous works using biometric and meta-analytical approaches to communication in a broad sense, we will focus on gender and communication studies in order to analyze academic production in this respect in Spanish communication journals.

It should also be noted that Spain has been a pioneer in equality laws. So, besides offering a general overview of communication and gender research in the Spanish context, the importance of our study lies precisely in the comparison between the political commitment to eradicate gender inequality and how this has been reciprocated in academic production. Another of our aims is to replicate the study in other countries in order to plot a descriptive-comparative global map.

Our study has resulted from the need to evaluate the track record of gender studies in the field of communication in Spain over the past few decades – what is studied, who researches, which techniques and methodologies are employed, etc. – for the purpose of assessing the presence, evolution and characteristics of an increasingly more relevant area of scientific interest in communication research.

> The interest in determining the state of the research in any field of scientific knowledge should be taken as an indicator of its maturity. Even more so, when that effort is not limited to a mere description of what is being done, but proposes a critical evaluation to determine in some way the quality of what is being done. (Martínez Nicolás & Saperas Lapiedra, 2011)

2. Objectives

The objectives are as follows:

1. To quantify the number of papers dedicated to women's and gender studies in the top Spanish communication journals, specifically those indexed in JCR and SJR, the two most important rankings employed to measure journal quality and impact.
2. To assess the gender biases that may exist in current communication and gender research in the Spanish scientific journals under study.
3. To identify the main methodological aspects of communication and gender research in Spain.
4. To assess the international collaboration and adaptation to foreign languages of communication and gender research in Spain.

3. Hypothesis

In line with the approaches proposed by Reigada Olaizola and Sánchez Leyva (2007), the principal aim of this work, which is based on the assumption that gender studies are still being sidelined in Spanish communication research, is to provide fresh data and observations in this regard.

4. Literature Review

4.1. PhD dissertations

When trying to gauge the importance of a discipline or a field of study, there is clear evidence that doctoral programs and dissertations have definitively contributed to the production of new knowledge in that field (Kitch & Fonow, 2012: 99). In this regard, according to the most exhaustive studies performed to date, 624 PhD theses relating to gender and women's studies were defended in Spain from 1975 to 2005[2] (De Torres Ramírez & Torres Salinas, 2007, 2005). This is solely an estimate owing to the fact that the searches were mostly performed in the automated repertory TESEO which, despite being "the most reliable and comprehensive currently available" (De Torres Ramírez & Torres Salinas, 2007: 13), does not contain exhaustive data – some of which are erroneous or, at best, incomplete – on indexed PhD

theses. Notwithstanding this, the figure provided by De Torres Ramírez and Torres Salinas can be regarded as representative of the total number of theses on gender studies defended in Spain until 2005, insofar as it is the result of applying a rigorous methodology[3] based on a complex search algorithm, further supplemented by new searches and a thorough examination of the provisional results.

Although the research area called "women's studies" does not have a long tradition in Spain, it can be argued that it constitutes a well-established field of knowledge that is steadily gaining ground, as reflected in the data provided by the aforementioned studies: the average increase in PhD theses on gender and women's studies is 0.914, a "practically exponential growth" (De Torres Ramírez & Torres Salinas, 2007: 17), since compared with the 17 defended between 1976 and 1985, there were 73 dissertations only in 2004.

When the same research algorithm, as the one employed by De Torres Ramírez and Torres Salinas,[4] is applied when searching for theses defended between the academic years 2005–2006 and 2017–2018, with the aim of supplementing the data until the present day, Teseo yields a total of 234 results. However, it would be absolutely essential to conduct a comprehensive review, such as those performed in the reference works, in order to discard theses that are invalid for any number of reasons.[5]

As for PhD theses on communication from a general perspective, Jones et al. (2000) published an in-depth study spanning the years 1926–1998. Using a bibliometric approach, the authors provide information on 1550 PhD dissertations focusing on communication in Spain. Some of the elements and perspectives researched in this work have also been applied to later studies: for instance, sex disaggregation of author data or universities where doctoral theses have been defended (Caffarel, Ortega & Gaitán, 2018; Caffarel-Serra, Ortega-Mohedano & Gaitán-Moya, 2017). Besides, other bibliometric studies focusing on more specific areas within the field of communication have been conducted over the past years (Castillo & Xifra, 2006; Repiso, Delgado-López-Cózar & Torres-Salinas, 2011a; Repiso, Delgado-López-Cózar & Torres-Salinas, 2011b), as well as more comprehensive ones analyzing the general situation of PhD theses in Spain (Sanz-Casado, 2018; Blázquez, 2015; Fuentes Pujol & Arguimbau Vivó, 2010). Generally speaking, these works with a broader perspective point to a huge increase in the number of doctoral dissertations defended at Spanish universities – increasing by 180.03% between 2007 and 2016 (Sanz-Casado, 2018: 37) – in which the thematic area of "social and legal sciences" (which includes the field of communication) comes in a meritorious second place, representing 22.5% of the total number of PhD theses defended between 1997 and 2008 (Fuentes-Pujol & Aguimbau-Vivó, 2010: 68).

Returning to gender and women's studies, noting yet again the difficulties that arise when attempting to gather rigorous and reliable data on PhD theses

– and, more generally, on scientific production – relating to this field of knowledge in Spain,[6] we confirm that there is an urgent need to introduce a specific field for this topic in the TESEO classification system.[7] Besides, this is not only a Spanish problem but also needs to be dealt with at an international level: the European repertory "DART" – containing more than 766,000 open access research theses from 613 universities in 28 European countries – and the Latin American website "Portal de Tesis Latinoamericanas" – providing access to electronic PhD theses available in full text from several Latin American countries – encounter similar difficulties in providing accurate data on dissertations relating to women's, gender and feminist studies.

This classification problem also affects other reputed scientific databases, like Scopus or Web of Science, because as Söderlund & Madison (2015) have remarked:

> […] there is no established or well-defined way to categorize gender studies from other disciplines. The Scopus database, for instance, provides no way of performing a general search for gender or women's studies. Thomson's Web of Science has a research area called 'Women's studies,' but it seems not to discriminate gender studies well, since for example journals dedicated to women's health from a medical perspective are also included. (1351)

From a more general point of view, for Kitch (2003) the exclusion of women's studies from the world of research is due to several factors: for instance, the disjuncture between women's studies and research on women and gender, as reflected in the weekly listing of new books in the *Chronicle of Higher Education*:

> Although that feature does sometimes contain a category called 'women's studies,' most often, new scholarship about women or gender is parceled out to categories such as 'political science,' 'religion,' or 'sociology,' even if the research behind the books is arguably interdisciplinary. […] Another sign of women's studies' exclusion from the world of research is its absence as a category in lists of prospective grants or fundable projects by most foundations or agencies. (Kitch, 2003: 435)

As Kwasnik has stated, classifications are always created in a specific sociopolitical context that involves a hierarchy and, for that matter, the organization of concepts defines a concrete worldview that contributes to shape the minds of the people who consult such classifications (Kwasnik, in Muñoz, 2004: 48). Above and beyond the influence that classifications may have on the way people think, and given the growing interest in gender studies (Ortiz Gómez, 2004, 1999; Ballarín Domingo, Gallego Méndez & Martínez Benlloch, 1995),

this paper stresses the need to standardize specialized repositories in order to facilitate full and direct access to the studies that have been performed in Spain (and beyond) in a wide range of disciplines – multidisciplinarity is one of the most defining characteristics of this field of knowledge (Hawkesworth, 2011) – since the introduction of women's studies in university curricula at the end of the 1970s.

4.2. Research production

The greater attention now paid by researchers to gender studies is reflected not only in the growing number of PhD theses defended in this field, but also in other data as significant for academic production as the following:

1. The gradual appearance in Spain of journals and platforms specializing in these topics: *Feminismo/s*, published by the University of Alicante since 2003; *Cuestiones de Género: de la igualdad y la diferencia*, first published in 2005 by the University of Leon; *DUODA. Estudios de la Diferencia Sexual*, one of the pioneering journals published by the University of Barcelona since 1990; and *Asparkía: investigación feminista*, created by the Jaume I University in Castellon in 1998, among many others.

2. The proliferation of monographs in non-specialized journals focusing on gender. At a state level and merely by way of example, the following are worthy of mention: the special number of the *Revista Latina de Comunicación Social* on gender violence and communication published in 2016; the monograph of No. 11 of *Redes.Com* entitled "Género y/en Comunicación" [Gender and/in Communication]; and that of the journal *Dígitos* on Women's Internet, "Prácticas, estereotipos femeninos y representaciones de género en la web" [Practices, feminine stereotypes and gender representations on the Web], published in 2018.

