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**ORGANISATIONAL TRANSFORMATIONS IN THE NEW ZEALAND
RETIREMENT VILLAGE SECTOR:**

**A CRITICAL-RHETORICAL AND -DISCURSIVE ANALYSIS OF
PROMOTION, COMMUNITY, AND RESIDENT PARTICIPATION.**

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Abstract

This thesis examines “customer-focused” communication and resident participation within the retirement village sector which is one part of the increasingly “marketised” aged-care services in New Zealand. In this respect the sector is no different from other domains of consumer life where marketing-oriented organisations aim to find out what their customers want and give it to them. This research examines *communication* related to *customer-focused organisational activities* and residents’ *enactment of participation* within retirement village organisation (RVO) settings with respect to these processes of marketisation.

Taking a critical-interpretive perspective, the thesis undertakes a collective case study involving two major New Zealand RVOs. Both organisations were defined as “retirement villages” within the meaning of the Retirement Villages Act 2003, established in the 1990s, and offered “retirement living” independent housing and apartments across a range of locations. A significant part of the study also examined publicly available promotional material from six RVOs operating multiple sites in various New Zealand locations.

This thesis explores retirement villages as co-productions between the corporate entities that develop and market villages and the residents who live in them. The thesis also explores RVO rhetoric about “retirement living for active 55 plus”, RVO enactment of customer focused communication and activities, and residents responses to and expectations of both. It is argued that this co-production has implications for residents’ participation, their roles and relationships with employees, as well as for organisational communication processes and structures.

The rhetorical and critical discourse analysis reveals the complexity of what “participation” means for the residents. Through a close examination of these meanings, the thesis extends current understandings of relationships between “customers” and “customer-focused”

organisations and highlights the role of older people in Western Society as co-producers of the very product they purchase: the retirement village. It also raises practical and theoretical issues for organisational communication. At the practical level it highlights how communication messages, structures and processes within RVOs experience tensions in meeting the needs of both internal, current, and long-term customers, and external, potential, and future customers. The thesis offers insights into issues of individual action and freedom within the frame of market-driven and avowedly “customer-focused” organisations and consequently suggests a reconsideration of participation in organisations in which customers are also “insiders”.

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CHAPTER 1

INTRODUCTION

This thesis explores retirement village organisations (RVOs) as both communities and organisations, and focuses on relationships between residents' and the RVOs. While researchers have previously examined organisational and residents' representations of ageing, retirement, and retirement communities, this study conceptualises RVOs' activities and residents' participation in RVOs from the standpoint of *organisational communication*.

The emergence of a burgeoning retirement village sector in New Zealand is a recent social phenomenon. This is consistent with trends in the U. S. and more recently Australia, where purpose-built migration destinations for retired people have been established for some time (Hunt, Feldt, Marans, Pastalan, & Vakalo, 1983; Laws, 1993; McHugh, 2003; Stimson, 2002; Streib, 2002). Retirement villages in New Zealand have their genesis in 19th century old age homes designed to cater for a needy indigent population (Saville-Smith, 1993; Tennant, 1989). Such developments in public policy occurred alongside the trend in the medicalisation of ageing (Blaikie, 1999; Estes, Wallace, Linkins, & Binney, 2001; Koopman-Boyden, 1988; Phillipson, 1998). This trend left a legacy of somewhat negative images of passive patients, rest home inmates, and older people suffering from "pathological diseases" (Blaikie, 1999, p. 60). In contrast, marketisation, another important trend in Western societies, has brought into play values of customer focus, customer choice, and customer sovereignty (Christensen, 1995; du Gay, 1996; du Gay & Salaman, 1992). Alongside both of these, retirement as a social institution has developed from a defined period of old age spent outside the workplace, to a period of later life with an emphasis on leisure (Blaikie, 1999; Erkedt, 1986; Featherstone & Hepworth, 1995; Phillipson, 1998).

The inter-play between these trends has helped to bring about new models of retirement villages and changes in the nature of relationships between RVOs and their residents. It is these developments that warrant this research. The thesis takes the approach that it is necessary to explore what happens in every-day organisational communication structures, processes, and member interactions (Cheney, 2006) to gain an understanding of how such processes as the medicalisation of ageing and marketisation have penetrated the retirement village sector in NZ.

Formal, corporate organisations are a recent phenomenon in Western society (Coleman, 1974; Kieser, 1989). Organisations “transcend natural persons in time, space, and resources” (Cheney, 1991, p. 4) and yet also rely on the contributions of natural persons to generate wealth (Cheney, 1991; Coleman, 1975; Deetz, 1992; Estes, 1996; Kieser, 1989). The rise of organisations in Western society and their increasing complexity (Boulding, 1968), has profoundly influenced not only how business is done, but also more generally the working and private lives of individuals (Deetz, 1992; Estes, 1996). In the light of this, the thesis takes the view that retirement villages are worthy of study as organisations because residents’ private lives are intertwined with the goals and operations of the RVO. Residents’ are organisational members whose activities within the village contribute to the generation of RVO wealth. The critical contribution of this thesis to research on retirement villages is that it positions residents as contributing organisational members, rather than as simply residents of the village, or passive recipients of retirement village services. In this respect, this thesis examines agency of residents; understandings of retirement village residents as customers; and the functions of RVO-resident interactions in relation to market-model values such as customer focus.

This introduction to the thesis begins by outlining the origins of the research: my own professional experience in the aged-care sector. The second section explains the research focus and the third section concerns

the nature and structure of the thesis. It presents the research objective, original research questions, and previews each chapter, identifying the issues raised in each one.

Research Origins: My Professional Experiences

From early 1999 to 2001, I was working for Presbyterian Support (Northern) (PS[N]) in Auckland, New Zealand in the position of Relationship Manager for the Redevelopment Project. A Charitable Trust, PS(N) had provided social services and residential facilities for families and children as well as the elderly since the late 19th century (Humberstone, 1984). By the 1990s, many of PS(N)'s village sites, most of which included independent living "cottages", hospitals, and rest homes, were in need of a serious upgrade. I was appointed to the team charged with the responsibilities to manage this process. My key responsibility was to manage a consultation programme with current and prospective residents, and village employees, as well as family members and friends of residents. It was this position and the experience in it that generated ideas for this study.

Over the two years that I worked in the role of Relationship Manager, I travelled to PS(N) villages in the greater Auckland and Waikato regions to conduct focus groups and interviews with residents, employees, and visitors. During one of these activities a critical incident occurred that was to change the course of the consultation programme. I was well into the first round of consultation, and conducting a series of focus groups with cottage residents who lived at retirement villages with a rest home and hospital. I asked a question that resulted in a very different answer from those given in previous focus groups.

Self: If you found yourself moving to the rest home or hospital, what sort of facilities would you like there to be?

Resident: Well, if I *had* to move . . .

Self: What do you mean by “if I *had* to move”?

Resident: Well, I don’t want to move to the rest home. If I get sick I want to stay where I am.

This was the first time I had heard a participant state a preference that challenged working assumptions of residential care for older people. Within the organisation that I worked for, it was assumed that moving from the cottages into care in either the rest home and/or hospital was inevitable for most residents. I wondered *what it was about the organisation* that (a) I had not questioned this “natural order” of the “conveyor belt” model; and (b) managers who had previously undertaken market research had not questioned this same model. Without being cognisant of it at the time, I had begun to take an organisational communication perspective on services for older people, where previously I had been concerned about service provision itself.

For fifteen years prior to taking the position of Relationship Manager, I had worked in health social work and staff development in the aged-care sector. Much of my work involved older people who, for health reasons, needed services and whose spouses and families were the backbone of their everyday social and support network. Many older people wanted to stay in their own homes, and yet available resources (their own and those of the health system) often fell short of achieving this with complete success. Even though independence and dignity as expressed by older individuals were central to their sense of wellbeing, system issues meant that older people could not always get what they would have liked to meet their identified needs.

Moving into a management position, I became distanced from the day-to-day dynamics of care of the un-well older person and started to notice aspects of the bigger picture. Although I was aware of developments in the sector, especially in the growth of retirement villages, it was on leaving the provinces and working in Auckland that I began to

notice the trend towards the selling of “retirement living”. I began to see ageing as something commercial, where the requirement for financial profit was as important as the care mission.

My interest in organisational communication developed as I noticed how aged-care organisations (re)presented ageing, care, residents, and retirement (while I was working in an organisation doing just that). On the face of things, it looked like expectations of ageing were changing, especially with the growth of the positive ageing movement. I began to wonder how organisations offering services to older people found out what older people wanted. How did providers decide on the services to offer and in what ways did they refer to “care”, “retirement”, and their “clients”? Other questions arose concerning messages, ideas, and issues that induced older people to choose these offers. *What did older people actually want – and what’s more, who was really listening to them?* In this respect and to what extent were they being told what to expect?

Intuitively, I was questioning assumptions that underpinned the accepted nature of the aged-care sector, the types of services offered to older people, and the relationships between providers and older people. Thus, the focus group participant’s response to my question was a crystallising moment in making the invisible and unquestioned assumptions about retirement villages, visible.

In the end, these conversations with retirement village residents contributed to a change in the proposed design of retirement village dwellings: the new features allowed for full wheelchair and hospital bed use. These focus group participants may have also contributed to a change in organisational philosophy (see Presbyterian Support [Northern], 2003). This experience influenced my decision to focus on the issues explored in this thesis, namely what happens in RVOs between residents and management that creates and represents lived experiences of retirement villages.

Research Focus

This research is original in that it explores retirement villages as organisations rather than as only places in which to live. This brings into focus the corporate nature of RVOs and roles of RVO employees in helping to construct retirement village living. This organisational communication perspective (Taylor, Flanagan, Cheney, & Seibold, 2001; Mumby & Stohl, 1996; Redding & Tompkins, 1988; Tompkins, 1984) emphasises the day-to-day interactions of employees and residents, and their influence on each other's roles and responsibilities, expectations, and even the organisational goals. Significantly, this thesis explores *resident participation* where residents are *organisational* members rather than as only members of the residents' community. Organisational participation has tended to focus on employee participation in organisations and its role on productivity and worker satisfaction (compare Cheney, Straub, Speirs-Glebe, Stohl, DeGooyer, Whalen, Garvin-Doxas, & Carlone, 1998; Dachler & Wilpert, 1978; Stohl & Cheney, 2001; Strauss, 1982). In treating residents as organisational members, this research locates organisational participation within the residents' as well as employees' domain. Therefore, an organisational communication approach to residents' participation focuses on communication from and with the RVO. It examines residents' everyday activities, resident-employee interactions, and corporate goals and promotional activities, as well as relationships between them.

The thesis draws on social constructionism (e.g., Allen, 2005; Berger & Luckmann, 1966; Burr, 2000; W. Potter, 1996) and takes a critical-interpretive approach to the research. Broadly speaking, this approach takes into account individual understandings of reality as well as societal patterns and norms that help to shape such interactions (c.f., Cheney, 2000b; Denzin & Lincoln, 2005a; Kincheoloe & McLaren, 2005; Mumby 2000; Patton, 2002; Schwandt, 2000).

My research objectives for the research were to:

1. Understand the importance of organisational communication in the construction, maintenance, and possible exclusion of ideas about ageing, retirement, and retirement village living within the contexts of the medicalisation of ageing, the leisure-isation of retirement, and marketisation.
2. Investigate (re)presentations, images and perceptions of ageing in use; underlying assumptions and values; patterns of communication; and areas of convergence and divergence in communication between retirement village organisations and residents and other people over 55-years of age within the contexts of the medicalisation of ageing, the leisure-isation of retirement, and marketisation.

These are more thoroughly explained in relation to the research questions in Chapter 5.

Thesis Structure

The thesis is structured in 10 chapters. The first four provide the context to the research and are followed by the methodology chapter (Chapter 5). The findings and discussion are presented in the four analysis chapters, with future implications of the research being raised in the concluding chapter.

The purpose of Chapter 2 is to locate the field of study. It explains the New Zealand legal definition of retirement villages and the “bundle of rights” (Flint, 2001, p. 28) that residents buy when choosing retirement village living. The chapter also outlines the historical development of retirement villages in New Zealand. Finally, through a review of New Zealand and international studies on retirement villages, the chapter identifies opportunities for research on retirement village with an organisational focus.

Chapter 3 also locates the research, this time within the wider historical, linguistic and social contexts which continue to contribute to the

development of retirement villages. The chapter explores the influences of the medicalising of ageing and the social institution of retirement on the emergence of aged-care and retirement village sectors. In addition, the development of organisations is presented as a central influencing trend in the 20th century (Boulding, 1968), with implications for organisational roles in individual lives. Here I argue that that RVOs are simultaneously formal corporate entities that produce retirement villages as their central product, and places where one group of stakeholders – residents – live. This chapter takes the view that an organisational communication approach enhances research on retirement villages.

Chapter 4 further contextualises the research by examining issues of consumption, leisure, marketisation, and their influence on retirement villages. I also explain the dimensions of an organisational communication approach and how this is important in the research. An organisational communication approach positions communication as “messages, symbols, meanings, and discourses” and how “they play out within, between, and about organisations” (Simpson & Zorn, 2004, p. 15). This standpoint focuses on resident-employee interaction, formal corporate promotion, and the “blurred” boundaries of internal-external organisational communication (Cheney & Christensen, 2001).

Chapter 5 explains how the original research questions were refined to take account of the issues emerging from the data analysis. The resulting theoretical shift was a combination of reassessing perspectives on the data and the outcomes of analysis of organisational documents, interview and focus group transcripts. The chapter details the social constructionist philosophical foundations, critical-interpretive theoretical framework, the use of rhetorical criticism and critical discourse analysis, the case study research design, and data collection and analysis methods applied in the study.

The analysis chapters (6-9) are organised around four conceptual lenses which emerged from the data analysis: *representation, community,*

participation, and motivation or transformation. I focused on formal organisational messages, interpretations of those messages, and interactions between current organisational members (residents and employees) as well as between the RVOs and potential residents.

Chapter 6 examines RVO promotional representations of retirement village living which form the background to discussions on resident participation. These RVO representations in promotional material include those of residents, retirement village living, and the organisations themselves. In the context of residents' participation, RVO representations of retirement village living and expressions of organisational values form guidelines for individual and collective interactions and therefore, the nature of participation itself.

The central purpose of Chapter 7 is to explore RVO insiders' (residents and employees) and outsiders' (non-residents) standpoints on community with reference to wider societal contexts. These differences were central to understanding both attraction and resistance to retirement villages. The challenges experienced by retirement village residents and older people in claiming, creating, and maintaining a sense of community raised issues about residents' participation in RVOs. Moreover, RVOs as organisations produce villages that promise community, and that both demonstrate and challenge commonly held ideas and expectations about belonging. Through examining trends external to, as well as within the organisation this chapter helps us to understand reasons behind residents' participation within RVOs.

Chapter 8 considers a range of meanings and practices associated with residents' participation in retirement villages. It examines the implications of resident (or customer) participation in RVOs and it shows how participation works, with what authority, and to whose benefit. Several interconnected arenas of communication are discussed including: residents' and RVO employees' descriptions of their respective roles and their expectations associated with these; relationships between intended

corporate messages and residents' interpretations of those messages; and finally, both residents' and RVO expectations of participation. Three domains of residents' participation are explored: managed, accepted, and structured informal participation.

Chapter 9 examines those areas where residents' participation is contested by both employees and residents, and suggests that hopes for transformation may be one motivational factor for residents' participation in RVOs. The chapter explores critical incidents (Patton, 2002) that demonstrate the ongoing negotiated nature of residents' participation in RVOs and dimensions of employee power which appeared to go unquestioned by either residents or RVOs. Together these examples reveal the extent to which marketisation has colonised the retirement village sector. They also show the constraints imposed by ingrained discourses and practices of the medicalisation of ageing, as well as how residents' demands of RVOs challenge RVO enactment of customer-focused or resident-focused behaviour.

The conclusion, Chapter 10, reflects on the key findings of the research and raises implications of the research for retirement village residents' quality of life and organisational systems and processes, as well as for future research and practice. The central idea is that residents are co-producers of the village product: An idea that has important implications for residents' agency and participation in RVOs, as well as the RVOs' expectations of residents and their organisational goals.

There are many tensions and multiple perspectives in this research on RVOs, and yet recurring themes emerge from participants' voices. The research demonstrates that older people are not mere dupes in the commercial world of the retirement village business; nor are RVOs simply rogues manipulating ideas of ageing and retirement to their own benefit. Rather, residents of retirement villages are in the process of negotiating new roles for themselves as customer-producers of retirement villages. Meanwhile RVOs, operating within the long shadow of medical-model

attitudes to older people, are having to come to terms with a new generation of older people who expect to be listened to and expect to participate in RVOs *because they pay for it*. The *paying* to live in a retirement village (that residents also help to create) puts a new perspective on customer relations and customer-driven discourses for residents and RVOs. This thesis offers insights into issues of individual action and freedom within the frame of market-driven and avowedly “customer-focused” organisations and consequently suggests a reconsideration of participation in organisations in which customers are also “insiders”.

CHAPTER 2

RETIREMENT VILLAGES: THE FIELD OF STUDY

Introduction

The chapter reviews relevant New Zealand and international literature in the field of retirement villages. *Retirement communities* is a descriptor used to refer to different kinds of retirement accommodation complexes and campuses from towns, villages, communities, to a range of informal and formal, congregated housing for older people (Hugman, 2001; Hunt et al., 1983). One definition of a retirement community is (a) “a planned development consisting of a group of housing units, that has at least one shared service or facility, target marketed to individuals over a specified age” (Lucas, 2002, p. 325), where (b) the term “retirement” is used to identify those individuals in some way (Hugman, 2001; Longino, 1981). My study focuses on the type of legally-defined retirement community in New Zealand: the *retirement village* as defined by the Retirement Villages Act 2003.

The chapter *first* explains the New Zealand legal definition of retirement villages. The *second* part provides an historical overview of the development of retirement villages in New Zealand. In the *third* section, I review New Zealand and international studies on retirement villages and identify opportunities for research within the field of organisational communication. Rather than treat the organisation as a given within the study of retirement villages, an organisational communication approach considers the RVO and associated communication activities as central to the research.

Retirement Villages in New Zealand

In 1999 the Law Commission stated that a retirement village in everyday language is understood to mean “a collection of residences (sometimes together with shared recreational, dining, rest home, or

hospital amenities) designed for the accommodation of the elderly” (p. 1). This definition highlights three aspects which define a retirement village: (a) location of group housing; (b) shared facilities; and (c) shared age-group. However, in 1999, these features were *informally* identified, and “retirement village” was not a legal term. The Retirement Villages Act 2003 brought into being a legal definition of retirement villages with four defining characteristics. These are (a) congregation by age; (b) the nature and purpose of the village; (c) contractual agreement defined by payment of a “capital sum”; and (d) community created by a “collection” of residences. Ownership of the retirement business or facilities is not a defining criterion: Retirement villages may be owned and operated by private individuals, Charitable Trusts, as well as private and public companies (corporate bodies).

One type of retirement community not considered in this study is the gated retirement subdivision which is a recent development in New Zealand. For example, Fisher Morris (n. d.) used this type of property development at Katikati in 1995, and has duplicated it in other locations. This model offers a freehold title purchase and is administered through a body-corporate legal structure. This legal structure is different from most New Zealand retirement villages, many of which use the *licence to occupy* type agreement (Retirement Villages Association, 2000). Significantly, in terms of the 2003 Retirement Villages Act, this model does not constitute a retirement village *unless* it provides services or facilities to the residents *similar* to those commonly provided by other residential units that provide accommodation predominantly for retired people.

The central difference between retirement villages and rest homes and hospitals is resident *need* (Flint, 2001). Rest homes and hospitals provide care *only* to frail residents assessed as needing this service. Importantly, organisations that operate only rest home and hospital services are not classed as retirement villages (Retirement Villages Act, 2003).

Nature of Residents: Specified Entry Age

The first feature of retirement villages is that the residents are usually restricted to being 55-years and over (Flint, 2001; Retirement Villages Association, n. d.). In line with marketing trends in the “mature” sector (Blaikie, 1999; Chaney, 1995; Sawchuk, 1995), retirement villages differentiate their products and services on the basis of chronological age (Laws, 1995; Lucas, 2002; McHugh, 2000). Retirement villages are “retirement destinations”, rather than “aged-left-behind localities” (Lucas, 2002, p. 325) and are characterised by an influx of “pre-elderly and elderly” people; they are “target marketed to individuals over a specified age” (Lucas, 2002, p. 325). However, the minimum entry age does not correlate with the average entry age of residents into units/villas which is approximately 75-years (Bell & Associates, 2003; Retirement Villages Association, 2000).

Nature of Retirement Villages: “Life care” and “Lifestyle”

The second defining feature of retirement villages is their stated *purpose*. David Thorns wrote in 1993, that the main purpose was to provide *life care*. However, many retirement villages now promote themselves as offering *lifestyle* and *leisure* (Blaikie, 1999; Hugman, 2001), with an emphasis on independent living.

The life care retirement villages offer formal continuing-care facilities by way of rest home and hospital services in addition to independent and assisted living accommodation (Flint, 2001). Some of these villages also offer residents personal health services in their own home, or the opportunity to move to assisted-living accommodation within the village (Davey, Joux, Nana, & Arcus, 2004; Flint, 2001; The New Zealand Retirement Guide, 2003/2004). In New Zealand the life care or *continuing care* village has been dominated by religious and welfare organisations (Flint, 2001; Thorns, 1993). However, this changed with private enterprise entering the field in the late 1980s and 1990s. Presently

“[t]he majority of retirement villages in New Zealand are run as commercial ventures” (Flint, 2001, p. 26).

