

Christiane Kaufmann & Gerd Bohner

Masculine Generics and Gender-aware Alternatives in Spanish¹

Feminist linguistics have established that the use of masculine generics (MG), i.e. linguistic forms that are used sex-specifically in reference to men and generically in reference to mixed groups, leads perceivers to over-represent the men in their mental representation of people. We review empirical research on MG and summarize an experiment we conducted on effects of MG in Spanish. In that experiment, 195 participants read short stories in which groups of people were referred to with either MG or one of two gender-aware alternative forms. Then participants gave names to the stories' protagonists, which we used as indicators of their mental gender representation. Analyses showed that MG evoked a male bias in this task, and that the alternative forms alleviated this bias. More implicit gender associations, which we additionally assessed with a word-fragment completion task, showed no clear effect of language form. Ambivalent sexism and attitudes toward gender-aware language did not affect any of the dependent variables. In discussing the results, we present recommendations for gender-fair language use and develop ideas for further research.

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Gender inequality is a phenomenon that can be observed in societies throughout the world. The Global Gender Gap Index 2013 of the World Economic Forum (Hausmann, Tyson, Bekhouche, & Zahidi, 2013) quantifies the magnitude of gender-based disparities in political, economical, educational, and health-related criteria, and none of the 136 countries examined reached gender equality. According to the World Health Organisation (WHO), being a woman is a main health risk factor worldwide (García-Moreno, Jansen, Ellsberg, Heise, & Watts, 2005). How these disparities are caused and how they can be tackled are complex questions that touch upon many different aspects of human history, culture, politics, and more. One causal factor may be the constitutive role of language. Feminist writers have conceptualized language as a principal element for the stabilization of social conditions as well as an active means for emancipatory transformation and change (for a review and discussion, see Butler, 1990, especially chapter 1.VI). Concerning gender, this means that, on the one hand, language may represent, reproduce, and reinforce the status quo of gender relations in society, but, on the other hand, may also be used as an instrument of conscientization and change.

Representation of Gender in Language

In order to talk about the representation of gender in languages, we first need to clarify some terms. According to the Merriam-Webster dictionary, "gender" refers to the cultural and social traits typically associated with one sex, whereas the term "sex" refers to biological aspects. We consider both sex and gender to be social constructs and neither determined nor determining categories (for a detailed argumentation, see Voß, 2010). In this text, we only employ the term "gender", because we are interested in social roles and not in biological parts. For the same reason, when talking about "women" and "men" as well as "female" and "male," we also refer to gender, not to sex.

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In all language systems, the genders are represented somehow. According to Stahlberg, Braun, Irmen, and Sczesny (2007), the variation of structural differences between languages concerning their representation of the genders can be distinguished into three main language types: Grammatical gender languages, natural gender languages and genderless languages. In the grammatical gender languages (GGL), such as German, Spanish, Russian, Hebrew, and others, gender is coded as a grammatical category: Every noun is either feminine or masculine (or neuter in some languages), and nearly all personal nouns, adjectives, and pronouns carry gender markers, so that reference to gender is very frequent. (An example in Spanish: “Una trabajadora francesa fue la mas simpatica del grupo de voluntarios.”) In natural gender languages (NGL) like English or Scandinavian languages there is no grammatical marking of gender in nouns, and most personal nouns refer to both genders (e.g., English: “student”, “neighbour”, “doctor”), whereas personal pronouns reflect the gender of human beings (e.g., English: “Every student wants to give **his/her** best.”). There are also languages without grammatical gender at all, neither in the noun system nor in personal pronouns. Gender is only expressed by lexical means (e.g., in words like Turkish “erkek” = “man, male” or “kiz” = “girl”). These languages are called genderless languages (GL) and include Turkish, Finnish, Iranian, Chinese, Swahili, and others. In spite of these structural differences, it is not the language type that makes a language more or less sexist or egalitarian. As Stahlberg et al. (2007) point out: “However, expressing or concealing sex in language is not in itself sexist or non-sexist. The decisive question is whether references to sex are *symmetrical* (...)” (p. 167, emphasis ours), which means that the genders are treated linguistically equally. In fact, asymmetries regarding gender references are found in all three language types.

