Research on Content Analysis of Textbooks and Teaching Materials in Respect of Stereotypes

Executive Summary

A. RESEARCH PROJECT BRIEF

In October 1999, the Equal Opportunities Commission commissioned the Centre for English Language Education and Communication Research, City University of Hong Kong, to conduct "Research on Content Analysis of Textbooks and Teaching Materials in Respect of Stereotypes". The major focus of this project is the examination of the nature and extent of stereotyping in printed educational materials, including textbooks and examination papers. This has been achieved through content analysis of such materials. The major areas of stereotyping concerned include gender, age, disability, single-parenthood and ethnicity. A selection of the materials was subjected to extensive linguistic analysis to further reveal patterns of stereotyping not accessible through content analysis. The perception of various stakeholders of stereotyping in educational materials was examined through a questionnaire, focus group interviews and structured interviews.

B. MULTIPLE METHODOLOGIES

1. A distinctive feature of this study is the employment of a number of inter-connected research methodologies. The integration of a range of different analytical methods, each of which contributes its own perspective to the overall study, provides a comprehensive account of stereotyping in educational materials.

2. Five methodologies have been employed in this study, employing a combined range of qualitative and quantitative methods:
   - I Content Analysis of Selected Texts
   - II Linguistic Analysis of Selected Texts
   - III Focus Group Discussion
   - IV Survey Analysis of Teachers' Perceptions
   - V Analysis of Structured Interviews

C. SUMMARY OF FINDINGS

I   Content Analysis of Selected Texts

1. Content analysis provides an objective, quantified description of the frequencies of occurrence of selected social groups and attributes associated with them in the sampled educational materials. Occurrence is determined through the quantification of images (pictures, illustrations, photographs) and uses of language (words and phrases/characters). In this study some 69,957 distinct references to mostly human characters were coded from the entire corpus of 289 textbooks and examination papers. The analytical framework allows for the identification of four independent variables (subject, level, publisher and mode), five major dependent variables (gender, age, disability, ethnicity and single parenthood and childhood) and a range of further dependent variables. The framework further allows for the identification of stereotyping in one or more of the above areas both actively (by overt reference) and passively (by covert, or lack of relevant references). The framework also enables patterns of stereotyping to be revealed through analysis of co-variation. The database is extensive enough to allow for further analysis of co-variance among the variables beyond those reported in this study.

2. Stereotyping by Subject Area

    2.1.   Gender: Female characters appear less often than male characters but the extent to which this occurs varies considerably from subject to subject. The variability is such that Subject does not predict the extent of dominance of male over female characters, nor vice versa. Non-genderised characters appear more frequently than genderised characters except in Chinese History materials. The extent of the dominance varies from subject to subject. The variability is such that Subject does not predict the extent of the dominance of non-genderised characters.

    2.2.   Age: Old characters appear less often than younger characters in every subject except Economics and Integrated Sciences, where the number references to the two groups are equal. Overall, Age does not predict Subject, nor vice versa.

    2.3.   Disability: Characters with disabilities appear in every subject, but there is a greater number and variety of their appearance in some subjects compared to others. Overall, their appearance constitutes less than 0.1% of the total number of characters in the corpus (n=73).

Given the small numbers involved, the apparently strong link between Subject and Disability must be interpreted with caution.

2.4. Ethnicity: The balance of characters of different Ethnicity is highly variable across different Subjects, just as the number of references to Ethnicity is variable across Subjects.

3. Stereotyping by School Level
3.1. Gender: Female characters appear less often than male characters but the extent to which this occurs varies considerably from level to level. The dominance by male characters is generally much greater in secondary compared to primary school level materials, although a predictive relationship does not exist between the two variables. Non-genderised characters tend to dominate in secondary school level materials while genderised characters tend to dominate in primary school level materials. The interaction between Genderisation and Level is significant, although the associative relationship is not particularly strong. There is little or no predictive relationship between the two.

3.2. Age: Old characters appear less often than younger characters at every Level but there is no systematic difference between primary and secondary school level materials in this regard.

3.3. Disability: Only physical disability is featured in primary school level materials whereas in secondary school level materials, physical disability as well as sensory impairment, developmental disability and disability of an unspecified kind are represented. There are 35 and 38 references to disability in primary and secondary school level materials respectively.

3.4. Ethnicity: The balance between characters of different Ethnicity is highly variable across different Levels, just as the number of references to Ethnicity is variable across Levels. Unlike Subject, Level does not predict Ethnicity, nor vice versa.

4. Stereotyping by Publisher
4.1. Gender: Female characters appear less often than male characters but the extent to which this occurs varies considerably from Publisher to Publisher. The variability is such that Publisher does not predict the extent of the dominance of male over female characters, nor vice versa. Non-genderised characters tend to dominate, although the pattern is reversed among materials from four publishers. The extent

of the domination varies quite considerably from Publisher to Publisher. The variability is such that Publisher does not predict the extent of the dominance of non-genderised characters, nor vice-versa.

4.2. Age: Old characters appear less often than younger characters in the materials from every Publisher except for three. Of these three exceptions, the number of old and younger characters is equal in materials from two publishers while materials from one publisher only feature old persons. Overall the balance between references to the two Age groups is highly variable across Publishers.

4.3. Disability: While there is no simple pattern, there is both a strong associative and predictive relationship between Disability and Publisher.

4.4. Ethnicity: The balance between characters of different Ethnicity is highly variable from Publisher to Publisher. Like Subject, Publisher predicts Ethnicity to a small degree.