In recent years, the emphasis has shifted towards commercially run lifestyle villages with a focus on wellness (Flint, 2001). These lifestyle villages may be “in a setting much like a luxury hotel, rather than the townhouses or villas of the village complex we have come to know so well” (“The best of both worlds”, 2003/2004, p. 16). Thus, the nature of the village depends on whether the purpose of the village is life care or lifestyle.

The differences between lifestyle and life care are highlighted in stated concerns about future challenges for the retirement village industry. One challenge is the anticipated higher demand for services by increasing numbers of “old-old” residents within lifestyle villages (Retirement Villages Association, 2004). This concern captures two major, but competing discourses of ageing: *old age* as poor health and *retirement age* as active leisure.

Nature of the Purchase: Buying Rights not Property

A third defining feature of retirement villages is the nature of the purchase, which entails the payment of a *capital sum*. The Act says that

retirement village means the part of any property, building, or other premises that contains 2 or more residential units that provide, or are intended to provide, residential accommodation together with services or facilities, or both, predominantly for persons in their retirement, or persons in their retirement and their spouses or partners, or both, and *for which the residents pay, or agree to pay, a capital sum.* (Retirement Villages Act, 2003, Part 1.6.1, format as per original, italics added)

Thus, regardless of the type of purchase (e.g., lease, unit title, or occupation-right), the residents’ payment of a capital sum is a critical criterion for defining a retirement village.

Of the four available legal structures for retirement villages, the licence to occupy (or *occupation right agreement* as it became in 2003) was

used by 57% of villages in 1999. The remaining 43% comprised a mixture of unit title, cross-lease and lease for life (Law Commission, 1999). Except for the unit title option, the contractual arrangement does not confer ownership of property on the buyer.

The issue of ownership title however, is not central to the definition of a retirement village. The resident buys the right to access services and facilities as well as a place to live (Melrose, 2003/2004). Thus, when buying a home in most New Zealand retirement villages “you are not buying property per se, but . . . a *bundle of rights*” (Flint, 2001, p. 28, emphasis added). It is this “bundle of rights” that distinguishes retirement villages from other types of accommodation.

Nature of Community: Locality and Interest

The final defining feature of retirement villages is the *collection of residences* required by virtue of the *purpose* of the village. It is the proximity of housing and access to amenities together that create a “collective” (Retirement Villages Act, 2003) The *types of dwelling* vary across retirement villages and may include groups of “villas” or townhouses for independent living, serviced apartments for supported living, and/or accommodation offering full services (“A new lease of life”, 2003/2004). A retirement village is therefore more than a collection of residences, because the *purpose* of the retirement village helps to determine the *nature* of the collection of residences.

A collection of residences may include those owned and operated by an organisation, but which are scattered. For example, some villages sell occupation right agreement dwellings which are in nearby streets around the main care and recreational facilities. Such examples are rare in New Zealand, with the majority of retirement villages being designated and identifiable sites (The New Zealand Retirement Guide, 2003/2004). However, this example illustrates that it is possible to have a collection of residences by virtue of *membership* of a retirement village. That is, the

collective nature of the village, whether in location or in terms of being part of an organisation, helps to define a retirement village as such.

In summary, a retirement village in New Zealand is a legally defined entity relating to collections of residences for people aged 55 years of age and over. In general there are two broad types of retirement villages: the life care and lifestyle models. One critical factor in defining retirement villages is the payment of a capital sum to the retirement village owner; the other is the provision of, and residents' right to use, shared recreational and social facilities.

The Emergence of Retirement Villages in New Zealand: From Charitable Trusts to Private Enterprise

It should be noted that retirement communities are a Western phenomenon. In fact retirement communities had been an American phenomenon for over 30 years (Hunt et al., 1983) by the time they became visible within New Zealand. Purpose-built and commercially created age-segregated developments initially appeared in America during the 1950s, although age-segregated, not-for-profit communities were present in the 1920s (Marans et al., 1984). The first large commercial ventures were the outcome of the historical development of age-segregated housing and naturally occurring retirement communities. By the late 1970s, in the U. S. approximately one million people lived in nearly 2,400 retirement communities (Laws, 1993; Marans et al., 1984; McHugh, 2003).

Such numbers represent less than five per cent of the target population for retirement villages, yet the presence of these communities influences images of ageing (Ekerdt, 1986) and contributes to ageing identity that is "not-Sun-City identity" (Laws, 1993, p. 276). They also shape perceptions of *where* older people live (Hugman, 2001): For instance, Hugman points out that popular representations routinely overestimate the percentage of older people living in residential care (i.e., rest homes and hospitals). He suggests that "such institutions define a normative view of older people" (p. 60).

Retirement villages are not usually categorised (at least by residents) under the same heading as rest homes and institutions. Yet, they all have a common history in the context of housing for the elderly in New Zealand. Therefore, it is important to briefly trace the historical development of institutional accommodation for older people.

From Charitable Trusts to Private Business

In 1870 the first “refuges” for old men and old women were set up in Auckland, and during the following ten years “old age homes” began to appear in other parts of New Zealand (Saville-Smith, 1993; Tennant, 1989). This process of institutionalisation of older people has been described as “the process of separating elderly people from family and community by isolating them in separate physical arrangements in which they are the predominant, or only occupants” (Koopman-Boyden, 1988, p. 637). This definition assumes that living in a physical setting with other similar aged residents is not part of the community – that is, wider society.

Twenty-five years ago in New Zealand, there were basically two options of residential living for older people: care in rest homes or care in hospitals. Although many rest home residents needed care and support, some residents were independent and driving cars (personal experience, Thames 1984). However, in time these institutional accommodation options became synonymous with dependence and care, while independent living became associated with living in the community (e.g., Barker, Caughey, & Guthrie, 1982; Dalziel, 2001; Dyson, 2002; Gergen & Glasgow, 2000; Hugman, 2001; Koopman-Boyden, 1988).

Until the early 1980s the area of residential care was dominated by religious and welfare organisations and charitable trusts, along with a few public hospital boards, and a small but increasing number of private providers (Saville-Smith, 1993; Thorns, 1993). One of the main reasons for this domination was the funder-provider partnership between state and religious and welfare organisations (Joseph & Chalmers, 1999; Saville-Smith, 1993; Thorns, 1993). The government provided capital and staff

subsidies to religious and welfare organisations in return for providing residential care services for older people.

This arrangement held from the mid-1950s until the mid-1980s, when it was replaced with a fee-for-service for all eligible (means tested) residents in any care facility – including those run privately (Else & St John, 1998; St John, 1993). This change may have helped facilitate private sector development in rest homes (Joseph & Chalmers, 1999). However, from the mid-1980s there was considerable growth in the private sector in building retirement complexes as well as rest homes (Burgess, 1991; Thorns, 1993). In 1989 the Retirement Villages Association was established (Retirement Villages Association, n. d.), and this signalled the beginning of a professional body for organisations developing and managing retirement villages.

While the funding change for rest home care cannot in itself account for the largely private development of retirement villages, it should be noted that most of the retirement villages built in the 1980s were part of complexes that included a mix of independent dwellings, a rest home, and/or hospital. The independent dwellings of the village were seen to be the *point of entry* to a bundle of accommodation and service options offered on the basis of anticipated increasing needs of residents. The retirement villages of today are a far cry from these early efforts to provide residential accommodation for the elderly, and even further away from the notion of institutionalisation. Retirement villages now vary enormously in their provision of housing, services, and facilities (“A new lease on life”, 2003/2004; Law Commission, 1999; Melrose, 2003/2004).

During the period from 1999 to 2006 a number of New Zealand religious and welfare organisations sold their entire stock of village complexes: For example, Presbyterian Support (Northern), the Salvation Army, and the Roskill Trust sold their rest home, hospital, and village complexes. One reason given was the religious and welfare organisations’ inability to fund maintenance or redevelopment of the properties within

the new funding arrangements (Gibson, 2006; Taylor, 2005; Thompson, 2003). In the case of Presbyterian Support (Northern) (2002, 2003), another reason was to focus on the provision of community rather than residential services for older people.

Retirement Villages: First Appearances and Descriptions

Prior to late 1980s, there is very little mention in the literature of retirement villages in the New Zealand. For instance, there is no mention of retirement villages per se in the New Zealand report to the World Assembly on Ageing in 1982 (Barker et al., 1982). The accommodation section of the report discusses a range of housing options including traditional owner-occupied housing (called “ordinary housing”); special housing for the elderly (Kaumātua [Māori elders] flats, granny flats, pensioner flats), and “residential homes” by which is meant residential care. It is not until the section on “dependent flats” that a description of something like a retirement village appears. The description refers to “comprehensive complexes” and particularly to the facilities of religious and welfare organisations. These complexes include “flats along with hospital and home beds” (Barker et al., 1982, p. 89). The term “home” indicates that the purpose of such complexes is residential care.

That said, however, there is one solitary mention of a village: “The large homes [for the elderly] occupied by over a hundred residents are all operated by religious and welfare organisations and one is a resident ‘village’ containing over 300 beds” (Barker et al., 1982, p. 71). There is no further explanation about what this village may be, but, in the light of the earlier reference to flats, this could be read as a comprehensive complex. It is not until 1986 that retirement villages are discussed in any depth within the context of housing for older people.

The first significant mention of private sector retirement villages appears in 1986 with two articles involving G. Brent Hall and Alun Joseph. Both studies use an Auckland case study to report on “Special Housing” for the elderly within the context of demographic changes (Hall & Joseph,

1986; Hall, Roseman, & Joseph, 1986). The authors note that in 1984 in Auckland, there were “no wholly commercial retirement villages on the American or Australian model” (Hall et al., 1986, p. 134), although “two were planned” (Hillsborough Heights and Hibiscus Coast in 1985 and 1986 respectively). Tauranga was another location for one of the first commercial retirement villages (Hall et al., 1986). Hall and Joseph describe these retirement complexes as offering residents accommodation, recreation and health facilities, security and companionship.

Another mention of retirement villages appears in a report for the National Housing Commission in 1987 (since disbanded) (Campbell, Ny, & Thorns, 1987). In this report on housing for the elderly, the authors examined a range of housing options within the context of demographic and policy changes. The discussion on retirement villages relies heavily on newspaper and magazine reports about specific developments in Auckland, Coromandel, Tauranga, and Wellington. It also provides some description of the types of retirement village complexes that existed at the time. The authors briefly discuss the financial arrangements of the contract between buyer and seller, and describe the “deal offered to the elderly . . . as a package which is catering for the entire health and social needs of this group in the population” (p. 60).

Three key observations of retirement villages were made in this report: (a) the shift from welfare policies to more market-oriented policies resulted in increased private sector activity in the area of institutional accommodation for older people; (b) the growth of retirement villages operates independently of state subsidy and demographic demands; and (c) only a certain section of the population would be in a financial position to afford to live in a retirement village (Campbell et al., 1987). Importantly, the authors signal one criterion that made it possible for private operators to move into the sector: That is, *the choice to live in a retirement village is dependent on disposable income and not demographics or state funding*. However, saying that retirement village living is not related to

demographics but only to disposable income is problematic. The number of older people *with* disposable income (and who choose retirement village living) needs to be sufficient to support the ongoing growth of a new retirement village sector. In this respect, retirement village growth did not develop wholly independently of demographics. Finally, the authors stress that research in the area of retirement villages is inadequate in terms of exploring the long term effects of retirement villages on wider society and residents themselves.

The 1988 Royal Commission on Social Policy “Perspectives on the elderly in New Zealand” (Koopman-Boyden, 1988) relies almost exclusively on Campbell et al. (1987), and Hall and Joseph (1986) for its short discussion on retirement villages. The report offers no information about numbers of retirement villages or residents living in them. However, like Campbell et al., Koopman-Boyden notes that there was little research at this time on the impact of retirement village living on lifestyles of village residents.

Another New Zealand milestone was the 1990 research, “The lifestyle and well-being of New Zealand’s over-60s”, commissioned by Age Concern New Zealand (Colmar Brunton, 1990). This study found that the vast majority of respondents knew of retirement villages, and the very small proportion who did not, were over 80-years of age, and/or living with family, and/or non-Pākehā¹. The study also identified several factors that made retirement villages appealing. These were companionship and access to medical facilities, help in emergencies, and property and

¹ Pākehā is a Māori (indigenous people of Aotearoa New Zealand) term for non-Māori, Caucasian people (P. Ryan, 1999).

personal security. The non-appealing factors for research participants included several important factors: Respondents were either happy where they were, or did not want to leave home, lose independence, or live with only older people. Additionally, respondents were put off by the nature of retirement villages which included the perceived lack of privacy, communal living, and housing being too close together.

In spite of the increasing presence of retirement villages, and awareness among people over 65-years of age, this accommodation option is conspicuously absent both in reports about housing for older people and in Census data. In a report in 2001, "Living Standards for Older People" (Fergusson, Hong, Horwood, Jensen, & Travers, 2001), the section on home ownership discusses several options for rental and ownership, but retirement villages are not covered except in the section about the (then impending) Retirement Villages Act. Secondly, in "Creating Communities for All Ages" (Gergen & Glasgow, 2000) the authors note that "[d]ifferent generations may have different expectations for retirement housing" (p. 22) and that housing features, such as one or two bedrooms, are now expected by both Māori and Pākehā residents. However, while they discuss a range of accommodation options, retirement villages are not included.

Other demographic information comes from Bell and Associates' (2003) satisfaction survey conducted for the Retirement Villages Association. The researchers contacted the 153 member villages of which 107 agreed to take part. They surveyed only those living in independent accommodation and identified some descriptive statistics about retirement villages. These were as follows:

The average entry age for respondents was 75.6-years

Two-thirds of residents were female and one-third male.

59% of the residents lived alone.

66% drove a car or lived with someone who did.

Levels of satisfaction among residents were very high.

People move into retirement villages for the lifestyle, security, more easily managed houses and sections, and for on-site help and care services.

Village size ranged from under 25 to over 200 units.

From this review it can be seen that retirement villages as a social phenomenon were slow to enter public reporting. In the following section I discuss the small in number, but wide ranging research on retirement villages in New Zealand.

Research on Retirement Villages in New Zealand

With the exception of Burgess' (1991) comprehensive investigation of Auckland retirement villages, much of the New Zealand research on retirement villages is post-2001. In "Aotearoa ageing: A bibliography of New Zealand research on ageing, 1997-2001" (Gee & Davey, 2002) only two studies on retirement villages appear under the section on *housing*, both of which are Law Commission (1998, 1999) publications. However, in the second Bibliography 2001 – 2005 (Davey & Wilton, 2005) retirement villages have their own section with eight studies listed. Although not a complete list of publications from the last five years (conference proceedings were excluded), this list reflects a significant increase on the previous five years. The situation also reflects the relative newness of retirement villages as housing options for older people.

To date, most New Zealand research on retirement villages has focused on either the residents' lived experiences or on the social phenomenon of retirement villages itself, although research now covers a wide field. One example of research focusing on the lived experiences of residents is a study of Alandale Village in Hamilton (Grant & Neilson, 1999). Although in part an historical account of how the village was established, the study also includes information on village management structure, an example of the social calendar, and residents' stories. One resident talks of being asked about living "in there"; another of retirement

as being anything but “retired” because “Alandale seemed to be more about user does than user pay!” (p. 49).

Other studies have examined retirement villages as alternative places to live (Grant, 2003) and as a marketed housing choice for older people (Leonard, 2002). Wilde (2001) examines perceptions of “valued facilities” by residents, promoters and managers, and Bowen (2003) investigates factors considered in decisions to enter a retirement village as well as the impact of the decision on residents’ contacts with people outside the village. In the field of leisure and sport, Grant (2001, 2004) explores leisure activities of older people, including retirement village residents, and Pearce (2004) comments on the role of regional policy in requiring retirement villages to acknowledge the need for greater activity, amenities, development, and creativity. From a social geographic perspective, Greenbrook (2005) examines the changing role of retirement villages in New Zealand’s ageing society.

The research of Graham and Tuffin (2004) uses a discursive approach to explore how 12 retirement village residents experience retirement village living. This study is important because it demonstrates a “meso” level of discourse (Alvesson & Karreman, 2000b; van Dijk, 2001a) in action, in that the authors sought to identify discourses within the data and how these operated in the talk about retirement villages. The researchers identified two main discourses within residents’ construction of their retirement village. The first was construction of the retirement village as a place where, through “careful management of relationships and respect for people’s choices” (Graham & Tuffin, 2004, p. 187), companionship and privacy could be achieved. The second was the construction of the village as a place of security because of the physical and social environments.

The research of Juliana Mansvelt (2001, 2003, 2005a, 2005b) explores “how ageing identities are both embodied and emplaced” (2001, p. 332). Like Laws (1995, 1996), Mansvelt highlights how different discourses of

ageing *emplace* older people differently: Active ageing discourse emplaces seniors in resort-style settings; ageing-as-decline discourse emplaces frail elderly in rest homes (Laws, 1996), or in the 19th century, old age homes. With regard to retirement villages, Mansvelt explores representations of retirement villages (2001, 2003), the experiences of residents (2003, 2005b), and the contribution of managers to retirement village life (2005b).

In her 2001 study, Mansvelt reports preliminary findings of a textual analysis of 20 advertisements of 13 retirement villages. She found that the “symbolic aspects of retirement villages are more significant than the empirical attributes of residential choice (such as cost, availability, quantity, facilities)” (p. 331). In this respect the study shows that retirement villages were represented as (a) a lifestyle choice; (b) a consumption choice of active lifestyle; (c) a sense of belonging; and (d) as a “means of slowing, even halting, the inevitable decline associated with old age” (p. 331).

In subsequent studies, Mansvelt (2003, 2005a, 2005b) sought views of retirement village residents and found that differences emerged between their views and advertising rhetoric. For instance, few talked about living in the village as a “positional good” (2005a, p. 88); rather, their reasons for buying into a village tended to be because of push factors such as those identified by Stimson (2002; also Stimson & McCrea, 2004). However, autonomy and the freedom to choose loomed large as reasons for choosing to move to a retirement village.

Managers and employees were identified as impacting on residents’ experiences of the retirement village (Mansvelt, 2005b). Mansvelt tells of one resident who complained that the manager had stopped a small group of residents meeting monthly because the manager wanted the village to work as a whole. Also, employees in roles such as recreational officers were seen to be central to the “shaping of appropriate or ‘natural’ ageing in place” (2005b, Sec. 6, ¶ 7). For example, “when employees get it wrong, the effects are most obvious (one resident who

approached me, told me with disgust that he refused to sing nursery rhymes in the sessions held at the rest home)” (2005b, Sec. 6, ¶ 7).

Aside from Mansvelt (2005b), who involved managers in her research, only two other retirement village studies so far have involved other stakeholders (see Wilde, 2001; Head, 2004). Most other studies to date focus on residents of retirement villages.

Current State of the Retirement Village Sector

The Retirement Villages Association shows in its 2000 research that there were approximately 303 retirement villages in New Zealand. This was a 13% increase in numbers since the previous survey in 1998. More than 200 retirement villages have been built in New Zealand since 1980 (Mansvelt, 2005a, 2005b). Of these, the operators include publicly listed and private companies, owning between 7 and 13 villages each (Read, 2004; Springall, 2004).

In terms of resident numbers, of 259 respondent villages to the Retirement Villages Association (2000) research, 17 had over 200 residents and 14 had between 150 and 199 residents. Nearly half of the retirement villages (124) had between 50 and 149 residents. In terms of overall numbers, this same survey estimated there to be approximately 21,000 people living in retirement villages (also see Ministry of Social Policy, 2002). One issue that remains unclear is whether these figures refer to those only living in independent accommodation, or whether the figures refer to all residents of each village – which may include a hospital or rest home.

The final example of retirement villages being conspicuous by their absence is the lack of reference to them in the Census data of 1991, 1996, and 2001 (no figures are yet available for 2006). The report prepared for *The Centre for Housing Research Aotearoa New Zealand* (Davey et al., 2004) is the first public-sector work (i.e., outside of the Retirement Villages Association and individual research) since Campbell et al. (1987) to discuss retirement villages. While the report draws on recent research in

retirement villages, it says there are no details of retirement villages which are available on a national basis – meaning there is no category of retirement village in Census material (also see Davey & Gee, 2002; Statistics New Zealand, 1998, 2002). (However, some information is available from the list of registered companies and the Retirement Villages Association.)

In contrast to the lack of specific references to retirement village, Census data includes several categories of non-private dwellings used to indicate places that accommodate older people. Census data (1991, 1996, 2001) shows that there were (with respect to each Census) 735, 801, and 894 homes for the *elderly or retirement homes* in New Zealand (Davey & Gee, 2002). In 2001 approximately 29,500 people over the age of 65-years were living in homes for older people/retirement homes or hospital (Statistics New Zealand, 2002). From this, it would seem that retirement village numbers and their residents are incorporated in these figures, yet “rest home” and “retirement home” have different meanings from “retirement village” (Flint, 2001).

The Census term “elderly/retirement home” clearly does not fit *funding* or *need* models of rest home/hospitals and retirement villages. In terms of funding, the former may be subsidised by the state, whereas retirement villages are funded by private individuals who pay a capital sum for the *right to occupy* dwellings (Campbell et al., 1987; Dyson, 2002; Retirement Villages Act, 2003). In terms of need, “rest home” and “retirement home” refer to residential facilities providing care (Davey & Gee, 2002), while the “retirement village” is promoted as associated with independence and choice (Blaikie, 1999; Grant, 2006; Mansvelt, 2005b; McHugh, 2003). In summary, the categories used in Census data to include retirement villages are not congruent with generally understood definitions of retirement villages. There could be some separation of care and village accommodation. Those retirement complexes which incorporate village, rest home, and hospital accommodation, could be

categorised in a census by the accommodation style (e.g., independent dwelling, resthome, and so on), rather than the term “elderly/retirement home”.

