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One-in-Eight Young People: Misunderstood and Misused

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Abstract

This paper interrogates UK government policy-making centred on the one-in-eight 18–24-year-olds who are recorded as 'inactive' in the Labour Force Survey. It is argued that the actual situations of these 'inactive' young people are misrepresented. Furthermore, no sound case is made for using the existence of this group to tighten the eligibility of all age groups for certain out-of-work welfare benefits thereby inflicting more hardship on some of the country's poorest households. Meanwhile, the actual difficulties faced by young entrants to the workforce in the 2020s remain unaddressed.

Keywords: disability, Labour Force Survey, mental health, NEET, welfare benefits

1. Introduction

We heard a lot about the one-in eight in the early months of 2025. The provocateur was a Green Paper from the Department for Work and Pensions (2025) which preceded a Spring Statement from the Chancellor of the Exchequer. The Green Paper claimed that welfare payments to persons of working age were rising unsustainably. In public discourse this was linked to rising levels of mental ill-health, especially among young people. Rising school absence rates were thrown into the charge sheet. It was hypothesised (evidence free) that the recent rise in mental disability must surely be due to over-diagnosis, and that the one-in-eight needed to be rescued from long-term welfare dependence thereby clamping down on an unsustainable welfare bill.

We shall see below that all the data are accurate, but the actual character of the one-in-eight group is misrepresented. Moreover, the different bundles of data simply do not fit together in the way that has become the basis for policy development. Older working age households, not 18–24-year-olds, will pay the price. Young people's genuine work entry problems will remain unaddressed.

The next section unpacks the separate bundles of evidence on which the policy narrative is based. The subsequent section shows that fitting the bundles together becomes easier when the perspective is widened contemporarily and deepened historically.

2. The Bundles

2.1 One-in-Eight

Table 1 gives the source of this figure. It is from

the rolling Labour Force Survey. It shows that in Autumn 2024 almost one-in-five (not eight) were NEET as conventionally measured (not in employment, education or training). Calculations normally include the unemployed (who are actively seeking work). The one-in-eight (13 percent in Table 1) are 'inactive', neither 'in' nor actively seeking employment, education or training. Table 1 also gives the comparable pre-Covid (October-December 2019) figures. At that time, it was just one-in-ten (10 percent, not 13 percent) who were inactive. Almost 200,000 additional 18–24-year-olds had become inactive. A possible explanation is an increase in disability whether over- or properly diagnosed. However, there are other possible explanations. Between late-2019 and late-2024 there had been declines in the number and percentage of 18–24-year-olds in employment (52 to 47 percent) and a corresponding rise in unemployment, but more so in inactivity and a corresponding rise in inactivity. Between 2019 and 2024 the size of the 18-24 cohorts had grown by just over 200,000. Roughly 100,000 more were in full-time education. Approximately 100,000 fewer were in employment. Just under 100,000 more than in 2019 were unemployed. Job scarcity is an alternative possible driver of these changes. The changes in the level and rate of inactivity need to be set in the context of these other changes.

Table 1. Labour market status: 18–24-year-olds

	Oct-Dec 2019		**Oct-Dec 2024**	
	N 1000s	**%**	**N 1000s**	**%**
Employed	2873	52	2730	47
Unemployed	299	5	370	6
Full-time education	1819	33	1916	33
Inactive	546	10	730	13
N	5537		5746	

Source: Office for National Statistics, Labour Force Survey.

We know that NEETs need to be disaggregated (Furlong, 2006; Yates & Payne, 2006). Some are unemployed, defined officially as not in employment but seeking work actively. There are further sub-groups within the one-in-eight. One sub-group is in transition, sometimes between jobs, sometimes between completing full-time education and starting their first career jobs. They may have jobs arranged with a future start-date. Others delay starting job search until they have left education and received their examination results and qualifications. It is not uncommon for higher education graduates to feel that they need a break before embarking on long-term careers. Few in this sub-group will be claiming benefits. They do not want to be pressured into applying for and accepting the jobs that are available through Jobcentres. Families will have supported these young people up to age 18, 21 or beyond and are content to continue to do so. Another sub-group are carers, typically mothers with young children. Body clocks say that their timing is right even though it is now normal for the highly educated to delay parenthood until they are established in their careers. Few in either of these sub-groups are at risk of long-term welfare dependence. A further subgroup are discouraged workers who have given-up searching and applying for jobs at the time when questioned by the Labour Force Survey (not necessarily for ever). Some return to education. Others will become inactive. Then there are those with an illness or condition that is keeping them out of the workforce. These 18–24-year-olds exist, but they are not the entire one-in-eight.

2.2 Claimants

In February 2025, the Department of Work and Pensions had roughly 24 million claimants. The largest group are the retired who can claim state pensions. Around 9 million claimants are of normal working age (16-64). Among these only 0.3 million are 18–24-year-olds.

In early 2025, 4.8 million were claiming Personal Independence Payments (PIP) or Disability Living Allowance (DLA). The latter was gradually being replaced by PIP (Table 2). In 2019 the total claiming one of these benefits was just 3.5 million. There has been an increase which needs to be explained but the mere 0.3 million 18–24-year-old claimants in 2025 cannot have been responsible for a 1.3 million rise. However, if disability had spread throughout the working age population as rapidly as inactivity had spread among 18–24-year-olds (a remarkable coincidence) this would explain the 2019-24 rise in PIP and DLA claimants.

Table 2. Claimants, all ages, Feb 2025, in millions

Personal independence payment	3.5
Disability living allowance	1.3
Job seekers allowance	0.09
Income Support	0.04
Universal credit	7.0

Source: Department for Work and Pensions, 2025.

2.3 Disability

In 2022-23, 23 percent of the working age population reported a disability or a long-standing illness or condition which caused substantial difficulty in day-to-day activities (Judge & Murphy, 2024). This percentage had risen from 16 per cent in 2012-13. Disability has been the main driver of increased spending on working age benefits. Just 10 percent reported signs of poor mental health. Most disabilities were physical. This remained the case despite benefit claims on mental health grounds having doubled (Vriend et al, 2025). In 2023 one-in-five 8–25-year-olds reported (on a strengths and limitations scale) a probable mental disorder (NHS Digital) but in most cases this was not interfering with their ability to work.

2.4 School Absences

School absences had been rising before, then leapt sharply following the Covid-19 lockdowns (Department for Education, 2025; Hunt et al, 2025). Subsequently levels have stabilised. They have not returned to pre-Covid levels. School absences could be but are not necessarily associated with mental or physical ill-health. Some pupils may simply dislike school, and the Covid lockdowns may have eroded the notion that you 'have' to attend.

3. Contexts

3.1 The History of NEETs: 16–17-Year-Olds

When the acronym NEET was first used (Istance et al, 1993) the young people were 16–18-year-olds. Until 1992, which was when regular Labour Force Surveys commenced in Britain, the official measure of unemployment was a claimant count. This became blatantly unreliable for the age group in 1988 when 16- and 17-year-olds lost the right to register and claim unemployment benefit. This was supposed to push NEETs back into education or training if they were unable to find jobs. A youth unemployment problem that had festered since the early-1970s was solved on paper.

Hence, the significance of the first research that attempted to track all 16-year-olds in target neighbourhoods in South Glamorgan. This estimated that between 16 and 23 percent of young people were NEET at some time. The NEET group had high inflow and outflow rates. This was similar to the findings that followed a scare about unregistered youth unemployment at the end of the 1970s (Roberts et al, 1981). Those concerned were believed to be found in multi-ethnic inner-city districts. The research in these locations found that the registered and unregistered unemployed were mostly the same individuals at different points in time. However, as with NEETs in the early-1990s, there was a 'hardcore', estimated at 9 percent to 12 percent who were long term non-registrants.

By the time that the findings in South Glamorgan became available, Labour Force Surveys were reporting on nationally representative samples. Table 3 gives the findings for 16–17-year-olds in the Autumns of 1992, 2012 and 2024.

Table 3. Labour market status: 16–17-year-olds

	Oct-Dec 1992		**Oct-Dec 2012**		**Oct-Dec 2024**	
	16-17 In full-time education %	**16-17 Not in full-time education %**	**16-17 In full-time education %**	**16-17 Not in full-time education %**	**16-17 In full-time education %**	**16-17 Not in full-time education %**
Employed	37	64	19	42	20	34
Unemployed	5	20	21	23	28	19
Inactive	58	16	69	35	73	47

Percentages of age group	*67*	*13*	*87*	*13*	*86*	*14*

Source: Office for National Statistics, Labour Force Survey.

This table shows that in 1992 67 percent of the age group were still in full-time education. School and college had beaten training schemes in recruiting post-compulsory students. The statutory school-leaving age had been raised to 16 in 1972 and remained 16 until 2013. However, by 2012 almost 90 percent were already 'staying on', sometimes switching schools or moving to a college. Since 1992 these students had apparently encountered greater difficulty when seeking part-time jobs. Greater competition from other groups such as higher education students? Among the 16- and 17-year-olds who had left full-time education in 1992, the majority (64 percent) had jobs, but this then fell to just 34 percent in 2024. A higher proportion (47 per cent in 2024) were inactive. These appear to be the individuals at greatest risk of becoming long-term NEET, but the 47 percent is from the 14 percent who had left full-time education, not the entire age group.

When the incoming New Labour government in 1997 launched the first of its New Deals, which was for 18–25-year-olds, it found that many of the intended beneficiaries had been out-of-contact (NEET) from age 16. The response was the creation in 2001 of an entirely new service, Connexions, with the priority target of hauling down the number of long-term NEETs, estimated from Labour Force Surveys to be between 9 and 11 percent of each cohort. The service would make contact with pupils considered at risk while in education, then coach them towards then into employment. Connexions' core staff were from remnants of the former Careers Service, plus youth and other community workers with the necessary soft skills. Connexions retained the former Career Service's remit to provide advice, information and guidance for all young people (McGowan et al, 2009; National Audit Office, 2004). Connexions failed to meet its priority target and was disconnected from central government funding in 2011.

3.2 Inactive at 18-24 Today

Since 2015, when 16- and 17-year-olds became required to remain in full-time learning the NEETs have usually been calculated from the population of 18–24-year-olds. Table 4 gives the findings from 2019 and 2024 which are also in Table 1 (above) but adds the findings from 2012 and 1992.

Table 4. Labour market status: 18–24-year-olds

	Oct-Dec 1992		**Oct -Dec 2012**		**Oct-Dec 2019**		**Oct-Dec 2024**	
	N 1000s	**%**	**N 1000s**	**%**	**N 1000s**	**%**	**N 1000s**	**%**
Employed	3325	59	2803	48	2873	52	2730	47
Unemployed	708	12	610	10	299	5	370	6
Full-time education	1016	18	1835	31	1819	33	1916	33
Inactive	619	11	578	10	546	10	730	13
N	5668		5826		5537		5746	

Source: Office for National Statistics, Labour Force Survey.

We can see that the proportion aged 18-24 in full-time education rose until 2012 and had by then stabilised at 31-33 percent. The proportion in jobs declined in the 1990s and 2000s then stabilised at 47-52 percent. The proportion unemployed declined from 12 and 11 percent in the 1990s and 2000s, to 5 and 6 percent in 2019 and 2024. Throughout most of this time series between 10 and 11 percent were inactive. Then in 2024, the rate rose to 13 percent. This rise looks small and unremarkable, but maybe at least noteworthy when set against the previous 30 years of stability. In 2024, almost 200,000 more 18–24-year-olds were inactive than in 2019. There was no similar rise throughout the entire working age (16-64) population. Its inactivity

rate fell from 24 percent in 1992 to 22 percent in 2012 and remained at this level in 2019 (21 percent) and 2024 (22 percent).

4. Discussion and Conclusions

So, what was once one-in-ten has become one-in-eight. This is a small, barely significant change compared with the longer-term shifts in Table 4 between education and employment. The change to one-in-eight may be making an unwelcome impact on health and welfare services and spending. Even so, we have seen earlier that the numbers do not match in the way required by the claim that too-easy-to-access disability benefits are a major driver of the other bundles of evidence that are marshalled to justify the policy response.

The DWP's institutional memory must show that 'tough love' is not the best way to boost employment among groups that fall beneath employers' definitions of 'employable'. It is employers, not intended employees who need to be 'required' and 'incentivised'. State interventions in Britain to promote the employment of disabled persons began in 1944 with the intention of avoiding the post-1918 scenes of war disabled begging on the streets. There was a disabled register, reserved occupations, sheltered workplaces, and a requirement on employers to have at least three percent of their staff from the register. The register and the requirements have now been absorbed or replaced by discrimination and equality legislation. Nothing has ever worked to the full satisfaction of any of those affected. However, financial incentives for employers lay behind the limited success of Youth Training Schemes (1983-), New Labour's New Deals (1997-) and the Future Jobs Fund (2009-10). Help to Work (2014-) which relied on sanctions made no measurable impact.

The real cause of the rise in inactivity among young people is being ignored. Let us return to the crude numbers in Table 1. Between 2019 and 2024 there was a modest rise in the number of 18–24-year-olds from 5,482K to 5,754K. The number of jobs filled by this age group declined from 3,491K to 3,413 (63 per cent to 59 percent of the age group). This was accompanied by a two percent rise in unemployment and a three percent rise in inactivity. Job scarcity and job quality are the most plausible drivers of the redistribution of 18–24-year-olds between 2019 and 2024.

Those who do not pass the first hurdle of five or more good GCSEs at age 16 face a choice between low-paid, part-time, temporary, variable hours jobs (Judge & Murphy, 2024; Murphy, 2022; Navani & Florisson, 2024). Those who become university graduates face a mismatch between the jobs for which they can credibly apply and the skills that they can offer. Given that stepping down the job ladder is likely to incur a long-term penalty (Boero et al, 2025; Vobemer & Schuck 2016) is it any wonder if they delay, prolong inactivity, and continue to seek jobs offering careers commensurate with their qualifications. Is it any wonder if some shelter from the labour market. Basic unemployment 'pay' is paltry. This is an incentive to present an illness or condition that qualifies for greater welfare generosity.

A flawed analysis means that between 0.8 and 1.2 million of the country's poorest households will lose PIP entitlement worth at least £4K per year (Brewer et al, 2025). We might try job creation as an alternative to sanctions. It is surprising how low the bar will fall above which people are considered employable in conditions of job plentitude.

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Commodifying the Journey Through Platform Economies and the Transformation of Gap Year Travel into Personal Growth Narratives

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Abstract

This paper critically examines the commodification of gap year travel experiences within the expanding structures of platform economies, focusing specifically on the Canadian context. Once imagined as organic periods of exploration and self-discovery, gap years have been reengineered into highly curated and marketable narratives of personal growth, moral development, and global citizenship. Through an analysis of key digital platforms such as Workaway, WWOOF, and GoAbroad, the study reveals how experiences are algorithmically standardized, aestheticized, and rebranded as strategic investments into "experiential capital." Drawing on theories of neoliberal subjectivity, affective labor, and symbolic violence, the paper highlights how platforms discipline travelers into narrators of their own commodified journeys, reinforcing structural inequalities under the guise of authenticity and meritocracy. Content analysis of marketing materials from platforms like VolunteerWorld further illustrates how acts of labor and service are reframed as milestones of self-improvement rather than solidarity. Ultimately, the research argues that the gap year, mediated through platform economies, emerges not as an escape from neoliberal logics but as a deepening engagement with them, transforming self-exploration into a globally circulating, consumable product.

Keywords: gap year travel, platform economies, experiential capital, affective labor

1. Introduction

The concept of the "gap year" — traditionally conceived as an organic, self-directed intermission between structured phases of life such as secondary education and university or employment — has undergone a profound transformation over the past two decades. Originally idealized as a period of self-exploration, travel, and experiential learning, gap years were celebrated for fostering personal growth outside the rigid expectations of institutional pathways. However, as platform economies have proliferated globally, the nature of gap year travel has shifted dramatically from spontaneous exploration toward a curated, commodified, and narrativized experience.

In the Canadian context, this transformation is particularly pronounced. Digital platforms specializing in volunteer tourism, working holidays, and experiential learning now mediate a large portion of gap year activities. These platforms — such as GoOverseas, Workaway,

and EF Gap Year — offer prepackaged itineraries that promise not merely travel, but personal transformation, professional skill-building, and moral enrichment. Consequently, gap year experiences have been folded into the neoliberal logic of self-investment and self-branding, where travel becomes a means of constructing a marketable, authentic, and socially valuable personal narrative.