3. The consolidation of monographic academic congresses on gender: the presence of a large number of specialists and research in different specific gender studies forums has justified the field of knowledge's continued existence over the years. Examples include the biennial International Conference on Gender and Communication, organized by the University of Seville, whose fourth edition will be held in 2018. This university also hosts the International Conference on Micromachismo in Communication and Education, whose third edition is scheduled for 2018. By the same token, other higher education centers, such as the Oñati International Institute for the Sociology of Law (IISL) and the Polytechnic University of Valencia (UPV) have also organized encounters revolving around this theme over the past decade. In 2013, the IISL hosted the International Congress on Gender Violence: Intersectionalities, and in 2010 the International Congress on Woman, Art and Technology in the New Public Sphere was held at the UPV. Other relevant encounters on the 2018 agenda include the 10th International Congress of the

University Association for Women's Studies (AUDEM): *La universidad de las mujeres. Ocho siglos de luces y sombras* [*The university of women. Eight chequered centuries*].

However, despite the growing popularity of this field of scientific knowledge – which is only briefly addressed here – there is still a dearth of qualitative, quantitative and typological research in this regard. As with communication studies (Martínez Nicolás & Saperas Lapiedra, 2011), whose exponential growth began in the 1980s, while the first meta-analyses date back to the year 2000, this type of analysis has been practically conspicuous by its absence in gender and communication studies in Spain. In this respect, Caro González and Guarinos (2017) state that "there are multiple papers that have used bibliometrics in the field of communication, but none of them have influenced their practice on gender studies in a comparative way" (65). The only ones that stand out are a number of sectionalized studies such as those performed by Miquel-Segarra, Navarro-Beltrá and Martín-Llaguno (2016), Arranz Lozano (2015) and Navarro and Martín (2013), who in spite of providing interesting overviews of their specific areas (public relations and corporate communication, gender violence, and films and advertising, respectively), do not offer a general snapshot of gender and women's studies. However, this snapshot is utterly essential to evaluate, as has been done in the field of communication in general, the past and present of a line of research that is gradually gaining ground in Spain.

The observation of scientific research through the prism of academic production in specialized journals is a procedure with a meta-analytical track record (Fernández-Quijada & Masip, 2013; Navarro & Martín, 2013; Castillo & Carretón, 2010), and the study presented here, based on these advances in the general field of communication, shifts the focus towards the specific production of communication and gender studies.

As for the track record mentioned above, in 2010, Castillo and Carretón published a study of the main communication journals, whose sample was chosen according to IN-RECS, the impact index most used at the time. Their work provided an exhaustive description of the type of research that had been performed hitherto in Spain and already included the sex disaggregation of author data. The results revealed an unequal distribution: 53.7% of the papers were authored by men, versus 46.3% by women (Castillo & Carretón, 2010). Nevertheless, in the academic literature specifically dealing with gender issues there was a majority of authoresses (Navarro & Martín, 2013). Or, in other words, women are more inclined to inquire into this subject, which poses interesting questions for future research – in this regard, it should be noted that Caro González and Guarinos (2017) have studied the scientific productivity and collaboration of Spanish authors who have published papers

with a gender perspective in Scopus communication journals between 2008 and 2014.

Despite the importance of Castillo and Carretón's work as one of the first and foremost bibliometric studies of communication research in Spain, the sample used by these authors was restricted to papers published in 2008. Nevertheless, a year afterwards Martínez Nicolás and Saperas Lapiedra (2011) published a work based on four journals[8] with a much longer time frame, i.e. from 1998 to 2007. One of their most noteworthy conclusions, in the context of communication studies, was the superiority of those studies focusing on journalism from an empirical approach, as well as the lack of methodological rigor that was regrettably detected in a large proportion of the papers analyzed by them:

> [...] generally speaking, what is involved are empirical studies with serious methodological shortcomings, at least as far as the use of standardized data collection techniques is concerned. Only in a third of these works can such techniques be identified, whether they be quantitative or qualitative, with a clear predominance of those employed in media message studies (content and discourse analysis) and scant recourse to procedures for accessing data gathered from *live sources* (surveys, in-depth interviews, focus groups, etc.). (Martínez Nicolás & Saperas Lapiedra, 2011)

The study most similar to the one conducted here (Martínez-Nicolás, Saperas & Carrasco-Campos, 2017) provides a 25-year overview of academic production relating to journalism published in the top five Spanish communication journals.[9] It is based on the following "coding criteria" (154) which have served as inspiration and guidance for the research described here: knowledge interests (the journalistic field approached and the object of study) and modes of research (the type of research, methodological approach and techniques employed in empirical studies).

Here, the following basic elements have been recouped from the aforementioned studies: the sex disaggregation of author data (Navarro & Martín, 2013; Castillo & Carretón, 2010); the study of research methodologies and techniques (Arranz Lozano, 2015; Martínez Nicolás & Saperas Lapiedra, 2011); the types of objects of study (Martínez-Nicolás, Saperas & Carrasco-Campos, 2017; Martínez Nicolás & Saperas Lapiedra, 2011); and the collaboration between different research centers (Fernández-Quijada & Masip, 2013; Castillo & Carretón, 2010). What is noteworthy is the special attention paid to the following perspective in relation to the different methodological currents:

> Our interest in methodological paradigms, known as the quantitative or qualitative path to knowledge, is to observe their epistemological

> position in relation to the gender perspective. While it is true that it should be borne in mind that both paths are equally relevant and interesting for gaining insights into social reality, methodologically and epistemologically speaking there are, however, substantial differences in the way in which they understand this. (Arranz Lozano, 2015: 174)

If prior studies were taken into account to define the objectives of this work and its analytical design procedure, they were also equally decisive when selecting the sample. Thus, to specify the universe the reliability criterion applied by the majority of authors to date was followed: the impact factor. Accordingly, of the main international quality indicators of scientific research (and given that previously employed indicators, such as IN-RECS, are now outdated), the Journal Citation Reports (JCR) and the SCImago Journal Rank (SJR) were used as benchmarks in the sample selection process.

It is necessary at this juncture to return to the notion of gender in order to establish the limits of this study. Even though, as noted above, there are important differences between women's, gender and feminist studies, in this work and with the intention of offering the most comprehensive overview of the evolution of the topics addressed by these fields of knowledge in their intersection with communication research, it was decided to include all those papers dealing with gender issues in the sample, while embracing the view that "feminist critique […] is no longer the study of 'women,' but the analysis of gender relations, and of gender as a structuring principle in all human societies" (Moore, 1988: vii).

In short, partaking of the epistemological, conceptual and methodological differences between women's, gender and feminist studies, an inclusive selection criterion was used to perform the most exhaustive overview possible of the current state of the question. For, as Reigada Olaizola and Sánchez Leyva hold,

> The subtlety adopted by the exercise of power in the context of Western democracies, where we have witnessed a progressive appropriation and instrumentalization of language and the approaches historically vindicated by the dominant forces from the perspective of critical thought, obliges us to stay on our toes and update our concepts and initial approaches in a continual effort to relocate them and to give them critical meaning. (2007: 26)

5. Methodology

The longitudinal pretentions of this study are reflected, in the main, in its time frame (1988–2017, i.e. nearly three decades of academic production in the field of communication) and, secondly, in the exhaustive way in which

the units of analysis were selected, a task that was performed manually for extra certainty, rather than employing random search techniques or indexing processes. Specifically, all the gender-related papers comprising the sample were manually selected on the basis of a review-reading of each of one of issues (from the first to the last) of the journals under study, followed by a reading of each individual paper in order to verify its suitability. All these papers were readily available for consultation in the journals' digital repositories or were consulted through the authors' research centers.

5.1. Sample

Taking into account that in Spain it is still more common to publish in local journals than in the international ones, in order to select the most relevant journals and to examine the evolution of their research (Gartzia & Lopez-Zafra, 2014), the sample was narrowed down to Spanish journals indexed in one of the two most highly valued quality indicators of scientific production and with the greatest impact on European scientific production assessment bodies: JCR and SJR.

According to the aforementioned indicators, the corpus comprised papers published in nine Spanish communication journals which appeared in their 2016 rankings (units of context). All of the scientific production published in each journal, since their beginnings up until the end of 2017, was taken into consideration when selecting the documents for analysis (units of registration).

In order to obtain the units of analysis (gender-related papers published in the nine communication journals under study), a qualitative-manual research was performed on the papers comprising the sample. This was then fine-tuned by means of a careful reading of the abstracts of all the issues of the journals under study published before the end of 2017, before selecting all those papers that could be regarded as falling into the categories of "women's, gender and/or feminist studies."

Figure 1 shows the number of gender-related papers (N = 178) that were published in each one of the journals analyzed here – from its first issue until its last in 2017 – the sampling error being minimal since, as already noted, all the issues were selected manually.