Another observation is that retirement villages *appear* to be a largely Pākehā phenomenon. National ethnic diversity of New Zealanders over the age of 65-years in 2001 (Statistics, 2002) was summarised as 93% European/Caucasian, 4% Māori, 2% Pacific people, and 2% Asian. There are no official figures about ethnicity of residents in retirement villages, but if these population figures are anything to go by, at least 93% of retirement village residents would be Pākehā. The research by Bell and Associates (2003) did not include any questions related to ethnicity. However, there are a few retirement villages designed around cultural groups (e.g., Netherville Retirement Village in Hamilton for Dutch people). If retirement villages are a largely Pākehā phenomenon in New Zealand, it would be consistent with international trends of minority groups being low users of retirement living (Blaikie, 1999; Laws, 1995; McHugh, 2003; Phillipson, 1998).

International Research on Retirement Communities

From their first appearance in the U. S., retirement communities received mixed reviews from professionals and lay persons alike (Streib, 2002). As the number of retirement communities increased throughout the 1950s and 1960s, the social arrangement of the retirement community seemed to invite close inspection. They were criticised for being “handsome ghetto[s]” where “inmates” were “segregated . . . from the presence of their families . . . from their normal interests and responsibilities, to live in desolate idleness (Mumford, 1956, p. 192). The fact that these new commercial ventures had, to some extent, developed from naturally occurring retirement communities, appeared to be ignored by some critics.

The lived experience of retirement community residents became a focus of study. Evidence emerged that residents benefited from living in retirement communities: For instance, residents liked living in age-segregated communities (Hoyt, 1954; Hunt et al., 1983). Also, residents anticipated and experienced social, emotional, and environmental benefits from living at a retirement village (Aldridge, 1959; Bultena & Wood, 1969; Burby & Weiss, 1976). In particular, retirement communities were seen by residents to address issues that older people experienced living in suburbs and other non-age-specific housing environments. The issues related to transport, security, social and leisure activities, neighbourhoods and companionship (Streib, 2002). Also, Brooks (2001) claims that retirement communities are now more widely accepted among different groups of retirees including GIs (born 1901-1924), Silent Generation Seniors (born 1925-1942), and Baby Boomers (born 1943-1960).

Explorations of What Constitutes Retirement Communities

As retirement villages have developed, considerable efforts have been made to define them and identify their central characteristics and common features. Early studies focus on resident characteristics, community services and facilities, ownership, and village purpose as key features of retirement communities (Barker, 1966; Burgess, 1961; Heintz, 1976; Longino, 1981; Webber & Osterbind, 1961). Lawton, Greenbaum and Liebowitz (1980) identify key characteristics of retirement communities as *planned* and *privately developed* housing that stipulates *age limitations*, requires *purchased dwellings*, and offers a *range of facilities* including shopping, medical, and/or leisure services. However, definitions vary: for instance Hunt et al. (1983) include distinctions between not-for-profit and for-profit communities, whereas Lawton et al. refer only to privately developed facilities without further distinction.

The special edition of the *Journal of Housing for the Elderly* (Hunt et al., 1983) classifies five types of retirement community: retirement new towns, retirement villages, retirement subdivisions, retirement residences,

and continuing care retirement centres. This special edition presents case studies in each of the five categories. According to Hunt et al., each type of retirement community differs in scale, age and needs of residents, range of facilities and services, and ownership. One criterion is the for-profit or not-for-profit status of the village. While the aspects of scale and ownership are not particularly applicable to the New Zealand setting, the overall typology is useful for distinguishing between life care – or continuing care centres – and lifestyle models of retirement villages.

Another broad definition of retirement communities states that they include “a spectrum of living environments for older people: Naturally Occurring Retirement Communities, Leisure-Oriented Retirement Communities, and Continuing Care Retirement Communities” (Streib, 2002, p. 4). *Naturally Occurring Retirement Communities* (NORC) are those that occur in the same way as other housing estates (e.g., first home buyers or young families). *Leisure-Oriented Retirement Communities* (LORC) are those that offer some level of recreational, sporting, and leisure facilities, while *Continuing Care Retirement Communities* (CCRC) offer a care component, either as a service in the home or in residential facilities attached. The LORC and CCRC models appear to parallel the New Zealand distinctions between life care and lifestyle models respectively (Burgess, 1991; Flint, 2001; Thorns, 1993).

Most of these definitions *describe* properties of retirement communities that capture only their observable features: For example, “planned housing”, “leisure oriented”, “age specific” are objective criteria. Another definition offered by Phillips, Bernard, Biggs and Kingston (2000) incorporates these as well as social components:

A retirement element: residents are not in full time paid employment which affects their use of leisure time;

A community element: a specific age group which lives within a geographically bounded space;

A degree of *collectivity*: residents identify with the village, and share access to facilities and may share interests and activities;

A sense of *autonomy with security*: residents see themselves as independent with security of setting.

This definition can apply to any of the types of retirement village mentioned above. Moreover, “it does not exclude forms of support and the use of specialist facilities, [and] it is also open to the subjective experience of residents themselves” (Biggs, Bernard, Kingston, & Nettleton, 2000, p. 651).

In summary, early definitions of retirement villages seemed to focus on externally observable aspects such as the geographical features, services, and age restrictions. More recent conceptualisations of retirement villages include a focus on shared aspirations and lived experiences of residents. This new emphasis is demonstrated in the range of studies on retirement villages now being undertaken. The next section begins with outlining areas of research on retirement villages that are relevant to this thesis and finishes with identifying aspects of retirement villages that offer opportunities for research.

Range of Research Topics

There has been a broad range of research in the field of retirement communities (Streib, 2002). Retirement communities have been studied from the perspective of various fields of study and covering a range of topics some of which are listed in Table 2.1. Streib notes that “the promotion and marketing of various kinds of communities and facilities has been overlooked by most social science researchers” (p. 4). While this may be true, studies exist that report on investigations into the images, messages, and representations of older people in advertising (Carrigan & Szmigin, 2000; Greco, 1988; Kvasnicka, Beymer, & Perloff, 1982; Roberts & Shou, 1997; Zhou & Chen, 1992); marketing related to retirement and older people (Laws, 1996; Moschis, Lee & Mathur, 1997; Mundell, 1994; Nielson

& Curry, 1997; Sawchuk, 1995; Schewe & Balazs, 1992); and more specifically retirement communities (Biggs et al., 2000; Laws, 1993, 1995; Lucas, 2002; McHugh, 2003).

Table 2.1.

Examples of Research Studies Related to Retirement Communities

Field of study	Examples of topics of study
Communication and relationships	Contact with community and village friends (Buys, 2001) Over-control in retirement communities (Lapsley, 2001) Complaining among residents (Alemán, 2001)
Decisions and choices	Involvement of residents' children in decisions re retirement village (Knight & Buys, 2003) Impact on lifestyle of choices in housing (Kim, Kim, & Kim, 2003)
Economic planning	State governments recruiting of retirees (Duncombe, Robbins, & Wolf, 2003)
Health and leisure	Care sharing among residents (Covan, 1998) Older women's perceptions (Siegenthaler & Vaughan, 1998) Leisure in retirement villages (Grant, 2004),
Human geography	Media representations of retirement communities (Lucas, 2002; Mansvelt, 2001) Reasons for choosing retirement village living (Mansvelt, 2003)
Management	Management models (Seigal & Storm, 1968) Development of a new service business (Camacho, 1988)

Several studies are important because they explore the impact of leisure oriented retirement communities, and organisational representations of these communities as expressing ideas of and attitudes towards ageing. Representations of ageing, images, identities and retirement communities have been the focus of a number of studies (e.g., Kastenbaum, 1993; Laws, 1995). Laws suggests that ageing is an emplaced as well as embodied process. She believes identities are created by the

internalisation or acceptance of external representations. With regard to older people, where identities (such as those derived from ageist stereotypes) are externally imposed they are emplaced in spaces external to the older person. Thus, “where ageing is constituted as dependence or withdrawal from society the individual older person maybe *emplaced* in landscapes such as ‘the home, the old folks home or the retirement village’” (Mansvelt, 2005a, p. 86, emphasis added).

With a concern for linkages between changing views on ageing and older people, and the urban built environment, Laws (1993, 1995, 1996) explores the dynamics of discursive representations and material reality of retirement communities. She notes how marketing campaigns “attempt to lure the elderly to (sometimes) exotic ‘lifestyle’ communities” (Laws, 1993, p. 674) and describes multiple sites of Sun City as “*imagineered* environments” (Laws, 1995, p. 276, original emphasis) for consumption by “middle class, white, and largely protestant” (p. 264) people with “sizable pensions and large automobiles” (McHugh, 2000, p. 110) who separated themselves from other generations. Laws is highly critical of the limitations that Sun City-like identities create for older people. She argues that instead of the normalised representation of successful ageing being constructed by retirement community residents, that a multiplicity of ageing identities for old age should be available and accepted (Laws, 1995).

Similarly critical of Sun City-like communities Kastenbaum (1993) sees them as attempts by residents to recreate a by-gone era of youth – a community and way of life with values that no longer seem evident to elders in modern society. These values are “encrusted” in ways “beyond ordinary ‘settledness’” (p. 174) as elders seek to protect their space from time. Through recreating a space where time stands still, residents maintain their way of life that they feel is threatened by a “world that no longer seems interest [*sic*] in work, decency, loyalty and other familiar virtues” (p. 182). Kastenbaum is also sympathetic towards the position of

elders, and calls for understanding of the “defended” (p. 175) nature of retirement communities as a response to societal change.

Other studies build on these issues of representations, images, and identity in retirement communities. McHugh (2000) examines the relationship between images of the ageless self, active ageing, and the image of ageing that emanates from retirement communities. McHugh is concerned with the way “the ageless self” is used as a strain of anti-ageing that “fits snugly within consumer and popular culture images of ‘positive’ aging” (p. 105). Sharon Kaufman (1994) describes the sense of an ageless self as “an identity that maintains continuity despite the physical and social changes that come with old age” (p. 12). While Kaufman focuses on internal identity, McHugh seems to suggest that in the external world of consumption, Kaufman’s “ageless self” is exploited and distorted to become an obsession with anti-ageing “agelessness”. He says that with the “prolongation of midlife . . . rivalling the desire for perpetual youth as the leitmotif of contemporary society” (p. 106), the notion of agelessness becomes a vehicle of continuity that “conveys little about change and what it means to grow old” (p. 113). Such concerns parallel Molly Andrews’ (1999, 2000) sentiments about being “age-ful”. McHugh argues that retirement communities leverage the ageless self through subscription to the “societal mantra” (p. 112) of active ageing: “the route to happiness and longevity; to live otherwise is a death wish” (p. 112). Thus, retirement communities with their emphasis on agelessness and activity provide “societal scripts in successful aging” (p. 114).

McHugh (2003) takes a critical approach to the faces of ageism in his examination of place-based images and scripts used in advertising and promotional materials in popular retirement magazines. His paper is a critique of the retirement industry that invites seniors to “pursue leisure *en masse*” (p. 173), as an “ageless self located in idyllic settings outside of time and change” (p. 169), where they will experience “restoration in the realms of youth, sex, money, health and memory” (p. 171). He argues that images

of “perfect” (p. 171) living for seniors are interpreted as successful “anti-aging” (p. 171) and represent “lifestyle shopping” (p. 172) rather than any real sense of community or equality for older people.

Another approach to relationships between representations of the retirement community as represented by the agencies who own retirement communities and the residents themselves is taken by Biggs et al. (2000). These researchers examine the representations of retirement communities by agencies and the day-to-day experience of residents who live in them. Their data came from formal agency statements about the aim, objectives, and lifestyle of each respective retirement community; residents’ stories about events that captured key characteristics of the retirement community; and “stories and images that in some way encapsulated the community as it existed in the imagination” (p. 654) of residents. Biggs et al. identify three levels of narrative meaning of retirement communities: as *represented* by the agency, *experienced* by residents, and *imagined* by residents.

Biggs et al. (2000) explore residents’ responses to formal organisational messages, and their comparisons with alternatives such as nursing homes. Residents positioned the alternatives in a negative light, and their retirement community in a positive light. At the second practical level, residents experienced their retirement community in terms of having security, support, and autonomy. The third level concerned residents’ narratives of their lived experience. Biggs et al. identified three “imaginative themes” (p. 666) about retirement community living which were expressed in residents’ stories. First was residents’ earnestness about the positive culture of the community which outsiders did not appreciate. Secondly, residents expressed the view that the retirement community was like “living in a palace” (p. 667). Thirdly, residents told stories that demonstrated how retirement community living positively affects peoples’ health and wellbeing. Biggs et al. argue that these three narratives contribute to a sense of community. This study is noteworthy for its links

between organisational representations and residents' interpretations and enactment of those representations. It also highlights the role of residents in creating narratives that constitute a viable culture of community.

In terms of management studies, one early study by Siegal and Storm (1968) explored the problems of a retirement community within a business management model. Siegal and Storm identified two types of residents: high political action (Hi Pols) and low political action (Lo Pols). The Hi Pols group was generally more involved and more concerned about the retirement community than the other residents: That is, members of this group were more likely to be involved in a greater range of activities and use more recreational facilities, and to express higher levels of satisfaction and dissatisfaction than Lo Pols. Siegal and Storm suggest that Hi Pols are generally "good citizens" while others "approximate the model of rest home patient" (p. 66). The first group was more closely aligned to the "kind of persons most desirable for residents in the sort of community represented by [this retirement community]" (p. 63). "Most desirable" referred to those "who were not interested in gaining power to wreck the community, but were much more intensively aware of community problems and more dedicated to resolving them" (p. 65); in other words, residents who were citizens.

Seigal and Storm (1968) go on to argue that with the new market of "the retired person who is financially self-sufficient, of good health, and of outgoing personality" (p. 66), a different model of management is required. They argue that developers need to maintain a "caretaker relationship with the communities after they are marketed" and should adopt a "more participation-oriented style of management" to address more effectively the interests of the "more vigorous aged" (p. 66).

While these studies may be broadly construed as communication oriented, few address the specific roles and activities of *organisational* communication. The closest examples of research involving organisations and communication, are Biggs et al. (2000), Laws (1995, 1996), McHugh

(2002, 2003), Mansvelt (2001, 2003, 2005b) and Graham and Tuffin (2004). Each of these studies has in some way examined organisational messages about retirement village living, and/or residents' responses to those messages. The critical gap in the literature emerges from the failure to treat retirement villages *as organisations* rather than as a social phenomenon and as places for older people to live. Although these studies highlight *organisational messages*, there remains an opportunity to examine retirement village communication within the discipline of *organisational communication*. Research within this domain problematises RVOs' internal and external communication, roles, activities, and interactions with residents', as well as the inter-relationships between these various aspects. That is, rather than treat the organisation as *a given* within the phenomenon of retirement villages, RVOs and a range of communication activities associated with them become *central* to the research focus.

Conclusion

This chapter outlined the New Zealand legal status of retirement villages, the main types available (life care and lifestyle), and the history of retirement village development. It also discussed the range of current research in the field. Most retirement village research in New Zealand seems to have focused on either residents' experiences of retirement village living, or retirement villages as a social phenomenon. To date, there is nothing in the way of research with an *organisational communication* focus. In particular there is no research on *residents' participation* in retirement villages *as organisations*. Thus, there is an opportunity to examine RVOs and their communication activities in both the public domain and the internal domain of the village. With these issues in mind, the next chapter examines important Western trends that have influenced the development of retirement villages internationally, in the context of marketisation, commodification, and the increasing influence of organisations.

CHAPTER 3

RETIREMENT VILLAGES: LINGUISTIC, HISTORICAL, AND CULTURAL CONTEXTS

Introduction

The purpose of this chapter is to provide an overview of the contexts that contribute to the ongoing development of retirement villages in New Zealand. The material is important because it provides a social context to the development of retirement villages in New Zealand. *Firstly*, I outline aspects of language, Western ambivalence towards ageing, and social changes which have helped to shape contemporary attitudes and practices related to ageing and older people. *Secondly*, I discuss the medicalisation of ageing and the economic and leisure-ised reconstructions of retirement, and *thirdly*, the shifts in government policies from welfarism to privatisation. This overview examines how these trends have contributed to a social and economic environment conducive to the development of retirement villages in New Zealand.

Language, Attitudes, and Social Change

In this section, I explore aspects of language and social practice as background conversations that have helped to shape and influence the development of retirement villages. These background domains concern the language of ageing, the position of older people within Western societies, and cultural contexts.

Ageing is an “unabashedly bodily” process according to Gullette (1997), but she advocates that “we should look first and hardest for constructedness” (p. 3). Such constructedness is located in “discursive formations” (Foucault, 1984) that naturalise societal structures and in so doing privilege some groups over others. Language plays a significant role in the social construction of ageing (e.g., Blaikie, 1999; Hazan, 1994; Koopman-Boyden, 1993b) because social construction is a function of

language (Berger & Luckmann, 1966; Burr, 2000; J. Potter, 1996). That is, language both reflects and constructs meaning. Attitudes towards ageing are demonstrated and constructed in language and images used in society. Language about or related to ageing, older people, and ways of living reflects, reinforces, and (re)shapes attitudes about ageing and retirement. In the following this section I discuss (1) the prevalence of negative terms, labels used to refer to older people, and the reclaiming of “oldness” in language; (2) discursive dimensions of ageism; (3) Western ambivalence about ageing; and (4) the implications of social change for today’s older people.

Language as Constructions and Expressions of Attitudes

There is a wide range of negative terms, images, and metaphors that refer to getting older or to older people themselves. One familiar metaphor for older age is “being over the hill”. A more recent metaphor emerging from consumer society is “past the use-by date”. Each of these metaphors suggests that the older person is past the optimal time of life. These are only two of many negative terms related to ageing; in fact, in English, there are many more negative than positive terms about ageing (Nuessel, 1982; Palmore, 1999). Moreover, the positive terms and images of older people generally lack the emotional intensity of the negative ones. Current words with positive connotations, yet supposedly neutral characteristics include “elder”, “senior”, and “mature”. Such terms are used in the marketing of products and services to older people (Blaikie, 1999; Featherstone & Wernick, 1995; Moschis et al., 1997; Sawchuk, 1995). Commonly associated with status, wisdom, or ripeness, they potentially generate positive and respectful attitudes towards age and older people. In contrast, negative terms usually evoke more vivid and negative images: for example, “codger”, “harridan”, “biddy”, and “coot”.

Evidence shows that the descriptive meaning of words associated with ageing is subject to elision in the context of negative attitudes towards ageing. The term “senile”, for instance, originally meant the later

stage of life (Kirk, 1992), while “to age” meant to grow old as in “to grow up” (Covey, 1988). Both of these terms now carry negative meaning. Growing old is now a metaphor for being out-dated. It could be said that Westerners want to grow up, but not to age or be senile.

Terms and phrases used to refer to older people are changing. For instance, phrases such as “older people” and “the retired” have become used instead of, although also alongside, “elderly” and “old people” (see Koopman-Boyden, 1987). “Older people” implies those older than others, in a similar way that “younger people” implies younger than others. Younger or older than whom is not always clear, but the term “older” avoids the unpalatable zone of the term “old”. As Huntsinger (1995) writes, “Elderly people hate those words [old people]. You can call them seniors. You can refer to them as mature. But old? Even calling them elderly is dangerous. Or aging” (sec. 2, ¶ 2).

Reluctance to being labelled “old” has generated a range of different language responses. Phrases such as “older and bolder” (e.g., Active Publishing, 2005) appear to reclaim ageing in positive terms. On the other hand euphemisms such as “new elders” avoid directly mentioning age. Meantime, there are also challenges to euphemisms for ageing. McHugh (2000) writes “the political satirist Mark Russell quipped that he tires of silly patronizing terms used in referring to elders: ‘Just be done with it and call me old!’” (p. 106). Fay Weldon (2006) also demonstrates resistance to notions of agelessness:

I am old . . . and “not young in heart” . . . It would be extraordinary if I were after all my experience of life, my years of work, the people I have loved, those I have lost, the places I have lived in, my friends who are dead and those who are alive, the births and growing up of my tall, handsome grandsons. (Sec. 1)

Another writer argues that to be “age-ful” rather than “ageless” captures the worth of the lived life experience (Andrews, 2000). In a world where

old increasingly means obsolete (Blaikie, 1999), reclaiming old-ness is an effort to make old age positive.

In the same positive vein there is a shift in the West generally towards talking about positive ageing (Featherstone & Wernick, 1995). In New Zealand this is evident in a range of public and private sector work (Dalziel, 2001; Dyson, 2002) of which the Positive Ageing Strategy (Dalziel, 2001; Dyson, 2004; Ministry of Social Policy, 2001) is a notable example. This document, which is intended to include a positive ageing approach in a range of social policy practices, advocates recognising the value of older people's "knowledge, skills, and experience" and "encourages older people to participate in their communities" (Dyson, 2004, p. 1).

Roles and labels for older people help to position them in particular ways that induce certain responses from society. Such labels include those related to age-stage, health status, income, and the capacity to participate in the market

There is a proliferation of terms identifying age-stage and health status. Fun-terms such as "go go" and "no go" (Blaikie, 1999, p. 75) are used to identify the health status of older people. Similarly, there are more conservative labels that differentiate between age-stages including, "new elders", "primelifers", "seniors", "young old", "old old", and "oldest old" (Blaikie, 1999; Covey, 1988; Huntsinger, 1995). Each of these labels implies some level of health. "Primelifers" conjures up images of people in good physical, mental, and even financial health. On the other hand it is doubtful that the term "oldest old" elicits similar images.

