38
1º semestre 2020

sociedade e as novas modernidades

INTERAÇÕES

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Prefácio

O volume abre com um artigo de Giuliana Costa sobre programas intergeracionais de homesharing. A partir da proposta dos programas de habitação social, o artigo analisa programas de coabitação que envolvem idosos, jovens estudantes ou trabalhadores. A autora apresenta uma análise detalhada à conceptualização destes programas, procurando refletir sobre como a convivência intergeracional vincula indivíduos de forma a combater a solidão, evitar o isolamento social, e promover cuidados preventivos na população idosa. Numa primeira fase, Costa fez um mapeamento de programas de coabitação intergeracionais promovidos por organizações de dez países. Num segundo momento, desenvolveu um estudo empírico qualitativo recorrendo a entrevistas a gestores destes programas, responsáveis pelas organizações que os promovem e decisores políticos. Os objetivos foram identificar métodos de implementação dos programas de coabitação intergeracionais e aferir as dimensões dos programas de coabitação no campo das políticas dirigidas aos idosos. Os resultados indicam que a partilha de habitação ajuda os idosos a permanecer nas suas casas e permite estabelecer vínculos de assistência. A principal conclusão do estudo é a de que os programas de coabitação são soluções alternativas para idosos, permitindo que a autora denomina como "envelhecimento no local".

Delali Adjoa Dovie propõe uma análise dos planos de reforma com um recorte de género em setores formais e informais da economia numa região urbana do Gana no artigo "Disaggregation of Gendered Differences in Retirement Planning in Urban Ghana". O estudo empírico tem como objetivo compreender as estratégias de homens e mulheres na preparação da sua reforma. A abordagem metodológica é a de métodos mistos com recurso a inquérito por questionário e entrevistas. A partir de uma técnica de amostragem agrupada em vários estágios foi selecionada uma amostra de 442 trabalhadores, com idades entre 18 e 59 anos, para participar no inquérito quantitativo. Posteriormente, foram selecionados 20 destes participantes para entrevistas que foram tratadas com recurso a análise temática e análise narrativa. Considerando os diferentes níveis de responsabilidades sociais, os resultados mostram que existe independência entre homens e mulheres no planeamento da sua reforma. No entanto, os dados mostram que as mulheres são menos propensas que os homens a planejar ativamente a reforma devido aos seus recursos financeiros, frequentemente inferiores aos dos homens. O estudo conclui que as mulheres precisam de preparar melhor a reforma, atendendo a que a sua esperança média de vida é maior do que a dos homens e, ainda, ao facto de a maioria não ter acesso a previdência social, devido ao facto de trabalharem maioritariamente no setor informal.

No artigo "Connected but not Engaged: A Tale of Two Governorship Candidates' Social Media Mobilization in a Gubernatorial Contest in Oyo State, Southwest Nigeria", Adebiyi Ademola Rasheed apresenta um estudo sobre o nível de envolvimento dos eleitores nos média sociais com dois candidatos nas eleições governamentais de 2019 no Estado de Oyo, no sudoeste da Nigéria. Assumindo a teoria da sociedade da informação como enquadramento teórico, os autores abordam a participação e envolvimento cívico online como uma forma de comunicação política. O estudo empírico visou analisar o foco do envolvimento cívico-político, explorar os padrões de mobilização das campanhas através dos assuntos debatidos e dos conteúdos publicados, e avaliar de que forma os seguidores das páginas se envolveram nas questões da campanha. A abordagem metodológica utilizada foi a análise de conteúdo. O corpus de análise foram 3.193 comentários dos seguidores dos dois candidatos nas páginas oficiais das campanhas nas plataformas Facebook, Twitter e LinkedIn. Os resultados mostram que os dois candidatos conseguiram promover o envolvimento dos seus seguidores. No entanto, a campanha de um dos candidatos evidenciou um padrão de comunicação unilateral, ignorando a interação com os seus seguidores. Os autores concluem que as plataformas de média social foram usadas como mais um canal de comunicação unidirecional, ignorando as possibilidades de interação destes meios.

O artigo de Gabriela Gruszynski Sanseverino procura analisar de que forma o jornalismo ficcional transmédia se constrói na narrativa de Harry Potter. Assumindo a premissa de que os produtos culturais são espaços de reflexão sobre o jornalismo, a autora centra-se na saga Harry Potter enquanto narrativa transmedia. Considerando a presença inerente dos jornalistas no universo ficcional de J. K. Rowling, Sanseverino analisou os média num corpus que compreende os sete livros, os oito filmes, a história interativa e a secção Daily Prophet do site Pottermore enquanto elementos de uma mesma narrativa. Recorrendo à análise de conteúdo, a autora identificou representações do jornalismo e do jornalista num produto cultural transmédia que contribui para a construção de imaginários sobre o campo e a profissão. Os resultados indicam que o jornalismo se assume um elemento articulador da narrativa, integrando lógicas de composição e mimetizando parte dos processos da profissão.

No artigo "Estrategias alimentarias de unidades domésticas vulnerables en sectores periurbanos de la Provincia de Buenos Aires (Argentina). Aportes al diseño y la gestión de organizaciones locales y políticas públicas actuales", Lorena Pasarin e Laura Susana Tavares identificam e descrevem estratégias para obter, produzir, distribuir e consumir alimentos desenvolvidos pelos beneficiários dos planos alimentares em Berisso, Argentina, durante o período de 2011-2013. As autoras assumem o vínculo relacional da alimentação, considerando que as estratégias para obter, consumir e distribuir alimentos estão intimamente ligadas ao relacionamento com outras pessoas. O estudo etnográfico desenvolvido suportou-se em entrevistas semiestruturadas, observação e diários de campo. Uma amostra de 18 mulheres, entre os 20 e 48 anos, permitiu obter informação relevantes sobre as unidades domésticas que recebem apoio dos programas alimentares. O estudo identificou e analisou as estratégias de produção própria, obtenção, compra, redistribuição e consumo de alimentos da amostra, concluindo que a situação de vulnerabilidade alimentar permanece. No contexto atual, as unidades domésticas continuam com características e deficiências alimentares decorrentes da falta de monitorização dos programas e das dinâmicas locais.

Deepak Gupta assina o relatório "A C4D Approach to Eradicating Polio. India Succeeds", onde apresenta os resultados de uma estratégia de comunicação para o desenvolvimento da erradicação da poliomielite na Índia. Assumindo a comunicação estratégica em saúde como quadro teórico, o autor desenvolveu um estudo para avaliar a campanha de erradicação da poliomielite em Deli, Índia, para sugerir estratégias de comunicação de saúde apropriadas. Recorrendo a uma triangulação de métodos, Gupta procurou analisar os esforços de comunicação para alcançar a meta de erradicação da poliomielite na Índia, aferir as perceções predominantes das comunidades sobre a aceitação da vacinação contra a poliomielite, e identificar conteúdos, plataformas, modos e frequência de comunicação adequados, com vista a desenvolver uma estrutura estratégica para a comunicação. A investigação concluiu que o conteúdo da comunicação do programa de erradicação da poliomielite estava centrado na promoção exclusiva da vacinação, sem a expor aos fatores de risco que levam à transmissão do vírus. Verificou-se ainda que a comunicação se centra exclusivamente nos canais públicos de rádio e televisão, excluindo as audiências dos média privados. A pobreza, exclusão social, vulnerabilidade e disparidade de género são alguns dos fatores socioeconómicos que podem colocar as comunidades em situação de risco. Neste sentido, o autor conclui que a estratégia de comunicação em saúde deve assentar numa ampla difusão da vacinação e dos fatores de risco nos média, mas também na comunicação interpessoal.

O volume encerra com uma recensão ao livro “Vida e Psicodrama” de Carlos Amaral Dias e Maria Moreira dos Santos, por Esmeralda Macedo.

Inês Amaral
Vasco Almeida
Henrique Vicente

Preface

The volume opens with an article by Giuliana Costa on intergenerational home-sharing programs. Based on the proposal for social housing programs, the article analyses cohabitation programs involving the elderly, young students or workers. The author presents a detailed analysis of the conceptualisation of these programs, seeking to reflect on how intergenerational coexistence links individuals in order to combat loneliness, avoid social isolation and promote preventive care in the elderly population. In the first phase, Costa mapped out intergenerational cohabitation programs promoted by organisations from ten countries. In a second step, she developed a qualitative empirical study using interviews with managers of these programs, responsible for the organisations that promote them and policymakers. The objectives were to identify methods of implementing intergenerational cohabitation programs and assess the dimensions of cohabitation programs in the field of policies aimed at the elderly. The results indicate that housing sharing helps the elderly to stay in their homes and allows them to establish care links. The main conclusion of the study is that cohabitation programs are alternative solutions for the elderly, allowing what the author calls "ageing in place".

Delali Adjoa Dovie proposes an analysis of reform plans with a gender focus on formal and informal sectors of the economy in an urban region of Ghana in the article "Disaggregation of Gendered Differences in Retirement Planning in Urban Ghana". The empirical study aims to understand the strategies of men and women in preparing for their retirement. The methodological approach is that of mixed methods using questionnaires and interviews. Based on a sampling technique grouped in several stages, a sample of 442 workers, aged between 18 and 59 years, was selected to participate in the quantitative survey. Subsequently, 20 of these participants were selected for interviews that were treated using thematic analysis and narrative analysis. By considering the different levels of social responsibility, the results show that men and women are independent in planning their retirement. However, the data show that women are less likely than men to actively plan for retirement due to their financial resources, which are often lower than those of men. The study concludes that women need to better prepare for retirement, given that their average life expectancy is higher than that of men, and also the fact that the majority do not have access to social security, since they work mostly in the informal sector.

In the article "Connected but not Engaged: A Tale of Two Governorship Candidates' Social Media Mobilization in a Gubernatorial Contest in Oyo State, Southwest Nigeria", Adebiyi Ademola Rasheed, Ajetunmobi Umar Olansile and Jelilat Opeyemi Olawale present a study on the level of involvement of voters in social media with two candidates in the 2019 government elections in Oyo State, southwestern Nigeria. Assuming the theory of the information society as a theoretical framework, the authors approach participation and civic involvement online as a form of political communication. The empirical study aimed to analyse the focus of civic-political involvement, explore the mobilisation patterns of the campaigns through the subjects debated and the published content, and evaluate how the followers of the pages got involved in the campaign issues. The methodological approach used was content analysis. The analysis corpus included 3,193 comments from the followers of the two candidates on the official pages of the campaigns on the Facebook, Twitter and LinkedIn platforms. The results show that the two candidates managed to promote the involvement of their followers. However, one candidate's campaign showed a pattern of unilateral communication, ignoring interaction with his followers. The authors conclude that the social media platforms were used as another unidirectional communication channel, ignoring the possibilities of interaction of these media.

Gabriela Gruszynski Sanseverino analyses how fictional-media journalism is built in the narrative of Harry Potter. Assuming the premise that cultural products are spaces for reflection on journalism, the author focuses on the Harry Potter saga as a transmedia narrative. Considering the inherent presence of journalists in the fictional universe of J. K. Rowling, Sanseverino analysed the media in a corpus comprising the seven books, the eight films, the interactive story and the Daily Prophet section of the Pottermore website as elements of the same narrative. Using content analysis, the author identified representations of journalism and the journalist in a transmedia cultural product that contributes to the construction of imagery about the field and the profession. The results indicate that journalism plays an articulating element of the narrative, integrating compositional logic and mimicking part of the profession processes.

In the article "Estrategias alimentarias de unidades domésticas vulnerables en sectores periurbanos de la Provincia de Buenos Aires (Argentina). Aportes al diseño y la gestión de organizaciones locales y políticas públicas actuales", Lorena Pasarin and Laura Susana Tavares identify and describe strategies for obtaining, producing, distributing and consuming food developed by the beneficiaries of the food plans in Berisso, Argentina, from 2011 to 2013. The authors assume the relational link of food, considering that the strategies to obtain, consume and distribute food are closely linked to the relationship with other people. The ethnographic study developed was supported by semi-structured interviews, observation and field diaries. A sample of 18 women, between the ages of 20 and 48, provided relevant information on the domestic units that receive support from food programs. The study identified and analysed the strategies of own production, procurement, purchase, redistribution and consumption of food in the sample, concluding that the situation of food vulnerability remains. In the current context, domestic units continue to have characteristics and food deficiencies resulting from the lack of monitoring of programs and local dynamics.

Deepak Gupta signs the report "A C4D Approach to Eradicating Polio. India Succeeds", which presents the results of a communication strategy for the development of polio eradication in India. Assuming strategic health communication as a theoretical framework, the author developed a study to evaluate the polio eradication campaign in Delhi, India, to suggest appropriate health communication strategies. Using a triangulation of methods, Gupta sought to analyse communication efforts to achieve the goal of polio eradication in India, to gauge the prevailing perceptions of communities about the acceptance of polio vaccination, and to identify content, platforms, modes and frequency of communication, to develop a strategic structure for communication. The investigation concluded that the content of the communication of the polio eradication program was centred on the exclusive promotion of vaccination, without exposing to risk factors that lead to transmission of the virus. It was also found that communication focuses exclusively on public radio and television channels, excluding audiences from private media. Poverty, social exclusion, vulnerability and gender disparity are some of the socio-economic factors that may put communities at risk. In this sense, the author concludes that the health communication strategy must be based on a wide diffusion of vaccination and risk factors in the media, but also on interpersonal communication.

The volume concludes with a critical review of the book "Life and Psychodrama" authored by Carlos Amaral Dias and Maria Moreira dos Santos, by Esmeralda Macedo.

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Intergenerational homesharing programmes. A piece of the 'ageing in place' puzzle?

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Abstract

Homesharing programmes bring two or more individuals who are not linked by family bonds to live under the same roof, sharing domestic spaces and daily living activities. Intergenerational cohabitation programmes match an elderly homeowner (or a person with a rental agreement) who needs companionship and some help with a younger one who is looking for affordable accommodation. This article provides an overview of intergenerational homesharing by tracing their arrangements and salient characteristics, besides explaining the typological variety observed. Based on fieldwork carried out mainly by interviewing homesharing programme managers and policymakers over the period 2015-2019, this paper casts light on several dimensions that characterize homesharing programmes as an arrangement potentially capable of relieving loneliness and social isolation issues in old age, and of generating preventive and light forms of care. The study analyses the main critical aspects of homesharing as well as some of their evolution and transformation dynamics in recent years.

Keywords: Homesharing, homesharing programmes, intergenerational cohabitation, ageing, care.

Programas intergeracionais de partilha de casa. Uma peça do puzzle "envelhecer no local"?

Sumário

Os programas de partilha de casa levam duas ou mais pessoas que não estão ligadas por laços familiares a viver sob o mesmo teto, partilhando espaços domésticos e atividades de vida diária. Os programas intergeracionais de coabitação combinam um proprietário idoso (ou uma pessoa com um contrato de arrendamento) que precisa de companhia e de alguma ajuda com uma pessoa mais jovem que procura alojamento a preços acessíveis. Este artigo fornece uma visão geral da partilha de casa intergeracional, através do rastreio dos seus mecanismos e características relevantes, para além de explicar a variedade tipológica observada. Com base no trabalho de campo realizado principalmente através de entrevistas a gestores de programas de partilha de casa e a decisores políticos durante o período de 2015-2019, este artigo clarifica várias dimensões que caracterizam os programas de partilha de casa como um acordo potencialmente capaz de aliviar a solidão e as questões de isolamento social na velhice e de gerar formas preventivas e leves de cuidados. O estudo analisa os principais aspetos críticos da partilha de casa, bem como algumas das suas dinâmicas de evolução e transformação nos últimos anos.

Palavras-chave: Partilha de casa, programas de partilha de casa, coabitação intergeracional, envelhecimento, cuidados.

1. INTRODUCTION: INTERGENERATIONAL HOMESHARING AND ITS RATIONALE

Living under the same roof with others is a recurrent experience of our life: as children or teenagers we live with parents, then we move in with our partner, and later we, in turn, become parents. "Re-cohabitation" can become an additional resource in some life-cycle moments. This is the case especially in family-based socio-cultural contexts where individual well-being depends more on the capacity families have to socialize risks, rather than on a broader-ranging welfare system (Saraceno & Keck, 2010). Consider an adult returning to the father's/mother's home after suffering a considerable loss of income or following a legal separation, an event that, not being rare anymore, has even been identified with a specific social group, the "*boomerang kids*" (Mitchell, 2006). Or again, we could consider how caregiving situations are faced, when co-presence and hyper-proximity constitute a protective factor for those who are either unable to or find it extremely difficult to care for themselves without assistance. Hence, they go back to living with a son or a daughter or, likewise, an offspring welcomes the parent to his or her own house to make caring easier. However, in several situations, cohabitation can be the answer even for people who are not linked by family ties: due to necessity, when the cost of their own homes is too high, or when they need assistance performing daily living activities as they are not entirely independent anymore; by choice, when, for instance, one decides to take in a boarder for the pleasure of having company or one moves in with others, convinced that cohabitation will improve quality of life; or for mixed reasons (partly based on necessity and partly on choice), which make living together a better way of making the most of both material and immaterial resources possessed.

As a researcher, I have long studied cohabitation among people who do not belong to the same family unit and, specifically, how it is interpreted and implemented by social policies. Hyper-proximity generated by living together with others is experienced by a multitude of social groups and needs (Costa & Bianchi, 2020). It concerns both brief temporary solutions and long-lasting ones involving people who are somewhat vulnerable and have limited options, and even individuals and families who make it an explicit and meaningful choice of their lives. Again, it is central to therapeutic interventions designed to support certain categories of people and needs, or it can be the outcome of social housing programmes, a very specific expression of *homemaking* and of the concept of living.

In fact, many services and initiatives make cohabitation "under the same roof and behind the same door" (Costa, 2016) a basic ingredient of their work, both in the established pathway of public policies, and in the social planning of private non-profit entities, such as associations, cooperatives and foundations. This paper focuses on a very specific subject: organized cohabitation programmes entailing the participation of elderly citizens, young students or workers. Let us explore the actual nature of homesharing programmes - hereinafter referred to as "HS". They can essentially be defined as initiatives that organize an exchange of services, where "a host offers accommodation to a guest in exchange for an agreed level of aid" (Kreickemeier & Martinez, 2001, p.69). As clarified by the "National Shared Housing Resource Center", a US umbrella organization, "HS is a simple idea where two or more people share a home to their mutual benefit" … "A person offers a private bedroom and shared common area in exchange for rent, help around the house, or a combination of the two. Every HS arrangement is unique; it depends on the needs, time, interests, and abilities of the people involved" (2018, p.1). So, HS is not spontaneous cohabitation between friends, students living away from home or people who, for various reasons, share living expenses with one or more co-tenants. It is neither supporting people to rent a dwelling in the market nor organizing co-housing solutions. HS programmes match people based on their needs and characteristics, both as home holders and home sharers, outside a rationale of either mere profit or functional maximization. HS solutions are third-party arranged programmes (Bodkin & Saxena, 2017), also known as "reciprocal housing" (Johnson & McAdam, 2000), underscoring the mutual aid dimension.

HS programmes bring two or more individuals who are not connected by family bonds to live under the same roof, sharing domestic spaces and daily living activities (Ducharme, 2006; Costa, 2016). They provide a specific response to two different — but compatible — needs. Most HS solutions entail intergenerational relationships. They link an elderly homeowner (or tenant) who needs companionship to a younger person who is looking for affordable accommodation and is, at the same time, willing to "give a hand" (Charlebois, 2002). HS also meets other types of needs, with one party receiving help with household chores, and the other becoming a member of the local community, while having the opportunity to either work or study in a peaceful setting. Considering their rationale and nature, these cohabitation programmes are mainly aimed at elderly people (categorised by age, and generally over 65) and university students or single young people, who are able to devote some time and attention to the elderly host. In this sense, HS can be considered a "dense" intergenerational programme[1] because it fosters an enriched form of co-presence in the same space (the dwelling) based on a gentle form of mutual solidarity and support intended to be a "win-win" solution that is enriching for both parties involved. For example, some studies on HS have often observed intense and long-lasting emotional ties generated by cohabitation and by daily living together (Pérez & Subiratz, 2007). Other research papers report that hypothesized outcomes of an HS programme include the fact that it "enables the homeowner to give something back by offering affordable accommodation and in many cases, valuable life experience and new skills to others. The new relationship may also lead to new hobbies and interests as they are more able to get out and about" (Homeshare UK, 2018).

1 Intergenerational programmes can be defined as activities that foster cooperation, interaction, and exchange between two or more generations (Kaplan & Sánchez, 2014; Jarrott, 2010) that can reach different societal benefits, such as breaking down communication barriers and improving empathy between the young and the old (Tabuchi & Miura 2015; Tabuchi, Nakagawa, Miura, & Gondo, 2015), coping with social isolation (Chen & Schulz, 2016), and widening the residential, educational, and career options of individuals across the age continuum (Canedo-García, García-Sánchez, & Pacheco-Sanz, 2017; Marshall, 2015; Newman, Ward, Smith, Wilson, & Mccrea, 1997). There is considerable evidence that these programmes are able to foster the quality of life of all subjects involved (Kuehne, 2003) as well as positive images of ageing (Thompson & Weaver, 2016). There is, however, a need to "to develop a greater amount of *evidence-based programs* (EBP) within the intergenerational field" (Canedo-García et al., 2017, p.2).

2. MY FIELDWORK AND THE "BACKSTAGE" PICTURE

This paper is based on a personal research project carried out over several years. I started researching HS in 2014 and have never stopped since. I studied HS mostly by interviewing key figures, especially managers of various programmes I analyzed. I started researching homesharing programmes because I was fascinated by their core concept when I got to know "Abitare Solidale", a Florentine initiative based on Auser, a retiree organization that was matching people to live together since 2009. At the time, I was looking for innovative long-term care policies addressing the elderly at the local level. Though the programme was not explicitly devoted to elderly people as home holders, most of the hosts were in their old age. This triggered my curiosity. Could that type of programme be an effective solution for elderly people living alone and in need of light support? Could HS be an alternative to traditional in-kind services? Or is it, instead, complementary to them? From that moment onwards I started looking for other programmes, first in Italy and then in Europe, to understand their specificities as well as the welfare contexts in which they were implemented. I focused my research on programmes that match elderly people to young ones, be they students or workers. My first understanding of Italian programmes came from a research conducted with a master's degree student in 2014. We looked for initiatives throughout the country[2], and studied the following programmes, comparing their aims, inclusion criteria, management and outcomes: "Prendi in casa uno studente" (Milan), "Abitare Solidale" (Florence), "Abitare insieme: uno studente, un pensionato" (Como), "Non più da soli" (Turin), Uniexchange (Rome), "Progetto generazioni: passato e futuro convivono nel presente (Verona), "Open *Univercity:* Abitare insieme" (Prato). Most of them were still active.

I realized that very little had been written about these specific arrangements, at least in the academia[3]. As the title of a brief article written by Ward in 2004 says, "HS is a well-kept secret", at least for scholars who study innovation policy issues. Conversely, it is quite well known to private and public policymakers, social workers and

2 Mattia Famà, *Progetti e programmi di coabitazione tra anziani e studenti universitari in Italia (più varianti al tema)*, Politecnico di Milano, 2014.

3 With few exceptions, (see Jaffe & Howe, 1988; Jaffe, 1989; Kreickemeier & Martinez, 2001; Sánchez, García, Díaz, & Duaigües, 2011) in fact, HS is little studied and scarcely discussed in the literature, though some papers have described single schemes or explored the meaning of this form of living within specific programmes (Danigelis & Fengler, 1990; 1991). Most of them are highly descriptive, and give an account of individual experiences, sometimes placing them within broader frames of meaning and action.

social organizations as a result of reports published by single organizations, the visibility given by the media, as well as social innovation prizes and competitions won by HS organizations[4].

I started looking for people who could explain where and how HS was conceived in different countries. I carried out my search on the Internet, and then conducted the interviews mostly by telephone from Milan, the city where I am based. I came across HomeShare International, an umbrella organization that supports a network of professionals worldwide who run homeshare programmes, encouraging learning and good practice, fostering new programmes, understanding the impact of homesharing and raising awareness of "what homeshare can offer as a solution to many of society's needs"[5]. I contacted Elizabeth Mills, at that time the director, who helped me considerably, explaining the "rules of the game" and providing the contact information of some HS programmes. I realized that many initiatives were neither mapped nor cited on the website (e.g., the Italian ones). Hence, I browsed the Web for them, asking those I was interviewing, as I progressed, in a sort of snowball sampling process. Since I am fluent in French, English and Spanish (besides Italian and Portuguese, my mother tongues) in 2015 I was able to talk to and interview the managers of several programmes (as specified in table 1) organized in Italy, France, Belgium, Spain, UK, Australia and Switzerland. Albeit not speaking German, I also interviewed Austrian and German ones. I posed questions about how their programmes were run and implemented, as well as about their origin, model, evolution and criticalities. I wanted to understand if and to what extent they were able to work with and match people under the same roof[6]. The first part of my research aimed to compare HS scheme for-

4 But HS have aroused much curiosity and have been the focus of attention of different media (newspapers, websites, radio and television). Homesharing has also been described in literature: a homeshare arrangement is the basis of Melanie Cheng's novel "*Room for a Stranger*", with the story unfolding in a home shared by 75-year-old Meg and young biomedical student Andy.

5 In https://homeshare.org/. The association is now (since 2019) headed by Shared Lives Plus, a UK-based organization, and the website provides a wealth of information that was not available in 2015. For example, it does not only mention programmes but also networks of programmes around the world, some of which I explored during my research, before coming to know about them through Homeshare International.

6 The genesis of HS programmes turned out to be quite hazy and difficult to trace, as well as the pattern by which their basic idea (meeting at least two different needs through cohabitation) gained what Cox and Béland (2013) call "attractiveness" in recent years. The interviews I carried out reveal that the basic idea "traveled" (Czarniawska & Joerges, 1996) quite a lot, creating hubs of interest in different countries, in most cases without any nexus among them. The first such organized cohabitation programmes were launched in the United States in the early '70s based on an idea conceived by Maggie Kuhn (Kuhn, 1991), activist and founder of the "Gray Panthers" movement. In 1981 she created the NSHRC network (National Shared Housing Re-

mulae, and led to a publication in Italian (Costa, 2016) on a special issue on cohabitation phenomena, projects and policies.

From 2016 onwards I continued to research HS programmes and policies (however, without a systematic plan) to better understand their capacity to cope with the needs of the elderly, and to analyze how they are inserted into the local welfare systems. I attended the Homeshare 2017 conference in Madrid, meeting programme managers and interviewing them. I also did some fieldwork in Perth, Western Australia, where I spent two months (April-June 2018) as a visiting scholar. There, I interviewed various people dealing with HS programmes (consultants, policymakers and umbrella organizations that support organizations which provide services for the elderly). In 2019 I attended the Homeshare conference in Brussels, following which I contacted people I had met there to carry out a second set of interviews with HS programme managers and policymakers (mainly related to the different local welfare arena). I had already interviewed some of them in 2015-2016 — unfortunately not all of them — and now I reached new people I had not spoken to before; the latter included representatives of networks of HS associations[7] (see table 1). All in all, during this extensive research activity I observed the transformations and evolution of some HS programmes, widening my scope, researching into a vast number of schemes and trying to better focus on how different kinds of criticalities are being coped with. In this sense, my aim with the 2019 interviews was to also grasp the main trends of HS organizations and programmes, and to better catch their capacity to meet the care needs of old age, rather than analyze their role in addressing housing for young people and their integration in the local community. Though this paper draws also on findings prior to 2016, when I wanted to analyze HS formulae and implementation, in the second bulk of fieldwork activities, my research question specifically focuses on understanding HS positioning in the field of policies addressing the elderly.

source Center) in the United States to promote forms of HS throughout the country. These programmes appeared in Europe a few years apart from each other, apparently independently of the US schemes, in Granada (Spain) in 1991 with the programme called "Alojamiento por Compañia", and in Darmstadt (Germany) with "Wohnen für Hilfe", both as a response to the housing problem of university students. In 1993 Nan Mailand, considered the "mother" of HS in Europe, launched the first formal programme in London based on the American model. She also founded Homeshare International. With the dawn of the new Millennium, intergenerational HS programmes have been created in many European countries, in Australia, Canada and, recently, also in Japan and in Korea.

7 These networks aim to increase knowledge-based services offered to member associations as advice to start-up or improve programmes, provide training or exchange information about good practices and carry out advocacy actions for members.

Considering the two main research phases, I studied HS programmes and the networks of HS associations (table 1) through 42 face-to-face and telephone interviews with their managers, as well as with policymakers and the heads of agencies promoting HS[8]. Their words will "be heard" many times in this paper. I also draw information from websites, published and unpublished reports and, of course, pertinent literature. It is important to note that I have studied programmes implemented on a municipal, regional or national scale; therefore, they are not always and easily comparable in terms of size and scope. Furthermore, I make no pretense that the study is representative but rather an exemplification and illustration of the diversity and heterogeneity of existing experiences.

Section 3 discusses the basics of intergenerational HS programmes. The following one will focus on their specificity for all that concerns the capacity to prevent the elderly from experiencing isolation and solitude, to encourage forms of light care and to promote ageing in place, thus delaying decisions concerning relocation. Section 5 enlarges on the most critical aspects of the programmes analyzed and the main transformations underway. The final paragraph presents some brief conclusions.

Table 1

Homesharing Programs and Organizations and Homesharing Solutions

Country/City, Programme (P), Network (N), Agency (A)/ years in which interviews took place	HS solutions
Italy	
Abitare Solidale Auser, Florence (P)/ 2016, 2017, 2018, 2019, 2020	Intergenerational No econ. compensation, just share of bills
"Prendi in casa uno studente", Associazione Meglio Milano, Milan (P)/ 2016, 2017, 2018, 2019, 2020	Elderly – university students The student provides companionship and 250-280 €/month
"Vivo.con", Associazione AMA, Trento (P)/ 2016, 2017, 2018, 2019, 2020	Intergenerational Mutual-aid, no econ. compensation, just share of bills
Spain	
"Convive", Solidarios, Madrid (P)/ 2016, 2019	Elderly – university students Mutual-aid, no econ. compensation, just sharing bills,

8 I would like to thank all of them for their time and knowledge.

Country/City, Programme (P), Network (N), Agency (A)/ years in which interviews took place	HS solutions
"Vive y Convive", La Fundació Catalunya/La Pedrera now at Fundació Roure, Barcelona (P)/ 2016	Elderly – university students Mutual-aid, no econ. compensation, just sharing bills
Belgium	
"1toit2ages", Brussels and other cities (P)/ 2016, 2019, 2020	Elderly – university students 2 formulas: a) "formule Classique": the student provides companionship but without any time constrain and pay max. 300 €/month; b) "formule services": the student offers max. 5 hours of help/ week and pay 180 €/month.
CECO Homesharing, Brussels (P)/ 2019	Intergenerational 2 formulas: a) "formule de base"": the student provides companionship but without any time constrain and pay max. 300 €/month; b) "formule économique": the student offers some hours of help/ week and pay 100-250 €/month.
Luxembourg	
"Cohabit-Age", Luxembourg (P)/ 2019	Elderly – university student + other possible matches 3 formulas: a) "formule Solidaire" : the young person assures his/her presence at home 5 nights/week and 2 weekends/month and doesn't pay anything; b) "formule Conviviale : the young person assures a watchful eye, presence at home 3 nights/week and 2 weekends/month and pay part of the bills; c) "formule Amicale" : without time obligation, just passive stay and friendliness and a modest economic compensation.
Germany	
"Wohnen für Hilfe", Frieburg (P) 2016, 2020	Elderly – students + other matches Students provide hours of help depending on the size of the room but other agreements can be in place; possible modest econ. compensation.

Country/City, Programme (P), Network (N), Agency (A)/ years in which interviews took place	HS solutions
Austria	
" Wohnen für Hilfe", Insbruck/ 2016	Elderly – students + other matches Students provide hours of help depending on the size of the room but other agreements can be in place; possible modest econ. compensation.
"Wohnbuddy", Vienna (P)/ 2019	Elderly – young people Economic compensation and helps are agreed case by case
UK	
Homeshare UK (23 associations/programs) (N)/ 2016, 2019	Intergenerational (but also matches the same aged people) In the UK programmes normally the homesharer provides 10 hours of practical support and companionship each week in exchange for free or low-cost accommodation
France	
"Ensemble2Générations", Paris and other cities (P)/ 2019	Elderly – university students 3 formulas: a) "logement gratuit": presence at home from dinner time onwards and the whole night without econ. compensation; b) "logement économique": the student share some moments with the elderly, assure a regular presence at home and pays 150 €/month; c) "logement solidaire": no time obligation, the student assures to have a watchful eye on the elderly and pay an economic compensation (250-500 €/month, depending where the cohabitation takes place)
"Toit + Moi", CNAV, Paris and other European cities (P)/ 2019	Elderly – ERASMUS students – young volunteers Econ. compensation and helps agreed

Country/City, Programme (P), Network (N), Agency (A)/ years in which interviews took place	HS solutions
Le Paris Solidaire, Paris (P)/ 2019	Elderly – young people (18-30 years old) 2 formulas: a) "formule Solidaire": the young person assures his/her presence at home and doesn't pay anything; b) "formule Conviviale : no time obligations for the young, who pays for accommodation and commit her/him self to .
CoSI, "Cohabitation Solidaire Intergénérationelle" (N)/ 2019	28 associations that run HS
LIS, "Logement Intergénérationnel et Solidaire" (N)/ 2019	8 associations that run HS
USA	
Home Share Vermont (P)/ 2016, 2020	Intergenerational 2 formulas: a) Rent only and no routine tasks provided; b) Some tasks provided: Housemates provide an average of 6-8 hours of service a week plus pay a small rent or help with utility bills.
NSHRC- National Shared Housing Resource Center (N)/ 2016	44 organizations that run HS programmes
Australia	
Avivo, Perth (P)/ 2018	Intergenerational A support person lives full-time in a customer's home, providing approximately 10 hours of practical support per week in return for free or reduced rent
HANZA, Homeshare Australia & New Zealand Alliance (5 programs)(N)/ 2018	8 organizations that run 8 HS programmes. In Australian programmes normally the student provide 10 hours of practical support and companionship each week in exchange for free or low-cost accommodation
WAIS, Western Australia's Individualized Services (A)/ 2018	Organization that supports local welfare agencies in developing HS programmes

Source: author's own elaborations.

3. THE BASICS OF INTERGENERATIONAL HOMESHARING PROGRAMMES

This paragraph presents the basics of HS programmes with examples from the experiences I studied in depth to offer the reader an overall view, which explains their heterogeneous features.

Personalized matching and mediation

HS programmes that target elderly people as hosts are based on "counseling models"[9]: staff carefully screen potential candidates (homesharers and homeholders) through personal interviews to understand their needs, inclinations, tastes and willingness to share their life on a daily basis. They then visit the host at home to ensure that the spaces provided are adequate, and at that point organize the match based on their findings, bringing the two parties together and verifying their compatibility and mutual acceptance during face-to-face meetings. Some programmes make use of online platforms for the initial screening of candidates in order to provide personal advice further on. This is the case of "WohnBuddy" in Vienna, "Prendi in casa uno studente" in Milan, and the transnational programme "Toit + Moi"[10]. The use of online matching services is highly controversial in HS programmes because it can distort both the meaning and the core aim of this form of cohabitation service. Moreover, very few are enthusiastic about its use when it involves elderly people[11]. According to the NSHRC (2018) guide, "many individuals believe that an online matching service can be as effective as the comprehensive personalized service of a

9 Other types of cohabitation programmes are, instead, based on "referral models", which means that the agency provides a list of potential matches, leaving the choice to the parties. Although such an organizational model is not part of this paper's scope, I consider it worthy of mention because it can, at times, meet less complex matching needs than those covered by the programmes described so far. The most up-to-date versions of this model use computer platforms on which people enroll, and dedicated algorithms carry out the initial screening process of the programme's potential users.

10 "Toit + moi" is an initiative of the French Social Security. Launched in 2017, it is aimed at providing an answer to the isolation issues of seniors and to the housing demand of young people. This programme promotes and ensures meetings and exchanges between young pensioners who have a spare room and students, apprentices or volunteers enrolled in the Erasmus + programme who have to reside temporarily away from home. I interviewed several people about this programme: They believe that the low take-up rate is due to the use of a digital platform that is not user-friendly for the elderly, who hesitate to even ask for information about the programme itself.

11 According to information that emerged during a special panel on the use of digital platforms at the 2019 Home Share Conference held in Brussels.

HS program" but their experience indicates otherwise because "working with vulnerable populations requires much more hands-on support"… "Home providers need to have great trust in the people and the organization facilitating the match. Constant outreach, recruitment, education, and networking are essential to the success of HS programs" (p. 2). According to my interviewees, this aspect is crucial when involving elderly people, not only for potential digital divide issues, but because they, more than younger people, need to be completely reassured about the possibility to meet people in face-to-face relations since the beginning of the matching process.When cohabitation commences, the programme's staff monitor the process, assisting both parties by mediating and solving any issues that might arise.

Finding the "right people" for a cohabitation project and accompanying them demands excellent professional know-how and relational skills, which some describe as an "art", echoing Pritchard's words (1983), an extremely time-consuming case-based art. Creating couples requires establishing a close relationship with potential cohabitants, knowing their inclinations, values, needs and most intimate aspirations. It is in the realm of what Lee called "sensitive topics" (1993). As my interlocutors repeatedly explained, "every couple is a world of its own". It also requires clearly communicating the underpinning idea so that the potential cohabitants do not have a wrong impression of what to expect.

Agreements

The agreements between participants in terms of rules for the use of domestic spaces, schedule and forms of aid agreed upon are written and then formalized with "housing pacts" or "cohabitation agreements". These arrangements might be flanked by specific housing contracts provided for by current legislation, especially — but not only — if money is exchanged between the guest and the host. Normally no tenure rights are generated for the homesharers. Once the cohabitation starts, most schemes provide for a trial period, usually a month, so that the participants can test each other and see if there are favourable conditions to continue the process. Exit mechanisms are also contemplated with the mediation of the HS programme, should problems arise, which cannot be remedied between the two. These mechanisms are very important because they allow flexible choices, which is not the case in most standard rental markets, where rules are often very strict and, for example, require the homeholder to offer a minimum number of years of accommodation. Conversely, HS programmes are designed to be loosely binding and are managed to minimize incompatibilities and conflicts between participants.

The possibility of implementing "exit strategies" is crucial in this sector because sharing a home is an "experience good" (Nelson, 1970): its quality (in this case, for the elderly to feel comfortable, safe and supported) can be known only once it is used, and not in advance. Indeed, an elderly person can only imagine what cohabitation with a younger person actually is, before experiencing it. Deciding to take the step towards cohabitation and choosing to live with another person who is not a family member is not easy because it is a new experience for many. From the viewpoint of the elderly, it presents many unknown factors both for self and for the family. Hence, it is crucial to know that one can withdraw from a solution he or she does not feel comfortable with.

Homesharing Solutions

Intergenerational HS programmes differ considerably from each other in terms of who manages them, what kind of mediation activities are included, who they address, what sort of relationship they have with public and private actors, if, how and to what extent they are embedded in public policies, the solutions proposed, the object of the planned exchange, and whether any compensation is involved.

As far as the target is concerned, programmes are divided into two broad categories: those aimed at matching people (also families in some cases) of different ages and occupational status, both as guests and as hosts, and those addressed only to university students/young people as guests, with the elderly as hosts (table 1). The latter organize cohabitation agreements that cover the academic period, and which can be renewed for several years.

The type of aid, that is to say, the nature of the exchange between host and guest, varies a lot from scheme to scheme, along with the underlying rationale (table 1). There are agreements in which very affordable hospitality is provided in exchange for help with specific activities. In British programmes the homesharer provides around 10 hours of practical support and companionship each week in exchange for low cost accommodation. Australian programmes envisage 4-10 hours of aid per week. In other programmes, the homesharer is only required to be present in the evening and at night or is generally asked to build a positive relationship and engage in convivial moments.