5. Stereotyping by Mode
   5.1. Gender: Female characters appear less often than male characters in the visual mode, and this appearance is even more significantly reduced in the written mode, although neither variable predicts the other. Non-genderised characters tend to dominate in the written mode while in the visual mode, genderised characters are significantly more prominent. The interaction between Genderisation and Mode is significant, and the associative relationship is quite strong. There is a moderate predictive relationship between the two.

   5.2. Age: The number of old and younger characters is equal in the visual mode while old characters appear less often than younger characters in the written mode. Neither variable predicts the other.

   5.3. Disability: Characters with disabilities occur more frequently and in greater variety in written materials when compared to visual materials. Only physical disability is featured in visual materials, with one depiction of an unspecified disability. In written materials there are also references to sensory impairment and developmental disability.

   5.4. Ethnicity: There are generally more written references than visual depictions within each category of Ethnicity. However, Newly Arrived Chinese and "Others" are not depicted visually at all, while there are more depictions of, than references to, South Asians.

6. Stereotyping Involving Other Dependent Variables

    6.1. Family Role: There is evidence of stereotypical representation involving family role and genderisation as well as family role and gender. Specifically, the frequency of occurrence of givers as opposed to recipients of care is related to gender and to genderisation. The former relationship is mediated by subject area and school level while the latter is mediated by school level and mode of presentation. Another aspect of family role, the monetary as opposed to the non-monetary nature of care given or received, is not related in any way to the major dependent variables.

    6.2. Occupation: The frequency of occurrence of blue collar as opposed to white collar workers is related to gender, age and ethnicity but not to genderisation. These relationships are all mediated by subject area, school level and mode of presentation except in the case of age.

    6.3. Economic Status: The frequency of occurrence of economically active characters is related to gender, genderisation, age and ethnicity. Subject area mediates all these relationships while school level does not where genderisation and ethnicity are involved. Mode mediates all the relationships except where ethnicity is involved.

    6.4. Interest: The frequency of occurrence of different categories of interest is related to gender and to genderisation. Subject area, school level and mode of presentation mediate the relationship between genderisation and interest while no such influence exists for the relationship between gender and interest.

    6.5. Attire: The frequency of occurrence of characters in dresses as opposed to pants is related to gender, genderisation, age and ethnicity. Interestingly, the relationship between ethnicity and attire is statistically significant when Chinese characters are compared with non-Chinese characters, but not when Chinese characters are compared with Caucasians. Subject area, school level and mode of presentation all mediate the relationship between genderisation and attire, while only subject area and school level mediate the relationship between age and attire.

    6.6. Social Status: The frequency of occurrence of positive as opposed to negative social status is related only to genderisation, but not to gender, age or ethnicity. Subject area, school level and mode of presentation all mediate the relationship between genderisation and social status.

6.7.   Achievement: Where references are made to achievement, the frequency distribution across categories of gender, genderisation, age and ethnicity is skewed. Moreover, subject area relates to genderisation and ethnicity but not to gender and age. School level is only related to gender while mode of presentation only to gender and ethnicity.

6.8.   Failure: Where references are made to failure, the frequency distribution across categories of gender and genderisation is skewed. Moreover, subject area is related to both gender and genderisation, while school level is only related to gender.

6.9.   Public Participation: Where references are made to public participation, the frequency distribution across categories of gender, genderisation and age is skewed. Only the mode of presentation is related to genderisation.

II   Linguistic Analysis of Selected Texts

1.   Linguistic analysis studies how language use may reflect stereotyping. Linguistic analysis examines words, phrases, clauses, dialogues and narratives. As language can be used metaphorically, it is also important to study how such figurative uses of language may reflect stereotypical attitudes and beliefs. It provides a complementary research method to that of content analysis.

2.   Linguistic analysis is crucial to research into stereotyping in that in addition to providing quantitative information on how characters are referred to, its tools allow speculation to be made on the relationships between characters (who does what to whom) and the relationships between characters and material objects (who stands in which relationship to what). Linguistic analysis also focuses on the contextual meanings of individual clauses, that is, the environment in which particular grammatical stretches of language occur. In short, it enables an exploration of the issue of stereotyping as it is manifested through linguistic choice or discourse structure. In this study six areas of linguistic analysis are explored:
    ■   Frequency of occurrence as manifested through language forms and collocations;
    ■   Generic nouns and generic pronouns
    ■   Metaphors
    ■   Transitivity
    ■   Turn-taking and interactions
    ■   Narratives

3. Frequency of Occurrence
   3.1. Gender: The data show more male references than female references as indicated through pronouns, possessive pronouns, reflexive pronouns, nouns, titles and first names in the selected texts. In the sub-corpus analysed, there are altogether 2,591 occurrences of male reference against 1,685 occurrences of female reference. The ratio of male to female is approximately 6:4.

   3.2. Ethnicity: Textbooks only include a few countries, nationalities and ethnicities in their texts. In the sub-corpus analysed, Europe is mentioned 35 times, America 16 times, Asia 10 times, Australia only once and there is no reference to Africa at all. Only a few nationalities are included: Chinese, British, French and American. Filipinos and Filipinas are not mentioned in the selected texts at all, despite their numbers in Hong Kong. Only a few cities are included: Hong Kong, Beijing, Shanghai, London, Paris and Chicago. The word "mainland" only occurs twice. Most Asian countries are absent except for Japan. Most countries mentioned are developed countries and the cities are mostly large metropolitan centres.

   3.3. Disability: The word "disabled" only occurs five times in the sub-corpus analysed while the word "disability" occurs only twice. There are no other references to disability.