Historically, the term "pensioner", and in New Zealand "superannuitant", has been used to refer to people over 65-years. The latter has the same origin as pensioner in that it refers to a person in receipt of state income. However, pensioner became associated with isolation, disengagement, disadvantage, and poverty (Koopman-Boyden, 1988; Phillipson, 1998). In New Zealand, superannuitant is a term that has

political connotations (see Grey Power New Zealand Federation, 2004), as well as being an indicator of socio-economic position.

Another group of positional terminology defines older people in terms of their ability to participate in the market; That is, acronyms that denote the capacity to spend. “Woopies (well off older persons) . . . Glams (grey, leisured and moneyed)” (Blaikie, 1999, p. 77), and “Ski-ers” (spending kids inheritance) identify groups of older people with the capacity for discretionary spending. A less obvious label, but one which implies consumption is “OPALS—older people with active lifestyles” (Huntsinger, 1995, ¶ 43). The image of older-people-as-spenders is deemed positive, because it shows that they behave unlike previous generations of older people, and more like (younger) consumers. These terms imply a sense of youthful old age (Blaikie, 1999; Featherstone & Wernick, 1995). In contrast, the term “Neo-puritan” (Blaikie, 1999, p. 75) which means frugal or lack of spending either by choice or necessity is less “spender-friendly” and has more negative connotations.

In some respects these various terms avoid mentioning age specifically, and there are situations where references to older age can be difficult. A woman at a travel agent hesitates and pauses as she says to the agent, “we are in our seventies” (Ylänne-McEwen, 1999, p. 423). To disclose chronological age explicitly identifies the self within a particular age group and this can be difficult when it risks negatively categorising the speaker. Sometimes, references to age are dealt with indirectly; using the phrase “people like you” in a brochure targeting people over 50-years of age suggests shared interests rather than only shared age-group (Ylänne-McEwen, 2000, p. 86).

Whether the approach is reclaiming, reframing or neutralising language, there appears to be an avoidance of (negative) age-identifiers as well as a trend in changing language to reflect and construct positive attitudes towards ageing. Paradoxically, this shift towards a language of positive ageing while helping to socially reconstruct older age, also

heightens cultural desires for youthfulness and *distances even further* the natural material processes of ageing which remain almost unpalatable (Blaikie, 1999; Featherstone & Wernick, 1995; Phillipson, 1998).

Ageing, Ageism, and Attitudes

How we *talk* about aspects of human life impacts on how we *behave*, as well as on societal *practices* (Fairclough, 1993; Foucault, 1984). Thus, experiences of ageing are in part shaped by how we *talk* about ageing; how we behave towards ageing, and the services and organisations we create to cater for ageing people. This broadly discursive view does not exclude the material realities of ageing; rather, it highlights how societies interpret and construct ideas about and responses to ageing. This has particular significance for *ageism*.

Consider the phrase “a senior moment”. This is often used as a humorously intended comment to excuse and dismiss momentary forgetfulness. However, the phrase leans on two ideas. The first is that forgetfulness is a function of deterioration and the second is the association of older people with the word “senior”. Forgetfulness is thus framed as an issue of *ageing* rather than one of a number of other possibilities such as busy-ness, distraction, or stress. It is essentially *ageist* because forgetfulness is negatively characterised as a function of older age (see Nuessal, 1982). Thus, the comment communicates negative expectations of ageing and older people.

In broad terms ageism—“an ancient prejudice” (Gullette, 1997, p. 3)—is often associated with discrimination against older people (Butler, 1969, 1987; Bytheway, 1995; Bytheway & Johnson, 1990; Cole, 1992; Radford, 1987; Williams & Giles, 1998). Robert Butler originally coined the term “age-ism” in 1969, and later described it as:

a process of systematic stereotyping and discrimination against people because they are old, just as racism and sexism accomplish this for skin color and gender. Older people are categorized as

senile in thought and manner, old fashioned in morality and skills.
(1987, p. 22 – 23)

While Butler (1969, 1987) emphasises ageism in regard to older people, he and others (Bytheway & Johnson, 1990; Williams & Giles, 1998) point out that ageism can apply to younger people because they too can be discriminated against on the basis of age. Young people are often referred to as inexperienced, keen to impress, irresponsible, and lazy (Williams & Giles, 1998). One central difference though, is that while younger people may *grow out of* such ageism, older people do not. This broader application of ageism helps to demonstrate the socially constructed dimension of ageism, and ageing itself. To say that all living human beings age is a truism. Yet, when presented with the phrase “ageing people are everywhere”, it is questionable how many people would think of small children and not older adults; “people tend to only hear ‘old’ when the words *age* or *aging* are spoken” (Gullette, 1997, p. 4, original emphasis).

Historical (Western) Ambivalence about Ageing

A review of history reveals negative and ambivalent attitudes towards ageing. These feelings are evident in expressed ideas, theories, and images of older people in Western society. The central features of this ambivalence are discussed here.

The historically negative emphasis on ageing is well documented (Blaikie, 1999; Butler, 1969; Cole, 1992; Covey, 1988; Featherstone & Wernick, 1995; Kirk, 1992; Koopman-Boyden, 1987, 1993b; Nelson, 2002; Palmore, 1999, 2000; Phillipson, 1998; Radford, 1987). Growing old is traditionally associated with disability, decline, illness, uselessness, depression, loneliness and loss of attractiveness, strength, and health (e.g., Kirk, 1992; Koopman-Boyden, 1987, 1993a; Palmore, 1999). These negative consequences of ageing centred on physical and mental deterioration were seen to result in social effects, such as poverty and destitution and often associated with deprivation. In short, in Western society “there are few

images of old age as an unequivocally enviable state" (Martin, 1990, p. 62). However, the images and experiences of older people in society can be contradictory. Minois (1989), for example, notes that in 16th century Europe there were "flagrant contradictions" between the actual roles of "old people" in society, economy, politics and art, and what was said about them. He writes that "old people made up a cohort of sovereigns, ministers, warriors, diplomats, merchants, churchmen" (p. 288) and yet older people themselves were "vilified". He contends that:

At a time when modern propaganda was yet unknown, this was the *opinion generally held by independent people*, the thinkers, writers and artists, whose personal feelings were inspired by the context of their age, by tradition and intellectual trends. There were no newspapers, radio or television to provide society with models. Very few men [*sic*] during the 16th century ever saw their rulers . . . whose existence was demonstrated only by their decisions, their taxes, their wars, and their justice. *Power and opinion evolved independently, taking no account of each other. . . .* the old were held in low esteem on the one hand, whereas they were being given more responsibility than ever before by their governments. (Minois, 1989, p. 288, emphasis added)

This quote illustrates three important points. The first is the division between *beliefs* and *social practices*. Minois shows that negative attitudes of ageing are present even when the lived experiences of older people and societal structures contradict them. Secondly, in juxtaposing *roles* held by older people with *opinions* of "the old", Minois brings into sharp relief that "getting old" is seen as something that happens to others and not the people who comment on it (also see Palmore, 1999; Radford, 1987). Thirdly, in noting the absence of propaganda, Minois suggests that it is *ideology*—shared beliefs—and "mental models" that shape social practices (van Dijk, 2001b, 2004) rather than models presented in mass communication programmes. One final note: In an era of high infant mortality and short life-expectancy, it was estimated that only 5% of the population lived beyond 60-years of age (Hibbert, 1987). Thus, Minois also

provides an example of how old age is socially constructed rather than determined chronologically.

Negative attitudes towards ageing are also evident in Western 20th century theories of ageing which tended to focus on older people's lack of involvement with "mainstream" life. For example, disengagement theory (Cumming & Henry, 1961) treated ageing as "inevitable mutual withdrawal or disengagement resulting in decreased interaction between the ageing person and others in the social system he [*sic*] belongs to" (p. 14). In contrast activity theory (Havighurst, 1963) asserted that older people maintained activities and roles they developed during their lives. The underlying assumption was that the more active the person was, the more satisfied they were likely to be with their lives. Continuity theory (Havighurst, Neugarten, & Tobin, 1968) and life course perspectives (Neugarten & Hagestad, 1976) asserted that older people have both the need and tendency to maintain the routines, habits, and perspectives of a lifetime.

While these later theories challenged disengagement theory, they focused on individual activity and "mainstream" life. Older people had to "adjust from lives centred on the culture of the workplace to a socially impoverished future where they would be occupied in a losing battle with boredom" (Blaikie, 1999, p. 61). Within these frameworks, successful ageing relied on either maintaining mid-life social patterns, or taking up new ones to forestall what Gullette (1997) calls "declineoldageanddeath" (p. 8, original format). Such casting of the older person's world as non-mainstream is noteworthy in itself, for it suggests "otherness" or a lesser kind of life. Moreover, these theories have been criticised because they focus on the individual and take little if any account of social structures and issues (Estes & Associates, 2001; Phillipson, 1998).

Older people have been depicted as both denigrated and revered and the coexistence of such views in Western society has resulted in a general ambivalence about old age (Blaikie, 1999). Many writers in the

field agree that in Western societies there “never has been a golden age for the elderly when they were thoroughly venerated and honoured solely on the basis of their age” (Covey, 1988, p. 292).

A central key to valuing older people seems to lie in the ownership or control of personal and communal resources. Historically, older people have been valued for their expertise, past achievements, being transmitters of traditions and wisdom, and even their relative rarity (Achenbaum, 1974; Blaikie, 1999; Cole, 1992; Covey, 1988; Fischer, 1978; Minois, 1989). In societies where these factors were accompanied by ownership or control of land, means of production, or accumulated wealth, older people maintained positions of authority, respect, and power (Binstock & George, 2006; Blaikie, 1999; Covey, 1988; Fischer, 1978; Phillipson, 1998).

In this current age of consumption, it may be said that older people are valued for their life-long accumulation of wealth (Blaikie, 1999) and therefore their capacity to spend. Older people who control sources of wealth creation also retain status and power in society (Blaikie, 1999; Phillipson, 1998). One group of older people in the US created a “self-planned housing development for the elderly” (Brown, 2006, p. A1). Twelve friends around 80 years of age, bought land, hired an architect, and lobbied for a zoning change to build a small retirement community. At the time of writing, they also had plans to employ a nurse to provide care if needed. Brown states that this group is “by no means typical. They are all accomplished professionals, and the market value of their [existing] homes allowed them to . . . build their dream at a [total] cost of \$3.3 million . . . plus \$350 a month [each] in dues” (2006, p. A16). Clearly Brown views these people as atypical in terms of their financial resources, professional backgrounds, and capacity to organise such a development. While their ages and project may make these people newsworthy, it is the combination of other individual and socio-economic factors that enable them to exercise power and make choices.

Respect for older people because of their socio-economic status ameliorates but does not eliminate negative orientations towards ageing. Physical and mental deterioration and associated social consequences remain powerful images of growing old and powerful influences on attitudes and practices. Margaret Gullette (1997) calls this “decline narrative ... a ‘master narrative’” (p. 9) which as a “shared cultural script” (p. 7), impacts on attitudes towards, and experiences of ageing. This was demonstrated recently in an advertisement for an advertising agency. The agency was promoting its services used images of older women in lingerie with the tag-line “older models don’t cut it anymore” (Sideswipe, 2005). In attempting to communicate the idea that old styles of advertising were no longer effective, the advertisement used images of older women to represent these outdated models. The advertisement was withdrawn after complaints that the advertisements were “ageist” and implied older women were beyond their “use-by-date”. This example illustrates how ingrained and powerful negative images of ageing are.

It is interesting to reflect on a statement by Gilleard and Higgs (2000):

Age has proved to be a politically inert form of identity. . . . Age does not sell either such obvious consumables as cars and clothes or those more subtle commodities that constitute “issue” and “identity” politics. Marginalized as a civic status, public “agedness” conveys little beyond vulnerability and risk. Those older people with sufficient material and cultural capital to attract the interest of retailers are not seduced by appeals to their aged status. Their social value lies in being “still young”. . . . (p. 70–71)

Here Gilleard and Higgs put into sharp relief the dual images of the vulnerable older person and resource-full, ageing-resistant older person. Age commands no status on its own, and poor and vulnerable older people are relegated to the role of “diffuse ‘other’ who inhabits the . . . broader community” (Gilleard & Higgs, 2005, p. 118). On the other hand, the resourced older person claims other identities associated with

youthfulness and resists ageing “through consumption as the only means of staving off decline” (Trethewey, 2001, p. 186).

While there is some literature that provides evidence of venerated and respected positions of older people in non-Western societies (Achenbaum, 1995; Koopman-Boyden, 1993a; Minois, 1989; Nelson, 2002), “very few studies have considered how a target’s race or ethnicity affects evaluations of older adults” (Kite & Smith Wagner, 2002, p. 144).

Trethewey (2001) says there has been little research in the area of sexism and ageing, and notes that “calls for intersectional research have been largely silent about the issue of age” (p. 222; also see Gullette, 2004). Given, that it is generally accepted that beliefs are influenced in complex ways by race, gender, and social class it would seem that attitudes towards ageing and older people would be similarly influenced (Kite & Smith Wagner, 2002).

Margaret Gullette (1997) suggests that among the few who can escape the “mainstream ideological training” (p. 8) of the decline narrative, are those raised in non-Western culture. Within New Zealand key differences have been identified between attitudes towards, and expectations of, older people within Māori (indigenous people) and Pākehā (non-Māori, Caucasian, [P. Ryan, 1999]). Durie (1999) writes, that “despite several generations of Western influence, Māori society generally retains a positive view towards ageing and elderly people” (p. 102). Unlike many older Pākehā, Kaumātua (elders) are seen as revered holders of the traditional knowledge and many are involved in social and political roles in both Māori and broader Aotearoa New Zealand society (Maaka 1993; Durie, 1999). This brief example illustrates the powerful role of cultural contexts in determining societal responses to ageing and older people.

In summary, current images of ageing and older people communicate representations that generate and mirror a range of ambivalent messages about ageing (Featherstone & Wernick, 1995).

Ageing in Western society is largely characterised by a decline narrative and a general ambivalence. Not a positive status in itself, older age relies on other cultural resources to be successful. In the light of the above, it is useful to contextualise the development of retirement villages with reference to social changes in New Zealand. This is the focus of the next section.

Social Change in New Zealand

The period since the Second World War has been one of tremendous change in New Zealand (Rice, 1994b) and other Western nations. The nature and size of the changes during this time have contributed to enormous shifts in attitudes, expectancies, and lifestyles of the current generation of older people in the West (Gilleard & Higgs, 2002, 2005). The current generation of older people entering “retirement” is sometimes referred to as “the third age” (Blaikie, 1999; Gilleard & Higgs, 2002, 2005; Laslett, 1989) and significantly, characterised by a greater sense of agency and as having more choices than previous generations (Laslett, 1989).

Today’s older people may be considered a generation in that they have lived through multiple societal, technological, political, and cultural changes, particularly during the 1950s and 1960s (Gilleard & Higgs, 2002, p. 373). Using Mannheim’s (1927/1952) definition of “generation”, Gilleard and Higgs argue that as a generation 21st century older people have not only experienced fundamental societal changes, but as a birth cohort possess an awareness of the resulting potential for them. This has ramifications, not only for current older people but also for future generations, including the ways in which retirement and older age are conceptualised and manifested in society.

The New Zealand experience is consistent with international trends in industrialised countries with ageing populations and increasing numbers of older people (Khawaja, 2000). Between 1951 and 2001, the number of people aged 65-years and over more than doubled to over

450,000 people. The number of people aged 65-years and over will double again in the next 50 years (Statistics New Zealand, 2002). In addition, the life expectancy of men and women aged 65-years has also grown to 15.5 and 19 years respectively (Khawaja, 2000). Thus in New Zealand, people aged 65-years and over are a numerically and proportionally greater part of the population than at any other time in New Zealand history. It is reasonable to assume that increasing numbers of older people increase the visibility of older age groups, and possibly affect – in either direction – attitudes towards, and expectations of, older people.

There are many examples of older people becoming politically active (Age Concern New Zealand, 1992, 2001; Glasgow, 1998; Grey Power New Zealand Federation, 2004) with a sense of agency not evident in earlier 20th century New Zealand. Charitable and welfare organisations working on behalf of older people were common in the late 19th century and early 20th century (Saville-Smith, 1993; Tennant, 1989). The current focus has changed to one of recognising the special needs of older people and encouraging the recognition of their skills and involvement in addressing them (e.g., Dalziel, 2001; Dyson, 2002). Such changes in the sense of agency and self-determination of older people must influence how organisations present and deliver their services and products to older people as well as the development of residential facilities. Retirement villages which specialise in meeting both social and health needs of older people, is one area where issues of agency and self-determination are becoming ever more apparent.

The increasing number of older people in New Zealand, as well as their growing political awareness and sense of agency have implications for retirement villages in several ways. Although retirement villages are currently an alternative to traditional forms of housing for older people, other forms of housing may also emerge in response to the growth in the population over 65-years. In addition, retirement villages are likely to be subject to more scrutiny at individual and public levels. This has already

begun at with the enactment of the Retirement Villages Act 2003 and the Retirement Villages Code of Practice (2006). While social change in New Zealand has certainly had an impact on the rise of retirement village, other cultural trends have also influenced their emergence as a social phenomenon. Such influences are the focus of the following section.

Medicalisation of Ageing and the Emergence of Retirement

In this section I review global trends that have contributed to the development of retirement villages in New Zealand. These are the medicalisation of ageing and the counter response of positive ageing; the emergence of the socially constructed institution of retirement and the subsequent leisure-isation of it; and the rise of lifestyle within a consumer society.

The Social Trend of Medicalisation

Medicine is one of the most powerful and pervasive forces in the 20th century (Estes, et al., 2001). Although geriatric medicine brought a new approach to ageing by focusing on the diseases of old age (Kirk, 1992), ageing became almost synonymous with medical problems (Blaikie, 1999; Estes, 1979, 1993; Estes & Binney, 1989; Estes et al., 2001; Phillipson, 1998). This process became generally known as the “medicalisation of ageing”. Medicalisation of ageing involves the *framing of material ageing* in terms of medical concepts such as pathology, diagnosis and treatment, and developing societal systems that align with a medical perspective and facilitate its ongoing application. In terms of *practice*, medicalisation concerns treating ageing as a medical problem; “a process in which the medical community attempts to create a *market* for their services by redefining certain events, behaviours and problems as diseases” (Koopman-Boyden, 1988, p. 632, original emphasis).

In short, the *medicalisation* of ageing refers to the ways in which medical professions, pharmaceutical companies (read organisations), and

their interventions influence and control the lives of older people (also see Blaikie, 1999; Phillipson, 1998). As Estes (1979) writes:

The equation of old age with illness has encouraged society to think about old age as a pathological, abnormal, and undesirable state, which in turn shapes the attitudes of members of society toward the elderly and of the elderly toward themselves. (Estes, 1979, p. 46)

Estes makes an important point here: that older people themselves hold attitudes that ageing is a negative state. This should come as no surprise, because as members of society, they experience, absorb, and enact social values of the social groups they live in (Berger & Luckmann, 1966).

Saville-Smith (1993) describes the process by which ageing became medicalised in New Zealand in her analysis of the role of the state in the social construction of ageing. She suggests that the enactment of the Old Age Pensions Act 1898, combined with the Hospital and Charitable Institutions Acts of 1885 and 1909 resulted in two outcomes for older people: institutional care within medical settings, and non-productive economic status at age 65. Older people and society in general accepted institutional care *for their own good*. Thus, “[t]he foundations of the medicalisation of ageing and the social construction of ageing as illness were then set” (Saville-Smith, 1993, p. 84).

In defining old age as increasing physical and mental dependence, Saville-Smith (1993) following Foucault (1984) argues that medicalisation serves as a means of social control. Saville-Smith takes the view that the medicalisation of old age enabled older people to be “systematically excluded from social and economic life” (1993, p. 76). Medicalisation influenced social parameters of choices of older people and one such social institution was that of retirement age (Blaikie, 1999; Koopman-Boyden, 1993a; Phillipson, 1998). Societal norms were such that from age 65-years, physical and mental dependence were seen as inevitable. This inevitability manifested in the need to withdraw from paid employment and accept the socio-economic options available at this time of life. These options may

have included receiving financial support by way of a pension or accepting medical and financial assessment for access to care and accommodation. Such life choices became a part of widely accepted rituals, life transitions, and rites of passage for older people in society.

In sum, attitudes and beliefs about ageing as medically defined results in social institutions and ways of behaving that guide individuals to interpret and construct the experience of ageing as one of deterioration – the ageing-as-decline master narrative (Gullette, 1997, 2004). In practice this means accepting medical diagnosis and interventions, and hospitals and nursing homes as normal responses to meet the material and perceived needs of older people. In this regard retirement villages became seen as extensions of old-age homes where the name is different but residents' roles remain passive. This view may seem unrealistic until the power of institutional communication is taken into account. Actual numbers of older people in care are relatively small (less than 2% of the total population over 65-years according to Statistics New Zealand, 2002), but the *images* of older people in care and the practices of policy makers and professionals give the impression that large numbers are in care (Hugman 2001). Thus, the increasing number of retirement villages may continue to maintain such impressions.

The Social Construction of Retirement

The purpose of the following discussion is to highlight the influence that eligibility for pensions and superannuation has had on retirement, its timing, and associated practices and attitudes. Some (Koopman-Boyden, 1993; Saville-Smith, 1993) argue that while the old age pension provided limited financial support for older individuals, it was also a contributing factor in the social construction of ageing. In other words, pensions helped to develop retirement as an accepted social institution in New Zealand and other Western societies. Moreover, as the premise on which the old age pension was offered shifted from need to

entitlement, and as the age of entitlement became stipulated in employer schemes, so the idea of retirement as compulsory became accepted.