In terms of economic exchange, there are programmes in which the young person shares only part of the cost of utilities, and others in which the guest also pays a rent or a form of compensation for the use of one or more rooms (table 1). Some programmes are "pure" in the sense that they have just one formula, and that is the case of all "solidaristic" models mentioned before, others provide mixed formulae in which as the hours/tasks or forms of aid increase, the sum to be paid by the young person decreases even to zero. The programme of "Le Paris Solidaire" or the Belgian "1toit2ages", for example, have two different solutions, one called "convivial" in which the student has a room and pays a rent established by the host without committing to carry out any specific activity, and the "solidarity" scheme in which the student must guarantee his/her presence in the evening and participate in utility costs in exchange for a room provided free of charge. Other programmes have more articulated solutions, such as the Luxembourg "Cohabit-Age" and the French "Ensemble2Générations", according to which cohabitation can be underpinned by three different arrangements based on varying degrees of support and economic compensation from the young person.

One of the most interesting *modus operandi* is found in the German and Austrian "Wohnen für Hilfe" programmes. They apply the rule that for every square metre available to the student, he/she is required to provide an hour or two of aid per month and, eventually, a modest sum of money. However, the programme staff mediate highly flexible agreements between the parties, ensuring that the students' life is not "monopolized".

In programmes where the help component is not specifically contemplated but where it is expected to bring together people who are merely well disposed towards cohabitation, the costs for the guest are relatively low, averaging 40% below market levels (versus the cost of sharing with peers), according to the findings of the interviews. In Parisian programmes, the average cost of the room is around 400 euros a month; Milanese ones have a flat fee of 280 euros, and in Vermont the average figure is just over 200 US$ a month with values varying considerably between individual cases.

Programmes that have a pronounced solidarity orientation do not contemplate any form of payment by the guest but only the sharing of utility costs as in the two Spanish initiatives studied, or in those of Trento and Florence. In the "Convive" programme developed in Madrid, for example, the student undertakes to share daily life with the elderly person for at least two hours a day during which, for example, they chat and eat together, and to return home before 10.30 pm, except on one day a week.

Homesharing actors, scales and geographies

Most HS programmes operate with a low number of matchings and are based on a very local scale. We find some exceptions in programmes that work under the same central organization brand around the country, such as "Ensemble2Générations" in France (600 matches in 2019) and "1Toit"Ages" in Belgium (around 450 matches in 2019), or in large areas, as "Abitare Solidale" in Tuscany (320 matches in 2019). In any case, there is a concentration of cohabitations in big cities, characterized by more competitive housing markets, where market rents are higher than in other contexts. For example, "1toit2ages", although present in Louvain-la-Neuve, Liége, Namur, Charleroi, Brussels and in four other small cities, counts 60% of matchings made in Brussels[12].

HS programmes are mostly organized by non-profit associations, whether they carry out other activities (in addition to HS) or not. Since these programmes have a modest level of economic sustainability, these associations often manage other services. German programmes, while bearing the same name throughout the country (a strong point because it is very well known), involve different actors in each city, namely students' offices, third sector organizations (such as Caritas, Red Cross), public agencies or a combination of these. In Munich, for example, the programme is run by an organization for the elderly, while in Cologne it is directed by the university, in partnership with the Municipality. The activities of "Solidarios" in Madrid ("with Convive") and of "Abitare Sociale" in Florence are aimed at mitigating forms of social exclusion and run HS as part of a wider offer. "Meglio Milano" (with "Prendi in casa uno studente") is an association that carries out a multitude of consultancy and research activities for its associates. Avivos' (Perth) programme is, instead, part of a larger repertoire of personal services devoted to elderly and disabled people.

The programmes I studied also include cases of "standing alone" solutions, such as "1Toit2Ages", "Ensemble2Générations", "Le Pari Solidaire", which have been operating since the early 2000s, and focus entirely on cohabitation. It is important to note that programmes may either be provided at a cost or be free of charge. If remunerated, they entail payment of a fee from both hosts and guests for the entire period of cohabitation, with services including the manager's intermediary work, the search for combinations, and monitoring of the cohabitation process. Payment options can vary, based on year or month. Unpaid programmes are implemented by subjects who either carry out other profit-generating activities, which can compensate for the lack of income, or who receive ad hoc public financing.

12 2015 data.

4. HOMESHARING, A LIGHT AND PREVENTIVE WAY OF CARING FOR ELDERLY PEOPLE

Ageing in place

Many different forms of cohabitation between non-family members are in place in our society, and many of them are already part of local social policies, even if they are still quite an eccentric way of living. I shall now discuss HS programmes as defined in the previous paragraphs, with special focus on those involving the elderly as homeholders because most of them are designed to solve the loneliness and social isolation problems of elderly people. It must be stated, at this point, that women are the protagonists of HS. Their numbers are higher than those of men, both as homeholders and as homesharers, and this is true for all the programmes I analyzed. Since seniors who decide to host a young person do so at an elderly age (there are also cases of people doing it at a younger age)[13], very often they are widows who live alone. The longer life expectancy of women exposes them to the solitude of old age more often than men. Based on what my interviewees said, women feel more comfortable sharing their home with another woman than with a young man; hence, this preference leads to the prevalence of young women being chosen for HS agreements[14].

Can the decision to participate as a host in this particular form of "capitalizing" on one's home be considered a way to actively plan[15] the ageing condition and process? Is this a valid "aging in place"[16] strategy? Under which conditions? It is no mere

13 A brief evaluation of ongoing programmes in Spain found, for instance, that 26% of hosts is over 85, and 43% belongs to the age group 75-84 years (Solidarios, 2018). In British programmes 68% of hosts are over 75 (Homeshare UK, 2018).

14 However, some social conditioning mechanisms are also involved in the process, since older ladies are somewhat stigmatized for welcoming a young man into their home, as stated by some interviewees.

15 Traditional approaches to the needs of the elderly population are, to date, characterized by prevalent, if not exclusive, attention to their care and material needs, while active ageing requires the enactment of a process aimed at optimizing opportunities for health, participation and safety in order to improve the quality of life *during* ageing (WHO, 2008).

16 "Ageing in place" implies that older people live independently at home avoiding or postponing care in later life and remain active participants in society. "Ageing in place" guides policies aimed at the elderly since the early 2000s, but was interpreted in many different ways in Europe, giving rise to a re-orientation of welfare services: Nordic and continental countries, characterized by widespread recourse to institutionalization, made an impressive investment in home services and in the supply of new and intermediate housing options. Mediterranean countries, instead, have timidly developed home services, relying on the strong involvement of families and immigrant informal caregivers in enabling the elderly to stay at home (Costa, Melchiorre, & Arlotti, 2020).

chance that most of the HS programmes I studied aim to improve the possibility elderly people have of staying longer at home, reassured and supported by a younger person. Past research suggests that third-party-arranged home sharing helps elderly homeowners remain in their homes into old age (Altus & Mathews, 2000; Danigelis & Fengler, 1990; Bodkin & Saxena 2017).

A good example of this objective is given by the potential outcomes identified by the umbrella organization Homeshare UK for its members: a) less loneliness with the associated outcomes (physical and mental health, extended independence, fewer general practitioners' visits for non-medical reasons); b) support with day-to-day tasks that may reduce the likelihood of falls and, consequently, of admission to hospital; c) remaining in the familiar home environment can be highly beneficial for people with dementia, and relieve pressure on care home bed availability; d) enhanced mental stimuli by interacting with homesharers may also slow down dementia progression; e) homesharers may help to facilitate the wish to die at home (Homeshare UK, 2018). In this sense, HS programmes have a *preventive* approach by aiming to avoid elderly isolation and to preserve their autonomy, thus postponing the need to relocate. This is also stated by the Spanish "Convive" programme, which aspires — among other things — to "solve problems of loneliness in the elderly and of housing for younger people, while building a society that is more inclusive and more aware of the needs,"… to "make it easier for them to open up to the world and to life once again, to recover healthy habits, such as going for a walk, doing cultural activities, enjoying a good conversation,"... to "avoid depression and cognitive decline; to recover self-esteem, the illusion and the desire to have an active life"[17].

According to a recent evaluation of the HomeShare Vermont programme, for example, a quarter of the respondents stated that without the presence of the guest they would no longer be able to stay at home. This is a rather high proportion, considering that, as the other programmes studied, personal services are not expected to be rendered (HomeShare Vermont, 2015). The survey also shows that over 90% of the hosts consider it very important to be able to stay at home.

Agreed support and the important role of the "bienviellance", benevolent presence

What is the "established" aid young people are required to provide by participating in HS programmes? First, they have to ensure their presence at home at night, in

17 As written on the programme website http://www.convive.be (my translation).

case the elder needs something or just to reassure him/her. This is the common factor of all programmes I have studied. It is, generally, a matter of there being a "presence bienveillante", to say it in the very effective French words. The young "keep an eye" on what is going on at home, being able to intervene in light care activities or just to provide some help in case of need. This function of the young people is deemed valuable in the motivations of the elderly involved in HS. For example, 41% of Convive's elderly homeholders say that the greatest reason for choosing to live with a young student is precisely that of not being alone at night (Convive, 2018).

Another type of assistance concerns various daily living activities: preparing a meal, eating together, taking a walk together, taking pets out for a walk, doing the shopping, performing small repairs, teaching how to use digital devices, accompanying the person to the doctor or to other places, helping with house cleaning, waste disposal, reading aloud, sorting out the mail, performing administrative tasks, and so on. Homesharers should be willing to support the elderly in activities that can turn out to be somewhat difficult or scary for the senior. Agreements between cohabitants can be very strict in terms of hours of aid or tasks to be performed, or they might merely include providing help.

Knowing that their loved one is not alone at home relieves the anxiety of the elderly person's family members. Having someone to relate to, somebody who can give an account of what happens at home, also helps the family to better organize support for the elderly relation[18]. Among hundreds of statements made by elderly people involved in HS[19] or by their family members, I find that one, in particular, perfectly portrays this soft way of caring, which is embedded in these programmes:

> (Francoise, 56, testifies for her father, André, 87).
>
> "My father is 87 years old, and has been a widower for the past 3 years. He has always wanted to stay in his house. But, because of repeated falls, we (myself, my brothers and sisters) were increasingly worried to know him alone at the end of the day and at night, even if we live nearby. Having first opted to rent out an

18 Also family members of young people are reassured by the fact that their children live in a favourable context for studying and that they are, in turn, under the watchful eye of the elderly person with whom they live. These positive effects of HS are seldom mentioned. In the "Convive" programme evaluation, it turned out that 75% of students' families feel safer and less worried because their children are homesharing (Convive, 2019).

19 Read on programme websites, reports and media publications.

> apartment attached to the house, at a modest price, we found it did not ensure the caring presence we wanted. We then contacted 'Le temps pour toiT' and analyzed our father's needs together: presence at night during the week, discussion moments, sharing a meal from time to time. Too many commitments to be demanded of a tenant. We, therefore, decided to welcome a person in the contractual framework proposed by 'Le temps pour toiT'. Sophie, a young nurse returning from a humanitarian mission, stayed with my father this summer. She was a wonderful. My father did not feel lonely and knew that someone was coming home at night. He was less anxious and ate better. Sophie stayed until the end of September, when we found another person proposed by the association, who will be staying until next June. Everything comes up for the best after a particularly successful initial experience!"[20].

With regard to family, the literature provides evidence that extensive involvement of the elderly person's family in setting up the arrangement has a strong safeguarding impact, which is consistent with observations reported by Fox (2010). The family's presence and its intervention to support the elderly person is explicitly requested (where geographically possible) to ensure cooperation between the homesharer and family members to ensure "bienvellance", as clearly explained on the website of "Le Pari Solidaire":

> "The friendly presence of a youth does not substitute either existing or needed home support services. The young person doesn't provide care for the elderly. His/her presence at night, in the solidarity formula, is above all reassuring (passive vigil). It can neither be turned into watching over a sick person, nor exempt the family from its obligations (visit, duty of care)"[21].

My data indicate the importance of the elderly person having a family that agrees with and supports this housing arrangement. We must not, however, underestimate the fact that families often "generate noise" (citing an interviewee) when, for instance, they interfere too much in the life of the pair (i.e., the elderly person

20 This testimonial is taken from the LIS website, which gathers materials from its various affiliated intergenerational cohabitation programmes. LIS is one of the two French homesharing networks (http://www.lisfrance.org/temoignages/).

21 My translation of the text that can be found at http://www.leparisolidaire.fr/wp/vous-souhaitez-vivre-avec-un-senior/.

and the student), or have erroneous expectations concerning the young person's duties towards the senior.

Light care

HS programme manifestos clearly state that they do not address elderly people who are losing their autonomy, and that hands-on personal care (going to the toilet, dressing, administering medication) is totally excluded because such activities are the responsibility of the local welfare system and are carried out by professional paid staff. Nevertheless, my interviewees declared that, since most homeholders are in their eighties[22] and are in some way frail, HS is taken up by those who have low care needs. Reporting on the UK HS schemes, Fox argued that, though homeshare is not a regulated service and cannot include provision of personal care, it has been used to meet the needs of people in the early stages of dementia, before personal care becomes an issue (2010). As a matter of fact, there is evidence that HS is used by frail elderly people who are not formally dependent (Homeshare UK, 2018). This also applies to people with incipient dementia, unless they are aggressive or depressed. The report on the 23 programmes relating to HS UK, for example, clearly indicates that 37% of the approximately 450 couples they manage involve people suffering from some form of dementia, a proportion that is growing over the years (ibid.).

In case of growing care needs, most programmes expect cohabitation to continue as long as the elderly person is followed by formal care services and the young person continues to act as an "attentive cohabitant". Moreover, events like spending periods in the hospital are contemplated and, in this case, the fact of living with a young person can be very helpful[23]. It must be said that there are some criticalities in this regard. We must consider that the elderly who decide to homeshare are very often old and, in some way, frail. According to many interviewees, in many instances they resort to this option too late, when they are nearing the time for professional care services. As pointed out by Ducharme (2006), HS is exploited more as a last resort solution than as a choice to build a more active old age. In some contexts, the boundary between the need for support, companionship and conviviality on the one hand, and actual

22 As clarified during interviews.

23 Most of the websites of the various HS programmes publish the testimonials of people who participate in them. Given the promotional purpose of such statements, it is obvious that they are prevalently commendations, and mention no difficulties concerning the decision to cohabit. The 'voices' cited in the publication of Ensemble deux Générations (2019) are more critical but, all the same, many of the stories refer to the reassuring effect of finding somebody known and dear at home upon returning from a stay in hospital.

dependence on the other, is blurred. Providing company and previously agreed support to an elderly person can put unexpected demands on young, untrained live-in companions. Due to the fact that the definition of personal care is fairly broad and people's support needs can develop quite quickly, this is an area which requires a particularly careful approach (Fox, 2010).

Learning

Most programmes also underscore the intergenerational learning dimension. Again, citing the Convive programme, HS aims at creating "an intergenerational meeting space to share a diversity of life experiences. Both learn from each other, support each other and enrich each other," establishing "a link between generations," building "a relationship of trust, of shared learning and of mutual support," and contributing "to breaking down prejudices and stereotypes about the elderly and university students"[24]. Many programme managers say that mutual learning impacts on the intention of the elderly to stay at home by enhancing their skills and desire to plan for the future (with or without the young homesharer). Elderly people who decide to cohabit with a young person very often have their own reasons, such as interacting with somebody who is still part of an active world, enjoying their "freshness" (the term is recurrent in the statements of the elderly), being informed about changes in the world and being involved in them in some way, besides sharing lessons of life with the young person through advice or even by merely telling about personal experiences. Many of the stories collected by the programmes and published on their websites or in publications (also in the media)[25] underscore these dimensions.

24 At http://www.convive.be (my translation). Overcoming stigma against older people and against the programme has to be addressed. Solidarios, the organizing association, decided to create a separate website to better convey this message, since the association has worked for many years with very deprived individuals and families, an activity that is quite different from homesharing.
25 These testimonies can be read on the programme websites and in their publications, for example, those of "Ensemble2Générations" and of "1Toi2Ages".

5. CRITICALITIES AND TRANSFORMATIONS IN INTERGENERATIONAL HS PROGRAMMES

HS intergenerational programmes, as explained in this paper, are quite differentiated in terms of aims, proposed solutions, models and scope. Even if in my opinion they are based on a very good idea, they also present many critical aspects. This section illustrates both these aspects and the transformations that are put forward to overcome them, as revealed by the interviews. Such programmes present three main limitations, precisely unstable funding and inadequate insertion in structured welfare policies, lack of a proper regulation and a great imbalance in the homesharing demand and offer.

Unstable funding and inadequate insertion in structured welfare policies

HS programmes can be part of the public welfare system or not. Public recognition can be given by inserting them into the social services supply chain and/or by funding (at least partially) them. Being included in the local social services opportunities entails that public social workers refer elderly people to the programmes, if they potentially meet the criteria. As reported by Homeshare UK (2018), there is still a lack of formalized referral routes from health and social care professionals to HS providers, and according to my data, this applies to most of the programmes, even if informal routes are in place.

Very few programmes benefit from both types of recognition. That is the case of "Cohabit-Age" in Luxembourg, funded by the "Œuvre Nationale de Secours Grande-Duchesse Charlotte", a national public organization that manages the National Lottery, and of solidarity-oriented programmes, like the Italian "Abitare Sociale" and "Vivo.con", or the Spanish "Convive". The latter are partly financed by Municipalities and by other public actors, even if not continuously but, rather, through annual subsidies and participation in calls for tenders. HS does not fit into the traditional remuneration rationale of social services, and that is why it is hard to structurally embed it into social policies. Other programmes are based on a more mixed revenue structure, benefitting from the financial support of various public and private agencies[26], as well as applying fees to remunerate the programme. HS solutions involving only students as homesharers receive more funds than others, though most of them also receive

26 The UK schemes received for example a big funding by the Lloyd Bank Foundation and the Big Lottery Fund (see Lloyds Bank Foundation, 2018).

public funds through special projects, and benefit from donations and the economic support of private partners.

Most HS programmes are striving to secure and to stabilize their annual budgets, either by highlighting their social impact or by extending their scope to other activities. Considering the former, HS programmes are progressively undergoing evaluation processes[27] to increase their accountability and to make the most of their capacity to reduce costs for the public welfare system (Campbell, 2015). Many programmes are either scaling up (such as, for example, "Abitare Solidale"), or growing in other ways. Exploiting the skills acquired in managing the matching process of potential cohabitants, they are also investing in other forms of shared housing, like promoting the placement of young people in residential facilities for the elderly where, in exchange for a small self-contained apartment with a very low rent or at no cost at all, they devote a defined number of hours a week to the elderly ("Cohabit-Age", "Wohnbuddy", "Ensemble2Générations" and "Le Pari Solidarire" are doing it), or/and managing "inter-generational houses" or "solidary condominiums" where people from different generations live together under the same roof[28]. Finally, it must be said that, as a rule of thumb, a "good idea" attracts sponsors and partners quite frequently, and that most of the programmes I studied have received awards and acknowledgments for their innovative features, especially in the field of policies that improve elderly people life.

Lack of a proper regulation

The second critical aspect concerns the fact that HS programmes are not adequately regulated within welfare policies. In most countries they are not recognized as a specific form of living that meets more than housing needs. One regulatory problem is related to the status of HS organizations that, despite normally being non-profit entities, are "rivals" (Lennarz, 2016) of private ones. In the UK, thanks to their non-profit status and because they do not charge any rent as compensation, HS organizations obtained a legal exception: they are not assimilated anymore to letting agencies and, therefore, are not under the latter's regulations.

Regulatory limits regard other domains, but they are being put forward. In Belgium, for instance, in 2019 a group of organizations dealing with family, social and

27 As pointed out by Sánchez and coll., one of the flaws of HS programmes is that they are poorly evaluated.
28 Considering space limitations, I shall not report all the experiences carried out.

housing policies presented a document addressing major political parties, explicitly asking that cohabitation (even among adult members of the same family) be better regulated from a legal, tax and urban planning point of view, so as not to be penalized as it is today[29]. Gaps in regulation are also related to cohabitation contracts. In most countries, there are no specific contracts suitable for HS arrangements. The country that seems to have innovated the most in this respect is France. The 2018 "Elan" Law introduced the "intergenerational cohabitation contract" in the housing legislation, thus securing the relationship between young people and seniors. Intergenerational solidarity living was already integrated into general legislation, such as the "Code of Social Action and Families" and the "Code of Construction and Housing" but now, with this law, intergenerational cohabitation has been finally strictly defined as having a solidarity basis and as engaging young people under 30 and seniors over 60. The contract eliminates any risk of lease requalification, entails modest financial compensation paid by the young person to the senior, and requires the young person to carry out "small services" or/and to assure a "benevolent presence"[30]. It establishes that these services cannot replace social services provided by professional staff, and cannot be transformed into a work contract, that cohabitants can decide to suspend cohabitation by giving a month's notice, that this type of cohabitation does not prevent both the landlord and the tenant from receiving a housing allowances and, finally, that cohabitation arrangements cannot be opposed by public landlords.

According to this new law, associations promoting intergenerational solidarity-based cohabitation do not risk being prosecuted as unlawful letting agencies. According to my interviewees, the recognition of intergenerational HS as a specific way of living marks an extremely positive turning point for their activity.

The imbalance in demand and offer

Concerning the last point, my research highlighted that there are many more young people looking for intergenerational HS than elderly people who are willing to

29 The title of this document is "Mémorandum pour promouvoir le logement intergénérationnel et solidaire - élections du 26 mai 2019. Vivre ensemble sous le même toit sans perdre ses droits!" ("Memorandum to promote intergenerational housing and solidarity - elections of 26 May 2019. Living together under the same roof without losing rights!"). It is signed by CECO Home Sharing, Coloc' Actions, 1 toit 2 âges, Passages asbl, Association Novatrice Pour Gérer Ensemble Le Logement Et Agir Durablement and AGE Platform Europe.

30 "Benevolent presence" is also mentioned in the reasons for the amendment (No. 750 rect bis in the Senate), which allowed the device to be included in the ELAN law.

share their homes, except in Germany, where the programme is very well known and able to attract "younger" elderly people. Elsewhere, cultural blocks make the elderly consider the home a totally private space. The decision to cohabit with a non-family member in old age is made very slowly because it unfolds in a context of strong resistance to sharing one's own domestic space. As pointed out by NSHRC (2018, p.2), "most people are very reluctant to share their homes; barriers include issues of privacy, safety, and compatibility." US schemes, in a high cost housing district, have witnessed up to seven times as many people looking for housing, compared to the homes available. In European programmes, the mean demand-offer is 3:1, three young people to one senior. What does this imply? HS managers need to better communicate the programme and attempt to attract more potential homeholders with different strategies even if, as with most experience goods, people have to try in order to evaluate it. What emerges from the research, however, is that once experienced, HS is a highly appreciated solution, both by the elderly and by the young. Programme managers must, therefore, be able to persuade the elderly to cohabit.

An ongoing evolution is that many programmes are being rethought in terms of target definition. In the UK, for example, HS programmes are being (since 2019) retargeted as a means by which the elderly help younger people to get a start in life by offering accommodation. They have extended the range of potential hosts to include not only elderly people and, in particular, elderly people living alone, but also elderly couples, people with disabilities, single mothers, etc. though the typical hosts remain homeowners, elderly women aged 70-90 (Fox, 2015). "Meglio Milano" tried to extend cohabitation projects to families and young workers (not only to students). An interesting instrument to enlarge the number of possible elderly hosts has been conceived by "Ensemble2Générations" who is part of the new association "Accordés Mieux a 2 Générations". This association offers HS as a benefit for its' clients: employees can use it to support their elderly parents and/or their children who seek accommodation in whole France thanks to the fact that "Ensemble2Générations" operates in the whole country.

6. BRIEF CONCLUSIONS

This paper provides an overview of homesharing (HS) programmes by describing their custom-designed matching and mediation function, their solutions and agreements, their actors and geographies. I then focused on those having an intergenerational orientation and aiming to relief the problems of loneliness or social isolation experienced by the elderly. As illustrated before, the support and help provided through HS also have a caring component. Young people provide the elderly with a stable and benevolent presence, which reassures the elderly person, allowing him or her to postpone all decisions concerning relocation. My findings confirm other researches ones that indicates that third-party-arranged home sharing helps elderly homeowners remain in their homes into old age (Altus & Mathews, 2000; Danigelis & Fengler, 1990; Bodkin & Saxena, 2017). I also pointed out that, if well managed, HS programmes help the elderly with what I defined as a "light" and preventive form of care. Even if they are not designed to provide care, they do create caring relationships and foster the "ageing in place" process. I can conclude that HS has certain complementary aspects with other forms of intervention and offers an alternative solution only for the elderly who have not suffered a considerable loss of autonomy. "Living with a young person, keeps young" as declared by many homeholders and programme managers but cohabitation is not devoid of conflict, resistance, misunderstandings and, sometimes, discomfort.

This paper attempts to understand to what extent these programmes are romantic rhetoric, just as I identified their critical aspects. Besides the ones described (i.e., unstable funding and inadequate integration into structured welfare policies, lack of a proper regulation and a remarkable imbalance in the homesharing demand and offer), there are others, which I did not discuss here. However, my fieldwork revealed that HS, as I defined it, was and continues to be an idea with a strong positive "valence" (Cox & Béland, 2013)[31]. It has fascinated the imagination of many people and organizations, which have included it into their activities, in some cases establishing new programmes over the past years. Many of my interlocutors (including policymakers) have told about how they "fell in love"[32] (like me and even more so) with this idea, and did their utmost to implement it, developing a response that can, at least potentially, fill the gaps of the existing welfare system. We find such an example in the French programmes and networks. They considered the scorching heat that struck European countries in summer 2003, killing many elderly people, an op-

31 The authors define "valence" as "an emotional quality of an idea that can be either positive or negative in its character, or high or low in its intensity" and suggest that "ideas with a high, positive valence generate a strong attractiveness and therefore are likely to have a greater potential to influence policy change" (Cox & Béland, 2013, p. 308).

32 "Falling in love" is an expression used by many interviewees.

portunity to implement HS[33]. Intergenerational HS aims to create social inclusion and prevent loneliness. But it must be said that implementing the "idea of HS" was difficult everywhere, and that, in any case, it took many years[34] to redefine and positively "contaminate" the orientation of organizations that were already working in the social sector with services aimed at both young people and the elderly. Most of the HS programmes were launched in the early 2000s but are still striving to secure their economic sustainability and better insertion in public policies. Despite being small, HS programmes have the potential to respond to multiple needs with customized solutions and high added value, even if one of the major limitations of HS programmes is their capacity to grow and become economically sustainable. Like other personal services, they suffer from Baumol's disease (Baumol, 2012) and struggle to increase their productivity. HS can only perform painstaking work, involving highly qualified staff, an aspect that is crucial especially when working with elderly people. But I am convinced that such a limitation can also be a strength as it shows how personal services and efforts to ensure social inclusion necessarily entail a keen study of individual differences and traits. It is this insightful analysis that turns the hyper-proximity created by cohabitation into an opportunity for a better lifestyle for those who commit to such an arrangement, as long as the outcome is never taken for granted. Living with others is no easy feat, however enthusiastic one might feel about it.

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33 It is the case of "CoSI" (one of the French networks created to connect associations dealing with community services at the local level) and of "Ensemble2Génerations".

34 Typhaine de Penfentenyo, the founder of the French programme "Ensemble2Génerations", for instance, told me that, according to her, it would "take an entire generation" for intergenerational cohabitation to be understood and deemed a good response to the many needs mentioned above.

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Disaggregation of Gendered Differences in Retirement Planning in Urban Ghana

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Abstract

The paper investigates gendered retirement planning, using quantitative and qualitative datasets obtained from formal and informal sector workers [n=442]. The analyses show that the majority of workers (45.4%) opined that women's retirement preparations are tied to men's, particularly housewives and married ones, reasoning that men are heads of their households. This includes women's desire to be and/or live closer to their partners. Whilst women's preparations may be tied to men's, men often plan for retirement with the support of their spouses. An extent of independence between men and women regarding retirement planning and different levels of societal responsibilities pertains. These are two independent people with different responsibilities, preferences, needs and reasons. However, women are less likely than men to actively plan for retirement. This is inhibited by women's low income flows compared to their male counterparts. Yet, women need to institute more plans than men because women most often do not have social security and live relatively longer. Significantly, what prompts women to plan differs from what motivates men. This provides a reinforcement of the importance of considering gender when seeking to understand the variables that predict retirement planning tendencies, and might contribute to successfully attaining financial security.

Keywords: Gender, retirement aspirations, retirement planning, socialization, longevity, women's retirement plans.

Desagregação das Diferenças de Género no Planeamento da Reforma no Gana Urbano

Sumário

Este artigo investiga as diferenças no planeamento da reforma em função do género entre os trabalhadores do sector formal e informal. Método: Foram utilizados conjuntos de dados quantitativos e qualitativos. A amostra [n=442] foi selecionada utilizando uma técnica de amostragem em várias fases. As análises mostram que a maioria dos trabalhadores (45.4%) considerou que os preparativos para a reforma das mulheres estão ligados aos dos homens, em especial as casadas e as domésticas, por razões relacionadas com o facto de os homens serem chefes de família. Isto inclui desejo das mulheres de estarem e/ou viverem mais próximas dos seus parceiros. Embora os preparativos para a reforma das mulheres possam estar ligados aos dos homens, estes planeiam muitas vezes com o apoio dos seus cônjuges. Existe uma certa independência entre homens e mulheres em matéria de planeamento da reforma e diferentes níveis de responsabilidades societais. Trata-se de duas pessoas independentes com responsabilidades, preferências, necessidades e razões diferentes. Contudo, as mulheres têm menos probabilidades do que os homens de planear ativamente a reforma. Isto é inibido pelos fluxos de baixos rendimentos das mulheres, em comparação com os seus homólogos masculinos. No entanto, as mulheres precisam de instituir mais planos do que os homens porque, na maioria das vezes, as mulheres não têm segurança social e vivem relativamente mais tempo. Significativamente, as razões que levam as mulheres a planear são diferentes daquelas que motivam os homens. Isto reforça a importância de considerar o género, quando se procura compreender as variáveis que predizem as tendências de planeamento da reforma. Tal garantiria, em particular, uma segurança financeira bem sucedida.

Palavras-chave: Género, planeamento da reforma, longevidade, planos de reforma das mulheres.

INTRODUCTION

Ensuring an economically secure and stable post-retirement life requires planning in advance during pre-retirement life and/or to the attainment of the retirement age. Satisfaction in retirement years is clearly associated with pre-retirement planning. However, inadequate or incomplete pre-retirement preparation may culminate in poverty in old age among older people with resources, sufficient for surviving on daily basis, yet, little or nothing for amenities (Phua & McNally, 2008). Retirement preparation is often affected by such factors as socio-economic status, family responsibilities, personal history, cultural and generational orientation towards life (Duflo & Saez, 2003; Phua & McNally, 2008), including insufficient retirement planning information (Dovie, 2017, 2018a, 2018b, 2019a) among men and women.

Retirement planning denotes the diverse preparations and the associated preparation portfolios workers institute during active service or working life phase in anticipation of life after retirement (Agbobli, 2011; Novak, 2006). Critical issues to be taken into consideration in planning for post-retirement life are the weakening of traditional social support systems, increased life expectancy (Zaidi, 2015), and the lack of formal social support infrastructure (Aboderin, 2006; Dovie, 2018a, 2018b, 2019b; Holzmann & Stiglits, 2001).

"Poor financial planning for retirement is reported to be a major problem among formal and informal sector workers and may compound overdependence documented among elderly individuals" (de-Graft Aikins et al., 2016, p.176). Further, not planning towards retirement may engender vulnerability to economic dependence in later life. In essence, "favourable attitudes towards retirement are associated with planning, counselling, personal discussions and exposure to news media presentations about retirement" (Barrow, 1986, p. 169) including social media (Dovie, 2019c). To live a successful or trouble free retirement life is to plan for it now.

Further, Forster and Walker (2013) and Paz and colleagues (2018) have argued that a gendered analysis of active ageing is needed, given the gender gap in life expectancy, health, income and social context. Due to these gender gaps, old-age exclusion could follow a very different pattern for men and women.

Among other things, retirement planning is critical to ensuring financial security at older ages for men and women, yet few studies have explicitly examined what it means to plan for retirement along gender lines. To contribute to research on pre-retirement planning, this study examines gendered retirement planning among men and women in the formal and informal sectors of the Ghanaian economy. Survey and interview data was used to understand the perspectives of these women and men on gendered retirement planning. Specifically, the association between women's and men's retirement plans is explored and how they prepare towards both financially and non-financially sound post-retirement life, including the strategies they used in doing so. These issues remain under-researched and are here given full consideration. It is noteworthy that retirement preparation and retirement planning are used interchangeably in this paper.

Involvement in work

Recent data provided by the Ghana Living Standards Survey, Six (GLSS 6) amply demonstrates that the current structure of the labor force in Ghana is similar to that of the pre-colonial/colonial period. As it was in the past, the majority of Ghanaians are employed in the agricultural sector. Forty-five percent of all the employed persons, who are 15 years and older, are employed in the agriculture sector. Gender differences can also be seen in the sector. Females constituted 48%, while the proportion of males was 41% (Tsikata & Darkwah, 2014). Moreover, in that sector, females are less likely to be self-employed with employees.

However, it is worth noting that notwithstanding the fact that the majority of Ghanaians are employed in the agricultural sector, discussions regarding the agriculture sector are beyond the scope of this paper.

Laborforce by occupation has the following disposition(s): agriculture – 44.7% (note that agriculture encompasses farming, fishing and forestry); industry (manufacturing) - 14.4% and services 40.9% (CIA World Factbook, 2019). After Ghana gained independence in 1957, the government led by Nkrumah launched an industrialization drive that increased the share of manufacturing towards gross domestic product (GDP) from 10% to 14% in 1970. This resulted in the creation of a relatively wide range of industrial enterprises, the largest including the Volta Aluminum Company (VALCO) smelter, saw mills and timber processing plants, cocoa processing plants, breweries, cement manufacturing, oil refining, textiles manufacturing operations and vehicle assembly plants. Most of these survived through protection. The most important manufacturing industries in Ghana entail electronics manufacturing, car manufacturing, electric car manufacturing, automatic manufacturing, cement manufacturing, aluminum smelting, food processing and small and commercial ship building. Whereas industry in Ghana accounts for approximately 25.3% of GDP, the nation's industrial production is rising at 7.8%, which gives it the 38th fastest growing industrial production in the world. Further, after rebating in 2010, Ghana's industrial sector comprises manufacturing, construction, mining and quarrying, electricity and water and sewerage (Addo, 2017).

In Ghana, the Civil Service Law, the Local Government Act, the Local Government Service Act and the National Development Planning (Systems) Act are the main legislations governing administrative decentralization. Administrative decentralization in Ghana involves ministerial restructuring and the establishment of decentralized Departments of the District Assemblies. Several sectors of the national level administration have been decentralized (Tsikpor, n.d.). Services cover government activities; communications, transportation, finance, education, health and other private endeavors that do not produce material goods (CIA World Factbook, 2019).

Baah-Boateng (2007) affirms that high levels of women's participation in the laborforce exist in Ghana. However, this "uniqueness masks important differences in the nature of women and men's participation rates in Ghana both in the formal and informal sectors" (Darkwah, 2014, p. 139). Prior studies articulate the fact that aspects of socio-economic status (SES) such as education, occupational status, and income are positively related to retirement planning (Schellenberg et al., 2005). Those who are more educated tend to work in higher status occupations, earn more, and can therefore make more financial provisions for retirement. Yet the relationship between gender and SES is less clear.

Gender and Retirement

There are more men than women in formally paid jobs, which, to a large extent, are more secured in terms of income, with fewer fluctuations. This is further confounded by the fact that women receive reduced incomes which culminates in lesser savings on their part and in consequence the retirement benefits. The choices individuals make today may result in extended consequences in the nearest future. The direction of the relationship between planning towards retirement and post-retirement life finds expression in the fact that the choices individuals make today may result in extended consequences in the nearest future, especially in post-retirement life.

Planning towards retirement is of tremendous importance across the gender spectrum. In other words, it is pertinent for both men and women. The process of retirement planning comprises several pillars, namely the identification and articulation of retirement aspirations, pre-retirement education (PRE), and a host of others (Dovie, 2019d). However, there are differences in planning towards retirement in terms of the sector of the economy in question, albeit formal or informal. Whereas men are more employed to a large extent in the formal sector, the reverse applies to women who predominate in the informal sector (Osei-Boateng & Ampretwum, 2011), where job security is fragile. Further, women often easily take a break from the workforce for reasons such as child birth, caregiving to ailing spouses, children and/or parents (Barrow, 1986; Quadagno, 2002; Novak, 2006; Moody, 2010). This has implications for the regularity of their incomes, albeit their pension contributions. This may result in women becoming poorer in old age. In addition, women live longer than men.

Retirement experience varies for different classes and gender groups. This is because disadvantages in the labor force are reproduced during retirement since lower levels of post-retirement incomes are received by lower level job training and benefits, including working as a civil servant in Ghana, with a great demand for dependence on public retirement funds together with social security. Women are the most affected because men have much more resources in retirement than women. In addition, post-retirement benefits are linked to income, yet women receive less income and social security (Hatch, 1990).

Mba (2010) purports that in sub-Saharan Africa, including Ghana, fertility values are 6.7 live births per woman in the early 1950s to 5.5 live births per woman by early 2000s and an expected 2.4 live births per woman by the 2045-2050 period. In a similar vein, the expectation of life at birth rose from 36.7 years in the 1950s to 48.4 years by 2000–2005, and is projected to peak at 68.4 years during the 2045–2050 period. Evidence from many countries suggests that women live longer than men. Also, since women marry men much older than themselves, especially in parts of Africa, they are expected to survive their husbands. As a result, more elderly women than men should be expected at older ages. WHO (2020) documents that on average women generally live longer than men by 6 to 8 years.

Retirement Planning and Gender Differences

The disparity in salaries between men and women is well established (e.g., Correll, Benard, & Paik, 2007), as is the impact these disruptions and disparities have on retirement planning for women and the level of economic security they can achieve in their post-employment years (e.g., Angel, Jiménez, & Angel, 2007; Orel, Ford & Brock, 2004). Further, the different social role expectations of women also affects their financial stability. For instance, as mentioned early, women withdraw from the labor force to raise children or care for parents and retire early to be with their spouses at far greater rates than do men (Cunningham, 2007; Quadagno, 2014). Trewin and Curatola (2002) found that to maintain equity in retirement income, women need to not only save for retirement but also do so far more aggressively than men to achieve the same result. Jacobs-Lawson, Hershey, and Neukam (2004) also found gender differences in the amount of time in terms of planning for and thinking about retirement. They found that men spend more time compared to women on these activities. Hershey et al. (2007) also found that the planning behaviors of women significantly differ from those of men.

Cumulatively, research focus on gender differences in retirement planning has changed markedly across the past century as Western society has seen a shift in gender roles with respect to work and retirement. Traditional gender roles placed work and retirement firmly in the men's domain while any research with women considered only their husbands' retirement. Despite women's increasing presence in the workforce since World War II, research into women's retirement, including their preparatory behaviors, did not begin in earnest until 1976 (Slevin & Wingrove, 1995). Research over the following two decades consistently showed that women, in general, did less retirement planning than men (Atchley, 1982; Noone, Alpass, & Stephens, 2010).

Life in general, and post-retirement life in particular, is shaped by resource availability. The amount of income received affects what individuals are able to do, including retirement planning and affordability of health care (Atchley & Barusch, 2004). In an empirical analysis of gender differences in investment behavior, Berggren and Gonzales (2010) said that there is a prevailing notion that men and women behave differently on financial risk taking, as men prefer to take more risks when investing than women.