An example for these asymmetries is the markedness of female/feminine forms. As we see, for example, in the German words for male teachers “Lehrer” and female teachers “Lehrerinnen”, the female form has an additional suffix to the male form, is longer and more complex. This kind of suffixes, which can be found in each language type, mark femaleness as a deviation from a male norm. There are many other forms of asymmetries in language structure. Probably the most systematic type of asymmetries are masculine generics (MG). In the words of Stahlberg et al. (2007), MG are “linguistic forms with a double function: They are used sex-specifically in reference to male persons and generically in reference to mixed groups and to people whose sex is unknown or irrelevant” (p. 169). Examples from the three language types would be, for Spanish (GGL): “los estudiantes” = the students, referring to groups of men as well as to mixed groups; for English (NGL): “Everyone should take responsibility for his life”; and for Turkish (GL): “adam” means both “man” and “human being”). Forms of MG can also be found in each language type, but GGLs have the highest frequency of MG as they have the most gender-referring forms. The use, impact, and reform of MG have always been a main issue of feminist language critique and its opponents.

Debate on Feminist Language Critique

Already in 1895, Elizabeth Cady Stanton criticized the use of masculine generic pronouns as a symbol of oppression of women and recommended using the neutral pronoun “they” to prevent misunderstandings. Since then, linguists, sociologists, psychologists, and political activists have joined the debate with many different opinions and explications. Altogether, two main argumentation lines can be identified. Feminist language critique claims that the use of MG makes women and women’s rights, interests, and achievements

invisible, and supports a fundamentally androcentrist view of the world, in which the male is depicted as the norm and the female as deviant. Representatives of this point of view are Luise Pusch (1980) and Senta Trömel-Plötz (1982) regarding the German language, and Robin Lakoff (1973) regarding US English. The opponent position argues that MG forms are unrelated to gender and purely grammatical. Existing disparities are regarded as caused by social conditions and impervious to being influenced or changed by language. This position is described in Martyna (1980) and Blaubergs (1980) for English, and in Burkhardt (1985) for German. A brief but enlightening outline of the positions and their representatives is given in Stahlberg et al. (2007).

There is less literature on this topic for Spanish, but the opponent positions are basically the same. Jiménez, Román, and Traverso (2011) see language as representing and constructing social realities and as an important element on the way to gender equality, whereas the Real Academia Española (RAE) – the highest authority in language questions in the Spanish-speaking world – states that MG are purely arbitrary and grammatical, and that innovative forms are unnecessary and even ridiculous (RAE, 2006). We took this situation as the starting point for studying empirically the effects of MG and alternative language forms in Spanish. Before describing our own research, we briefly review existing research on other languages.

Empirical Research on Masculine Generics

Along with the theoretical debate on MG and sexist language there has also been some empirical research, mostly supporting the MG-critical position. In most of the experiments on the effects of MG, generic sentences or texts were presented in several versions: one version using MG and one or more versions using alternative language forms (e.g., masculine/feminine slash forms or innovative forms like the feminine form with uppercase “I” in German plural nouns). Then, different methods were used to capture participants’ mental representations of gender concerning the persons the texts referred to. Heise (2000), for example, asked German-speaking participants to write a short story based on the sentences presented before, and to give names to the protagonists, under the pretext of conducting a study on creativity. Results showed that the MG personal nouns (e.g., “Vegetarier”) evoked significantly more male names than female ones, whereas a male/female splitting form (e.g., “Vegetarier/innen”) led participants to produce a balanced number of male and female names. There was also a condition with gender-neutral nouns (e.g., “Kinder”), which evoked a male bias comparable to the MG form. The uppercase “I” (e.g., “VegetarierInnen”) evoked a female bias in the names that participants produced.

In other studies, participants were asked to draw or select pictures of the protagonists in the texts (Sniezek & Jazwinski, 1986), complete sentences (Scheele & Gauler, 1993), or guess the ratio of women in a group (Braun, Gottburgsen, Sczesny, & Stahlberg, 1998). More recently, researchers have also used more implicit measures like reaction times for answering questions, reading texts or other types of processing. For example, Irmen and Roßberg (2004) presented sentences in MG form and measured reading times for the following sentence, in which the gender of the persons referred to either did or did not match the grammatical gender of the preceding sentence. An implicit influence was found with reading times being higher when the protagonists of a text did not match the grammatical gender than when they did.