Figure 1 Gender-related papers published in the communication journals indexed in JCR and SJR

Journal title	Since	Years	Quartile SJR	Quartile JCR	Total no. of papers	Gender papers	%
Comunicar	1993	25	Q1	Q1	1416	30	2.1%
Revista Latina de Comunicación Social	1998	20	Q1	-	1224	27	2.2%
Profesional de la Información	1997	19	Q2	-	2228	6	0.3%
Comunicación y Sociedad	1988	30	Q2	-	584	21	3.6%
Estudios Sobre el Mensaje Periodístico	1994	24	Q2	-	1037	43	4.1%
Historia y Comunicación Social	1996	22	Q3	-	768	27	3.5%
Signa	1992	26	Q3	-	357	19	5.3%
Scire	1995	23	Q3	-	419	4	1.0%
Ibersid	2007	11	Q4	-	267	1	0.4%
TOTAL				**-**	**8300**	**178**	2.1%

Own elaboration.

5.2. Methodological strategies

This empirical-analytical study is based on a quantitative content analysis. This technique, widely used in communication studies, has also been predominantly employed in meta-analytic studies, insofar as it is a systematic – the content is selected according to explicit and persistently applied rules, and the assessment and analysis procedures are just as standardized – objective – any analyst who applies the same procedures must obtain even results, although the interpretation factor cannot be completely ruled out – and quantitative analysis – since its purpose is to offer a precise representation of a set of messages as a whole (Wimmer & Dominick, 1996: 170). In this case, study variables previously employed in communication research in general were chosen, to which were added several new and specific ones adapted to the concrete goals of a descriptive and fundamentally exploratory study such as the one developed here.

The following outline includes all the variables analyzed in each one of the papers making up the sample:

A. General information
1. The issue number of the journal
2. Volume of the journal
3. Year of publication
4. Title
5. Keywords

B. Information on authorship
6. Number of authors
7. Sex of the authors

8. Sex of the last author
9. Sex of the first author

C. Proof of international collaboration and the research's adaptation to foreign languages

10. Academic affiliation of the authors
11. Existence of collaboration networks
[Reference to the different participating research centers and/or universities appearing in the author and affiliation section]
12. Type of collaboration networks
[Reference to the type of participating research centers and/or universities appearing in the author and affiliation section: national or international]

D. Type of research and approach

13. Topic
[Reference to the paper's central theme. A deductive categorization was used: identities; violence; representation/treatment/coverage; female production; work; education; politics; equality–inequality; childhood–adolescence; sports; maternity; the Internet and social networks; gender studies; disaggregated analyses; consumption; prostitution; and others]
14. Communication format under study
[Reference to the communication format under study: TV; the Internet and social networks; radio; advertising; the press; mass media; and others]
15. Methodology
[Assessment of the quantitative or qualitative character of the research]
16. Research tool employed
[Reference to the type of research technique employed out of the following: content analysis; bibliographic review; reasoned debate; discourse analysis; survey; interview; focus group; film analysis; participant observation; bibliometric analysis; Delphi; and others]
17. Data universe studied
[Reference to the type of units comprising the universe under study: news stories; scientific papers; ads; TV series; etc.]

5.3. Coding procedure

Concerning the analysis of the sample, firstly a coding protocol was agreed upon and created. Then, a pre-test was performed with the aim of learning how to code each case and to achieve high intercoder reliability. Moreover, throughout the analytical process, the problematic elements were debated and agreed upon in order to ensure analytical coherence. It should also be noted that due to the pioneering and exploratory nature of this study, it was decided not to make a formal distinction a priori between theoretical and empirical studies that both require independent analyses. To evaluate the presence of these studies, the item "techniques" was employed as a reflection of the approach to the problem under study.

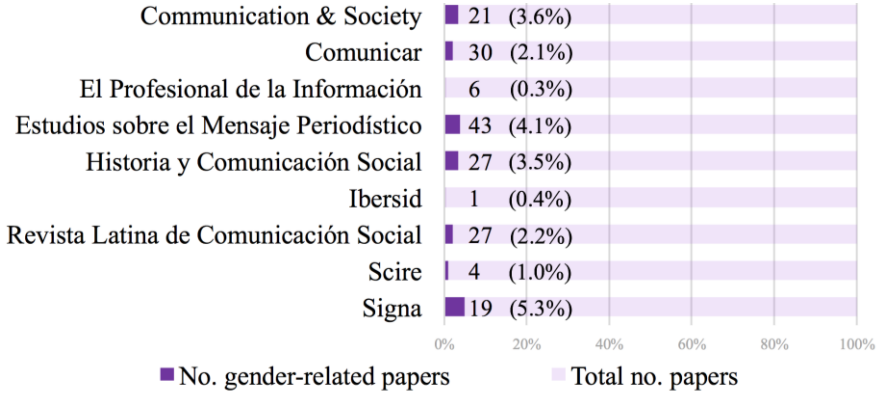
6. Results. Evolution and Characteristics of Communication and Gender Studies in Spain

6.1. Sample description: the scant presence of gender studies in communication

Since first appearing, Spain's top communication journals have published a total of 8300 papers of which only 178 (2.1%) cover issues pertaining to gender, women's and/or feminist studies.

The journals that have published the largest number of gender-related papers are as follows: *Estudios sobre el Mensaje Periodístico*, *Comunicar*, *Revista Latina de Comunicación Social* and *Historia y Comunicación Social*. Figure 2 shows the total number of gender-related papers published by each journal, in relation to the total number of papers (touching on any topic) published before the end of 2017. Thus, it can be seen that, although there are journals that have published a large number of gender-related papers (such as the aforementioned), these do not always coincide with those that have proportionally gone to greater efforts to highlight this topic.

Figure 2 Distribution of the total number of gender-related papers by journal

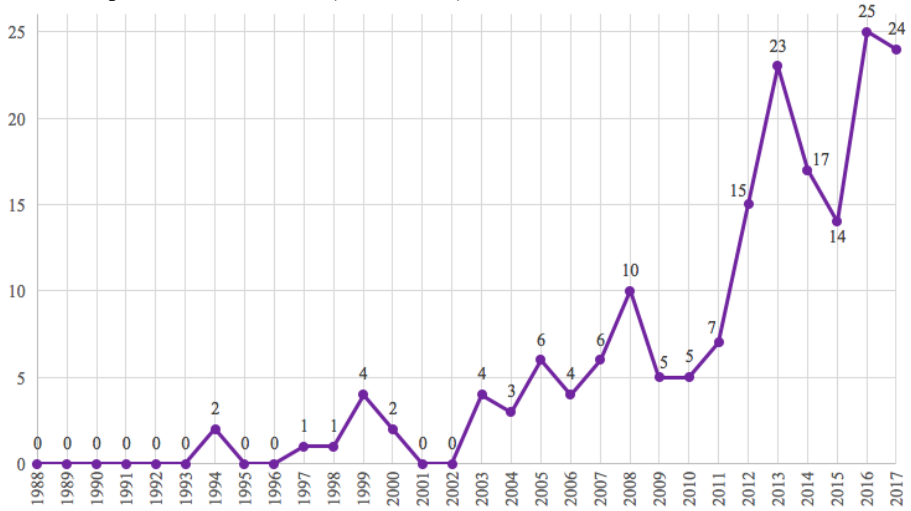


Own elaboration.

The first papers were published in 1994, one in the journal *Estudios sobre el Mensaje Periodístico* ("Comunicando violencia contra las mujeres [Communicating violence against women]," by Concha Fagoaga) and another in *Signa* ("La novela y la poética femenina [The novel and female poetics]," by M.ª del Carmen Bobes Naves). However, in the 1990s, as shown in the figure, only eight gender-related papers saw the light of day, versus the 40 published during the first decade of the twenty-first century. It is in the period between 2010 and 2017 that an exponential growth in this type of research can be detected, since 130 papers were published. The most prolific years were 2013, with 23 papers, 2016, with 24, and 2017, with 23. In this period

of growth in academic production with regard to gender and communication, it should be noted that 2014 and 2015 were exceptions to the rule, insofar as only 17 and 14 papers were published, respectively.

Figure 3 Evolution of the number of gender-related papers published over time (1988–2017)



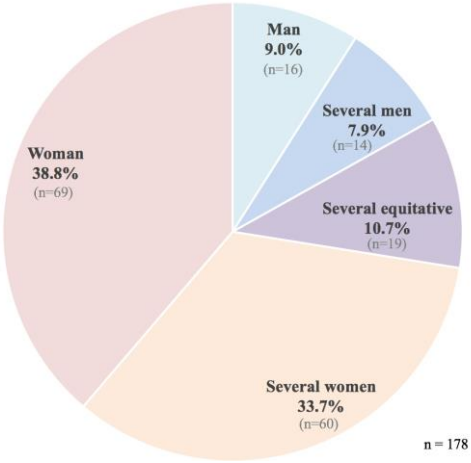
Own elaboration.