4. Collocation
   Gender relationships: Amongst these seven pairs of gender relationships, that is, *boy:girl; brother:sister; dad:mum; father:mother*; *he:she; man:woman; men:women*, only one pair shows that the male co-occurs more with the female (*father:mother*), one pair shows the co-occurrence is similar (*dad:mum*). The remaining five pairs show that the female co-occurs more with male. This indicates that when females occur in texts, males are more likely to occur in those texts. However, when males occur in texts, females are less likely to occur in those texts. From this it may be concluded that females in texts are more dependent on males than they are in a balanced relationship.

5. Generic Nouns, Pronouns and Marked Forms
   5.1. English Language Teaching textbooks in general, though not all, do not use generic nouns, such as using *humankind* instead of *mankind*, or using *police* instead of *policemen*. In contrast, Chinese History textbooks tend to use many generic nouns. One reason for this may be that such terms are historical and "frozen" in their meanings. Chinese

accounts of Chinese history have typically excluded women and have traditionally used gender-embedded terms.

5.2.   As regards pronominal usage, the words *man-* and *humankind* in Chinese share the same pronoun while *female* has its own pronoun. Thus, stereotypicality is embedded in the language. English language textbooks tend to refer to persons whose gender is unknown as *he/she*, rather than *he*. The generic pronoun *he* seems to be regularly used in English language textbooks to refer to a small number of professions, for example *President, sportsperson, farmer* and *thief*. In Chinese-medium materials, the pattern appears to be that one pronoun character is used for professions that have traditionally been male dominated, and another pronoun character for professions that have been traditionally female dominated.

5.3.   As regards the use of marked forms, (that is, affixes used to refer to women, persons with disabilities, old persons, ethnic groups, which give the impression of deviations from some norm – for example in English the use of *-lady, ette, -ess*) there are some examples in the English language materials. There is also particularly marked identification of women as being in some way unusual, such as "*the conductor was a woman*". Similar examples exist for old persons.

6.   Metaphor
6.1.   Metaphors allow for understanding of how persons relate to each other and to their social worlds.

6.2.   There are several examples in English language materials and in Chinese language materials where men are said to be *explorers, chief designers, fathers of history, fathers of a country, saint-heroes, persons of strength*. There is only one example where a woman is said to be a *star*. *Idioms* typically encode genderised relationships, for example men being associated with *courage*, old persons, women and children being associated with being *weak*. *Personification* of characters is also typically genderised, especially in Chinese language materials, though this also occurs to a lesser degree in English language materials. For example, *cloud* is personified as female (*cries, causes rains*), and strong and powerful objects (*wind, storm and lightning*) are personified as male. In terms of *similes*, genderisation also occurs with men being said to be like *monkeys, lighthouses, cheetahs* and *magicians* and females as *grapes* and *angels*.

7. Transitivity
   7.1.   The study of transitivity helps to shed light on the relationship between characters, supplementing the focus of content analysis on the separate identity of each character or feature.

   7.2.   The illustrative examination of transitivity shows that in terms of material processes, both genders are shown to engage in *sports games*, *leisure activities* and *"move around" actions*. Both genders seem to possess *material goods, fine qualities*, and receive *honours* and *praises* in a fairly distributed manner. Females seem to be portrayed in a positive way more often than their male counterparts. Females and males perform as initiators of utterances more or less equally. However, women are sometimes portrayed in a stereotypical manner, especially in terms of behavioural processes. Women are said to *cry*, *behave strangely* and *not be able to help eating.*

   7.3.   What is more disappointing overall is the portrayal of persons with disabilities and old persons. Persons with disabilities appear only twice in this sample corpus where they are placed in a more passive position than other social actors, are said to be *needing support and help* from others. It seems that persons with disabilities are always portrayed as in *need of help* and not shown performing as fully functioning social actors. For old persons, they are assumed to be physically less capable than others. They are *fit to play sports* but this is *rare*; they *fall on the ground;* they are said to *sleep in the afternoon.* It seems that the representation of old persons is determined by a stereotypical perception of age-related behaviour.

8. Turn-taking and Interaction
   8.1.   How dialogues are constructed in texts can display stereotypical features. For example, the social roles or discourse roles played by participants may not be well-distributed, the amount of talk accorded to different participants may not be equitable, participants may differentially initiate conversations, topics may not be equitably distributed, the functions that people mean by what they say may not be well-distributed across types of participant.

   8.2.   From a sub-corpus of 1,212 utterances and 257 dialogues drawn from English medium and Chinese medium texts, the following results are found:

      8.2.1.   Visibility of the Social Group
               If the category *gender unknown* is removed women and men are broadly equal in their visibility. In terms of other social

groups, there are only two (0.38%) old persons involved in all dialogues. The only ethnic group explicitly referred to is Caucasian. Persons with disabilities and single parent families are not explicitly referred to at all.

8.2.2. Topics of the Dialogues
Both genders engage fairly equally in dialogues concerning *complaints*, *formal discussion* and *general conversation*. Women seem to *make inquiries more*, *talk on the telephone more* and *make more transactions*. Men are *more likely to interview others* and *to be interviewed* than women. Both women and men are shown *in public domains* even though they engage in different forms of interactions: women are shown to *make more transactions* (as both *service providers* and *customers*) and men are shown *to interview* and *be interviewed more*.

8.2.3. Social Roles in the Dialogues
Gender is associated strongly with the social roles played by participants. While Gender alone predicts Social Role to quite a large extent, the converse is not true. Together with the results shown in genderised topics in dialogues, women *engage in transactions* much more than men, as they are also more likely to work in the service industries than do men. Women play *customers* much more than men, men are more likely to be *reporters* and *journalist*s. In terms of family role, in spite of the small figures, women are more likely to play traditional family roles of *daughter* and *mum* than do men (*son, dad*). Almost all participants, regardless of gender, play the role of speaker rather than listener. This is in keeping with the oral practice role of dialogues in classroom work.