Men are encouraged to be more outgoing, aggressive and assertive while women are to be more sensitive and emotional. The differences in gender role socialization between men and women can be realized as one key factor of gender variation in risk tolerance. Risk taking can also be linked to the notions of aggressiveness and assertiveness in the context of managerial decision making behavior. Consistent with previous studies, using the 2007 Survey of Consumer Finances (SCF), Fisher (2010) showed that the financial saving behaviors of men and women differ. The empirical analysis of gender saving behavior depicted a relationship between risk tolerance and results of saving.

The measurement of financial retirement planning may be seen as falling into two broad categories: financial preparedness and, less formal, retirement thoughts and planning behaviors. Financial preparedness is typically assessed by pension wealth and/or the ownership of other investments such as property, shares, and personal savings (see Clare, 2004).

It is along this trajectory that this paper sought to explore retirement planning from the viewpoint of retirement aspirations, gender related independent dynamics, interdependent dynamics, as well as attitudinal patterns among formal and informal sector workers in the process of retirement planning.

THEORETICAL PERSPECTIVES

The theoretical underpinnings to this study are taken from Atchley's (2000) retirement theory, Bandura's (1977) social learning theory and Caldwell's (1976, 2005) wealth flow theory.

The stages of retirement theory's pre-retirement phase (Atchley, 2000) stipulates an interplay between the development of detailed retirement aspirations and expectations that yield fairly accurate representations of the future; pre-retirement education and portfolio institution. The theory suggests that retirement planning should be pursued as an ongoing process.

One important factor directing gendered financial behavior are gender differences in socialization. Thus, there is the need to understand whether gender role in socialization contributes in determining gendered financial behaviors, as well as perceived knowledge of women's low risk tolerance and vice versa. Initially, in Bandura's (1977) social learning theory, he pointed out that people learned their own behavior by observing behaviors of the most admired or intimate people in their lives. He named modeling the process of observational learning (see also Renzetti, Curran, Maier, & Shana, 2012). Bandura explained further that modeling allow human beings to learn more quickly and more efficiently.

The socialization process starts from childhood and continues throughout life (McNeal, 1987; Pescaru, 2019). Throughout socialization processes people develop knowledge (including financial knowledge) and skills by contacting, observing, and interacting (Pescaru, 2019; Fox, Bartholomae, & Gutter, 2000). Knowledge, skills and attitudes obtained from the socialization process can be extended to the financial socialization process. In this sense, genders develop their financial behavior depending on their perceived stereotyped social roles and norms. The modern division of labor asks women to be unconditionally responsible for nonpaid house care work and asks men to be industrial or economic activists. Through socialization at young age, men are taught to be outgoing and achievement oriented, whereas women are taught to be emotionally oriented and reserved in their interactions with others (e.g., Fennell, Barchas, Cohen, McMahon & Hildebrand, 1978; Pescaru, 2019). Furthermore, girls are generally socialized to respect men's power, authority and to refrain from expressions of aggressiveness or assertiveness (Greenspan, 1983). Boys, on the other hand, are typically socialized to be assertive and aggressive (Powell, 1988) on the other hand Caldwell (1976, 2005) underscores children's insurance value in times of parents' old age. The insurance role is more important than the investment role.

Socialization is the lifelong process of inheriting and disseminating norms, customs and ideologies, providing an individual with the skills and habits necessary for participating within his or her own society. It is the process by which human infants acquire the skills necessary to perform as functioning members of their society, a process that continues throughout an individual's life (Moniz, 2010; Pescaru, 2019; Purpura, 2013). The socialization process can be divided into primary and secondary socialization. Primary socialization occurs when a child learns the attitudes, values and actions appropriate to individuals as members of a particular culture. This is mainly influenced by the immediate family and friends. Secondary socialization is the process of learning what is the appropriate behavior as a member of a smaller group within the larger society. It is the behavioral patterns reinforced by socializing agents of society such as schools and workplaces (Dovie, 2019c; Moniz, 2010; Pescaru, 2019; Purpura, 2013).

Successful socialization can result in uniformity within a society. If all children receive the same socialization, it is likely that they will share the same beliefs and expectations. Individuals who internalize the norms of society are less likely to break the law or to want radical social changes. In all societies, however, there are individuals who do not conform to culturally defined standards of normalcy because they were "abnormally" socialized, which is to say that they have not internalized the norms of society. These people are usually labeled by their societies as deviant or even mentally ill (O'Neil, 2011).

RESEARCH METHODS

Tema is a typical major Ghanaian city that is privy to and epitomizes an urban setting, in which it is possible to analyze gendered retirement plans among workers. Data for this paper was collected as part of a bigger research project. This project was part of a PhD degree in Sociology, focused on the preparations of Ghanaian formal and informal sector workers towards retirement. The data collection took a cumulative period of 16 months, from October 2015 to January 2017.

Subjects and Settings

An explanatory sequential mixed methods strategy was employed in this study. Using a two-phase approach, the study gathered both quantitative and qualitative datasets. The initial quantitative phase ascertained workers' general views on retirement planning along gender dimensions. A multi-stage clustered sampling technique was used to select a sample of 442 workers aged 18-59 years utilizing the formula by Moore and McCabe (1993). An anticipated non-response was built into the survey design. Further, organizations were first stratified into formal and informal sectors, after which they were then clustered into manufacturing, administrative and service organizations. Out of these, the administrative and service units were randomly selected. From these, individual workers were also randomly selected. Thus, the total population of Tema according to Ghana Statistical Service (2014) is 292,772, out of which 135,640 are employed, and it was from this population that the sample for the study was selected. The second phase sought to understand the lived experiences of workers' retirement preparation. The University of Ghana's Institutional Review Board approved the project. Confidentiality and anonymity were ensured.

Research instruments

Questionnaire

A questionnaire containing two sections was used in data collection. Section one was focused on the socio-demographic characteristics, namely age, educational level, and ethnicity. The second section explored issues of gendered retirement planning that were measured with a 5-point scale, ranging from "strongly agree" to "strongly disagree." Some of the questions were borrowed from Atchley (2000). Similarly, some of the response options were borrowed from Hershley and Mowen (2000) and Novak (2006). The questionnaire was created based on previous research, input from colleagues and also the study's research interests. After the definition of an initial pool of questionnaire items, qualified experts were made to review it, especially for grammatical corrections and accuracy. Before conducting a pilot of the questionnaire on the intended respondents, it was tested on a small sample of 30 individuals following the guidelines of Perneger et al. (2015). Afterward, a pilot test among the intended respondents for initial validation was undertaken. All participants completed the same questionnaire.

Collectively, the selected items were contextualized to fit this study and the Ghanaian scenario. The survey questionnaire instrument's reliability was ensured in diverse ways, namely, facilitation by clear instructions and wording of questions. The questionnaire contained standardized instructions namely "please tick where appropriate." Also, trait sources of error were minimized through interviewing respondents at their convenience. To attain this, interview appointments were scheduled. The survey data's validity was attained following Nardi's (2006) guidelines. The validity of the data was obtained from face-to-face interviews. Also, the survey sought an alternative source for confirmation through further in-depth interviews. The administration of the questionnaire took the form of face-to-face interviews, including self-administration.

Interviews

The sample for the qualitative phase was selected from that used in the quantitative phase. Hence, statistical analysis from the quantitative phase was used to guide case selection from which additional information might be attained. At this phase, respondents who had participated in the quantitative phase also took part in follow up interviews. The participants were purposively selected on the basis of gender and sector of work. In consequence, the data was sorted into formal and informal sectors including gender in SPSS. As a result, 10 formal sector workers comprising 5 men and 5 women were purposively selected, as well as 10 informal sector workers, also evenly distributed by gender (5 males and females).

Data Collection Process

A questionnaire was used in data collection in the first phase. The administration of the questionnaire took the form of face-to-face interviews to prevent unreturned questionnaires. The study set out to investigate the hypothesis that there is an association between gender and retirement planning.

During the second phase, 20 participants who had participated in the initial phase also took part in follow up interviews with the purpose of obtaining an explanation for issues raised in the prior phase. In-depth interviews were used in the gathering of data. Prior to data collection, permission to tape record discussions and informed consent were obtained.

The interview guide and questionnaire were piloted to ensure accuracy in understanding, fluency and proper wording of questions. The face-to-face interviews were conducted in both English and Ghanaian languages, namely Ga, Ewe and Twi.

The interviews lasted approximately 45 minutes. Initially, the researcher reminded participants about the aims of the study and that the discussion would be used to suggest future directions. Each in-depth interview took the form of a semi-structured interview and was conducted individually in the participant's office or place of choice. The interviews were audio-taped.

Data Analysis

The quantitative data gathered were analyzed utilizing the Statistical Package for Social Sciences Software (SPSS) version 20.0, using frequencies, percentages and bivariate analysis - Pearson product moment coefficient tests were used in the study as the standard to assess the correlation between the degree of relatedness between gender and retirement planning. The usage of a multi-stage sampling approach means that the results are statistically representative, thus, generalizability is permissible to the general population.

The in-depth interviews were preliminarily analyzed as they were being collected based on which modifications were made in the sampling strategy before the next series of interviews to ensure gaps were ascertained and rectified. This act preserved the multivocality and complexity of lived experiences while maintaining focus on the study's theme. The qualitative data analysis process was undertaken following Bryman's (2008) analysis strategies. A combination of the following analytic strategies was employed in this study. First, analytic induction, which was related to reaching general explanations, was used. Second, thematic analysis was undertaken in relation to the examination of theoretical themes of the research through studying particular cases. Finally, narrative analysis was used to search for new issues from the stories told by the research participants about their lives.

The analysis process was aided by the application of the framework method in which matrix-based comparisons were undertaken. This offered a detailed analysis of the data within a particular theme and provided a clearer and deeper understanding of key themes within the context of the study. Efficiency of the thematic analysis conducted was ensured following a variety of principles in the course of data processing. These include repetition in search of issues that are commonly repeated by interviewees, non-repetition in search of issues that were rarely mentioned by the interviewees; similarity and difference in a search of similar and different responses among interviewees on given themes such as tying (especially married) women's retirement plans to those of men; transitions in search for issues that link themes and sub-themes together. Theory linkage was also pursued, searching for connections to scientific concepts or theory for the outcome of research findings, such as the articulation of retirement aspirations as a fundamental goal in lieu of retirement planning. These were undertaken to ensure the pursuance of the relationship between categories and themes of data seeking to increase the understanding of the phenomenon.

Nvivo Software was used to facilitate text coding and retrieving coded texts, as well as interpret the data. The analytical process proposed by Bazeley and Jackson (2014) was followed, using five distinct steps. A project was created which comprised all the documents, coding data and related information that assisted in the process of data analysis as well as saving the NVivo project. The transcribed interview files were named respectively. Qualitative data files which entailed the preparation of documents for import, following which the requisite documents that were intended to be analyzed were then imported. Additionally, nodes were engaged as a place in NVivo for references to code text.

A chunk of data were then coded. This included finding obvious themes as well as auto-coding. Subsequently, multiple codes were assigned to the same chunk of the texts including going through the same process. The codes formed a pattern. The passages of texts were compared and contrasted for ways in which they were similar and different. The emergent concepts entailed for example, perceived gender differences in retirement planning. The final step pertained to deepen the analysis and encompassed the following: the start of the analysis, going further with concepts, categories and themes including narratives and discourses. Memos were used to tell the story of the research by adding descriptions. The knowledge developed from the data was reported.

The outcomes of these activities were recorded in discussion memos. These strategies were integrated into the process of learning from the data. A thematic multi-case analysis was employed, the comparative focus of which was on individual cases including the preservation of their uniqueness. Miles and Huberman (1994) have succinctly expressed the goals of this type of analysis including generalizability.

Further counts of a theme within the unstructured text were used as a proxy indicator of the significance of that theme for qualitative analysis. The themes appeared as major findings and were used to create headings in the results section of the article. The interrelation between themes involved the use of narrative passages to convey the findings of the analysis. The themes were interconnected into a storyline. From these explorations, the researcher sought to understand how people construct meanings and actions, as preparations for understanding why people act the way they do (Charmaz, 2006). The final step entailed the selection, filtering and viewing of the predefined report for the study.

RESULTS

The study sample consisted of 213 males (48.2%) and 229 females (51.8%) aged between 18-59 years. Most of the respondents had some level of education. Overall, the highest educational level attained by a near majority of the respondents (46.4%) was tertiary education. Thus, the sample is composed of a high proportion of university graduates. The sample also presented an even distribution between the formal (n = 221, 50%) and informal (n = 221, 50%) sectors. The marital status of the study sample comprised married, co-habiting, separated, divorced, widowed as well as single participants. The majority of respondents from the formal sector were married (aproximately 72%). More informal sector workers (28.5%) were single whereas none were co-habiting or separated in the formal sector (Table 1).

Table 1
Respondent Demographics

Variables	Characteristics	Formal sector Percentage (%)	Informal sector Percentage (%)
Age	18-29	13.6	16.7
	30-39	29.9	33.9
	40-49	34.4	21.7
	50-59	22.2	27.6
Sex	Male	51.6	48.3
	Female	48.5	51.4
Education	No-formal education	0.0	5.4
	Pre-tertiary education	17.5	82.5
	Tertiary education	89.3	10.7
Marital status	Married	71.9	52.0
	Co-habiting	0.0	4.9
	Separated	0.0	2.3
	Divorced	1.8	5.9
Occupation	Widowed	2.7	6.3
	Single	23.5	28.5
	Office work	30.5	-
	Teaching	19.5	-
	Trading	-	24.5
	Driving	-	12.4
	Artisanry	-	12.7

Source: Field data, 2016

The study participants differed in professional experiences and in personal characteristics, but all were identified as individuals who expressed divergent views on the theme of the study.

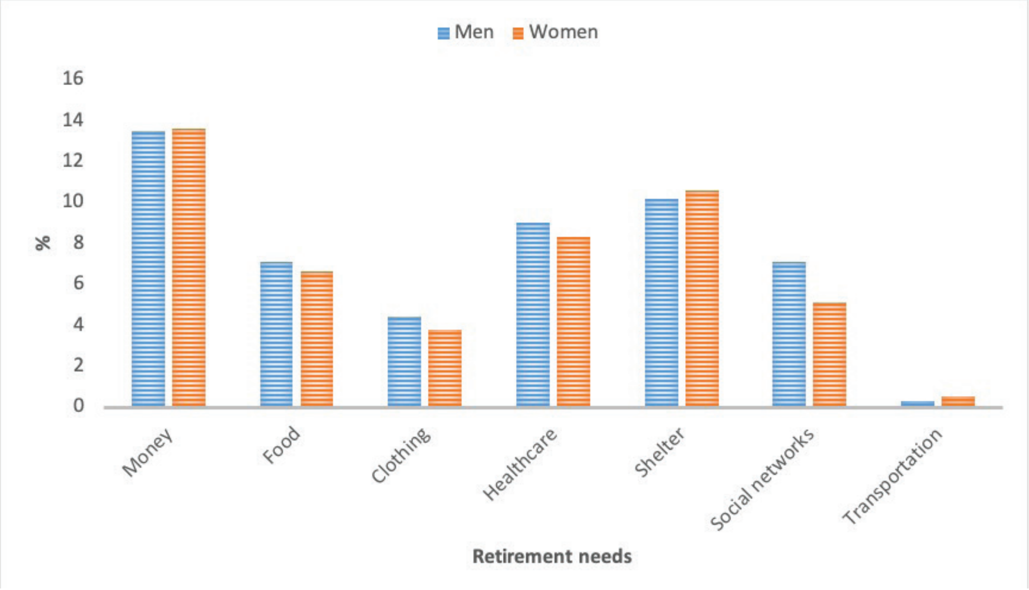
The occupational categorization of the study respondents encompassed office work (30.5%), teaching (19.5%), trading (24.5%), driving (12.4%) and artisans (12.7%). Against this backdrop, office work and teaching categories constitute the predominant formal sector work whilst trading, driving and artisans denote informal sector work (Table 1).

Workers' Retirement Aspirations and Plans

Retirement aspiration and/or expectations encompass things needed to plan for in aid of financial security (13.5%) intimated by women vis-à-vis social networking (Figure 1). It is worth noting that these aspirations and/or expectations confirm Atchley's theoretical statement that retirement goals precede retirement planning as an idle prerequisite.

Figure 1

The Most Important Things to Consider when Planning for Retirement: Gender Differences in Retirement Needs



Source: Field data, 2016.

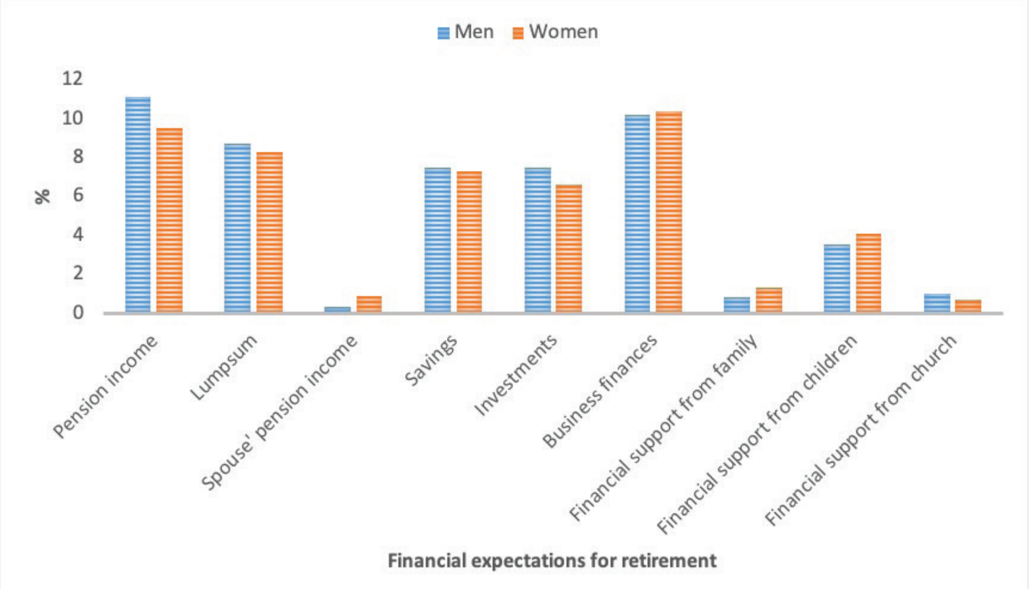
Expected Sources of Finance for Utilization during Retirement

The need for financial security in old age cannot be overemphasized. Thus, the results show that more women workers look forward to dependence on spouse's pension income (11.1%) whereas women in general (0.7%) largely hope to rely on support from the church (Figure 2). From the statistics, children as a source of retirement finance appears to be more emphasized for women than men with significance for social insurance dynamism, in terms of which this finding corroborates Caldwell's theoretical stipulation inasmuch as it states that workers plan for child care with social insurance in old age as the anticipated outcome. The women's views from the interview data emphasize the existence of different motives and desires towards retirement and the related planning. Thus, a man from the formal sector asserted that "*there are different individuals with their mind sets, different aspirations and expectations*".

All the constituents on Figure 2 may collectively yield financial security for the individual workers when instituted. Also worthy of note is that workers aspired to have both financial and non-financial (or social resources) on which to depend during retirement.

Figure 2

Expected Sources of Financial Income for Retirement



Source: Field data, 2016.

The respondents, however, expected that such savings, when accumulated, should be able to cater for their needs for a period of five years after retirement until death. The notion of 'till death' may span from immediately after retiring from active work or several years thereafter, albeit shrouded in perceptions of longevity. Noteworthy is that these retirement aspirations and/or expectations influenced the institution of workers' plan portfolios. In addition, these findings corroborate the theoretical views of Atchley (2000).

Table 2
Retirement plans instituted

Measures	Men (%)	Women (%)
Retirement savings	28.6	71.4
Life insurance	47.6	52.4
Fixed deposits	66.7	33.3
Susu	0	100.0
Pension contribution	54.2	45.8
Monitor investments	48.1	51.9
Family planning	40	60
Join association(s)	47.4	52.6
Investment in children's education	33.3	67.3
House acquisition	47.5	52.5
Land acquisition	43.8	56.2
Provident fund	66.7	33.3
Mutual fund	94.5	5.5
Health plan	70.0	30.0
Dieting & fitness program	57.8	42.2
Periodic health checks	42.9	57.1
T-bills	42.9	57.7
Figure out retirement aspirations	51.8	48.2
Explore partial retirement options	50.0	50.0
Develop interests, friendships, & skills outside work	51.2	48.8
Shares	66.7	33.3
Stocks	61.2	38.8
Epack	0.0	100.0
Mfund	0.0	100.0
Funeral policy	0.0	100.0
Diversification of income sources	40.6	59.4
Expand business	0.0	100.0
Diversification of portfolios	42.9	54.1
Social relationship building	47.1	52.9
Credit union membership	28.6	71.4

Source: Field data, 2016.

More female workers predominated in instituting susu, savings, pension contributions including the monitoring of retirement investments, land acquisition, periodic health checks (Table 2). The formal sector also dominated in family planning (60%), provident fund, T-bills, shares, stocks, relationship formation among others.

Both genders however undertook the joining of associations. This may be an indication of seriousness at planning and an awakening to the realization of an impending transition. The retirement plans instituted by the study sample show that more men (61.2%) invested in stocks and women (51.4%) undertook portfolio diversification.

These measures can further be categorized into planning strategies (e.g. monitoring of investments, family planning, diversification of income sources, diversification of portfolios); savings and/or investments (e.g. retirement savings, life insurance, fixed deposits, susu, pension contribution, investment in children's education, house acquisition, land acquisition, provident fund, mutual fund, T-bills, will, shares, stocks, Epack, Mfund, funeral policy); healthcare (e.g. health plan, dieting, health checks); and social relationships (e.g. join association, investment in the education of children and/or wards). The data from interviews indicates that participants who articulated the expected sources of finance for retirement utilization, four of them documented the following:

> *Putting all your retirement investments in one basket is suicidal. Do you remember the pyram scam? Hmmm, so the ideal way is to spread them. Hence, my resort to plan diversification* (Formal sector man).

> *As for me, I have not collected the accrued money for five years now…because I want it to remain there as my pension money* (Formal sector woman).

> *I have enrolled in the premier health insurance plan for purposes of my old age* (Informal sector woman).

> *The association ensures access to information related to insurance, savings, sika plan and many more…. It also makes contributions to support members in times of ill-health, outdooring, bereavement as well* (Informal sector woman).

Further, the survey data was subjected to Pearson Chi-square statistics and Cramer's V test to assess the association between gender and retirement planning (Table 3). The Cramer's V=0.706 indicates a strong association between the two variables.

Table 3

Chi-Square Statistics for Gender and Retirement Planning

Tests	Value	Degree of freedom	Asymp. Sig. (2-sided)
Pearson Chi-Square	499.222a	10	.000
Cramer's V	0.706	10	.000
N of Valid Cases	442		

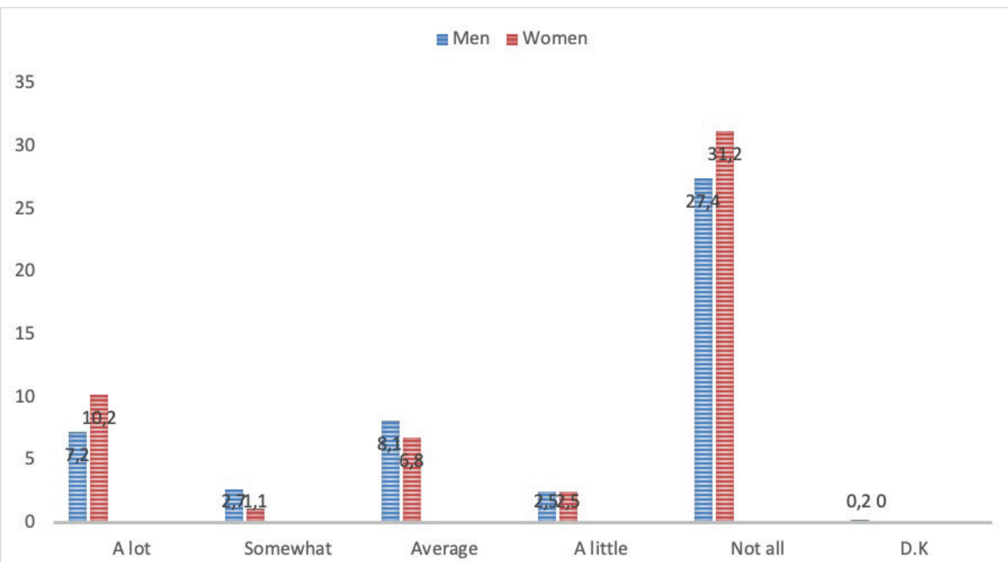
Source: Field data, 2016.

Gender Differences in Retirement Planning

Figure 3 shows the participants' perception of gender differences in retirement planning. In our sample, 10.2% of women participants perceive "a lot" of differences between sexes (10.2%), whereas only 7.2% of the men identify differences of this magnitude. However, a large number of women also tend to affirm that no differences exist at all in retirement planning (31.2%), but this percentage is somewhat lower in men (27.4%). In both sexes, the perception that no gender differences exist predominates.

Figure 3

Depiction of Gender Differences in Planning for Retirement



Source: Field data, 2017.

Interviews allowed for a better understanding of the gender differences that some respondents identify. For example, *"it depends on what one is interested in, but women manage funds better than men do except for their impulsive buying"* (Informal sector man). This perspective from a male participant highlights the attribution of two qualities to women: better management funding associated with impulsive purchasing. Another male participant, considered that retirement planning is not a major concern for women, because they can rely/depend on their husbands: *"on the average women don't have challenges looking up to the future because the better half is there"* (Formal sector man). Another male respondent considered that this perceived laissez-faire regarding retirement planning on the part of women derives from their focus on domestic chores: *"they do so in view of the fact that they take care of the home"* (Formal sector man). Quite apart from the fact that women have been depicted as better fund managers, "*somehow, some women have more money than men and vice versa*" (Informal sector man).

The voices may suggest that retirement planning is much easier for married or cohabiting women than their unmarried/non-cohabiting counterparts, although there could be exceptions to this notion. Further still, no matter the level of support received during the process of retirement planning, including the availability of funds, all planners (women included) are impacted by impediments of one form or the other such as capital market volatility, inflation and a host of others. It suggests that when it comes to retirement planning, married women particularly exert less financial efforts and resources with more emanating from their spouses notwithstanding the fact that women may be better fund managers. Yet, some women do not depend financially on their spouses in lieu of retirement planning. Theoretically, this finding is consistent with Bandura's (1977) intimation in terms of social learning acquired through the process of socialization in relation to perceiving men as family heads and more aggressive. This also has implications for the notion that women's retirement plans are tied to those of men.

Do women prepare better than men?

The notion that women prepare better than men was not left out and was documented by three participants. For instance, an informal sector male worker stated that "*women prepare more adequately than men do because they suffer most when the going gets tough, especially those women who work*". This includes the fact that "*women prepare more in investing in their families whilst men concentrate on properties such as houses, etc*" (Formal sector man). This is reminiscent of perhaps low income levels and the consequent investment of financially less intensive retirement assets as articulated below.

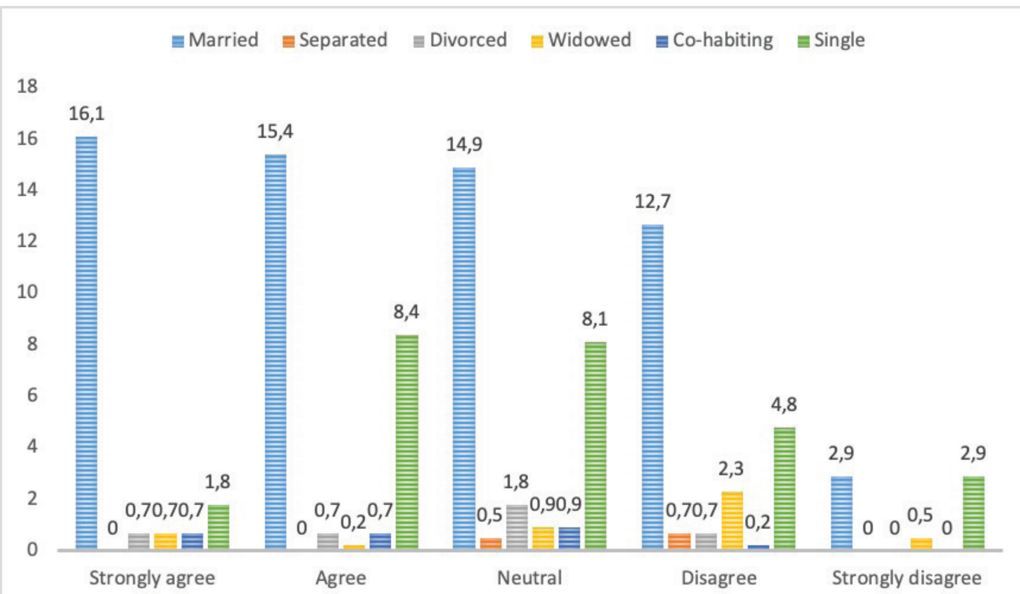
Another woman from the informal sector reported that "*both men and women need to plan for retirement. It is very important. But women need to do more than men because women most often do not have social security*". In furtherance to this, there is the issue of women living longer comparatively than men and therefore the need to be forearmed against that. Significant about retirement planning is the facilitation by income which is comparatively low among women. For example, it was observed that "*in the case of women the issue is low income flow in some cases, whereas there is more financial flow in the case of their male counterparts*" (Informal sector woman).

Women's Retirement Preparations are Patterned around Men's

Divergent views were also expressed on whether a woman's retirement preparations are tied to those of a man in the Ghanaian society from a marital status point of view. A cross tabulation between a woman's preparation for retirement is tied to that of a man and marital status showed that married respondents tend to strongly agree with this assertion, whereas only 1.8% singles do so. Singles present a more marked tendecy for agreement, neutrality or even disagreement, but married participants also espouse these perspectives.

Figure 4

A Woman's Retirement Preparations Are Tied to Men's



Source: Field data, 2016.

Using the qualitative data, perceptions in relation to the tying of women's retirement plans around those of men has been disaggregated along the pathways of interdependent gender dynamics; independent dynamics in retirement planning and attitudinal patterns as follows.

Interdependent Gender Dynamics in Retirement Planning

From the interview data, three participants who agreed to the assertion that, a woman's retirement preparations are tied to that of a man documented the following facts:

> *A man is always the head of the family* (Informal sector man).
>
> *From observation, most female retirees always want to be closer to their partners at houses and do whatever activity thereof* (Informal sector man).
>
> *Since the man is generally considered the head of the family and is likely to focus on acquiring physical assets e.g. homes and women tend to support in such areas* (Formal sector woman).

Essentially, these statements are reflective of interdependent patterns. It is also a depiction of Bandura's (1977) stipulation.

Independent/separate Gender Dynamics in Retirement Planning

The fact that retirement planning can be undertaken by both men and women independently was further echoed. This point is backed by the quote that *"the woman can do hers separately"* (Informal sector man). In support of the above point, disagreeing views from twelve out of 20 participants that has shown the extent of independence between men and women, even in such matters as retirement planning, including different levels of societal responsibilities. As a result, the following observations have been made:

> *They are two independent people as well as contributors* (Informal sector woman).
>
> *Different responsibility levels considering our culture* (Formal sector woman).
>
> *A woman's needs and reasons for retirement preparation are totally different from those of a man* (Formal sector woman).
>
> *Because when you are not there, his family will say it is all his* (Informal sector woman).

> *Beijing conspiracy' is revoked by the notion that 'whatever a man can do, a woman can do same and even better* (Informal sector woman).
>
> *I am coming from the premise of the fact that I was an individual long before I got married and that fact still remains. And so I need to take care of my own needs including the retirement related ones* (Formal sector woman).
>
> *Marriage is a unifier but not a terminator of individual destinies and the associated individual responsibilities* (Informal sector woman).
>
> *Men are contemporarily self-seeking and self-serving and women need to watch out more for themselves when it comes to their retirement matters and needs* (Formal sector woman).
>
> *If in my old age after I have retired, my husband dies, and family contestations ensue and if I have not planned for my own sake, where do I go from there? As women, we need to wise up on these issues because sometimes the men die and their families come to take up everything, leaving their widows poor in the real sense of the word. It is just like milking the rhino* (Informal sector woman).
>
> *As spouses, we do different jobs and so there is the need to plan separately* (Formal sector man).
>
> *In fact, men and women planning independently or separately only leads to advantageous resource mobilization and accumulation for a better old age* (Formal sector man).

The above voices have weaved notions of marriage dynamics extensively into the discussion of retirement planning including family related maltreatments unjustly meted out to women, especially on the demise of their spouses. This attenuates the call for independent planning for retirement despite linkages to marital ties, while highlighting retirement planning related individualisation. These views also extend the argument made based on the quantitative data presented in Figure 5 above.

Therefore, not all women's preparations may be tied to that of men. For example, another woman participant argued that 'a woman's retirement preparations are tied to those of a man in society mostly for housewives but not for non-house wives. Robertson (1984) intimated that gender duality discourse as earlier stated brings to the fore a gender division of labor where economic responsibility of both men and women is seen as separate but complementary and where what is expected of each person is well defined.

Attitudinal Patterns in Gender Dynamics in Retirement Planning

The views of men in the in-depth interview data generally demonstrates attitudinal patterns that compared to women, men are compelled to plan, which implies that women compared to their male counterparts are more serious in life. Three participants refered that: *"men only plan when the company facilitates that"* (Formal sector man). However, this assertion may not be a given, as the contexts that induce such grounds may differ across locations, cultures and epochs in time among others. Additionally, it was alleged that *"women are more serious about things whereas men are not"* (Informal sector man). Further, it was reported that *"women invest in savings, bonds, etc, men invest in T-bills, savings, bonds, etc"*. (Formal sector man).

DISCUSSION

The findings show that a great deal of difference exists between men and women in terms of how they prepare towards retirement because the latter do so in view of the cultural expectation that they should take care of the home. The findings indicate that by virtue of retirement aspirations, female workers expected to ascertain social networking compared to their male counterparts who envisaged financial security. These retirement aspirations and/or expectations by and large precipitated the institution of workers' plan portfolios. Predominantly, more women instituted susu, savings, pension contributions including the monitoring of retirement investments, land acquisition, periodic health checks. Both gender however undertook the joining of associations. It is worth noting that these aspirations and/or expectations confirm Atchley's theoretical statement that retirement planning should at least in most cases precede the mobilization of retirement life oriented resources.

The workers opined that a woman's retirement preparations are tied to those of a man in the Ghanaian society, particularly the married ones, mostly the housewives but not for non-housewives. The adduced reasons encompass the perspective that men are the heads of their households and the consideration that women desire to be close to their partners. Yet, not all women's preparations may be tied to those of men. On the other hand, men often plan for retirement with the support of their female partners. More married respondents strongly agree with the assertion that women's retirement plans are tied to those of men. This study shows that there is a strong association or relationship (Cramer's V test value of 0.706) between gender and retirement planning. This is indicative of the fact that women suffer marginalization (Dzorgbo & Gyan, 2014) in financial terms, with implication for negative name calling, stereotyping and stigmatization in all facets of life including gendered retirement planning dimensions.

The disagreeing views show the extent of independence between men and women in matters of retirement planning pertaining to the fact that they are two independent people as well as contributors with different responsibility levels including the fact that women's needs and reasons for retirement preparation are entirely different from those of men, not to mention consideration of extended family interferences. This suggests that couples are increasingly undergoing two retirements. Penultimately, what prompts women to plan differs from what motivate men. This provides a reinforcement of the importance of considering gender when seeking to understand the variables predictive of planning tendencies.

Retirement planning is facilitated by incomes, which, men are more endowed with than women. These differences in income might have implications for women's extent of planning, including the propensity for risk aversion. Thus, whereas men focus on physical assets, women concentrate on social relationships or networking pathways. The latter has implications for financial risk taking and the associated risk aversion.

The findings also show gender dynamics in interdependent; independent/separate and attitudinal patterns situated within cultural underpinnings. On the one hand, planning interdependently for retirement may highlight attributes of corporate planning for a singular course albeit post-retirement life. On the other hand, planning separately for the same course only increases the urgency of planning for life in general and retirement in particular. After all, life and its extricate trajectory is unpredictable and therefore must be guarded against to prevent unpleasant exigencies, such as family related maltreatments unjustly meted out to women, especially on the demise of their spouses. This brings to the fore the importance of retirement planning related individualisation. Further, the role of attitudinal patterns cannot be underestimated. In essence, culture then underpins and/or influences the gendered dimension of retirement planning. In addition, men and women experience retirement differently, so does their experience of adjustment to retirement. The difference may also lie in their respective retirement aspirations, where to live after retirement, time spent planning, the duration thereof, income levels, as well as the focus of the plan. Existing studies (e.g., Fisher 2010; Jacobs-Lawson, Hershey & Neukam, 2004) have reported that most gender differences in planning are due to the fact that women have lower incomes compared to men. The variables that "prompt women to plan differ from those that motivate men, thus reinforcing the importance of considering gender when seeking to understand the variables predictive of planning tendencies" (Jacobs-Lawson et al., 2004, p. 66).

Looney et al. (2007) assert that women appear to be conservative in their investment ventures because of "*the tendency to sacrifice higher returns in favor of safety to hurt the retirement portfolios of female investors the most*" (p. 1). Men and women define and experience retirement differently (Robin et al., 2011) and therefore plan for it differently. Besides, men spend more time planning than women do (BMO Wealth Institute, n.d). Similarly, Jacobs-Lawson et al. (2004) document that there are gender differences in the time spent thinking about retirement and planning towards it. Significantly, the paramountcy of women's financial decision making responsibilities are because of their longer life span compared to men (BMO Wealth Institute, n.d; Fisher, 2010; Morrin et al., 2011). Further, BMO Wealth Institute argues that historically men's identities have been very closely tied to their work, which is often not replaced on the event of retirement. There is evidence to suggest that a woman's life experiences prepare her better for retirement when "*the job experience no longer takes centre stage*" (n.d. p.7).

A number of studies have found that men think more about their future life in retirement (Jacobs-Lawson et al., 2004) and their future finances and are more likely to discuss retirement with friends, relatives, and co-workers (Moen et al., 2000). But the differences were statistically significant, but relatively small (Jacobs-Lawson et al. 2004; Moen et al., 2000), or no gender differences were found (Schellenberg et al., 2005). However, other research has found no gender differences in financial preparedness (Hershey & Mowen, 2000). Inconsistencies and contradictory findings in the current literature suggest that women are less disadvantaged in terms of retirement planning currently than in previous epochs.

The notion of tying women's retirement plans around those of men may also be analyzed as follows. Developmental processes always take place in the context of ongoing social relations, including developmental shifts that occur with retirement. Individuals frequently decide to retire on the basis of changes in others' health and/or retirement exits or plans. Furthermore, the retirement experience is played out in a network of shifting social relations. It is crucial to consider the work or retirement statuses of both spouses, given that each spouse's retirement transition represents an important life event for the couple, requiring adjustment on the part of both spouses. Research on retirement adjustment suggests that marriage and family relationships serve as social–relational resources in retirement adjustment (Mutran et al., 1997). Strong emotional support from a spouse may well help individuals overcome stressful life events, thereby sustaining their psychological well-being.

THE RETIREMENT PLANNING GLASS CEILING

Tzannatos (1999 cited in Darkwah, 2014, p. 137) opines that inequalities hurt and that they hurt both women and men. This article provides a sociological analysis of some of the challenges or problems men and women encounter from structure and agency perspectives. These are grouped under (1) economic and (2) socio-cultural factors.

Economically, the fact that financial resource is the oil that greases the retirement planning machinery cannot be underestimated. Successful retirement planning implies that the planner must have some amount of money and the requisite planning information. Yet, the literature on gender issues posits that generally women have inadequate financial resources (Dzorgbo & Gyan, 2014) with respect to life in general and towards retirement planning in particular. Thus, to be successful, women have to be mostly dependent on their spouses for financial support.