The intertwining of platform economies and personal growth narratives illustrates a broader trend toward the commodification of identity work. As young Canadians embark on gap years, their experiences are increasingly shaped by algorithmic matchmaking, social media storytelling, and consumer choice frameworks that emphasize personal differentiation in competitive labor markets. Rather than a break from neoliberal values, the contemporary gap year often represents a deepened engagement with them — a structured journey less about "getting lost" and more about "finding oneself" in ways that are easily communicable and economically valuable.

This phenomenon demands critical scrutiny. By examining how gap year travel is marketed, consumed, and retrospectively framed in Canada, this study investigates the role of platform economies in transforming self-exploration into a form of commodified labor. It also highlights the socio-economic barriers embedded within these narratives: the affordability of structured gap years, the digital literacy required to navigate platforms effectively, and the cultural capital necessary to translate travel experiences into valued forms of self-representation. In doing so, it opens a dialogue about how youth mobility, personal development, and digital economies converge to shape contemporary modes of selfhood in an era of pervasive commodification.

2. Platform Economies and the Structuring of Travel

The rise of platform economies has fundamentally reconfigured how gap year travel is conceptualized, accessed, and experienced by Canadian youth. Once characterized by spontaneous exploration and loosely planned adventures, today's gap year is increasingly mediated by digital infrastructures that not only facilitate travel logistics but also actively produce the meaning and structure of travel itself. What emerges is a shift from unstructured movement to commodified mobility, where the gap year becomes a carefully curated, algorithmically optimized, and narratively pre-scripted project.

Platform economies, as defined by Davies et al., are ecosystems where digital intermediaries facilitate the exchange of services, experiences, and labor between dispersed actors. In the context of gap years, platforms such as Workaway, WWOOF, and GoAbroad do not merely connect travelers to volunteer projects, homestays, or internships; they curate and standardize entire experiential trajectories. These platforms construct a catalog of personal development opportunities that seamlessly blend travel with work, leisure with altruism, self-discovery with marketable skill acquisition.

Through these platforms, gap year travel is increasingly reframed as a strategic investment in self-formation — a way to accumulate experiential capital that can later be converted into academic credentials, employability advantages, or enhanced social prestige. Yoon (2014) demonstrates how this reconfiguration aligns with broader neoliberal ideologies that prioritize individual entrepreneurialism, self-responsibility, and continuous self-optimization. Within this logic, the value of travel is not intrinsic; it is realized through its capacity to enhance one's personal brand in an increasingly competitive global marketplace.

Crucially, platform economies standardize experiences under the guise of personalization and authenticity. Despite the marketing rhetoric of "unique" and "life-changing" journeys, many gap year offerings converge around remarkably similar templates: volunteering with children in Southeast Asia, participating in organic farming projects in Europe, or joining language exchange programs in Latin America. What appears as infinite choice is in fact a highly curated menu tailored to fit dominant Western narratives of moral growth, intercultural competence, and personal resilience. Table 1 illustrates the standardization across major gap year platforms.

Table 1. Standardization of Gap Year Experiences Across Major Platforms

Platform	Common Themes Marketed	Example Locations
Workaway	Sustainable farming, hospitality	Spain, Costa Rica, Australia
WWOOF	Organic farming, eco-living	New Zealand, Japan, Italy
GoAbroad	Volunteering, teaching English	Thailand, Peru, South Africa

Beyond organizing logistics, platforms also produce subjects. They encourage travelers not merely to consume experiences but to perform them according to established narrative templates. By emphasizing themes such as "authentic cultural immersion," "transformational hardship," and "self-discovery through service," platforms discipline travelers into becoming narrators of their own commodified journeys. Participants are often implicitly or explicitly encouraged — through features like blog competitions, curated Instagram reposts, and user testimonial showcases — to document and share their experiences, thus feeding a continuous marketing machine that sustains the platform's visibility and appeal.

This dynamic generates a powerful feedback loop: the more participants share polished, aspirational accounts of their gap years, the more powerful the normative ideal of transformational travel becomes. This, in turn, attracts new users seeking similar narratives of meaning, growth, and distinction, reinforcing the idea of gap years as essential middle-class rites of passage. The cycle of this dynamic is visualized below.

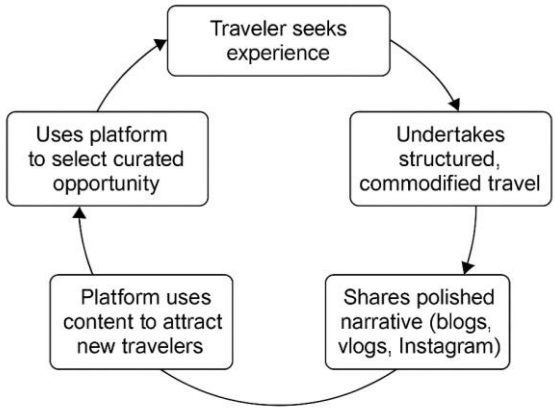

Figure 1. Feedback Loop of Platform-Mediated Gap Year Travel

Successful participation within this ecosystem demands far more than wanderlust. It requires digital literacy (navigating booking systems, mastering social media storytelling), social capital (access to trusted hosts, networks for recommendation and visibility), and economic resources (funding for travel, program fees, insurance, and leisure). As Snee (2016) points out, these embedded requirements expose the profound structural inequalities shaping the landscape of gap year mobility. While platforms rhetorically promise democratization and global belonging, they in practice reproduce and intensify existing socio-economic divides.

The very skills that platforms implicitly require — branding oneself as adventurous yet responsible, cosmopolitan yet grounded, altruistic yet ambitious — are not evenly distributed across all youth demographics. Those who succeed in navigating and narrating their gap year experiences in ways that platforms reward are often those already endowed with high levels of cultural and symbolic capital.

Far from opening global mobility to all, the platform economy increasingly structures travel into a scripted, economically contingent performance of commodified selfhood. Authenticity itself becomes a scarce and marketable resource, selectively accessible to those already positioned advantageously within global social hierarchies.

3. Commodification of Growth Narratives

As gap year experiences are increasingly positioned as "transformational journeys," the underlying motivations, structures, and outcomes of travel are systematically reengineered to fit marketable narratives of self-betterment, moral distinction, and cosmopolitan sophistication. Rather than emphasizing unstructured exploration or unmediated cultural immersion, contemporary gap year marketing in Canada repackages labor, mobility, and altruism into highly curated, consumable stories of personal development. Travel becomes not a site of open-ended discovery but a means of producing the self for

future social, academic, and economic advantage.

According to Hermann, Peters, and Van Trijp (2017), commercial providers of gap year experiences deliberately frame challenging, labor-intensive, or ethically ambiguous activities — such as unpaid volunteer work in vulnerable communities — as transformative rites of passage. By reframing acts of service or labor under the banner of personal enrichment, these programs construct travelers as morally elevated global citizens, endowed with courage, resilience, and empathy. The hard, and sometimes exploitative, realities of volunteer work are thus obscured by a layer of narrative romanticism, masking asymmetries of power, privilege, and resource flow.

This discursive construction aligns seamlessly with broader neoliberal ideologies. As Salet (2021) illustrates, storytelling platforms such as *Passion Passport* amplify these narratives by offering aestheticized templates for transforming travel into visible, shareable proof of personal authenticity and virtue. Within the neoliberal moral economy, selfhood is no longer cultivated in private but performed publicly, framed as a series of strategic investments into one's own brand value. Experiences, emotions, and ethical performances are reified into forms of experiential capital that can be leveraged for future personal gain. The narrative arcs encouraged by gap year platforms typically follow a predictable structure, summarized in Table 2.

Table 2. Typical Narrative Structure in Gap Year Marketing Materials

Narrative Stage	Marketing Emphasis	Platform Examples
Departure/Separation	Courage, independence, adventure spirit	GoAbroad, VolunteerWorld
Experience/Engagement	Skill-building, "real-world" encounters	WWOOF, Workaway
Reflection/Transformation	Enlightenment, employability, global empathy	Passion Passport, Global Citizen Year

(Hermann et al., 2017; Salet, 2021).

This structure reinforces an ideologically saturated version of self-development — one where challenges are overcome, character is built, and global consciousness is achieved, all within the confines of safe, carefully curated environments. Beyond their immediate marketing appeal, these narratives serve several critical functions:

3.1 Legitimizing Nonlinear Life Paths

The neoliberal labor market increasingly rewards flexible, emotionally intelligent, globally-minded individuals. Gap year experiences thus become legitimized as strategic deviations from the traditional linear progression of school-to-career. Travel — once imagined as rebellion — is reframed as career capital, a calculated detour toward building "soft skills" prized by universities, employers, and professional networks.

As Brown et al. (2012) note, this reframing contributes to the construction of the self-as-project: a constantly developing enterprise requiring continuous self-investment and documentation. The gap year no longer interrupts neoliberal temporality; it accelerates it.

3.2 Masking Inequalities of Access

Marketing materials for gap years emphasize personal bravery, open-mindedness, and altruistic intent, while silencing the profound socio-economic inequalities that determine who can participate. Travel requires not only courage but substantial financial investment (for program fees, travel costs, insurance, vaccinations), access to passports, visas, and bureaucratic infrastructure, cultural and digital capital to navigate international systems and storytelling platforms. By naturalizing travel as an attainable choice, gap year marketing practices perpetuate symbolic violence (Bourdieu) — disguising privilege as meritocracy. Those unable to participate are framed as lacking ambition or initiative, obscuring systemic barriers to global mobility.

3.3 Performative Authenticity

Gap year experiences must not only be lived but

curated, narrated, and performed for digital audiences. Participants engage in affective labor (Hardt, 1999), producing emotional and experiential content designed to generate engagement, admiration, and social validation.

In this process, "authenticity" — once an uncommodifiable ideal — becomes a marketable style, visual authenticity (natural landscapes, candid portraits), narrative authenticity (struggles, self-reflection, altruistic encounters), moral authenticity (service to others, cultural humility). Success in this economy depends on the traveler's ability to script their self-transformation into recognizable, aesthetically pleasing, and emotionally resonant stories.

3.4 Commodification of Ethical Labor

Volunteer-based gap year programs often operate in the grey zone between altruism and experiential consumption. Projects framed as "helping communities" frequently involve precarious labor that benefits the traveler more than the host society.

Participants' experiences of "giving back" are packaged into transformative milestones, boosting their résumés and social media profiles while reinforcing narratives of Global North saviorism.

Meanwhile, local communities — frequently imagined as grateful recipients of Western benevolence — are relegated to background scenery within the performative dramas of traveler self-actualization. This dynamic perpetuates neo-colonial discourses, disguising asymmetrical relations of power under the language of empathy and solidarity.

3.5 VolunteerWorld and the Marketing of Transformation

A close reading of marketing materials from VolunteerWorld — one of the largest platforms for Canadian gap year volunteering — reveals how commodification works at the narrative level. Typical slogans such as: "Step out of your comfort zone"; "Develop essential life skills"; "Change your life while making a difference", reveal the dual agenda: personal transformation is prioritized over systemic engagement, and ethical labor is reframed as an act of experiential self-creation. This shift mirrors broader critiques of the experience economy (Pine & Gilmore, 1999), where even acts of service become commodities for individual consumption. By understanding how gap year travel is narrativized, aestheticized, and commodified, we reveal the mechanisms by which platform economies produce highly scripted, consumable, and socially stratified identities. The journey is no longer an act of serendipity or genuine immersion; it is a pre-scripted act of self-production, shaped by digital capitalism, neoliberal subjectivity, and global inequalities.

Contemporary gap year narratives thus function not only as individual rites of passage but as collective performances that reinforce dominant economic logics, maintain symbolic hierarchies, and further entrench the commodification of experience itself.

4. Demographic Realities and Inequalities

Despite the democratizing rhetoric often associated with gap year travel — emphasizing accessibility, empowerment, and global citizenship — the commercial gap year remains largely the domain of the middle- and upper-class youth. As Snee (2016) underscores, the socio-economic profile of typical Canadian and Western gap year participants reveals persistent inequalities: they are predominantly white, urban, and from families with above-average income and educational attainment.

The financial barriers to entry are substantial. An average gap year package targeting Canadian students typically costs between CAD 5,000 and CAD 15,000, excluding ancillary expenses such as pre-departure training, vaccinations, and emergency contingencies. This pricing structure implicitly limits participation to those who either possess disposable family income or can access financial resources through loans, fundraising, or precarious pre-travel labor. Table 3 illustrates a breakdown of typical gap year expenses for Canadian participants.

Table 3. Average Canadian Gap Year Expenses (CAD)

Category	**Percentage of Total Cost**
Program Fees	40%
Travel (Flights, Local)	25%
Accommodation & Food	20%
Insurance, Visas, etc.	10%

Miscellaneous (Gear)	5%

The high financial threshold for participation generates several layered inequalities:

4.1 Economic Inequality: Who Can Afford to Transform?

Participants are often required to save intensively — sometimes for years — or rely on family support to finance their gap year. Those without such safety nets face exclusion or resort to **precarious labor** (gig work, service industry jobs) to accumulate sufficient funds. Even when lower-cost programs exist, hidden costs like insurance, visa fees, and travel gear create financial barriers that disproportionately affect students from marginalized backgrounds.

4.2 Cultural Capital and Social Networks

Drawing from Bourdieu's theory of cultural capital, successful navigation of the gap year market requires more than financial means. It demands the ability to identify reputable programs, craft compelling applications, and later translate the experience into valuable social narratives. Students from families with international experience, higher education backgrounds, or strong social networks are better positioned to leverage their gap years for future academic or career advancement.

4.3 Racial and Spatial Inequalities

Although marketing materials often showcase diversity, actual participation skews heavily towards white, middle-class youth, both globally and within Canada. Racialized youth — particularly those from Indigenous, Black, or immigrant communities — face additional barriers, including systemic discrimination in visa processing, international mobility restrictions, and underrepresentation in program leadership and storytelling.

4.4 Reinforcing Privilege Through Experiential Capital

Upon return, gap year alumni often capitalize on their experiences to distinguish themselves in competitive academic or professional environments. Volunteer experiences, language acquisition, intercultural competencies — all become lines on résumés, enhancing employability. Gap years not only reflect socio-economic privilege but actively reproduce it, converting financial investment into symbolic and social capital.

4.5 Scholarship Gaps in Gap Year Programs

A review of major Canadian gap year providers such as EF Gap Year, Projects Abroad, and Global Citizen Year reveals that while some offer scholarships, these are limited both in number and scope. Competitive application processes favor candidates who already possess the kinds of cultural capital — eloquent personal essays, prior travel experience, prestigious references — that disadvantaged youth often lack. Consequently, "accessible" gap year narratives obscure how structural inequalities persist beneath surface-level diversity efforts.

Far from leveling the playing field, the current platform-mediated gap year economy in Canada entrenches existing inequalities. Participation becomes a function not just of aspiration and determination, but of pre-existing economic, social, and cultural privilege, reinforcing the myth that personal transformation is universally accessible.

5. Authenticity as a Competitive Field

5.1 Authenticity, Storytelling, and Platform Performance

In the platform-mediated gap year economy, authenticity is not a given; it is a curated and performative construct. Platforms do not merely offer logistical services; they actively produce, distribute, and normalize specific narrative forms that valorize personal growth, cultural immersion, and moral elevation. As Salet (2021) highlights, aspirational storytelling is central to how platforms like *Passion Passport* market gap year experiences — offering young travelers pre-designed narrative templates through which their journeys are framed, shared, and validated.

5.2 The Platformization of Authenticity

Authenticity, traditionally associated with spontaneous, unmediated encounters with the "other," is systematically aestheticized and commodified within digital ecosystems. Travelers are subtly encouraged to produce content that matches prevailing visual and narrative aesthetics: rustic farmhouses, vibrant markets, smiling children, solitary sunsets. These recurring tropes align closely with platform algorithms that favor visually emotive, easily consumable narratives.

The authentic self becomes a branded self, cultivated carefully for audience reception and platform visibility. Gap year alumni are transformed into content creators, producing

social capital for themselves while simultaneously generating marketing value for the platforms.