8.2.4. Main Function of the Utterance
Gender is moderately associated with the Function of the utterance. Both genders use conversation for *initiating* and *orienting* and *providing emotional support*. Interestingly, women are more likely than men to *give information*, to fine-tune conversation through *elaborating, evaluating, clarifying* and *summarising*, and to *make commands*. Men use conversation to *seek information* more than women do. Gender and Function are mildly predictive of each other.

8.2.5. Adjacency Pairs in the Workplace
Gender appears to be mildly related to the use of Adjacency Pairs at work. Both women and men participate fairly in the

range of types of Adjacency Pairs although women are more likely to engage in *question-answer* types of interaction and men more in *invitation* types. Gender and Adjacency Pairs do not predict each other.

8.2.6. Order of Turns
Gender is mildly associated with order of turn. Men are more likely than women to *elicit interactions* and women more likely to *respond to an elicitation*. Men are more likely to give dispreferred answers than are women, that is, they are more likely *to decline an invitation or offer*, *justify a complaint* and *reject a request*. It may be said that men take on a more pro-active conversational role than do women.

8.3. Overall, the visibility of the genders is fairly distributed, and although there are differences in participation across various types and forms of discourse, topics, roles, functions and organisation of turns, both genders are shown to engage in interactions fairly. The professions and jobs in which men and women engage are still, however, depicted in a traditional and stereotypical manner.

8.4. Echoing the findings from content analysis, and other sections of the linguistic analysis, old persons, single parent families and persons with disabilities are almost invisible. Ethnic groups are very limited in their representation. The only ethnic group present in the sub-corpus of English Language Teaching materials examined is Caucasian. Accordingly, students will have limited or no exposure to other ethnic and linguistic groups who speak English as a first/second language, many of whom are widely present in Hong Kong

9. Narrative Analysis
9.1. Narrative analysis complement the above linguistic studies by examining the story themes that are manifested through language. The ways that stories are told to children follow a stable and conventional pattern. This pattern defines and reinforces social relations - family relations in particular. The roles of the characters and the relations among them may correspond to social expectation – that is, students can recognize the roles and the relations without much difficulty. Stereotyping is a means to enable ease of recognition. Although stereotyping can work positively in the sense that students can learn languages within their existing world knowledge, it also inevitably reinforces particular social relations. Further, it works to limit social relations to a few types and helps legitimate these few types. The materials selected for linguistic analysis deal chiefly with

family relations. Ethnicity and disablement did not feature in these selected texts.

9.2. Descriptive Narrative
Data from selected English Language Teaching and Chinese medium textbooks indicate that materials vary between reinforcing traditionally gendered family roles (in some Chinese materials) and a more balanced distribution of family roles (in some English Language Teaching materials), although old persons appear, stereotypically, as less active and productive. Only one example shows a younger girl taking the initiative herself.

9.3. Moral Narrative
The teaching of morals is common in Chinese medium textbooks. Of interest here is who is represented as teaching children this moral knowledge. Typically, this role is accorded to male family members, although even here there is a gendered distribution in that men teach children and grandchildren how to behave morally *outside* the home, while women focus on appropriate behaviour *within* the home.

9.4. Knowledge Narrative
Male family members typically teach children about the world. Men serve as a knowledge bank about *world knowledge*; *science, geography*, how to *perform real world tasks* and so forth. Women appear to teach *relationship knowledge*, that is, about *interpersonal relationships*.

9.5. Problem-solution Narrative
These narratives typically address what students can do to help family members. The problems faced are largely stereotypically distributed. *Grandfathers*, *mothers* and *children have problems*, *fathers* typically do *not*. Where fathers do, they are associated with *work*, and mothers with *housework and the home*.

III Focus Group Discussion

1. Focus group interviews provide a perspective on the perception of stereotyping complementary to that afforded by the use of questionnaires. Specifically, it is through the conducting of focus group interviews that the opinions of various participants can be recorded, extracted, highlighted and interpreted. The rationale is to obtain as diverse a range of opinions as possible, rather than to gauge the relative popularity of a narrow range of opinions. Although opinions obtained from such focus groups do not lend themselves to generalisation in the manner of quantitative accounts, they

nevertheless provide in greater detail important variety to the understandings of stereotyping.

2. Primary School Student Drawings
    Students are provided with story themes for which they have to draw pictures. They are responsive to non-traditional gender roles, though there is some linking of depicted roles to the gender of the student concerned. There are signs that students are prepared to depart from the storyline of the stimulus in the light of their own experiences at home.

3. Primary School Student Stories
    3.1   Responses vary according to whether students like the stories or not. Again, students' own experiences are a major factor in determining awareness of stereotypicality of roles. For example, where students know of men who undertake household chores, this affects their awareness of the traditionally gendered distribution of such roles.

    3.2   Lack of contact with persons with disabilities again affects students' willingness to identify with, or indeed to know much about, characters with disabilities in stories, though there is some small evidence of a friendly disposition to blind persons.

    3.3   Old persons are seen as *needing assistance*, and, to some extent, needing to respond favourably to such assistance. This is in itself a marker of how old persons are traditionally stereotyped, as the linguistic analysis above also shows.

    3.4   Immigrant children from the Chinese mainland are generally negatively regarded, with students seeing no necessity to help them out, although some students remark on "nice" immigrant children they know while regarding them as curious because of their *language and accent*.

    3.5   Divorced women are generally viewed as *ill-tempered* and, where students dislike the story, seen as *miserable* and having *psychological problems*. Children of single parents are often regarded as *objects of ridicule*.