In general, although only 2.1% (N = 178) of the papers published in specialized Spanish communication journals over the past 30 years have dealt with gender issues, it can be argued that, as shown in Figure 3, there has been a clearly upward trend: zero papers in the 1980s;[10] eight in the 1990s; 40 in the first decade of the present century; and 130 in the last eight years. This coincides with the data presented in the introduction to this paper with respect to the number of PhD theses pertaining to women's and gender studies defended in Spain, which revealed a "practically exponential" average growth rate (Torres Ramírez & Torres Salinas, 2007: 17).[11] A similar phenomenon has been observed in gender-related research in the field of psychology (Gartzia & Lopez-Zafra, 2014).

6.2. Gender research in Spanish communication journals: A very feminized and barely internationalized field

The majority of scientific gender-related papers published in Spanish communication journals have been written by women, whether individually or collectively, corresponding to 73% of the total (Figure 4).

Figure 4 Distribution of authorship by sex



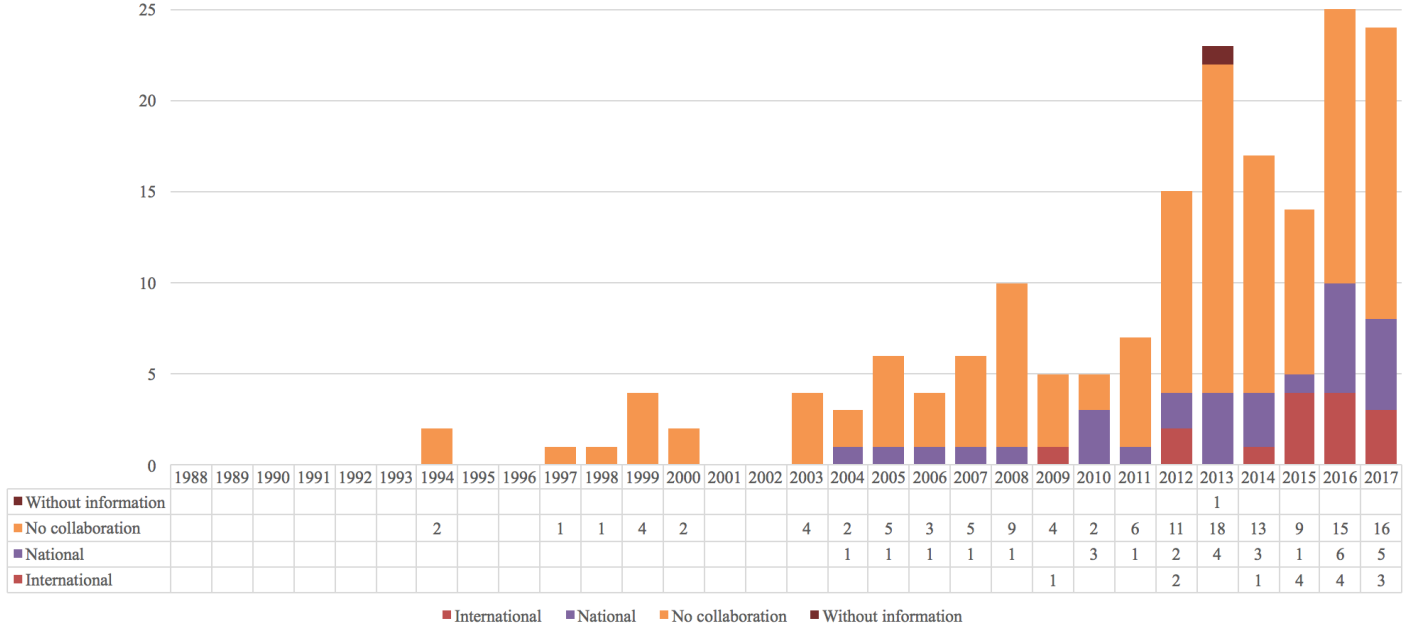
Own elaboration.

As regards collective efforts, irrespective of the group's composition, women were not only the first authors (in 76.3% of the cases), but also overwhelming the last ones (67.7%), which seems to tie in with the fact that the majority of research groups were entirely made up of women. Thus, of the total number of co-authored papers published, in 33.7% of the cases the co-authors were all women, while in 7.9% they were all men. This contrasts with scientific collaboration in general, in which men are more likely to collaborate with other men, while women tend to work with both other women and men (Araújo et al., 2017).

On a separate issue, this study, following a number of precedents, also inquired into the internationalization of gender and communication research in Spain. To assess this reality, two indicators were resorted to: the presence of groups comprising authors of both sexes affiliated with non-Spanish universities, that is, international collaboration and the translation of papers into other languages.

With respect to the type of collaboration networks established at the universities of the authors, it can be observed that only 8.4% of the papers had some sort of foreign involvement. Moreover, as shown in Figure 5, 74.2% were written by male and/or female researchers belonging to a sole university, to wit, if there had indeed been some kind of collaboration, this was restricted to the habitual scope of academic production with work colleagues of both sexes. As of 2014, there has been a progressive involvement of non-Spanish researchers and scholars in the papers published, as shown in Figure 5. Despite being relatively low in number, a trend towards the consolidation of a more cooperative and less individualistic form of work, also with a greater level of international collaboration, can apparently be observed.

Figure 5 Evolution of collaboration networks over time



Own elaboration.

The university that stands out most for its international collaboration is the Complutense University of Madrid, while at a national level the combinations that appear are not normally repeated. Noteworthy examples of universities with which researchers of both sexes, pursuing their work in international collaboration networks, are affiliated include the Complutense, Seville, Santiago de Compostela and the King Juan Carlos (Madrid). This international collaboration has to date involved the following research centers, among others: The Free University of Berlin (Germany); the University of Alaska Anchorage (USA); the Autonomous University of Ciudad Juárez (Mexico); and Hallym University (South Korea).

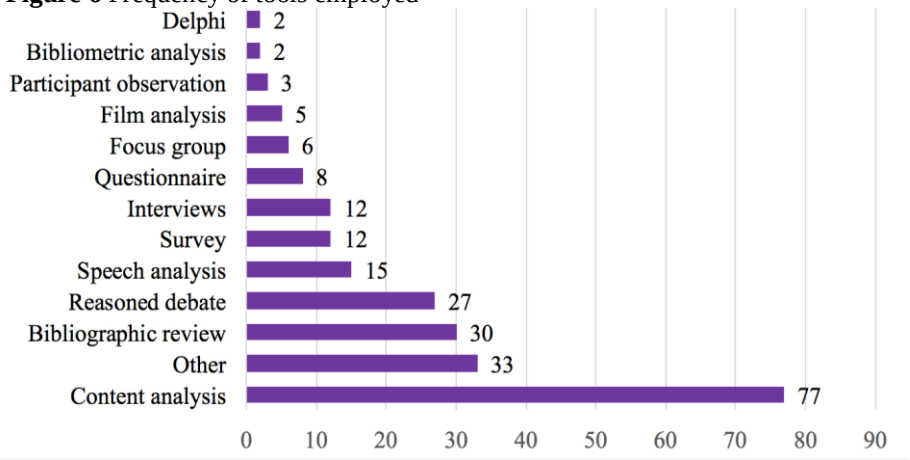
However, very few papers in several languages were detected: 85.4% were published only in Spanish, 10.7% in Spanish and English and a mere 3.9% exclusively in English.

6.3. On methodologies and formats: Gender issues are researched from a qualitative approach and in a large number of communication formats

One of the objectives here is to identify the most studied communication formats and the way in which researchers have approached them. Firstly, the results indicate that the qualitative approach was the most popular (50.6%), versus quantitative (29.8%) and mixed (18.7%) ones, which despite their strong presence were less frequently employed.

This trend towards qualitative methodologies is also borne out by the type of tools/techniques used to approach the objects of study, the most frequent being content analysis[12] (43.3%), bibliographic review (16.9%) and reasoned debate (15.2%).[13] The last two serve as an example of the importance that the interpretation of secondary data and theoretical production have in qualitative gender and communication research, as shown in Figure 6.[14]

Figure 6 Frequency of tools employed



Own elaboration.