Retirement as a concept and practice developed during the 20th century into a cultural norm (Blaikie, 1999). Although the practice of retiring people from positions of employment because of infirmity and old age had existed for centuries, the practice of providing the funds to live in old age was restricted to very small sectors of society. For the most part, prior to the provision of the old age pension, retirement was limited to those of independent means, if it happened at all (Fischer, 1978; Hibbert, 1987; Minois, 1989; Rosenthal, 1990). On the whole, most people worked till they dropped (Blaikie, 1999; Laliberte Rudman, 2006). It was not until the development of old age pensions in Western countries from the late 19th century that retirement for older people became generally possible. Ironically, this social policy initiative also facilitated the institution of compulsory retirement. Koopman-Boyden (1988) described compulsory retirement as an ageist and discriminatory practice, because it limited the choices of people 65-years and over. In short, retirement has moved from being available to a privileged few, to being mandatory for all those 65-years and over, and to currently being a matter of interpretation and choice.

The social institution of retirement resulted, in part, from improved financial and health status, and increasing longevity, which have implications for expectations about the “right age” and reasons for retirement, and the length of time spent in retirement (Blaikie, 1999). The ageing of the population created economic pressures due to more people in the labour market, and therefore, retirement developed as one societal mechanism for statutory removal of older people from the workforce in order to enable younger people to join it (Blaikie, 1999). Retirement developed “as a social phenomenon created by legislation, policies and attitudes held in society” (Koopman-Boyden, 1988, p. 688) and became a “rite of passage” – a life experience for a certain stage of life.

The Old Age Pensions Act 1898 was the first financial support offered by governments that related to ending work life. In New Zealand, this was initially a social policy response to poverty and lack of employment among increasing numbers of older people (Olssen, 1994; Saville-Smith, 1993). The young immigrants of the 1860s and 1870s were ageing, and had become a larger proportion of the population (Olssen, 1994; Saville-Smith, 1993). Affected by downturns in the labour market and without familial support, an increasing number of these older people – largely single men – were without the means or support to live (Saville-Smith, 1993). Means tested, the old age pension provided older people over 65-years with a measure of income at a time when their opportunities and capacities to work (often in hard manual jobs) were seen as diminishing (Saville-Smith, 1993).

Eligibility for the New Zealand old age pension became increasingly easier with the lowering of the entry age in the early 1900s. In certain circumstances public service pensions were available to women aged 50-years and men aged 60-years. This is at a time when there were approximately 31, 000 people over 65 years of age with a shorter life expectancy than people over 65 years of age in 2001 (Statistics New Zealand, 2002). Significantly, in 1938 a universal benefit was introduced for people over 65, while the “age benefit” (Old Age Pension Act) was available by means test for people aged 60-years (Dunstall, 1994). In 1977 the universal benefit became available for people over 60-years (Dunstall, 1994; McRobie, 1994; Rice, 1994a). This extension of universal superannuation was significant because it reduced poverty among older people generally, with women and Māori benefiting in particular, and provided additional income to those who were still working or had private retirement income (Else & St John, 1998; Kelsey, 1995). Further changes in 1992, however, resulted in reduced income levels and a (gradual) return to the 65-year entry point (Kelsey, 1995; O’Brien & Wilkes, 1993).

From one point of view, the provision of a state-funded retirement income clearly benefited improved living conditions among older people. From a macro perspective however, these financial systems may be seen as bringing about the systematic exclusion of older people from the workforce (Blaikie, 1999; Phillipson, 1998; Saville-Smith, 1993; Walker, 2006) and therefore helping to normalise the practice of retirement at a stipulated and accepted age. It was only in 1998 with the Human Rights Act that compulsory retirement was abolished in New Zealand (Human Rights Commission, 1998).

Economic (re)construction of retirement.

The contrasting perspectives of retirement as a “life crisis” on one hand and a “life choice” on the other (Blaikie, 1999), illustrate how material practices can be explained to suit the social conditions of the times. For instance, during the prosperity of the 1950s and 1960s, retirement was constructed as a time of “crisis and sickness [and] worth delaying at all costs” (Blaikie, 1999, p. 63). In contrast, during the economic downturn and mass unemployment of the 1970s and 1980s, retirement was “reinterpreted as active choice” (Blaikie, 1999, p. 63).

The New Zealand experience supports Blaikie’s (1999) view. In New Zealand the mass layoffs of the late 1980s and early 1990s were termed “redundancies”. Although the term redundancies meant that the *jobs* were eliminated, being “laid off” was often a personal issue for individuals: “I’ve been made redundant” was a common statement to be heard. Therefore, for older workers, redundancy was often referred to as “early retirement” (Phillipson, 1998). At a time of compulsory retirement and the *right* to work until 65-years of age, “early retirement” offered older workers a more acceptable and respectable option than redundancy. Early retirement (re)framed job cessation as a choice, because older workers had the right to work until the age of 65. The choice allowed older workers to leave the workforce with their dignity intact, even if *asked* by employers to take early retirement.

Two important points can be derived from these different constructions of retirement and the use of diverse terms: Firstly, that retirement is a social construction linked to material reality; and secondly, that different terms communicate meanings to suit changing individual and social situations as well as historical periods.

From a communication perspective, developments of retirement and associated pension policies helped to reinforce long-held views of ageing. This is because the communication power of policy makers and professionals to “act on their ‘knowledge’ of old age” (Hugman, 2001, p. 57) is much greater than those who may be considered as “old”. He writes:

The power/knowledge of political, medical and welfare interests sustains a construction of old age as frail, poor and dependent, despite the different realities experienced by different older people. (Hugman, 2001, p. 57, original emphasis)

In the context of retirement, Hugman’s statement translates to mean that agents such as powerful interest groups and organisations are in a better position to communicate their view of retirement and retirees than retirees themselves. In so doing, the representations of these agents become accepted as the norm. Retirement villages organisations in contrast represent retirement village as “lifestyle shopping” (McHugh, 2003, p. 172) and questions need to be asked about the implication of such representations for older people and understandings of retirement.

Further (re)construction of retirement.

As retirement became defined as a period of old age spent outside the workplace, it gradually developed a tone of active leisure (Blaikie, 1999; Erkedt, 1986; Featherstone & Hepworth, 1995; Phillipson, 1998). To begin with, retirement was defined by what it is not: that is, not paid work. Blaikie notes that how leisure is defined may depend on the type of paid employment as much as access to disposable income. For example, “for some [people], leisure represents an extension of work, but for others it functions as a contrast” (p. 65).

Whatever the case, retirement became a period of active leisure where “active” was seen as synonymous with “positive” because it offered an alternative image to the traditional stereotypes of ageing as decline, senility, and illness. Thus, images of active ageing became cultural resources that enabled the construction of ageing in new ways (Featherstone & Wernick, 1995). The notion of activity is seen in the positive ageing discourses found in a range of media including social policy developments such as Health of Older People Strategy and Positive Ageing Strategy (Dalziel, 2001; Dyson, 2002); interest groups such as Age Concern and Grey Power; and marketing and promotion of products for “retirees”, “mature consumer”, the “senior” or “mature” market (Chaney, 1995; Sawchuk, 1995; Ylänne-McEwen, 1999, 2000).

Ironically, this notion of active leisure in combination with material security by way of state funded pensions, resulted in a “restructuring of the life course” and the retired person being socially constructed as a “leisure participant” (Phillipson, 1998, p. 37). Moreover, as Western societies created more disposable income, more was spent on leisure activities, and the roles and social identities of older people changed. As Blaikie (1999) points out:

[Commodities] are increasingly “read” as positional goods, that is, they are used to distinguish members of one social group from another. Thus . . . social identity increasingly relies upon what one buys, how one dresses, what sports one plays or where one goes on holiday. *What one does with one’s leisure time has become highly relevant, and, to the extent that retirement is a form of leisure, we must recognise that it is now a period characterised by rather more than simply being non-productive.* (p. 59, my emphasis)

In this respect then, retirement becomes “deinstitutionalised” (Blaikie, 1999; Phillipson, 1998) in that older people are no longer forced to exit the workforce. At the same time, in the context of the leisure-lifestyle market they are re-positioned as consumers within the senior or mature market. Ironically, chronological age has become a defining criterion for the market as the numbers and diversity within this “market segment”

have developed (Blaikie, 1999; Chaney, 1995; Sawchuk, 1995). As Blaikie (1999) notes, older people “are increasingly portrayed as niche markets of self-reliant customers” (p. 59). One such niche market is retirement lifestyle which hinges on leisure and choice. In this way then retirement and lifestyle are presented as commodities to be bought and sold. Retirement villages incorporate retirement as a life-stage, lifestyle, leisure, and habitat in the product which is the retirement village.

Another trend of the late 20th century that has facilitated the development of retirement villages in New Zealand has been the shift from rights-based to safety-net-based welfare policies. This shift, along with the associated neo-liberal discourses of individual responsibility are the focus of the next section.

Shifts in Values: From Welfare State to Market Model Discourse

In the 1980s New Zealand underwent what some described as the dismantling of the welfare state (Castles, Gerritsen, & Vowles, 1995; Kelsey, 1993, 1995; New Zealand Public Service Association, 1989; Rice, 1994a). It is important to note that these changes took place within a global trend of moving away from welfarism towards market oriented and privately run services. Often called the “New Zealand experiment” (Kelsey, 1993, 1995), New Zealand however, was not alone in going down the path of welfare restructuring (Castles et al., 1995; Walker & Walker, 2000) and shifting state-funded provision of retirement income and health services to private provision (Estes & Associates, 2001; Phillipson, 1998). These policy shifts took place within a broader context of a discourse of “individual responsibility” which was located firmly within neo-liberal economic and market ideology.

In line with the neo-liberal aims of minimising the state’s intrusion in individual lives . . . the ideal “retiree”, like the “good” neo-liberal citizen, is to care for the self, substantially through their own labour and by availing themselves of private market solutions. (Laliberte Rudman, 2006, p. 195)

Thus, the extent to which older people were judged “responsible” was evident in the kind of retirement “lifestyle” available to them (Gilleard & Higgs, 2000).

The move from welfare economics to market economics created tension between traditional views of social obligation and the new developments of individual responsibility. Prior to 1984, New Zealand was a moderate welfare state, but by 1994 had shifted to a market-driven model. The reforms were marked by a move away from a “‘cradle to the grave’ rights-based welfare state towards the opposite extreme of a residualist ‘safety-net’ model” (Rice, 1994a, p. 496). Policy emphasised individuals preparing for and looking after themselves in old age.

One example of these policy changes concerned the Government introduction of a new system for asset and income testing for older people in residential care (Else & St John, 1998; Kelsey, 1995; St John, 1993). Residential care included both rest home and “geriatric” hospitals – an increasing number of which were now being run privately. Although public pressure forced the government to cap weekly fees for long stay hospital and rest home care, older people in care could retain only small amounts of money (Else & St John, 1998; Kelsey, 1995; St John, 1993). In 1998 asset testing for hospital care was removed; however the assessment for both asset and incomes testing remained complicated.

No longer was social obligation the driver for providing for older people. Rather, state assistance by way of superannuation and health services was seen to “prevent dire poverty in old age, but little more” (Rice, 1994a, p. 495). This shift constituted a significant change in the social construction of ageing. If unable to provide for themselves, older people were now more likely to be constructed as health and financial “dependents” (Else & St John, 1998; Rice, 1994a; St John, 1993; Walker, 2006) rather than as rightful recipients of deserving support for past contributions to society.

Flow-on effects of privatisation.

Privatisation of government services played a role in enacting the discourse of individual responsibility. Privatisation is characterised by several strands of activity that shift state responsibilities and concerns to the private sphere (Chew, 1989; Fairbrother, Paddon, & Teicher, 2002).

Two relevant to this study are:

- The contracting out of services and operations traditionally provided by the state such as residential care;
- Financial privatisation where funding is achieved through both government support and user-charges, and where the government retains responsibility for provision of services such as medical care.

Moreover, the process of “corporatisation” was an integral part of privatisation in New Zealand. Corporatisation involves the restructuring of state-owned agencies from a service to a business model of operation with annual income and expenditure accounts, and an assets and liabilities balance sheet (Fairbrother et al., 2002). In New Zealand the State Owned Enterprises Act 1986 created agencies which the government retained as trading enterprises but which were monitored by financial markets (Chew, 1989). These agencies included “crown health enterprises” which were publicly owned hospital and community health services corporatised to run like businesses. Thus, within the context of the neo-liberal economic ideology, the discourse of individual responsibility transfers control from the state to accountable organisations and (some) payment responsibilities to users.

For older people, the effects of privatisation were experienced at the individual level through the contracting out of residential care services and user-pays for health services. The new rules for superannuation and residential care services helped to create a divide between “haves” and “have-nots” and therefore constructed two groups of older people: one as “responsible” (and by implication *independent*) and the other as

“dependent” (and by implication *irresponsible*) (Else & St John, 1998; Kelsey, 1993; Saville-Smith, 1993; St John, 1993). Gone was the social construct of the “deserving poor”.

With respect to superannuation, those who relied solely on superannuation were financially in need while those who had additional resources could ignore superannuation or consider it a bonus. In terms of residential health care, the wealthy could either “rearrange their income and assets in such a way that they minimise any obligation to pay” or, if they could afford to pay, “afford to leave their assets untouched” (Else & St John, 1998, p. 201).

In this context such divisions created a two-tier model of access to services. Those who could afford to, could purchase private health services and accommodation that were not available through state funding. For this group, alternative residential options such as retirement villages became a viable option. For those less well off, the choices were limited to local body/council pensioner flats, publicly-funded rest homes and hospital facilities.

These changes in retirement income and subsidies for aged care helped to create a climate change. *From a practical perspective*, for those organisations wanting to develop healthcare facilities for older people, retirement villages became a way of capturing the resident on a “conveyor belt” from independence to dependence. Retirement villages could also provide an additional business formula in terms of taking advantage of the financially independent older person for whom the New Zealand state pension was a bonus payment. *From a philosophical perspective*, retirement village living endorsed values of being self-sufficient and individually responsible. Retirement villages offered people a way of looking after themselves in older age.

As the state withdrew from funding the development of residential care, and as local bodies continued to run down existing stocks of pensioner houses, a stark difference developed between welfare and

private facilities. Images of old age homes as places of last-resort were joined by emerging images of retirement villages promoting lifestyle and security. Such images presented an alternative to a generation of older people for whose parents this had not been an option. From an economic perspective, it is of little surprise that the New Zealand retirement village sector grew rapidly during the 1990s.

Summary and Conclusion

Retirement villages have not developed in a vacuum. Their genesis in New Zealand is situated within a mix of local and global social influences, both historical and contemporary. Ambivalent attitudes towards ageing are both reflected and generated in language. That New Zealand Māori view older people differently from Pākehā is one example of how ageing is a cultural process of social construction as well as a material reality. At a socio-political level, the Charitable Institutions Acts of 1885 and 1909 and the Old Age Pension Act 1898 were structural responses to a changing and ageing New Zealand population. At a global level, three trends – the medicalisation of ageing, the development of retirement as a societal institution (and one increasingly seen as a period of leisure), and the shift from welfarism to privatisation – have contributed to a new construction of older age.

Retirement villages have developed in response to changing social and economic environments discussed in this chapter. RVOs are formal organisations as well as places of residence for older people, and in this respect may be seen as part of another Western trend: the increasing role of organisations in society, particularly during the 20th and 21st centuries. The changing role of organisations and the benefits of locating this study within the field of organisational communication are discussed in the next chapter within a conceptual framework which also includes consumption, identity, leisure, and marketisation.

CHAPTER 4

THEORETICAL LENSES FOR THE STUDY: CONSUMPTION, MARKETISATION, AND ORGANISATIONAL COMMUNICATION

Introduction

The purpose of this chapter is to present the theoretical concepts for the research and articulate the support behind them. The central concepts discussed are commodification, consumption, marketisation and organisational communication. These concepts are important because they act as lenses through which to explore the various dimensions of retirement villages including the promotion of retirement village living, the consumption of leisure lifestyles, the work practices of employees, and the everyday lived experiences of residents.

The *first* section of the chapter examines consumption, identity, and leisure. As a foundation to these concepts, I begin this section by discussing the commonly understood symbolic and material processes of commodification. The *second* section explores various dimensions of the multi-dimensional theoretical concept of marketisation. I begin with examining “the market” and shift from generally economic to communicative understandings of it. I then explore four market-oriented values – choice, competition, customer focus, and entrepreneurship – in relation to retirement villages. Marketisation as a penetrating process and as a universalising discourse are examined before focusing on implications of marketisation for participation in society and more specifically in retirement villages. The *third* section explains organisational communication as a field within which to locate this study of retirement villages. It begins with a brief historical account of the development of organisations and then discusses trends of organisational communication relevant to this research. This section finishes with an overview of promotion, a primary communication activity of organisations.

Consumption, Identity, and Leisure

Understanding the processes of commodification is fundamental to any discussion on consumption. Therefore, this section begins with examining common understandings of commodification, before exploring relationships between consumption, identity, leisure, and work.

Commodification: Symbolic and Material Processes

The term “commodification” first came into common usage in the 1970s (Basgen & Blunden, 1999/2005; Strasser, 2003) and is now, in everyday terms widely understood to refer to the progressive commercialisation and industrialisation of the natural world (Desmond, 1995). However, the *processes* to which the term refers were in evidence long before then (Basgen & Blunden, 1999/2005; Marx, 1867/2000; Strasser, 2003). There are now many examples of products and services once provided on the basis of their intrinsic or societal value, that are becoming marketised and undergoing commodification (Gottdiener, 2000; Strasser, 2003). The growing group of new commodities includes education and religion (Fairclough, 1993), healthcare (Estes, 1979; Strasser, 2003), culture, leisure (Featherstone, 1991; Lee, 2000), and ageing and retirement (Blakie, 1999; Featherstone & Wernick, 1995; Laws, 1993; McHugh, 2003). However, as Lee (2000) notes, commodification is not the issue, but rather the context in which commodification occurs: That is, identifying what it is that is being commodified, the producers, intended consumers, and actual consumers. For each and every commodity, the variables will be different (Lee, 2000, p. xvii) and therefore, it is important to ask *what happens* when something is commodified.

One commonly understood meaning of commodification, which has been the focus of much discussion (Desmond, 1995; Gabriel & Lang, 1995; Gottdiener, 2000; Lee, 2000; Lury, 1996; Schor & Holt, 2000), is the *colonisation* of use-value by exchange-value (Marx, 1844/2000) and sign-

value (Baudrillard, 1988/2000). Use-value has been described as the properties of a commodity that satisfy human need and possess intrinsic qualities that can be realised without reference to exchange-value (Featherstone, 1991; Marx, 1844/2000). One example of such colonisation is the replacement of informal support networks for older people by fee-for-service home-help agencies (Laws, 1996). Older people can now buy a wide range of home services including, housework, home maintenance, gardening, as well as personal care such as showering, and nursing care. In New Zealand, many of these jobs were once undertaken by the individuals themselves and/or by family members. The investment of time in carrying out such tasks suggests they had use-value for the people involved. The *paying* for such activities shifts them from use- to exchange-value: they are services to be paid for (commodities), rather than tasks requiring the investment of one's own (or one's family's) effort and time.

The transfer of domestic work to the realm of production and consumption (Basgen & Blunden, 1999/2005) is consistent with neo-liberal rationalities of individual responsibility (Laliberte Rudman, 2006) and cultural values of Western individualism. As discussed in Chapter 3, the discourse of responsibility concerns taking care of one's self within a market economy. This raises questions about differences between *need* and *want*. In the material act of purchasing home support services to meet personal *need*, the buyer is viewed as taking responsibility for her or himself (Else & St John, 1998; Kelsey, 1993; Laliberte Rudman, 2006; St John, 1993). However, Baudrillard (1988/2000) challenges the notion of *real* needs arguing that it is not possible to define needs, because needs are constantly being created (see also Gabriel & Lang, 1995; Lury, 1996). Thus, unlike Marx (1844/2000), who assumes that use-value fulfils normal or natural human need, Baudrillard argues that need is in fact socially constructed. He argues that sign-value leverages use-value by creating a sense of need. In this respect, retirement villages meet more than the basic need for shelter; they offer lifestyle shopping enabling older people to

achieve a “perfect” life and “successful anti-aging” through pleasing themselves (McHugh, 2003, p. 171) instead of others (Featherstone, 1991). This shows how commodification may be about sign-value in addition to use-value: The value is not only in *use*, but also in what it *represents*, and this in turn influences the value of exchange. As Featherstone (1991) summarises, “Consumption, then, must not be understood as the consumption of use-values, a material utility, but primarily as the consumption of signs” (p. 85) – a symbolic process.

In this respect, a modernist critical position can be informed by post-modernist understandings of the dimensions of consumption. Whereas a modernist position highlights rationality and order (W. Potter, 1996) and a critical position aims to rectify identified social injustices (Kincheloe & McLaren, 2005), postmodernism focuses on heterogeneity and a distrust of large-scale, universalising discourses. Post-modern understandings encourage nuanced approaches that dissolve rigid distinctions and engage with multiple possibilities (W. Potter, 1996). Therefore, with regard to consumption, post-modernist views take into account the conditioning of needs (Baudrillard, 1988/2000). When desire or want is (re-)presented as need, exchange- and use-values are united to constitute commodity “fetishism” (Marx 1867/2000, p. 11). It is through signified use-value, and the conditioning of desire as need that objects justify their production and acquisition. From a specifically communication-oriented perspective “the pervasive power of advertising has heightened the extent to which commodities of all types are fetishized and made to symbolize attributes that are craved” (Gottdiener, 2000, p. 4). In summary, want or desire becomes understood as need through symbolic sign-value and thus becomes a conduit for exchange-value.