4. Secondary School Student Drawings
    4.1   Where blind persons appear they are depicted as *needing assistance*.

    4.2   Old persons, especially women, appear to be traditionally stereotyped by their *posture* and *dress*, and also as *needing assistance*. This latter perception may be due to feelings of respect which students feel are owed to old persons.

    4.3   Immigrant children are identified as *different* and as *"other"* either by their appearance or by their dress. They are depicted as *needing assistance*, and may be *mocked*.

5. Secondary School Student Stories
    5.1   Persons with disabilities may be evaluated as *lacking enthusiasm* and *confidence*, although there is some recognition of the difficulties they face, especially women with disabilities, and as such they can also be *admired*. Students generally have little personal experience of persons with disabilities.

    5.2   Notable women (for example Lee Lai San) are to be admired, especially if they go against stereotypical perceptions of what are perceived as female *"limitations"*. Those women who engage in activities *outside the domestic world* are to be admired.

    5.3   *Conscientiousness* is widely seen as a desirable quality, possible to be possessed equally by both genders, and by the rich as well as by ordinary citizens.

6. Views of Primary and Secondary School Teacher Groups
    6.1   There is clear awareness of gender stereotyping. But there is also a need to contextualise such stereotyping in relation to the subject matter of the materials, rather than to treat it as an absolute. This is especially so in relation to the representation of historical and social change in attitudes and practices over time. Fact needs to be distinguished from (covert) opinion. Nonetheless, it is felt that history materials could make more reference to the achievements of women, and much would depend on how teachers deal with such materials in class.

    6.2   It is felt that *role and task distribution* among men and women, or among old and younger persons, could not be seen in absolute terms but needs to be appraised in relation to a person's age and strength.

6.2.1 There is some feeling that materials should reflect the actual *distribution of tasks and roles* among genders in contemporary Hong Kong, and as such should portray doctors as male and nurses as female, mirroring reality.

6.2.2 Educational materials are recognised as having changed over the years in their representation of gendered roles. It is thought that such gendered role distribution in language teaching materials in particular may be a consequence of having to find ways of including a range of prescribed vocabulary items. There is a feeling that younger children would not be aware of stereotyping, and that students do not on the whole object to stereotypical representations of family roles. Nonetheless, sharply stereotypical materials are recognised as such. Imbalances in family role distribution are recognised as needing attention, and could be justified by a growing sharing of roles among families in Hong Kong, and by the contribution of women to the economy, both in work and at home. It is felt that working women should be shown more often and the support of female domestic helpers in Hong Kong should be acknowledged. Materials frequently show women as being associated with particular emotions. It is felt that stereotypical use of language (for example in pronominal usage) can be countered by teachers in their classroom presentation.

6.3 There is general agreement that the portrayal of *non-Caucasian characters* (for example, Africans) is highly topic dependent. They could be seen either as *needing aid*, or as *excellent athletes*. In this sense it can be said that educational materials maintain traditional negative and positive stereotypes.

6.4 Where they appear (which is rare), *persons with disabilities* are *never* seen as *making an active contribution* to society. Blind persons, in particular, are normally seen as *needing assistance*.

6.5 It is argued that the lack of representation of persons with disabilities in textbooks may be due to an unwillingness of such persons to allow themselves to be so represented, such as in photographs. Teachers may also be unsure how to deal with discussions of disability in class, especially if this may offend children who are familiar with disability through their family members or friends.

6.6 Teacher Actions in Class: It is felt that there should be a greater balance in pronominal reference and a use of gender-free language

especially in English and Social Studies. Some teachers think that discussion of stereotyping in class may not be necessary as students are aware of the issues. Others think it best to avoid such discussions in relation to gender issues for fear of generating friction among male and female students. To that extent it is felt that it would be "safer" to discuss ethnicity and disability. However, it is thought such discussions are needed where there is ignorance, prejudice or insensitivity, but rely on teachers and students having personal experiences which could be tapped into. Discussions on such topics would then be difficult where these may arouse highly personal experiences and recollections among students. Holding such discussions may also affect the ability of teachers to complete the set work for the class. Nonetheless, some teachers think that having good counter-examples to present in relation to issues of stereotyping is an important part of the teacher's work and class-work could be supported by all-school discussions on civic and moral education and the promotion of core values.

6.7   Teacher Education: As regards teacher education, none of the teachers in the focus groups have received any formal training on the treatment of issues of stereotyping and discrimination in curricula or in classroom practice, although for some teachers such issues have featured in extra-curricular non-teacher education courses they have taken. It is felt that formal training would be welcomed where teachers are not already personally aware of the issues involved. Transferring such training into classroom practice is, however, difficult and more professional development and in-service education should be devoted to this topic.

IV   Survey Analysis of Teachers' Perceptions

1.   The questionnaire serves to provide a perspective on the perception of stereotyping by teachers complementary to that afforded by the focus group interviews. The questionnaire perspective allows quantitative or numeric data to be generated while the focus group perspective yields rich qualitative data in the forms of opinions expressed, detailed description and explanation. Both perspectives are necessary in building a more complete picture of stereotyping in Hong Kong educational materials. Taken together, both modes of analyses of teachers' perceptions augment the content analysis of textbooks and the corresponding linguistic analysis.

2.   The first section of the questionnaire is designed to assess teachers' perceptions of the extent of stereotyping in the materials they use in class as

assessed against the results of the content analysis of these textbooks. Teachers' ratings are calibrated against their expected ratings from the content analysis.

3. Observations concerning discrepancies between the two sets of ratings in respect of questions asked can be summarized as: (i) the extent of stereotypicality and counter-stereotypicality in textbooks is not always perceived by the teachers who use them; (ii) the teachers sampled both overestimate and underestimate it; and (iii) it is nonetheless perceivable in each of the areas of gender, genderisation, age, disability and ethnicity.