Findings were quite consistent in showing that MG evoke a male bias in the

cognitive representation of the genders, and that this bias may be weakened by the use of gender-aware linguistic forms. In some studies, neutralizing forms (like the pronoun “they”, “individual”, etc.) showed similar effects to MG (e.g., Heise, 2000), in others they weakened the male bias in a similar way as did other gender-aware forms (e.g., Stahlberg & Sczesny, 2001, Experiment 1; Gastil, 1990). It has been argued that the effect of neutral forms may be especially context-sensitive (Stahlberg et al., 2007). In many studies, a main effect of participant’s gender could be found, in that women generally formed more female associations than men did (Hamilton, 1988; Stahlberg et al., 2001; among others).

Most of the empirical research on the influence of MG language versus gender-aware alternative forms examined English or German-speaking samples. There are very few studies on French (Gygax & Gabriel, 2008; Gygax et al., 2012), some that include data on Dutch (Backer, De Maarten, Cuypere, & Ludovic, 2012), on Norwegian (Gabriel & Gygax, 2008), and some comparing several languages (Gygax, Gabriel, Sarrasin, Oakhill, & Garnham, 2008; Gygax, Gabriel, Sarrasin, & Oakhill, 2009), most of them supporting the findings of studies on German and English. However, checking international publication databases we could not find any empirical study on the effects of gender-aware versus -unaware language forms in Spanish.

It was plausible to expect that the general pattern of findings obtained with other GGL would also apply to Spanish. Like the uppercase “I”, which is specific to German, the Spanish language also has specific forms to avoid MG. One innovative and rather unconventional form is the @-form (e.g. “l@s estudiantes”). The @ is supposed to visually combine the letters o (indicating masculinity) and a (indicating femininity). However, it is probably more easily read as an “a”, so this form may be similar to the German uppercase “I” in that it emphasizes the feminine. A disadvantage of the @-form is that it is not applicable in some grammatical cases. For example, the MG form of “the Spanish” is “los españoles”, the feminine form is “las españolas”, so it would not be logical to use “l@s español@s” in this case. Apart from that, this form is not applicable in spoken language, because there is no practical way to pronounce the “@”.

Another innovative form, which is less used and known, is the X-form (e.g. “lxs estudiantes”, “lxs españolxs”). This form is not pronounceable either, but consistently applicable in written language. The X-form is mostly found in left-wing feminist political contexts, representing a more radical form than the slash form, and also symbolizes a rejection of the normative binary sex and gender system of society (for more theoretical background to this critique, see Butler, 1990). The recommended form in formal guidelines on gender-fair language (Bernal Castro, 2007) is the slash form (e.g. “los/las estudiantes”).

Our Research on Gender(-un)-aware Language in Spanish

In a recent experiment with a Chilean sample, we compared effects of the X-form and the slash form both to each other and to those of the conventional MG form, using Heise’s short-story-paradigm. 195 Chilean university students (83 women, 112 men) with a mean age of 20 years read the beginnings of two short stories about a group of people that were written either in MG form, slash form or X-form (e.g. “El grupo de tres amigxs se encuentra en su bar favorito.” = “The group of three friends meets in their favourite bar.”). They were asked to write a continuation of two to three sentences for each story and to give names to the protagonists. These chosen names’ gender distribution was used as a

measure of participants' gender associations concerning the protagonists.

We expected that the MG form would evoke a male bias in the names' gender distribution by evoking more than 50% male names. We further expected that the alternative language forms would evoke fewer male names than would the MG form. In reference to the findings of Heise (2000), the slash form was expected to evoke roughly 50% male and 50% female names.

Mental Representation of Gender – Main Findings

Our results showed that MG language does evoke a male bias in gender representation, and that the alternative language forms slash and X both do alleviate this bias. An even stronger influence on the gender representation was evoked by participant's own gender, in the way that men generally had a stronger male bias than women. Hamilton (1988) suggested that this could be an effect of a projection of self into the stimulus sentences. However, Silveira (1980) had proposed the hypothesis of a "people = male bias" for both men and women. It claimed that a man is more likely perceived as a person than is a woman, and a person is more likely believed to be a man than a woman. Hamilton (1991) provided clear evidence for this hypothesis with several experiments. He showed, for example, that participants would be more likely to use gender non-specific terms like "person" or "individual" when referring back to a man than when referring back to a woman. Silveira (1980) argued that men's greater bias derives from having learnt as a boy that "the words which refer to himself and which exclude his opposites also refer to people in general", so generic "he" would rather be male than female, whereas girls learn that "words that refer to [their] opposites, [their] not-selves, also refer to people in general" (p. 175). She assumes that girls, in order to compensate for this dissonance, develop strategies to suppress male imagery from MG, whereas boys do not.