In the light of the above, retirement villages may be viewed as designed to meet socially constructed needs that are promoted and perceived as related to age and retirement (Blaikie, 1999). This is *not* to say that all needs are socially constructed; material needs such as food, shelter,

clothing, and relationships are part of the human condition. However, while retirement villages *do* meet material needs, the issue is how these needs are framed and addressed at a societal level. Needs such as accommodation and support, once met within existing social worlds of family and neighbourhoods (Laws, 1996) are now framed as “retirement needs” which are articulated at a societal level and becoming embedded in individuals’ worlds. Retirement villages are part of the consumer landscape, accepted as a societal and business mechanism for identifying and/or creating needs, and developing services and products to meet them.

Retirement villages promote retirement needs in terms of “lifestyles” that can only be achieved in a retirement community (Laws, 1996; McHugh, 2000). These lifestyles may be read as signs of “positional consumption” (Gabriel & Lang, 1995; Lee, 2000; Lury, 1996; Schor & Holt, 2000; Veblen, 1925/2000), or indication of social status, in that retirement villages are visible forms of leisure and living available to those who can *be seen to* afford it. However, from an interpretive perspective, which privileges the individual’s interpretations and lived experiences (Cheney, 2000b; Denzin & Lincoln, 2005a; Patton, 2002; Schwandt, 2000), it is important to note that older people may not feel that retirement village living in any way communicates positional consumption (Mansvelt, 2005a). As Leonard (2002) found, some residents choose retirement village living so as not to burden family members with the responsibility of helping with needs of daily living.

In summary, retirement villages may be seen as sites of commodification where sign-value in-part colonises use-value through the creation of (new) retirement needs and various consumption of retirement lifestyles. However, retirement villages are also sites of different lived experiences and interpretations that need to be considered along with commodification processes.

Relationships between Consumption and Identity

As noted previously in Chapter 2 only a relatively small proportion of older people live in retirement communities, however, “the model of such communities has been most influential in the creation of an active, if shallowly commercial, image of the elderly” (Ekerdt, 1986, p. 242). Here Ekerdt raises two important issues: the relationships between consumption and identity; and the role of organisational communication in the realm of identity management of older people.

The concepts of identity and identification are inter-connected and multifaceted processes. Identity, while traditionally treated in the West as a solid, essential core of being, may be seen as a fluid and amorphous dimension of the human experiences concerned with expressions of individual self and group alignments, representation, and points of reference (Cheney, 1991; Cheney & Christensen, 2001). Identity, therefore, concerns both distinctiveness and sameness of individuals within social groups; distinctiveness, in terms of what is the “essence” of a person that sets them apart from others, and sameness in terms of what a person shares, or has in common with others (Cheney, 1991). By shifting to the concept of “identification”, we find a more processual, dynamic understanding of identity. In the process of identification, ironically, individuals can express uniqueness by aligning with others, including individuals, collectivities or social categories (Cheney, 1991, p. 13). Thus, to be *different* (individual identity) has to be tempered with being the *same* (identification with others) because “total otherness like total individuality is in danger of being unrecognizable” (Featherstone, 1991, p. 87) and therefore unlikely to be ratified by others.

Identity and identification are central to consumer society, not only in the obvious cases of branding, but also more generally in terms of how “packages” of products, services, and images are understood in terms of lifestyle and markers of individual and group identity. Various social groups consume cultural commodities which demarcate their social

circumstances, standard of living, and lifestyles (Featherstone, 1991; Gabriel & Lang, 1995; Lury, 1996). Therefore, identity is linked to positional consumption in the sense that the purchase and use of particular goods and services – including leisure products – indicate who we are (Featherstone, 1991; Gabriel & Lang, 1995; Lury, 1996; Veblen, 1925/2000). The “individual within consumer culture is made conscious that he [sic] speaks not only with his clothes, but his home, furnishings, decoration, car and other activities which are to be read and classified in terms of the presence and absence of taste” (Featherstone, 1991, p. 86). In this regard, retirement villages, through their promotion and presence, may be seen to represent a certain kind of older person (Laws, 1995; Mansvelt, 2005a) and thereby provide reference points for older people to assess successful ageing (or even anti-ageing) (McHugh, 2003) and what it is to be a responsible “ideal retiree” (Laliberte Rudman, 2006).

In short, individuals seek identity claims which are in turn ratified or legitimated by others, and consumption choices help to create and locate identities – particularly to the extent that meta-messages of advertising such as individuality, belonging, and status, are internalised. Even so, only those with the material resources (in addition to taste) can afford to buy positional lifestyle goods.

Consumption, Lifestyle, Leisure, and Work

The term “lifestyle” was first used in print in 1929 (Oxford English Dictionary). Although the term lifestyle was not in everyday use in the 1920s, ideas and activities currently associated with lifestyle began to emerge at that time (Ewen, 1976). Changes in production and consumption during the 1920s meant that “the worker [could] spend his [sic] wages and leisure time on the consumer market” (p. 29). In this regard, lifestyle brings together commodification, identity, and leisure.

In everyday terms “lifestyle” refers to the particular ways in which individuals choose to live their lives. However, it also indicates what those

choices represent in terms of identity claims (Featherstone, 1991; Gabriel & Lang, 1995; Lury, 1996). Lifestyle is therefore central to a consumer culture “based on credit, spending and enjoyment . . . which *judges people by their capacity for consumption, their ‘standard of living’, their lifestyle*” (Bourdieu, 1984, p. 310, emphasis added). Lifestyle becomes the conscious expression of self and style (Featherstone, 1991) and the possibility of multiple lifestyle choices lays the foundation for multiple, parallel and conflicting identity attributions, and claims (Featherstone, 1991; Gabriel & Lang, 1995; Lury, 1996). A retirement village entrepreneur, for example, “can simultaneously see an older person as a relatively affluent consumer or as someone ‘in need’ of some assistance device that can be marketed for a profit” (Laws, 1996, p. 174). Thus, in concert with the process of conditioning needs, lifestyle becomes “the end product, a marketing concept which twins designer-led with shifting patterns of consumer demand” (Mort, 1989/2000, p. 277). Designer-led retirement communities, for example, developed in part on the observation of *de facto* retirement communities (Marans et al., 1984; McHugh, 2003).

Leisure as a significant aspect of lifestyle has become a defining component of identity for many groups within society (Featherstone, 1991; Gabriel & Lang, 1995; Lury, 1996) including older people (Blaikie, 1999; Featherstone & Wernick, 1995). Historically leisure was seen as honourable because of its association with *noble* as opposed to *ignoble* work, and later through *consumption*, became evidence of wealth (Veblen, 1925/2000). Positional or conspicuous consumption, previously the domain of the privileged social groups is now an occupation for the general populace (Gabriel & Lang, 1995; Lee, 2000; Lury, 1996; Schor & Holt, 2000). Leisure as one form of conspicuous consumption, in the purchase of leisure goods, activities and the consumption of time (Slater, 1997/2000), has usurped the role of work in its identity-making functions. These ideas have several implications within the domain of retirement villages.

In 1950s society, identity in Western cultures was to be found in work and professions (Deetz, 1992; Featherstone, 1991) and key distinctions were identified between labour, work and leisure (Arendt, 1958). *Leisure* traditionally meant free time away from work, but more accurately refers to voluntary activity that is personally (intrinsically) rewarding to the actor and has no exchange-value. *Labour* alone, was defined as activity that creates things for others – just doing a job – and therefore had only exchange-value and no intrinsic value for the worker. *Work*, though, had value for workers as well as exchange-value and was therefore both intrinsically and extrinsically rewarding.

With an increasing emphasis on lifestyles, intrinsic and exchange-values in relation to work-leisure divisions have become increasingly blurred (Gabriel & Lang, 1995; Lee, 2000; Lury, 1996; Schor & Holt, 2000).

In current society, leisure may mean engaging in recreation, sport, entertainment, relaxation, holidays, travel, or socialising (Chaney, 1995); and spending money (Featherstone, 1991). Such activities illustrate a shift from leisure being intrinsically valued activities outside of work, to being associated with consumption. This parallels a shift from identity based on production to identity based on positional consumption where work becomes largely a vehicle for consumption. Thus, whereas once identity was based on the service provided or the product produced it has moved to the position held in the workplace (Deetz, 1992), and therefore, what this represents in terms of the capacity to consume. In this respect, leisure and work now possess sign-values as well as combinations of intrinsic and exchange values.

Retirement villages may also be seen to demonstrate blurred boundaries between leisure and work. In promoting “active lifestyle” they substitute unpaid busy-ness for paid work (see Ekerdt, 1986). Infused with discourses of active and positive ageing, retirement village residents’ identity claims as “active retirees” are constituted in leisured busy-ness. Such identity statements may therefore imply that non-residents are

something less than active retirees. This is one example of how leisure-lifestyle becomes cultural currency which communicates identity claims through consumption (Featherstone, 1991; Gabriel & Lang, 1995; Lee, 2000; Lury 1996; Schor & Holt, 2000).

Retirement villages may be viewed as an example of “forms of leisure consumption in which the emphasis is placed upon the consumption of experiences and pleasure” (Featherstone, 1991, p. 96). That is, in addition to being places to live, retirement villages may be defined as locations of leisure consumption (Mansvelt, 2005a) similar to theme parks, tourist and recreational centres, themed restaurants, and cruise ships that have emerged in consumer society (Featherstone, 1991; Gottdiener, 2000; Ritzer, 2005). In this view, retirement villages are an example of the expanding leisure markets within consumer society (Laws, 1996). Such developments of new markets are the result of the joint processes of commodification and marketisation. Marketisation is the focus of the next section.

Marketisation: Three Dimensions

This section explores marketisation in three different ways and discusses the implications of marketisation for customer participation particularly in the context of retirement villages.

Marketisation may be viewed as a *framework* of market-oriented principles, values, practices, and vocabularies; a *process* of penetration of essentially market-type relationships into arenas not previously deemed part of the market; and a *universal discourse* that permeates everyday discourses but goes largely unquestioned (compare Cheney, 1999; du Gay, 1996; Fairclough, 1992, 1993; Strasser, 2003). In brief, as a *universal discourse* current Western society largely assumes that rules of the market are the default setting (Agnew, 2003). The market model, while relying on commodification of increasingly segmented aspects of life for its development, is itself a *framework* of principles, values, and practices. The

spread of the market model helps bring new commodities and markets into being (Fairclough, 1992). In this way, marketisation is also about the *penetration* of essentially market-type relationships into arenas not previously part of the market (Fairclough, 1992; Salamon, 1993; Strasser, 2003). Thus, the market becomes *the* model of practice for organisations (Cheney, 1999) and society generally (Strasser, 2003).

The Market: A Communication Lens

“The market” is often defined within generally understood economic frameworks (Aune, 2001), but is equally a *communication* concept. Both definitions are necessary for the purpose of this thesis. Historically, markets were places where people bought and sold produce, crafts, and services. The bargaining and bartering took place in a given location (the market) in the village or town, within the presence of other traders (who probably knew each other in some way or another) (Basgen & Blunden, 1999/2005). Within an economic paradigm in the 21st century, the market now encapsulates a range of meanings including market “forces” that affect production and selling of goods and services, as well as the actual exchange, (i.e., buying and selling) of goods and services themselves. These forces are constituted in communication – in interactions between information, interpretations, and actions of people. Market advocates often waiver between calling it an unmitigated good and a value-neutral force (Aune, 2001; Cheney, 1999).

A communication perspective moves the concept of the market from one of economic exchange, to a network of relationships and interactions, ideology and advocacy (Cheney, 1999; Fairclough, 1995; White, 1981). For, “as Weber quite rightly knew, people behave according to symbolic as well as economic needs” (Gottdiener, 2000, p. 5). One communicative description of a market is “a network of people, or more accurately today, as a network of organizations” (Cheney, 1999, p. 6). Another is that “[m]arkets are self-producing social structures among

specific cliques of firms and other actors who evolve roles from observations of each other's behavior" (White, 1981, p. 518). The first description captures the humanity within the notion of the market: that fact that markets are people and not some invisible force "out there". Also, and importantly for this thesis, this description points to the role of *organisations* in the market. The second description alerts us to the *relationships* between organisations within a given market or "competitive field" in which organisations operate (Karpik, 1978, p. 49). It also highlights the activities of organisations in the same markets – that they *watch* each other as much as they may watch customers, and in so doing, *change*.

Within New Zealand, retirement villages have emerged from within the aged-care sector as a new competitive field. A new clique of firms has developed as new organisations have entered the market with large scale (for New Zealand) developments, across multiple locations. Some of these organisations have bought existing businesses to expand on, while others have developed green-field sites (Gibson, 2005; Read, 2004; Springall, 2004). These developments may have influenced the products and services of existing organisations to the extent that some small-scale operators and religious and welfare groups are withdrawing from villages and from aged-care (Gibson, 2006; Thompson, 2003). These existing operators observed the new market entrants and subsequently opted out of the competitive field. Thus, the actions and reactions of different organisations within a given market may be seen to influence the development of that market. In this light, the market is more than a simple economic system; it is a system of symbolic and therefore communicative activities.

Marketisation as a Multidimensional Theoretical Concept

The market is not a monolithic or grand model but has evolved to become the dominant form of managing the distribution of goods and

services in Western society (Agnew, 2003; Strasser, 2003). As a *multidimensional concept*, marketisation is a model with a set of value commitments, prescribed practices, and ways of talking about the problems and projects of society. The core principles of the neo-liberal approach to market society include allegiance to free trade, a greatly reduced role for central governments in providing social services, and the privatisation of services (Aune, 2001). Accompanying these political and economic commitments are broad social discourses centred on the terms “free trade”, “competition”, “entrepreneurship”, and “customer/consumer orientation” (see, especially du Gay and Salaman, 1992). Within organisations, *specific practices* manifest these discourses (Fairclough, 1992) in self and product/service promotion, sales activities, researching customer satisfaction and scanning the market environment (e.g., du Gay, 1996).

I now discuss features of four interconnected value discourses of the market concept relevant to this research. These are choice; customer satisfaction orientation; competition; and entrepreneurship.

Choice.

Choice is fundamental to the market model with *rational* choice involving economic factors being dominant (Aune, 2001). Rational choice assumes that consumers make good purchases using a quality-price ratio. However, people buy products for reasons other than quality-price on ratios and often using other “rationalities” (Aune, 2001; Cheney, Christensen, Zorn, & Ganesh, 2004; Gottdiener, 2000).

Rationality when applied to communication is reduced to a transactional process involving the exchange of information (Aune, 2000). Aune argues, however, that attitudes and behaviour change cannot be accounted for by the rational model. Decisions to buy one product over another may not be a simple matter of responding to information in the market-place. Weick’s (1995) sensemaking model demonstrates how sensemaking is constructed in different ways, of which a key part is

retrospective sensemaking. With respect to making purchases, buyers may consider the benefits of the item in ways not thought of *prior* to the transaction and therefore beyond rational thinking. In the case of retirement villages, where customers remain with the RVO, post-purchase organisational communication with residents may be just as important as traditional promotional, pre-purchase communication.

Competition.

The principle of competition between organisations producing similar products and services is seen as providing choices for customers. Where such choices exist, competition is viewed as a means to improve product or service quality. The central point to be made here is that organisations themselves influence the extent to which competition operates within a given competitive field.

The value of competition requires organisations to be able to sustain demand by remaining adaptable and responsive in the market place. One way to be responsive is to be proactive and continually scan the market environment for information about consumer needs and wants (Christensen, 1997; Christensen & Cheney 2000; du Gay, 1996). However, the selection of information sources, the data gathered, and the organisation's reception and response to these depend largely on the organisational members' *beliefs* about the environment as well as their *modes of interpretation* (Daft & Weick, 1984). In addition, these modes of data gathering and interpretation are influenced by individual and organisational perspectives, goals, and culture (Christensen, 1997; Christensen & Cheney 2000; Hatch & Schultz, 1997). Thus, market analysis "is often circumscribed by strategic perspective" (Christensen, 1997, p. 21). An aged-care organisation, for instance, which offers hospital care and relies on routine information systems developed at an earlier time in the organisation's history (Daft & Weick, 1984) is likely to analyse the "retirement village market" with health care in the foreground. This conditioned view means that other possibilities for product or service

development will go unrecognised. Although there is two-way communication between organisations and environments, organisational factors influence the *approach* to market analysis, and subsequently the *results* of market analysis. Competition is therefore often contained within known organisational capacities and a known competitive field.

Another way for an organisation to be competitive is to *create* a market. Using the construction of a “Grey Gold” market, Christensen (1997) argues that organisations do not simply *adapt* to, but help to *create* environmental factors. He writes that this market was imagined as “a critical demanding consumer, willing and able to pay more for quality and service after retirement” (p. 22). Subsequently organisations developed products and services to cater for this “collective image” (p. 22). Christensen called this a self-fulfilling prophecy. Similarly in New Zealand in recent years, the ageing population has been used in discussions on future employment trends (Ansley, 2004; Jayne, 2003; Oliver, 2003) and the prospects for the New Zealand retirement village sector (Read, 2004; Springall, 2004). These examples illustrate that organisations not only *seek* information from markets, they also *tell* markets (i.e., people) what they need or want.

While the notion of competition is actively promoted within the market model, many large organisations also try to minimise or even avoid competition through expansion, establishing strategic alliances and creating cartels (Cheney, 1998, 1999; Dyer, 1982). The last 10 years in the New Zealand retirement village sector has seen such developments. RVOs have expanded their operations (e.g., Metlifecare, Ryman Healthcare, Summerset, Vision Senior Living), some have sold their interests in villages to various investors (Daniels, 2005; Gibson, 2005, 2006; Hunter, 2005; Steeman, 2006; Weir, 2005), and still other RVOs have formed strategic partnerships including private equity fund organisations (Bridgeman, 2006; Hunter, 2006) and government (Gibson, 2003).

Finally, competition can be redefined within a given competitive field so as to enable co-operation between different organisations. The establishment of the Retirement Villages Association in New Zealand may be seen as one form of co-operation between competing RVOs because its functions include advocating for members and promoting retirement village living generally (Retirement Villages Association, n. d.). Through this forum, RVOs can represent themselves as a “sector” and other forms of lifestyle housing as “the competition”. Such cooperation benefits the retirement village sector generally and RVOs individually, because competition is minimised between similar RVO products, and emphasised between RVO products and alternatives that also offer “lifestyle choice”.

Customer orientation.

Another central value of the market concept is customer satisfaction. The assumption is that focusing on customer needs and satisfaction will improve product or service quality and therefore more people will buy them (Christensen, 1995; du Gay, 1996). A customer focus strategy is managed through integrated marketing communication which concerns activities related to the development and sale of products and services, market research, monitoring consumer behaviour, undertaking customer satisfaction surveys, advertising, sales promotion, and public relations (Christensen, 1995). In this way, a customer focus becomes the core driver for the organisation and *monitoring* customer satisfaction becomes a benchmark for success in the market (du Gay, 1996).

In addition to being a business strategy, customer satisfaction has become a contemporary expression of democratic *ethos*. The mobilisation of the consumer began in the 1960s with social movements and it is now the default position of organisations to focus on the customer (e.g., Christensen, 1995; du Gay & Salaman, 1992). Moreover, this ethos is evident in recent consumer resistance to organisational practices such as the campaign against *Nike* (e.g., Knight & Greenberg, 2002). However, in the context of this thesis, the extent to which customers actually influence

organisational practices and decisions within the New Zealand retirement village sector is open to investigation.

In comparing these two positions on customer focus, it appears that in general organisations actively *seek* customer feedback to improve their place in the market. However, it also seems that difficulties may arise where customers *volunteer* feedback which is contrary to an organisation's "preferred reading" of its own practices.

Entrepreneurship.

Entrepreneurship is at the base of market and consequently marketing endeavours, and "enterprise culture" can be seen at work with both customers and organisations (du Gay, 1996; du Gay & Salaman, 1992). Integral to entrepreneurship is the language of "enterprise" and the discourse of "excellence" both of which characterise workplace relationships, organisational goals, and construction of consumers (du Gay, 1996).

Entrepreneurship has recast customers as "empowered human being[s]...as autonomous, self-regulating and self actualising individual actors, seeking to maximise the worth of their existence to themselves through personalized acts of choice in a world of good and services" (du Gay & Salaman, 1992, p. 623). This apparent transference of power from organisation to individual is seductive and oppressive in its logic. It is seductive because consumers may begin to believe in their own purchasing power, and oppressive, because organisations are continually using the "wants of the customer" to drive their business and their staff (du Gay, 1996). It is also oppressive in that it reduces consumer power to the act of consumption which becomes the only political act which the market takes seriously.

The discourse of excellence inherent in an enterprise culture, exhorts organisational members to enhance productivity, satisfy customer needs, aim for quality in service delivery or products, be flexible and innovative (du Gay, 1996). This discourse of excellence directly links

individual and organisational goals, and also aligns with “value logics” such as adaptation, innovation, and productivity (Karpik, 1978). The “enterprising subject” whether organisational or individual “calculates about itself and works upon itself in order to better itself” (du Gay, 1996, p. 124). Trethewey’s (2001) study of mid-life women in the workforce found entrepreneurialism evident in texts that claimed “women can stave off decline if they take control of the own aging process” (p. 187). Similarly, retirement village advertisements suggest that purchasing retirement village residency improves the chances of slowing the “inevitable decline” of old age (Mansvelt, 2001, p. 331).

Entrepreneurial organisations and their members continually improve themselves (e.g., systems and skills) by focusing on customer satisfaction, monitoring the competition and their profiles among opinion leaders (other organisations and individuals), and keeping up with new forms of consumption to achieve improvement.

In summary, the key themes across these four value discourses are “choice”, “competition”, “customer focus”, and “continuous improvement” of product, organisation and self. These clearly have implications for RVO communication in the recruiting of new residents. However, there are also implications for organisational communication with existing residents because of their ongoing relationship with the RVO.