Common narrative archetypes promoted by travel storytelling platforms include the "transformation through adversity," "local immersion," "self-discovery in solitude," and "making a difference." These templates both inspire and constrain travelers, guiding them toward producing stories that fit recognizable — and thus marketable — patterns.

5.3 The Economy of Affective Labor

Importantly, posting, sharing, and narrativizing travel experiences are not neutral acts; they are forms of affective labor — emotional and creative work performed for social or economic gain. Platforms implicitly incentivize high-performing content through mechanisms like reposts, feature articles, and social media amplification, turning travelers' affective labor into a marketing tool.

Through repeated cycles of experience documentation, sharing, and algorithmic reinforcement, travelers contribute both to their personal social capital and to the economic expansion of platform brands. In this process, authenticity is continuously manufactured and reproduced, tightly intertwined with the logics of visibility, engagement, and commodification.

5.4 Authenticity as a Competitive Field

Within this economy, authenticity itself becomes a field of competition. Travelers must differentiate their narratives within increasingly saturated markets of self-representation. As a result, there is an escalating drive towards ever more "extreme" or "unusual" experiences — off-the-beaten-path volunteering, survival treks, or deep rural immersions — as travelers seek to claim the mantle of the "truest" authenticity.

Ironically, however, this competition often leads to a homogenization of stories. Different individuals, operating under similar incentives and aesthetic pressures, tend to produce remarkably similar representations of personal growth, cultural immersion, and global compassion. What begins as a search for individuality culminates in a mass-produced authenticity, revealing the paradox at the heart of platform-mediated gap year storytelling.

5.5 Passion Passport's Storytelling Templates

An analysis of featured articles on *Passion Passport* between 2022 and 2024 shows a remarkable convergence around a few dominant story arcs: The "life-changing moment" in an unfamiliar culture, personal rebirth through getting lost, moral self-formation through volunteering, aestheticized hardship narratives (illness, loss, emotional struggle abroad). These patterns demonstrate how platform structures shape both the form and content of individual travel narratives, embedding the pursuit of authenticity within the dynamics of visibility, performativity, and commodification.

6. Conclusion

In Canada, gap year travel has been profoundly transformed by the expanding logics of platform economies. What was once imagined as an organic and self-directed period of exploration has been systematically reengineered into a curated, marketable, and highly commodified pathway of self-development. Digital platforms not only structure the logistical aspects of these journeys but also shape the very narratives through which travelers understand, perform, and share their experiences.

This platform-mediated structuring generates a dual dynamic: on the one hand, it offers participants a powerful narrative of empowerment, discovery, and global citizenship; on the other hand, it masks the underlying socio-economic exclusions and standardizations that accompany the commodification of youth mobility. As gap year journeys are increasingly framed around personal growth, skill acquisition, and moral distinction, they reinforce existing inequalities — privileging those who possess the financial, social, and cultural resources necessary to access and capitalize on these experiences.

Authenticity itself becomes a commodified asset within the platform economy. The aesthetics of "realness" — curated hardship, aestheticized immersion, and polished self-discovery — are produced and reproduced through algorithmic selection and affective labor, generating a paradox wherein the pursuit of individuality results in homogenized, mass-consumable narratives. In this context, young Canadian travelers are not merely consumers of global experiences; they are active producers of content, affect, and market value within a wider digital capitalist ecosystem.

Understanding the commodification processes behind contemporary gap year travel is therefore crucial — not only to deconstruct the

myths of universal self-betterment that platforms propagate, but also to critically interrogate how experiences, identities, and social capital are differentially distributed and valorized. The gap year, mediated by digital platforms, emerges less as a rupture from neoliberal logics than as a reinforcement of them: a strategic investment in the self as an entrepreneurial project, positioned within a globally circulating economy of images, narratives, and aspirations.

As the platform economy continues to deepen its reach into the intimate spaces of personal development and identity formation, future research must continue to interrogate who is included, who is excluded, and how the politics of representation, labor, and mobility are reconfigured in an era where even self-discovery has become a site of commodified performance.

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Female Founder in Sociology: Jane Addams

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Abstract

Jane Addams, is the only doctor of sociology that has been associated with the Chicago School of Sociology. The controversial and questionable connection of Addams to this school, because although it was directly related to the school, had some gaps in the way of lecturing at the University, so it could rightly be established that it is an external member of the University. She is known for the establishment of a kind of commune for the lives of homeless people, in which there were all kinds of lives, from cafes, libraries, shops to the rest, and where she wanted to examine the relationship of an individual with his environment in an empirical way emphasizing that the way of organizing social relations is structured by the person from the inside 19. However, Hull House did not just present it, within the framework of this multifunctional house a strong academic activity was taking place, and there were professional sociologists and social workers who studied the ways of life in this orderly community (how adolescent poor existential conditions behave in changed circumstances). Interesting is the approach of a researcher in the field of sociology dealing with the analysis of the relationship with the sociological research of Addams and other representatives of the Chicago sociological school.

Keywords: Men's Chicago School of Sociology, hull house, mapping, "hull house" project

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It was announced that the first generation was highly respected and supported by the work and personality of Small, while only the Park declares that she knows something about the author. However, Park's attitude towards the work of women in academic institutions was discriminatory. Jane Addams's place at the Chicago School of Sociology and her relationship with contemporaries. This house was originally known as Hull house, and it is actually a moment when it applies its elemental idea that a person can be tested only if the area of his / her activity in the environment in which he / she lives is affected. Small was a frequent visitor to project Hull House, and used them in teaching, supported the publication of works using these techniques supported the doctrine of the divided spheres, the sexual segregation of Chicago's wonderful colleague, a slow doctor, worked on social reforms Henderson used a frequent visitor and lecturer in his works, probably at the lectures advocating the synergy of traditional and liberal rights colleagues working on a number of projects with the same social reformist goals. The Zueblin inhabitant, frequent visitor, the lecturer used the technique and contributed to supporting the surfeit movement of the colleague. Vincent as a

frequent visitor, probably much more liberal than Small, but believed in the doctrine of separate spheres (private / public), considered her a colleague in some programs. Thomas, frequent visitor, lecturer, active support, taught emigrants and urban problems (socially disorganized) dramatic change of ideas from socially Darwinist to egalitarian colleagues in research topics related to women, prostitution, immigrants, and juvenile delinquency. Mead frequent visitor, lecturer, active support preferred mapping as the methodology of egalitarian colleagues, especially in the field of pragmatism and consideration of everyday life.

Burgess was distanced, but impressed by the project using a mapping technique of mixed ideas, supported the idea of divided spheres admiring the characters of women on the pedestal.

Park used little or no contact in mapping, studying the urban life, as a sexist, he only knew Addams.

Deegan, Mary Jo (1986), Jane Addams and men of the Chicago school, 1892-1918, source: http://www.hullhouse.org/website/about.asp, www.rolandbolandproject.

The intersection of gender, families, public and academic life, indicates the existence of a divided opinion on the academic work of women, in particular Jane Addams, and the views range from extreme egalitarian to ultimate sexist attitudes regarding the equal involvement of women in the academic, public and political spheres. For this reason, a distinction was made between the male and female Chicago school of sociology. Mead and the theory of interactionism, and wrote about the relationship between society and personality, for example the relationship between personality, his family and society, on examples of everyday interaction from clubs and cafes to the way of spending spare time. Concepts that are of great importance to my research are the ecological approach to the urban environment and urbanism as a way of life. Her most important work was published in 1903, and in the translation into Bosnian language would be Democracy and Social Ethics (Democracy and Social Ethics). She showed a great interest in the ecological problems of the time, and during her life technical mapping was developed, without which it was absolutely impossible to obtain a doctorate in the field of sociology and other social sciences from the University of Chicago of that time (Knežević, 2009). Interview is the most important technique for collecting data. It is significant that the Chicago School of Sociology is known for translating an interview on the survey, especially in the use of the case stage case, which also arises in the Chicago School of Sociology. Later, the method of qualitative interview is the most important method of the Chicago School of Sociology (Koludrović & Leburić, 2002). The interview belongs to the most common means of data collection, and it represents a spoken or written communication between two or more persons with the aim of gathering information about the opinions, facts, and attitudes ... of the respondents about a social phenomenon. Ethnographic interviews are the subject of the study of the Chicago School of Sociology, especially in the work of Jane Addams and studies in the framework of the Hull House project (juvenile delinquency, the behaviour of alcoholics and emigrants), and later in the work of the already-appointed sociologist Dorothy Smith. Jane Addams, under the influence of the symbolic interactionism of George Herbert Mead, considered that the observation of the individual in the immediate environment was the most important, and in methodological terms, as the most important sociologist, she invented a mapping technique.

Without a mapping technique, it was not possible to complete a doctorate in that field. Jane Addams, in addition to being the most important sociologist of that period and the first American Nobel laureate, simultaneously influenced the entire “male” school of the sociology of the park, Burgess, Wirth, and their mapping of cities according to the ideas of the human then social ecology would not have been possible without her technique and empirical work at Hull House. Here is the source of the feminist methodology, that is, the methodology of studying gender as a modern discipline separate from the traditional male-stream methodology. So, although sociologists used mapping techniques, they reduced the importance and role of her work. The following is the next map showing the city’s zones to Burgess and the Park (http://sociology.uchicago.edu/dep_hist.htmlhttp ://www.pragmatism.org/genealogy/Chicago.htm, http: //www.societyforhumanecology.org/pages visited, October 15, 2011). Observing an individual cannot happen unless we observe his

/ her environment, the fundamental setting of the theory started in the work of Jane Addams. Therefore, interviewing as a qualitative one must contain a section or a map where the person's place of life will be displayed. An example of this is the distinction of identity to the place of life. The allied identities that exist in the cities arise as a result of alienation from themselves, and there is also shyness, as Harvey observes. With the bliss that Zimmell noticed as the negative consequence of technology, in the sense of the feeling of vanity and nonsense within the person, the negative consequences of the accelerated advancement of technology on the human psyche are alienation and schizoid tendencies, which Myersen further explicated as Ecopatology within the postmodernist socio-political consideration of the concepts concerning the maintenance of the humane environment, and the coexistence between man and the natural world. For this reason, it was necessary to introduce a distinction between urban / rural status, gender, age, occupation, education, because the ecology of urban cities became the site of the biggest allusion. In this paper I use the research ideas of the Chicago School of Sociology. After Jane Addams, a significant sociologist was Helen Bosanquet (1860-1925), who dealt with social work and the morale philosophy she graduated from Cambridge. She dealt extensively with the issues of poverty, women's work, and family. Her best-known works are *Rich and Poor* (1896), *Social Work in London* (1973), *Family* (1915) (Scot 2007: 14-17). In addition to Jane Addams, Helen Bosanquet, the well-known sociologist of that period was also Beatrice Webb. These three sociologists have been included in the work of John Scout, Fifty Key Sociologists from 2007. Beatrice Webb claimed that Dahrenhdorf belonged to the Labor Party and was actively engaged in political, poverty, and "craving for a faith that would satisfy both her emotional needs and intellectual beliefs about equality and justice" (Dahrenhdorf, 2008: 13). Scot is the most important place and importance given by Jane Addams as a leading sociologist and feminist pragmatism. Sociological works and histories of historical sociology are still unfair to women sociologists, and the XXI century records an insufficient number of translations of author's works, which, unlike Scots, speak of academic achievements of women. One of such works by Women in Sociology, edited by American socialist Mary Jo Deegan, inspired by Jane Addams' life and work, mentions as many as fifty-three sociologist women. Deegan determines sociology in women's discipline, expressing her eminent attitude: "The greatest number of influential women in the world was so-called sociologists"! At the same time, in the scientific sense, she critically reflected on the misogyny of the father of the founder of sociology, emphasizing the marginalization of public and academic recognition of sociological studies of women. The institutionalisation of women's sociology, that is the university professorial position for a woman, was possible only after the author's works by Jane Addams and her associates. Edith Abott and Sophonsiba Breckinridge graduated in sociology, but they could not do doctorate, because of the prevailing misogynistic attitude towards women, but they always remained concerned with gender issues gender discrimination. Emily Greene Balch, as Mary Jo Deegan shows "cultural feminist and pragmatist" (1990: 55-59), was a sociologist who wrote about the problems of emigrants but also of the celebrity, is also the second scientologist who received the Nobel Peace Prize, although male sociologists did not recognize it. Ruth S. Cavan, Ph.D. in Suicide at Chicago University, became professor emeritus at Rockford Colleague, only in 1935, Rosa Laub Coser became an instructor of sociology at Chicago University in 1947, and then a full-time professor at Wellesley Colleague, Frances Donovan wrote several monographs related to the Chicago School of Sociology and dealt with human ecology. Charlotte Perkins Gilman among the most authoritative authors and lecturers was also a young researcher and practitioner of the Chicago School of Sociology, Amy Hewes, in 1943; she became Honorary Professor, Hull House Housemaid and sociologist Frances. A. Kellor has become an active supporter of women's voting rights and the rights of coloured women, but also the author of a series of papers in the field of sociology. The methodology of sociological research was dealt with by the Doctor of Sociology (1905) Susan Kingsbury, the sociologist of Chinese descent Rose Hum Lee lectured at the Roosevelt University since 1945, and the head of the sociology department of that university, as well as the bourgeois for the rights of national minorities, sociologist Helena Znaniecka Lopata was lecturing in 1956 at De

Paul University as well as at Roosevelt (1960). "The First Professional Sociologist" by Mary Jo Deegan (1990: 281) Annie Marion Maclean, for her first magic and doctoral degree in sociology at Chicago University under the leadership of Small, Henderson and Mead, and because of sexism despite high qualifications, she was never employed as a regular member of the department, and taught sociology to thousands of students answering questions at distance, correspondence. Harriet Martineau is one of the earliest women of the sociologist, who delighted Comte with the translation of his work, and is also the founder of sociology; sociologist of Czechoslovak origin Alice Masaryk, engaged in applied sociology; Virginia Oleseen, sociology doctor, became a full-time professor of sociology in 1973, San Francisco; Alice Rossi has achieved several prestigious scientific awards in the field of sociology, an outstanding lecturer in sociology and a director of several sociological associations; Ethel Shanas, Ph.D., became a full-time professor in 1965, "and in 1987 she was the only professor of sociology along with two senior lecturers at the Department of Sociology at the University of Chicago from a total of twenty-three professors" (Mary Jo Deegan, 1990: 352); Anna G. Spencer is one of the first recognized sociologist lecturers in 1913 and 1918 (Chicago), then the first dean of women (Chicago) Marion Talbot, whom Deegan emphasizes is "the central figure of the Chicago School of Science, and whose work is massive literature hiding within the male sociology" (1990: 391), and Rosalie Wax, who taught social anthropology at the Chicago University, are just some of them directly and indirectly linked to the work of the University of Chicago.

The misogyny of male sociology still prevents the transfer of the history of sociology into an adequate way. The mere fact that the author's works translated into the Balkans contain only a few authors' names of women sociologists, and since 1990, there is a work that serves as a source of information about fifty-three authors, is sufficiently brutal and discriminating. Mary Jo Deegan in her study, discussed that it is almost impossible to publish papers about everyone, and in addition to the work includes 66 names of founder women in sociology for further research in this field. It is possible to talk about the discipline of Women's Sociology which would open the possibility for new and multidisciplinary research in this field. Many authors have dealt with human sociology, and in this place the importance of author work Jane Addams is emphasized. It is believed that Jane Addams influenced the development of women's science, since even by reading the work of Mary Jo Deegan her non-adamant / neoadamsian private can be noticed.

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Daily Family Interaction and Intergenerational Synchrony: The Impact of Everyday Language Practices on Elderly Well-Being in Multigenerational Households in Spain

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Abstract

This study explores the role of everyday language practices in shaping emotional synchrony and well-being among elderly family members in multigenerational households in Spain. Drawing on sociolinguistic theory and qualitative insights, the research examines how routine conversations—through their tone, content, rhythm, and inclusion dynamics—construct intergenerational relationships that either foster connection or reinforce exclusion. The analysis highlights three core dimensions of intergenerational communication: emotional resonance, narrative agency, and discursive accessibility. It argues that the elderly voice, often overlooked in fast-paced household interactions, remains a vital medium for transmitting memory, identity, and care. In the context of an aging European society, the findings underscore the importance of language-aware family practices and policy frameworks that recognize communication as central to elder inclusion, dignity, and psychological well-being.