4. Possibly due to the operation of preconceptions and expectations, teachers appear to have stereotypes of stereotypes, especially with respect to single-parenthood and aspects of ethnicity, which can almost be completely absent from textbooks. Whereas there appears to be very little awareness of age stereotyping among the teachers sampled, there is a general awareness of disability stereotyping. Gender is generally assumed to be represented in a balanced way, while primary school teachers tend to have a better grasp of the degree to which textbook characters are genderised than secondary school teachers.

5. Teaching experience is a fairly accurate but nonetheless imperfect predictor of responses to some of the questions. Not surprisingly, no one-to-one relationship is found between teaching experience and the responses. Much of the same applies to the gender of the respondent, although the predictive power of this variable is not as strong as that of teaching experience. The inability of either variable alone in predicting the responses is indicative of the multidimensionality of the factors influencing the perception of stereotyping in textbooks.

V   Analysis of Structured Interviews

1. Consultations were held with a range of publishers and educational organisations involved in the development and approval of educational materials, including textbooks, examination materials, and audio-visual educational programmes. The purpose was to assess the awareness of the organisations concerned of the general issues raised in the Project, and to gauge the extent to which staff were already engaged in addressing issues of stereotyping in relation to the educational materials they were either responsible for producing or are involved in evaluating. At the same time, these consultations were also fora to test reactions to a draft set of proposed

guidelines for the avoidance of stereotyping in educational materials (*the proposed Guidelines*)[1], and to modify these *proposed Guidelines* in the light of these discussions.

2. There is general support among all those individuals and groups consulted for the introduction of proposals to counter stereotyping in educational materials. The aim of such proposals is to achieve an appropriately illustrated balance of representation of different communities and interests. It is important, however, to ensure consistency, while respecting cultural values, appropriateness to local conditions and contexts, and reflecting differences among various audiences.

3. It is hoped that a set of guidelines for avoidance of stereotyping could be developed jointly or severally by stakeholders. The guidelines would serve as a useful guide to equitable practice. They would avoid the arbitrariness associated with individual exercise of judgement. However, such guidelines need to be supported and augmented by staff training, awareness raising, professional development programmes, and more public campaigns. To be effective, any such guidelines have to be operationalisable, and their principles need to be exemplified in particular contexts of the users.

4. Educational Publishers
    4.1. Interview with English Language Publishers
        4.1.1. Publishers of English language teaching materials do not have any formal code of practice in place for their editors in relation to issues of stereotyping. There is very keen awareness, however, of the importance of avoiding stereotyping in such materials. This is especially the case in relation to matters of gender representation.

        4.1.2. It is felt that issues other than those of gender stereotyping now need greater awareness and more attention of, for example, those associated with *family roles*, *disability*, *ethnicity* and *culture*. For example, old single persons are generally absent from such learning materials, and a greater range of occupations can be included, in appropriately meaningful contexts, with members of both genders and different ages and abilities engaged in different roles in such occupations (*politicians, police, teachers* and so forth). Countering stereotyping is not merely a matter of

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[1] See Part E of this Executive Summary for the proposed Guidelines.

representation, but also one of promoting diversity and tolerance in the matter of displays of morality and of ideological beliefs and attitudes.

4.1.3. Children need to be displayed in the context of equal opportunities within the family, for example, shown as having the ability *to make decisions*, *to offer advice, to solve problems*, and not positioned as merely the *recipients of instruction* or *advice.* There is a tendency for materials to display an *"idealised"* and *"wholesome"* society, imbued by happiness and positive values, peopled by obedient and helpful members.

4.1.4. There is some feeling that in the desirable exercise of careful scrutiny over matters of language in language teaching materials, wider issues of representativeness of participation and other matters addressed in the *proposed Guidelines* may be less highlighted. Achieving a balance of representation in text and visualisation is partly a matter of the English language competence among both editors and illustrators, and there is a need to ensure that this is enhanced.

4.1.5. Publishers feel that conservative attitudes among some school authorities, or among some Teacher Panels responsible for textbook selection, may work against the inclusivity which publishers believe to be important. It is argued that teachers' and school authorities' resistance to more inclusive and balanced materials could have a negative impact on publishers' market share. Greater teacher professional development in the area and themes of stereotyping in educational materials, and the provision of example of best publishing practice, would be a useful counterweight to such attitudes.

4.2. Interview with Chinese Language Publishers
4.2.1. Only one publishing house consulted has a clear in-house policy for its editorial staff in the avoidance of gender discrimination and stereotyping. For others, no formal policy is in place. There is a general perception that the avoidance of stereotyping is not identified explicitly by the Education Department as a core value. Publishers acknowledge that in practice in the process of evaluating textbooks, the Education Department is alert to stereotyping issues, especially in relation to matters of gender and family role.

4.2.2. All publishers believe that a clear statement of policy would be desirable. Clear guidelines would be valuable and would be found acceptable. They could be used for in-house guidance and training but would need to be interpreted in terms of the local social circumstances of Hong Kong.

4.2.3. Discussions with the Chinese medium publishers are useful in bringing a number of conditioning factors into account in the determining of future guidelines. These are listed below in summary form:
a) *On the representation of social roles:*
  ➢ Historical accounts will necessarily reflect the social structure of the age; accordingly, bias and stereotyping is historically reflective.

  ➢ The distribution of gender-differentiated roles may need to reflect the worldview and degree of social awareness of the students. For kindergarten pupils, it is suggested, women naturally predominate in their school lives and as such bias reflects such pupils' life world context. It is noted that there has been market resistance to a greater use of male voices in voiceovers for pre-school pupils, their parents and their teachers.