Women's retirement planning to a large extent is shaped by cultural considerations or factors. "*Traditionally, women and men are usually socialized to assume different roles in society*" (Dzorgbo & Gyan, 2014, p.131). In performing such roles, women move in and out of work to have babies or take care of their ailing spouses, parents, grandparents and significant others. Is is not uncommon that married women have to quit their jobs upon childbirth (Darkwah, 2014). Collectively, these issues have implications for their financial status, as retirement planning in its entirety relies on funds, a resource that women tend to lack in abundance. These structural challenges encountered by women have tremendous repercussions for their preparedness towards retirement in its adequate measure.

CONCLUSION AND RECOMMENDATIONS

The study espouses the fact that gender is strongly related to retirement planning. Gendered retirement planning espouses retirement planning disaggregated along gender lines, including strengths dissipated financially albeit quasi-financially in favor of men and women. Gendered retirement planning dynamics in interdependent independent/separate and attitudinal patterns are situated within cultural underpinnings. Culture underscores and/or influences the gendered dimension of retirement planning. However, women's retirement planning process is by and large delimited by low income status including risk aversion and cultural connotations. Retirement and retirement planning is now of greater concern for women. However, women are less likely than men to actively plan for retirement, women appear to have a greater need to intitute more plans than men, and what prompts women to plan differs from what motivates men, inasmuch as married women and their co-habiting counterparts' mobilized retirement resources and/or plans are tied to those of their men.

Based on the findings of this study, the following recommendations are proposed. First, women's increasing representation in the workforce requires a reexamination of their retirement plans and the factors that enable them in Ghana. Second, the extent to which women are disadvantaged in terms of their retirement planning and the factors that may affect retirement plans needs to be assessed. Future promotional initiatives should be aimed at these groups to assist their financial preparations for the future. Third, the essence of considering gender when seeking to understand the variables predictive of planning tendencies is recommended. Further research on gender and retirement planning should explore women's general orientation, interests and priorities, including how they are mobilizing retirement resources strategically.

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Connected but not Engaged: A Tale of Two Governorship Candidates' Social Media Mobilization in a Gubernatorial Contest in Oyo State, Southwest Nigeria

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Abstract

The study analyses the engagement of potential voters with two major candidates for governor in the 2019 gubernatorial election in Oyo State, South-West Nigeria. The study explored the interaction, pattern of engagement as well as the extent to which their followers focused on issues of their campaigns on Facebook, Twitter and LinkedIn. To achieve these aims, the researchers put forward content-analysis of 3,193 comments of the followers of the two candidates on the three platforms from December 2018 to February 2019, using purposive and constructed week sampling techniques. Results showed that the two candidates were able to engage followers on the selected online social media platforms. However, one had a more robust engagement than his rival. It was also noted that a large percentage of their followers (1,409 in 3,193) did not key into the campaign issues as expected. Despite the level of engagement, a one-way communication pattern was noticed on the part of the two candidates. Their followers' questions and observations were ignored. It is therefore recommended that media strategists of politicians should always make their engagement with the citizens online two-way symmetrical. Social media platforms should equally not be downplayed in political campaigns by Nigerian politicians.

Keywords: Social media, Citizen engagement, LinkedIn, Facebook, Twitter, Adelabu, Makinde.

Ligados, mas não comprometidos: Um Conto de Mobilização dos Meios de Comunicação Social de Dois Candidatos a Governador numa Disputa Governamental no Estado de Oyo, Sudoeste da Nigéria

Sumário

O estudo analisa o envolvimento de potenciais eleitores com dois grandes candidatos a governador nas eleições governamentais de 2019 no Estado de Oyo, no sudoeste da Nigéria. O estudo explorou a interação, o padrão de envolvimento, assim como a medida em que os seus seguidores se focaram nas questões das suas campanhas no Facebook, Twitter e Linkedin. Para alcançar estes objetivos, os investigadores apresentaram uma análise de conteúdo de 3.193 comentários dos seguidores dos dois candidatos nas três plataformas entre Dezembro de 2018 e Fevereiro de 2019, utilizando técnicas de amostragem com objetivos específicos e construídas durante a semana. Os resultados mostraram que os dois candidatos conseguiram atrair seguidores para as plataformas de redes sociais em linha selecionadas. No entanto, um tinha um compromisso mais robusto do que o seu rival. Foi igualmente observado que uma grande percentagem dos seus seguidores (1.409 em 3.193) não se envolveu nas questões da campanha, como previsto. Apesar do nível de envolvimento, foi observado um padrão de comunicação unidirecional por parte dos dois candidatos. As perguntas e observações dos seus seguidores foram ignoradas. Por conseguinte, recomenda-se que os estrategas dos meios de comunicação social dos políticos façam sempre com que o seu envolvimento com os cidadãos on-line seja simétrico nos dois sentidos. As plataformas dos meios de comunicação social também não devem ser menosprezadas nas campanhas políticas dos políticos nigerianos.

Palavras-chave: Comunicação social, Envolvimento do cidadão, LinkedIn, Facebook, Twitter, Adelabu, Makinde.

INTRODUCTION

In recent years, social media are said to have recorded a significant impact on public discourse and communication in society. In particular, social media are increasingly being used in political contexts. More recently, micro-blogging services (e.g., Twitter) and social network sites (e.g., Facebook) are believed to have the potential for increasing political participation (Theocharis & Lowe, 2016; Chu, Tseng, & Chen, 2019). While Twitter is an ideal platform for users to spread not only information in general, but also to publicly share political opinions through their networks, political institutions (e.g., politicians, political parties, political foundations, etc.) have also begun to use Facebook pages or groups for the purpose of entering into direct dialogue with citizens and encouraging more political discussions (Stieglitz & Dang-Xuan, 2012). This trend raises many questions such as the nature of social media for political engagement, the place of social media interaction in offline political participation, among others.

In fact, scholars believe that the rise of new technologies has brought about a meaningful shift in the landscape of communication, and continues to transform the interactive patterns of citizens. As such, Bae (2014) argues that the use of digital technologies allows individuals to easily connect with others, and easily navigate communicative boundaries to discuss matters that interest them. No wonder social media has been defined in diverse ways. For instance, Kietsmann, Hermkens, McCarthy and Silvestre (2011, p.241) posit that "social media employ mobile and web-based technologies to create highly interactive platforms via which individuals and communities share, create, discuss and modify user-generated content." Spates, Kaufmann, Lin, Lachlan and Spence (2020) describe user-generated content as any online content in the form of opinions, comments, community reports, photos or response to other online users' comments. On the other hand, Theocharis and Lowe (2015) see social media as uniform platforms which can either mobilise or reinforce political participation. Furthermore, among political communication experts, online or social media engagement is also known as digital engagement. According to Bonneman (2013), cited by the International Association for Public Participation in its 2017 Working Paper, digital engagement is the "use of information and communications technologies to support, enhance or extend public participation and civic engagement processes."

In 2008, the U.S. Presidential elections marked a historic episode in the political realm, when for the first time, social networking sites allowed users to share their support for a specific candidate or interact with others on political issues (Muntean 2015). The trend continued in 2016 when Hillary Clinton of The Democrats and Donald Trump of The Republicans ran for the presidency of the United States of America. Also, in Asia, Asia News Monitor (2010) states that the 2012 South Korean presidential election offers an excellent opportunity to explore the dynamics of cross-cutting exposure and political expression on social media. Reports, during the Egyptian political upheavals in 2011, show that citizens in Egypt communicated primarily through social media to learn about protests, which increased the odds of their participation (Tufekci & Wilson, 2012).

In Nigeria for instance, the use of social media by political office seekers for political mobilisation first surfaced in 2011 Nigerian national elections. This claim did not undermine its deployment to monitor the 2007 electoral process which stimulated public discussion and collective action (Ifukor, 2010). Since then, Nigerians have explored the power of social media platforms like Facebook and Twitter to interact and engage in political campaigns, marketing, sensitisation, mobilisation and even propaganda in subsequent national elections (Taiwo, 2015; Aduloju, 2016). For electioneering purposes, social media platforms were employed in the 2015 elections for constructive and destructive arguments with politicians (Aduloju, 2016) to facilitate mass political participation; influence political self-expression and seek information on the elections (Jibril & Yakubu, 2017).

Interestingly, data suggest that as the use of social media percolates from national elections down to elections at other levels of the federating units in the country, the purpose of use begins to assume a frightening dimension. The social media platforms became instruments in the hands of politicians to abuse, malign and spread damaging rumours about their opposing candidates. For instance, the November 2017 Anambra State, South Eastern gubernatorial election was largely criticized for what Dunu (2018) described as "internet brigandage, fake news, social media nuisance and character vilification" which characterized the use of social media (especially Facebook and WhatsApp) platforms for campaigns for the elections. On a similar note, the September, 2018 Osun State, South-Western governorship election also reported politicians inducing registered voters with money using social media. These social trends indicate that social media is gradually becoming a significant tool for political interaction, participation and marketing with a high tendency to be misused by Nigerians and Nigerian politicians (Ugwuanyi, Olijo, & Celestine, 2019; Shadrach & Apuke, 2020). Consequently, this gives impetus to this study to examine the politician's online engagement of candidates in Nigerian state-level elections. Thus, this study sought to do this by interrogating the politician-citizen online engagement of two major aspirants for the 2019 governorship election in Oyo State, South-Western Nigeria.

Relying on the propositions of the Theory of Information Society, this study sought to know the direction of engagement and extent of interaction the two candidates had with their online followers. An information society, as postulated by Mhlomi and Osunkunle (2017), is characterised by interactive communication platforms, which allow the potential voter and the political candidate to disseminate information and provide feedback to one another. Such society considers the creation, distribution, use, integration and manipulation of information as a significant economic, political and cultural activity. That kind of society, enabled by the internet, provides opportunities for more people to represent their views and to participate online in communicative dialogues. However, one of the uncertainties over this access to user-generated content is that these new voices might not be heard and responded to by the traditionally powerful actors in society and their voices might not influence and control social actions. The study probed the kind of communicative dialogue that was apparent from the two governorship candidates' connection with followers and potential voters online.

STATEMENT OF PROBLEM

The available body of literature on political communication indicates that many researchers have conducted studies on the influence of social media on citizens' political participation, digital engagement and political participation as well as the use of social media for political marketing and electronic participation (Aichholzer & Allhutter, 2009; An, Cha, Gummadi, & Crowcroft, 2011; Vonderschmitt, 2012; Ekman & Amna, 2012; Lamprianou, 2013; Hemphill & Roback, 2014; Ayankoya, Cullen & Calitz, 2015). This scholarly attention has established the importance of social media in political mobilization across the world.

The trend to use social media became noticeable in Nigeria shortly before the 2011 general elections when the then-president Goodluck Jonathan launched *My Facebook Friends and I* in Lagos, the commercial capital of the country (Okoro & Nwafor, 2013). Since then, the trend has become more glaring in both national and state elections in the country. Elections that were conducted after the 2011 experience witnessed a huge deployment of social media for political campaigns (Miller, 2016; Chinedu-Okeke and Obi, 2016). Specifically, patterns of online political communication studies from Nigeria show empirical findings on youth networks on Facebook and Twitter during the 2015 general elections in Nigeria (Aduloju, 2016), the use of social media for political marketing (Ayankoya, Calitz & Cullen, 2015), reactions of users to the 2015 presidential election on Facebook (Jibril & Yakubu, 2017), the role of social media in the 2015 presidential election in Nigeria (Olowojolu, 2016), etc.

There has equally been some attention paid to individual online behaviour of selected Nigerian politicians and their online engagement. For instance, Aduloju (2016) posits that Facebook and Twitter played important roles before the 2015 presidential election in Nigeria, especially in the areas of electioneering, political campaigns, mobilisation and enlightenment of the electorate; Olowojolu (2016) asserts that Ex-President Jonathan actively engaged millions of Nigerian youths through the active use of social media like Facebook, while Barlett, Krasodomski-Jones, Daniel, Fisher and Jesperson (2015) reveal that Muhammadu Buhari's digital drive (social media) was intended to appeal to younger people. This pattern is an indication of a minimal scholarly attention received by candidates using social media to engage voters online. This is the void this study sought to fill by exploring further the engagement of citizens on three social media platforms (Facebook, Twitter and LinkedIn) by two major governorship aspirants in the 2019 gubernatorial election in Oyo State, South-West Nigeria with the aim of determining the direction, focus and level of engagement in the citizen-politician interaction.

LITERATURE REVIEW

Social Media as a Tool for Mobilization and Political Participation

In recent years, social media are said to have an impact on public discourse and communication in society. In particular, social media are increasingly used in political context. More recently, microblogging services (e.g., Twitter) and social network sites (e.g., Facebook) are believed to have the potential for increasing political participation. While Twitter is an ideal platform for users to spread not only information in general but also political opinions publicly through their networks, political institutions (e.g., politicians, political parties, political foundations, etc.) have also begun to use Facebook pages or groups for the purpose of entering into direct dialogues with citizens and encouraging more political discussions (Stieglitz & Dang-Xuan, 2013, p.1).

Political behaviourists keep arguing on the implications of social media use and offline political participation. Some have defended that the use of social media does not have positive effects on offline political participation of people, while some have argued that it does have great effects on offline political participation. For instance, Theocharis and Lowe (2015) assert that the use of Facebook (a social medium) has a clear negative effect on civil and political participation, while Zhang, Johnson, Seltzer, and Bichard (2009) and Enjolras, Steen-Johnsen and Wollebaek (2013) reported positive effects of Facebook on political participation. Sharing the positive impact of social media, Vraga, Anderson, Kotcher and Maibach (2015) argue that the media promote politicians and their activities. Even, the multimedia nature of social media makes information (be it political or otherwise) easily available and accessible for people (Calderaro, 2018). In fact, the social media really set public agenda in the political campaigns and other electioneering activities in Israel (Haleva-Amir, 2011; David, Zhitomirsky-Geffet, Koppel, & Uzan, 2016; Satterfield, 2016) and the United States of America (Carlisle & Patton, 2013; Quinlan, Gummer, Roßmann, & Wolf, 2017).

Citizen Engagement (Online) as a Form of Political Communication

Many political communication experts and new media strategists have defined and discussed the concept of *citizen engagement*, *citizen involvemen*t or *citizen participation* in different ways. One of the emerging views is that engaging citizens for political discussions on social media platforms is a way of developing and implementing innovation in the political space. Davies and Simon (2013) for instance describe citizen engagement with three attributes. One, people participate in engagement activities voluntarily, though incentive can be given for participation. Two, engagement requires some form of action from citizens as participants are not passive. Last, engagement activities are usually directed towards a common purpose or goal- social mission. According to Meskell (2009, p.1-2), citizen engagement "builds communities around the issues that people find important, lets the community members interact with one other, and eliminates barriers associated with physical distance and travel costs and other impediments facing citizens who want to have their voices heard".

The means by which political actors communicate have changed fundamentally. Nowadays, a lot of this communication is done via the Internet and social media (Vliegenthart & Mena Montes, 2014 citing Smith & Rainie, 2008). Research shows that aside politicians and media performing the role of agenda control, the citizens also selectively attend to political issues that interest and are important to them at the moment of engagement. With strategic communication, Mead (2018) establishes that citizen engagement offers both the citizens and development agents a better understanding of problems and needs, opinions and priorities as well as promotes community representation in decision making. When citizens are involved in decision making through effective engagement, there will be open and more transparent leadership that builds citizen trust in government. However, the researcher argues that online engagement might result in disconnection between citizens and politicians when citizens' attention can no longer be sustained. Disconnection is also possible because engagement involves a great deal of planning and foresight.

Online Citizen Engagement among Nigerian Politicians

In Nigeria, politicians are gradually annexing the potential of social media unlike in developed nations where a radical adoption of social media for political campaigns and engagements is becoming a trend. An instance is the report of the International Centre for Investigative Reporting (ICIR 2018) about the campaign behaviours of five leading candidates on Twitter before the 2018 gubernatorial election in Osun State. The analysis scored all the candidates very low in engaging citizens/potential voters on Twitter.

However, Dunu (2018, p.8) argues:

> social media may involve more people to participate. Getting information, stating opinions and communicating with a large number thus becomes possible and easy. This is an important reason why politicians and political parties and other political actors find it to be important and that is why we see that in political campaigns social media have become effective tools for mobilization. The Anambra 2017 and the 2015 general elections in the country are a case in point.

She adds that during the 2011 general elections, many politicians, the presidential aspirants, gubernatorial aspirants and other individuals mostly and widely used Facebook and Twitter to connect with voters and constituents, for political campaign and sensitization.

> Social media outlets are essential to politicians and political parties, enabling them to gain support, encourage participation and have an open and continuous dialogue (Michael, 2017, p.17).

Okolo, Ugonna, Nebo and Obikeze (2017) maintain that Nigerian politicians have begun the use of Facebook and Twitter because the media platforms are believed to have the potential of positively influencing political participation. They further submit that the use of social media "secures victory and encourages interaction between political parties/candidates and voters, and most times to portray positive image of the political candidates".

Also in another perspective, Michael (2015) finds out that the social media were more than communication platforms in the 2015 general elections in Nigeria; the media become strong forces of political mobilisation and means through which netizens took part in the electoral process with the hope that democracy and mass participation in politics could be attained with these media.

Moreover, Okoro and Santas (2017) investigated the utilisation of social media for political communication in the 2011 Nigerian presidential election and found out that social media influenced the respondents' choice of presidential candidate, affirming that the two main presidential candidates were more popular because they used social media in their political campaign. Another revealing finding was the respondents' affirmation that their voting pattern during the elections was greatly influenced by social media usage (political communication on social media) of the two candidates. On the contrary, Akinlade's (2015) investigation reveals that though the Nigerian youths resident in the southeastern region is very active on social media, social media does not have an influence on their voting preferences.

When Barlett, Krasodomski-Jones, Daniel, Fisher and Jesperson (2018) examined the Nigerian 2015 general elections, they reported that Twitter was mostly used by politicians for political campaigns, and it mobilised and influenced people to vote for a particular candidate. A similar finding was reported by Apuke (2017). According to them, Facebook was used in the 2015 senatorial electioneering campaigns in southern Taraba, and that action influenced electorate to vote a particular candidate. The study of six researchers, Bright, Hale, Ganesh, Bulovsky, Margetts and Howard (2017) on the political Twitter activity in the 2015 and 2017 elections in the United Kingdom also reveals that Twitter-based campaigning help win votes. Interestingly, they argue that when politicians have more followers on Twitter, the possibility of recording greater direct mobilisation of the followers is high.

Similarly, Apuke and Tunca (2018) submit that in 2011 and 2015 general elections in Nigeria, politicians employed social media to engage potential electorate due to its participatory nature and potential for political campaigns, electioneering mobilization as well as ideological manifestation/trumpeting. However, during these years, the researchers assert that politicians used social media to de-market or destroy the image of their opposition party's standard-bearer alongside his political party.

Going by the current information age, every politician who is ready to involve and engage online electorate must show presence and activeness on important social media platforms. In an opinion article published by the Nigerian Tribune, Dike (2018) categorically emphasizes:

> That many Nigerians have embraced and are deeply involved in the world of social media may be stating the obvious as it would be disastrous for politicians not to fully embrace this important information platform. Election battles are going to be on social media and less at the big rally fronts. Politicians will have to familiarise themselves with social media, make their presence felt and stay engaged positively with the electorate.

Dike states further that "Twitter and Facebook have become instrumental in organising campaigns as campaigns are going viral. They allow like-minded voters and activists to easily share news and information such as campaign events with each other. That's what the "Share" function on Facebook and "retweet" feature of Twitter is for."

In the submission of Orjimi (2018), the two main presidential candidates in the 2019 election in Nigeria, President Muhammadu Buhari and Alhaji Atiku Abubakar, heavily used Facebook and Twitter to communicate and emphasize their campaign promises to the potential electorate. In his words, "ahead of 2019 however, it would seem like the two leading candidates, APC's Muhammadu Buhari and PDP's Atiku Abubakar, have been engaging in lots of social media battles for dominance. Although some of the engagements by their teams and supporters have been acidic, puerile and shallow, the candidates and their running mates (APC's Yemi Osinbajo and PDP's Peter Obi) have repeatedly used social media increasingly to either pass crucial pieces of information or address trending issues for or against themselves."

However, Ezeibe (2015) establishes that social media use by aspirants during the 2015 general elections was not centred on issue-based campaigns. Instead, social media users focused on issues that are insignificant to democratic governance.

Recent observations have pointed out that the contemporary and technologically savvy politicians now complement their online campaigns with infographics. Ching (2018) asserts that aside from that infographics are used by major companies to illustrate statistics, research results, and business presentations, they are now increasingly prevalent as a political campaign and promotional tool. According to the researcher, infographics which are also used to lure and retain visitors (people) with useful information in an attractive format perform four significant functions: they increase traffic over time (the users achieve some degree of stardom on social media networks like Facebook, Twitter or LinkedIn), enable long-term investment in the success of campaigns, improve overall authority and rankings as well as encourage engagement and people's interest.

RESEARCH OBJECTIVES

1. To evaluate the focus of the citizens-politician engagement of the two major governorship candidates in the 2019 gubernatorial election in Oyo State on Facebook, Twitter and LinkedIn.

2. To explore the patterns of mobilisation adopted by the two aspirants (Was the pattern targeted at campaign issues, attack on the personalities of the candidates or both? How did the candidates respond to the followers' questions? To what extent did the candidates complement their engagement with multimedia like corresponding pictures, videos and infographics?)

3. To examine the extent to which followers of the two candidates engaged and keyed into issues of the campaign.

RESEARCH QUESTIONS

The following research questions were raised for the study:

- **i.** To what extent did Engineer Seyi Makinde (of the PDP) and Mr Bayo Adelabu (of the APC) engage their followers on Facebook, Twitter and LinkedIn?
- **ii.** What are the patterns of Engineer Seyi Makinde and Mr Bayo Adelabu's citizen communication/mobilisation on Facebook, Twitter and LinkedIn?
- **iii.** To what extent did the followers of the two candidates key into issues of the campaign?

METHODOLOGY

The researchers adopted content analysis research design, and the study population comprised the comments of all the followers of Engineer Seyi Makinde and Mr Bayo Adelabu on their campaign posts on Facebook, Twitter and LinkedIn. The study period was from December 2018 to February, 2019. As of February, Engineer Seyi Makinde (@seyimakinde) had 12,800 followers on Twitter while Mr. Bayo Adelabu (@BayoAdelabu) had 6,623 on Twitter. On their Facebook pages, Engineer Seyi Makinde (Engineer Oluseyi Makinde) had 60,230 followers while Mr Bayo Adelabu (BayoAdelabu) had 37, 486 followers. Though Mr Bayo Adelabu operated no LinkedIn account, Engineer Seyi Makinde had 20, 519. The researchers adopted purposive and constructed week sampling techniques. Purposive sampling was used to select 3, 193 comments that resonated with the content categories the researcher worked with. The number of content categories for each of the candidates differed because the numbers of their campaign promises were not similar. On the other hand, constructive week sampling technique occurs whenever contents are stratified based on the days of the week. Since the scope of this study lasted three months — December 2018 to February 2019 —, the total number of weeks constructed for the content categories then rose to twelve. After coding and analysis, 877 comments were used as the sample size for Mr Bayo Adelabu's engagements on Facebook and Twitter. His LinkedIn engagement was not included in the study because he did not have a LinkedIn account. However, for Engineer Seyi Makinde of the PDP, 2,316 comments were selected as sample across his Facebook, Twitter and LinkedIn accounts. Altogether, 3,193 comments on the Facebook pages, Twitter and LinkedIn accounts of the two candidates became the sample size for the entire study. Also, every issue-based engagement of the two candidates starting from December 2018 to February 2019 was included in the sample. Putting the purpose of the study in mind, the researcher did not select any of the two candidates' posts that intimated their followers with their campaign trains within the nooks and crannies of Oyo State.

The researchers also adopted two different coding sheets for the two candidates because the content categories used for each candidate differed. For Engineer Seyi Makinde of the PDP, his campaign promises were adapted as the content categories for his social media engagement. A similar pattern was followed for Mr Bayo Adelabu of the APC. Engineer Makinde's campaign promises included "Inclusive Government, Job Provision, Sustainable Use of Resources, Adequate Funding of Education, Improved Living Standard, Affordable Health Care, Infrastructure (roads, electricity and water) and Agriculture" while those of Mr Adelabu were to create "More Jobs, More Revenue, More Cottage Industries and More Money for Farmers (more food security and improved agriculture for people) as well as Improved security (through massive street lighting)." All these were categorised as "Focus of Engagement." The content categories for the second research question (for the two candidates), which was tagged "Pattern of Engagement", include "Issue-based engagement from the citizens, Personality-attack from the politician and Personality attack from citizens." Others were "Politician's response to questions and issues, use of multimedia aids during engagement and irrelevant comments from citizens." The units of analysis for the exploration comprised words, sentences and themes that resonated with the content categories.

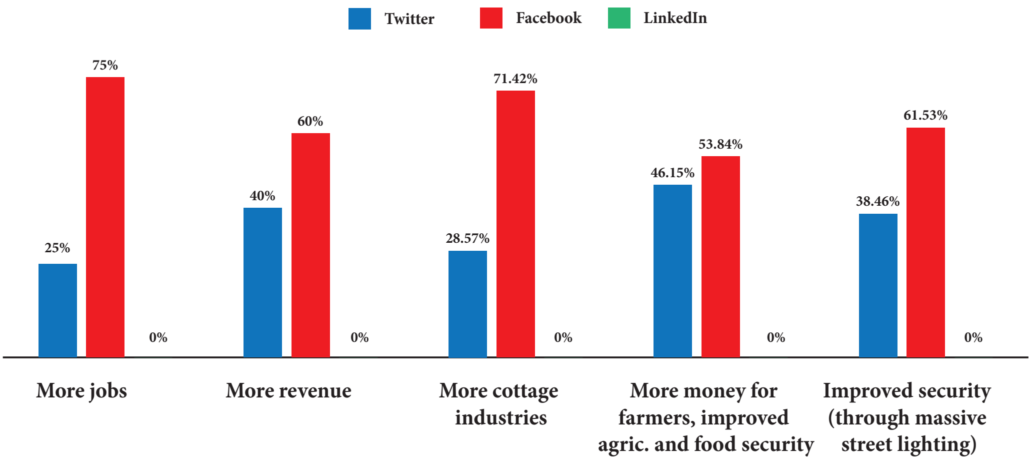
RESULTS AND DISCUSSION OF FINDINGS

The extent of the Candidates' Mobilization of Their Followers on Facebook, Twitter and LinkedIn

The analysis in Figure 1 shows that Mr Bayo Adelabu engaged his potential voters to a large extent. He flooded his two main social media handles, Facebook and Twitter with campaign promises such as creation of more jobs, facilitation of more Internally Generated Revenue (IGR) and establishment of more small industries. Other promises included improved agriculture and food security as well as improved security through massive street lighting and CCTV monitoring. He discussed more of these issues on Facebook than Twitter. Mr Adelabu's readiness to create more jobs amounted to 75% on Facebook, but 25% of Twitter. His proposal to create more revenue through IGR indicated 60% and 40% on Facebook and Twitter respectively while his quest to establish more cottage industries showed 71.4% on Facebook, but 28.6% on Twitter. The analysis further shows that Mr Adelabu's plans for farmers through improved agricultural system and food security amounted to 46.2% and 53.8% on Twitter and Facebook respectively. His posts on improved security resulted in 38.5% on Twitter, but 61.5% on Facebook.

Figure 1

Mr Bayo Adelabu's Focus of Mobilization on Facebook and Twitter



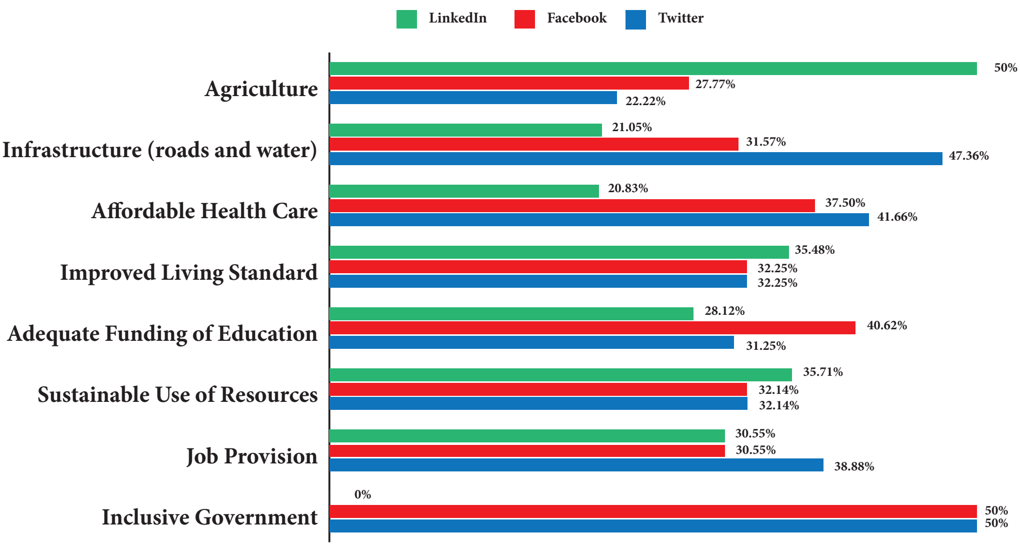
Source: Researchers' Analysis (2019)

In addition, the figure clearly shows that Mr Bayo Adelabu used more of Facebook than Twitter to engage potential voters, but he did not adopt LinkedIn throughout the three months. In his engagement on Facebook, creating more jobs recorded high mention while creating more cottage industries came second, followed by improved security. Facilitating more money for farmers through improved agricultural practice and food security came next to generating more revenue for Oyo State.

For example, he believed that if storage facilities are provided for farmers in Oyo State, if the old farm settlements are refurbished, if a commodity board is established to stabilize prices of farm produce and if livestock farming is maximally encouraged, the outcome would not only improve the well-being of farmers but also increase the state's IGR, create more employment for people and enhance food security and sustenance in Oyo State. He also assured the potential voters that his administration would invest in tourism and relaxation hubs, thereby improving the economic status of the state. On security, Mr Bayo Adelabu was convinced that having CCTV network in some hotspots in Ibadan, the state capital, will curtail crimes before such crimes are even committed, considering the fact that control rooms and security call numbers would be available all the time.

Figure 2

Engineer Seyi Makinde's Focus of Mobilizations on Facebook, Twitter and LinkedIn



Source: Researchers' Analysis (2019)

Figure 2 shows an insight on how Engineer Seyi Makinde of the PDP directed his engagement to his followers on Twitter, Facebook and LinkedIn. From the analysis, Engineer Makinde engaged his followers more on job provision, adequate funding of education and improved living standard of people of Oyo State. Other areas he promised his administration would keenly look into should he is voted in as the governor include sustainable use of resources, affordable health care, infrastructure such as roads, electricity and water, agriculture as well as inclusive government.

For instance, he promised to create massive employment through agriculture and waste management. He believed that growing cash crops like cocoa, cotton, groundnut and oil palm as well as cultivating food crops like yam, cassava, millet, vegetables and sorghum in Oyo State would go a long way to improve the living standard of his people and ensure food security in the state. According to him, it would also reduce the rural-urban migration of the populace. To improve the living standard of his people, the aspirant also promised to eliminate multiple taxation, create direct and indirect investments and formulate business-friendly policies. On education across board, Engineer Makinde's interventions would be to commit 10% of the yearly budget to funding education and to initiate the possibility of outright ownership of LAUTECH Ogbomoso so that Oyo State can be directly responsible for its management. According to him, his administration would also provide optimal learning environments such as well-furnished classrooms for all state primary and secondary schools and better working conditions for teaching and non-teaching staff of the schools. Engineer Makinde also promised the potential voters that his administration would upgrade the rural feeder roads in all the 33 LGAs, invest in housing, energy and water supply, empower youths, upgrade primary healthcare centres (PHCs) and implement a feasible health insurance scheme, among others.

From the foregoing, it could be deduced that he used social media platforms based on the caliber of people to be engaged on them. For instance, he used more of LinkedIn to discuss agriculture, but Facebook and Twitter to talk about inclusive government. Engineer Makinde as well used more of Twitter to discuss his plans and strategies on infrastructural development, affordable health care and provision of jobs. It could be inferred that Engineer Makinde's engagement is based on the nature of the social media and the demographics the platforms engaged most. In summary, Engineer Seyi Makinde of the PDP used the three social media for his direction of engagement to his online followers.

Table 1

Extent of Using Social Media by the Candidates and their Followers for Mobilization

Candidate and the Medium	Mean	T	Df	P-Value
Adelabu on Twitter	3.00	.000	5	1.000
Makinde on Twitter	**8.50**	**4.116**	**7**	**.004**
Adelabu on Facebook	4.83	1.534	5	.186
Makinde on Facebook	**8.13**	**4.068**	**7**	**.005**
Adelabu on LinkedIn	.00	.000	0	.000
Makinde on LinkedIn	**7.38**	**3.123**	**7**	**.017**

Source: Researchers' Analysis (2019)

It is worthy of note that the insights from the direction of engagement of the two politicians is a reflection of the fact that politicians, having understood the potency of social media, use them to connect their agenda/programmes with the people (Stieglitz & Dang-Xuan, 2013; Larsson, 2015; Udoka, 2015; Haleva-Amir, 2016; David, Zhitomirsky-Geffet, Koppel and Uzan, 2016; Steinfeld, 2016; Okeke, Chinonye & Obi, 2016; Apuke & Tunca, 2018 and Verjee, Kwaja, and Onubogu, 2018). In fact, there is evidence from the literature that politicians are now adopting social media for campaigns because the platforms are capable of mobilizing potential voters and encouraging political participation (Okolo, Ikechukwu, Gerald & Chinedum, 2017; Dunu, 2018; Dike, 2018; Apuke & Tunca, 2018; Orjimi, 2018). These connections were observed in the online engagement of Mr Bayo Adelabu and Engineer Seyi Makinde with netizens from December 2018 to February 2019, though Engineer Makinde had a better connection with his followers across the three social media platforms compared to his rival who made use of just only two- Facebook and Twitter. The social media usage of these politicians also affirmed that political candidates and potential voters disseminate information and provide feedback to one another. This is as captured in one of the propositions of the Information Society Theory. In this context, the politicians posted their campaign promises to the potential voters while the potential voters equally commented on the posts in the form of feedbacks.

The pattern of the Candidates' Citizen Mobilization on Facebook, Twitter and LinkedIn

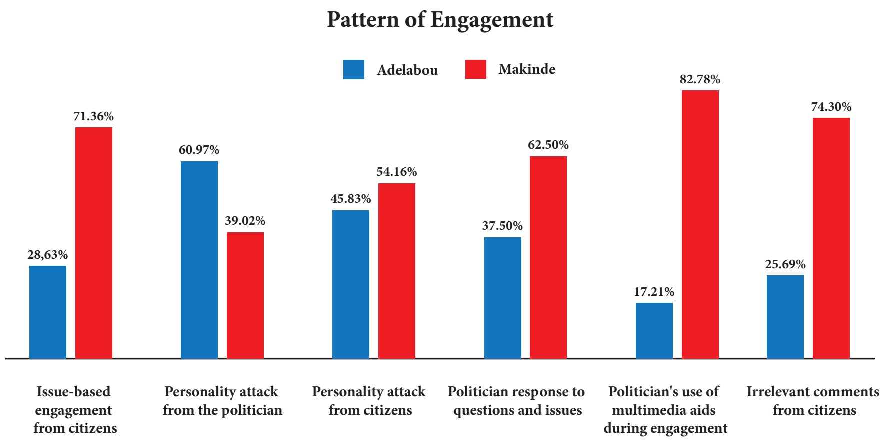
On the pattern of mobilization employed by the two candidates for the citizens, analysis of the results revealed that there was some engagement between the candidates and their followers on Facebook, Twitter and LinkedIn. From the researchers' observations, the mobilization strategies witnessed some issue-based interaction, personality attack from citizens and politicians, politicians' use of multimedia and some irrelevant comments from the citizens to raised issues (See Figure 3).

During the period, there were comments on job provision, adequate funding of education, improved living standard, infrastructural development and improved health care. The posts of the two candidates attracted a number of comments from their followers. For instance, within the period of the study (December 2018 to February 2019), Mr Adelabu's followers on Facebook and Twitter engaged him with not less than four hundred and fifty-five comments while Engineer Makinde's followers on Facebook, Twitter and LinkedIn engaged him on his campaign promises with one thousand one hundred and thirty-four comments. It was observed that from Mr

Adelabu's posts, there was no personality attack. But his rival, Engineer Makinde, had some posts that attacked the incumbent governor, his rival and the party platform. As expected, this erupted into an e-war of words by their followers as they engaged one another in name-calling.

Figure 3

The Patterns of Citizens' Mobilization by Mr Bayo Adelabu and Engineer Seyi Makinde on Facebook, LinkedIn and Twitter



Source: Researchers' Analysis (2019)

Using social media to de-market rival candidates and parties has been found out to be one of the features of the use of social media, especially Twitter and Facebook. Specifically, Apuke and Tunca (2018) maintain that politicians used the social media to de-market or destroy the image of their opposition party's standard-bearer alongside his political party in the buildup to the 2011 and 2015 general elections in Nigeria.

Despite a noticeable level of social media engagement observed, the two politicians failed to adopt a two-way communication model. While their own posts attracted comments from the people generally, they did not respond to many questions raised by netizens. This may be an indication of their intention to only communicate and increase followership online without a corresponding will to entertain pertinent questions from the built followership. For the entire period of the study, the two candidates responded to eight questions in all. Engineer Makinde responded to five questions while Mr Adelabu responded to only three questions. Furthermore, the deployment of short videos, complementary pictures, infographics and other multimedia materials by both politicians to complement their messages could be said to be an indicator of the politicians' perception of the online media as a one-way communication platform. They failed to make use of the interactive nature of the social media platforms.

Figure 4

Selected Campaign Materials of Mr. Adebayo Adelabu and Engr. Seyi Makinde

Source: Facebook and Twitter, 2019

The Extent of the followers keying into issues of the campaign

From the analysis, the extent of the followers keying into the campaign issues of the two candidates was not impressive. There is a myriad of comments that do not correlate with issues raised by the politicians. For example, irrelevant comments from the followers of the two candidates rose to one thousand four hundred and nine (44.1%). The irrelevant comments mined from Mr Adelabu's posts across Facebook and Twitter amounted to 41.3% while those of Engineer Seyi Makinde on Facebook, Twitter and LinkedIn produced 45.2%. Some of these irrelevant user-generated contents directly sought financial assistance from the candidates. These followers went to the extent of adding their account details to the body of their messages. Some other comments advertised the potency of some locally made drugs and how to get accommodation in certain areas in Lagos while some advertised the wonders of certain football betting companies. In fact, some followers had to advertise the businesses they do with a view to selling their services to the two candidates. In addition, some comments from the adherents of Islam and Christianity showed indifference; as such, they only prayed for the two candidates. All these comments were coded irrelevant because they did not literally and thematically correspond with the issues the politicians discussed. This indicates that only 58.7% and 54.8% of the social media followers of Mr Adelabu and Engiineer Makinde respectively keyed into the issues of their campaign. Thus, the rates of those whose comments contradicted the themes of the online engagement show a direct link with Ezeibe's (2015) findings that social media users did not focus on campaign issues in the 2015 general elections in Nigeria. The implication of this finding is that social media, especially Facebook, encourages self-expression and user-generated contents among the users (Jibril & Yakubu, 2017; Michael, 2015), and as such, they are at liberty to express themselves without being cautioned by any primary gatekeeper. Interestingly, most of these irrelevant comments were aggregated from Facebook posts of the two candidates (888 comments, amounting to 63% of the 1409 comments).