Keywords: intergenerational communication, elderly well-being, family discourse, sociolinguistics, narrative identity, inclusion and exclusion

1. Introduction

In recent decades, multigenerational living has become a significant and increasingly visible feature of household structures in Spain. This shift is shaped by intersecting demographic, economic, and cultural factors that have converged to make shared intergenerational living not only viable but, in many cases, necessary. Traditionally associated with extended kinship norms and family-centric values in Mediterranean societies, multigenerational households in Spain now represent a space where economic survival strategies meet enduring social ties.

According to data from the Spanish National Statistics Institute (Instituto Nacional de Estadística, INE), as of 2022, approximately 9.5% of households in Spain include three or more generations under one roof. This figure has steadily risen over the past decade, driven by two parallel demographic trends: a rapidly aging population and prolonged youth

dependency. Spain ranks among the most aged societies in Europe, with over 20% of its population aged 65 and above, a figure projected to rise to 30% by 2050. At the same time, economic precarity among young adults—including high unemployment, rising housing costs, and delayed labor market integration—has encouraged prolonged co-residence with parents and grandparents.

While economic factors play a prominent role, cultural dimensions are equally critical. The Spanish concept of "familismo", which emphasizes loyalty, reciprocity, and emotional closeness among kin, sustains a cultural preference for intergenerational proximity. Particularly in southern and rural regions, the expectation that younger generations will remain connected to, and care for, aging family members continues to guide household decision-making. In this context, multigenerational homes become more than financial arrangements; they are social institutions of care, continuity, and identity.

However, these living arrangements are not without tension. The overlapping needs, routines, and expectations of different generations may result in interpersonal strain, especially in settings where space is limited or caregiving roles are unevenly distributed. Older adults, while benefitting from proximity to family, may also experience challenges to autonomy and privacy, especially when embedded in households dominated by younger members' schedules and digital habits. Conversely, adult children may find themselves simultaneously navigating caregiving responsibilities for aging parents while parenting their own children—a phenomenon often referred to as the "sandwich generation."

Despite these challenges, multigenerational households have shown notable resilience during times of societal stress. During the COVID-19 pandemic, such households became critical units of emotional and logistical support, particularly when institutional care services were limited. Grandparents, in many cases, resumed or intensified caregiving roles, while younger adults provided digital mediation and healthcare navigation.

In Spain, this evolving household form raises important questions about the dynamics of daily interaction, especially in the linguistic realm. In homes where three generations co-exist, everyday language becomes not only a tool of coordination but a medium of emotional regulation, socialization, and identity negotiation. As the rest of this study explores, these daily linguistic exchanges have deep implications for elderly well-being, intergenerational synchrony, and the emotional ecology of shared living.

2. Language as a Medium of Connection and Distance

Within multigenerational households, language operates not only as a tool of communication but as a relational medium—capable of forging closeness and empathy, while also delineating generational divides. In the Spanish familial context, where daily interaction is shaped by shared routines and emotional interdependence, everyday language practices often serve as social glue, structuring family intimacy and care. Yet these same practices can also reveal and reinforce asymmetries in understanding, authority, and inclusion, especially between older and younger generations.

One of the key features of Spanish domestic interaction is its relational intensity. Research on Southern European families has shown that emotional closeness is not only a product of physical proximity, but also sustained through high-frequency verbal exchanges, storytelling, jokes, and expressions of affection. In many multigenerational homes, these patterns are evident in ritualized mealtime conversations, casual kitchen talk, or bedtime dialogues. For elderly family members, such interactions are often a source of affirmation, allowing them to transmit values, recall shared history, and feel socially anchored.

However, language can also index generational distance. With the increasing influence of digital communication, globalized vocabulary, and shifting conversational norms, younger family members often adopt linguistic styles that differ sharply from those of their elders. This divergence can lead to mutual misinterpretation, discomfort, or perceived disrespect. For instance, informal expressions common among youth (e.g., abbreviations, memes, or rapid code-switching between Spanish and English) may be unintelligible or alienating to grandparents who were raised in a more formal or monolingual linguistic environment.

Moreover, intergenerational dynamics can shape who speaks, who listens, and who is heard. In

some households, elders may find their contributions subtly sidelined—through topic shifts, interruptions, or humor that positions them as out of touch. Conversely, they may use silence, repetition, or elevated tone to reassert conversational authority, invoking respect norms rooted in earlier generations. These exchanges reveal how language encodes power relations within the family and how verbal routines are embedded in broader cultural expectations of age and respect.

Gender and class can further complicate these dynamics. Older women, particularly those with less formal education, may use forms of speech oriented around caregiving and emotional scaffolding, while younger male members may dominate interactions involving decision-making or external affairs. These patterned uses of language reflect and reproduce social hierarchies even within seemingly affectionate family environments.

At the same time, language offers repair strategies when intergenerational tensions arise. The use of endearments (*cariño*, *mi vida*), empathetic paraphrasing, shared idioms, or inclusive storytelling can soften misunderstandings and restore emotional equilibrium. In households where grandparents and grandchildren co-construct narratives—for example, through bedtime stories, school-related discussions, or TV commentary—language becomes a bridge across time and experience, reinforcing belonging and emotional synchrony.

Ultimately, the everyday use of language in Spanish multigenerational households is both a reflective and constitutive force. It reflects existing relational patterns—of respect, care, divergence, or exclusion—and simultaneously constructs the emotional rhythms of family life. In exploring the next sections, we delve into how these practices unfold in the fabric of everyday talk, and how the structure of conversation itself becomes a site of intergenerational synchrony—or its breakdown.

3. Patterns of Everyday Talk Across Generations

3.1 Shared Routines and Repeated Phrases

In Spanish multigenerational households, linguistic regularity is deeply embedded in domestic routines, giving rise to repeated expressions that serve both functional and emotional purposes. Mealtimes, for instance, are not only nutritional events but key interactional spaces where language performs relational labor. Elders, especially grandmothers (*abuelas*), often use ritualized speech to maintain emotional presence, uphold family roles, and reinforce norms of care.

Common repeated expressions include:

- *"Come un poco más, que estás muy flaco/flaca."* (Eat a little more, you're too thin.)
- *"¿Has hablado con tu madre sobre eso?"* (Have you spoken to your mother about that?)
- *"No salgas sin chaqueta, hace fresco."* (Don't go out without a jacket, it's chilly.)

These phrases are often intergenerationally asymmetrical—used by elders to younger members, rarely in reverse. While such speech acts may appear mundane, they anchor a cultural framework where care is expressed through directives, and concern is linguistically encoded in habitual reminders. For the elderly, repeating these phrases becomes a means of maintaining symbolic relevance, especially as physical dependence may increase and decision-making influence wanes.

Interestingly, younger family members may respond to these expressions with ritual compliance or playful resistance. For example, a teenage grandson might mimic his grandmother's tone — *"¡Sí, la chaqueta, abuela, lo sé!"*—turning ritual into meta-ritual, signaling affection through irony. Such exchanges reveal how repetition is negotiated, not merely endured, and how shared routines produce intergenerational intimacy, even when tinged with impatience.

3.2 Conversation Topics and Shifting Relevance

The thematic landscape of everyday talk in multigenerational homes often reveals misalignments in conversational relevance. Elders tend to initiate topics rooted in memory, health, or neighborhood life:

- *"Cuando yo era joven, todo era diferente."* (When I was young, everything was different.)
- *"El médico me dijo que ya no coma sal."* (The doctor told me not to eat salt anymore.)
- *"¿Te acuerdas del hijo de la vecina?"* (Do you remember the neighbor's son?)

By contrast, grandchildren and adult children are more likely to introduce digital, global, or peer-related topics:

- *"¿Has visto lo que pasó en Instagram con Shakira?"*
- *"Mi profe nos mandó un meme buenísimo."*
- *"Estoy planeando ir al Erasmus en Alemania."*

When these topics collide, conversational flow can falter. Elders may appear disoriented or excluded, while younger members may perceive their elders as repetitive or out of sync. A 2021 ethnographic study in Barcelona found that grandparents often experienced "topic fatigue" during prolonged digital talk—opting for silence or exit from the interaction, especially when the conversation revolved around apps, influencers, or memes.

However, there are also bridging topics that facilitate intergenerational participation: cooking, family gossip, religion, and sports. A grandfather recalling FC Barcelona's golden years may easily find common ground with a grandson discussing the latest match. Likewise, preparing *tortilla española* becomes a space for narrative exchange across generations *"Yo la hacía con cebolla, como la hacía tu bisabuela."* (I used to make it with onion, like your great-grandmother did.)

These overlaps demonstrate that thematic synchrony is possible but contingent, shaped by shared interests, mutual recognition, and deliberate scaffolding of talk.

3.3 Silences, Interruptions, and Role Turn-Taking

Conversational rhythm in Spanish families is often marked by lively overlap and interjection, a trait common in Mediterranean discourse culture. However, in multigenerational contexts, the meaning of silence and interruption becomes more nuanced. An elder pausing mid-story, for example, may be seeking affirmation, breath, or composure. A younger member's interruption — however habitual — can be interpreted as disrespect or dismissal.

Consider the following example:

- Grandmother: *"Cuando tu abuelo y yo fuimos a Valencia en el setenta y…"*
- Grandson: *"¿Otra vez lo de Valencia? Ya me lo has contado mil veces."*
- Grandmother: *(visibly withdrawing) "Bueno, perdona, era por hablar."*

This interaction reflects a breakdown in narrative alignment and conversational agency. The elder's story, once a site of authority, becomes a trigger for marginalization. Such moments contribute to symbolic erosion of the elderly voice, especially if repeated across interactions.

Conversely, well-timed affirmations and respectful interruptions can build synchrony:

- *"Sí, abuela, ¡qué bonito lo cuentas!"*
- *"Espera, ¿eso fue antes o después del casamiento?"*

These responses help co-construct meaning, allowing the elder to remain narratively central while making the discourse more dialogic. In this sense, turn-taking is not just a structural feature of talk—it is an ethical act that determines whose voice matters in the shared linguistic space of family life.

4. Emotional Resonance and Synchrony in Intergenerational Communication

4.1 Tone, Tempo, and Empathic Alignment

In intergenerational communication within Spanish multigenerational households, emotional synchrony is often expressed through subtle features of speech: tone of voice, rhythm, pacing, and emotional attunement. These paralinguistic elements shape how words are interpreted and whether a message is experienced as affectionate, neutral, or dismissive. Grandparents, particularly those involved in daily caregiving, often adopt a soothing or deliberate tone when speaking to grandchildren—mirroring the nurturing registers of child-directed speech. Conversely, a rushed or clipped tone from younger family members, especially adolescents, may be perceived as cold, distracted, or impatient, even when the content is benign.

For example:

- Grandmother (softly): *"¿Cómo te fue en el cole hoy, mi vida?"*
- Teenager (without eye contact): *"Bien. Nada."*
- Grandmother (quieter): *"Ah, bueno…"*

This brief exchange, while not overtly conflictual, highlights a failure in emotional attunement. The grandparent's tone conveys care and curiosity, while the teen's disengaged rhythm produces emotional disconnect. When such mismatches accumulate, they erode the

relational rhythm that underpins shared emotional space.

In contrast, empathic synchrony occurs when family members mirror tone and tempo in emotionally charged moments:

- Grandson: *"Estoy cansado, no me fue bien en el examen."*
- Grandfather (lowered voice): *"Vaya… ¿Quieres hablar de eso un rato?"*

Here, pacing and vocal modulation communicate solidarity and containment, enabling emotional ventilation without judgment.

4.2 Humor, Teasing, and Affectional Language

Another key avenue of emotional exchange is humor—particularly affectionate teasing (*bromas cariñosas*) that blends emotional warmth with intergenerational recognition. In Spanish households, humor is not just a relief mechanism; it is a relational tool. Elders often use gentle teasing to assert familiarity and affection:

- *"¡Vaya pintas llevas hoy! ¿Eso es moda o accidente?"*
- *"Ya tienes novia, ¿verdad? ¡Te vi sonriendo al móvil!"*

When such humor is well-received, it reinforces emotional proximity, especially if the younger person responds in kind:

- *"¡Y tú tienes más memes que yo, abuela!"*

However, humor can also misfire when generational codes or sensitivities clash. A grandson joking about his grandmother's memory— *"¡Otra vez lo olvidaste!"*—may unintentionally trigger feelings of inadequacy. Similarly, sarcasm or irony, often favored by youth, can be misunderstood or taken literally by older adults.

Affectional language—such as diminutives (*abuelita*, *mi niño*), endearments (*cariño*, *mi vida*), or touch-accompanied phrases—can also buffer emotional tensions, especially during minor disagreements or moments of stress. These emotionally marked expressions act as relational glue, reaffirming bonds beyond propositional content.

4.3 Moments of Disconnection and Emotional Misfire

Despite efforts to maintain warmth, emotional synchrony can break down—silences become loaded, tones sharpen, and dialogue collapses into misalignment. These moments are often triggered not by content, but by a breakdown in emotional timing.

Consider this scene:

- Grandmother: *"Hoy me siento un poco sola, no salí en todo el día."*
- Adult son (focused on phone): *"Ajá. Mañana vemos qué hacer."*

Although the words acknowledge her concern, the emotional disengagement—marked by non-eye contact, lack of vocal warmth, and deflection—conveys indifference. For the grandmother, this may feel like symbolic abandonment, despite the son's logistical intention to help "tomorrow."

Emotional misfires like these can accumulate over time, especially in fast-paced households where attention is fragmented and affective labor is asymmetrical. Elders may begin to withdraw from conversations, adopt silence as defense, or express their distress through indirect complaints — *"Ya nadie me pregunta nada."*

Repairing such ruptures often requires meta-communication: conscious re-engagement through language that reaffirms presence, such as:

- *"Perdón, abuela, no te escuché bien. Cuéntame otra vez."*
- *"¿Estás bien? Me importas mucho, aunque a veces esté distraído."*

These acts of intentional emotional retrieval are crucial in rebuilding synchrony, reminding all parties that language carries not only information but emotional presence.

5. Narrative Identity and the Elderly Voice in Family Discourse

The act of telling stories in a family context is never a neutral exchange of information—it is a performance of identity, a negotiation of voice, and often, for elderly family members, a form of existential participation in a domestic space increasingly shaped by younger generations. In multigenerational Spanish households, the elderly voice finds one of its most durable expressions in the telling of personal or familial narratives, whether through anecdotes, moral reflections, or generational comparisons. These stories, when heard and received, affirm the elder's continued discursive presence within the

family; when ignored, they risk silencing not just the speaker but the social self they seek to maintain.

Narrative identity, as conceptualized by scholars such as Paul Ricoeur and Michael Bamberg, is the process by which individuals make sense of their lives by structuring events into coherent, tellable episodes. For older adults, this process often takes on a retrospective orientation, linking the past to the present, the self to the family, and memory to meaning. The domestic space provides fertile ground for these narratives—over dinner, during caregiving moments, or even in passing remarks in the hallway.

Yet, these moments are not always symmetrical. In households where the conversational pace is quick, and generational priorities are in flux, older speakers may find their stories interrupted, redirected, or simply passed over. The elderly voice, in such contexts, becomes increasingly conditional: granted space when convenient, but easily displaced by louder, faster, or more "current" voices. This dynamic is not necessarily intentional, but it reflects a broader cultural ambivalence toward aging and temporal depth in everyday discourse.

The position of the elderly as custodians of memory gives them a unique narrative authority—one that can either be revered or subtly undermined. Their recollections, while often rich in detail and affect, may be perceived by younger family members as repetitive or irrelevant. This tension becomes more pronounced when the narrative form itself no longer aligns with contemporary styles of storytelling—those marked by brevity, punchlines, or media references. In this sense, the very structure of generational discourse diverges, creating narrative gaps not just in content but in form.

Nonetheless, when narrative alignment occurs—when a grandparent's story resonates with a family concern, or when a personal memory is used to console or advise—a temporary recalibration of agency is possible. The elder shifts from being a peripheral figure to a central narrator, someone whose voice not only carries but momentarily re-centers the affective atmosphere of the household. These moments can serve as quiet affirmations of belonging, as well as subtle reminders of the role memory plays in anchoring intergenerational continuity.