Regarding the effects of alternative language forms, our results show that the slash form was closest to 50% male and female names, at least among women. In the male subsample, the slash form also raised the number of female names that participants produced, but did not evoke a 50% equality. Apparently, the gender effect described above is stronger than the effect of the slash form in the male subsample.

Interestingly, the X-form had no significant effect on men, but evoked 50% female names in the female subsample, almost like the slash form. This is not just explicable by the gender effect. From a purely formal perspective, "X" is a neutral letter, neither in its shape nor in its sound does it resemble the masculine-marking "O" or of the feminine-marking "A" (unlike, for example, the "@", which reminds readers of the feminine word form in shape and sound, and might evoke a female bias). Silveira (1980) argues that women, having developed strategies to suppress male imagery from MG, tend to have less people=male bias and less people=self bias than men, so that could be a reason why they interpret the X-form truly generically, whereas male participants, having a stronger people = male bias and people=self bias, tend toward male imagery. The slash form, however, succeeds in weakening this bias even for male readers because it makes the feminine form explicit. Another consideration is that the X has a slightly aggressive character because it questions gender quite offensively. Wherever gender concepts are critically questioned, the male privileges in a patriarchal system are threatened. The X-form could therefore provoke reactance in male readers, leading them to reject this language form, and to react by (consciously or unconsciously) choosing fewer female names than in the slash condition.

Implicit Aspects of Gender Representation

In most of the research on the effects of language form done so far, rather explicit measures were used to capture participants' cognitive representations: Writing stories, answering questions, drawing pictures, etc. are conscious processes, and it is possible that participants answer in a socially or politically reflected way. It would thus be of interest to use more implicit measures in order to find out about the effects of language forms on a less conscious level. In a different context, Bohner et al. (1998) had used ambiguous word fragments that could be completed either in a gender-related or in a neutral fashion, to detect the cognitive accessibility of the gender concept.

According to feminist language critique, MG represent a socially dominating male norm. Alternative language forms break with this norm and point out the dissonance between the usual MG word form and the actual gender of the persons referred to. It is probable that this draws attention to gender ratio and gender in general. If that is the case, we may assume that alternative language forms increase the cognitive accessibility of the gender concept compared to the MG form. More specifically, these forms may increase the relative accessibility of the concept of femininity (vs. masculinity). Based on these considerations, we also employed an implicit measure of construct accessibility by using ambiguous word fragments in the above-mentioned experiment in Chile. After having read sentences in MG form, slash form or X-form, respectively, participants were asked to complete, as quickly as possible, word fragments that had more than one possible solution. For example, the fragment "H__J__" could be completed as HIJO (son), HIJA (daughter), or HOJA (leaf). The completions made by participants were later classified as "masculine", "feminine", or "neutral" completions. A higher number of "feminine" or "masculine" completions was supposed to indicate a higher instantaneous accessibility of the concept of gender.

Unfortunately, our analyses showed that the word fragment measure did not fulfil conventional standards of reliability. Although we did find a small effect of participant's gender, with female participants producing more feminine word completions than male participants, there was no clear effect of language form.

Despite this, we are confident that the method of word completions could work as an implicit measure in future research. In the case of this first study, the method may just not have been sensitive enough. This may be because we used a relatively small number of stimuli and did not control for the frequency of use of the possible solutions. Although it is difficult to construct word fragments with gender-specific and neutral solutions that are equally frequent, this aspect should be explicitly addressed in the construction of future implicit measures. Furthermore, in future analyses the word completions should be weighted according to their word frequency.

Another idea is to use fragments of names that can be completed both to a male and to a female name, instead of (or in addition to) abstract terms or objects. Thus, the possible completions would probably be more equally frequent, and they might reflect more closely the cognitive representations of people. With this method it would not be possible to capture a general concept of gender, but more specific representations of femininity and masculinity. In any case, we believe that further research on the impact of language form on an implicit level would be of great interest, and other implicit measures, such as ambivalent pictures or eye-tracking experiments, could be useful. For an overview on implicit measures, their underlying theoretical rationales and advice on implementation in research, see Wittenbrink and Schwarz (2007).