Therefore, putting everything together, it can be concluded that Engineer Seyi Makinde of the People's Democratic Party (PDP) engaged his followers on Facebook, Twitter and LinkedIn more than Mr Bayo Adelabu of the All Progressives Congress (APC), perhaps testifying to the assertion of Dike (2018) that "it would be disastrous for politicians not to fully embrace this important information platform (social media) as "election battles are going to be on social media and less at the big rally fronts". Similarly, the study of Effing, Hillegersberg and Huibers (2011) reveals that Twitter contributed to how the people of Netherlands voted for a particular candidate in her 2010 national elections. According to them, the candidate who explored Twitter for political campaigns and mobilisation received more votes offline. Apuke and Apollos (2017), as well as Barlett, Krasodomski-Jones, Daniel, Fisher and Jesperson (2018) share the same argument when they revealed their findings on the impact of social media in the 2015 general elections in Nigeria. In fact, Kamp (2016) argues that social media provide opportunities for political leaders to strengthen their interaction with the citizens. However, the European Union's report (2018) argues that despite the increased adoption of social media, there has not been a generally agreed position on the influence social media has on Nigerian elections. Thus, the extensive use of Facebook, Twitter and LinkedIn by Engineer Seyi Makinde might be one of the salient factors that contributed to his victory in the gubernatorial election.

CONCLUSION

From our findings, it is established that social media engagement plays a significant role in the outcome of elections. Engineer Seyi Makinde had a more robust engagement with his followers on Facebook, Twitter and LinkedIn than Mr Bayo Adelabu did. He only used Twitter and Facebook for citizen engagement. Throughout the campaign periods, both of them engaged their followers on issue-based campaigns, but Engineer Makinde's engagement became more prominent in February when he dished out more problem-solution based messages.

Also, our findings indicate that Engineer Makinde engaged in personality attack. He attacked the personality of his rival, Mr Bayo Adelabu, and the then incumbent Governor Abiola Ajimobi who shared the same party platform with the APC candidate. Personality attack was missing from Mr Adelabu's posts within the study period. It was also observed that the social media platforms employed were used as more of a one-way communication channel. Responses on posts from the politicians were off the tangent sometimes being ridiculously irrelevant. Responses, observations and questions from the followers were equally ignored by the politicians. There is a failure to leverage the interactive nature of the social media platforms. The communicative dialogues as propounded by the Information Society Theory did not reflect in the online interaction of the two candidates considered.

RECOMMENDATIONS

Based on our findings, we recommend that media strategists of Nigerian politicians should always make their engagement with the citizens two-way symmetrical. That is, they should develop a strategy to always respond to salient questions and observations the followers of their principals raise on political discussions. Politicians should never downplay the significance of Twitter, Facebook and LinkedIn as they engage citizens on issue-based discussions during political campaigns. In using these media, there should be a convergence where similar issues would be discussed simultaneously on the social media platforms. Emphasis should also be placed on generating conversations on real campaign issues. The social media platform should not be seen as a dumping ground to show off attendance at their offline rallies. Future researches on online/social media communication behaviour of Nigerian political candidates should examine post-election social media engagement of the eventual winners to find out whether they stop interacting with their followers on the cyber-space or they continue to engage them with the pre-election campaign promises they rolled out on social media. This, it is believed, would establish more insights into the political behaviour of Nigerian politicians online.

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O Jornalismo Ficcional da Franquia Transmedia de Harry Potter[1]

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Resumo

O jornalismo é parte intrínseca da franquia transmedia Harry Potter em suas múltiplas plataformas, pois as narrativas de ficção precisam de meios de comunicação próprios dos seus universos para explicar a sua lógica, suas práticas e suas instituições (Jenkins, 2009b). Este artigo busca olhar, a partir de números concretos, como este jornalismo se constrói dentro da narrativa de Rowling. Por meio da análise de conteúdo (Bardin, 2006), categorizamos as aparições do jornalismo nos sete livros, os oito filmes e a história interativa e a seção *Daily Prophet* do antigo site *Pottermore*. Através dos dados gerados por esta categorização, buscamos pensar o que estes números indicam quanto a integração do jornalismo na história de Harry Potter transmedia, assinalando a presença inerente da profissão e dos jornalistas no universo de Rowling. Entende-se que o jornalismo se estabelece como um elemento articulador da narrativa, que integra lógicas de composição e mimetiza parte dos processos da profissão. O jornalismo se torna uma forma de entrar na *realidade* do *mundo mágico* – a função mediadora da profissão é trazida para a ficção como uma forma de acesso ao universo transmedia de Harry Potter.

Palavras-chave: Harry Potter, transmedia, jornalismo, jornalistas.

The Fictional Journalism of the Transmedia Harry Potter Franchise

Abstract

Journalism is an intrinsic part of the transmedia Harry Potter franchise in its multiple platforms, because fictional narratives need media inherent to their own universes to explain their logic, their practices and their institutions (Jenkins, 2009b). This article seeks to look, using concrete data, how journalism is constructed in inside Rowling's narrative. Through content analysis (Bardin, 2006), we categorized the apparitions of journalism

1 Este artigo apresenta resultados secundários da dissertação de mestrado "As representações do jornalismo na ficção de Harry Potter transmídia: a função social e o ethos profissional" apresentada como requisito para obtenção do grau de mestre em Comunicação e Informação pelo Programa de Pós-graduação em Comunicação e Informação da Universidade Federal do Rio Grande do Sul em 09/12/2015.

in the seven books, the eight movies and the interactive story and the Daily Prophet section of the old *Pottermore* site. Using the data obtained by this categorization, we intend to think about what this numbers indicate about the integration of journalism in the transmedia Harry Potter narrative, pointing out the intrinsic presence of the profession and of journalists in Rowling's magical universe. We understand that the journalism created in the story establishes itself as an articulating element of the narrative, that integrates the composition logics and mimics part of the processes of the profession. The journalism becomes a way of entering the *reality* of *the magical world* – the mediator function of the profession is brought to fiction as way to access Harry Potter's transmedia universe.

Keywords: Harry Potter, transmedia, journalism, journalists.

1. INTRODUÇÃO

Os produtos culturais são um espaço de reflexão sobre o campo jornalístico: representam a cultura falando em voz alta sobre ela mesma. A literatura, o cinema e a televisão proporcionam visões de como o jornalismo poderia e até deveria ser. Suas representações culturais trazem questões proeminentes do âmbito social, assim como frequentemente agem como uma forma de intertextualidade crítica que fornece comentários e convida a pensar sobre outros meios de comunicação, instituições e textos (Gray, 2006).

Entender as imagens do jornalista que circulam nos produtos culturais ao longo da história oferece uma maneira única de avaliar a relação do público com o jornalismo ao longo dos séculos (Ehrlich, 2004; Saltzman, 2005). Para o público, não importa se estas representações correspondem a circunstâncias ou fatos, à medida que se tornam elementos de apreensão do real no imaginário que cerca a profissão. Poucas pessoas já testemunharam um jornalista em ação; raramente se visita os escritórios de um jornal ou revista, se conhece um ambiente de redação e se acompanha em primeira mão o processo do fazer jornalístico. No entanto, o público tende a ter uma ideia específica do que é um jornalista e o que ele faz, porque leu sobre jornalistas em romances e histórias em quadrinhos, os viu em atividade em filmes, programas de TV, peças e desenhos animados (Ehrlich, 2004; Saltzman, 2005).

Para pensar a profissão na realidade, as pessoas têm como referência os jornalistas criados para a ficção e os modos que estes lidam com questões éticas da profissão – tem-se o jornalismo da ficção como parâmetro para avaliar e criticar as práticas jornalística reais (Samoy, 2015). As obras sobre a profissão representam uma ruminação de longa data sobre as conquistas e fracassos do jornalismo, nossas expectativas e nossas apreensões sobre ele (Erlich, 2009).

J.K. Rowling, autora da série Harry Potter, recriou em seu universo ficcional, hoje distribuído em múltiplas plataformas, meios de comunicação existentes na realidade, como a televisão, o rádio, o jornal e a revista, assim como personagens que incorporam a função de jornalistas. Formou-se um espaço de reflexão sobre o jornalismo, que traz não apenas críticas quanto à profissão, mas também possibilita um olhar sobre os conflitos e as tensões que são parte da cultura jornalística.

Harry Potter é uma narrativa que traz imagens e representações do dia a dia das pessoas, que as observam e as absorvem como forma de pensarem aquilo que está presente em suas vidas. A saga de um menino bruxo que vive entre dois mundos – um *trouxa*[2] e um mágico –, enfrentando os desafios de crescer e criar sua própria identidade, em meio a relações, grupos e compromissos, que desenham um cotidiano *real* em um universo ficcional, torna-se também uma representação cultural do campo jornalístico.

A história de Harry Potter foi lançada em um período contemporâneo a significativas transformações nos meios de comunicação em processos de convergência, que envolvem diferentes esferas – editorial, comercial, institucional, tecnológica, etc. e, a partir do livro impresso como suporte midiático, estratégias de migração digital também foram sendo incorporadas na medida em que o mercado de media e de entretenimento se alterava, associando novos recursos e estratégias. Nesse sentido, a narrativa ganhou mais espaço, transformou o seu registo de temporalidade e passou a circular em proporções cada vez mais globalizadas.

Harry Potter continua a ser marcado como um produto cultural de enorme sucesso nos mercados editorial, cinematográfico e de entretenimento, que atingiu um número expressivo de leitores, espectadores, utilizadores e consumidores em diferentes países. Entre o lançamento do primeiro livro da série até a estreia de seu último filme nos cinemas passaram-se quinze anos, nos quais os fãs se mobilizaram na expectativa dos lançamentos de cada novo produto. Com o anúncio da criação do *site Pottermore*, em 2011, mesmo ano em que a última obra cinematográfica estreava, Rowling garantia aos fãs uma nova forma de vivenciar a história. O *site* marcou a série como

2 Tradução das edições brasileiras para o termo que Rowling utiliza em sua história para se referir às pessoas não mágicas. Em inglês, o termo usado é *muggle*. Em ambas as línguas, há uma conotação interessante. Mais do que definição, há a indicação de que o mundo sem magia – desconectado, racional – é marcado por algo que nos escapa. Há uma realidade paralela desconhecida, que os *trouxas* não conseguem apreender.

uma narrativa transmedia, com novos conteúdos e novas perspectivas para o enredo, e assinalou uma nova tendência para os produtos culturais do século XXI – a busca pela transmidialidade das narrativas.

Entendemos, assim, que temos em Harry Potter uma narrativa transmedia, definida por Jenkins (2009a) como uma nova forma de se contar histórias: uma maneira de interpretação da realidade na qual cada pessoa pode escolher de que forma quer entrar no enredo e o quanto quer se integrar nele. O mundo de Rowling se tornou um extenso universo ficcional que se desenvolveu através de inúmeros suportes midiáticos, com cada novo texto contribuindo de forma diferente e relevante para o todo. Em cada suporte é possível entrar em uma nova camada da história e descobrir outros lados da vida de Harry Potter, inclusive inserindo-se no enredo.

A série de *best-sellers* estreou em 1997 com *Harry Potter e a Pedra Filosofal* (*Harry Potter and the Sorcerer's Stone*). Nos anos seguintes, foram lançados outros seis livros da série, traduzidos para 78[3] idiomas, publicados e reeditados em diversos países. O que começou como literatura transformou-se em outras linguagens que possibilitam, de algum modo, uma integração à história: oito filmes que se tornaram campeões de bilheteria, jogos de *videogame* e para computador, histórias em quadrinhos, brinquedos, roupas e até doces. Além disto, hoje é possível visitar um parque temático chamado *The Wizarding World of Harry Potter*, nos Estados Unidos, que conta com atrações baseadas no enredo; ou conhecer os cenários dos filmes, interagir com objetos, conhecer animais-atores, entre outras atividades proporcionadas pelo estúdio da Warner Bros próximo a Londres.

Em outubro de 2011, com o lançamento do *site Pottermore.com*, foi proporcionado aos fás um espaço de vivência *online* do mundo de Harry Potter. Rowling escreveu novos materiais sobre os personagens, lugares e objetos das histórias, que podem ser acessados nas diversas seções da página. Em setembro de 2015, o *site* ganhou uma nova versão e a anterior foi tirada do ar, juntamente com todo o seu conteúdo. A antiga versão do *site* disponibilizava uma história dos sete livros escritos pela autora recontada de forma interativa, a partir de textos, áudios, ilustrações, jogos e animações, assim como a uma seção denominada *Daily Prophet*, que continha trechos exclusivos escritos por Rowling em formato de notícias produzidas por personagens conhecidos dos fãs da série – Ginny Potter e Rita Skeeter. Com a repaginação do *Pottermore*, estes conteúdos não existem mais. A possibilidade de o conteúdo digital, contudo, poder

3 Fonte: <http://entertainment.time.com/2013/07/31/because-its-his-birthday-harry-potter-by-the-numbers/> Acedido em: 15 set. 2019.

ser compartilhado, copiado e enviado (Chun, 2008) permitiu que estudássemos a antiga versão do *site* em sua integridade – a história interativa e a seção *Profeta Diário* de seu início ao fim.

O jornalismo se tornou uma parte intrínseca desta história de Harry Potter em suas múltiplas plataformas, pois as narrativas de ficção precisam de meios de comunicação próprios dos seus universos para explicar a sua lógica, suas práticas e suas instituições (Jenkins, 2009b). Este artigo busca olhar, a partir de números concretos, como este jornalismo se constrói dentro da narrativa de Rowling. Por meio da análise de conteúdo (Bardin, 2006), categorizamos as aparições do jornalismo nos sete livros, os oito filmes e a história interativa e a seção *Daily Prophet* do antigo site *Pottermore*. Através dos dados gerados por esta categorização, procuramos pensar o que estes números indicam quanto a integração do jornalismo na história de Harry Potter transmedia, assinalando a presença inerente da profissão e dos jornalistas no universo de Rowling.

2. PROCEDIMENTOS METODOLÓGICOS: PORQUE OS NÚMEROS SÃO COMO SÃO

Ao pensar em Harry Potter transmedia, nos interessa a narrativa constituída no conjunto do *corpus* – os sete livros, os oito filmes, a história interativa e a seção *Daily Prophet* do antigo *Pottermore* – e não ligada a cada meio singularmente. Por meio da análise de conteúdo, levantamos dados junto à história transmedia, a partir deste *corpus* de pesquisa determinado a partir de três regras estabelecidas por Bardin (2006). A primeira diz respeito à *representatividade*, que considera a necessidade de a amostra representar o universo do objeto pesquisado. A segunda trata da *homogeneidade*, que determina que os documentos obtidos devam ser da mesma natureza, gênero ou assunto. A terceira considera a *pertinência*, que exige a adequação dos documentos analisados aos objetivos da pesquisa.

O *corpus* da pesquisa foi composto pelos sete livros, os oito filmes, a seção *Daily Prophet* e a história interativa disponíveis até setembro de 2015 no *site Pottermore* (Tabelas 1 a 3), pois consideramos que, ao realizar a pesquisa em três plataformas diferentes, conseguimos considerar a constituição da história transmedia de Harry Potter, permitindo uma visão abrangente do jornalismo representado por Rowling, que se complementa em cada um dos meios. Estes foram escolhidos por serem os principais meios de divulgação e de entrada para a história, disponíveis no mundo todo para uma grande parcela do público, permitindo uma percepção completa da construção da profissão feita por Rowling.

Tabela 1
Livros Componentes do Corpus de Pesquisa

Título do Livro		Editora	Ano	
Original	**Em português**	**Edição utilizada**	**Lançamento**	**Edição utilizada**
Harry Potter and the Sorcerer's Stone[4]	Harry Potter e a Pedra Filosofal	Schoolastic	1997	1998
Harry Potter and the Chamber of Secrets	Harry Potter e a Câmara Secreta	Bloomsbury	1998	2004
Harry Potter and the Prisoner of Azkaban	Harry Potter e o Prisioneiro de Azkaban	Bloomsbury	1999	2000
Harry Potter and the Goblet of Fire	Harry Potter e o Cálice de Fogo	Bloomsbury	2000	2001
Harry Potter and the Order of the Phoenix	Harry Potter e a Ordem da Fênix	Schoolastic	2003	2003
Harry Potter and the Half-Blood Prince	Harry Potter e o Enigma do Príncipe[5]	Schoolastic	2005	2005
Harry Potter and the Deathly Hallows	Harry Potter e as Relíquias da Morte	Bloombury	2007	2007

4 Também publicado em inglês como Harry Potter and the Philosopher's Stone.
5 Também publicado em português como *Harry Potter e o Príncipe Mestiço*.

Tabela 2

Filmes Componentes do Corpus de Pesquisa

Título do Filme		Diretor	Estúdio	Ano De Lançamento
Original	**Em português**			
Harry Potter and the Sorcerer's Stone[6]	Harry Potter e a Pedra Filosofal	Chris Colombus	Warner Bros	2001
Harry Potter and the Chamber of Secrets	Harry Potter e a Câmara Secreta	Chris Colombus	Warner Bros	2002
Harry Potter and the Prisoner of Azkaban	Harry Potter e o Prisioneiro de Azkaban	Alfonso Cuarón	Warner Bros	2004
Harry Potter and the Goblet of Fire	Harry Potter e o Cálice de Fogo	Mike Newell	Warner Bros	2005
Harry Potter and the Order of the Phoenix	Harry Potter e a Ordem da Fênix	David Yates	Warner Bros	2007
Harry Potter and the Half-Blood Prince	Harry Potter e o Enigma do Príncipe[7]	David Yates	Warner Bros	2009
Harry Potter and the Deathly Hallows – Part I	Harry Potter e as Relíquias da Morte – Parte I	David Yates	Warner Bros	2010
Harry Potter and the Deathly Hallows– Part II	Harry Potter e as Relíquias da Morte – Parte II	David Yates	Warner Bros	2011

6 Também lançado em inglês como Harry Potter and the Philosopher's Stone.

7 Também lançado em português como *Harry Potter e o Príncipe Mestiço*.

Tabela 3
Site Componente do Corpus de Pesquisa

Site	Endereço	Ano	
		Lançamento	Consulta
Pottermore	<https://www.*Pottermore*.com/en-us/>	2011	2015[8]

A análise de conteúdo foi escolhida como método, pois permite a descrição sistemática do *corpus* para a posterior análise e proposição de inferências em relação ao objeto e seu contexto social e cultural. Pode-se pensar a análise de conteúdo como uma técnica investigativa que, por meio de descrições objetivas, sistemáticas e quantitativas do conteúdo exposto, permite interpretar formas de comunicação.

Ela se organiza em três fases cronológicas. A *pré-análise* constitui a escolha de documentos, a formulação de hipóteses e objetivos, e a elaboração de indicadores que fundamentam a interpretação final. A *exploração do material* é a análise propriamente dita, enquanto o *tratamento dos resultados obtidos e interpretação* é o tratamento dos resultados brutos de forma que se tornem significativos e válidos por meio de operações estatísticas – quando necessário – que o analista pode utilizar para propor inferências (Bardin, 2006).

Por meio da análise de conteúdo, na fase da *pré-análise*, elaboramos – com base em nossos objetivos, no quadro teórico e na avaliação flutuante de alguns livros e filmes –, um instrumento para o levantamento de dados de ordem quantitativa que nos fornecessem indicadores para a avaliação qualitativa, que é nosso foco. Ele foi então aplicado a um livro, a um filme e ao *site* para podermos fazer os ajustes necessários, gerando assim o instrumento final (Tabela 4). O instrumento final, utilizado para a etapa de *exploração do material*, foi aplicado aos sete livros, aos oito filmes e à história interativa da antiga versão do *Pottermore*.

8 Em 22 de setembro de 2015 foi lançada uma nova versão do *site Pottermore*. Para o propósito deste trabalho, enquanto se problematizou a atualização do *site* e seu novo formato, para a análise da representação do jornalismo será utilizada a versão anterior do *site*, disponível na internet até o dia 21 de setembro de 2015.

Tabela 4

Instrumento para Levantamento de Dados – Análise de Conteúdo

Meio de Comunicação			
Jornal	**Veículo**	***trouxa***	*Daily Mail*
			Sem menção do nome
		bruxo	*Profeta Diário*
			Sem menção do nome
	Modalidade de apresentação	Com notícia destacada	
		Na fala de personagem	
		Na descrição do ambiente/cenário	
		Pensamento Harry Potter	
		Ação do personagem	
		Caracterização do jornalista	
		Descrição inicial da cena	
		Texto a ser explorado	
Revista	**Veículo**	***trouxa***	Sem menção do nome
		bruxo	*O Pasquim*
			Challenges in Charming
			Witch Weekly
			Transfiguration Today
			The Practical Potioneer
			Which Broomstick
			Sem menção de nome
	Modalidade de apresentação	Com notícia destacada	
		Na fala de personagem	
		Na descrição do ambiente/cenário	
		Pensamento Harry Potter	
		Ação do personagem	
		Caracterização do jornalista	
		Elemento a ser coletado	
Rádio	**Veículo**	***trouxa***	*FM Dial*
			Sem menção do nome
		bruxo	WWN | *Wizarding Wireless Network*
			Potterwatch
			Sem menção do nome
	Programa	***trouxa***	Sem menção do nome
		bruxo	*Witching Hour*
			WWN News
			Christmas Broadcast
			Sem menção de nome

Meio de Comunicação			
Televisão	**Veículo**	***trouxa***	Sem menção do nome
	Programa	***trouxa***	*News at Ten*
			Sem menção de nome
Notícias			
Fontes	Presentes		
	Não presentes		
Modalidade de apresentação	Na íntegra		
	Na fala de personagens		
Jornalistas			
Modalidade de apresentação	Papel ativo na narrativa		
	Na fala de personagem		
	Presente no ambiente/cenário		
	Dentro da notícia		
	Pensamento Harry Potter		
	Descrição inicial da cena		
	Texto a ser explorado		
Profissionais	***trouxa***	Jim McGuffin	
		Mary Dorkins	
		Ted	
		Sem menção do nome	
	bruxo	Rita Skeeter	
		Ginny	
		Xenophilius Lovegood	
		Barnabas Cuffe	
		Bozo	
		Sem menção do nome	
Outras manifestações do jornalismo			
Aparição ocasional	No mundo bruxo		
	No mundo *trouxa*		
Referência ao	Impresso		
	Televisão		
	Rádio		

As aparições do jornalismo em Harry Potter foram catalogadas na totalidade do *corpus* (afora a seção *Daily Prophet* do *site Pottermore*, cujo conteúdo não versa diretamente sobre a narrativa), considerando todas as menções de meios de comunicação; todos os personagens que assumiram papéis ligados ao jornalismo; a fala de personagens sobre notícias, jornalistas ou veículos jornalísticos; e notícias escritas por Rowling como parte da história. Para avaliarmos a presença do jornal, da revista e do rádio no *corpus*, observamos a presença dos veículos *trouxas* e bruxos apresentados ao longo da narrativa, considerando para o rádio também a indicação de programas. A televisão é um meio exclusivamente *trouxa*, mas foi avaliado também considerando a aparição de veículos e programas. Para os quatro meios foram considerados todos os veículos e programas ao longo da narrativa, tanto os nomeados como os que apareceram sem nomeação.

No caso do jornal e da revista, foram consideradas as modalidades de apresentação de seus veículos na história, na medida em que o jornalismo impresso representa de forma majoritária a profissão ao longo da narrativa. Essas modalidades de apresentação referem-se aos diferentes modos como os veículos são inseridos na história, considerando as particularidades de cada meio avaliado – livro, filme e história interativa no *site Pottermore*.

Há seis categorias comuns ao **jornal** e à **revista**: a) com **notícia destacada** – quando a notícia é enfatizada no enredo, tornando-se parte central do acontecimento vivenciado pelos personagens, podendo ser percebida com clareza pelo sujeito acompanhando a história; b) na **fala de personagem** – quando o veículo é mencionado, debatido ou tópico de conversação dos personagens; c) na **descrição do ambiente/cenário** – quando o veículo é um elemento compositivo da história, não aparecendo de forma central na cena, ou mesmo tendo interação com algum personagem, mas estando presente, sendo indicado como parte da rotina; d) no **pensamento de Harry Potter** – quando a história de Rowling é contada a partir do ponto de vista de Harry, há momentos em que sua memória e sua imaginação sobre os veículos se tornam centrais no enredo; e) na **ação do personagem** – indica a interação do personagem com o meio, quando sua atitude junto ao meio (como entregá-lo ou mostrá-lo para alguém) se torna central no enredo; e f) na **caracterização do jornalista** – quando o veículo é utilizado para contextualizar quem é o jornalista tanto para o personagem, quanto para o sujeito que acompanha a história.

Duas categorias são específicas do **jornal** e implicam sua aparição na história interativa do *site Pottermore*. A primeira diz respeito à **descrição inicial da cena**, quando o veículo é mencionado em um texto com o propósito de explicar o momento a ser explorado pelo utilizador do *site*, e o segundo trata do **texto a ser explorado**, quando o meio é mencionado em um texto que pode ser clicado e explorado em determinadas cenas. Uma categoria é específica da **revista** e também diz respeito a sua presença na história interativa do *Pottermore*, que se refere ao **elemento a ser coletado**, quando o utilizador pode clicar em um objeto, explorá-lo e coletá-lo para sua coleção pessoal.

Para investigarmos a presença dos **jornalistas** no *corpus*, consideramos tanto a realidade *trouxa*, quanto a bruxa, englobando todos os profissionais, nomeados ou sem nome mencionado, ao longo do enredo. O jornalista aparece na narrativa dentro de sete modalidades de apresentação: a) quando tem um **papel ativo na narrativa**, sendo um personagem central no enredo, tendo destaque por meio de suas ações; b) na **fala de personagem**, quando é mencionado ou se torna o tópico de conversação; c) **presente no ambiente/cenário**, ao aparecer no pano de fundo da narrativa, estando presente em um acontecimento, mas não tendo nenhuma ação pertinente à história; d) **dentro da notícia**, quando é mencionado nas notícias apresentadas na íntegra ao longo do enredo; e) no **pensamento de Harry Potter**, quando a história de Rowling é contada a partir do ponto de vista de Harry, há momentos em que sua memória e sua imaginação sobre o jornalista se tornam centrais no enredo; f) no **texto a ser explorado**, quando o jornalista é mencionado em um texto que pode ser clicado e explorado em determinadas cenas; e g) na **descrição inicial da cena**, quando o jornalista é mencionado em um texto com o propósito de explicar o momento a ser explorado pelo utilizador do *site*.

Para avaliarmos as **notícias** apresentadas no *corpus*, consideramos primeiramente sua modalidade de apresentação, se foram apresentadas **na íntegra** ao longo do enredo – uma transcrição do seu texto ou uma imagem do jornal com a notícia em destaque, ou se foram apresentadas através da **fala de um personagem**, que leu partes do texto da notícia. Foi observado também no âmbito das notícias, em sua redação, se havia ou não a presença de **fontes**.

De forma a catalogar todas as aparições relacionadas ao jornalismo no *corpus*, criou-se uma categoria que diz respeito a **outras manifestações da profissão**, que ocorre através da fala de personagens, que, enquanto podem ser relacionadas ao jornalismo, não dizem respeito aos seus veículos, notícias ou profissionais. Tal presença de falas relacionadas ao jornalismo foi denominada de aparições ocasionais e ocorreram tanto no mundo bruxo, quanto no *trouxa*. Foi avaliado também a que meio as falas fazem referência: ao impresso, à televisão ou ao rádio.

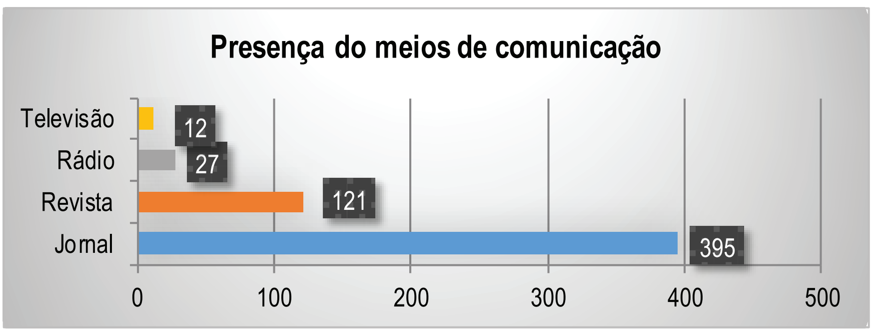
Deve-se notar que no caso dos filmes e da história interativa no *Pottermore*, têm-se características próprias que devem ser observadas na constituição do jornalismo e dos jornalistas. Por serem constituídos por imagens, o cenário, o figurino dos personagens e o projeto gráfico dos veículos presentes nas cenas devem também ser considerados para compreendermos o panorama do jornalismo na franquia. Elementos como esses são avaliados apenas qualitativamente.

3. O JORNALISMO DE HARRY POTTER EM NÚMEROS

Ancorada na televisão, no rádio, no jornal impresso e na revista (Figura 1), Rowling inseriu o jornalismo na série Harry Potter, dando aos personagens e às instituições diferentes níveis de importância ao longo do enredo. A profissão criada na narrativa mostra-se capaz de influenciar diversas relações que se formam na história e torna-se essencial para o desenvolvimento de uma sociedade – tanto bruxa, quanto *trouxa*.

Figura 1

Presença dos Meios de Comunicação na Totalidade do Corpus



Em Harry Potter, os meios de comunicação são divididos entre os veículos *trouxas* e os bruxos. Ambos apresentam o mesmo formato de jornalismo, tendo como forma de diferenciação os recursos a que cada *sociedade* tem acesso – enquanto os bruxos têm a magia, os *trouxas* têm a tecnologia. Os veículos pertencentes à comunidade mágica têm um papel mais relevante para o desenrolar da história. De 555 aparições dos meios de comunicação entre história interativa, filmes e livros, 504 (91%) são bruxos e 51 (9%) são *trouxas*.

O jornal impresso tem o número de aparições mais expressivo – 395 (71%) de 555, sendo 370 da comunidade bruxa e 25 da *trouxa* (Figura 2). A revista tem 121 de 555, sendo 100 aparições relacionadas ao mundo bruxo e apenas 21 ao mundo *trouxa* (Figura 3). O rádio e a televisão têm os números mais inexpressivos. O rádio aparece 27 vezes no *corpus,* 22 vezes na sociedade bruxa e 5 na *trouxa* (Figura 4). A televisão aparece apenas no meio *trouxa*, com 12 aparições. Isso pode ser explicado pela constituição do enredo, que se passa, sobretudo, nos ambientes da sociedade mágica. Os meios de comunicação dos *trouxas* servem para criar ligações entre as duas realidades, mesmo que estas passem despercebidas pelos personagens. A intersecção entre o mundo dos bruxos e dos *trouxas* por meio da media pode ser observada desde o início da série.

Figura 2
Presença do Jornal nas Sociedades Bruxa e Trouxa

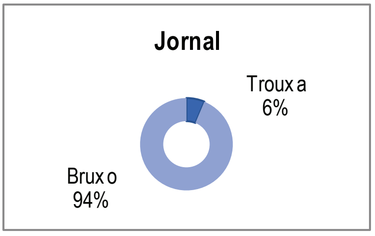


Figura 3
Presença da Revista nas Sociedades Bruxa e Trouxa

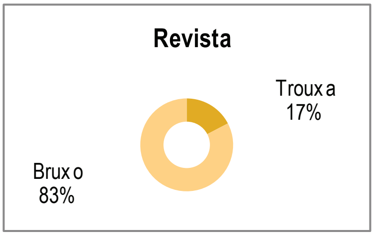
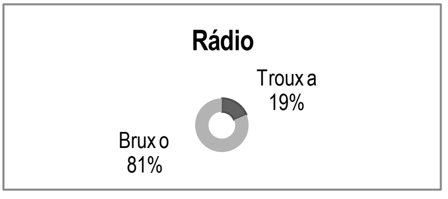


Figura 4
Presença do Rádio nas Sociedades Bruxa e Trouxa



Deve-se observar que há predominância da media impressa – jornais e revistas. Isso pode ser explicado pelo fato de que, no contexto da sociedade mágica, no qual se passa a maior parte da história, não há necessidade de tecnologia. A comunidade bruxa não tem televisões, e os rádios, mesmo aparecendo entre os bruxos, não é um meio com o qual todos tenham familiaridade.

Os bruxos evitariam os dispositivos[9] trouxas por uma questão cultural. A comunidade mágica orgulha-se do fato de não precisar desses dispositivos tecnológicos, que, mesmo engenhosos, foram criados para capacitá-los a fazer o que pode ser tão facilmente feito por magia. Ter em casa aparelhos como máquinas de secar roupa e telefones seria visto como uma admissão de inadequação mágica.

Pode-se pensar que há uma crítica velada, por parte de Rowling, sobre a ignorância dos *trouxas* quanto ao seu verdadeiro conhecimento sobre mundo – eles sabem o que é superficial, o que sua media consegue apreender, mas não a verdade sobre os fatos, pois esta apenas os bruxos conseguiram compreender. Essa relação já se estabelece com o termo que a autora escolheu para chamar as pessoas não mágicas. Em inglês, *trouxas* são referidos como *muggles,*[10] termo que Rowling diz ter criado a partir da expressão britânica *mug*, que se refere a alguém que é facilmente enganado. As letras "ggle" teriam sido adicionadas para tornar a denominação menos humilhante e mais fofa. O termo, contudo, é utilizado de forma pejorativa ao longo da narrativa – as pessoas não mágicas são retratadas frequentemente como tolas, confusas, completamente ignorantes sobre a existência do mundo mágico.

> Trouxas continuam ignorantes quanto à fonte de seu sofrimento, enquanto continuam a ter grandes perdas[11] (Rowling, 2007, p. 357, tradução nossa).
>
> Até os *trouxas* repararam que alguma coisa está acontecendo. Estava nas notícias deles. [...] Bem, eles não são completamente idiotas. Eles eventualmente iam notar alguma coisa[12] (Rowling, 1998, p. 10, tradução nossa).

Os acontecimentos retratados nos meios de comunicação *trouxa*, quando dizem respeito a algo que envolve a realidade mágica, são suficientes para essas pessoas não mágicas porque elas não sabem da existência do mundo bruxo. Vários relatos da media *trouxa* são incompletos e diversos acontecimentos se tornam curiosidades

9 Há uma exceção ao preconceito dos bruxos com criações trouxas: o automóvel. Os bruxos se apropriaram do veículo de forma massiva e o próprio Ministério da Magia adquiriu sua própria frota de carros.

10 O termo se tornou tão popular que foi incluído no Dicionário Oxford de Língua Inglesa, referenciando Rowling e explicando que, em nosso mundo real, a palavra se refere às pessoas que não têm uma habilidade especial, ou que são consideradas inferiores de alguma forma.

11 No original: "Muggles remain ignorant to the source of their suffering as they continue to sustain heavy casualties".

12 No original: "even the Muggles have noticed something's going on. It was on their news. […] Well, they're not completely stupid. They were bound to notice something".

inexplicadas. Harry, que vive entre as duas realidades, mesmo acompanhando os jornais e os noticiários *trouxas* com os tios, é incapaz de perceber todas as intersecções que existem entre os dois mundos se não soubesse que existe magia e acompanhasse as notícias da comunidade bruxa.

Quando Sirius Black escapa, por exemplo, e Harry acompanha a matéria no noticiário *trouxa,* ele não sabe que o prisioneiro é famoso entre os bruxos e que fugiu de Azkaban. O menino só compreende a verdade sobre quem ele é e de onde escapou quando encontra outro bruxo que acompanha o *Profeta Diário* e narra a história. Na sociedade *trouxa*, quando o mundo mágico intervém em sua realidade e provoca situações inesperadas e inusitadas, os acontecimentos, mesmo noticiados, tornam-se mistérios.

Quando uma notícia sobre milhares de corujas que estavam voando no período do dia aparece no noticiário da televisão *trouxa*, assistido por Vernon Dursley, o leitor da série pode inferir que tais acontecimentos, que ganham destaque por serem incomuns, são causados pelos bruxos. As corujas são a forma de correio bruxo e estavam se comportando dessa maneira peculiar porque um grande evento havia ocorrido no mundo mágico. Para todos os personagens que têm conhecimento da sociedade mágica, é possível perceber a magia permeando o mundo *trouxa*. Para aqueles, contudo, que não sabem de sua existência, esses acontecimentos são percebidos apenas como fatos estranhos.

As notícias *trouxas*, que trabalham com fatos e acontecimentos que têm suas explicações no mundo da magia, sempre terão um relato superficial, por vezes errôneo, e muitas vezes incompleto. O sentido dos acontecimentos se perde para os *trouxas* – o que explica os fenômenos é vedado aos não mágicos. Seus meios de comunicação sempre mostrarão a realidade ao seu alcance, mas, no universo criado por Rowling, esta é uma realidade incompleta, ignorante em relação ao mundo bruxo.

3.1. Televisão

A televisão é o único veículo unicamente *trouxa*. Entre os livros, filmes e história interativa, há 12 aparições do meio de comunicação em relação ao jornalismo. Os bruxos, em seu dia a dia, não precisam de eletricidade, que se coloca dentro da história como aquilo que os *trouxas* precisaram inventar para compensar a falta de magia. Enquanto os bruxos não têm a necessidade de objetos mundanos que dependem da eletricidade, como micro-ondas e máquinas de lavar; a televisão não encontra uma correspondência no mundo bruxo e gera curiosidade em vários membros da comunidade mágica.

O mais próximo que a comunidade mágica tem da televisão são as fotografias em movimento utilizadas pelos meios de comunicação impressos para ilustrar suas notícias. Essas fotografias, contudo, se aproximam mais do que conhecemos como *gifs*[13]– animações formadas por várias imagens compactadas em uma só, breve e repetitiva. Um grupo de bruxos, apaixonados pelas peculiaridades do mundo *trouxa*, tentaram criar seu próprio canal de televisão, mas o projeto foi interrompido pelo Ministério da Magia, que acreditava que divulgar informações bruxas em um aparelho *trouxa* arriscaria expor a comunidade mágica ao mundo normal.

Em nenhuma plataforma da franquia um canal específico é nomeado, apesar de se ter a denominação de um programa noticioso ao longo dos filmes: *News at Ten*. O jornalismo aparece na televisão através de programas de notícia genéricos, sempre na casa dos Dursley. Vale notar que o meio aparece também na casa de outros personagens do mundo *trouxa*, mas não com programas relacionados ao jornalismo. Nas obras de Rowling, os Dursley recorrem aos noticiários para saber o que ocorreu de importante em sua cidade, no país e no mundo recentemente. Isso pode ser observado em todo o desenvolvimento da franquia, quando aparecem cenas na narrativa como a de Vernon Dursley, que, antes de dormir, sentava em frente à televisão para assistir ao jornal da noite e ouvir as últimas notícias do dia.

3.2. Rádio

Os aparelhos de rádios utilizados pela comunidade bruxa foram apropriados da tecnologia *trouxa* legalmente e modificados e enfeitiçados pela comunidade bruxa para seu uso próprio. Vários rádios bruxos passaram a existir e a transmitir programas regulares. Os *trouxas* conseguem ouvir, de vez em quando e por acidente, pedaços da programação bruxa, mas o Ministério da Magia não considera isso um risco para a exposição da comunidade mágica. Vemos, portanto, que há um controle do uso dos meios de comunicação pelo governo, principalmente no que diz respeito às intersecções do mundo mágico e *trouxa*, determinando quais meios de comunicação podem ser utilizados pela sociedade mágica, estabelecendo quais os riscos aceitáveis quanto a sua exposição.