  ➢ Space limitations may preclude a full representation of both sexes in occupational roles.

  ➢ Avoiding obvious gender stereotyping, for example, including the representation of a male nurse in a textbook, may require an explanatory note.

  ➢ Vocabulary lists may make equal treatment difficult – for example, "postwoman" is not an included item. The gender-neutral term "postal worker" may be used instead.[2]

b) *On the representation of diverse cultural/ethnic/social groups:*
  ➢ Although there is a greater awareness of the need to include the different lifestyles, customs and activities of different ethnic and cultural groups in Hong Kong,

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[2] See "*Gender Bias in School Textbooks*", published by Women's and Youth Affairs Division, Commonwealth Secretariat, UK (1995), which contains a useful section on gender-sensitive vocabulary.

it is felt that this awareness has not as yet translated widely into representation in educational materials.

➢ Publishers believe that different school subjects afford greater or lesser opportunities for displaying diversity. Arguably, this is easier to achieve in Social Science textbooks than, say, in books on Chinese History;

➢ It is felt that supplementary materials could be recommended and used more to emphasise this need for diversity, as could internet-mediated material.

c)   *On the representation of old persons:*
➢ Although the appropriate representation of old persons in educational materials is an important issue, publishers feel that this representation is constrained by the life experiences of the pupils and the difficulty of determining what criteria could be used to identify old persons.

d)   *On the representation of persons with disabilities:*
➢ Publishers acknowledge that they have experienced difficulty in obtaining images of persons with disabilities and believe that social service organisations concerned with this section of the community are reluctant to allow such images to be included in textbooks;

➢ There is an acknowledged need to heighten the positive presence of persons with disabilities in textbooks so as to motivate students to adopt a supportive and non-stereotypical attitude to their potential as society members.

e)   *On the representation of family roles:*
➢ Generally, this is felt to be a difficult area. There have been experiences of market resistance from teachers to publishers introducing the subject of divorce or single parenthood in educational materials. It is argued that teachers believe that since, in their view, adopted children, and ethnically mixed parents, are rare in Hong Kong, there is no need for them to be represented in educational materials. However, the increase in migrant children from the mainland in

Hong Kong schools would make their positive and non-stereotyped presence in textbooks increasingly important.

4.2.4. These comments and caveats do not invalidate the appropriateness of the *proposed Guidelines* nor the specifically highlighted features. These features apply equally to Chinese medium publishers and authors as they do to those operating in English medium. The comments above could provide useful topics for discussion in seminars and professional development programmes.

5. The Hong Kong Examinations Authority (HKEA)
    5.1. HKEA does not at present have any guidelines in place but it welcomes the initiative as likely to be useful. HKEA is increasingly concerned about inter-cultural issues, especially following the growth in numbers of Mainland Chinese children coming to study in Hong Kong. There may also be a need to acknowledge other cultural groups long established in Hong Kong, for example from the Sub-Continent of India, Pakistan, Nepal and the Philippines, who have not been hitherto represented in examination materials.

    5.2. In a similar way, issues surrounding the representation of disability, age, single parent families and the employment of older women, that is, from middle-age upwards, may need to be addressed, although HKEA has acknowledged the need for greater representation of old persons. Representation has particular significance in language assessment, especially in relation to any perceived cultural bias in examination or test items.

6. Educational Television (ETV)
    6.1. Programme developers are sensitive to the issues raised in the *proposed Guidelines*, and would welcome its wide circulation. Of particular concern to them is the need to portray children taking active roles in creative problem solving as a counterweight to the frequent prioritising of parents and old persons as initiators of such activity. There may be a stereotyping of children as not capable of lateral thinking and active problem solving.

    6.2. As regards family composition and roles, there may again be a need to represent more accurately the separation of family members as a more common phenomenon in Hong Kong than is usually realised. Children whose parents are separated, for work or other reasons, may

face embarrassment if family role models presented do not apply to them. In a similar way, it is important especially in video materials not to marginalize children in Hong Kong by representing children living in detached houses with gardens as some kind of norm, or indeed, as an aspiration.

6.3.   There is a need to widen the representation of occupational reference so that programmes take in a broad range of workplaces and jobs, and to extend the family and work roles of women and old persons.

6.4.   As regards issues of culture and belief, there is no restriction on portraying a range of groups, providing the overarching principle of plurality and representation is maintained.

6.5.   There is a need for more concerted action between publishers and makers of ETV materials to ensure that children are introduced to that vocabulary which would allow them to understand references to marginalized groups such as children with Down's Syndrome or autism, or, more generally to social issues.

7.   The Curriculum Development Institute (CDI)
7.1.   The stance of CDI on matters of stereotyping is governed by the recently produced discipline-specific Consultation Documents from the Curriculum Development Council (November 2000) entitled *Learning to Learn: The Way Forward in Curriculum Development*. These documents explicitly identify the roles of various change agents (school heads, middle managers, school teachers and librarians), and set out the specific strategies and actions each should undertake. Central to the documents are the discipline-specific *Appendices* which address *values* and *attitudes* as generic elements in the school curriculum. *"Core"* and *"Sustaining"* *"Values"* are identified, as are *"Attitudes"* and the former differentiated between *"Personal"* and *"Social"* foci. Among these constructs are some which directly impinge on the avoidance of stereotyping and the creation of a more inclusive, plural and tolerant representation of persons and roles in educational materials.

7.2.   CDI staff welcome the *proposed Guidelines* and believe they would make a contribution to the achievement of consistency in the incorporation of the above values and attitudes in educational materials. It is important to ensure their operationalisability, in particular interaction and cooperation between the Education Department, textbook publishers, examinations authorities and educational media producers.