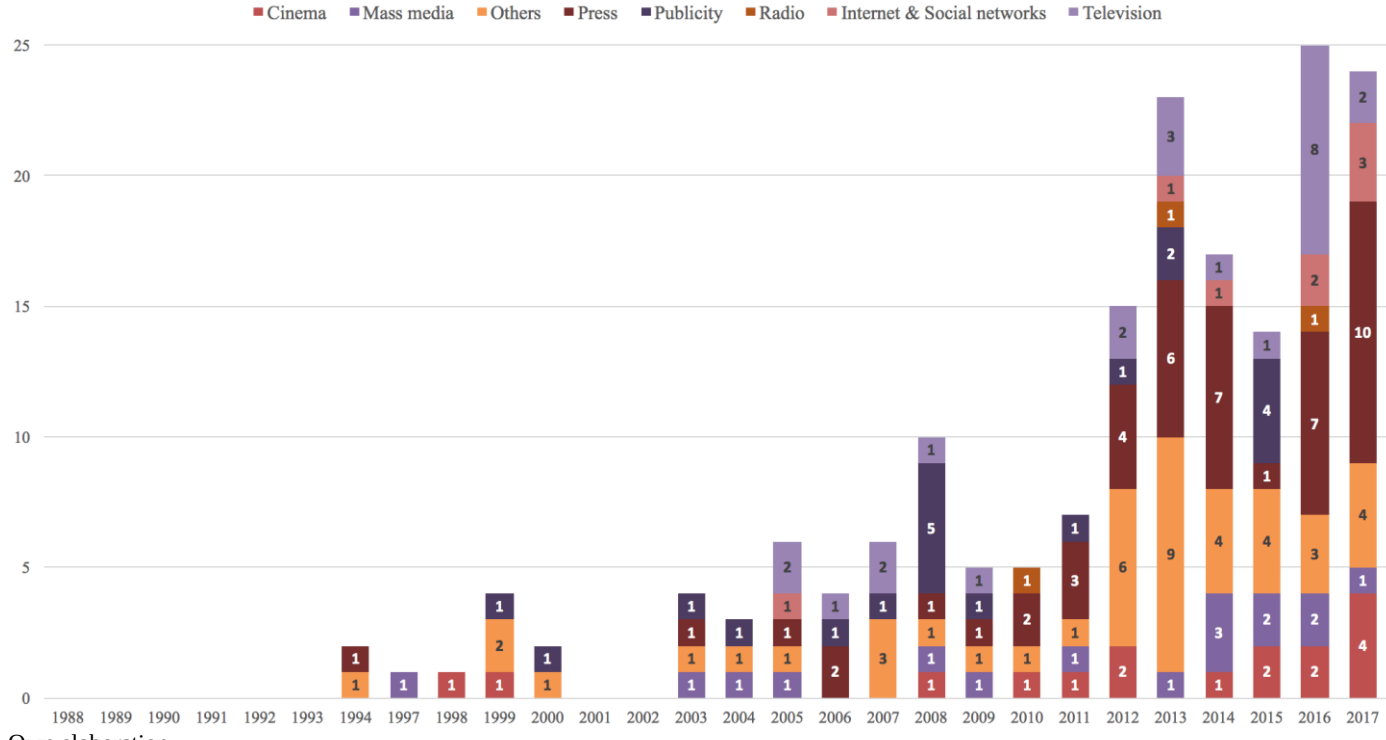
In relation to the most studied communication formats, and taking into consideration the deductive and artificial division that had to be performed to define the realities and objects of study, it is possible to perceive a marked trend towards studying the press (26.4%), versus radio (1.7%) and the Internet and social networks (4.5%). With respect to these last two formats, it should be noted that their popularity as objects of study has nonetheless increased over the past decade and what has recently been witnessed is most certainly a greater interest in these media on the part of the research community.

When analyzed longitudinally, a growing interest in audiovisual formats, above all television, but also social networks, has been detected. Furthermore, as can be seen in Figure 7, this has been accompanied by a progressive loss of interest in advertising formats. By the same token, from a comparative perspective what also stands out is the diversity of formats studied, 2008 marking a before and after in gender research: a before characterized by a predominance of the press, advertising and media as a whole; and an after when there has been a clear trend towards multiple formats.[15]

6.4. Research focusing on identities

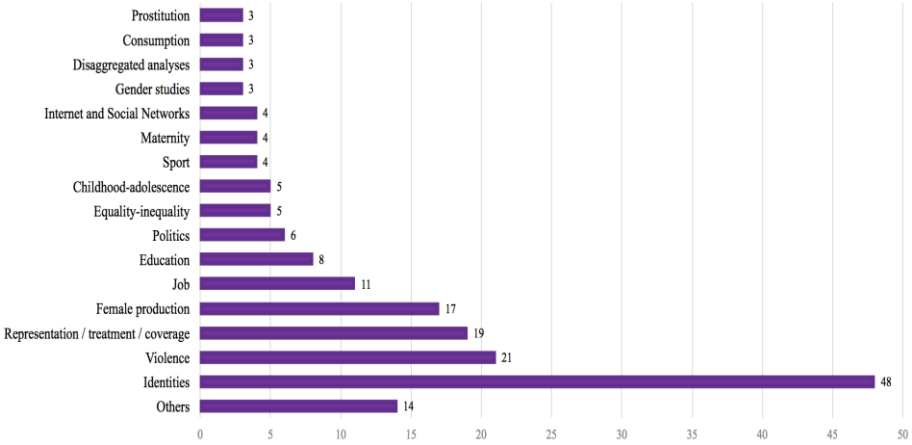
The main theme addressed in gender and communication studies to date, according to the results of the analysis performed here, has been what could generally be called "identities" (Figure 8). More specifically, out of the different options included in the previously established categorization (i.e. identities; violence; representation/treatment/coverage; female production; work; education; politics; equality–inequality; childhood–adolescence; sports; maternity; the Internet and social networks; gender studies; disaggregated analyses; consumption; prostitution; and others),[16] the most frequent topics are as follows: identities (27%), violence (11.8%) and representation/ treatment/coverage (10.7%).

Figure 7 Evolution of the communication formats studied



Own elaboration.

Figure 8 Distribution of academic production by topic



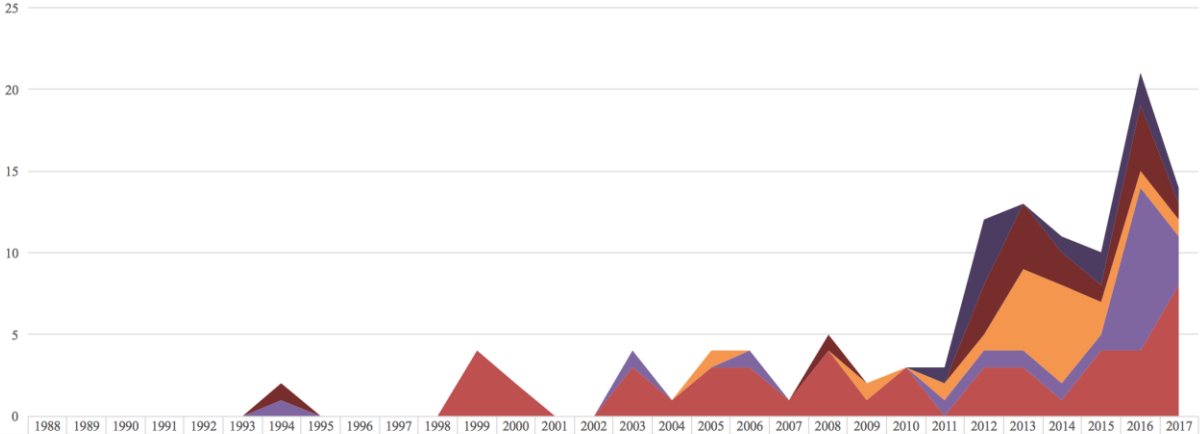
Own elaboration.

From an historical perspective, what again stands out is the fact that the progessive incorporation of these studies in the field of communication has been characterized by a broader range of themes. In contrast with the classic studies of the differential representation of women and men and violence treatment and discourses, topics such as maternity (1988–2010: one paper; 2011–2017: three), work (1988–2010: zero papers; 2011–2017: 11) and sports (1988–2010: zero papers; 2011–2017: four) have started to carve out a niche for themselves in the communication and gender research agenda (Figure 8 and 9).

Besides the main theme, the most recurrent secondary themes were also assessed. The latter provide a clear picture of the specific issues that have caught the attention of communication and gender research over the past few decades. For example, stereotypes are a secondary theme in 34 papers, identities in 28, work – which, as already noted, is fast becoming a main theme – in 25, tensions and analysis of equality-inequality in 13 and the concept of feminism in 11.

On the other hand, and bearing in mind the relevance of keywords, essential for indexing and disseminating scientific research, the NVivo programme[18] – specializing in qualitative or mixed unstructured data processing – was used to conduct a keyword frequency analysis focusing on the total number of gender- and communication-related papers comprising the sample. As can been observed in Figure 10, the keywords *género* [gender], *mujer* [woman], *comunicación* [communication] and *estereotipos* [stereotypes] are the most frequent.

Figure 9 Evolution of the main topic of papers over time[17]



	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Work																								1	4		1	2	2	1
Female production							1														1				3	4	2	1	4	1
Representation / treatment / coverage																		1				1		1	1	5	6	2	1	1
Violence							1									1			1					1	1	1	1	1	10	3
Identities												4	2			3	1	3	3	1	4	1	3		3	3	1	4	4	8

Own elaboration.

Figure 10 Graphic representation of the most frequently employed keywords



Own elaboration.

The keywords employed on more than 20 occasions are as follows: *género* [gender] (84), *mujer* [woman] (64), *comunicación* [communication] (31), *estereotipos* [stereotypes] (27), *medios* [media] (23), *televisión* [television] (22), *social* [social] (21), *violencia* [violence] (21) and *prensa* [press] (20). In addition to the most evident terms in communication and gender studies (i.e. *género*, *mujer* and *comunicación*), the rest of the keywords repeated most often broadly speaking reflect the predominant trend of the papers analyzed, i.e. approaches to gender representation, the stereotypes lingering in society today and structural problems (like violence against women) using media content analysis.