Entrepreneurship, a key aspect of customer focus, “derives from and properly belongs to a particular sphere of existence (the life order of the market)” life (du Gay, 1996, p. 186) but is increasingly becoming evident in other parts of life (Cheney 1999; du Gay, 1996; Fairclough, 1993). This brings me to marketisation as a process of colonisation.

Marketisation as a Process of Colonisation or Penetration

Marketisation has been described as “the extension of market models to new spheres” (Fairclough, 1992, p. 99) and “the general

reconstruction of social life on a market basis" (Fairclough, 1993, p. 141). The processes of penetration of previously independent domains by market-centred discourse is achieved in a number of ways, but especially through the discursive and practical colonisation of one domain of activity by another (compare Cheney, 1999; Deetz, 1992; du Gay, 1996; Fairclough, 1992, 1993). Thus, we find increasingly that politics, health, and education (Fairclough, 1992, 1993) have adopted the language of business, including heightened emphasis on efficiency, the customer, markets, and even profit. What this means in practice is not only an orientation toward pleasing the customer by satisfying even momentary whims but also a persistent (self-) promotional posture (see Fairclough, 1992, 1993).

Within the residential aged-care sector, the domain or focus of this study, marketisation is evident in two specific trends. The first is the segmentation of what was aged-care into different products and services aimed at different consumer groups. Gone are the "patients" and "inmates" of hospitals and rest homes to be replaced with "independent and active clients", "dependent and frail residents", "home-support customers", and "life-style consumers". The second trend is the infiltration of for-profit organisations in social services (Lunt, Mannion, & Smith, 1996; W. Ryan, 1999; Salamon, 1993). In New Zealand this influence has been matched by the gradual withdrawal of some religious and welfare and charitable trusts from the aged-care sector specifically (Gibson, 2005, 2006; Taylor, 2005; Thompson, 2003). This latter trend is a case of colonisation of a "social service" order of discourse by market discourse.

Fairclough (1993) describes an order of discourse as the "totality of discursive practices of an institution and the relationships between them" (p. 138). He uses the example of education to demonstrate how the totality of discursive practices within the education order of discourse is different from that of market discourse. Colonisation of education by the market results in radical change. New language is used for existing relationships and activities; students become customers and courses become packages

and products; new practices such as advertising are adopted for recruiting staff and promoting the purchase of courses. Fairclough argues that such marketisation undermines the social contract between education and society, educators and society, and students and society. A similar case can be made against the commodification of health care. Where healthcare is commodified, the social responsibilities that go with medical knowledge are lost; healthcare becomes a commodity for purchase by those who can afford it, rather than available to those in need (Pellegrino, 1999).

In this vein, care of the aged was once a charitable service. However, there has been a shift from aged-care as charitable work with intrinsic social value, to a social service industry focused on retirement and leisure with a market driven ethos (Blaikie 1999; Laws, 1995, 1996; McHugh, 2000, 2003). From the late-19th to the mid-20th centuries, aged care in New Zealand was dominated by churches and charities (Saville-Smith, 1993) and beliefs about the intrinsic and societal value of such work (Humberstone, 1984). Aged-care and more so, retirement villages are now part of a consumer model: older people are the new consumer in youth dominated Western culture (Balazs, 1995; Blaikie, 1999; Featherstone, 1991; Featherstone & Wernick, 1995). The growth of for-profit organisations in aged-care services and retirement villages (Davey et al., 2004; Thorns, 1993) has brought with it the language of the market. Customers, service-packages, product offers, and profitability are now features of retirement villages (Blaikie 1999; Laws, 1995, 1996; McHugh, 2000, 2003).

So far, this perspective shows how *from the outside*, the development of the retirement village sector may be considered as an example of the marketisation of an order of discourse. However, the extent to which marketisation has penetrated the sector in every-day practices is open. In this light, it is useful to note Cheney's (1999, 2004, 2006) three possibilities for identifying the extent and level of change.

The first possibility is "washing over" or "floating above" where change, or in this context marketisation, is somewhat superficial. Here,

language in formal organisational communication may reflect market discourses but the organisational members and everyday organisational culture remain unaffected. For example, an information sheet for residents of a residential care facility may state that the facility “offers customers lifestyle choice”. Yet there may be no change in the actions of staff towards residents as “customers” or in fact any change in residents in their new role. The second possibility is “cooptation” or “cafeteria” approach where organisations adopt new market or economic discourses, but *adapt* them to suit local conditions and practices. For example customer satisfaction surveys may be undertaken in more informal ways, in small-town businesses where everyone knows everyone else. Finally, the third possibility is “transformation” where market discourses are taken on by managers, workers, and consumers to the extent where fundamental changes occur in worldviews and social practices. During the “New Zealand Experiment” (Kelsey, 1993, 1995) parts of the healthcare sector were transformed into “divisions” with a focus on “customer service”, where patients became “clients”, and departments became “business units”.

In summary, the penetration of market-oriented values, language, and practices into previously independent domains and organisations, helps to re-orient relationships between service providers and service users. This re-orientation and the extent to which marketisation has penetrated every-day practices in new domains is open to investigation.

Marketisation as a Universalising Discourse

Marketisation is in fact a broadly influential discourse that is often disconnected from its origins. Market supporters often cite Adam Smith (1776/2000) to defend neo-liberal, free-trade, pro-market policies when in fact Smith’s vision of capitalism favoured a role for government, and the tempering effects of social bonds and accompanying emotions such as compassion and empathy (see Werhane, 1991). In fact, the symbol of the

market is especially powerful today in the ways its ambiguities are exploited (Kuttner, 1997). In this regard, many pro-market tracts have been compared to theological discourse in terms of their grand claims and comparative lack of empirical evidence (Cox, 1999).

It is important to note that just because someone or something *references* the market does not mean it becomes like the market; and that the ambiguities surrounding the market allow for a lot of conceptual and practical “slippage” by market advocates. For example, values such as customer satisfaction, productivity, profit-making, and entrepreneurship are aspirations of many Western organisations (Cheney, 1999; Christensen, 1995; du Gay, 1996) which now includes not-for-profit organisations (Lunt, et al., 1996; W. Ryan, 1999).

Marketisation and Participation in Consumer Society

Marketisation raises the issue of participation in consumer society generally, and for this study, the retirement village sector in particular. It is widely accepted in a capitalist context that the greater one’s financial resources the greater one’s capacity to participate in consumer society (Gabriel & Lang, 1995; Lee, 2000; Lury, 1996; Schor & Holt, 2000). With regard to the retirement village market, only older people with sufficient financial resources can choose to buy into retirement villages.

As outlined above, marketisation also implies *choice* within the consumer’s capacity to participate. Choice is a central feature of access to and use of products and services in the retirement village market place (Laws, 1995). Therefore, it may be said that retirement village services are *more* personal than the medicalised models of institutional aged-care. This appears to be the case at an individual level, where residents can choose the dwelling they will buy, and the facilities and services they will use. However, retirement village organisations seem to offer similar lifestyles in similar recreational environments (Laws, 1995, 1996; Lucas, 2002; McHugh 2000, 2003) with a particular image of older person in mind.

Laws and McHugh both argue that retirement villages are defined *as much by the groups of older people they do not cater for as by the groups they do cater for*. Retirement village organisations target particular groups of older people and – although not formally stated – often cater for people of like-ethnic and socio-economic groups (Laws, 1996; McHugh, 2000). Therefore, choice is only available to those who fit the implied as well as stated entrance criteria.

Even though choices at a broad, societal level may be more nominal than actual (Laws, 1995) participation within the retirement village is worthy of investigation. Residents' capacities to choose their level and *extent* of participation, and their degree of *influence* in the retirement village as *places to live* and as *organisations* are important issues to explore. These are areas which have so far been absent from studies of retirement villages.

In view of this distinction it seems possible and beneficial to locate this study within the field of organisational communication which can offer new dimensions to the ongoing study of retirement villages. This approach is the focus of the next section.

Organisational Communication

As a discipline, only a few organisational communication scholars (e.g., Trethewey, 2001) have investigated the age construct at work or treated retirement as anything more than an "age-neutral event of planned organisational exit or disengagement" (Bergstrom & Holmes, 2004, p. 305-306). It is therefore hardly surprising that residents' relationships with RVOs have been largely framed within consumption without reference to *organisational* communication. Bergstrom and Holmes argue that "[o]lder workers will have tremendous impact on organizations through the next few decades" (2004, p. 324). Although referring largely to older people as workers in organisations, their claim could easily apply to customer and more generally, stakeholder roles. As members of retirement villages,

residents are *stakeholders* in the RVO. From this view it seems important to examine how retirement village residents as *organisational members* impact on retirement villages as *organisations*.

This part of the chapter aims to show the value of examining retirement villages from the standpoint of organisational communication. In order to discuss key aspects of organisational communication with reference to RVOs and residents' roles within them, I begin by outlining the rise of formal organisations or corporations and their influence within Western society.

Emergence and Influence of Formal Organisations

Corporations are a particular kind of social organising. Referred to by a range of different terms including "corporate actors" (Coleman, 1974, 1975) and "formal organisations" (Kieser, 1989), "corporations" can mean any group or collectivity. This includes those organisations that operate within the specific legal sense of "corporation" (Cheney, 1991) or "incorporated society" (i.e., not-for-profit organisations). Formal corporations are a fairly recent phenomenon in Western society (Cheney, 1991; Coleman, 1974; Kieser, 1989). For centuries in Europe, organising structures for the distribution of good and services corporations relied on kinship ties and social orders such as craft guilds (Coleman, 1974; Kieser, 1989). In concert with population growth, increased goods, the development of markets, and changes in production and property rights, functionally specialised formal organisations began to emerge (Kieser, 1989).

The critical starting points for the emergence of corporations seem to have been the reconceptualisations of the church and kingship in the middle ages (Coleman, 1974; Kieser, 1989). At this time the ownership of churches built by landowners for local use came into dispute as priests began to argue that the landowners did not have full rights to the land

surrounding the churches. It therefore became common practice for the saint for whom the church was named to be the owner. In this respect,

the saint was performing no crucial function other than having his name used, serving as the person who owned, bought, and sold property. Slowly the practice grew in law of naming the church itself as owner. By the thirteenth century in England not only had this practice developed, but also a theory about the *kind* of person the church was. For example, the church was regarded as an infant, to be protected by law against the guardian's negligence. A *juristic* person had evolved . . . (Coleman, 1974, p. 17, original emphasis)

A similar theory also developed concerning the position of the king. It was established that the king had a physical body and a body politic and this led to the "explicit separation of 'The Crown' from the particular king" (Kieser, 1989, p. 541). The social consequences of the reconceptualisation of church ownership and the king were important, for they resulted in the creation of "entities that transcend natural persons in time, space, and resources" (Cheney, 1991, p. 4): that is, corporate or formal organisations.

Although corporations transcend natural persons, they generate wealth primarily from the input of natural persons (Cheney, 1991; Coleman, 1975; Deetz, 1992; Estes, 1996; Kieser, 1989). In today's corporation, Deetz writes, "the employee is first a resource" (Deetz, 1992, p. 15) although similar observations can be made of other organisational stakeholders such as financial investors. Thus, in addition to issues of ownership, the split between the individual and the body politic had implications for *relationships* between natural persons as resource providers and their employing corporations as well as the actual work *roles* natural persons fulfil within organisations.

The contractual relationship between the organisation and its members (see Barnard, 1938/1968) has changed as formal organisations have developed. As mentioned above, identity once came from the product produced. Historically, membership of organisations was based

on ability to produce certain goods. In this respect craft guilds were exclusive social orders with highly ritualised and strict entry procedures, and once accepted membership was for life (Kieser, 1989). On the other hand formal organisations rely on flexible arrangements where members have choices. Individuals accept payment from organisations in return for adopting organisational goals, and can choose to remain in employment or leave and thereby withdraw their resources (Kieser, 1989).

The degree of *actual* choice available to employees is contested (Deetz, 1992), however, the *idea* of choice is significant because a private sphere evolved alongside the work sphere, where “different needs of individuals could increasingly be fulfilled in different functionally differentiated social systems” (Kieser, 1989, p. 547). That is, this new contract with the modern formal organisation allowed the corporate employee to have a working life and “another life, divided among spouse, children, friends, community, and religious and other nonoccupational involvements” (Bellah, Madsen, Sullivan, Swidler, & Tipton, 1985, p. 45). In this way, the “organizational revolution” (Boulding, 1968) may be seen to refer, not only to the proliferation of formal organisations in 20th century Western society, but also to the development of new relationships between individual and organisation.

Also changed was the nature of the employee role. As management became separated from ownership within corporations, the role of manager became separated from the person enacting it. Individual management employees began to hold “positional rather than personal interests” (Deetz, 1992, p. 224) and their key tasks were to manage available resources to achieve goals set by those who controlled and/owned the organisation (Bellah et al., 1985). In this way, unlike earlier forms of organisation where personal motives and organisational goals were virtually synonymous, in the corporate organisation they were separated (Deetz, 1992; Galbraith, 1978; Kieser, 1989).

Another change concerned the roles of organisation themselves. In 19th century America formal organisations (aside from the government) “were largely confined to the churches, a few local philanthropic societies, and the political parties” (Boulding, 1968, p. 3). By the mid-20th century, however, there were not only

many more organizations, and many more kinds of organizations than a century previous but the organizations themselves [were] larger, better organized, more closely knit, more efficient in the arts of attracting members and funds and in pursuing their multitudinous ends. (Boulding, 1968, p. 4)

Similar observations could be made of 21st century organisations compared with those of the mid-20th century. Products and services traditionally provided on the basis of their intrinsic or societal value have become marketised commodities produced by organisations (see above discussion on commodification). The development of formal organisations has been held responsible for major changes in business, and more generally in working and private lives and thus influence and socialise individuals to accept as “normal” the role of organisations in all aspects of life (Deetz, 1992; Estes, 1996).

In summary, four significant features are identified with the emergence of formal organisations: (a) the creation of the juristic, legal, corporate person that (b) depends on the input of natural persons; (c) a division between ownership and management roles; and (d) an emerging division between organisational and private spheres of organisational members.

The rise of retirement villages in New Zealand as alternative places to live (Grant, 2006) illustrates the features discussed above. RVOs are firstly as their name suggests, organisations. That is, they are formal structures with designated legal status to act as corporate entities (Coleman, 1975; Keiser, 1989). In this respect, they are owned by individuals, or possibly other corporations and depend on the input of

natural persons – employees and investors – to remain viable. However, in RVOs, private and organisational life for residents becomes blurred. While employees go home at the end of the day, residents *live* there. Thus, residents are stakeholders of RVOs as both *purchasers* (customers) and *producers* (dwellers) of the retirement village product. RVO employees also have a stake in the production of the village.

As places of residence, retirement villages may be described as “neighbourhoods” in that a retirement village is a “limited territory within a larger urban area where people inhabit dwellings and interact socially” (Hallman, cited by Chaskin, 1997, p. 523). In this respect one could be tempted to say RVOs “sell” neighbourhoods. Following Wellman (1979), Chaskin (1997) identifies neighbourhoods as “viable units of identity and action” (p. 524) that create expectations about intensity of involvement, relationships and identity. He goes on to point out that the *idea* of neighbourhood is “rarely free of the connotations of connection that inhere in the term *community*” (p. 523, emphasis added). However, while it is possible to describe a retirement village as a “neighbourhood” or even “community”, both of these are traditionally viewed as phenomena of *natural persons* rather than *corporate entities*. The natural persons in the RVO include both residents and employees. Therefore, it seems possible to consider the impact of the organisation, employees, and residents’ involvement on the development and maintenance of the retirement village neighbourhood or community product.

In the light of the above, research on retirement villages is open to examination at the organisation-community intersection. Moreover, exploring how different stakeholder groups (residents and employees) engage with the retirement village as both organisation and as neighbourhood community is also possible. The conceptual dimensions of community are explored more fully in Chapter 7, but for now community is viewed from a communication perspective as a *field of interaction* (Warren, 1978; Wilkinson, 1991). A field of interaction is understood to be

“the simple aggregate of the clustered interaction of people and organizations occupying a restricted geographic area” (Warren, 1978, p. 409). The term “organizations” may refer to small, two-person organisations as well as to larger, formal organisations. From this point of view, retirement villages may be defined as (a) formal organisations that create, develop, and operate, (b) collections of dwellings (neighbourhoods) (c) and fields of interaction (d) within restricted geographical areas, and (e) that may be attributed with features and values associated with notions of community.

The interconnectedness between the RVOs, their products, and the role of residents suggests that it would be useful to locate research within the field of organisational communication, where *organisation* is constituted in *communication*. That is, it has been argued that “communication and organization should be conceived as synonyms” (Tompkins, 1984, p. 660) where communication is seen “as organization” and “not just occurring within” organisations (Taylor et al., 2001, p. 100, original emphasis). In the light of this, retirement villages as community and organisation can be viewed as constituted in communication. The following section outlines key principles of an organisational approach and relates them to this current study.

Developing Trends in the Field of Organisational Communication

Organisational communication as a field of study has its origins in industrial psychology, management theory, and communication skills training of the early-mid 20th century (Redding, 1985; Taylor et al., 2001). A “business and industrial” focus developed in the 1940s and 1950s (Redding, 1985; Tompkins, 1984), with the label “organisational communication” coming into general use in the 1960s (Redding & Tompkins, 1988). Generally speaking “the dominant impulse behind the study of organisational communication has always been pragmatic – attempting to discover how individuals or organisations, or both, can be

made to function more effectively” (Redding & Tompkins, 1988, p. 11). However, Cheney (1999) notes “one of the basic reasons we do business in the first place [is] to improve the human condition” (p. 5). Thus organisational effectiveness may be measured in terms of broad social aspirations as well as specific organisational goals.

Challenging the status-quo of organisational communication research has been instrumental in its continued development. For instance, in the late 1970s and 1980s several works appeared that helped to develop the field (Putnam & Pacanowsky, 1983; Redding & Tompkins, 1988; Tompkins, 1984). Aspects of organisational communication noted in later literature connect with these earlier issues. Mumby and Stohl’s (1996) “rather loose set of central problematics” (p. 53) connected with several characteristics of organisational communication scholarship identified by Tompkins (1984). Tompkins, and Mumby and Stohl, discuss specific characteristics of organisational communication which are outlined below.

“The container and thing contained”

Burke (1945/1969) first distinguished the “container” – the scene – from the “thing contained” – the act. With regard to organisations, Tompkins (1984) observed that organisational communication tended to focus on what happened *inside* the container – the act –, whereas in his view, communication should constitute “the *container* as well as that which is *contained*” (p. 662, original emphasis). Yet it is easy to think of organisations as “things” that contain systems of communication (Cheney, Christensen, Zorn, et al., 2004). Formal organisations are named institutions and use logos and other symbols to distinguish themselves from other organisations. They have identified and stated goals (e.g., to stay in business, grow business); established organisational structures and communication and work processes (e.g., hierarchical or flat; formal and informal); offer or produce (often specialised) products or services; and employ people (Cheney, Christensen, Zorn et al., 2004).

In the context of retirement villages, the village can easily be seen as a contained entity, within a named (and contained) RVO. However, as Tompkins notes organisations are also “systems of interacting individuals” (1984, p. 660), connected with other systems of interacting individuals. Mumby and Stohl (1996) argued that one strong point of organisational communication scholarship is that it questions what *counts as* organisation, the *boundaries* of organisation, and the *process* of organising. Thus, contemporary organisation communication scholars no longer focus on *only* what happens *inside* the container (Jablin & Putnam, 2001).

Rational and rationalities.

A second issue identified by Tompkins (1984) concerned the tendency of organisational communication to be dominated by a “rational” model which explained patterns, structures, and strategies of the organisation. Tompkins’ major critique was that organisational communication seemed to presuppose that “communication occurs in stable controlling entities” (p. 660). Furthermore, he suggests that focusing on *interaction* “would identify features and concepts as grounded in *practices* – the *actions* – of the organizational members” (p. 660, emphasis added).

Mumby and Stohl (1996) similarly argued that organisational communication scholarship is committed to questioning assumptions about rationality that focuses on prediction and control, and instead, asked us to consider other rationalities that include *interpretations* of the lived experienced of those connected with organisations. These viewpoints align with the interpretive turn in communication studies which sought to understand shared experiences and norms through focusing on language and interaction (Taylor, et al., 2001).

The “rational” models of organisations no longer dominate the organisational communication landscape. Rather, they are part of a range of rationalities which now include practices and activities of everyday

organisational life, as well as interactions between organisational members.

Direct power and influence.

A third critique from Tompkins (1984) involved the (re) conceptualisation of power. Tompkins wrote that within organisations power had traditionally been conceived of as “the ability of different participants to control the course of events and action of others” (Day, cited in Tompkins, 1984, p. 660). However, he argued that an organisational communication perspective should reframe power within the context of “systems of *influence*” (Tompkins, 1984, p. 661, original emphasis). Within this framework, power is operationalised in broader organisational contexts such as in the determining of organisational goals, the enactment of information processes, and the overall persuasive communication environment. He argued that organisational communication should “give equal or perhaps superordinate weight to systems of *influence*” (Tompkins, 1984, p. 661, original emphasis).

This approach to power means organisational communication researchers are better able to explore “suasory” communication especially in relation to organisational identity and stakeholder identification (Burke, 1937/1984; Cheney 1991; Galbraith, 1978) in that identification can be enacted in daily work activities. The extent to which an employee identifies with the organisation’s goals and values will be reflected in the extent to which he or she privileges these in on-the-job decision-making (Simon, 1976; Cheney & Tompkins, 1987; Tompkins & Cheney, 1983). Stakeholder identification with organisational goals and values enables power to be exercised unobtrusively, indirectly, without coercion, and even in “concert” with organisational members (Tompkins & Cheney, 1985).