Em todas as plataformas, o rádio aparece em grande parte do enredo no plano de fundo da história, compondo as cenas cotidianas, figurados apenas programas de no-

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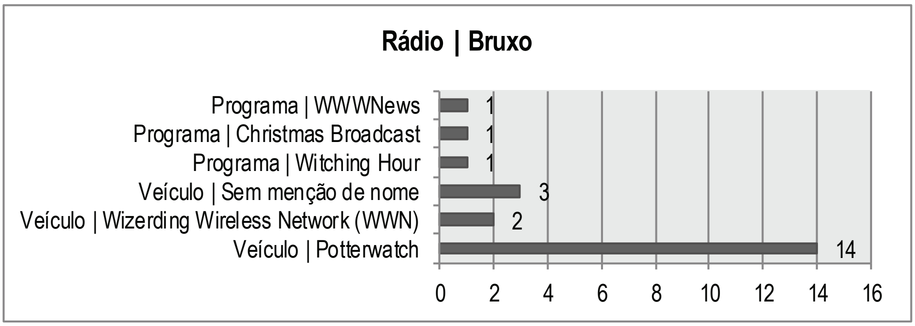
13 *Graphics Interchange Format* é um formato de imagem em mapa de bits utilizado na *web* para imagens fixas e para gerar animações.

tícia genéricos; há menção à emissora *WWN – Wizarding Wireless Network* – como parte frequente das famílias bruxas e menções dos programas *Witching Hour*, *WWN News* e *Christmas Broadcast*. Na realidade *trouxa*, o rádio também figura no plano de fundo das cenas, com uma estação nomeada, a *FM Dial*.

Figura 5
Programas e Veículos do Rádio Bruxo



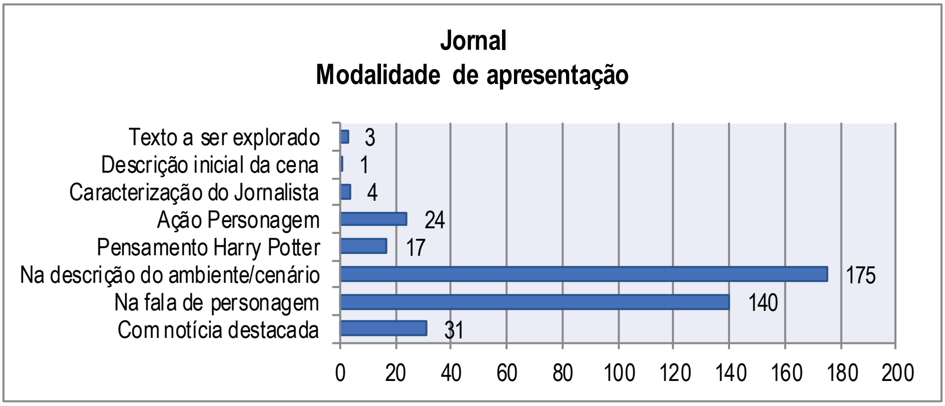
A presença do veículo ligado ao jornalismo na narrativa aparece principalmente a partir da rádio *Potterwatch,* que tem 14 (64%) aparições no *corpus,* das 22 aparições de meios ligados ao rádio bruxo. Ela é iniciada por pessoas que ainda resistiam a Voldemort, quando ele toma o poder. A rádio conseguiu sobreviver sempre mudando de lugar e utilizando senhas para que os ouvintes se conectassem a cada transmissão, o que tornava o acesso limitado. Os apresentadores, apoiadores de Harry, reportavam as mortes que não eram noticiadas nos outros meios de comunicação. Eles mantinham a esperança de que Harry estava vivo e apelavam aos bruxos que não só se protegessem, mas também ajudassem seus vizinhos *trouxas*, que também estavam sendo assassinados pelos Comensais da Morte.

3.3 Jornal impresso

Mesmo sem serem sempre centrais para o acontecimento da história, os jornais impressos aparecem de forma constante em todas as plataformas, sendo marcados como parte da rotina dos personagens. Dentre as 395 aparições de jornais impressos no *corpus*, 175 (44%) foram na descrição do ambiente dos livros ou como elementos compositivos dos cenários, dado que indica a configuração do jornalismo impresso como parte do cotidiano, tanto de *trouxas* como de bruxos.

Figura 6

Modalidades de Apresentação do Jornal no Corpus



Na realidade *trouxa*, o jornal aparece no cotidiano da casa dos Dursley, a partir do hábito de leitura do tio Vernon, com 25 aparições entre filmes, livros e história interativa. Dentre as aparições dos jornais impressos, 24 ocorrem através de veículos genéricos, sem nomeação, e uma menção nos livros indica o veículo *Daily Mail* (Figura 6). O fato de os veículos não serem nomeados não diminui sua importância para a história – eles continuam cumprindo a função de informar –, mas tal fato pode ser explicado pela pluralidade de veículos que temos hoje em nossa sociedade. Como coloca Martin-Barbero (1997), nosso mundo é incorporado no processo de redação de uma história e penetra a narrativa deixando seus traços no texto. Rowling observa seu contexto para compor a realidade *trouxa* de seu enredo: temos inúmeros veículos que oferecem informações de diversas perspectivas e escolhemos aquele que melhor responde às nossas expectativas no momento. O mesmo se aplica aos personagens da série da realidade *trouxa*, no sentido de que, em meio a diversas opções de veículos, eles escolhem o que melhor satisfaz sua necessidade por informação.

Figura 7
Referência ao Veículo Jornal na Comunidade Trouxa

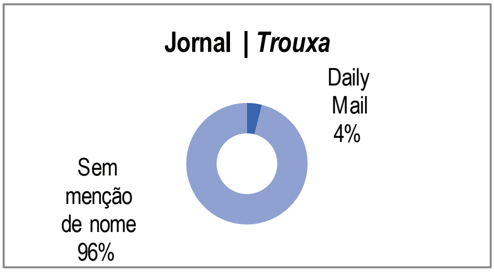
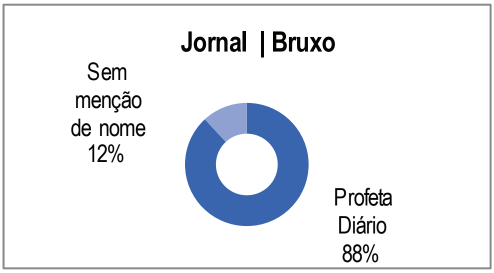


Figura 8
Referência ao Veículo Jornal na Comunidade Bruxa



O *Profeta Diário* (*Daily Prophet*) é o símbolo da media impressa dos veículos mágicos e o principal retratado em toda a franquia, com 348 aparições das 555 de meios de comunicação (Figura 8) entre história interativa, filmes e livros, aparecendo em todas as plataformas. O *Profeta Diário* é o único jornal impresso da Grã-Bretanha. Com uma sede no Beco Diagonal[14], o jornal é entregue diariamente pelas corujas para quase todas as residências bruxas no Reino Unido. O *Profeta Diário*, com o valor da entrega incluída, custa cinco *knuts* – menor moeda bruxa, um preço acessível ao público. O seu pagamento é efetuado ao se colocar moedas em uma bolsa carregada pela coruja. O jornal tem uma edição diária, mas, ocasionalmente, quando algo particularmente interessante ou emocionante acontece no mundo bruxo, uma edição especial do *Evening Prophet* é publicada.

Se uma pluralidade quanto aos meios de comunicação pode ser inferida na realidade *trouxa*, a realidade bruxa parece demarcar no jornalismo impresso à constituição de um monopólio[15] no serviço de informações, definido por Christofoletti (2008b, p. 5), como "uma organização de mercado que se caracteriza pelo controle da oferta de produtos ou serviços por um único operador". O jornal *Profeta Diário* é o único jornal impresso bruxo do Reino Unido, sem concorrentes, monopolizando o mercado e podendo definir arbitrariamente preços e condições para seus consumidores. A escolha de estabelecer um preço acessível indica a preocupação em se ter uma grande audiência e um grande número de leitores, além de manter-se

14 Uma área de compras situadas em Londres, Inglaterra, com uma variedade de restaurantes, lojas e outras atrações. O Beco está completamente escondido do mundo *trouxa*.

15 Ironicamente, na Inglaterra, onde se passa a maior parte da história de Harry Potter e onde se localiza a sede do *Profeta Diário*, os monopólios são proibidos e não é nem preciso que haja apenas um operador no mercado para se configurar monopólio. Caso exista um meio que controle um terço do mercado de serviços, isto é, uma concorrência restrita, já se constitui um monopólio (Christofoletti, 2008a).

competitivo no mercado de informação que divide com os outros meios da comunidade bruxa, mesmo que não haja competição dentro do mercado do jornalismo impresso.

No âmbito dos meios de comunicação, a formação de um monopólio afeta a pluralidade de conteúdos informativos e compromete a qualidade da informação distribuída (Christofoletti, 2008a). O leitor do jornal impresso no mundo de Harry Potter tem apenas uma opção de fonte de informação (impressa), o que prejudica seu acesso a bens simbólicos, comprometendo "seu imaginário, sua consciência e a formação de opiniões, juízos e compreensões da realidade" (Christofoletti, 2008a, p. 6). No caso do *Profeta Diário*, fica claro no desenvolver do enredo que o governo, quando forte e estável, consegue influenciar aquilo que é publicado. À medida que este é o principal meio de informação da comunidade bruxa e também o único jornal impresso, os prejuízos ao consumidor ficam evidentes ao longo da história.

É a partir do jornal que mesmo aqueles que têm pouca convivência com outros bruxos podem manter uma ligação com essa comunidade. A publicação assume a função de informar a comunidade bruxa sobre os principais acontecimentos de sua realidade, o que se torna ainda mais importante no mundo da magia, pois o jornal é, para muitos bruxos sem relações com outros membros da sociedade mágica, a sua única forma de conexão.

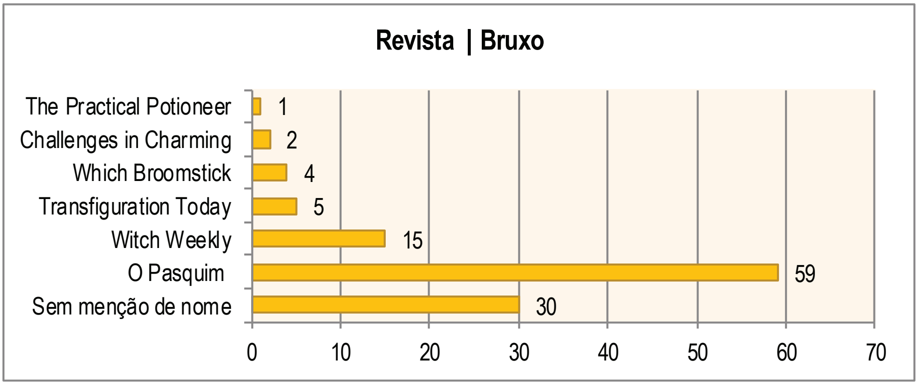
Em um conteúdo exclusivo do *Pottermore* sobre o *Profeta Diário*, Rowling indica que o jornal impresso deve continuar sendo favorecido pela sociedade bruxa. Mesmo parecendo antiquado frente às novas tecnologias *trouxas*, que buscam cada vez mais informações na internet, o jornal impresso continua com uma alta circulação na sociedade mágica, pois dispõe de recursos únicos, como a fotografia em movimento. Enquanto os *trouxas* tiveram de ampliar seu leque de recursos para satisfazer as expectativas quanto as notícias, o jornal impresso bruxo consegue satisfazer a demanda de seu público utilizando a magia.

3.4 Revista impressa

Várias revistas foram mapeadas ao longo do enredo de Rowling, aparecendo de maneiras diferentes em cada plataforma e assumindo espaços variados ao longo da história (Figura 8). Nenhuma revista aparece na realidade *trouxa* concretamente ligada ao jornalismo, apesar de haver menções a publicações de fofocas e de uma revista de crochê, enquanto seis[16] revistas são nomeadas na comunidade bruxa entre os livros, os filmes e o *site Pottermore*.

Figura 9

Títulos das Revistas Bruxa que Circulam na Comunidade Bruxa



O Pasquim (*The Quibbler*) aparece 59 vezes no *corpus* e é inserido na narrativa como uma publicação alternativa, em que matérias que não têm espaço na media tradicional podem ser divulgadas. A revista possibilita que as minorias veiculem a sua versão dos fatos. Os mesmos assuntos podem ser publicados, por exemplo, tanto no *Pasquim* quanto no *Profeta Diário*, mas com diferentes enfoques. *O Pasquim* ficou conhecido por publicar matérias consideradas bobagens, notícias que não condiziam com a realidade e não tinham qualquer valor informativo, geralmente assumindo formatos criativos e excêntricos. Quando Voldemort volta ao poder, a revista muda sua perspectiva e assume um espaço de fala no qual se torna referência para a verdade e coerência com a realidade.

A *Witch Weekly*, revista que aparece em momentos pontuais da história, com 15 menções no *corpus*, apresenta-se como uma publicação que discute em grandes reportagens assuntos que recebem ou pouco espaço no jornal, ou nem sequer aparecem

16 Em uma exposição dos objetos usados nos filmes da franquia (*Harry Potter: The Exhibition*), havia um pôster da revista *Seeker Weekly*. Ela foi criada pelo time de criação de objetos para o cenário do filme *Harry Potter e o Cálice de Fogo*. A arte da revista apareceu depois, no jogo de *videogame Harry Potter and the Goblet of Fire* e na exposição, não sendo visível durante o filme e, por isso, não constando em nossa catalogação. Informações trazidas na suposta capa da revista contradizem, inclusive, informações oficiais da franquia, escritas por Rowling.

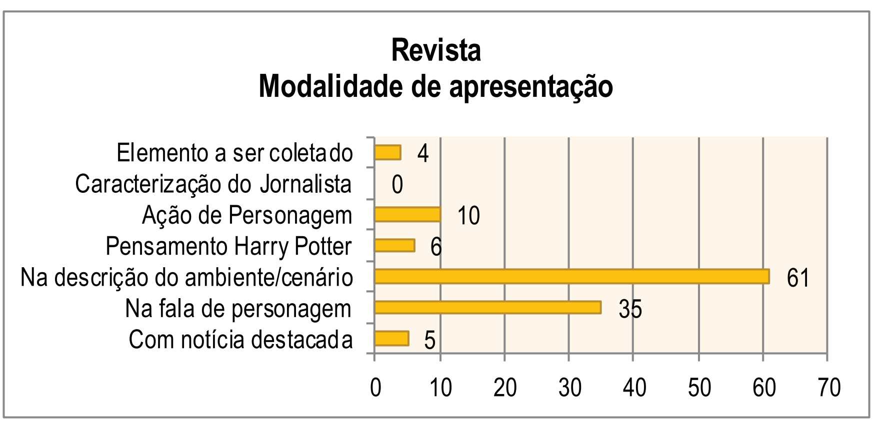
no *Profeta Diário*. Seria o equivalente a uma publicação de fofocas, que tem matérias de interesse humano, com personagens e seus dramas pessoais. É facilmente perceptível que a publicação tem uma ampla audiência e que influencia seus leitores. Personagens, inclusive, mudam suas atitudes de acordo com matérias escritas na revista.

Para a construção da história, a revista *O Pasquim* é mais importante que a *Witch Weekly*. No contexto da sociedade bruxa, contudo, a *Witch Weekly* demonstra ser mais popular pelo seu conteúdo. Como colocam Brin, Charron e Bonville (2004), quando a pauta jornalística se submete à lógica empresarial, busca-se maximizar o público com a priorização de assuntos mais vendáveis e com alto conteúdo emocional, em vez de temas mais duros, como economia e política. Com um conteúdo baseado em *soft news*, trazendo, por exemplo, fofocas sobre celebridades, a revista *Witch Weekly* apela para um grande público consumidor. Enquanto *O Pasquim*, mesmo trabalhando de forma criativa com o texto noticioso, traz conteúdos mais próximos do *hard news,* que apelam a um público mais intelectual e específico.

A revista *Which Broomstick* é mencionada apenas nos livros, com quatro aparições, e traz avaliações das melhores vassouras voadoras, principalmente no âmbito do Quadribol. A revista *The Practical Potioneer* é acadêmica, dedicada ao estudo de poções, também aparecendo apenas nos livros. As outras duas revistas são mencionadas nos livros, não são figuradas nos filmes, mas apareciam como conteúdo exclusivo no antigo *Pottermore*. As duas são acadêmicas, mas trazem novidades e notícias das áreas com as quais trabalham: *Transfiguração Hoje* (*Transfiguration Today*), com cinco aparições, e *Desafios em Feitiçaria* (*Challanges in Charming*), com duas.

Figura 10

Modalidades de Apresentação do Jornal no Corpus



Conforme a tabulação realizada, é possível perceber que há dois contextos principais nos quais as revistas aparecem no *corpus,* somando 96 dentre as 121 aparições. O primeiro contexto indica a revista como um elemento do cotidiano dos personagens, presente 61 vezes na descrição do ambiente ou cenário. Ela insere-se na rotina ao ter espaço nas casas bruxas e em Hogwarts, não como elemento central no acontecimento, mas como parte comum do dia a dia dos personagens. O segundo contexto indica o modo como os tópicos debatidos nas revistas se tornam parte da conversação rotineira, visto que o meio aparece 35 vezes na fala de personagens.

3.5. Jornalistas

Os jornalistas, como personagens, aparecem apenas na realidade bruxa, apesar de vermos a figura de apresentadores de programas de televisão dos *trouxas*. Três repórteres de televisão *trouxa* são nomeados nos livros – Ted, Jim McGuffin e Mary Dorkins, enquanto outros aparecem tanto nos livros quanto nos filmes apenas indicados como âncoras (Figuras 11 e 12).

Figura 11

Presença de Jornalistas nas Sociedades Bruxa e Trouxa

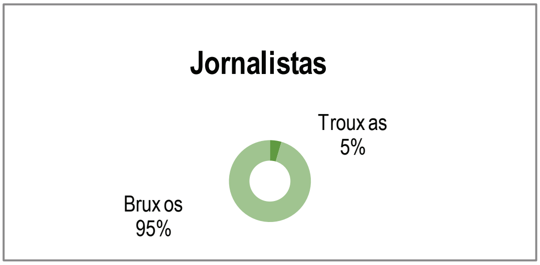


Figura 12

Jornalistas Presentes na Sociedade Trouxa

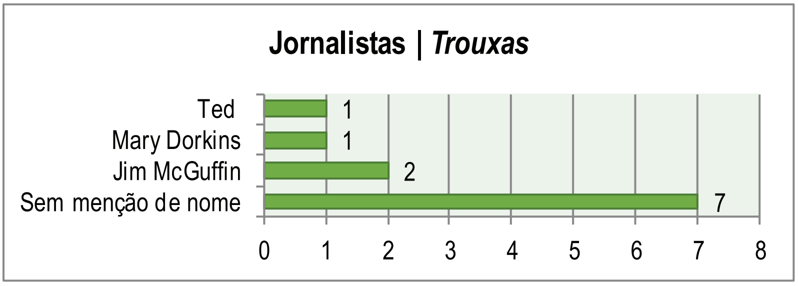
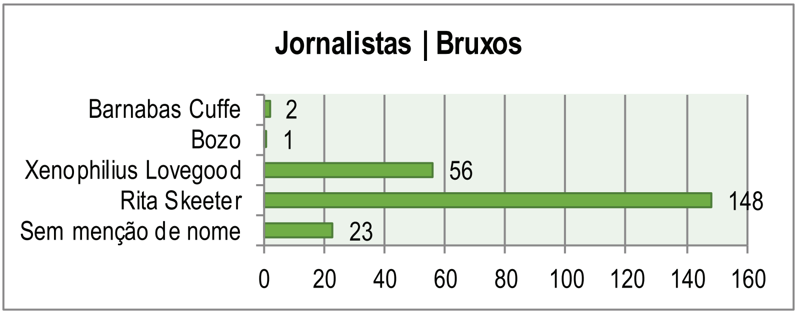


Figura 13
Jornalistas Presentes na Sociedade Bruxa



Na sociedade bruxa (Figura 13), Rita Skeeter é a profissional com maior número de aparições (148). A repórter trabalha para os principais veículos impressos da comunidade bruxa: o *Profeta Diário* e a revista *Witch Weekly*. Ao longo de sua carreira como jornalista, escreve também para *O Pasquim*. Ela é a única profissional cumprindo a função de jornalista que aparece nas três plataformas. Skeeter é caracterizada por sua implacável busca por novidades, escândalos e curiosidades que possam agradar ao seu público e repercutir entre os bruxos. Ela seria a encarnação do estereótipo do jornalista vilão identificado por Travancas (2003): sem escrúpulos ou qualquer comprometimento com a verdade, manipula os fatos para favorecer sua história, está sempre em busca do mítico furo, valoriza o *status* que o jornalismo lhe garante na sociedade e trabalha para uma empresa que se importa apenas com seus interesses (lucro e audiência).

Xenophilius Lovegood aparece 56 vezes entre os livros, a história interativa e os filmes. Ele é dono, editor e repórter da revista *O Pasquim,* publicação que reflete a sua excentricidade, expressando sua personalidade. Lovegood gerencia a publicação de forma que os assuntos escolhidos tenham um foco condizente com o perfil da revista, sem ter preocupação com um público determinado, com o lucro ou com a audiência. Ele foge aos estereótipos do jornalista na ficção, identificado por Travancas (2003), uma vez que em momento algum é colocado como vilão ou consegue atingir o *status* de herói em sua busca da verdade. O seu papel se torna essencial na narrativa não por incorporar características que parecem clássicas no jornalista, mas por viabilizar a abertura de um espaço alternativo para o jornalismo.

Ginny Potter é uma personagem conhecida da franquia: membro da família Weasley, e depois namorada de Harry, ela aparece nos livros, filmes e história interativa como uma jovem estudante de magia e bruxaria de Hogwarts. Na seção do *Profeta Diário* do antigo *Pottermore* é que ela vai aparecer adulta, uma profissional do jornalismo. Ginny é correspondente de esportes do jornal e já tem experiência suficiente para cobrir, sozinha, um evento do porte da Copa do Mundo de Quadribol. Como ela aparece assumindo a profissão apenas nesta seção do *Pottermore*, sendo introduzida como jornalista nesse contexto, optou-se por não categorizá-la junto ao instrumento de coleta de dados, que enfocou livros, filmes e história interativa, onde a personagem aparece como adolescente.

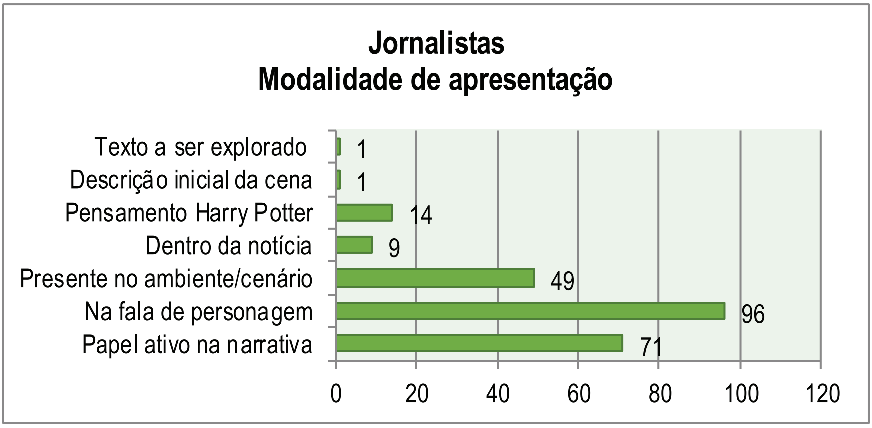
Há também a figura do fotógrafo do *Profeta Diário*. Primeiramente ele não é nomeado, mas, ao se tornar companheiro de Skeeter, descobrimos que seu nome é Bozo. O fotógrafo aparece apenas em momentos pontuais da história, tanto nos livros como nos filmes, com 20 aparições, sem ser figurado na história interativa. Ele é descrito no antigo *Pottermore* como sendo uma pessoa de pavio-curto, mas aparece no *site* apenas em uma página ligada às suas aparições nos livros impressos, sem participar da história interativa ou da seção do *Profeta Diário*. Ele aparece no enredo como sendo capaz e eficiente em seu trabalho, além de ter noção de que, por trabalhar com o principal jornal da comunidade bruxa, tem prestigio no mundo mágico.

No sexto volume da série, tanto no filme quanto no livro, temos a primeira e única menção a Barnabas Cuffe, editor do *Profeta Diário*, através da fala de outro personagem. Repórteres e fotógrafos genéricos do mundo bruxo, sem indicação do veículo para qual trabalham, aparecem nos filmes em cenas de entrevista de membros do Ministério da Magia. Enquanto eles aparecem tirando fotos e fazendo perguntas, sua ação não é central para o desenvolvimento da história. Apenas um deles faz uma pergunta que pode ser ouvida pelo espectador, tornando-se um breve personagem no filme.

Os jornalistas aparecem no *corpus* em três principais contextos (Figura 14), que representam 216 das 241 aparições. O primeiro contexto é na fala dos personagens, o que demonstra tanto a interação dos jornalistas com os personagens, como o fato de os profissionais tornarem-se assunto de conversação entre eles, que debatem desde as notícias de sua autoria até sua conduta profissional. O segundo contexto indica o papel ativo do jornalista na narrativa, que aparece como personagem central na cena, interagindo com os demais e cumprindo sua função profissional. O terceiro contexto diz respeito a sua presença no ambiente/cenário, mas não de forma participativa, sendo um coadjuvante para o que acontece no enredo.

Figura 14

Modalidades de Apresentação dos Jornalistas no Corpus



Deve-se observar, ainda, que os jornalistas aparecem isolados do ambiente da redação. Enquanto fica claro para qual publicação trabalham, sempre aparecem em campo, buscando o acontecimento, investigando a notícia e conversando com as fontes. Pode-se ter a ideia de uma cultura da profissão no enredo de Rowling a partir da fala dos personagens, que indicam suas percepções sobre a atividade jornalística e acenam para o fato de estarem inseridos em uma instituição que é maior que sua pessoa particular.

O *ethos* da profissão – forma de ser e estar no jornalismo – permeia as ações e os comportamentos dos jornalistas da série, encobrindo a atividade jornalística e elaborando uma mitologia em torno dos profissionais e do campo jornalístico. O mito do furo, como a possibilidade de diferenciação profissional e da conquista de notoriedade, aparece em Harry Potter não apenas como mérito para o jornalista, mas também para seu meio de comunicação, que pode declarar ter exclusividade sobre o assunto. O mito do jornalismo como grande aventura e do jornalista como responsável pela procura a verdade também está presente na série.

A mitologia criada em torno do jornalismo é projetada no imaginário da sociedade (Traquina, 2008), além de ser incorporada por parte dos profissionais. Em Harry Potter, os principais mitos da profissão são reforçados como parte integral do jornalismo. Mesmo não reproduzindo as dinâmicas de uma redação jornalística em sua narrativa, a série reitera essas marcas do imaginário por meio dos jornalistas criados na série e do jornalismo construído por Rowling com os meios de comunicação como partes integrais da comunidade mágica.

4. CONSIDERAÇÕES FINAIS

A franquia transmedia de Harry Potter vale mais de 15 bilhões de dólares e tem sua história espalhada por inúmeras plataformas, alçando um número massivo de pessoas, que podem escolher como preferem vivenciar o universo criado por J.K. Rowling. Harry Potter é um fenômeno contemporâneo da convergência de diferentes sistemas de significação, em que um está implicado no outro.

Este artigo cria um movimento em direção a um elemento particular desse universo criado por Rowling, o jornalismo. Ao tomarmos como objeto empírico uma criação ficcional contemporânea que traz representações do jornalismo e do jornalista, podemos refletir sobre a estrutura e os princípios da profissão que são representados em um produto cultural que aciona a construção do imaginário nesta virada de século. A partir da análise de conteúdo, extraímos dados concretos que permitem atestarmos a presença da profissão na narrativa transmedia de Harry Potter e pensarmos que esta se coloca como um elemento articulador da narrativa, que integra lógicas de composição e mimetiza parte dos processos da profissão.

Consideramos a ficção é um espaço de imaginação; que tem regras e recortes próprios (Balogh, 2002). Ela já apresentou o jornalismo inúmeras vezes, em representações dotadas de verossimilhança, mas que não são um espelho do real. Criamos universos de representação do jornalismo e podemos muni-los de características baseadas no real ou não; são espaços de reflexão flexíveis, qualquer jornalismo pode existir na ficção. Nunca haverá uma mimese plena, contudo, isso não impede que se use o ficcional para se gerar reflexões sobre o real. Nesse sentido, o jornalismo é uma atividade passível de contestação – audiências e jornalistas usam a ficção como um catalisador para pensar a profissão.

Nos livros e nos filmes, o jornalismo e o jornalista fazem parte do universo representado. No *site Pottermore,* eles faziam parte da interação entre o utilizador da rede e o universo ficcional. O jornalismo, além de ser representação, ganha vida própria, espelhando os valores da vida cotidiana contemporânea, globalizada e mercadológica. A profissão se torna uma forma de se entrar na *realidade* do *mundo mágico.* De certo modo, a função mediadora do jornalismo é trazida para a ficção como uma forma de acesso a esse universo.

Cada plataforma da história transmedia de Harry Potter, como define Jenkins (2009a), contribui com novas informações e perspectivas sobre o universo criado em torno do menino bruxo. A partir das representações produzidas em cada uma das plataformas, é possível estabelecer a representação do jornalismo nesse enredo ficcional, tanto no âmbito dos veículos que fazem parte da narrativa, quanto dos personagens identificados como jornalistas.

Os fãs se apropriam das histórias de Harry Potter e conquistam o direito de fazer o uso que desejarem da narrativa, lendo (assistindo, ouvindo...) e interpretando o seu conteúdo da forma que lhes convém. Ao mesmo tempo, a história mantém o seu caráter de discurso: é a voz de Rowling, que expressa o que pensa, que se comunica, que tem seu pensamento abraçado e compartilhado. O jornalismo ficcional criado na série é uma criação de Rowling, por isso não pode ser visto como espelho do real; mas ainda é imbuído na legitimidade da profissão como instituição social – o jornalismo tem credibilidade para informar.

O universo transmedia criado por Rowling auxilia em nossa busca para interpretar o cotidiano. As representações do jornalismo marcam o imaginário da profissão e o alcance da obra de Rowling faz a imagem da profissão atingir um público amplo e heterogêneo. A autora imaginou uma realidade dotada de magia, mas que reflete sua visão do mundo e que possibilita aos fãs acionarem estratégias próprias para interpretar a sua realidade.

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Estrategias Alimentarias de Unidades Domésticas Vulnerables en Sectores Periurbanos de la Provincia de Buenos Aires (Argentina). Aportes al Diseño y la Gestión de Organizaciones Locales y Políticas Públicas Actuales

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Resumen

Diversas condiciones estructurales y contextuales pueden situar a las poblaciones en una condición histórica de vulnerabilidad respecto a su alimentación. A través de las políticas públicas, los Estados han intentado suplir algunas carencias, sin embargo sus necesidades no alcanzan a ser satisfechas y las unidades domésticas (UD) precisan garantizar la llegada de los alimentos mediante otras vías. El propósito de este artículo es identificar y describir las estrategias para la obtención, producción, distribución y consumo de alimentos desarrolladas por UD beneficiarias de planes alimentarios en Berisso (Provincia de Buenos Aires, Argentina) durante 2011 a 2013 y en su proyección en la actualidad. Se focalizará en las formas de organización, actores sociales involucrados y relaciones establecidas. Desde un enfoque etnográfico, utilizando entrevistas semi-estructuradas y observaciones no sistemáticas, se describe la utilización planes alimentarios, asistencia a comedores, contacto con diversas instituciones y formas alternativas de obtención. En el desarrollo de dichas estrategias se registra el protagonismo del género femenino, la movilización por distintos espacios y el contacto con diversas personas. De esta manera, se mostró que las estrategias trascendieron las UD, foco de las políticas estatales. Considerar el alcance de esas estrategias que superan la escala individual y/o doméstica, y muestran un alcance colectivo, puede resultar de utilidad para mejorar el diseño y gestión de programas alimentarios, en la actualidad.

Palabras clave: Estrategias alimentarias, unidades domésticas, relaciones sociales, políticas públicas de alimentación, etnografía.

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Estratégias Alimentares de Unidades Domésticas Vulneráveis nos Setores Periurbanos da Província de Buenos Aires (Argentina). Contribuições para o Desenho e Gestão de Localidades e Políticas Públicas Atuais

Resumo

Várias condições estruturais e contextuais podem colocar as populações numa condição histórica de vulnerabilidade, no que diz respeito à sua alimentação. Através de políticas públicas, os Estados tentam suprir algumas deficiências, no entanto, as necessidades das populações podem não ser atendidas e as unidades domésticas (UD) precisam de garantir a chegada de alimentos por outros meios. O objetivo deste artigo é identificar e descrever as estratégias para obter, produzir, distribuir e consumir alimentos desenvolvidos pelos beneficiários da UD dos planos alimentares em Berisso (província de Buenos Aires, Argentina) durante 2011-2013 e sua projeção na atualidade. O artigo concentra-se nas formas de organização, nos atores sociais envolvidos e nos relacionamentos estabelecidos. Através de uma abordagem etnográfica, com recurso a entrevistas semiestruturadas e observações sistemáticas, descreve-se a utilização dos planos alimentares, a assistência às salas de refeições, o contacto com várias instituições e as formas alternativas de obter alimentos. No desenvolvimento dessas estratégias, regista-se o protagonismo do género feminino, a mobilização de diversos espaços e o contato com diferentes pessoas. Desta forma, demonstrou-se que as estratégias transcenderam a UD, o foco das políticas estatais. A consideração do alcance dessas estratégias que vão além da escala individual e/ou doméstica e que têm uma dimensão coletiva, pode ser útil para melhorar o design e a gestão dos programas alimentares na atualidade.

Palavras-chave: Estratégias alimentares, unidades domésticas, relações sociais, políticas públicas de alimentação, etnografia.

Food Strategies of Vulnerable Domestic Units in Peri-Urban Sectors of the Province of Buenos Aires (Argentina). Contributions to the Design and Management of Local Organizations and Current Public Policies

Abstract

Various structural and contextual conditions can place populations in a historical condition of vulnerability regarding their diet. Through public policies, the States have tried to fill some deficiencies, however their needs cannot be met and the domestic units (UD) need to guarantee the arrival of food through other means. The purpose of this article is to identify and describe the strategies for obtaining, producing, distributing and consuming food developed by UD beneficiaries of food plans in Berisso during 2011-2013 in (Province of Buenos Aires, Argentina) and their current projection. It will focus on the forms of organization, social actors involved and established relationships. From an ethnographic approach, using semi-structured interviews and unsystematic observations, the use of meal plans, assistance to dining rooms, contact with various institutions and alternative ways of obtaining it is described. In the development of said strategies the prominence of the female gender is registered, mobilization through different spaces and contact with different people. In this way, it was shown that the strategies transcended the UD, focus of state policies. Considering the scope of these strategies that go beyond the individual and / or domestic scale, and show a collective scope, can be useful to improve the design and management of food programs today.

Keywords: Food strategies, domestic units, social relation, public food policies, ethnography.

INTRODUCCIÓN[2]

En aquellos escenarios donde el acceso a los alimentos se encuentra restringido, los Estados han desarrollado diversas estrategias para paliar las consecuencias posibles sobre la población, especialmente a partir de la generación de programas alimentarios para cubrir algunas necesidades básicas de las unidades domésticas (en adelante UD) que cuentan con muy bajos recursos económicos. Los programas alimentarios consisten en un conjunto de acciones mediante las cuales se distribuyen alimentos -o se entrega dinero para que puedan comprar mejores alimentos- a grupos de población con necesidades especiales (niños, familias con niños, personas de bajos recursos económicos y personas con enfermedades) (OMS, 2004). Los mismos se concretan y operativizan dentro de planes, que consisten en metas genéricas que, a distintos niveles de la planificación estatal, establecen prioridades y criterios, deter-

2 El contenido de este artículo se encuentra vinculado a la tesis de Pasarin (2017), para obtener el título de Doctor en Ciencias Naturales en Facultad de Ciencias Naturales y Museo, Universidad Nacional de La Plata, Buenos Aires Argentina. La tesis se titula *"Análisis de redes sociales (ARS) y alimentación: estrategias relacionales en unidades domésticas beneficiarias de planes alimentarios en Berisso (provincia de Buenos Aires)"*. La investigación fue financiada por el Consejo Nacional de Investigaciones Científicas y Técnicas (CONICET) a través de una Beca Interna Doctoral.

minan la población y tipo de cobertura, así como la forma de disponer los recursos; determinando también el presupuesto y el tiempo propuesto para lograr objetivos concretos (Sosa y Olivero, 2013).

Hacia 2007 en la República Argentina, el Estado contaba con una fuerte presencia respecto a programas de apoyo alimentario, con una población objetivo que alcanzaba al 20,8% de los hogares a nivel nacional (MSAL, 2007). En la provincia de Buenos Aires, para el mismo año, casi el 22% de los hogares disponía de algún plan alimentario (MSAL, 2007). Según datos del último censo, la localidad de Berisso (Provincia de Buenos Aires, Argentina) presentaba hacia el 2010 más del 14% de la población con necesidades básicas insatisfechas (INDEC, 2012). La asistencia en las cuestiones alimentarias alcanzaba un porcentaje similar de población, mediante distinta modalidad de planes estatales, donde muchos hogares contaban con más de 10 años de asistencia por parte del Estado[3]. Los hogares con bajos recursos de la localidad apenas podían comprar media canasta básica total, mientras que los indigentes solo podían alcanzar un 57% de la canasta básica alimentaria (González et al., 2012). Diez años después esta problemática alimentaria se mantiene en plena vigencia. Según la Universidad Católica Argentina (UCA) (2019), se observa un fuerte incremento en el último periodo interanual (2017-2018) en torno a la inseguridad alimentaria severa de los niños, niñas y jóvenes, junto con la cobertura de alimentación gratuita, tanto a nivel país urbano como en el conurbano bonaerense. Hacia el tercer trimestre de 2018, el 40,3% de los niños, niñas y jóvenes del Gran Buenos Aires reciben cobertura alimentaria gratuita, el 35,8% se encuentran en inseguridad alimentaria total y 17,4% inseguridad severa (Sánchez y Tuñón, 2019).

Tomando en consideración que a pesar de la ayuda estatal las necesidades alimentarias aún no alcanzan a ser satisfechas, es factible que las UD desplieguen diversas actividades que les permitan, de alguna manera, garantizar la llegada de los alimentos dentro de este contexto vulnerable.

En este artículo se presentan datos y resultados del estudio etnográfico de campo realizado en los años 2011-2013, que describe contextos y procesos coincidentes con los reportes actuales para las mismas poblaciones, en el mismo territorio. De este modo se propone analizar las estrategias para la obtención/producción, distribución

3 Hacia el año 2011 se disponía de los siguientes Planes y Programas: Plan Nacional de Seguridad Alimentaria , Programa Materno Infantil (PMI), Plan Más Vida (PMV), Servicio Alimentario Escolar (SAE), Unidad De Desarrollo Infantil (UDI) (para una descripción más detallada de población alcanzada, organismo efectos, modalidad y situación particular en la localidad de Berisso; ver Pasarin 2017) .

y consumo de alimentos desarrolladas por UD beneficiarias de planes alimentarios en el Municipio de Berisso (Provincia de Buenos Aires, Argentina). Así como los aspectos relacionales vinculados a diferentes estrategias alimentarias. En este sentido, consideramos la vigencia de la formulación del tema y la delimitación del problema, así como el diseño de la investigación, para interpretar la situación actual.

Sobre las estrategias y la visión relacional en la alimentación

La alimentación puede entenderse como hecho relacional por naturaleza. A pesar de que la satisfacción de las necesidades nutricionales pueda realizarse en forma individual, las estrategias para obtener, consumir y distribuir los alimentos se encuentran estrechamente ligadas al vínculo con otras personas.