7. Discussion

An analysis of the results underscores that although communication and gender research is still a marginal field with proportionally very little influence on the discipline, it is nevertheless gradually gaining ground. What is involved is a field of research that has steadily diversified as regards the communication formats and themes with which it deals, for it is based on its historical links to journalism studies (Castillo & Carretón, 2010; Martínez Nicolás & Saperas Lapiedra, 2011) and has focused overwhelmingly on the

analysis of identities, violence and gender representations in the media, before gradually including new formats and topics. In this respect, maternity, work and sports are now more frequent objects of study. As to formats, besides becoming clearly more diverse, some that in previous stages aroused the greatest interest, such as those relating to advertising, have now been abandoned to a certain extent. This could be explained by the growing number of specialized journals and platforms available. In other words, it might not be due to the academic community's disaffection with certain formats, but to the fact that there are now more opportunities to publish these works in emerging specialized journals (in the field of advertising, for instance), which still have not been included in the ranking of journals with an impact factor.

Moving on to other issues, as has been seen in the results section, 2008 marked a turning point as regards both the proliferation of gender-related papers in communication journals and their diversification (topics, formats studied, etc.). In this connection, as highlighted on another occasion (Zurbano-Berenguer, 2015), emphasis should be placed on the far-reaching legislative changes and social progress in Spain since the turn of the century, not only concerning gender and equality (Spanish Organic Law 1/2004, 28 December, on Comprehensive Protection Measures against Gender Violence; Spanish Organic Law 3/2007, 22 March, for the effective equality of women and men, etc.), but also precisely in relation to the role of the media in this respect. For example, the aforementioned laws, as well as regional legislation seeking the same goals (Comprehensive Law 7/2012, 23 November, of the Valencian Government, on Violence against Women in the Valencian Community; Law 13/2007, 26 November, on Comprehensive Protection Measures against Gender-based Violence in Andalusia; Law 17/2015, 21 July, for the effective equality of women and men in Catalonia, etc.), highlight the social responsibility that the media has in the fight against gender-based violence and, more generally, in the achievement of equality between the sexes. What is more, on the basis of the above-mentioned laws, many regulatory bodies and media companies themselves have developed ethical codes in order to include the gender perspective in information practices and to inform about gender-based violence adequately. In this connection, over the past 15 years communication scholars have analyzed the impact that legislative changes and ethical codes have had on information about violence against women and, more generally, on society's perception of this social problem. In most cases the results point to a positive relationship between the promotion of legislative and feminist initiatives, like those referred to above, and the proliferation of ethical codes and improvements in the news treatment of gender-based violence (Zurbano-Berenguer & García-Gordillo, 2017; Htun & Weldon, 2013; Martínez, 2012).

On the other hand, another important change occurring in Spanish academia in 2008 should also be taken into account, i.e. ACADEMIA, an accred-

itation program for university teaching and research focusing on scientific productivity, launched by ANECA (National Agency for Quality Assessment and Accreditation of Spain). ACADEMIA, following international trends in accreditation systems, gives top priority to research. Within the specific field of communication, this decision is supposed to have led to both an increase in papers published in Spanish communication journals and the exponential growth of the presence of Spanish authors in international communication journals as from 2008 (Martínez-Nicolás, Saperas & Carrasco-Campos, 2017; Martínez-Nicolás & Saperas, 2016; Fernández-Quijada & Masip, 2013).

Returning to the results of this paper, with reference to the data on study typologies (national or international, depending on the academic affiliation of the authors), these coincide with those of the field of communication in general: there is an increasingly greater tendency towards teamwork and the participation of multinational groups (Fernández-Quijada & Masip, 2013). In this respect, it should be added that some journals have started to request that papers be translated into English. Therefore, an increase in the number of studies published in this language is to be expected in the near future. This will call for research into the influence (or not) that this greater international access to Spanish academic production – thanks to a wider use of English in scientific communication – may have on the international make-up of research groups at Spanish universities.

In the same vein, the specific methodology-related data on communication and gender research presented here coincide with existing information on the discipline of communication in general, for papers often do not include a credible methodological strategy and even frequently lack a clear description of the tools and methods employed. By the same token, in recent research (Madison & Söderlund, 2018; Söderlund & Madison, 2017) the aforementioned weaknesses have also been detected in scientific production in the area of gender studies. Beyond that, when the methodological conception and design are clearly set out, content analysis has been to date the most frequently used technique in the field of communication (Castillo & Carretón, 2010; Martínez Nicolás & Saperas Lapiedra, 2011).

8. Conclusions

As regards the objectives established at the beginning of this work, the following can be claimed:

1. With respect to the number of papers dealing with gender, women's and feminist studies appearing in Spanish communication journals in comparison with those dedicated to other topics, it can be held that, proportionally speaking, the number of gender-related papers is still negligible, although a gradual and patchy increase has been observed, depending on the journal.

2. On the subject of gender biases, there is a clear feminization of this field of study.

3. The predominant methodological techniques are qualitative and the most frequently used tool is content analysis.

4. Lastly, it can be claimed that gender research in Spanish communication journals is mostly a solitary endeavor. That is, regarding the authorship of the papers comprising the study corpus, it seems that there are not many specialists working in gender and communication. Furthermore, in relation to the typology (national or international) of the studies analyzed here, the authors do not tend to participate in collaboration networks, not to mention international ones.

To conclude, it should be stressed that some of the characteristics of gender and communication research in Spain outlined throughout this study are conditioned by constants and circumstances on a much greater scale outside its control. For example, the widespread feminization of scientific production in this field of knowledge can be explained to a great extent by the very tradition of gender, women's and feminist studies which have been developed, both in Spain and abroad, practically always by female professors and/or researchers.

Moreover, the scant collaboration and internationalization of academic production in this regard has to do above all with the lack of funding for science – above all the social and human sciences – in Spain.[19] To which must be added the limiting factor of language, particularly in an international scientific context in which English is fast consolidating its position as the sole lingua franca in scientific research.

In view of the results presented here and the confirmation of the initial hypothesis suggesting a still very negligible presence of gender research in Spanish communication journals, it is urgent to evaluate this situation. Given the growing political and scientific interest in gender issues, these results distort the current state of affairs from the perspective of what would be socially desirable.

Thus, it is held here that one of the future challenges will be to inquire into whether the scant presence of gender research in Spanish communication journals is due to a real absence of these studies, the preference of researchers for feminist and/or specialized platforms or a certain degree of reluctance on the part of these journals to accept papers dealing with this subject matter. Along these lines, in future research it would be interesting to analyze what kind of communication studies are published in specialized gender journals, with a view to comparing the results with those presented here and to providing further information on current trends in communication and gender studies.

NOTES

1. Purists could criticize this study by claiming that gender, feminist or women's studies are not the same, and this is true. Assuming, as with Narotzky (1995), that "a scientific conceptual progression has existed over the past decades" (13), research into women in a socio-historical context analyzing their existence in the scientific continuum through their participation in life and societies could fall into the category of women's studies. In contrast, new gender approaches are currently addressing the reality of women from the articulation rationales of an unevenly distributed power that defines normative identities and inter-gender relationships by means of symbolic-identity (i.e. cultural) constructions based on biological sexual identity. However, given that this study intends to ascertain the presence that gender equality research, the sexes, gender and representations and identities relating to all these issues have had in scientific production as regards communication in Spain, both fields of study, which share many aspects, have been deemed equally useful for meeting the objectives established here.

2. These authors have warned that, in the last search preformed in Teseo in May 2006, not one PhD thesis defended that year was retrieved, and only 35 for 2005, for which reason the results of their study correspond to the period 1976–2005 (with the aforementioned limitations as regards this last year).

3. For a detailed description of the methodology employed, see De Torres Ramírez & Torres Salinas, 2007: 14–16; De Torres Ramírez & Torres Salinas, 2005: 480–482.

4. "feminista$ OR (feminism$) OR (mujer$ AND violen$) OR (androcentris$) OR (division AND sexu$ AND trabaj$) OR (identid$ AND femenin$) OR (movimient$ AND femisnis$) OR (mujeres AND hombres) OR (patriarcad$) OR (perspectiva$ de genero) OR (rol$ AND sexu$) OR (sexism$) OR (liberacion AND mujer$) OR (mujer$ AND genero)."

5. For instance, those PhD theses that at some juncture refer collaterally to women, but whose objective and/or methodology does not dovetail with the gender approach; those that in the field of health sciences address matters pertaining to gynecology or medical research using groups of women as a sample, without ever alluding to the gender difference or approaching the object of study from a feminist perspective; etc.