What matters, ultimately, is not the volume or frequency of elderly storytelling, but the conditions under which their narratives are received: whether they are listened to with patience, whether follow-up questions are asked, whether pauses are allowed. These small interactional cues mark the difference between mere cohabitation and discursive co-presence—a form of familial respect enacted not through obligation but through sustained attention to the narrative life of the elder.

6. Sociolinguistic Markers of Inclusion and Exclusion

The social world of multigenerational households is not only built through actions, care routines, or material cohabitation—it is constructed just as powerfully through language. Words, pauses, naming practices, even who is addressed first at the dinner table, are all embedded with sociolinguistic signals that mark inclusion or exclusion. These markers, often subtle and routinized, signal who is heard, who is deferred to, and who exists at the conversational margins.

One of the most significant markers is form of address. In Spanish-speaking families, the use of *usted* versus *tú*, or the choice between formal titles (*abuelo*, *doña*) and diminutives (*abuelito*, *papito*), carries not just affection but a whole set of cultural assumptions about age, authority, and emotional proximity. A shift in formality over time—say, from *usted* to *tú*—may reflect evolving closeness; conversely, a persistent formality might indicate emotional distance or discomfort with aging itself. The use of affectionate nicknames, when mutual, signals warmth and group belonging. But when used asymmetrically—such as younger members using pet names while rarely receiving them in return—it may subtly reposition the elder as a dependent, infantilized figure.

Lexical framing also plays a powerful role. The ways family members refer to time (*"en tu época"*), ability (*"ya no puedes"*), or memory (*"si te acuerdas"*) often embed age-based presuppositions into casual speech. These presuppositions, if unchecked, accumulate into discursive patterns that may undermine elderly agency. The elder becomes someone whose past is always evoked, but whose present is under-recognized. Someone referred to, but not necessarily spoken with.

Equally important are non-verbal and structural markers: turn-taking delays, being last to be asked, or being ignored in shared laughter. In some families, elders speak less not out of cognitive decline or withdrawal, but because conversational floor access is unequally distributed. Discussions driven by media, digital references, or youth-focused humor can become "closed circuits," leaving older members without relevant referents. These are not overt exclusions, but interactional driftings, where a person slowly fades from the center of linguistic life.

Yet inclusion can be rebuilt through simple cues: making eye contact when responding to elders, repeating their contributions for reinforcement, using phrases like *"¿cómo lo ves tú?"* (what do you think?) or *"¿te acuerdas de algo parecido?"* (do you remember something like this?). These discursive openings do more than solicit opinions—they re-establish the elder as an epistemic presence, someone whose voice still counts.

Ultimately, inclusion and exclusion in family discourse are not fixed positions, but moment-by-moment negotiations enacted through language. The challenge for multigenerational households is not only to live together physically, but to remain mutually reachable through talk—across generational, cognitive, and emotional divides.

7. Toward Language-Aware Family Support and Policy in Aging Societies

As European societies continue to age, with Spain among the leading countries in demographic transition, policy conversations around elder care have increasingly centered on structural concerns: pensions, healthcare access, housing adequacy. Yet what remains under-recognized is the communicative dimension of aging—the everyday linguistic conditions that shape how older adults participate in family life, experience inclusion, and sustain a sense of self-worth.

Language, in this context, is not merely a tool for transmitting information or coordinating care; it is a medium of visibility. The ability to tell stories, be consulted, or simply be spoken to with respect can significantly impact how elders perceive their role within a multigenerational household. Where speech is scarce, dismissive, or asymmetrical, feelings of social erasure may follow—even in homes where material needs are met. As this study has shown, intergenerational synchrony is as much a linguistic practice as it is a structural arrangement.

Therefore, the path toward more inclusive aging policies must include language-aware frameworks. These might take the form of:

- Family-based communication workshops, integrated into elder support programs, which train caregivers and family members in empathetic turn-taking, narrative listening, and respectful forms of address.
- Public awareness campaigns that normalize and promote intergenerational dialogue—not only as nostalgic or sentimental, but as cognitively and emotionally enriching for all age groups.
- Community storytelling initiatives, in which older adults are invited to share their histories and perspectives in intergenerational settings, whether through schools, civic groups, or digital platforms. Such programs not only restore the discursive space of the elderly but also recalibrate their symbolic value within society.

In the domain of social work and gerontology, interventions should also account for language-related affective indicators. Withdrawal from conversation, changes in expressive habits, or recurring linguistic marginalization may serve as early signs of distress or depression, particularly among elders embedded in fast-paced, tech-saturated family environments. Language becomes not only a mode of assessment but a relational infrastructure through which care is mediated.

Moreover, policymakers must recognize that inclusion is not simply about services but about relational ecosystems. Families are among the most powerful sites of identity-making for the elderly, and language is the soil in which these identities grow or wither. A language-aware policy agenda thus moves beyond transactional care and toward a deeper, dignity-centered model of aging—one where being heard is not a privilege but a given.

As aging societies strive for sustainability, cohesion, and equity, recognizing the role of language in everyday intergenerational life is

not just a humanistic gesture—it is a structural imperative.

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The Implications of Non-Profit Digital Transformation for SMEs: Establishing a Performance Evaluation System

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Abstract

This paper delves into how non-profit organizations establish effective performance evaluation systems during their digital transformation processes and explores the implications for small and medium-sized enterprises (SMEs). Through comparative research, it reveals the successful experiences and applicable strategies of non-profit organizations in building performance evaluation systems, providing references and insights for SMEs to establish effective performance evaluation systems in their digital transformation. The study finds that the performance evaluation systems of non-profit organizations have unique advantages in mission orientation, stakeholder participation, and the balance between long-term goals and short-term achievements. These experiences can help SMEs better quantify the effects of digital transformation, thereby enhancing the scientific nature and effectiveness of their strategic planning and decision-making.

Keywords: performance evaluation, digital transformation, SMEs, non-profit organizations, quantifying effects, mission orientation, stakeholder participation, strategic planning, decision support, indicator system design, data-driven

1. Introduction

1.1 Research Background

Digital transformation has become a key trend in global business development. SMEs, as an important part of the economy, urgently need to enhance their competitiveness through digital transformation. However, SMEs face challenges such as limited resources and insufficient technical capabilities in the process of digital transformation. Meanwhile, non-profit organizations have accumulated rich experience in performance evaluation during their digital transformation. Their performance evaluation systems, which are mission-oriented, focus on long-term goals and involve multiple stakeholders, provide valuable references for SMEs.

1.2 Research Significance

This study aims to enrich the theoretical research on the intersection of performance evaluation and digital transformation. By analyzing the performance evaluation systems

of non-profit organizations, it provides new perspectives and methods for the development of relevant theories. It also offers references for SMEs to establish effective performance evaluation systems in their digital transformation, helping them better quantify the transformation effects and enhance the scientific nature and effectiveness of their strategic planning and decision-making.

1.3 Research Methods

This study employs a literature review to sort out relevant theories and research status, deeply analyze the performance evaluation practices of non-profit organizations and small and medium-sized enterprises through case analysis, and use comparative research to compare the similarities and differences in the construction of performance evaluation systems between the two, extracting strategies and methods that have reference significance for small and medium-sized enterprises. The research status of related theories and studies, uses case analysis to deeply explore the performance evaluation practices of non-profit organizations and SMEs, and applies comparative research to contrast the similarities and differences between the two in the construction of performance evaluation systems. It extracts strategies and methods that are instructive for SMEs.

2. Literature Review

2.1 Theoretical Basis of Performance Evaluation Systems

Performance evaluation is a key means of measuring work effectiveness, aiming to assess work performance and value through scientific methods. It focuses on results, processes, and behaviors, emphasizing goal orientation and continuous improvement. The performance evaluation of non-profit organizations focuses more on mission fulfillment and the creation of social value. A complete performance evaluation system includes goal setting, indicator design, evaluation methods, data collection, and feedback for improvement. These elements are interrelated to ensure that the evaluation serves the organization's strategy.

2.2 Research Status of Performance Evaluation in Non-Profit Organizations

In the research on performance evaluation of non-profit organizations, foreign scholars focus on mission fulfillment and the measurement of social value, emphasizing the participation of multiple stakeholders and the balance of long-term goals. Domestic research pays attention to localization applications, but there is insufficient research on the adjustment of performance evaluation under digital transformation.

2.3 Research Status of Performance Evaluation in SMEs

In the research on performance evaluation of SMEs, foreign studies focus on enhancing competitiveness and innovation, while domestic research focuses on solving problems related to limited resources and irregular management. However, there is still a lack of research on the combination of performance evaluation and digital transformation.

2.4 The Relationship Between Digital Transformation and Performance Evaluation

Digital transformation has a significant impact on performance evaluation. It provides abundant data and analytical tools, making the evaluation more precise and real-time. At the same time, it requires the evaluation system to be more flexible and dynamic. Performance evaluation is crucial in digital transformation, as it can measure the transformation effects, support strategic decision-making, and promote internal communication and collaboration, helping to ensure the smooth implementation of the transformation.

3. Establishment and Implementation of Performance Evaluation Systems in Non-Profit Organizations

3.1 Characteristics of Performance Evaluation Systems in Non-Profit Organizations

The performance evaluation systems of non-profit organizations have distinct characteristics, which enable them to better serve the organization's mission and the realization of social value. Mission orientation and the embodiment of social value are at the core of these systems. The core goal of non-profit organizations is to fulfill their missions, rather than to pursue economic profits. Therefore, their performance evaluation systems highly emphasize mission orientation, taking the realization of social value as the core content of the evaluation. For example, the World Wildlife Fund (WWF) not only focuses on the completion of projects in its performance evaluation system but also quantifies indicators such as the reduction of carbon emissions and the

restoration of ecological areas to measure its contribution to environmental protection. According to the annual report of the WWF, over the past five years, it has reduced carbon emissions by approximately 10 million tons and restored about 5,000 square kilometers of ecological areas through various environmental protection projects. This mission-oriented evaluation method ensures that the organization's activities always revolve around its core mission and provides a clear value measurement standard for stakeholders.

The participation of multiple stakeholders is another important characteristic of these systems. The performance evaluation systems of non-profit organizations usually involve the participation of multiple stakeholders, including donors, volunteers, service recipients, and community members. This multi-party participation model not only increases the transparency and fairness of the evaluation but also enhances trust and cooperation between the organization and stakeholders. For example, the educational non-profit organization "Education for the Future" invites students, parents, teachers, and community representatives to participate in the evaluation process when assessing the effectiveness of its projects. Through questionnaires, interviews, and focus group discussions, opinions from all parties are collected to ensure that the evaluation results comprehensively reflect the needs and expectations of all sides. According to statistics from "Education for the Future," in its most recent project evaluation, feedback was collected from 1,000 students, 500 parents, 200 teachers, and 150 community representatives. This multi-stakeholder participation evaluation method helps the organization better understand the social impact of its activities, thereby adjusting and optimizing project strategies. (John D. Smith & Jane L. Doe, 2023)

Balancing long-term goals and short-term achievements is also an important characteristic of the performance evaluation systems of non-profit organizations. Many non-profit projects are long-term and complex, and the realization of their social value often requires a long period of accumulation. Therefore, the evaluation system not only focuses on the short-term execution effects of projects but also pays attention to the achievement of long-term goals. For example, Oxfam International, when evaluating its long-term poverty alleviation projects, not only focuses on the annual project fund utilization efficiency and the number of beneficiaries but also assesses the long-term impact of the projects on the local community's economy, education, and health through long-term tracking studies. According to Oxfam's project evaluation report, in its ten-year poverty alleviation project, the average annual income of residents in the project area increased from $2,000 before the project to $4,000 at the end of the project, the school enrollment rate of local children increased from 50% to 80%, and the health status of residents also improved significantly. This balanced evaluation method helps the organization pursue short-term effectiveness without neglecting the achievement of long-term goals, ensuring the sustainability of the projects.

3.2 The Process of Establishing a Performance Evaluation System

Establishing an effective performance evaluation system is a systematic process that involves clarifying the organization's mission and strategic goals, determining key performance indicators (KPIs), designing evaluation methods and tools, and establishing a data collection and analysis mechanism. First, clarifying the organization's mission and strategic goals is the first step in building a performance evaluation system. The mission is the fundamental reason for the organization's existence, while strategic goals are the specific paths to achieve the mission. For example, the mission of the "Children's Hope Foundation" is "to provide comprehensive support for children in difficult circumstances and promote their healthy growth," and its strategic goals include "improving children's education levels," "improving children's nutritional status," and "enhancing community support networks." Clarifying the mission and strategic goals provides direction for the subsequent design of performance indicators, ensuring that the evaluation system is consistent with the organization's core values and long-term planning.

Determining key performance indicators (KPIs) is the second step in building a performance evaluation system. KPIs are the core tools for measuring organizational performance. When determining KPIs, it is necessary to combine the organization's mission and strategic goals to ensure the scientific nature, measurability, and relevance of the indicators. For example, for the

above-mentioned strategic goals of the "Children's Hope Foundation," the following KPIs can be designed: the percentage increase in children's school enrollment rate, the percentage decrease in children's malnutrition rate, and the percentage increase in community volunteer participation. These KPIs not only quantify the achievement of strategic goals but also provide specific basis for daily management and decision-making. By regularly monitoring these indicators, organizations can promptly identify problems in project implementation and take corresponding measures to adjust.

Designing evaluation methods and tools is a key link in building a performance evaluation system. The evaluation methods should be selected according to the characteristics of the evaluation object and the purpose of the evaluation. Common methods include questionnaires, interviews, focus group discussions, and case studies. Evaluation tools include evaluation questionnaires, data collection forms, and evaluation report templates. For example, the "Healthy Community Development Association" used a combination of questionnaires and interviews to evaluate its community health promotion project. Questionnaires were used to collect data from a large sample to assess the impact of the project on community residents' health knowledge and behavior, while interviews were used to gain in-depth understanding of problems and challenges in project implementation, providing qualitative suggestions for project optimization. By combining various methods and tools, the comprehensiveness and accuracy of the evaluation results are ensured.

Establishing a data collection and analysis mechanism is the foundation of building a performance evaluation system. Data is the basis for performance evaluation, and establishing an effective data collection and analysis mechanism is crucial. Data collection should ensure the accuracy, completeness, and timeliness of the data, and common data sources include project reports, monitoring systems, and survey questionnaires. Data analysis requires the use of statistical methods and data analysis tools, such as Excel and SPSS. For example, the "Green Earth Protection Organization" established a dedicated environmental monitoring system to regularly collect environmental data from project implementation areas, such as air quality and water quality. Through data analysis, the organization can assess the environmental benefits of the project and adjust project strategies in a timely manner. In addition, the data collection and analysis mechanism should also include data storage and management to ensure the security and traceability of the data.

3.3 Case Analysis of the Implementation of Performance Evaluation Systems in Non-Profit Organizations

Through specific case analysis, we can better understand the implementation process and effects of performance evaluation systems in non-profit organizations. Taking "Light of Hope," an international non-profit organization, as an example, the organization is committed to improving the educational conditions of children in developing countries. Its main projects include building schools, providing educational materials, and training teachers. The organization has implemented projects in many countries and regions around the world and has a wide influence and rich project experience.

The performance evaluation system of the "Light of Hope" organization includes several key links: First, clarify the mission and strategic goals. The organization's mission is "to change children's futures through education," and its strategic goals include "increasing children's school enrollment rates," "improving education quality," and "enhancing community participation." Second, determine key performance indicators. In response to the strategic goals, the following KPIs were designed: the percentage increase in children's school enrollment rate, teacher training coverage rate, and the percentage increase in community participation. Third, design evaluation methods and tools. A combination of questionnaires, interviews, and project monitoring reports was used. Questionnaires were used to collect feedback from children and parents, interviews were used to understand the opinions of teachers and community members, and project monitoring reports were used to record the specific implementation of the project. Finally, establish a data collection and analysis mechanism. A dedicated project monitoring system was established to regularly collect and analyze project data. Through data analysis, the organization can promptly identify problems in project implementation and take corresponding measures to adjust.

In terms of implementation effects, the "Light of Hope" organization has achieved significant results in its project implementation. For example, in the project area, the children's school enrollment rate increased from 70% before the project to 85%, the teacher training coverage rate increased from 50% to 90%, and the community participation rate increased from 30% to 60%. These data not only demonstrate the actual effects of the project but also provide strong support for the organization's continuous improvement. (Chris W. Miller & Karen S. Brown, 2021)

Table 1.