7.3. CDI does not wish to avoid what may be regarded as socially contentious, or non-traditional issues and representations, and believes that these should be introduced in different disciplinary and subject specialisms, in ways appropriate to the age and maturity of school students.

7.4. Supplementary materials, or web-based materials lie outside the Textbook Committee's authority and here the *proposed Guidelines* would be especially valuable in reinforcing core values and attitudes.

7.5. The avoidance of stereotyping is seen as a key matter for teacher professional development, both pre-service and in-service, and should feature strongly in such curricula and programmes. This is especially important where teachers are being encouraged to develop their own materials. Issues raised in this research should be incorporated particularly into the training of Subject Panel Chairs.

7.6. The avoidance of stereotyping in the content of educational materials plays an important role not only in matters of representation but also in the emphasis such content can give to project work by students. Project work can encourage students to explore the social, personal and linguistic aspects of stereotyping in their own social environment. In particular, project-related surveys and awareness-raising tasks more generally can be directed at enhancing greater understanding of minority groups, new migrants, persons with disabilities and old persons and their lifestyles in Hong Kong.

7.7. Publishers could include many more photographs into textbooks, balancing the present overwhelming bias towards graphic illustration. Classroom activities, for example, dramatic and creative work and the exploitation of ETV programmes, can play a key role in dispelling and countering stereotypes. While matters of gender representation have been strongly addressed by the Education Department and CDI, greater emphasis now needs to be placed on areas such as disability, family structures and roles, old persons, and ethnic and cultural minorities.

D. RECOMMENDATIONS

1. Educational publishers, authors and producers to consider and respond to the proposed *Guidelines When Developing Educational Materials* (*the proposed Guidelines*), with a view to modifying their current policies and practices on avoiding and countering stereotyping in educational materials.

2. CDI and HKEA to consider adopting the *proposed Guidelines* for practice in the authoring and designing of educational materials to be approved by the Textbook Committee, and for school assessment materials to be used in Hong Kong.

3. CDI and the HKEA to convene seminars with publishers' associations in Hong Kong to discuss the adoption of the *proposed Guidelines* by relevant organisations and authorities.

4. The Education Department to convene meetings of those concerned with the selection of teaching materials at school level, with appropriate input from educational institutions concerned with teacher preparation and development, to review policies concerning textbook selection, in the light of the *proposed Guidelines* and the results of this research study.

5. Teacher education institutions to be invited to indicate how issues concerning the avoidance of stereotyping in educational materials, and teacher practices in class related to issues of avoiding or countering stereotyping, form part of their curricula, and in what manner such issues are presented and discussed with trainee teachers and teachers in professional development programmes.

6. The Education Department, through the Subject Panel Chairs, and with the cooperation of teacher education institutions in Hong Kong, to establish a series of professional development seminars concerned with promoting students' critical thinking and, in particular, encouraging the role of teachers in materials writing, materials evaluation, teaching and policy-making in the promotion of non-stereotyping practices. Such seminars could also focus on the development of model teaching materials and lesson plans for promoting themes and tasks/projects, which are non-stereotypical or counter-stereotypical.

7. The Education Department, with support from the Quality Education Fund and educational publishers, to sponsor the production and distribution of sample educational packages of best practice in non-stereotypical or counter-stereotypical textbook materials, both published and teacher-produced, across a range of subjects, levels and schools, accompanied by sample video material of classroom practice relating to issues of stereotyping.

8. The Education Department, with the assistance of the Quality Education Fund, to sponsor research studies into teachers' classroom actions and strategies in the use of stereotyped and non-stereotyped educational materials, the reception of such materials and such strategies by students, and associated studies of teachers' perceptions of such educational materials in the light of teachers' own beliefs, values and perceptions.

E. PROPOSED GUIDELINES (When Developing Educational Materials)

Textbooks, examination papers and other educational materials are created through the efforts of many people, including teachers, editors, materials writers, examination writers, illustrators, producers and directors. These learning resources influence the ideas and concepts students have of themselves and others. Where practical and appropriate, students who open a textbook or encounter other educational materials should see positive images of themselves, as well as their families, and cultural, ethnic and social groups, presented in a normal, supportive and encouraging way, reflective of the society at large. Good learning resources should also encourage students to be aware of, and appreciative of, differences among themselves and others in the community and the world.

Specifically, it should be ensured that where appropriate:

Females and males:-

- are presented with equal respect
- are illustrated in similar number and importance
- are shown in a variety of occupations, activities and careers beyond stereotypical representations
- are shown as making important contributions to the community
- are shown occupying mentally/physically active, creative, problem-solving roles and displaying both success and failure in those roles
- display a broad range of human emotions
- are shown as active and responsible parents

Cultural/Ethnic/Social groups:-

- are presented with respect for themselves and their customs, beliefs and activities
- are well represented in proportion to their numbers in the community
- are seen as active in a range of professions and occupations in the community
- are recognized for their contributions to the community

Old persons:-

- are presented with respect in a range of activities and occupations in the community
- are presented in a range of ages (not just young and old)
- are shown enjoying an active and productive social life in the community

Children:-

- are shown   as having the ability to make decisions, offer advice, solve problems
- are encouraged to engage with issues concerning social stereotypes
- are involved in exploring and evaluating social and personal themes and content

Persons with disabilities:-

- are presented with respect in a range of activities and occupations in the community
- are celebrated in terms of their contributions to the community
- are presented in the same kinds of activities as persons without disabilities

Family roles include:-

- examples of male and female single parenthood
- adopted children in families
- ethnically/culturally mixed parentage and children
- persons acting as caregivers, decision makers, homekeepers
- a broad range of relationships among old persons, parents, siblings, and spouses