6. By way of example, the Spanish search term *género* [gender] yields 1,722 results in Teseo. But in many cases, it refers to "genre" (the Spanish term encompasses both meanings). And the same occurs with other polysemous lexemes such as *mujer* [woman] and *igualdad* [equality].

7. A system based on the UNESCO nomenclature for fields of science and technology.

8. *Anàlisi* (Autonomous University of Barcelona, published since 1980), *Comunicación y Sociedad* (University of Navarre, since 1988), *Estudios sobre el Mensaje Periodístico* (Complutense University of Madrid, since 1994) and *Zer – Revista de Estudios de Comunicación* (University of the Basque Country, since 1996).

9. *Anàlisi*, *Comunicación y Sociedad*, *Estudios sobre el Mensaje Periodístico*, *Revista Latina de Comunicación Social* (University of La Laguna, published since 1998) and *Zer – Revista de Estudios de Comunicación*.

10. In the past two decades, to be more precise, since none of the specialized communication journals comprising the study sample existed before then.

11. By way of illustration, five PhD theses on gender and women's studies were defended between 1976 and 1979; 44 between 1980 and 1989; 249 in the 1990s; and 309 only between the year 2000 and 2004.

12. Content analysis, which is usually defined as a quantitative method, can also be qualitative. As explained by Bardin (1986), until the mid-twentieth century rigor and quantification were the specific characteristics of content analysis, but afterwards it was understood that what was inherent to it "is inference (variables inferred from variables of inference at a message level), irrespective of whether or not the modalities of inference are based on quantitative indicators" (88). Normally, the quantitative approach is based on the frequency with which the elements measured appear, while the qualitative approach focuses on non-frequency indicators, such as the presence or absence of the variables analyzed (López-Aranguren, 2015). Moreover, the qualitative modality is regarded as "evolutionary," versus the rigidness of the quantitative one, namely, the hypotheses that are initially formulated evolve as the process advances and the analyst alternates the (re-)reading of the material with interpretations, "functioning by means of successive approaches" and also by being flexible in the use of indexes (Bardin, 1986: 88). The majority of the papers studied here used qualitative content analysis.

13. This expression refers to that theoretical discourse unrestrained by specific or explicitly delimited research techniques.

14. The "Others" category comprises those tools that have not been used very often, including the following: contextualized historical narrative; documentary analysis; narrative analysis; character analysis; hermeneutic analysis; sociological analysis; semiotic analysis; framing analysis; etc.

15. With regard to the "Others" category, it has an important presence because it groups a highly diverse number of minority communication study formats – when compared with the classic media and new technologies – i.e. music, infographics, Net.art, different literary genres, scientific literature, etc.

16. The "Others" category includes topics that are not proportionally important enough to constitute independent categories, such as the following: feminine press; sexuality; discrimination; bodies; law; music; academic production; feminisms; and feminist libraries and science.

17. Since the large number of topics covered in the papers under study makes their graphic representation extremely difficult, this figure only shows the evolution of five thematic categories mentioned in more than 10 papers.

18. This tally involves keywords defined as such by the authors of the papers under study. Out of the 178 papers comprising the corpus, not all of them explicitly employ these keywords, for which reason in the tally only the 166 papers that do indeed employ them were taken into account. Specifically, out of all the keywords included in these papers, those repeated on more than three occasion were selected using the NVivo 11 software that counts them automatically, while discarding "empty words" – also called "'functional connectors': articles, prepositions, pronouns, adverbs, conjunctions, etc." (Bardin, 1986: 62). In other words, the results shown in Figure 10 only take into consideration "full words" that, furthermore, were then grouped manually under a sole term (for instance: *femenina*, *femenino*, *femeninas* and *femeninos* – the masculine, feminine, singular and plural forms of the word "feminine" in Spanish – appear in Figure 10 under the term *femeninas*, which is the

most repeated form in the papers under study). Likewise, words with just one meaning but in another language were also grouped as before under one term (*mujeres*, *mujer* and "women" and "woman" appear in Figure 10 under the term *mujer*, as before the most repeated keyword). On the other hand, both the figures and full words irrelevant to the objectives of this study were not taken into account when they appeared in an isolated fashion (for example, *primera* [first], "issues", etc.).

19. Updated information in this respect can be consulted in a critical article recently published in the newspaper *El País* (Domínguez, 2017).

REFERENCES

Araújo, E. B., Araújo, N. A., Moreira, A. A., Herrmann, H. J., & Andrade Jr, J. S. (2017). "Gender Differences in Scientific Collaborations: Women Are More Egalitarian than Men," *PLOS One* 12(5): e0176791.

Arranz Lozano, F. (2015). "Meta-análisis de las investigaciones sobre la violencia de género: el Estado produciendo conocimiento," *Athenea digital* 15(1): 171–203.

Ballarín Domingo, P., Gallego Méndez, M. T., & Martínez Benlloch, M. I. (1995). *Los Estudios de las Mujeres en las Universidades españolas 1975–91. Libro Blanco*. Madrid: Instituto de la Mujer.

Bardin, L. (1986). *Análisis de contenido*. Torrejón de Ardoz: Akal.

Biscarrat, L. (2015). "Género, disciplinariedad y estudios mediáticos: una aproximación al caso francés," *Revista Internacional de Comunicación y Desarrollo (RICD)* 1(2): 139–147.

Blázquez, M. (2015), "Tesis doctorales en las universidades españolas durante el periodo 1977–2014," *mblazquez.es – Investigación en Documentación*. https://bit.ly/2KMc08t (accessed: July 12, 2018)

Caffarel-Serra, C., Ortega-Mohedano, F., & Gaitán-Moya, J. A. (2017). "Communication Studies Research within Spanish Universities Spanning the Years 2007 to 2014," *El profesional de la información* 26(2): 218–227.

Caffarel, C., Ortega, F., & Gaitán, J. A. (2018). "Communication Research in Spain: Weaknesses, Threats, Strengths and Opportunities," *Comunicar* XXVI(56): 61–70.

Caro González, F. J., & Guarinos, V. (2017). "Male Presence in Gender Research Networks in the Communication Field in Spain," *Masculities & Social Change* (6)1: 62–90.

Carlyle, K. E., Slater, M. D., & ChakroffJ, L. (2008). "Newspaper Coverage of Intimate Partner Violence: Skewing Representations of Risk," *Journal of Communication* 58(1): 168–186.

Castillo, A., & Carretón, M. C. (2010). "Investigación en comunicación: Estudio bibliométrico de las revistas de comunicación en España," *Comunicación y Sociedad* XXIII(2): 289–327.

Castillo, A., & Xifra, J. (2006). "Investigación bibliométrica de las tesis doctorales españolas sobre relaciones públicas (1965–2005)," *Anàlisi* 34: 141–161.

De Torres Ramírez, I., & Torres Salinas, D. (2005). "Tesis doctorales sobre Estudios de las Mujeres en España (1976–2002). A propósito de un indicador definitivo en investigación," *Revista Española de Documentación Científica* 28(4): 480–500.

De Torres Ramírez, I., & Torres Salinas, D. (2007). *Tesis Doctorales sobre Estudios de las Mujeres en las Universidades de España (1976–2005). Análisis Bibliométrico y Repertorio Bibliográfico*. Sevilla: Instituto Andaluz de la Mujer.

DiFrancesco, M. C., & Ochoa, D. J. (2017). *Gender in Spanish Urban Spaces. Literary and Visual Narratives of the New Millennium*. Chicago, IL: Palgrave Macmillan.

Domínguez, N. (2017). "El colapso de la ciencia en España," *El País*. https://goo.gl/Ci52DC (accessed: Feb. 21, 2018)

Fernández-Quijada, D., & Masip, P. (2013). "Three Decades of Spanish Communication Research: Towards Legal Age," *Comunicar* XXI(41): 15–24.

Foss, K. A., & Foss, S. K. (1983). "The Status of Research on Women and Communication," *Communication Quarterly* 31(3): 195–204.

Fuentes-Pujol, E., & Arguimbau Vivó, L. (2010). "Las tesis doctorales en España (1997–2008): análisis, estadísticas y repositories cooperativos," *Revista Española de Documentación Científica* 33(1): 63–89. doi:10.3989/redc.2010.1.711

Gartzia, L., & Lopez-Zafra, E. (2014). "Gender Research in Spanish Psychology: An Overview for International Readers," *Sex Roles* 70(11/12): 445–456.

Hawkesworth, M. (2011). "Signs 2005–2015: Reflections on the Nature and Global Reach of Interdisciplinary Knowledge Production," *Signs: Journal of Women in Culture and Society* 36(3): 511–519.

Hernández Orellana, M. (2018). "Le genre comme catégorie d'analyse dans les SIC: un dialogue entre l'Amérique latine et la France est-il possible?," *Revue française des sciences de l'information et de la communication* 13. doi: 10.4000/rfsic.3580

Htun, M., & Weldon, S. L. (2013). "The Civic Origins on Progressive Policy Change: Combating Violence against Women in Global Perspective, 1975–2005," *American Political Science Review* 106(3): 548–569.