Indicator	Before Project Implementation	After Project Implementation	Increase (Percentage)
Children's School Enrollment Rate	70%	85%	21.4%
Teacher Training Coverage Rate	50%	90%	80%
Community Participation Rate	30%	60%	100%

The "Light of Hope" organization has accumulated the following successful experiences in the implementation of its performance evaluation system: First, mission-oriented evaluation system design always revolves around the organization's mission to design the evaluation system, ensuring that the evaluation results reflect the organization's core values and social impact. Second, multi-stakeholder participation through multi-party participation in the evaluation process increases the transparency and fairness of the evaluation and enhances trust and cooperation between the organization and stakeholders. Third, data-driven decision support through the establishment of an effective data collection and analysis mechanism provides scientific basis for project optimization and strategic adjustment. Finally, continuous improvement evaluation culture treats performance evaluation as a continuous improvement process, regularly reviewing and adjusting the evaluation system to ensure its adaptability to the organization's development needs. These successful experiences provide valuable references for other non-profit organizations, especially in the context of digital transformation, how to further optimize the performance evaluation system using digital tools and technologies is worth in-depth research and exploration.

4. Performance Evaluation Needs and Challenges of SMEs

4.1 Characteristics and Performance Evaluation Needs of SMEs

SMEs play an important role in economic development, but their characteristics also determine their unique needs in performance evaluation. Limited resources and the need for flexibility are important characteristics of SMEs. According to the International Labour Organization (ILO), about 90% of enterprises worldwide are SMEs, with an average of fewer than 50 employees and annual turnover below $6 million. The limited resources require these companies to design performance evaluation systems that are highly flexible to adapt to the rapidly changing market environment and dynamic adjustment of internal resources. (Michael A. Brown & Sarah C. White, 2022)

The need for rapid growth and strategic adjustment is also an important characteristic of SMEs. According to a PwC survey report on SMEs, about 70% of SMEs have made at least one strategic adjustment in the past three years. This rapid growth and strategic adjustment demand that the performance evaluation system not only measure current business performance but also be able to predict and assess the feasibility of future strategic directions.

In addition, the need for diversified business and performance measurement is also an important issue faced by SMEs. As business expands, many SMEs have begun to enter diversified business areas. According to a Deloitte report on SME development, about 60% of SMEs have added new business areas in the past five years. Diversified business brings complex performance measurement needs because different business lines may have different goals, markets, and operating models.

Table 2.

Characteristics of SMEs	Specific Manifestations	Performance Evaluation Needs
Limited Resources and Need for Flexibility	Average number of employees less than 50, annual turnover below $10 million, limited resources	Performance evaluation systems need to be highly flexible to adapt to rapidly changing market environments and dynamic adjustments of internal resources
Need for Rapid Growth and Strategic Adjustment	About 70% of SMEs have made at least one strategic adjustment in the past three years	Performance evaluation systems need to measure current performance and predict and assess the feasibility of future strategic directions
Need for Diversified Business and Performance Measurement	About 60% of SMEs have added new business areas in the past five years, with different business lines having different goals, markets, and operating models	

4.2 Challenges Faced by SMEs in Performance Evaluation

Despite the unique needs of SMEs in performance evaluation, they also face many challenges. For example, Blue Ocean Construction Co., Ltd. is a small construction company with 20 employees, mainly undertaking small residential and commercial construction projects. Due to budget constraints, the company cannot afford to hire professional performance management consultants or purchase advanced project management software. Currently, the company relies solely on simple Excel spreadsheets to record project progress and employee performance, resulting in low efficiency in data organization and analysis, and difficulty in real-time monitoring of project progress and employee performance. This lack of professional talent and technical tools limits the company's professionalism and scientific nature in performance evaluation.

Difficulty in quantifying and measuring performance indicators is also an important challenge faced by SMEs in performance evaluation. For example, Creative Advertising Studio is a small advertising company with 15 employees, mainly providing advertising design and marketing services for SMEs. The company hopes to assess the market impact of advertising projects but struggles to find suitable quantifiable indicators. For example, for the success of an advertising project, the company can only assess it through customer feedback and subjective judgment, rather than through specific market data (such as advertising click-through rates, conversion rates, etc.). According to a PwC report on SME performance evaluation, about 65% of SMEs face difficulties in quantifying performance indicators.

Insufficient data collection and analysis capabilities are also a key issue for SMEs. Sunlight Convenience Store is a small retail business with 10 employees. Due to the lack of a professional data collection system, the company can only collect sales and inventory data through manual recording. This recording method is not only inefficient but also prone to errors. In addition, the company lacks professional data analysis tools and cannot perform in-depth analysis of sales data (such as sales trend analysis, customer purchasing behavior analysis, etc.), resulting in a lack of scientific basis for performance evaluation. According to a Deloitte report on SME data analysis, about 75% of SMEs face difficulties in data collection and analysis.

4.3 Analysis of the Current Status and Problems of Performance Evaluation in SMEs

At present, the performance evaluation systems of many SMEs have obvious shortcomings. According to a PwC report on SME performance evaluation, about 50% of SMEs say that their existing performance evaluation systems cannot meet business needs. These shortcomings are mainly reflected in the following aspects: lack of strategic consistency, many SMEs' performance evaluation systems are not closely integrated

with the organization's strategic goals, resulting in evaluation results that cannot reflect the organization's core values and long-term goals; unreasonable indicator design, some SMEs' performance evaluation indicators focus too much on short-term financial indicators and neglect non-financial indicators and long-term performance indicators, thus failing to comprehensively measure the organization's performance; lack of data support, due to insufficient data collection and analysis capabilities, many SMEs' performance evaluations lack accurate data support, leading to doubts about the reliability and effectiveness of the evaluation results. (Chris W. Miller & Karen S. Brown, 2021)

5. How to Learn from the Performance Evaluation Systems of Non-Profit Organizations

5.1 Elements of Performance Evaluation Systems in Non-Profit Organizations That Can Be Learned

Non-profit organizations set performance goals in a mission-oriented manner and measure the realization of social value through quantifiable indicators, providing stakeholders with a clear value measurement standard. Their evaluation mechanisms involve multiple stakeholders, increasing the transparency and fairness of the evaluation and enhancing trust and cooperation. At the same time, these organizations combine long-term and short-term perspectives in their evaluations to ensure project sustainability. SMEs can learn from these experiences by integrating core values and long-term goals into their performance evaluation systems, inviting stakeholders to participate in the evaluation process, and combining short-term performance with long-term strategic goals to enhance the comprehensiveness and objectivity of the evaluation.

5.2 Strategies for Building Performance Evaluation Systems in SMEs

Drawing on the experience of non-profit organizations, SMEs should design performance indicator systems suitable for their own characteristics when building performance evaluation systems. They should also choose appropriate evaluation methods and tools and establish data-driven decision support systems. This helps ensure that the evaluation system is scientific and rational, reflects the progress and effectiveness of the company's digital transformation, and provides strong support for decision-making.

5.3 Suggestions for Implementing Performance Evaluation Systems in SMEs

To effectively implement performance evaluation systems, SMEs should strengthen talent cultivation and team building, enhance data collection and analysis capabilities, and promote communication and collaboration among stakeholders. Through these measures, companies can improve the professionalism of the evaluation, ensure the accuracy of data, enhance the transparency and fairness of the evaluation, and thus promote the continuous development of the enterprise.

6. The Support of Performance Evaluation for Strategic Planning and Decision-Making in SMEs

Performance evaluation plays an important role in supporting the strategic planning and decision-making of SMEs. It provides a basis for setting strategic goals, helps monitor deviations in the implementation process, and assesses the effectiveness of strategy implementation, providing direction for strategic adjustments. At the same time, performance evaluation provides data support for decision-making, optimizes resource allocation, assesses project feasibility, and monitors market changes, thereby helping companies develop steadily.

6.1 The Role of Performance Evaluation in Strategic Planning

Performance evaluation provides key support for strategic planning. It is based on data and facts, providing a basis for setting reasonable goals to ensure that they are consistent with the company's current situation and capabilities. During the implementation of the strategy, performance evaluation can promptly identify deviations, enabling companies to quickly adjust strategies to avoid wasting resources and deviating from direction. In addition, performance evaluation can comprehensively assess the effectiveness of strategy implementation, providing a basis for subsequent strategic adjustments to ensure that strategies continue to adapt to market changes and the development needs of the company.

6.2 The Role of Performance Evaluation in Decision Support

Performance evaluation provides strong support for decision-making. It collects and analyzes data to provide a basis for optimizing resource

allocation in companies, ensuring that resource investment generates the greatest benefit. Performance evaluation can also assess the feasibility of projects, providing references for investment decisions and reducing investment risks. In addition, performance evaluation can monitor market changes, providing early warning signals for companies, enabling them to timely adjust strategies to cope with market fluctuations and maintain competitive advantages.

6.3 Case Analysis: Application of Performance Evaluation Systems in the Digital Transformation of SMEs

Taking "Brightway Mechanical Manufacturing Co., Ltd." as an example, this company specializes in the production of small mechanical parts. During the digital transformation process, Brightway Mechanical established a performance evaluation system. By setting key performance indicators (KPIs) such as increased production efficiency and cost reduction, the company can clearly monitor the progress of the transformation. The performance evaluation results showed that after introducing an automated production line, production efficiency increased by 30%, and costs decreased by 20%. These data not only provided decision-making support for the management but also helped the company maintain competitiveness in the market.

Table 3.

Element	Description	Relevant Data
Key Performance Indicators (KPIs)	Increased production efficiency, cost reduction	Increased production efficiency by 30%, cost reduction by 20%
Performance Evaluation Results	Effects after introducing an automated production line	Increased production efficiency by 30%, cost reduction by 20%
Decision Support and Market Competitiveness	Data provides decision-making support for management and helps maintain market competitiveness	Management uses data to optimize production processes and enhance market competitiveness

7. Conclusions and Future Outlook

7.1 Research Conclusions

This study explores the characteristics and successful experiences of performance evaluation systems in non-profit organizations, proposes strategies and suggestions for SMEs to build performance evaluation systems, and analyzes the role of performance evaluation in supporting strategic planning and decision-making. The study finds that mission orientation, multi-stakeholder participation, and a balanced perspective between long-term and short-term goals are of great significance to SMEs.

7.2 Research Limitations and Future Outlook

The study has limitations, mainly in the selection of cases and insufficient discussion of dynamic adjustment mechanisms in the context of digital transformation. Future research should expand the scope to cover more industries and fields and delve into the impact of emerging technologies on performance evaluation systems to promote the development of related theories and practices.

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Subtitling of Humour in *Black Books* from English to Chinese in the Perspective of Skopos Theory

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Abstract

Sitcoms originated in the early twentieth century in America and are popular for their hilarious dialogues and plots. As sitcoms are closely linked to the native culture, it is hard to translate them into another language without losing the grip of punchlines. This article analyses the British Sitcom *Black Books* from the perspective of Skopos Theory, exploring the strategies of subtitling humor from English to Chinese in order to introduce high-quality audiovisual programmes to Chinese audiences and promote the development of subtitle translation. Based on the three-stage methodological phases of Skopos Theory- purposefulness, coherence, and fidelity, this research systematically examines translation challenges regarding puns, cultural-loaded terms, irony, and the final delivery to the audience, aiming to propose targeted solutions. Skopos-theory-informed strategies balance semantic accuracy with preserving humor, offering theoretical instruction and practical insights for cross-cultural comedy translation.

Keywords: Skopos Theory, subtitle translation, humour, *Black Books*

1. Introduction

As cultural globalization intensifies, many countries have been actively promoting their culture on the global stage to strengthen their cultural soft power. Audiovisual works have become one of the most important bridges in cross-cultural communication with their unique multi-sensory allure. For certain countries like America, Hollywood movies have already become an iconic cultural symbol. High-standard subtitling is particularly crucial as Chinese audiences increasingly seek entertaining and high-quality foreign programs. Current research on subtitling has achieved progress in theoretical applications, multidisciplinary convergence, and genre-specific translation. Numerous scholars have adopted various translation strategies into subtitling from theoretical frameworks such as Eco-Translatology, Relevance Theory, and Functional Equivalence Theory. However, the existing strategies for conveying humor in sitcoms remain overly general, resulting in inadequate comedic effects delivery on the screen. Considering research inadequacies and realistic requirements, this article applies the Skopos Theory and focuses on the critical barrier

in subtitling sitcoms—humor delivery using *Black Books* as a case study.

As a classical British absurdist sitcom known for its dry humor, *Black Books* has captivated viewers with rave reviews since its premiere in 2000. However, the current subtitled version of Bilibili still overlooks cultural metaphors and pragmatic logic, which will heavily compromise viewers' understanding of the punchlines. Given that most of the punchlines are rooted in cultural context, it is important to convey the humor into another language considering cultural and linguistic differences. This thesis focuses on cultural uniqueness in cultural-loaded words, polysemy in puns and context-dependent irony. Hopefully, practical translation strategies can be concluded under the instruction of Skopos Theory and contribute to sitcom subtitling practice in the future.

This article will start by reflecting on existing research achievements including subtitling, Skopos Theory, and humor translation, and then investigate the British dry humor and analyze the cases in *Black Books*. Guided by the principles of Skopos Theory, this study prioritizes audience reception, employing a balanced approach of "literal translation" and "free translation" to derive contextually optimal solutions, thereby providing new approaches to audiovisual translation practice.

2. Literature review

2.1 Skopos Theory

The Skopos Theory (*Skopostheorie*) was first proposed by German scholar Hans J. Vermeer in 1978. He advocated that the purpose of translation should serve as the primary guideline for translators' decisions. However, this concept initially failed to gain significant attention due to social factors. It was not until 1984 when Katharina Reiß and Hans J. Vermeer co-authored *Towards a General Theory of Translational Action* that the theory received professional recognition. In the first section of this work, Vermeer elaborated extensively on Skopos Theory, liberating translation studies from the constraints of source-text-centric approaches and redefining translation as a purpose-driven, outcome-oriented activity based on source texts. However, as translation studies in Germany up to that point had been entirely dominated by linguistic theories based on the fundamental notion of equivalence, this paradigm shift attracted harsh criticism, who argued that it compromised the limits of "translation proper" (Koller, 1995, p. 193).

The Skopos Theory gained broader international recognition after Nord translated the work into English (2014), allowing it to transcend the German-speaking world. The theory has been extensively applied to literary translation practices, such as the African Bible Translation (Esala, 2016) and commercial Advertisement Translation (Cui, 2009). In recent years, with the surging viewership of streaming platforms and growing public demand for foreign content, the application of Skopos Theory to subtitle translation has emerged as a prominent research trend in China, evidenced by its implementation in Chinese translations of *Pirates of the Caribbean* (Li, 2014) and *The Matrix* (Zhang, 2013).

Vermeer (1984, p. 90) posited that translation processes guided by Skopos Theory incorporate the sociological principle, prioritizing the target audience's needs and expectations as the defining purpose of translational action. Nord (2001, p. 27-28) further categorized translation purposes into three dimensions: 1) the general purpose aimed at by the translator in the translation process (perhaps to earn a living); 2) the communicative purpose aimed at by the target text in the target situation (perhaps to instruct the reader); and 3) the purpose aimed at by a particular translation strategy or procedure (for example, to translate literally in order to show the structural particularities of the source language). Building on Nord's framework, Yin Xiaofei (2024, p. 130) concluded that Skopos Theory demonstrates strong communicative orientation and social functionality, serving as a vital framework for specific societal groups. Given this inherent communicative nature, Skopos Theory particularly applies to subtitle translation. Translators can employ audience profiling for different film genres to achieve precision in conveying emotional content and cultural messages, thereby enhancing viewers' comprehension of imported films. Notably, subtitles should adapt translation strategies according to diverse target audiences (Mazur, 2023, p. 511). The application of Skopos Theory in subtitle translation has now become a consensus.