En antropología, son pioneros los estudios que consideran el aspecto relacional describiendo el intercambio de alimentos y exponiendo el impacto de la escasez estacional sobre las relaciones sociales. Dichos trabajos focalizan en la asociación entre las formas de cooperación (o no cooperación) con la disponibilidad de alimentos en comunidades indígenas (Messer, 1984). En el mismo sentido, Henry (1951) describe la red de intercambio de comida entre grupos familiares de una comunidad Pilagá de Argentina, donde los alimentos circulan y se distribuyen a otros integrantes de la comunidad que no pueden adquirirlos. Otros estudios de la década del '80 muestran la importancia de las relaciones de intercambio de alimentos para la supervivencia en regiones selváticas (Messer, 1984).

En contextos urbanos y suburbanos, Lomnitz (1975), incluye como parte de su clásico estudio de las estrategias de sobrevivencia en barriadas pobres en México DF, el abordaje de las redes de intercambio recíproco para la obtención de bienes, servicios y apoyo social. La autora caracteriza los préstamos de alimentos dentro de esa red de intercambios. En un trabajo posterior, Carlos Lomnitz y Larissa Adler de Lomnitz (1987) analizan los hábitos alimentarios y las relaciones sociales que ocurren tanto dentro como fuera del hogar en México.

En la ciudad de Paranaguá en Brasil, Gerhardt (2003) describe las redes de circulación de los alimentos a través de las estrategias de orden individual y colectivo que realizan las familias para la provisión de alimentos de acuerdo a su situación económica y el lugar en que se instala su vivienda, mostrando el establecimiento de relaciones clientelares, de búsqueda de prestigio y obligaciones religiosas de caridad, con parientes cercanos, familias vecinas e instituciones de la periferia de la ciudad.

En Argentina, Nora Garrote (1997) también analiza la alimentación desde un punto de vista relacional, describiendo como referente, dador y comensales a los actores vinculados a la obtención, preparación y distribución de alimentos en familias de bajos recursos económicos. Para el área metropolitana de Buenos Aires, Patricia Aguirre (2005), da cuenta que las relaciones sociales establecidas en momentos críticos, que involucran el movimiento de bienes e información para la obtención de alimentos, contienen un compromiso tácito de devolución.

En relación particular a las estrategias, se destacan también los estudios realizados entre los años 1963 y 1965 por la Comisión Económica para América Latina y el Caribe (CEPAL), que contemplaban la inclusión de lazos de parentesco para la construcción de las estrategias en contextos urbanos. Posteriormente se discutieron los aspectos teóricos y metodológicos del enfoque de las "estrategias", criticados por no incluir el aspecto relacional (Cuéllar Saavedra, 2013).

Entre aquellos estudios que consideran los aspectos relacionales para las estrategias, se destacan dos estudios sociológicos. En primer lugar, la investigación de Vicente Espinoza (1999) en dos barrios de bajos recursos de la ciudad de Santiago (Chile), que usa el concepto de estrategia de supervivencia con un carácter relacional y describe las estrategias por fuera de los hogares, mostrando redes que funcionan entre personas que no eran necesariamente familiares (De Grande, 2015). En Argentina, Susana Hintze (1989) estudia en villas miseria[4] y en la villa La Cava (Gran Buenos Aires), las estrategias que desarrollan familias de bajos recursos económicos para cubrir sus necesidades alimentarias, incluyendo su articulación en el espacio macro social.

Entre los aportes específicos de la antropología, es de relevancia la investigación de Amalia Eguía (1992) en sectores populares urbanos del Gran La Plata (Provincia de Buenos Aires) que describe las formas de organización social y focaliza en la alimentación como uno de los indicadores que contribuyen a la reproducción de la UD. Continuando con esta perspectiva, Susana Ortale (2002, 2007) describe los circuitos de abastecimiento, incluyendo la presencia del mercado, instituciones y redes informales de reciprocidad y redistribución en la población de bajos recursos de La Plata (Buenos Aires, Argentina).

Si bien estos trabajos se refieren al estudio de los aspectos relacionales y/o desa-

4 "Asentamientos ilegales de familias en tierras fiscales y en algunos casos de terceros particulares, habitando en construcciones que no cumplen normas mínimas edilicias o de habitabilidad e higiene, compatible con la vida urbana, configurando un alto grado de hacinamiento poblacional y familiar". Documento interno de la Comisión Municipal de la Vivienda del Gobierno Autónomo de la Ciudad de Buenos Aires, s/f.

rrollan aproximaciones hacia las estrategias vinculadas a la alimentación, ninguno adopta un abordaje exhaustivo de la articulación relaciones sociales-estrategias-alimentación, tal como se propone en este artículo.

En este sentido en este artículo se propone pensar en estrategias relacionales para la alimentación, considerando como estrategia relacional a "todas aquellas acciones, prácticas, actividades o habilidades desarrolladas por los actores sociales para alcanzar un objetivo concreto" (Pasarin, 2017). De esta manera se destaca la movilización de los recursos de todo tipo a partir de la interacción entre individuos, en una aproximación que se proyecta en acciones que se encuentran incrustadas (*embeddnedess*) en las estructuras de las relaciones sociales (Granovetter, 1985).

METODOLOGÍA

En la realización de este trabajo se utilizaron los recursos teórico-metodológicos propios de la etnografía que implica un abordaje de problemáticas sociales actuales, localmente situadas y en perspectiva relacional (Bernard, 2011; Teves, 2011).

Área de Estudio

El partido de Berisso está ubicado a 35° de Latitud Sur y 58° de Longitud Oeste. Cuenta con una superficie de 137,59 km^2 y una densidad poblacional de 643 habitantes/km^2. Limita al noreste con el Río de la Plata, al noroeste con el Puerto de La Plata y la ciudad de Ensenada, al sudoeste con la ciudad de La Plata y al sudeste con el partido de Magdalena. Se encuentra a 65 km de la Ciudad Autónoma de Buenos Aires y a 7 km de La Plata, Capital de la provincia de Buenos Aires.

Berisso nació como localización industrial en 1871, conformada por inmigrantes europeos llegados desde fines de siglo XIX y migrantes del interior de la Argentina. En la actualidad se mantienen tradiciones en danzas, comidas y lenguas de todas partes del país y del mundo, dando a la ciudad su título de "Capital Provincial del Inmigrante". Según datos del Censo Nacional de Población, Hogares y Viviendas hacia el año 2010 habitan en la localidad de Berisso 88.470 personas.

La ciudad se dispone actualmente en 24 barrios. La zona urbana cuenta con el puerto, la mayoría de las viviendas y el centro comercial. La mayor superficie de la localidad está ocupada por una zona de producción fruti-hortícola y vitivinícola y explotación forestal de tradición familiar.

Según cifras del censo 2010, el 14,4% de los hogares de Berisso tienen necesidades básicas insatisfechas (NBI). El 91,4% de la población tiene acceso a la red de agua corriente con provisión dentro de la vivienda y casi el 40% tiene acceso a la red cloacal. Cerca del 35% de la población no está conectada al gas de red, utilizando otros combustibles para la cocción de alimentos, como el gas en zeppelín, gas en tubo o garrafa, electricidad, leña, carbón u otro tipo de combustible.

Relevamiento de los datos

Se realizó trabajo de campo etnográfico (Hammersley y Atkinson, 2007) en distintos periodos entre los años 2011 a 2013, en tres barrios de la localidad de Berisso: Barrio Obrero, Barrio El Carmen y Barrio Villa España.

Como instrumentos para el relevamiento de datos empíricos se utilizaron entrevistas semiestructuradas, contando con el registro completo en audio de este material (Bernard, 2011). Asimismo, se realizaron caminatas por el barrio con las informantes y/o en las visitas a sus hogares, efectuando observaciones no sistemáticas, que fueron registradas en forma de notas en el diario de campo (Emerson et al., 2011). En los casos que fue posible acceder a las viviendas, se incluyeron notaciones más detalladas sobre aspectos materiales vinculados a la alimentación: ollas y menajes/relación con la cantidad de habitantes, tipo de cocina (kerosene, gas natural, garrafa, leña, electricidad), mobiliario, entre otros aspectos.

Material empírico obtenido

A través de 18 informantes mujeres de 20 a 48 años de edad, se obtuvo información relevante a las estrategias alimentarias de sus respectivas UD.

Dichas UD estaban conformadas, en general, por adultos de ambos géneros y niños, conformando mayormente familias nucleares. En dos UD, se mencionó la convivencia de dos hermanas con sus hijos y sin parejas. Se observaron tres UD conformadas por familias monoparentales matrifocales[5].

5 Se refiere a grupos familiares donde conviven una madre, que actúa como centro de las relaciones y sostén económico, y su/s hijo/s.

En cuanto a ingresos, todas las UD recibían subsidios del Estado (Planes Alimentarios y/o Asignación Universal por Hijo/Embarazo o Pensión no Contributiva entregada a la madre de siete 7 o más hijos[6]).

En cuanto al trabajo, los hombres se ocupaban del sostén económico del hogar. Dedicados con mayor frecuencia a "changas", trabajo esporádico, temporal y mal pago, especialmente como albañiles. Con menor frecuencia, algunos contaban con trabajo más estable como trabajadores contratados en las cooperativas del municipio o como empleados en relación de dependencia, resultando en una mayor estabilidad económica. En una UD el sostén del hogar era realizado a través del cartoneo[7] por parte del jefe de familia, utilizando un caballo como animal de carga. A partir de esta actividad obtenían materiales que utilizaban para obtener dinero por la venta de los productos que recolectaban y alimentos para consumo de la UD.

La mayoría de las mujeres entrevistadas refirieron no trabajar fuera del hogar ya que en general se quedaban a cuidado de sus hijos. En el caso de las que sí que trabajaban afuera, realizaban tareas domésticas en otras casas de familia, o contaban con empleo en empresas de limpieza o en las cooperativas municipales. Algunas mujeres citaron la venta de productos cosméticos por catálogo como recurso económico. En un caso se mencionó la venta de productos caseros (tortas, dulces).

En general, las viviendas estaban realizadas con paredes de ladrillos y cemento y techo de chapas. Algunas estaban construidas con madera o chapa. En los casos que

6 La *Asignación Universal por Hijo* (AUH) rige desde noviembre del año 2009 en todo el país, a partir del Decreto P.E.N. 1602/09 que le da origen, proponiendo como organismo administrador la Administración Nacional de la Seguridad Social (ANSES). Se otorga a personas desocupadas o que trabajan en el mercado informal o que ganan menos del salario mínimo, vital y móvil, por cada hijo menor de 18 años o hijo discapacitado (hasta un límite de cinco hijos por grupo familiar). Consiste en el pago mensual de dinero mediante una tarjeta de débito y está condicionada al cumplimiento de los controles sanitarios, del plan de vacunación obligatorio y la concurrencia de los menores aún establecimiento educativo público, si se encuentra en edad escolar. Cuenta con un complemento para madres embarazadas a las cuales se les da la Asignación por Embarazo hasta el nacimiento del niño o interrupción del embarazo. https://www.anses.gob.ar/asignacion-familiar-por-hijo. La ***Pensión no contributiva para madre de siete hijos*** rige desde 1989 por la Ley Nacional N° 23.746. Es una prestación mensual, inembargable y vitalicia. Se otorga a madres de cualquier edad, estado civil, que tengan o hayan tenido siete o más hijos (incluidos los adoptados). Consiste en el pago mensual de un monto de dinero equivalente a un haber mínimo. Esta pensión es incompatible con el cobro de jubilaciones y pensiones, Pensión Universal para el Adulto Mayor, Asignación Familiar por Hijo, Asignación Universal por Hijo y por Embarazo. https://www.anses.gob.ar/pension-no-contributiva-para-madre-de-7-hijos

7 El cartoneo o cirujeo corresponde a la recolección de cartones, aluminio y otros elementos similares, para su reventa en papeleras o chatarrerías, así como cualquier otro artículo de utilidad para su consumo.

fue posible acceder a los domicilios, se observó que las cocinas muchas veces carecían de los elementos necesarios para cocinar, preparar y servir los alimentos, así como de mobiliario (mesa y sillas) acorde a la cantidad de miembros de la UD. En cuanto a los servicios, todas contaban con acceso a agua corriente y, con mayor frecuencia, el uso de gas envasado en garrafas para cocinar.

Sistematización y análisis de los datos

Los datos obtenidos fueron procesados, sistematizados y analizados partiendo de la transcripción textual de las entrevistas y las notas del diario de campo, utilizando el software especializado NVIVO[8], que permite organizar colecciones de datos favoreciendo la identificación de variables relevantes a su descripción y análisis comparativo. En este análisis de contenido, se realizó un análisis inductivo de los datos, organizando la información a partir de su asociación con las categorías propuestas en el estudio y referencias que surgieron del discurso de las entrevistadas (LeCompte y Ludwig, 2013). Luego, se procedió a la comparación constante y análisis de regularidades y diferencias para refinar, modificar y generar nuevos ítems, propias de la aproximación analítica que provee la *grounded theory* o “teoría fundada” (Glaser y Strauss, 1967). Durante todo el proceso de investigación se sostuvieron los resguardos éticos necesarios para proteger la identidad de las entrevistadas y garantizar el uso de adecuado de los datos obtenidos.

RESULTADOS

Los relatos de las informantes permitieron caracterizar las estrategias domésticas vinculadas a la alimentación: qué acciones se realizaron, qué recursos se utilizaron, qué espacios involucraron y quienes intervinieron.

La descripción de cada estrategia y las referencias a los espacios de acción y a los actores involucrados en la misma, resultaron vitales para elaborar un diagnóstico sobre la subsistencia de las familias de bajos recursos económicos. La realización de una estrategia adecuada a esa situación particular de vulnerabilidad económica ha dado lugar a la elección entre diferentes recursos. En este sentido, algunas estrategias resultaron de la derivación o asociación con otra, corolario de la posibilidad de acceder o no a los recursos necesarios para alimentarse.

8 NVivo qualitative data analysis Software; QSR International Pty Ltd. Version 10, 2012.Es un programa de análisis cualitativo de datos.

Estrategias de producción propia de alimentos

Cría de animales y cultivo

La producción de alimentos a escala familiar en las ciudades está limitada por el restringido espacio disponible. Especialmente en sectores de bajos recursos económicos, las condiciones en el acceso al agua potable y el asentamiento de las viviendas en suelos inadecuados, entre otros factores, influyen negativamente en la realización de prácticas productivas (Aguirre, 2004). El ámbito estudiado no constituye una excepción, la cría de animales y el cultivo de hortalizas no fueron estrategias llevadas a cabo en los grupos domésticos de sectores urbanos de la localidad de Berisso. Entre los motivos mencionados se encuentran: la falta de espacio físico; las inundaciones muy frecuentes en la zona; los problemas con la permeabilidad de la tierra y la contaminación del suelo por la cercanía de las napas freáticas, que generan un suelo muy duro y poco fértil y la pérdida de los cultivos por exceso de agua. En general, las entrevistadas mencionaron que preferían comprar antes que producir, por las pocas personas que habitan en los hogares y el tiempo que demandaba la labor productiva. Esto se encuentra en contraste con las estrategias de sus ancestros, primeros inmigrantes de la zona, que según refirieron las entrevistadas, llegaron a la localidad con la práctica de organizar huertas y criar gallinas en sus hogares.

Las informantes expresaron de modo recurrente la idea de tener un huerto o cría de animales en sus hogares. En algunos casos, refirieron que habían probado pero lo habían abandonado ante resultados poco fructíferos por plagas, problemas con el suelo, presencia de perros sueltos que rompían los cultivos o mataban los animales de crianza. Entre las experiencias previas mencionadas, los cultivos correspondían a verduras de hoja, tubérculos y hortalizas (tomate, zapallitos, repollo, lechuga amarga, cebolla de verdeo, papa); o frutales (limonero y naranja de ombligo). Entre los animales de cría, se mencionaron gallinas, conejos y gansos.

Elaboración de productos alimenticios para la venta

Fue mencionada la elaboración de tortas y dulces para la venta en una UD, como recurso económico complementario para el hogar. Estos no eran producidos en forma regular, ni se mantenía la elaboración del mismo producto por mucho tiempo, sino que se encontraba asociado a la posibilidad de tener acceso a las materias primas para elaborarlos.

Estrategias de obtención de alimentos

El acceso a los alimentos en los sectores urbanos está fuertemente mediado por las políticas públicas, a través de influencias sobre la generación de precios y sobre los ingresos de la población y/o por las políticas asistenciales del Estado. Además la influencia del mercado también determina la capacidad de compra de las familias (Aguirre, 2004). A través de los relatos de las entrevistadas se pudieron puntualizar seis estrategias para la obtención de los alimentos, dos mediadas por el Estado y una por el mercado. Otras tres estrategias incluyen el contacto con otras instituciones y formas alternativas para la obtención.

Asistencia a comedores

Las entrevistadas del Barrio Obrero mencionaron sobre la asistencia a comedores comunitarios y copa de leche. Los días sábados de 17:00 hs. a 20:00 hs., se realizaban comidas (*guisos*, *polentas*) en el salón de usos múltiples del Centro Integrador Comunitario (CIC) para ser retiradas por las familias y ser consumidos en sus hogares. Estas comidas eran preparadas por vecinas del barrio que se ofrecían como voluntarias. Los días domingos por la tarde, otras vecinas organizaban en el mismo lugar una "copa de leche", donde se proporcionaba a los niños leche, yogurt, galletitas o jugo, mientras proyectaban una película o realizan actividades recreativas. También, se mencionó la asistencia a un comedor donde los integrantes de la UD retiran una vianda al mediodía para consumir en su hogar, los días martes y jueves.

En los tres barrios estudiados, la mayoría de los niños que asistían a los jardines de infantes o escuelas contaban con comedor incluido de lunes a viernes (desayuno y/o almuerzo y/o merienda). En ocasiones, si los niños no podían asistir por enfermedad u otro motivo, sus padres podían retirar la vianda y llevarla a su hogar. En cuanto a los alimentos ofrecidos en los comedores, se encontraron algunas discrepancias: algunas entrevistadas manifestaron que no eran del agrado de los niños o eran escasos, por lo que los niños volvían a comer en sus casas; mientras otras refirieron que los consideraban suficientes y "llenadores".

Alimentos obtenidos a través de planes alimentarios

Con la excepción de dos UD, todas recibían el beneficio del ***"Plan Más Vida"***, mediante el cual se les otorgaba a la familia la suma de 80 pesos (1 hijo menor de 6 años) a 100 pesos mensuales (en total por la familia, si tenía más de un hijo menor de

6 años)[9], a través de una tarjeta de débito, para la compra de productos comestibles en comercios adheridos al sistema. Este plan contaba además con la entrega de tres litros de leche fluida en formato sachet -por semana y por niño beneficiario-. La leche era retirada por las familias en los hogares de las "manzaneras", mujeres voluntarias del mismo barrio que representaban el primer eslabón de acción de este plan de asistencia estatal.

Esta leche era frecuentemente consumida en el desayuno o merienda por los niños del hogar. A veces sólo, la leche era utilizada y consumida en forma de postres (flanes, arroz con leche) porque era la única manera de que los niños ingieran. Ya fuera porque no les gustaba la leche en general o porque esa leche entregada por el plan no era del agrado del niño, enfatizando en la palatabilidad de la misma. También surgieron en los discursos algunas dudas respecto a la calidad de la leche proveniente de los planes alimentarios por lo cual no era ofrecida a los niños. En algunos casos este lácteo era entregado a otras personas de la familia o consumido por las mascotas del hogar.

Las UD recibían este plan hasta la edad de seis años de los niños. Sin embargo, en algunas ocasiones el vínculo con las manzaneras se mantenía luego de cumplida esa edad y ella les entregaba algunos litros de leche con frecuencia más esporádica, de acuerdo a la posibilidad de que les sobrara leche si alguien no retiraba.

Diez UD en los tres barrios contaban con un beneficio de $60 de carga mensual para compra de alimentos[10], proveniente las denominaciones locales ***"Tarjeta Celeste" o "Tarjeta Azul"*** (tarjeta de débito correspondiente al Plan Nacional de Seguridad Alimentaria, entregada a través la Secretaría de Bienestar Social del Municipio de Berisso).

Otro de los planes recibidos era el ***"Plan Materno Infantil"***, que otorgaba un kilo de leche en polvo fortificada a menores de dos años y era recibida mensualmente. Esta leche era consumida exclusivamente por los niños del hogar.

Las UD también recibían la ***"Asignación Universal por hijo"*** o la ***"Asignación Universal por embarazada"***. Se trataba del ingreso de dinero más importante, y si bien no estaba destinado exclusivamente a la compra de alimentos, buena parte del mismo se destina a ese fin.

Con respecto a la utilidad de la ayuda recibida, las entrevistadas mencionaron

9 En promedio la asistencia se encontraba cerca de los 15 USD y 19 USD, respectivamente. En el periodo de trabajo de campo (2011-2013) el precio del dólar fluctuó a razón de 1 USD por $3,99 a $6,49 (pesos argentinos). En promedio la ayuda de se encontraba cerca de los 15 USD y 19 USD, respectivamente.

10 Ver conversión en nota 5.

enfáticamente que si bien el dinero otorgado por la asistencia estatal no era suficiente para satisfacer todas sus necesidades colaboraba en la economía familiar. Los alimentos que podían adquirir con las tarjetas antes mencionadas duraban entre 3 días y 4 días.

Compra de alimentos

Las compras de alimentos secos y frescos, incluyendo frutas y verduras, se realizaban en general en los negocios cercanos al hogar y eran llevadas a cabo de manera semanal o incluso diaria. Estas compras generalmente cubrían una o dos comidas y podían realizarse en función del plato propuesto, aunque también se daban casos en los cuales se decidía qué cocinar mientras se hacían los mandados: la planificación de las compras era poco frecuente en las UD estudiadas. En la selección de alimentos primaban su calidad, en primer lugar, y su precio, en segundo lugar.

Dado el elevado valor de la carne vacuna, a veces la compra se hacía a mayor distancia, incluso en otras localidades, con el fin de equilibrar la relación calidad-precio o a la posibilidad de utilizar las tarjetas de los planes alimentarios en esos negocios. La búsqueda de descuentos para la compra de carne era destacada por las entrevistadas y mencionan que se comunicaban entre conocidos la ubicación de las ofertas.

En algunas UD algún miembro de la familia realizaba compras cerca de su lugar de trabajo.

Con menor frecuencia, se realizaban compras en grandes supermercados como “Día” (en el centro de Berisso) o “Carrefour” (en la ciudad de La Plata); o en mayoristas como “Carlitos” (en la localidad de Ensenada) o “Nini” (en la ciudad de La Plata). En estos espacios se adquiere “mercadería” seca (arroz, fideos, polenta, aceite, puré de tomate, etc.) y otro tipo de productos para el hogar. Si bien estos comercios no se encontraban en las cercanías, presentaban una diferencia de precios significativa para las UD en relación a la oferta de sus barrios. Estas compras solían tener una frecuencia quincenal o mensual, con el fin de abastecer un plazo mayor a la familia, pero dependían de poder disponer del dinero suficiente para justificar el gasto de traslado hasta el lugar. Para asistir a estos comercios se mencionó una organización entre personas conocidas -ya sean familiares, vecinos o amigos- para solucionar tanto problemas de distribución de los alimentos como de transporte hacia los centros de venta. La forma de pago, en general, se realizaba con los fondos de las *Tarjeta Verde* o *Azul* o de la Asignación Universal. En líneas generales, estaba complementada con las compras diarias a comercios cercanos y de menor tamaño.

En cuanto a las compras específicas con las tarjetas de débito de los planes alimentarios, se prefería comprar cerca del hogar por la posibilidad de adquirir elementos de limpieza para la higiene personal y del hogar, aspectos no contemplados dentro del Plan pero que las informantes refirieron como esenciales para el mantenimiento de una buena alimentación. Estas compras con tarjeta eran realizadas una vez por mes, coincidiendo con la fecha de carga de dinero en la tarjeta. Fue destacado por las informantes la posibilidad de adquirir lácteos, verduras, frutas y carnes, como así también de seleccionar alimentos de mejor calidad en relación a los alimentos que recibían cuando el Plan consistía solo en la entrega de bolsones.

"Cartoneo", "descartes" y donaciones

Las siguientes estrategias son alternativas y excepcionales para la obtención de alimentos. En una UD del Barrio El Carmen, el jefe de hogar trabajaba en relación de dependencia como camarero en un hospital de la zona y obtenía algunos productos comestibles de su espacio laboral. Según mencionó su pareja, llevaba a su hogar los "descartes" de alimentos que no eran utilizados en su trabajo, por ejemplo, las alitas de los pollos.

En Barrio Obrero, una UD se sostiene especialmente con alimentos obtenidos por el jefe de la familia durante el recorrido realizado en su trabajo informal de "cartoneo". A partir de su recorrida diaria donde recogía cartones en la ciudad, recibía de algunos comercios alimentos secos; carne picada, hamburguesas o restos de pollo y productos elaborados como pan y galletitas.

Una opción alternativa, pero muy poco mencionada, la constituyen las donaciones de alimentos. Una UD cuenta con el apoyo de una iglesia católica que una vez por mes les entrega una caja con alimentos secos, que incluye polvo para la realización de flan, leche, azúcar y entre otros productos. El dispensario Tettamanti, ubicado en las proximidades del hospital de Berisso en el centro de la ciudad, también es otra entidad mencionada por dos UD como espacio desde donde suelen recibir alimentos, en carácter informal.

Estrategias de redistribución de alimentos

Si bien la bibliografía hace referencia a la redistribución de alimentos como una práctica extendida entre familias de bajos recursos económicos, tanto en otros países de Latinoamérica como en Argentina (Aguirre, 2005; Lomnitz, 1975, 1994; Gerardth, 2003), tal característica no se fue observada con frecuencia entre las UD estudiadas.

Solo algunas entrevistadas mencionaron la existencia de préstamos de alimentos entre parientes o la redistribución de la leche obtenida mediante los planes -por falta de consumo o por observación de necesidades en las personas receptoras-. Por ejemplo, la leche que no era consumida por los niños se entregaba a los adultos mayores o a alguien de la familia con menores recursos.

Estrategias de consumo de alimentos

Comensalidad

La comensalidad es compartir la comida junto con otras personas, y se constituye como un espacio social donde se transmiten normas, reglas y símbolos (Fischler, 2011). Se trata de un evento social a través del cual se comparten conocimientos, gustos y tradiciones familiares, a través de diálogos que fortalecen la cohesión y vinculación entre individuos (Contreras, 1995; Fischler, 2011).

Las cenas se constituían como unos de los pocos espacios diarios de socialización en el cual compartían los alimentos todos los integrantes de la UD. Los horarios y actividades dispares de los miembros de la UD en los días hábiles de la semana, dificultaban las oportunidades para comer juntos. Generalmente sólo compartían el desayuno entre madres y sus hijos, aunque el tiempo se encontraba limitado debido a que los niños concurrían a la escuela. Muchas veces, cuando los niños desayunaban en el jardín o en la escuela primaria, el desayuno de la madre era nulo o muy liviano: solo consumían infusiones, como el mate. En la hora del almuerzo era común que los adultos se encontraran trabajando y los niños almorzaran en el jardín o la escuela. En estos casos, la comida de los adultos se realizaba en soledad, tanto en los trabajos como en el hogar, generalmente de forma muy liviana, con platos menos elaborados. Aunque a veces, y ocasionalmente, esas mujeres compartían algún almuerzo en casa de algún familiar cercano como padres o hermanos. Solo los fines de semana se presentaban como los días de encuentro para compartir todas las comidas del día, entre todos los miembros de la UD.

En nuestra cultura, la comensalidad sucede con frecuencia alrededor de una mesa (Aguirre, 2016). El espacio físico delimitado por la forma de la mesa es un espacio social y la disposición a su alrededor refleja y determina las relaciones entre ellos (Fischler, 2011). En el caso de varias de las UD estudiadas se observó que carecían de los recursos necesarios para cocinar, preparar y servir los alimentos, así como de muebles acordes para todos sus miembros (ausencia de una mesa y/o suficientes sillas). En otras UD, aunque contaban con estos recursos no compartían la mesa entre todos los integrantes del hogar: algunos comían en soledad en las cocinas mientras otros lo hacían las habitaciones, sobre la cama y/o mirando televisión. También se mencionó que en ocasiones aunque compartían la misma mesa y consumían la misma comida, el televisor solía encontrarse encendido y consideraban que la relación que podía establecerse en el momento de compartir los alimentos tendía a diluirse. Sin embargo, en términos de las entrevistadas, se realizaban intentos por mantener la comensalidad en el hogar, apreciándolo como espacio donde pueden encontrarse y compartir, aunque algunas prácticas como las mencionadas afectaran la posibilidad comunicarse.

Estos resultados se encuentran en coincidencia con los hallazgos de Aguirre (2005), la comensalidad se deteriora mientras progresa una alimentación solitaria y desestructurada saliendo del control de las normas culturales. A pesar de ello, compartir la comida, es decir la comensalidad, continúa teniendo valor y sentido (Aguirre, 2016).

Elaboración de las comidas, preferencias y adaptaciones para su consumo.

Las mujeres adultas eran generalmente las encargadas de elaborar las comidas que se consumían en la UD. Con menor frecuencia los hombres adultos, cocinaban los fines de semana o los días que contaban con franco en sus trabajos. También realizaban la elaboración de alimentos mujeres de menor edad de la UD.

Se mencionó como estrategia la preparación de comidas "para que sobre" para la cena o el almuerzo del día siguiente. Este "exceso" tenía muchas veces una razón económica, hacer que los alimentos rindieran más, pero también se debía que la madre no estaba siempre presente por razones laborales y dejaba a sus hijos la comida preparada para manejarse independientemente.

Entre las comidas usualmente consumidas, se destacaron como las más comunes y recurrentes: guiso (de arroz o fideos), fideos (con tuco, con manteca, al pesto), milanesas (fritas y de carne de pollo), estofado de carne o de pollo. Con menor frecuencia: pastel de papas, puré con salchichas, hamburguesas, tartas, hígado, sopas, polenta y diversos tipos de ensalada (de uno o varios ingredientes). En cuanto a postres algunas informantes mencionaron flan y arroz con leche, y en menor frecuencia frutas.

Según las entrevistadas, el consumo de carne era reducido debido al precio elevado, por ello algunas familia habían limitado el consumo de carne vacuna o carne blanca. El pescado apenas era consumido y de forma infrecuente. El corte más común de vacuno era el de la carne picada para hacer albóndigas o acompañar salsas.

El cuanto al consumo de pollo se mencionó en acompañamiento de arroz ("arroz con alitas") y en menor frecuencia pollo al horno. Durante épocas de mayor escasez alimentaria implementan mecanismos de sustitución de unos alimentos por otros o la introducción de nuevos. Por ejemplo, uno de los alimentos que sustituye o se complementa es la carne vacuna por huevo.

Con menor frecuencia se mencionó el consumo de asados, sólo durante los fines de semana y acompañados de grupos familiares que traspasaba el núcleo doméstico. Eventualmente se cocinaban pizzas y empanadas (carne o jamón y queso) caseras para ser consumidas los fines de semana.

Junto con las comidas, se menciona el consumo de bebidas como jugo en polvo, seguido por agua y bebidas gaseosas. En unos pocos casos se consumía jugo para diluir y jugo natural exprimido.

En cuanto al desayuno y la merienda, las bebidas más comunes eran la leche y el té. La leche, en polvo o en sachet, se correspondía con la recibida a través de los planes y podía acompañarse de cacao en polvo. Estas bebidas eran consumidas junto con pan o galletitas. En algunos casos mencionaron el consumo de bizcochuelos, "buñuelitos", "pastelitos", tortas fritas y galletitas de elaboración propia.

Para la preparación de algunas comidas se mencionaron algunas estrategias para introducir vegetales y carnes cuando a los niños no les gustan o porque "se cansan" de repetir los mismos platos. Frente a esto, se realizaban ciertas "preparaciones especiales" para lograr una dieta "lo más balanceada posible". Según estas mujeres, lo más determinante en el rechazo no era tanto el gusto sino el hecho de que alimentos como carne o vegetales fueran visibles en los platos. Para solucionar estas aversiones, optaban por cortar los vegetales o la carne en trozos muy pequeños o licuarlos para que se vuelvan indistinguibles en los platos, a fin de que los chicos no los vieran. Otra estrategia era hervirlos para poder ponerlos en las pastas. Por ejemplo, el hígado lo cortaban en trozos pequeños y lo servían con mucha cebolla o compraban hamburguesas de pollo con espinaca y hamburguesas de pescado con espinaca, para que los niños consumieran verdura y pescado (aunque tuvieran que hacerle creer que era pollo).

A muchos chicos no les agradaba la leche de modo que recurrían a estrategias alternativas para lograr la ingesta de lácteos: preparación de flanes (caseros y para preparar) y postres, incorporación de yogurt y queso para untar o manteca.

Cuando algún integrante de la UD presentaba problemas de salud que implicaba adaptación de la dieta se desarrollaban estrategias diferenciales. En una UD donde uno de sus miembros padecía diabetes, se preparaban alimentos sin grasa ni harinas y el resto de los integrantes se adaptaba a la dieta de la persona afectada. En otro caso, donde uno de los integrantes presentaba hipertensión y ante la resistencia de esta persona a recibir alimentos diferentes, se realizaban, en forma oculta, preparaciones diferentes sin sal para que "no se dé cuenta". En cuanto al sobrepeso o problemas como el colesterol alto, se mencionó el esfuerzo por cambiar los hábitos alimentarios de toda la UD a fin de solidarizarse con quienes padecían estas enfermedades y en otros casos sólo refirieron la responsabilidad del cambio de hábitos a la persona que padecía la afección.

DISCUSIÓN Y CONCLUSIONES

El propósito de este artículo fue abordar el fenómeno alimentario a través de las estrategias cotidianas realizadas para la obtención, producción, distribución y consumo de los alimentos en unidades domésticas beneficiarias de planes alimentarios en el Municipio de Berisso (Provincia de Buenos Aires). Se focalizó fundamentalmente en las formas de organización planteadas en estos contextos, el lugar que ocupan los planes alimentarios dentro de estas estrategias, los actores sociales involucrados y las relaciones establecidas, tomando en cuenta especialmente las conexiones que ocurren por fuera de la unidad doméstica para identificar el involucramiento de distintos sectores o niveles.

El análisis de las entrevistas a partir de un enfoque analítico cualitativo proporcionó una caracterización de las estrategias vinculadas a la alimentación en las UD de Berisso. Estas descripciones se vincularon estrechamente con los datos provenientes de las investigaciones en otros contextos urbanos similares en Argentina (Eguía, 1992; Ortale, 2002; Aguirre, 2005). En las estrategias vinculadas a la alimentación de las UD estudiadas, influyó de sobremanera la situación económica de dicha unidad. La obtención de gran parte de los alimentos se realizaba mediante el dinero proporcionado por los programas estatales. Las compras para abastecimiento de alimentos, tarea generalmente femenina, se realizaban en forma diaria en comercios que se encontraban cercanos al hogar (supermercados, almacenes y carnicerías). La elección era realizada generalmente por las mujeres, privilegiando el gusto y la calidad, pero considerando los presupuestos disponibles. Esto concuerda con lo que plantea Patricia Aguirre: "la gente no come lo que quiere, ni lo que sabe, come lo que puede"

(Aguirre, 2004, p. 31). En cuanto a las estrategias de utilización de programas alimentarios del Estado, la infrecuencia de intercambio de alimentos entre parientes, vecinos y amigos; y la rareza en la producción de alimentos, los resultados obtenidos coincidieron con los hallados por Ortale (2002) para el Gran La Plata.

Las estrategias alimentarias en estas UD de Berisso se configuraron y articularon en un escenario donde el acceso a los recursos se encontraba restringido. Sin embargo, el despliegue de diversas actividades permitió, de alguna manera, garantizar la llegada de los mismos a la UD. A partir de los relatos proporcionados por las entrevistadas se pudo apreciar el movimiento por distintos espacios de acción y el contacto entre distintas personas, mostrando la dificultad de comprender el desarrollo de las estrategias considerando solamente la escala individual y/o doméstica y demostrando el alcance colectivo de las mismas (Lomnitz, 1975; Garrote, 2003).

Trascender los relatos y profundizar en los contextos relacionales permitió comprender el desarrollo de estas estrategias con mayor claridad, analizando la forma en que el contacto con otras personas facilitaba y/o fortalecía la posibilidad de consumir, obtener o distribuir los alimentos. A partir de la información obtenida, se observó que las estrategias resultaron fundamentalmente endógenas, involucrando mayormente a miembros de la familia y, en menor medida, a otros miembros de la misma comunidad. Sin embargo, fue notable la reducida participación de compañeros de trabajo, amigos y vecinos; lazos que se encuentran con fuerte presencia en otros estudios realizados en contextos urbanos y de pobreza muy similares (Lomnitz, 1975). En cuanto a los actores institucionales, como las "manzaneras", frecuentemente tomaron un rol pasivo y complementario para la alimentación desde la perspectiva de los entrevistados.

Otra característica que pudo observarse, es el protagonismo del género femenino para el desarrollo de las estrategias en estas redes vinculadas a la alimentación. Estos resultados coinciden con Garrote (2003): el rol tradicional del principal proveedor se desplaza del género masculino al femenino, organizando la obtención de alimentos más allá del círculo doméstico "ingresando al ámbito público a través de la tramitación y gestión de diferentes oferentes de ayuda alimentaria formal, en forma individual o colectiva: en centros de salud, programas alimentarios, iglesias, etc., transmutando normativas, códigos y prácticas establecidas desde los modelos patriarcales y posibilitando de este modo formas más efectivas de reproducir su existencia y la de su grupo familiar" (Garrote, 2003, p.133).

Los resultados obtenidos permitieron una aproximación al conocimiento de las relaciones sociales en torno a la alimentación en sectores de escasos recursos económicos de la localidad de Berisso, configurados en un contexto de gran complejidad donde se vincularon las UD, las instituciones de salud y religiosas, el mercado y los organismos del Estado. De esta manera, se mostró que las estrategias trascendieron las UD, foco de las políticas estatales. Sin embargo, sólo en muy pocas ocasiones se extendió más allá de la escala local por motivos de tipo económico, relacionales y/o confianza.

La situación de vulnerabilidad alimentaria hoy permanece y se recrudece: en los contextos actuales las UD continúan con características similares y las carencias alimentarias superan los datos referenciados en este texto (Sánchez y Tuñón, 2019). Para paliar estas deficiencias el gobierno argentino ha implementado desde los primeros meses del 2020 el Plan Argentina contra el Hambre[11], que contempla un plan de acción y de detección temprana de problemas nutricionales y alimentarios. Es por ello, es que se evalúa la vigencia de estos resultados y la posibilidad de hipotetizar acerca de la utilidad de análoga de este estudio en esta nueva política pública. En este sentido, se considera que esta información puede resultar de utilidad para realizar mejoras en el diseño y la gestión de los programas alimentarios focalizados estas poblaciones que resulten acordes a sus características colectivas y organizativas como las descriptas en el trabajo etnográfico presentado. Por otro lado, sería esperable que las políticas ajustaran sus programas a través del uso de los datos que surjan de un monitoreo permanente de las dinámicas localmente situadas, que deriven de estudios micro-sociales, contemplando los procesos de cambio que ocurren en los contextos socioculturales barriales.

11 https://www.argentina.gob.ar/argentinacontraelhambre. Dentro de dicho plan se incorpora la Tarjeta Alimentar, para beneficiarios de Asignación Universal por Hijo, consistente en un monto de dinero adicional destinado a la compra de alimentos, que privilegia su utilización en canales de comercialización de economía social, regional y popular.