The Influence of Sexist Attitudes

Finally, one could assume that participants' level of sexism as well as their attitudes toward MG and alternative language forms could affect the results. There are different measures of sexism. An internationally validated measure based on a theoretically profound concept is the Ambivalent Sexism Inventory by Glick and Fiske (1996). Having recognized that a uni-dimensional approach to sexism cannot capture its subtle and complex different aspects, they constructed a measure with two positively correlated subscales: hostile sexism (HS), representing an antipathy against women (and especially those women who do not conform to traditional roles), and benevolent sexism (BS), capturing more subtle, and seemingly positive, stereotypical attitudes toward women, which are nonetheless sexist because they restrict women to certain roles and images, and contribute to keeping women subordinated. Both aspects of sexism go together and the two subscales HS and BS form a general measure of ambivalent sexism (AS). Attitudes toward gender-aware language (AL) are a less commonly used measure, quantifying a person's liking for innovative language forms regarding gender-relations and their consciousness for gender inequalities in language.

In the Chilean experiment, both AS and AL were reliably assessed, but none of them was associated with the representation of female and male protagonists, nor did it moderate the effects of gender(-un)-aware language on those representations. It therefore seems that the effect of language form may be quite independent of people's personal attitudes. This could be interpreted as being in line with the position of feminist language critique that the male bias evoked by MG emerges because MG are often interpreted in a sex-specific way, in spite of people knowing that they are generic (for further evidence, see Gyga et al., 2009).

Conclusion

Our recent experiment on Chilean Spanish replicates previous findings that MG language evokes a male bias in gender representation, and that alternative language forms weaken this bias. A strong gender effect was found, too. On the implicit measure, participant's gender evoked a small effect, whereas language form did not. However, the operationalization of this measure was not sufficiently reliable to draw firm conclusions yet. Sexism and language-related attitudes, despite being measured reliably, did neither directly affect our gender representation measures, nor did they moderate any of the observed effects.

Based on these results and the preceding studies on other languages, we would strongly recommend the conscious and consistent use of gender-aware language in every possible context. In Spanish, the slash form seems to be the form that comes closest to an equal representation of the genders, so it is the recommendable form in most cases. The X-form had evoked similar effects, but only in the female subsample. According to Silveira's (1980) argumentation (see above, "Mental Representation of Gender - Main Findings"), women interpret the X-form truly generically, because they have less of a people=male bias and less of a people=self bias than men do. It would be interesting to find out if people who are generally more aware of the issue of gender representation in language and reflect their own position in the gender-system more consciously would show smaller people=male and people=self biases than average. If so, the X-form might be more appropriate in those contexts.

Concerning further research questions, we would like to point out that there is very little research on effects of MG other than on cognitive representations. Two experiments by Vervecken and Hannover (2012) showed that speakers who used gender-balanced forms in German were perceived to be more competent and less sexist by others. A couple of studies have examined the impact of language form in the labor context, such as Bem and Bem (1973) and Stericker (1981), who showed that women reacted less to job adverts presented in MG than in alternative language forms. Hamilton, Hunter, and Stuart-Smith (1992) examined the legal context and found that participants acknowledged less often that a fictive woman accused of murder could claim self-defense, after they had read a definition of self-defense in MG language than in alternative language forms. We are convinced that gender (un-)-aware language has an impact on many more aspects of everyday life. For example, there is no research to date on how language form may affect speakers' or listeners' affect. We think that it would be especially interesting to examine if MG has an effect on self-related attitudes and feelings like self-esteem or striving for autonomy. It is possible that effects on this more affective level only appear after a longer time of confrontation with alternative language forms, which could only be observed by longitudinal designs.

Obviously, the conclusion from the present study, in the context of previous research, is that *language matters*. However, it is also obvious that language forms and rules alone will not change a system of male dominance that has a history of thousands of years. If there is no woman in a ministry, a supreme court, or a management board, speaking of "los/las ministros/as" (the ministers), "los/las jueces" (the judges), or "los/las gerentes" (the managers) will not miraculously make one appear there. But it will call attention onto this disparity, it can denounce inequalities and inspire people to dare the change. And for this purpose it is absolutely justifiable and even useful that gender-aware language may be unfamiliar to our ears and eyes, sometimes complicated and annoying, or provoking controversies. As long as we face inequalities, discrimination and oppression, we need to stand up against them, we need to reflect our own privileges and practices, we need controversies. And we need language to talk about it.

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Christiane Kaufmann

Fakultät für Psychologie und Sportwissenschaft

Universität Bielefeld

christiane.kaufmann@uni-bielefeld.de