Jones, D. E., Baró, J., Landa, C., & Ontalba-Ruipérez, J. A. (2000). *Investigación sobre comunicación en España: Aproximación bibliométrica a las tesis doctorales (1926–1998)*. Barcelona: ComCat.

Julliard, V. (2014). "Un mode d'appropriation des gender studies par les sciences de l'information et de la communication: la sémiotique du genre," *Questions de communication* 25: 223–243.

Kitch, S. L. (2003). "Programs and the Research Mission of Women's Studies: The Case for Interdisciplinarity," *Feminist Studies* 29(2): 435–447.

Kitch, S. L., & Fonow, M. M. (2012). "Analyzing Women's Studies Dissertations: Methodologies, Epistemologies, and Field Formation," *Signs: Journal of Women in Culture and Society* 38(1): 99–126.

Lindsay-Brisbin, J., Deprince, A. P., & Welton-Mitchell, C. (2014). "Missed Opportunities: Newspaper Reports of Domestic Violence," *Journal of Aggression, Maltreatment & Trauma* 23(4): 383–399.

Lombardo, E. (2017). "The Spanish Gender Regime in the EU Context: Changes and Struggles in Times of Austerity," *Gender, Work & Organization* 24(1): 20–33.

López-Aranguren, E. (2015). "El análisis de contenido tradicional," in García Ferrando, M., Alvira, F., Alonso, L. E., & Escobar, M. (eds.), *Análisis de la realidad social. Métodos y técnicas de investigación*. Madrid: Alianza, 594–616.

Luengo, M. (2018). "Gender Violence: The Media, Civil Society, and the Struggle for Human Rights in Argentina," *Media, Culture and Society* 40(3): 397–414.

Madison, G., & Söderlund, T. (2018). "Comparisons of Content and Scientific Quality Indicators across Peer-Reviewed Journal Articles with More or Less Gender Perspective: Gender Studies Can Do Better," *Scientometrics*. doi:10.1007/s11192-018-2729-3.

Martínez, B. (2012). "Periodismo y responsabilidad social: el paradigma del tratamiento informativo de la violencia contra la mujer," *Revista de Comunicación Vivat Academia* 19: 58–70.

Martínez Nicolás, M., & Saperas Lapiedra, E. (2011). "La investigación sobre Comunicación en España (1998–2007). Análisis de los artículos publicados en revistas científicas," *Revista latina de comunicación social* 66: 101–129.

Martínez-Nicolás, M., & Saperas, E. (2016). "Objetos de estudio y orientación metodológica de la reciente investigación sobre comunicación en España (2008–2014)," *Revista Latina de Comunicación Social* 71: 1365–1384.

Martínez-Nicolás, M., Saperas, E. & Carrasco-Campos, A. (2017). "Journalism Research in Spain. Analysis of Research Articles Published in Spanish Journals over the Past 25 Years (1990–2014)," *Communication & Society* 30(4): 149–166.

Miquel-Segarra, S., Navarro-Beltrá, M., & Martín-Llaguno, M. (2016). "Estudio bibliométrico del sector profesional de las relaciones públicas y la comunicación corporativa con perspectiva de género en las revistas indexadas en Web of Science Core Collection, Scopus y Proquest Central (1992–2014)," *Feminismo/s* 27: 263–286.

Moore, H. L. (1988). *Feminism and Anthropology*. Minneapolis, MN: University of Minnesota Press.

Muñoz Muñoz, A. (2004). "Representación de los Estudios de Género en los índices temáticos," *El profesional de la información* 13(1): 47–60.

Nagalia, S. (2018). "Conceptualising Gender Studies: Curriculum and Pedagogy," *Indian Journal of Gender Studies* 25(1): 79–107.

Narotzky, S. (1995). *Mujer, mujeres, género. Una aproximación crítica al estudio de las mujeres en las Ciencias Sociales*. Madrid: Consejo Superior de Investigaciones Científicas.

Navarro, M., & Martín, M. (2013). "Análisis bibliométrico de la investigación sobre mujer y publicidad: diferencias en medios impresos y audiovisuales," *Comunicar* XXI(41): 105–114.

Ortiz Gómez, T. (1999). *Universidad y Feminismo en España (II). Situación de los Estudios de las Mujeres en los años 90*. Granada: Universidad de Granada.

Ortiz Gómez, T. (2004). "Consolidación y visibilidad de los Estudios de las Mujeres en España: logros y retos," in Ruiz-Tagle, A. M. (ed.), *Los Estudios de las Mujeres en las Universidades andaluzas*. Sevilla: Universidad de Sevilla, 109–148.

Pastor Gosalbez, I., & Acosta Sarmiento, A. (2016). "La institucionalización de las políticas de igualdad de género en la Universidad española. Avances y retos," *Investigaciones Feministas* 7(2): 247–271.

Pavlidou, T. (2011). "Open Forum: The Challenge of Interdisciplinarity: From Theoretical Claims to Interdisciplinary Practices in Gender Studies," *European Journal of Women's Studies* 18(3): 310–317.

Reader, B. (2012). "Free Press vs. Free Speech? The Rhetoric of 'Civility' in Regard to Anonymous Online Comments," *Journalism & Mass Communication Quarterly* 89(3): 495–513.

Reigada Olaizola, A., & Sánchez Leyva, M. J. (eds.) (2007). *Crítica feminista y comunicación*. Salamanca: Comunicación Social.

Repiso, R., Delgado-López-Cózar, E., & Torres-Salinas, D. (2011a). "Análisis bibliométrico de la producción española de tesis doctorales sobre Cine. 1978– 2007," in Bort-Gual, I., García-Catalán, S., & Martín-Núñez, M. (eds.), *IV Congreso Internacional sobre Análisis Fílmico. Nuevas tendencias e hibridaciones de los discursos audiovisuals en la cultura digital contemporánea*. Madrid: Ediciones de la Ciencias Sociales de Madrid, 976–987.

Repiso, R., Delgado-López-Cózar, E., & Torres-Salinas, D. (2011b). "Bibliometric and Social Network Analysis Applied to Television Dissertations Presented in Spain (1976–2007)," *Comunicar* XIX(37): 151–159. doi:10.3916/C37-2011-03-07

Rodríguez-Darias, J., & Aguilera-Ávila, L. (2017). "Gender-based Harassment in Cyberspace. The Case of Pikara Magazine," *Women's Studies International Forum* 66: 63–69.

Rodríguez-Pérez, M., & Gutiérrez, M. (2017). "Femvertising: Female Empowering Strategies in Recent Spanish Commercials," *Revista de Investigaciones Feministas* 8(2): 337–351.

Sanz-Casado, E. (ed.) (2018). *Informe IUNE 2018: Actividad investigadora de las universidades españolas*. Madrid: Research Institute for Higher Education and Science (INAECU).

Söderlund, T., & Madison, G. (2015). "Characteristics of Gender Studies Publications: A Bibliometric Analysis Based on a Swedish Population Database," *Scientometrics* 105(3): 1347–1387.

Söderlund, T., & Madison, G. (2017). "Objectivity and Realms of Explanation in Academic Journal Articles Concerning Sex/Gender: A Comparison of Gender Studies and the Other Social Sciences," *Scientometrics 112*(2): 1093–1109.

Verge, T., & Cabruja, T. (2016). "La perspectiva de gènere en docència i recerca a les universitats de la Xarxa Vives," http://vives.org/PU3.pdf (accessed: June 27, 2018)

Vidal-Beneyto, J. (1986). "Présentation," *Encrages – Les industries de la langue. Enjeux pour l'Europe. Actes du colloque de Tours* 16: 5–7. https://goo.gl/2oVz4B

Weber, P. (2014). "Discussions in the Comments Section: Factors Influencing Participation and Interactivity in Online Newspapers' Reader Comments," *New Media and Society*16(6): 941–957.

Wimmer, R. D., & Dominick, J. R. (1996). *La investigación científica de los medios de comunicación: una introducción a sus métodos*. Barcelona: Bosch.

Wozniak, J. A., & McCloskey, K. A. (2010). "Fact or Fiction? Gender Issues Related to Newspaper Reports of Intimate Partner Homicide," *Violence Against Women* 16(8): 934–952.

Zurbano-Berenguer, B. (2015). *Discurso periodístico y violencias contra las mujeres. Aproximaciones a la construcción y valoración de los mensajes informativos en la prensa de referencia en España (2000–2012).* Doctoral dissertation, University of Seville. Retrieved from https://bit.ly/2HnsCPf

Zurbano-Berenguer, B., & García-Gordillo, M. (2017). "Propuesta metodológica para la evaluación de la calidad deontológica de las noticias sobre violencias contra las mujeres," *Communication and Society* 30(1): 73–85.

ISSN 2378-3524