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A Communication for Development Approach to Eradicating Polio: India Succeeds. Research-Driven Outreach, Extension & Interpersonal Strategy

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Abstract

Communication for development (C4D), has been identified as a major factor in eradication of Polio in India. India has been hailed as a success as it saw innovative use of epidemiological data and application of multiple communication channels, especially for the Polio eradication programme. It has also been perceived that communication for Polio eradication has mostly promoted Polio-vaccine drops whereas the main causal factors such as low rates of routine immunization, poor sanitation, lack of clean drinking water, and poor nutrition that are responsible for spread of Polio virus have not been promoted have not been promoted as the behavior-change content. The research was held in sub-urban clusters around the capital city of Delhi inhabited by migrants from two Indian states. The research documented that the knowledge and perceptions of large number of communities are very low with regard to recalling any causal factors which lead to Polio transmission. Research concludes, for behaviours to change, that cultural taboos, societal norms and structural inequalities need to be taken into consideration, including special emphasis on migrant settlers. Communication strategies have to be cognizant of and in tune with the policy and legislative environment and also linked to the service delivery aspects for the most vulnerable and socially-excluded.

Keywords: Polio eradication, Immunization, Child survival, Risk factors, C4D (Communication for Development), Strategic communication, SBCC, India.

Uma Abordagem de Comunicação para o Desenvolvimento na Erradicação da Poliomielite: a Índia como um Caso de Sucesso. Divulgação, extensão e estratégia interpessoal

Sumário

A comunicação para o desenvolvimento (C4D) foi identificada como um fator importante na erradicação da poliomielite na Índia. A Índia foi aclamada como um caso de sucesso, pois conheceu a utilização inovadora de dados epidemiológicos e a aplicação de múltiplos canais de comunicação, especialmente para o programa de erradicação da poliomielite. Também se percebeu que a comunicação para a erradicação da poliomielite promoveu principalmente a queda da vacina contra a poliomielite, enquanto os principais fatores causais, como baixas taxas de imunização de rotina, falta de saneamento básico, falta de água potável e nutrição inadequada, responsáveis pela disseminação do vírus da poliomielite, não têm sido promovidos, enquanto conteúdo da mudança de comportamento. A pesquisa foi realizada em aglomerados suburbanos em torno da capital Delhi, habitada por migrantes de dois estados indianos. A pesquisa documentou que o conhecimento e as perceções de um grande número de comunidades são muito baixos, em relação à recuperação de quaisquer fatores causais que levam à transmissão da poliomielite. A investigação concluiu que, para que os comportamentos mudem, é necessário ter em conta tabus culturais, normas sociais e desigualdades estruturais, incluindo uma ênfase especial nos colonos migrantes. As estratégias de comunicação devem estar cientes e sintonizadas com o ambiente político e legislativo e também vinculadas aos aspetos de prestação de serviços para os mais vulneráveis e excluídos socialmente.

Palavras Chave: Erradicação da Poliomielite, Sobrevivência infantil, Fatores de risco, Comunicação para o Desenvolvimento (C4D), SBCC, Índia.

1. CONTEXT

Effective Communication is one of the most powerful 'vaccines' that prevents communities from various dreaded diseases, including Polio. Strategic use of communication has been recognized as a major factor in eradication of Polio in India (Gupta & Bansal, 2014). This is more so as it has been realized that the planned communication strategy was instrumental in following and implementing sustainable steps to eradicate Polio in India. The country has been particularly hailed as a success as it saw innovative use of epidemiological data and application of multiple communication channels, both, the known and the newly innovated, especially for the Polio eradication programme. However, it has also been perceived that communication for Polio eradication has mostly promoted Polio-vaccine drops whereas the main causal factors such as low rates of routine immunization, poor sanitation, lack of clean drinking water, poor nutrition etc. responsible for spread of Polio virus have not been promoted as behavior-change content. Hence, the knowledge and perceptions of large number of communities, even those who are regularly administering the Polio vaccine drops, are very low with regard to recalling any causal factors which lead to Polio transmission. The primary message of the current Polio Communication strategy is 'promotional' in nature that markets the use of Polio vaccination, without imparting ample knowledge to communities on various causes of Polio spread among children.

Emerging from the roots of Expanded Programme on Immunization (EPI), the Polio Eradication Programme had a series of mixed lessons in vaccination, surveillance and communication. In view of severe lack of substantial cadre of field-mobilizers and committed Polio vaccinators in the initial years, the Polio programme engaged in a massive exercise of developing such trained human resource and mobilized partnerships to support it. It remained a challenge particularly in the two large endemic States in the northern India, i.e. Uttar Pradesh and Bihar. Nevertheless, the migrants from the endemic areas who mostly settle in the urban clusters of many major metro cities, such as NCR of Delhi, continue to serve as major risk-factors for Polio transmission.

A micro study was planned to ascertain whether the current communication and social mobilization interventions were designed based on specific-community needs and existing risk-factors. It was also felt worthwhile to examine whether the current communication content and approach covered all the major risk-factors in polio virus transmission or was it limited to 'product marketing' approach for OPV. Such an analysis was aimed to contribute to the overall communication planning so that the country continues to be vigilant and renews her strategy and energies in implementation of its Polio programme.

2. AN OVERVIEW OF THE POLIO VIRUS IN INDIA

In the 20th century India, Polio threatened children across cities, towns and villages; no state was free of the crippling disease. The gravity of the problem was reflected in the astonishing figures of 1978 when 150,000 Polio cases were reported from across the country (Gupta & Khera, 2010). By 2008/2009 India saw a sharp 99% decline in Polio cases; however, the last mile journey was tough to make the country 100% Polio free. The last wPV_1 (Wild Polio Virus-1) case was detected in Howrah/ West Bengal in January 2011 and thus, in March 2014, WHO certified India as a Polio-Free nation. Despite attaining the certification of a polio-free nation, the high-risk continued not only because of the risk of importations from neighbouring countries, especially Pakistan and Afghanistan, but also as the 'enabling risk factors' like poor routine immunization, poor sanitation, high incidences of diarrhea and poor nutrition among children below 5 years still continue to pose a major threat in India.

Vaccination against Polio started in 1978 and it was integrated with the Expanded Program in Immunization (EPI). By 1984, it was successful in covering around 40% of all infants, giving 3 doses of OPV to each child through tPV (trivalent polio vaccination). In 1985, the Universal Immunization Program (UIP) was launched to cover all the districts of the country, which too had polio vaccination integral to it. UIP became a part of child survival and safe motherhood program (CSSM) in 1992 and Reproductive and Child Health Program (RCH) in 1997. In 1995, following the Global Polio Eradication Initiative of World Health Organization (1988), India launched a full-fledged Pulse Polio Immunization Program along with the Universal Immunization Program which aimed at 100% coverage and subsequently it achieved 95% coverage (Brooks & Khan, 2007). The number of reported cases of polio also declined from 28,757 during 1987 to 3,265 in 1995 and less than 200 (wPV_1 & wPV_3) in the year 2009 (Jacob, Shah, & Thacker, 2009). With just one case in 2011 and none after it, India has been free of Polio cases since then.

3. POLIO COMMUNICATION STRATEGY

A large number of studies have revealed that communication and social mobilization are imperative for the success of a development project (Gupta, et al., 2018). Health communication for Polio campaigns encompass strategies for producing effects on the knowledge, attitudes, and behavior of large populations across a variety of domains, including political, social, environmental, and health outcomes. Public health communication campaigns can be broadly defined as purposive attempts to inform, persuade, or motivate behavior changes in a relatively well-defined and large audience. This is generally for non-commercial benefits to the individuals and/or society at large, typically within a given time period. It is through means of organized communication activities involving mass and online/interactive media, and often complemented by interpersonal support.

During late nineties and the beginning of 2001, the path ahead for this communication effort hinged on whether knowledge, attitude and behaviours were given a place they deserved in an initiative dominated largely by epidemiological variables for the disease eradication. The underserved communities – putting aside a resistant attitude and factors that shaped it – were by their economic and social conditions, a group that fell on one end of the normal distribution curve. In the context of Diffusion Theory, they belonged to the laggards in a chained development of behavioral adoption, where no amount of general media outreach, publicity efforts, could induce adoption of a new practice unless extraordinary efforts were made. The Social-Mobilization Network (SMNet), through an aggressive interpersonal communication approach, had demonstrated that such behaviour-practice changes were after all possible.

Keeping these factors in view, the Polio programme strategy evolved over the years and focused on the vulnerable populations. To immunize children on the move, transit vaccinators were positioned at bus stands, train stations, on trains, market places and important road intersections. At a given point in time, over 10 million children were immunized by the transit teams in each polio campaign, of them over 100,000 on trains. Focusing on the migrant population, the people on the move in search of livelihood who miss polio immunization in view of their transient nature, the programme covered 70,000 brick kilns and 38,000 construction sites (UNICEF KAP Study 2010/11).

It is evident that the health communication strategy for polio eradication has achieved a major milestone in a short-term perspective. It is noteworthy that the current health communication content, by and large, does not include primary causal risk-factors that actually enable Polio virus transmission; instead it emphasizes sustained practice of OPV. Synergistic communication activities integrating social mobilization, interpersonal communication, gender and culturally sensitive interventions, mass/folk media and political advocacy have greatly contributed to the overall success of the Polio programme and have helped in accessing the unreached and vulnerable population groups in India, especially with a fluctuating, diverse and challenging socio-economic environment. Needless to mention, the strategic and innovative Polio communication can contribute to other public health programmes and initiatives including reaching out to the vulnerable, hard-to-reach and poor sections of society.

4. RATIONALE FOR THE CURRENT RESEARCH

The area of health communication research focuses primarily on the application of communication theory, concepts, and strategies for enhancing public health services, and in fostering better understanding on how such processes work. The approaches are numerous and represent significant scholarship across bio-psycho-social levels of analysis. Research can range from how individuals cognitively and emotionally process individual health-related messages to social and cultural contexts that influence how health campaigns are implemented. It can include targeted messaging through mass media or interpersonal communication between client/patient and health-care provider. In the last decade, health communication research on issues involving new-age media and technology has also emerged. In brief, health communication research represents efforts from two perspectives: (a) from the field of public health and (b) from the field of communication. Although both the specialized areas are interested in improving overall public health as a general goal, communication scholars emphasize appropriate theory and effective processes, while public health emphasizes health outcomes. Most recent advances in health communication are integrating these two approaches. This research was positioned in a manner, so as to contribute to the strategic communication framework wherein the National Polio Eradication programme could re-visit and strategize its communication efforts with critical emphasis on Polio-virus high-risk areas in the sub-urban clusters in India.

5. THEORETICAL AND CONCEPTUAL FRAMEWORK: HEALTH COMMUNICATION FOR POLIO ERADICATION

For the study, Communication for Development (C4D) framework was used that encompasses the Social & Behaviour Change Communication (SBCC) strategies. The communication interventions under the current programme, when technically studied at various stages of their evolution, were found employing three primary theoretical conceptual frameworks in strategic health communication, namely: **Theory of Diffusion of Innovations** (Rogers, 2004); **Theory of Planned Behaviour** (Ajzen, 1991); **Stages of Change Theory** (Prochaska & Norcross, 2001). And an overarching approach derived from the **Socio-Ecological Model** played a common denominator of communication design under the communication for Polio Eradication initiative. These conceptual models would serve as common denominators at various stages and levels of the intended health communication interventions under the Polio Programme.

6. RESEARCH DESIGN

The research was designed to make an assessment of the on-going polio eradication campaign, with specific focus on select clusters in NCT of Delhi as a high-risk population, within the context of communication to suggest appropriate communication strategies for Polio eradication. Hence, the field research was kept at both the levels, i.e. quantitative data and qualitative assessment, wherein the triangulation helped in analysis and conclusions.

7. OBJECTIVES OF RESEARCH

Within the context of the overarching goal of the study, specific objectives of the research were: (i) examine the on-going communication and vaccination efforts being made by the Govt. and the development partners in achieving the goal of Polio eradication from India; (ii) analyze the prevailing perceptions of communities ('at-risk/migrants' settlers) regarding acceptance of Oral Polio Vaccination (OPV) and the associated risk-factors responsible for Polio transmission and; (iii) identify appropriate communication content, platform, mode and frequency, so as to develop a strategic framework for communication.

8. RESEARCH QUESTIONS

Keeping in view the objectives of the research, the following questions were posed to guide the study:

1. What was the media access and media utilization patterns of the respondents in the study area?
2. What were the sources of health related information of selected respondents?
3. What was their level of awareness, attitudes and practices on the associated health practices which are a key to prevention of Polio virus transmission: Routine Immunization, Exclusive Breastfeeding, Diarrhea Management, Water, Sanitation and Hygiene?
4. Was the communication-content of the Polio programme enabling the respondents in understanding the mode of virus transmission?
5. Was the level of awareness and attitude of the respondents leading them to practice continued Polio vaccination?

9. METHODOLOGY

The research methodology included both qualitative and quantitative methods of data collection from three sub-urban clusters of Delhi, India - largely inhabited by migrant population groups from polio-endemic States, i.e. Uttar Pradesh and Bihar. The quantitative data was collected on a structured interview schedule specifically designed for the purpose which was administered to the respondents in the study area. The qualitative data was collected through Focus Group Discussions spread over three FGDs and the findings were derived based on both the modes of data collection.

10. SAMPLE SELECTION

The respondents in the study were women at the household levels, who largely represented migratory settlers from the high-risk and Polio endemic States in India and who were caregivers to children under 5 years of age. Multistage sampling procedure was followed for drawing a sample of 200 women for administering the personal interview schedules. Stage -1: Selection of Urban Clusters in the NCT of Delhi; Stage-2: Selection of Households; Stage-3: Selection of Respondents.

11. PREPARATION OF RESEARCH INSTRUMENT

Keeping in view the objectives of the study and the key research questions, an interview schedule was designed to conduct personal interviews with a sample of the respondents in the selected three localities in Delhi. The set of questions were prepared to elicit responses on the following key variables:

- **Socio-demographic profile** (age, gender, religion, caste, educational level, occupation, area of residence, type of settlement, income level, etc.)
- **Media Access and Exposure** (reach and availability of radio, television, posters, print-media, usual media habits and media utilization patterns)
- **Sources of Health Polio related information** (Electronic media, newspapers, posters, Health Workers, Political Leaders, Religious heads etc.).
- **Awareness, Attitude and Practices on the following focal areas**:
    - Polio
    - Routine Immunization
    - Exclusive Breastfeeding
    - Diarrhea Management
    - Water, Sanitation and Hygiene

The interview schedule consisted of both closed and open ended questions spread over eight sections. The relevance and utility of each item was carefully assessed before inclusion in the schedule. The draft schedule was translated in Hindi and pretested on 10 women randomly selected in an urban resettlement area. Based upon the feedback received, the instrument was modified and the finalized interview schedule was administered subsequently.

12. FOCUS GROUP DISCUSSIONS (FGDS)

Under the current research, FGDs were used to find out how people respond in a group, how their feelings and opinions can be shaped by the experience of discussing the subject with others. The purpose of this discussion was to stimulate the participants reveal underlying opinions, beliefs, attitudes and reasons for their existing behaviour. Three FGDs comprising 12-14 respondents were conducted in the given three urban clusters of the NCT of Delhi. These FGDs were conducted subsequent to obtaining the primary findings through the quantitative survey and key protocols of conducting the FGDs were adhered to.

13. SCOPE OF THE RESEARCH STUDY

The scope of the study was limited to three settlements of sub-urban clusters of Delhi State in India (North West, South West and West of Delhi) and there may be region/area wise variations. Data was collected from women respondents who were caregivers of the young children of below the age of 5 years. The issues of Routine Immunization, Exclusive Breastfeeding, Diarrhoea Management, Water, Sanitation and Hygiene that have important bearings on success of Polio eradication campaign were included as key variables and other health issues were not covered. The research focus was, however, limited to the communication aspects only; health-logistics, epidemiology or public-health surveillance aspects were not included in the research study.

14. PRIMARY FINDINGS OF THE RESEARCH

Profile of the Respondents:

The respondents of the research were caregivers, i.e. mothers or grand-mothers. They were between 15 to 55 years of age categorized in three age groups; nearly 70% belonged to 26 to 35 years age group. 75% of them were Hindus; 20% Muslims and 5% belonging to other faiths. Majority of them (72%) were 'other backward classes', while 15% belonged to scheduled caste and schedule tribes. 76% worked outside homes as housemaids, business establishments, stuffing toys, bangle making etc. All lived in concrete houses, most comprised just one room inhabiting the entire family. Nearly 70% had at least one child in 0-5 year age group.

Media Access & Exposure:

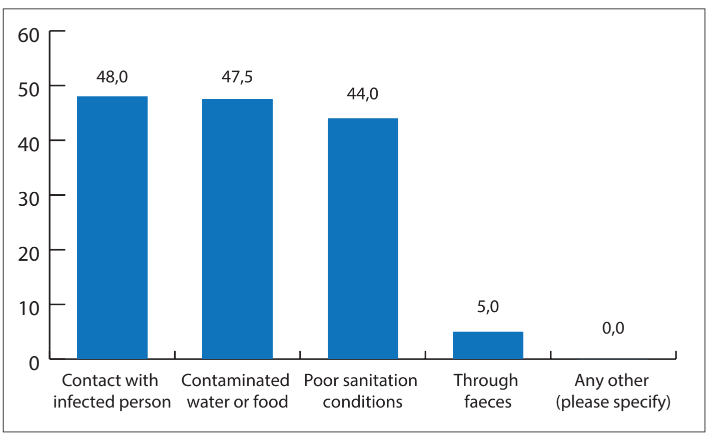
TV and Radio were found as the most accessible mediums. Most respondents admitted "seeing or hearing" about Polio on the electronic media. Only a quarter of respondents reported accessing Newspapers which on further probing implied that old copies of magazines and newspapers spread on their racks and tables were accorded as "access", not essentially attributing to a regular reading habit. Daily exposure to radio was reported by 38.6% respondents and television by 68%; while once or twice a week exposure was reported by 61.3% (Radio) and 31.4 % (TV) respectively.

Awareness about Polio Virus

The study found 100% respondents aware of Polio as a disease among children. Among them, 73.2% reported getting Polio related information, specifically regarding 'announcements of Polio vaccination rounds' through media. However, some respondents, who 'claimed' to have known the causes and source of polio transmission had incomplete or incorrect knowledge (Fig. 1). It was perceived as a 'communicable disease' which spreads through person-to-person contact (48%) as is shown in figure 1. Barely 5% of respondents could recall the correct mode of polio virus transmission.

Figure 1

How is Polio Spread?



Sources of Polio related Information

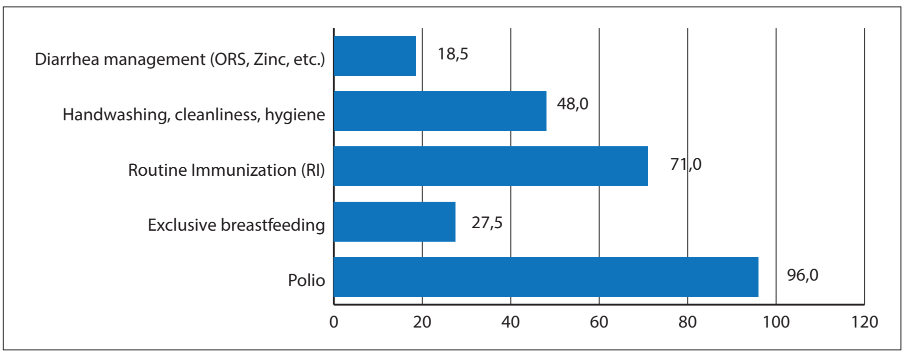
Most respondents reported getting information on Television (88.7%) as the primary source of information on Polio. However, the information which they gathered on Polio was largely (73%) about announcemnets on the NIDs, SNIDs and the mop-up rounds. It did not contain information on Polio prevention, sources of infection etc. Health workers, the second most popular source was reported by 61.5% of respondents.

Reliance for Health Information

In a multiple response question, 63.5% respondents reported reliance on visiting health workers/social cadre for health related messages, especially Polio vaccination, routine immunization, sanitation and nutrition while 54% respondents mentioned electronic media channels, Radio and TV, as their main source of knowledge about Polio programme.

Figure 2

Purpose of Visit of Health Worker



Weak Interpersonal Linkages

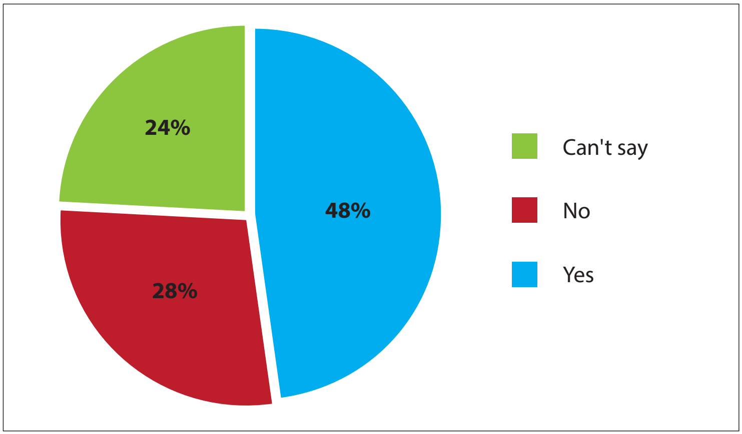
Almost all the respondents claimed that the Health/Social workers visited their homes during the last one month and shared information on health related issues. As demonstrated in figure 2, mostly they talked about Polio (96%), routine immunization (71%), hand washing and cleanliness (48%). However, upon further analysis it was found that the health information given by the providers, largely the vaccinators, was weak in substance and did not encourage the community to practice adeherence to routine immunization, exclusive breastfeeding or even mainatining good sanitation health behaviours. Most emphasized health message given by the visiting providres was on the need for continuous Polio vaccination, if and when announced by the

Government. They did not share knowledge on any risk-factors that lead to spread of polio virus among children, as the most vulnerable group.

Respondents' Perception on Curability of Polio

The respondents were further questioned whether or not Polio was curable and nearly half (48%) of them thought that Polio was curable (Figure 3). About 28% respondents correctly responded that it was incurable, another 24% were not sure whether or not Polio could be cured once a person was afflicted with it. Of those who were of the view that Polio could be cured thought that it could be cured through surgery (75%), medicine (42.7%) and Polio vaccination (41.7%). Further probing revealed that a large number of respondents in the study area were ignorant about the fact that once polio inflicted a person, the disease can not be cured by surgery or medicines. This may partly be due to their understanding that OPV was a 'medicine'.

Figure 3
Can Polio be Cured?

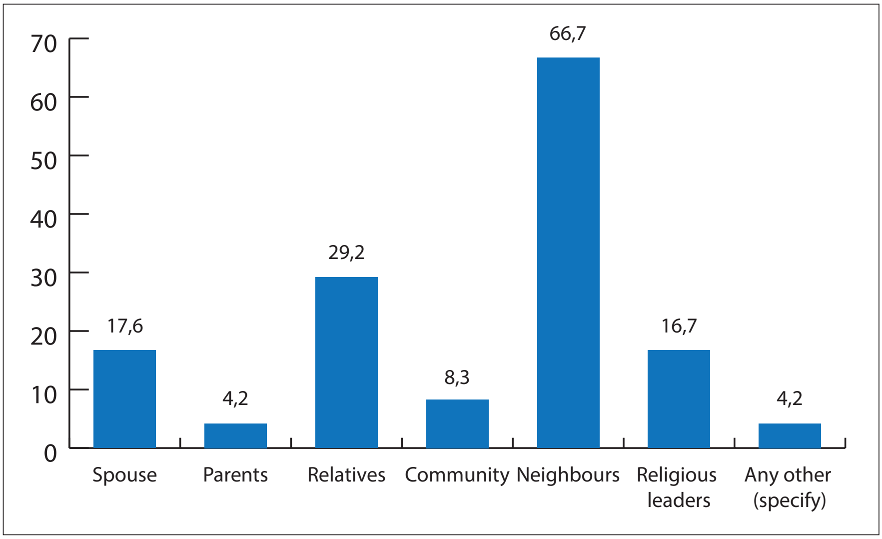


Respondents' 'Risk perceptions' about Children in Community

When questioned on whether Polio can affect children in their community, nearly half of the respondents (51%) were unsure, a third said that it can, while 16% said that Polio cannot affect the children in their community. Further probing and analysis showed that these responses were reflective of a poor understanding of Polio; its causes, spread, cure and the risk factors invovled.

The findings stressed the need for clear, concise and appropriate communication on the threat perceptions of the Polio virus by using innovative and suatined IPC methods complemented with use of electronic media campaigns.

Figure 4
Sources of Discouragement



Discouragement to take OPV

A high majority (76%) of the respondents reported never been discouraged to give OPV to their children, while 24% of them mentioned that they were on some occasions discouraged and were advised not to go for OPV for their children.

Those who reportedly had been discsouraged (Figure 4), attributed this to their neighbours (67%), relatives (29%), spouse (17%) or relegious leaders (17%) as the main persons. Of those (67%) who were discouraged by neighbours in continuing with Polio vaccination drops; upon further analysis, it was found that only 2% adhered to such an advice. Hence, the rest of the 65% respondents continued with the Polio drops for their children under 5 years of age and the majority of those who discontinued Polio drops were found belonging to a particular community. This was largely because of the lack of proper communication at various levels for removing the misconceptions from the minds of people.

It is noteworthy that various KAP studies and Polio surveillance reports also corroborated that various myths, rumors and misconceptions about the Polio vaccination, such as pertaining to male impotency etc., mostly affected certain communities.

Looking from a broader perspective, these 2% may have a large impact on the number of ultimate refusals by further convincing their neighbours and family, while also increasing the risk to entire neighbouring populations through their unimmunised children.

Poor Handwashing Practices: Enabling Virus Transmission

As regards washing hands with soap and clean water, 61% of the respondents said that it was important; a significant percentage (31%) were not sure while 8% felt that it was not important. Of those who said it was important, 61% of the respondents said that it was important to wash hands after defecating, 32% said it was after washing a child's bottom while 18% said before eating and 12% observed before cooking in the kitchen respectively. From the perspective of Polio programme and Polio transmission, this is an alarming state of health-behaviour as such practices may lead to Poilo virus back in circulation. This is more so as the Polio transmission route of oral-fecal is largely contained through sanitation and hand-washing practices and, a single 'missing-link' in the prevention cycle could lead to a major epedemic of virus spread again.

Lack of knowledge and inclination for Routine Immunization

A large majority (88%) of the respondents had an RI (routine immunization) card, out of them 40% had also used it in the past 2 months. However, the rest of the respondents had not used the card for a long time - only 10% of the respondents had used it between the last 2 months and 3 years period, while the rest of them had used it more than 3 years ago. This may indicate a high dropout rate, whereas these findings also partly explained the low rates of RI reported through the national data. The key observation that can be made from these responses was that while most people have had knowledge and the will to immunise their child, they were not practicing it - perhaps due to lack of access to acceptable RI centers and due to insuffcient knowledge of RI schedules at their local centers.

Missed Polio Vaccination

None of the respondents knew the harmful effects of missing a round of the Polio drops. When questioned on what must be done if a child missed a dose, a majority of respondents (77%) said that one should take the dose from any nearest health center, while a large majority (64%) said that one should do nothing as they would anyway get it in the next dose. This may be due to the high frequency of immunization rounds, which may have had led to the parents and caregivers believing that a few missed doses did not make a difference. These findings were reflective of the lack of clarity about how the Polio virus spreads and what could be done to prevent Polio transmission. Therefore, there is a strong need for focused communication population, particularly women, the, the caregivers of young children, about the correct causes of Polio and the steps necessary to prevent the spread of virus.

15. RESULTS FROM THE FOCUSED GROUP DISCUSSIONS

Radio and TV were found as the most accessible mediums to the respondents, wherein most members of the FGDs admitted "seeing or hearing" about Polio on the electronic media. However, most public-health promotion is done through the public-broadcaster (All India Radio), whereas the discussions found that most people largely access private FM stations. Similarly, the majority of respondents had access to Television but the public broadcaster (Doordarshan) was found as least watched, since all the respondents of the FGDs had full access to cable or dish TV connections. It stresses the need for a focus on Audio/Visual communication of messages on public-health issues, with emphasis on private channels in the urban settings. This is also relevant in the context of 'non-literate' populations, for whom AV communication can be the most effective method of communication.

It was found during discussions that the usage of words such as '*polio ki dawaa*' i.e. the polio medicine in the national Polio eradication programme has led to widespread misconceptions regarding the vaccine, wherein people believe it '*capable of curing Polio*' as opposed to merely playing a role in preventing Polio. When probed further on continued Polio vaccination for protecting children against the virus, most respondents in the group considered that OPV vaccination has a 'medicinal' effect on Polio 'germs' in the child's body. Therefore, from the communication perspective, the campaign's tag-line of *polio-ki-dawa-pilana (administering the polio medicine)* has managed to enhance knowledge about Polio vaccinations, but the lack of knowledge on virus's transmission routes were found as primary gaps.

The respondents argued that none of the messages on routine immunization and Polio vaccination were disseminated through Panchayat level leaders (locally elected leaders) or Municipal Councilors, though the National Programme has laid significant emphasis on this intervention. Hence, in these clusters the local leaders were not found serving as change-agents in this research inquiry.

Almost all the FGD participants had relatively high knowledge on issues of exclusive and early breastfeeding and diarrhea management/ORS, yet the FGDs recorded low levels of practices. Twice during the FGDs, women raised the issue of lack of access to clean water for drinking, hand-washing etc., resource crunch in accessing health services and even lack of 'voice' to register their complaints. Therefore, the vulnerability to diseases such as Polio could also be well corroborated to the state of poverty.

16. CONCLUSION

The current research was aimed to assess the communication-connect of the national polio campaign with the people, especially on the high-risk migrant settlers in the sub-urban clusters of national capital territory of Delhi. It examined, through a strategic mix of quantitative and qualitative methodologies, how the caregivers and/or mothers of children under 5 years of age perceive Polio vaccination, associated risks, and how correctly they knew about the actual prevention methods. The research concluded that the **Communication-content** under the Polio Eradication programme was exclusively promoting Polio vaccine, without inclusion of the risk-factors that lead to transmission of the virus. Therefore, the content should not be restricted to only OPV promotion in communities; in addition, it must also emphasize on other associated risk-factors that were responsible for polio transmission. The majority of respondents, who migrated from various adjoining States for livelihoods and lived in these select clusters, did not access government-owned broadcast media, i.e. Doordarshan (TV) and All India Radio. Instead, their media habits indicated frequent access to private FM radio stations and private satellite TV. Therefore, the government and polio programme partners **should not restrict health promotion strategies by largely using public-broadcasters**, rather such key messages should preferably be disseminated through private sector electronic media too, especially in Urban, Sub-Urban clusters and Metro cities across the high-risk areas.

In the selected urban clusters, a significant gap of IPC (interpersonal communication) was apparent between 'providers' and 'clients' under the Polio programme.

A more focused and **community-owned interpersonal communication** (including counseling) should be made integral to the strategic health communication. Similarly it was concluded that knowledge about the causal factors leading to Polio transmission was missing among the respondents in the urban clusters' communities, the 'health-seeking' behaviour (demand for OPV) was found weak. So was the weak 'supply' factor i.e. regular access to social-mobilizers and vaccinators. Hence, the demand-generation strategies (through strategic health communication) and the associated supply-chain services (quality, affordability, safety and accessibility) should be well matched by the programme managers, i.e. **Programme Convergence and Coordination in the field**.

The research also found existing gaps between the poor prevention practices (*preventive health*) largely prevalent among the migrants' communities and the prescribed prevention protocols fostered internationally by the health-lead organizations, such as WHO and CDC/USA. As a part of the SBCC interventions for vaccination promotion and other disease control measures, a more focused social-inclusion analysis is needed with regard to the migrant settlers.

It is established that the Polio Virus does not distinguish between the rich and the poor, yet the living conditions among poor foster enhanced risk for its transmission. Poverty perpetuates enabling conditions to the environmental bacteria and viruses in spreading its expanse. Thus, poverty, social-exclusion, vulnerability and gender disparity are some of the many socio-economic parameters that are responsible in making some communities 'high-risk' and 'at-risk' to Polio virus. To conclude, effective and results-based communication strategies use a variety of approaches ranging from psycho-social learning theories of role modeling communicated via the mass media to the use of advocacy and social mobilization. For behaviours to change, cultural taboos, societal norms and structural inequalities need to be taken into consideration. Effective communication plays a crucial role in the entire process. Hence communication strategies have to be cognizant of and in tune with the policy and legislative environment and also linked to the service delivery aspects, be it immunization booths under vaccination programmes or quality oral vaccines available at community-level for the most vulnerable and socially-excluded.

Dedication: Authors dedicated this work to the International Immunization Week observed in the last week of April.

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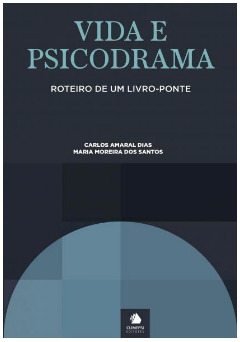

RECENSÕES/REVIEWS

Vida e Psicodrama
Roteiro de Um Livro-Ponte

Carlos Amaral Dias, Maria Moreira dos Santos
Climepsi Editores, junho 2019
272 pp.

O gosto comum pelo psicodrama juntou os dois autores num percurso intimista e sem medos de expor as suas ideias, desejos e perplexidades enquanto pessoas e profissionais.

O roteiro anunciado no título deste livro está dividido em sete dias/encontros (entre o real e o imaginado) em que os autores se propõem analisar, refletir e tecer hipóteses sobre diversas dimensões da "ponte" como metáfora do psicodrama psicanalítico de grupo.

No primeiro dia é dado o mote para o caminho que irá ser construído ao longo do livro. Maria Moreira dos Santos refere que entende o psicodrama psicanalítico como uma espécie de ponte que se vai construindo entre real e imaginário, numa diacronia em que tudo o que vai acontecendo se situa entre essas duas margens, o que permite não só fazer a ligação entre o passado e o futuro, mas também compreender o passado para prevenir o futuro. A esta ideia, Carlos Amaral Dias acrescenta o conceito bioniano de "transformação", para demonstrar que o psicodrama pode ser entendido metaforicamente como ponte que transforma à medida que se caminha por ela, e que permite, por exemplo, tornar dizível o indizível.

O segundo dia é um dia de reflexão. Entrecruzando aspetos biográficos com excertos de uma sessão de psicodrama, Maria Moreira dos Santos continua a refletir sobre a metáfora da ponte. Agora o diálogo sugere uma imagem mais completa, na qual se entreveem o rio, as margens e a ponte que as une, sendo realçado que se trata duma ponte que permite a passagem do passado para o futuro, e vice-versa, e em que o presente vai fluindo em futuro quer as águas sejam calmas ou turbulentas.

No terceiro encontro os autores refletem acerca da importância da dimensão temporal no psicodrama. No dia anterior, no diálogo imaginado, Maria Moreira dos Santos fez referência ao 'aqui e agora' na sessão de psicodrama. Por seu lado, Carlos

Amaral Dias coloca a hipótese do 'aqui e agora' se poder transformar em o 'agora e aqui', colocando a ênfase na dimensão temporal do psicodrama, mais que na dimensão espacial. Para apoiar esta ideia, os autores relembram a fórmula de Einstein, em que o tempo deforma o espaço, mostrando que o tempo está antes do espaço. Realçam que no sonho se pode perceber essa associação, uma vez que é o tempo que vai definir o espaço. Esta reflexão conduz os autores a examinar ligação do tempo com a realização do desejo.

Carlos Amaral Dias, salienta como a fórmula de Bion E=D+T (esperança igual a desejo mais tempo) ilustra a importância do tempo, afirmando que "o tempo é importante para tudo!". Aquilo que aqui está patente é que o desejo precisa de tempo para acontecer, já que, se assim não for, a "passagem ao ato" se torna agir não mentalizado, o que remete para a questão da tolerância, ou da intolerância, à frustração. Os autores enfatizam o aspeto temporal fazendo a analogia com o bebé que espera pelo alimento, já que o que é importante não é tanto o lugar onde é alimentado, mas sim a espera, ou seja, o tempo para a satisfação da sua expectativa de ser alimentado.

As reflexões do quarto dia têm como ponto de partida a frase de Bion "o mito como sonho da humanidade", o que permite reforçar a analogia do psicodrama com a "ponte", já que, em ambos os casos, existe uma ligação em via dupla, ou, mais precisamente, em dupla direção. Será esta via dupla que permitirá o desenvolvimento da função *alfa*, sendo que quando esta função opera no pensamento onírico do sujeito, o mito amplia o sonho que, por sua vez, se deixa ampliar pelo mito.

O quinto encontro entre ambos gira em torno da questão "Qual é, afinal, o trabalho do psicodramatista?". E a resposta dialógica é "Coser o tempo', que será também a função do psicanalista e do psicoterapeuta. Entre aquilo que o paciente traz do quotidiano (a margem esquerda) e a experiência emocional da sessão de psicodrama (a margem direita), constrói-se uma ponte. Ilustrando este aspeto a partir duma sessão de psicodrama, é possível compreender que, na margem a montante, está o passado e o medo, e que, na margem a jusante, está o presente e a compreensão. O paciente está na ponte. Quando consegue compreender e comunicar uma experiência emocional, isso significa que está a 'coser o tempo', que está a construir uma ponte entre o impensável e o pensável, ou seja, está a construir uma ponte que o "transforma'.

Ao sexto dia, Carlos Amaral Dias e Maria Moreira dos Santos refletem a partir da questão 'O que se passa na mente do diretor duma sessão de psicodrama?'. Analisando patologias distintas, vão discorrendo acerca das várias possibilidades que se abrem à mente do diretor durante a sessão. Concluem que o que se passa na mente do diretor é da ordem do respeito pela essência da técnica psicodramática, da capacidade de escuta, da empatia e da abertura ao outro. Ademais, está também ligado ao seu modo de "ser" e de "estar", que deverão ser da ordem da sensibilidade à vida e da tolerância à incerteza que marca, no essencial, o ato de viver.

O sétimo, e último, encontro retoma o tema do mito, promessa que tinha sido feita pelos autores no quarto dia. Voltando à frase de Bion 'o mito é o sonho da humanidade', vão sendo tecidas várias considerações acerca da importância do mito de Moisés e do mito de Jó. Pode considerar-se que o primeiro resume o trabalho conjunto do psicodramatista e do paciente: lado a lado vão construindo a ponte que permite atravessar o rio, uma vez que, "quando o paciente pede ajuda, já poderá estar a vislumbrar ou a desejar o outro lado do rio".

Mais adiante, Carlos Amaral Dias reforça a importância do mito de Moisés no psicodrama, explicando que costuma dividir este mito em quatro partes: em primeiro lugar, a dimensão da mãe, a dimensão da mãe/criança, pondo em relevância o facto de a mãe se sacrificar para que a criança possa viver. Em segundo lugar, é realçado o desamparo da espécie, a constituição imatura da espécie humana na altura do nascimento, que leva ao sentimento de desamparo perante o objeto. O terceiro aspeto relevante deste mito é a solidão, um aspeto marcante da condição humana. A forma como cada pessoa lida com esta situação define a sua construção psíquica. E, por fim, a maneira como o sujeito lida com o estranho, ou seja, o caminho que faz da mãe, do conhecido materno, para o mundo, para o desconhecido.

Este último encontro termina com uma análise do mito de Jó e da sua aplicação numa sessão de psicodrama. Este mito coloca a questão básica de qual é o significado da fé, o que na perspetiva bíblica se refere à fé em Deus, mas que também se pode referir à fé que cada pessoa tem em si própria. Os autores põem ainda em evidência o facto de este mito de Jó oferecer uma leitura que remete à importância da capacidade de suportar a dor depressiva. Sendo que estes dois aspetos, a fé e a tolerância à dor mental, são fundamentais para o crescimento e transformação psíquica.

Chegados ao fim da leitura deste livro-roteiro, ficamos com a sensação de que muito ficou por dizer, mas que aquilo que foi dito, pensado e refletido, pode ser o ponto de partida para que cada leitor possa também definir o seu roteiro para pensar, ou repensar, sobre as imensas possibilidades que se abrem com a sua leitura.

Esmeralda Macedo

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