2.2 Current Challenges in Subtitle Translation

In 1990, Dirk Delabastita distinguished dubbing translation as an audio-level practice aimed at replacing the source text by removing the

original soundtrack during film adaptation. In contrast, subtitle translation operates as a literal, visual layer superimposed onto the original audiovisual text. Chinese scholar Zheng Xiqing (2020, p. 110) argued that this added textual layer inevitably interacts with the film's visual and auditory elements, creating a tripartite dynamic constrained by both the interplay of these components and the sociocultural context of recipients. Furthermore, culturally specific slang, colloquialisms, catchphrases, and enigmatic folk sayings pose significant challenges to dialogue translation. As linguistic carriers of culture, these condensed expressions encapsulate unique ethnic identities yet resist easy comprehension by foreign audiences. Restricted by temporal and spatial limitations inherent to subtitling, translators cannot freely add annotations. This leads to dual issues: inadequate transmission of cultural nuances and reduced accessibility for target viewers, ultimately resulting in a cultural discount (Zhang, 2021, p. 42).

Wang Juan (2020, p. 90) examines the problem from a cognitive perspective, addressing challenges at both the production end (translators' cognitive processing) and reception end (audiences' cognitive processing). She emphasizes that more than other translation forms, subtitling requires prioritizing audience experience through controlled subtitle length, reduced information redundancy, and linguistically tailored decisions. At a deeper level, translators must align source subtitles with viewers' psychological engagement to ensure coherence with on-screen visuals, thereby enhancing cinematic immersion and audience acceptance of translated content (Yin, 2024, p. 131). In essence, the defining feature of subtitle translation lies in its imperative to prioritize audience receptivity as the paramount translational objective.

2.3 Humor Translation in Overseas Sitcoms

The translation of humor in sitcoms has long been a focal point in their cross-cultural dissemination. During the early stages of globalization, literal translation dominated this practice. For instance, the Chinese-dubbed version of *Everybody Loves Raymond* received a lukewarm reception domestically, sparking criticism about the cultural incompatibility of American humor (Qiu, 2005). Chinese television scholar Miao Di (2004, p. 98) observed: "American TV sitcoms often struggle to gain traction in non-English-speaking countries or even English-speaking regions outside the U.S. as humor rooted in localized cultural contexts frequently loses its appeal through translation."

International scholar Daniela M. (1999, p. 180) analyzed the mechanisms behind sitcom humor, concluding that humor arises from subverting audience expectations and results from interwoven of linguistic, audiovisual, and other elements. Its translatability hinges on translators' mastery of cultural, linguistic, and technical dimensions. Expanding on this, Dong Haiya (2010, p. 78) emphasized that the cultural acclimatization of foreign humor depends not solely on translation quality but is inevitably constrained by multifaceted factors. Sitcom humor derived from creative manipulations of linguistic elements (phonetics, script, lexicon, syntax), popular culture references, sociocultural norms, paralinguistic features (intonation, tone), and canned laughter.

While literature on subtitling and Skopos Theory have proliferated both domestically and abroad, and persistent translation challenges have caught the attention of scholars, proposed solutions for reproducing humorous effects of western sitcoms remain unsatisfying. Also, there exists a paucity of research on the subtitling of the British sitcom *Black Books* in China, leaving imperfect subtitling versions in official domestic platforms. Given the drama's notable frequency of humor, it is an ideal subject for research from the perspective of Skopos and offers valuable insights for translating foreign sitcoms into Chinese.

3. Analysis

Vermeer (1984, pp. 91-92) proposed three-stage methodological phases for translation decision-making in *Towards a General Theory of Translational Action*. The first phase involves assessing the target audience, including their nationality, gender, profession, age, and cultural background, through research into their linguistic and sociocultural context to inform translation strategies. The second phase entails redefining the relationship between the source text and the target text, determining the permissible scope for creative adaptation and the direction of modification. The third phase requires predicting the audience's reception and reactions to the translated text for further adjustments. The first two phases demand the translator's understanding of the audience's

cultural background, while the final phase necessitates additional competencies beyond linguistic proficiency, such as familiarity with the target culture's humor mechanisms in contexts like sitcom translation. This chapter will apply Vermeer's model to analyze specific subtitling cases from *Black Books*. The cases are classified into three categories according to their sources of humor. As the Bilibili version does not provide satisfying humor delivery, this chapter tries to revise the subtitle for better humorous effects, and to summarize strategies for sitcom subtitle translation under the instruction of Vermeer's model.

3.1 Cultural-Loaded Words

Cultural-loaded words are words or phrases imbued with unique meanings and symbolic significance within a specific cultural context. They carry cultural memories, emotions, and values, reflecting the lifestyles, beliefs, and traditions of particular social groups. As humor carried by cultural-loaded words deeply root in its native culture, the successful conversion of cultural elements is crucial in comedy translation. Cultural-loaded terms form a key component of *Black Books*' distinctive dry humor, yet the current subtitles are confusing for audience unfamiliar of British culture:

Example 1 (Season 1, Episode 4)

Fran: I want Manny on this. Manny!

我得让曼尼来听听，曼尼！

Bernard: No, no, no, he's no good to anybody.

不不不，不行，他来了对谁都没好处

Bernard: He stayed up all night with his birthday present.

他一晚上都在摆弄他的生日礼物。

Bernard: The complete set of "*The Sweeney*" and an espresso machine.

一整套除暴安良和一台咖啡机。

This dialogue occurs when Fran seeks Manny at the bookstore but is stopped by Bernard. "*The Sweeney*" refers to a 1970s British crime drama series known for action-packed scenes, explaining Manny's hyperactive behavior later in the episode as he mimics police characters. The original subtitles use a literal translation ("除暴安良"), but Chinese audiences, unfamiliar with this British series, may be confused by Manny's antics in the following plot. The semantic vacancy of the culture-loaded word violates Vermeer's first phase (audience assessment), and the humorous effect is also omitted. A better approach would be adding a brief on-screen note, such as "*The Sweeney* 是英国 70 年代的一部警匪片，讲述两名警察联手破案，追捕劫匪的故事" to ensure viewers grasp the subsequent plot.

Example 2 (Season 2, Episode 2)

Landlord: You're both such lovely girls.

两位可爱的女士们

Landlord: You'll be sharing the sugar in no time.

你们很快就可以分享糖果了

Landlord: Don't fight, and if you do

不要打架 如果非要打的话

Landlord: fight nice with pillows and... jimjams.

用枕头和睡衣打

In this context, the sleazy landlord installs a movable wall in Fran's room to rent space to another girl. "Jimjams" (a British slang for pajamas) alludes to pillow fights at sleepovers, often portrayed as flirtatious in Western media. The landlord's perverse imagination envisions the girls in suggestive attire, but the literal translation ("睡衣") lacks this subtext, and the audience cannot get the humor and may be bothered by the canned laughter in the background. In this case, the literal translation violates Vermeer's third phase (audience reception prediction). An adapted translation, such as using a localized term like "小裙裙" (a playful Chinese term for feminine clothing), would better convey the innuendo.

3.2 Puns

A pun is a rhetorical device that exploits polysemy or homophony to create dual meanings within a statement, allowing both a literal and implied interpretation to coexist. Translating puns poses significant challenges due to linguistic disparities between languages, especially between English and Chinese, which differ in writing systems and phonetic structures. In sitcoms, puns often elicit laughter or admiration for their clever design. In *Black Books*, for instance:

Example 3 (Season 1, Episode 4)

Police: I'll let you take over, offer him a deal.

等下就全权交给你了，跟他做个交易

Manny: What sort of deal?

什么样的交易

Police: I don't know, you call it.

我也不知道 你自己决定吧

Police: But don't give away too much.

但也别太便宜他了

Police: He's looking at two years, minimum.

他至少要坐两年牢

Police: I'll be back in ten.

我要离开

Manny: Huh？！

啊

Police: Ten minutes.

十分钟

Here, Manny misinterprets "ten" as referring to a ten-year prison sentence (linking it to "two years" mentioned earlier), leading to his shocked reaction. The original subtitles merely state the officer's departure, missing the pun's humor. Guided by Vermeer's Skopos Theory, the translation should prioritize recreating the comic effect. For example, rewriting the line as follows.

Police: He's looking at two years, minimum.

他至少得进去两年

Police: I'll be back in ten.

我一会也得进去

Manny: Huh？！

啊

Thus, it could preserve the joke by creating a misunderstanding between "entering" a prison cell and entering the interrogation room, aligning with the audience's expectation of laughter.

Example 4 (Season 1, Episode 5)

Fran: Um, how...how are you?

你 你怎么样

Howell: Oh I'm great, you know.

不错

Howell: Still beavering away on Radio 4.

还在第四电台努力工作

Howell: Yeah.

对

Howell: Hey, you look Fran-tastic.

你看起来很不错啊

The pun "Fran-tastic" (combining Fran's name and "fantastic") relies on phonetic play, but the literal translation ("很不错") loses the humor, which diminished the intelligence of the character. A target-oriented approach would use a Chinese homophonic substitution, such as "你看起来生活很幸'弗'啊" (incorporating "弗" from Fran's name and the word "幸福", which means happiness in Chinese), to retain the wordplay and witty intent.

3.3 Irony

Irony involves using language to convey the opposite of its literal meaning, often expressing criticism or mockery through indirectness. British comedies frequently employ sarcastic irony for dry humor, exemplified by Bernard's acerbic remarks in *Black Books*:

Example 5 (Season 2, Episode 2)

Fran: OK. If I told you that the walls of my flat

嗨 如果我说我房间的墙

Fran: were actually moving in, would you think that I was strange?

真的会动 你们会不会觉得离谱

Bernard: No, I'd ask you to come round and look after my small children.

不会 我会请你来照看孩子

Bernard's sarcastic reply mocks Fran's claim by comparing her absurd situation to the absurdity of him having children to care for. The original subtitles ("照看孩子") flatten the irony, because caring for children seems not as abnormal as movable walls. Following Vermeer's third stage (audience reception), amplification is needed to visualize Bernard's attitude of suspect: translating it as "要是墙会动 那我家孩子就会满地跑了" preserves the character's caustic tone and the scene's dark humor.

4. Conclusion

Through an analysis of the subtitles in *Black Books*, it can be concluded that the most significant barrier for audience from understanding the humor is caused by the current official translation, which adopts literal translation approaches, neglecting cultural metaphors and lack of in-depth research into characters' personalities before translation. This oversight has diminished the series' distinctive deadpan humor — a hallmark of British comedy where characters deliver jokes with straight-faced seriousness. The three core characters generate humor through fixed patterns: Bernard's acerbic sarcasm towards Manny, followed by retaliatory remarks from Manny and Fran against Bernard's venomous

comments. Their linguistic commonality manifests British-style cold humor through culturally loaded references, clever puns, and precise irony.

The translation challenges primarily stem from three aspects: 1) Culturally-specific terms familiar to Western audiences remain obscure to Chinese viewers; 2) Semantic/Phonetic wordplay resists direct conversion between languages; 3) Satirical nuances demand cultural contextualization. Rather than forced localization, preserving the heterogeneous cultural elements of British comedy proves more effective, requiring translators to first thoroughly comprehend UK sitcom conventions.

Under the instruction of Skopos theory, proposed translation strategies include:

1) Contextual re-translation ensuring logical coherence

2) Substitution with Chinese-equivalent puns when applicable

3) Top-screen annotations for culture-specific terms crucial to plot comprehension

4) Judicious incorporation of localized analogies

These approaches aim to maximize retention of original comedic elements, enabling Chinese audiences to appreciate English humor while facilitating cross-cultural dissemination of quality comedy works.

However, this study has limitations. The research focuses on a classic British dry humor series, which may not be universally applicable to other sitcom genres. Nevertheless, it is hoped that this study's theoretical observations can inform future translation practices, ensuring that English-language sitcoms retain their inherent humorous qualities in target languages. This approach would better satisfy audiences' entertainment and leisure needs while preserving the cultural essence of the original works.

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Constructing Parenthood in Non-Biological Same-Sex Households: Negotiation of Care Roles Among Couples in Chile

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Abstract

This paper explores how parenthood is constructed, negotiated, and legitimized in non-biological same-sex households in Chile. Through an intersectional analysis of legal frameworks, household dynamics, and social perceptions, the study examines how caregiving roles are formed beyond biology and within evolving institutional and cultural constraints. It investigates the multiple pathways through which same-sex couples—especially those without biological ties—become parents, including adoption, assisted reproduction, and informal co-parenting arrangements. Attention is paid to how caregiving labor is divided, how "primary" and "secondary" parental identities emerge, and how external institutions such as schools and healthcare systems reinforce or disrupt internal family roles. Despite recent legal advances, such as the 2022 legalization of same-sex marriage and joint adoption, social stigma, legal gaps, and cultural resistance continue to shape parenting experiences. The paper concludes by proposing inclusive policy measures and cultural strategies that recognize diverse family forms, support intentional caregiving, and expand the notion of legitimate parenthood in Chilean society.

Keywords: same-sex parenting, non-biological parenthood, caregiving roles, LGBTQ+ families, Chile, family law, adoption, assisted reproduction, queer kinship, parenthood recognition

1. Introduction

In recent decades, Chile has witnessed a gradual but significant transformation in the understanding of family, moving beyond the traditional nuclear model toward more diverse and inclusive configurations. These shifts are particularly evident in the increasing visibility and legitimacy of same-sex couples forming familial bonds, raising children, and claiming parenthood. However, legal recognition of such family forms has been both contested and uneven, reflecting broader tensions between progressive social movements and enduring conservative norms.

For much of the 20th century, Chilean law upheld a narrow, heteronormative definition of the family, rooted in marital and biological ties. This began to shift with the introduction of the Civil Union Agreement (Acuerdo de Unión Civil, AUC) in 2015, which granted limited legal rights to same-sex couples, including property and inheritance rights. However, the AUC did not

address parenthood, adoption, or full parental recognition, leaving same-sex families in a precarious legal position—particularly for non-biological parents.

A major milestone came in December 2021, when Chile passed legislation to legalize same-sex marriage, becoming the eighth country in Latin America to do so. This law, effective from March 2022, not only affirmed the right to marry regardless of gender but also extended full parental rights to same-sex couples, including joint adoption and legal parenthood recognition for both spouses. The reform was the result of long-standing advocacy by LGBTQ+ organizations and marked a turning point in the state's approach to recognizing diverse family forms.

Despite this progress, implementation challenges remain. In practice, many same-sex couples continue to face bureaucratic delays, institutional bias, and social stigma, particularly when interacting with schools, health providers, or civil registries. Moreover, non-married same-sex parents—especially those raising children from previous relationships or through informal co-parenting arrangements—are still often excluded from formal recognition, limiting their ability to make decisions for their children or access legal protections.

In addition, the Chilean system continues to exhibit a strong biological bias in defining parenthood, which complicates the inclusion of non-biological parents. While legal reforms have made space for equality in marriage and adoption, cultural acceptance of parenthood detached from genetics remains uneven. Public debates and media representations still tend to favor biological or heterosexual parental figures as "natural," reinforcing subtle hierarchies in family legitimacy.

Ultimately, the Chilean case illustrates both the potential and the limitations of legal reform in transforming family recognition. While policy advancements have created new pathways for same-sex families to achieve legal parenthood, the full realization of inclusive parenthood requires deeper cultural change and continuous policy refinement to ensure that all parents—regardless of biology, gender, or marital status—are equally recognized and protected.

2. Meanings of Parenthood Beyond Biology

In non-biological same-sex households, parenthood is not determined by genetic connection but is constructed through relational, emotional, and symbolic practices. This redefinition challenges traditional Chilean family norms, which have historically linked parenthood to heterosexual reproduction and blood ties. Within same-sex families, parenthood becomes a negotiated, lived identity—one built through the consistent enactment of care, responsibility, and presence.

For same-sex couples in Chile, especially where only one parent holds a biological or legal connection to the child, parenthood often begins as an informal and performative role, cultivated through daily routines such as feeding, comforting, schooling, and emotional support. Over time, this caregiving presence becomes central to how children recognize and relate to their parents. Scholars refer to this process as the "doing of parenthood", where legitimacy is earned through action rather than legal or biological entitlement.

The symbolic power of intentionality is particularly significant in these contexts. Many non-biological parents actively choose to take on a parental role, sometimes even prior to the child's birth, in cases involving assisted reproduction or co-parenting arrangements. This contrasts with the normative assumption that parenthood is an automatic status conferred by biology or law. In same-sex households, parenthood is claimed, not presumed—often requiring emotional labor to assert that claim in environments where it may be questioned.

Importantly, children in such families often become key agents in recognizing and legitimizing their parents, regardless of biological ties. Studies from similar Latin American contexts show that children tend to define parenthood in functional and affective terms, identifying those who provide care, support, and love as their "real" parents. In Chile, anecdotal evidence and emerging qualitative research echo these findings, suggesting that for many children of same-sex couples, the distinction between biological and non-biological parents fades in the face of sustained caregiving and emotional bonding.

However, the lack of automatic legal recognition for non-biological parents often creates a gap between lived parenthood and institutional legitimacy. Non-biological parents may find themselves excluded from decisions about

schooling, healthcare, or travel, despite being primary caregivers. This dissonance reinforces the idea that biology continues to dominate the institutional imagination of parenthood—even as social realities evolve.

Ultimately, parenthood in non-biological same-sex households in Chile reflects a deeply relational and care-based model, where legitimacy is rooted in everyday acts of love, responsibility, and reciprocity. By decoupling parenthood from biology, these families expand the cultural and ethical meanings of what it means to be a parent—offering a more inclusive framework that reflects contemporary family diversity.

3. Pathways to Parenthood in Same-Sex Couples

3.1 Adoption, Assisted Reproduction, and Legal Frameworks

Legal and institutional access to parenthood in Chile has traditionally been shaped by heteronormative assumptions. Until the Marriage Equality Law (2021) came into effect in March 2022, same-sex couples had no legal path to joint adoption or shared parental rights. This changed when the new legislation granted equal marriage and adoption rights to all couples, regardless of gender, thereby providing a legal route to joint parenthood that had long been denied to LGBTQ+ families.

However, despite this formal progress, access remains uneven and symbolic more than practical for many same-sex couples. The process of adoption is still heavily discretionary in Chile, requiring psychological evaluations, home studies, and state oversight—steps that can be subject to bias from judges, social workers, or religiously affiliated child welfare agencies. A 2023 report by Fundación Iguales found that same-sex couples experienced a 40% longer average wait time than heterosexual couples when applying to adopt, often facing additional scrutiny about family stability and "gender balance."

In parallel, assisted reproduction—particularly intrauterine insemination (IUI) or IVF—has emerged as a viable option for many lesbian couples. Yet Chile's Law No. 19.779, while allowing assisted reproduction, was designed in a heterosexual framework and does not clearly regulate the legal status of non-biological mothers. This leaves many families in legal limbo: the biological mother is automatically recognized as the legal parent, while her partner must go through separate court processes to obtain parental recognition, often at significant financial and emotional cost.

In the case of gay male couples, surrogacy presents an even more complex terrain. As of now, Chile has no specific legal framework for surrogacy, and the practice exists in a legal grey area. Many couples therefore engage in cross-border surrogacy, particularly in the United States, Canada, or Colombia—countries with clearer legal protections. However, parental recognition across jurisdictions is not guaranteed. Chilean civil registries have sometimes refused to register both fathers on the birth certificate, citing national family law standards, despite foreign court decisions. These legal inconsistencies create further barriers to full inclusion.

In summary, while legislative shifts have opened new paths, systemic inequities, legal ambiguities, and administrative discretion continue to shape who can become a parent—and how quickly or securely.

3.2 Informal Parenting Arrangements and Co-Parenting Models

Before legal recognition was available—or when couples cannot access formal routes—many same-sex couples in Chile have created families through informal and adaptive strategies. One common model involves children from previous heterosexual relationships, especially among lesbian women who had children before coming out or transitioning into same-sex partnerships. In such cases, the non-biological partner often assumes full caregiving responsibilities, becoming a de facto parent through love, time, and labor—but without legal status.

Other families emerge through intentional co-parenting agreements, where two or more adults (e.g., a gay man and a lesbian couple) plan parenthood collaboratively. These networks reflect a "queer kinship" model, wherein biological ties are not primary, and parenthood is negotiated based on mutual trust, shared values, and child-centered intentions. While innovative and often emotionally resilient, these arrangements exist outside the boundaries of Chilean family law, leaving all parties vulnerable in the case of conflict, separation, or death.

These informal configurations may also be invisible to the state, making it difficult for

families to access healthcare, schooling, or social services. Without legal documentation, non-biological parents cannot sign consent forms, claim tax benefits, or seek custody during disputes. In a 2022 qualitative study conducted by Universidad de Chile, participants in informal same-sex families described feeling "legally erased," despite years of active parenting.

Furthermore, institutions often reinforce this invisibility. Schools may fail to recognize two mothers or two fathers, defaulting to "mother and father" on enrollment forms or requiring proof of guardianship that only one parent can provide. Hospitals may restrict visitation rights, especially in emergency cases. These practices place non-recognized parents—and their children—at risk, and reinforce the gap between legal frameworks and lived realities.

3.3 Socioeconomic and Regional Disparities in Access and Recognition

Access to parenthood in Chile is stratified along lines of class, geography, and education, reflecting deeper inequalities in the healthcare and legal systems. While upper-middle-class couples in Santiago or Valparaíso may afford assisted reproduction, private legal services, or even cross-border surrogacy, couples in rural areas or low-income urban communities often face insurmountable financial and logistical barriers.

For instance, assisted reproduction procedures can cost between 1.5 and 4 million Chilean pesos per cycle (approximately USD 1,700–4,500), with success often requiring multiple cycles. Public health coverage does not currently subsidize these procedures for same-sex couples, and legal services for second-parent adoption or recognition processes typically involve private lawyers and long waiting periods.

Additionally, regional disparities mean that LGBTQ+-friendly services are often concentrated in major cities, leaving rural couples without access to supportive clinics, open-minded social workers, or affirming civil servants. In small towns, social stigma may also deter same-sex couples from pursuing formal processes altogether, fearing exposure or discrimination.

The intersection of legal status, income, and location thus creates a layered geography of parenthood—where some same-sex couples can build secure, recognized families, while others remain marginalized and excluded. These disparities highlight the need for state-supported access, anti-discrimination training for professionals, and localized policy reform that ensures parenting is not a privilege reserved for the urban elite.

4. Negotiating Care Roles Within the Household

4.1 Balancing Work, Emotional Labor, and Childrearing Tasks

In the context of non-biological same-sex parenting in Chile, care responsibilities are rarely assigned in a predetermined manner. Instead, they are fluid, negotiated, and constantly evolving, shaped by the intersection of work patterns, legal status, biological ties, and social expectations. While same-sex couples are often assumed to represent egalitarian family models, the division of labor is far from automatic or symmetrical.

Lesbian couples, in particular, often strive for an equitable distribution of tasks, viewing parenting as a shared project. However, daily life logistics and emotional rhythms frequently lead to one partner taking on more caregiving duties. For example, the partner with more flexible work hours may become the one attending parent-teacher meetings, organizing birthday parties, or managing doctor appointments—an accumulation of invisible responsibilities often termed "emotional labor".

This caregiving asymmetry can be intensified by legal inequalities. In cases where only one partner is legally recognized as the parent, the unrecognized parent may face institutional exclusions, such as being denied access to school records or healthcare decisions. As a result, the legally recognized parent often becomes the de facto lead caregiver, not because of preference or personality, but due to legal necessity. This reinforces existing power dynamics and may lead to frustration, resentment, or a sense of marginalization on the part of the non-recognized caregiver.

In gay male households, caregiving dynamics are equally complex. Many couples make use of paid domestic workers, reflecting class privilege but also raising questions about gender, labor outsourcing, and parent–child intimacy. When both parents are employed full-time in demanding careers, household and parenting tasks may be unevenly delegated. While some gay couples take pride in rejecting heteronormative family models, others

reproduce traditional provider–nurturer divisions, especially when surrogacy or adoption involves initial legal asymmetries or differing parental leave entitlements.

4.2 The Emergence of 'Primary' and 'Secondary' Parental Identities

Despite shared intentions and early egalitarian ideals, distinctions often develop between a "primary parent" and a "secondary parent." These roles may not be explicitly named within the household but emerge through patterns of interaction, external recognition, and institutional labeling.

Legal recognition is one of the most powerful factors shaping this division. In many lesbian families, the biological mother is automatically listed on the child's birth certificate, while her partner may not be unless they are legally married or pursue second-parent adoption. This legal asymmetry reinforces the perception that one parent is "real" and the other "auxiliary", even if the emotional and practical parenting work is shared. In practice, this can translate into the biological parent being viewed as the default point of contact by schools, medical professionals, or extended family.

Children's perceptions also play a role in establishing parental hierarchies. While many children of same-sex couples recognize both caregivers as equal parents, especially when raised from birth, children may still internalize messages from peers or institutions about "real" parents. One study from Argentina found that children in same-sex families were frequently asked by classmates, *"which one is your real mom?"*, prompting them to explain and defend their family structure (Viveros Vigoya, 2020). In Chile, similar anecdotal accounts suggest that children may be forced to navigate social pressure and normalize dual parenthood in contexts that are still deeply heteronormative.

These identity asymmetries can affect not only parental authority and responsibility but also self-perception and emotional well-being. The "secondary parent" may struggle with feelings of exclusion, invisibility, or insecurity—particularly in times of conflict, separation, or institutional intervention.

4.3 Power, Equity, and the Reproduction of Gender Norms in Same-Sex Families

While same-sex families are often seen as disrupting traditional gendered expectations, caregiving negotiations sometimes reproduce familiar hierarchies in new forms. Instead of gender, power is expressed through biological status, legal authority, financial contribution, or emotional availability. For instance, the parent with the biological connection may feel a deeper entitlement to decision-making, while the other may defer out of respect, gratitude, or uncertainty.

In many lesbian families, this dynamic reflects how gendered maternal expectations still subtly inform caregiving practices. The biological mother may be presumed to have stronger instincts or a more "natural" connection, especially by outsiders. This creates pressure on the non-biological mother to over-perform caregiving to compensate for her perceived lack of legitimacy—an emotional burden that can create tension within the couple.

In gay male couples, power can be skewed by income disparities or access to legal fatherhood, especially in cases where only one parent is listed on official documents. While some couples work to distribute tasks evenly and create a sense of co-parental parity, others fall into asymmetrical roles shaped by who initiated the parenting process, who paid for surrogacy or adoption, or who has more institutional support.

Despite these challenges, many same-sex couples actively resist these scripts by developing their own rituals of inclusion, renegotiating roles over time, and engaging in reflective conversations about fairness, recognition, and identity. Parenting thus becomes a political as well as personal process, one that involves constant adjustments and reimaginings of care.

5. External Influences on Internal Household Dynamics

While caregiving roles within same-sex households are largely negotiated in private, they are significantly shaped—and at times constrained—by external social institutions. Schools, healthcare systems, civil registries, extended families, and broader cultural narratives exert pressure on how parenthood is defined, performed, and recognized. These external influences do not merely observe family life from the outside; they penetrate the intimate spaces of daily parenting, often reinforcing hierarchies and marginalizations within the household.

One of the most immediate and impactful

institutions is the education system. In Chile, many schools—especially religious or conservative private institutions—continue to operate under heteronormative assumptions. Enrollment forms often presume a "mother" and a "father," school communications are directed to one "primary" parent, and family activities are framed through traditional lenses (e.g., "Father's Day" and "Mother's Day" celebrations). For same-sex couples, these practices can create confusion and exclusion. Children may be forced to explain or defend their family structure, and non-biological or non-legal parents may be sidelined in communication and decision-making. In some cases, educators themselves act as gatekeepers, questioning the legitimacy of a non-biological parent's involvement in school matters.

Healthcare institutions pose similar challenges. Despite advancements in reproductive rights, clinics and hospitals often recognize only the legal guardian or biological parent as the decision-maker, leaving the second parent unable to sign consent forms, access medical records, or participate in key discussions about the child's well-being. This bureaucratic exclusion is not always due to explicit discrimination, but rather to systemic design—a legal framework that still operates on assumptions of biological or marital legitimacy. Such experiences are particularly destabilizing in moments of crisis, where the non-recognized parent may feel both emotionally powerless and legally erased.

Beyond institutional frameworks, extended family members play a crucial role in shaping household dynamics. In Chilean culture, family is often deeply involved in childrearing, and intergenerational networks provide both support and surveillance. Acceptance of a same-sex couple may not always extend to recognition of both parents. Grandparents or siblings may favor the biological parent, refer to the other as "aunt" or "uncle," or undermine their authority in front of the child. These micro-acts of exclusion can have cumulative effects on parental confidence, household decision-making, and the couple's relationship.

Religious and cultural values also impact how same-sex parenthood is viewed in the public sphere. Although Chile has grown more accepting of LGBTQ+ rights in recent years, residual Catholic norms continue to influence societal expectations about what constitutes a "proper" family. Same-sex parents often report the need to "over-perform" parenthood in public spaces—being extra affectionate, present, or prepared—to counter anticipated judgment. This performance pressure adds to the emotional load of parenting and can strain the internal equilibrium of the household.

Moreover, the media's portrayal of LGBTQ+ families in Chile remains limited and often idealized. Positive representation tends to focus on middle-class, urban, cisgender couples in stable relationships—leaving out the messiness, diversity, and socioeconomic struggles that many families face. These narrow narratives feed back into social perceptions, influencing how teachers, doctors, policymakers, and even friends interpret the legitimacy and functionality of a same-sex household.

In this context, internal caregiving dynamics are not merely private arrangements but sites of political negotiation. Who takes the child to the doctor? Who attends the parent-teacher conference? Who speaks on behalf of the family at public events? These questions are influenced by external recognition and social validation, often reinforcing or challenging internal identities of "primary" and "secondary" parents.

Thus, external institutions and cultural scripts do not just regulate legal access to parenthood—they also reshape emotional labor, decision-making authority, and visibility within same-sex families. A full understanding of caregiving dynamics must therefore move beyond the household to account for how these external forces mediate intimacy, legitimacy, and love in LGBTQ+ parenting.

6. Toward Inclusive Parenthood: Policy and Cultural Futures

As Chile continues to reshape its legal and cultural frameworks in response to evolving understandings of family and parenthood, the experiences of same-sex couples—particularly those navigating non-biological parenthood—offer critical insights into how inclusion must be reimagined. Legal reform, while necessary, is only the foundation; true inclusivity requires sustained, structural, and cultural transformation across multiple layers of society.

At the policy level, the full implementation of the 2022 marriage equality law must be reinforced by secondary legislation and

administrative reform. This includes guaranteeing automatic co-parent recognition for same-sex couples in assisted reproduction, streamlining second-parent adoption procedures, and ensuring that public services such as schools and hospitals uniformly respect both parents' rights—regardless of biological or legal status. Moreover, these legal protections must be actively disseminated through training for civil servants, educators, healthcare providers, and judiciary staff, to prevent the gap between policy and practice.

In parallel, data collection and monitoring mechanisms should be established to track how same-sex families interact with the state. Disaggregated data on adoption rates, legal recognitions, service discrimination, and parental satisfaction would not only make LGBTQ+ family life more visible in public policy but also help guide evidence-based improvements. Funding should be allocated to support services for LGBTQ+ families—legal clinics, reproductive counseling, and peer parenting networks—that recognize the distinct challenges non-traditional families face.

However, legal reform alone is insufficient if not accompanied by cultural shifts that decenter the biological, heteronormative ideal of the "natural family." Public campaigns, school curricula, and media representation must work to normalize diverse forms of parenthood. This includes portraying non-biological caregivers as legitimate parents, promoting the concept of "intentional families," and embracing caregiving as a relationship rooted in presence and love, rather than DNA.

Religious institutions and traditional family advocates—often influential in Chile's public discourse—should be engaged in constructive dialogue. Promoting narratives of inclusive parenthood as an ethical commitment to children's welfare, rather than as a threat to traditional values, can help reframe the conversation around shared social responsibilities rather than cultural battles.

Academic research, too, must play a role in documenting, theorizing, and amplifying the lived realities of same-sex families in Latin America. Cross-regional studies, longitudinal tracking, and community-based participatory research can provide the necessary empirical and ethical grounding for long-term social change.

Ultimately, the future of inclusive parenthood in Chile depends not only on legal inclusion, but on a broader rethinking of what it means to care, to belong, and to parent. When caregiving is recognized as a daily practice rather than a biological entitlement, and when all families—regardless of configuration—are granted visibility, protection, and respect, then the ideal of equality becomes not just a legislative possibility, but a cultural reality.

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