Within the context of RVOs systems of influence would operate in both organisational and community domains. One question may concern

the capacity of the RVO to influence residents' activities; another equally interesting question may concern residents' capacity to influence the RVO.

Managerial bias and multiple voices.

A fourth critique from Tompkins (1984) concerned the managerial bias inherent in organisational communication research (also see Putnam, 1983; Putnam & Pacanowsky, 1983; Redding, 1979). This raises the issue of voice and "who gets to speak" (Mumby & Stohl, 1997, p. 55) in the research. In the New Zealand and Australian setting, as internationally, there is a trend away from a managerial orientation towards "research that is oriented towards the goals and interests of other, particularly marginalised stakeholders in organisations" (Simpson & Zorn, 2004, p. 22). Such voices can include those "heard as 'data'" as well as those whom to whom the research is directed and whom the researcher "attempts to engage in conversation", say, through the focus of recommendations (Simpson & Zorn, 2004, p. 22). From this position then, organisational communication research focusing on RVOs would include residents, and a range of employees including those in management. It may also involve people who are potential residents or who have some other stake in the RVO—for example, investors, friends and family of residents.

Bounded entity and blurred boundaries.

A fifth observation from Tompkins (1984) refers to levels of organisational communication: That is, he expressed concerns about how historically "organisation" has been treated as an entity "with distinct boundaries marking it off from its environment" (p. 661). More recently this has been articulated as the "organisation-society relationship" (Mumby & Stohl, 1997, p. 65) and "blurred boundaries" between the formerly accepted distinctions of internal and external organisational communication, (Cheney & Christensen, 2001). The current view of the organisation accounts for the organisation's relationship with other organisations and the environment more broadly, for instance:

Much of the relevant environment for an organization is – other organizations. As a society becomes more organizationally dense, the environment becomes more complex. Competitors, creditors, customers, suppliers, auditors, and regulators (in the form of government agencies) are among the more important organizations constituting the environment. (Tompkins, 1984, p. 704)

In the light of this, organisational communication is complex when the issue of *audience* is considered in relation to an advertising or public relations campaign. No longer is it assumed that the audience is a single group of organisational stakeholders, because rarely is an organisation speaking to only one audience. Often organisations are speaking to their employees, current customers, shareholders, competitors and even regulators. For example, any comments an RVO might make in its corporate newsletter about the *Retirement Villages Code of Practice* (2006) would communicate with a range of audiences including residents, employees, prospective residents, competitors, and regulators. Thus, promotional messages urging people to buy products may also “speak to” internal stakeholders (staff and residents in the case of RVOs) about the organisation they are members of and their association with the product they help to produce. Similarly, communication through annual reports and newsletters (Cheney & Frenette, 1993) may impact on organisational members’ sense of membership, as well the primary target audience.

Stable processes and active participants.

The final critique from Tompkins (1984) involved perspectives on change. Traditionally, organisations have been viewed as stable environments where rules, structures, and processes maintain a general “continuity of organisational features” (p. 661). However, there exist formal and informal processes, those that emerge with and without planning, as well as those that erupt through difference and conflict. In this view, individuals are “active participants in the continuous creation of social order” (p. 662). The processes of organisations are thus both subject to and the result of *member agency*.

People also draw on organisational rules to guide their everyday actions, in terms of appropriateness of actions (McPhee, 1985). Such structures, rules, procedures, and policies communicate information and guide individual responses (e.g., reception desk at the front door invites visitors to report there) (see Cooren, 1999, 2004; Cooren & Fairhurst, in press). However, they are not static reference points for organisational members. Organisational structures (e.g., reporting hierarchy) and processes (e.g., meeting facilitation) are the result of decisions made at some time in the life of the organisation. Thus, structures and processes are constituted in the everyday interaction rather than existing as a stable set of structures called “the organisation”.

Dynamic definitions of organisational communication.

In light of the above discussion, researchers need to view organisational communication as an intricate network of “arenas in which individuals and groups of individuals perform their actions” (Tompkins, 1984, p. 661). These arenas include both internal and external domains, as well as intra-organisational and inter-organisational communication. Tompkins (1984) adds a communication twist to Barnard’s (1938/1968) definition of organisation as “a system of consciously coordinated activities or forces of two or more persons” (p. 73). While others note the inherently communicative quality of this definition (e.g., Cheney, 1991; Galbraith, 1978), Tompkins spells it out: “*Organisational communication . . . [is] defined as the study of sending and receiving messages that create and maintain a system of consciously coordinated activities or forces of two or more people*” (p. 662-663, original emphasis).

The phrase “sending and receiving messages” should be interpreted broadly, as is shown by this definition of organisational communication: “the description, analysis, understanding and critique of communication practices in contemporary organizational life” (International Communication Association, 2004, p. 7). The phrase

“communication practices” refers to organisational processes such as messages, interactions, communication behaviours, communication strategies, symbols, discourses, as well as intended and unintended messages (International Communication Association, 2006). Moreover, the definition statement goes on to include “internal organizational” communication as well as “inter-organizational networks and the roles of the organization in the larger society” (p. 7). In sum, organisational communication study concerns “messages, symbols, meanings, and discourse, [and] . . . *these processes as they play out within, between, and about organisations*” (Simpson & Zorn, 2004, p. 15, emphasis added).

An organisational communication approach to research involving RVOs, would consider RVO communication activities to include the context of the broader organisational environment, day-to-day interactions between residents and RVO employees, as well as systems of influence. Specifically this approach enables me to consider the implications of the contract between RVO and residents where communication constitutes the RVO as both organisation and community. In addition, an organisational communication perspective considers RVOs *as* organisation and as *an* organisation. In this respect, this research is able to explore retirement villages as formal entities as operating in a complex communication environments, as well as systems of influence and interaction. Furthermore, an organisational communication approach ensures that residents’ voices are heard alongside those of other organisational members.

With regard to the internal-external communication boundary, RVOs communicate with multiple audiences including residents, potential residents, employees, and competitors. Even when targeting external audiences with advertisements for services and products, organisations are also promoting their services and products and even themselves to internal audiences (Cheney & Christensen, 2001) Therefore, the following section explores aspects of promotion as a particular form of external

communication that has special relevance for RVOs in that they speak to residents as well as employees, in addition to the target audience (primarily potential residents).

Promotion

In response to the emergence of a consumer society various communication methods have developed (Lury, 1996; Mort, 1989/2000). Changes such as market segmentation and an increasing emphasis on lifestyle have resulted in products and services being represented in terms of *lifestyle* rather than *satisfaction* (Leiss, Kline, & Jhally, 1990/2000; Lury, 1996). Furthermore, the communication activities of organisations concern more than simply the promotion of goods and services for sale, rather they now include self promotion and identity management. This part of the chapter discusses organisational communication within the discourse of promotion.

Advertising products and promoting producers.

Advertising is a central means by which modern capitalist societies organise markets for products and services (Dyer, 1982). It originally began as a means to directly promote a product or service where its function and possibly cost were the key information given (Dyer, 1982). However, by the 1920s, advertising was focusing on how a product or service could help the buyer achieve some level of personal appearance, professional qualities, or other benefit through its purchase (Ewen, 1976). Consistent with current exhortations for self-improvement, advertising at this time “encouraged self-criticism and distrust” and people were told “that they could consume their way out of any trouble or misfortune, real or invented (Dyer, 1982, p. 45).

Advertisements are now no longer the main communication methods for promoting consumption, but rather are *part of the total promotional programme of an organisation* (Christensen, 1995; Leiss et al.,

1990/2000; Lury, 1996). That is, marketing and public relations use advertising as part of their respective communication programmes (Christensen, 1995; Hutton, 2001). In recent times, advertising has crossed the boundary by moving from a primary focus on external communication with external consumers, to an additional focus of talking to internal organisational members (Cheney & Christensen, 2001; Christensen, 1995). Advertising is no longer solely about the sale of products and services. Rather it is about organisational self-promotion and processes of identification with the organisation and its products by a variety of stakeholders (Cheney & Christensen, 2001) including both customers and staff.

Promotion has been described as having three features. Firstly, promotion encapsulates activities of marketing, advertising, design, and the packaging of products and services in the commercial world. In simple terms this is the promotion for the purpose of selling. Secondly, promotion concerns communication activities related to promoting causes, programmes, and ideas that may or may not be commercially oriented (Christensen & Cheney 2000; Wernick, 1991/2000). Promotion for the purpose of social good includes issues such as health promotion, disaster relief, and accident prevention. Finally, promotion includes communication activities which address an organisation's management and communication of its image and identity concerns. This is self-promotion for the purpose of engendering identification of different stakeholders with the organisation. Such stakeholders include staff and investors as well as customers (Cheney, 1991).

Promotion is a useful concept in terms of studying organisational communication about retirement village living. For instance, advertisements about customer service, newspaper features (i.e., press releases) about RVO growth, or announcements of an RVO receiving a architectural design awards speak to prospective and current residents, employees, financial investors, and competitors. In this context, any

inconsistency between internal and external messages may soon be detected and possibly responded to by internal stakeholders. In RVOs, internal communication has an added complication in that residents are both *customers* of the organisation and *members* of the retirement village. Because residents have multiple roles and identities within the RVO (i.e., as organisation and as village), the concept of blurred communication boundaries becomes even more important.

Promotion is also significant in terms of the organisation's self promotion. Therefore, in the final section of this chapter I specifically address promotion concerning organisational values as one identification inducement strategy.

Promoting identity and identification.

One area of organisational communication to receive attention in recent years is the communication of the organisation's values. Values are principles or ideas that guide human behaviour and choices; they do not exist in nature, but are human creations (Cheney, 1999). Values are often held to be somehow good in themselves; that is, in the same way that virtues are inherently good. They are "those things treated as important and/or basic by individuals or groups" (Cheney & Vibbert, 1987, p. 175). Cheney and Frenette (1993) found in their study of annual accounts and in-house organs that organisations placed importance on *having* values as well as articulating what they were.

Differences between espoused values and those in use may be detected when individuals state their working values, yet demonstrate others when talking about their particular decisions and actions. Espoused values concern "what people will *say* in a variety of situations, but which may be out of line with what they will actually *do* in situations where those values should, in fact, be operating (Schein, 1992, p. 21, original emphasis). "Theories-in-use" on the other hand are underlying assumptions that inform and guide behaviour; they tell individuals "how

to perceive, think about, and feel about things" (Schein, 1992, p. 22). Differences between the espoused theories and theories-in-use emerge when individuals are unaware of their own assumptions (Argyris & Schön, 1974). This lack of awareness means that stated values and actual behaviour do not always match. This has implication for organisations promoting some values over others: for example, problems could arise if an RVO promotes itself as say, respecting residents while simultaneously restricting residents' choices in some way.

Similarly, underlying (value) premises of every day decisions may go unacknowledged but be unknowingly accepted. In an organisational setting, major value-oriented premises guide every-day minor directives, decisions and activities of organisation members (Cheney & Frenette, 1993). Value premises, such as "profit is good" or "competition is good", underpin organisation members' decision-making and activities in their jobs. However, *competing* values may make it difficult for organisation members to enact all values completely. The ways in which retirement village sales managers approach the sales process may differ according to the values they operationalise. One manager may operate on the basis of the organisation's growth and profit and so focus on monthly or annual sales targets. Another may focus on long term customer relationships at the expense of making immediate sales.

RVOs communicate values and provide different audiences with value-based reasons for accepting and identifying with the organisation and its messages. Investors may respond to values associated with innovation or profit, and residents may respond to humanistic or values associated with prestige and status. This is not to say that target audiences will respond to only one value statement, but rather that different values may appeal to different audiences, although they may also share some. Such communication activity is part of a trend where organisations promote values, issues, and identities, as well as their products, services, and activities. That is, in addition to promoting products, services, and

organisational activities, organisations are “selling” identity, and seeking customers, employees, and other stakeholders that identify with the organisation’s expressed identity and values.

In this way values are “forms of rationality that link individual and collective aims” (Cheney & Frenette, 1993, p. 55). They act “in part as points of reference in their own affairs; in part to structure their lives; in part, to be sure, to control the behaviour of others” (Cheney, 1999, p. 19). These multiple functions of values are important in the organisational context, because values guide individual practice as well as enable organisational members to monitor and enforce others’ practices within an organisational context. This may be termed as *identification with organisational values* in that following and enforcing practices that align with values assumes a level of commitment to those values.

A second important function of organisational communication is to generate and maintain corporate identity (Cheney & Christensen, 2000; van Riel, 1997). Initially an issue of consistency between visual and marketing communication (van Riel, 1997), corporate identity has come to be more broadly oriented. The extent of such organisational self-promotion shows that marketing has become the dominant paradigm in modern organisations.

Cheney (1991) writes: “Today there are a myriad of ways in which we tell others ‘who we are’, with organizational membership or affiliation being a primary indicator” (1991, p. 12). Organisational members include those who are employed by, or have other vested interests in the organisation, as well as other stakeholders, such as customers. “Who we are” implies a sense of belonging that comes from identification with an organisation. The nature of retirement village with its community dimension makes for a special relationship between operators and residents. Identification is important, not only for its role in relation to lifestyle choices, but also because of the opportunity for expressions of

affiliation with a given retirement village, the people who live there, and the RVO.

In relation to this thesis, identity and identification are important in two domains: RVOs are likely to engender identification of staff and residents; and retirement villages are likely to embody expressions of identities for older people. Part of the concern of this research is to examine how this works. Another aspect of this research is to examine the extent to which, and in what ways, marketisation has penetrated everyday practices within RVOs. This means considering the extent to which market-oriented language is used within RVOs and how the effects on resident-RVO and resident-employee relationships. It also means exploring the ways in which RVOs adopt or adapt new market or economic discourses to suit local conditions and practices? Finally, it means considering the ways and levels at which RVOs take on market discourses and how these effect fundamental changes in worldviews and practices.

Summary and Conclusion

This chapter addresses three major conceptual lenses for exploring communication and RVOs. The *first* lens concerns the role of consumption, leisure and identity where RVOs may be seen to encapsulate aspects of the commodification of leisure, retirement, and lifestyle. This lens poses questions about how wider societal trends influence RVOs including the effect of leisure consumption on individual identity claims of older person in relation to RVOs (whether residents or not).

The *second* lens concerns the three-way influence of marketisation; as a framework of market principles, a process of penetration, and as a widely accepted universal discourse that is not often closely examined in practice. Marketisation raises issues of participation in consumer society generally and with regard to RVOs, poses particular questions about how

residents-as-customers relate to RVOs and how employees relate to residents as customers.

The *third* lens, organisational communication, opens the way to a multi-dimensional exploration of these questions. Organisational communication also suggests other questions related to residents-as-organisation-members and how they participate in RVOs. This approach also suggests questions about RVO messages about and representations of older persons, ageing, and retirement, as well as how discourses influence RVO practices. In the context of an increasingly marketised sector, this study explores retirement villages as places to live, as organisations, and as products. In so doing, it raises questions about what it means for residents to be both *(co-)producers* and *customers* of a retirement village.

The next chapter details the philosophical and theoretical foundations, and methodological approaches used in this investigation. This is followed by the empirical chapters which explore in depth the emerging issues of organisational representations, retirement villages as community, and resident participation within retirement village organisations.

CHAPTER 5

METHODOLOGY AND METHODS

Introduction

This chapter explains the epistemological foundations and theoretical positions that inform the research design for the study. The *first* section discusses the original and emergent research questions for the study. The *second* section outlines the philosophical foundations for my approach to the research. In the *third* section, I explain my methodological position and intention to use both rhetorical criticism and critical discourse analysis. The *fourth* section explains the *research design* of the study. Here I describe the application of a case study approach, as well as the rationale for using a collective case study. This includes an explanation of my process for selecting participants which included employees and residents of retirement villages, as well as non-resident participants. In addition, I explain my decision to combine document analysis with interviews and focus groups. The *fifth* section of the chapter describes the data gathering processes and the *final* section explains the specific data analysis methods.

Research Questions and Reflections

When I began this research the main aim was to examine the role of organisational communication in the marketisation of ageing and retirement. The context of this examination was the organisational promotion of retirement villages and older persons' responses to retirement village living in New Zealand. I had two core objectives:

1. To understand the significance of organisational communication in the construction, maintenance, and possible exclusion of ideas about ageing, retirement, and retirement village living within the context of marketisation.

2. To investigate (re)presentations, images and perceptions of ageing in use; underlying assumptions and values; patterns of communication; and areas of convergence and divergence in communication between RVOs and residents and other people over 55-years of age within the context of marketisation.

Mid-way through data analysis, the aim and objectives were still of interest and relevant. However, the same could not be said of each of my research questions which were:

1. How RVOs represented ageing and retirement in their formal communication with residents and other stakeholders;
2. What strategies RVOs used in formal communication with residents and other stakeholders; and
3. How residents and other people over 55-years responded to organisational communication about retirement village living in the context of their own life and retirement experiences.

The first research question seemed clear cut and is addressed in some depth in Chapter 6. However, as I moved into the analysis of participant interview and focus group transcripts other communication issues, indirectly referred to in the third question as “organisational communication”, began to emerge. I was also having problems with the research questions. The second one was too “mechanistic” and restrictive for a nuanced analysis of the data, and the third seemed to imply a transmission-sender-receiver form of communication rather than a more complex view of communication.

The themes emerging from my multiple readings of the transcripts concerned the *interactions between retirement village residents, and RVO management and employees*. I made some progress by contextualising the themes within market discourses such as customer focus and also found both convergence and divergence between village residents and non-residents on ideas and experiences of retirement villages as community.

Also, I sensed that there was more to the residents' role as co-producer of the retirement village product than I had initially considered.

In March 2006, I received from George Cheney, my first supervisor, a clipping from *The New York Times* about a group of older people who had set up their own retirement community (Brown, 2006). When reading about these people, I noticed several things: the *agency* of the older people themselves, *involvement* in their community, and the *absence of a third-party, formal organisation*. This group of older people, it seemed was both the community *and* the organisation. I realised the possibility of framing my analysis within a meta-theme of *participation*; that is residents' participation as members of the village-as-community and village-as-organisation. Within an organisational communication study, this also meant exploring communication messages, practices, activities, and interactions – aspects of RVOs I had already identified in the initial analysis. This meant I could focus on interactions between employees (members of village-as-organisation) and residents, as well as those between the corporation (RVO) and residents within the rubric of *organisational participation*. This insight meant I needed to turn to the literature on community and workplace participation, and so the empirical chapters of the thesis are written as almost-stand-alone works. The key things to note for now are the central emerging communication issues and how they relate to understandings of participation.

The three emerging communication issues – community, participation, and transformation – fall within the definition of organisational communication research (presented in Chapter 4) as focusing on “messages, symbols, meanings, and discourse . . . as they play out within, between, and about organisations” (Simpson & Zorn, 2004, p. 15). The first issue concerned distinctions between the retirement village as an organisation and as a community. The issue of community seemed important because it paralleled and yet simultaneously challenged “natural” ideas and expectations about organisational *belonging*. Central to

understanding both attraction and resistance to retirement villages were the ways RVO employees, residents, and non-residents talked about retirement villages as *community*, and the challenges experienced by retirement village residents and other older people in claiming, creating, and maintaining a sense of community.

The second issue concerned how all participants (residents, non-residents, and RVO employees) expressed different views on *residents' roles* within the retirement village as both organisation and as community. This issue raised questions about residents *participating* in the RVO as community and as organisation, as well as how this participation was managed, by whom, and to whose benefit.

The third emerging issue concerned residents' and RVO employees' different views on *RVO roles*. This issue raised questions about what it meant for RVOs to be *customer-focused*, as well as what it meant for residents to be *customers*. This issue also concerned how resident participation was enacted when residents were considered "customers".

The first original research question remained: that is, how RVOs *represented* older people, retirement, and themselves in their formal communication with residents and other stakeholders. However, in the light of the emerging issues, this question took on a participative angle; concerning representations of retirement village living in promotional material and the implications for residents' participation, RVOs, and society in general.

Qualitative research is about remaining flexible and responsive to emerging issues – in other words, being *emic* (participant) in orientation (Denzin & Lincoln, 2005b; Patton, 2002). My modifications to the research foci demonstrate how it is possible to respond to emerging participant-oriented issues while maintaining (and extending) my own research interests. With these issues and orientations in mind, I now address the philosophical and research positions undertaken in this study; for "in order to be meaningful to others, the uniqueness of our own research

experience gains significance when it is related to the theories of our predecessors and the research of our contemporaries” (Vidich & Lyman, 2000, p. 62).

Philosophical Foundations

Social constructionism is the foundational epistemology for various poststructuralist or postmodern research paradigms which converge and diverge at different points on the subjective-objective continuum (W. Potter, 1996). Interpretive and critical paradigms, for instance, share an assumption that it is possible to learn about the world but they differ in their approaches to learning about the world. *Interpretivists* tend to focus on micro-level, individual understandings of reality and *critical* researchers tend to focus on macro-level, societal patterns and norms that help to shape micro-level interactions. For this study I take a critical-interpretive position, and explain my reasons below. I begin by outlining the principles of social constructionism and then compare and contrast interpretive and critical approaches.

Principles of Social Constructionism

The *first* assumption of social constructionism is that human knowledge – or reality – is constructed and sustained through human interaction (Allen, 2005; Berger & Luckmann, 1966; Burr, 2000; Gergen, 1994; W. Potter, 1996). For social constructionists realities are socially constructed rather than objective sets of arrangements external to ourselves (Berger & Luckmann, 1966). However, social constructionists accept that physical and social contexts exist “independent of our own volition” (Berger & Luckmann, 1966, p. 13) and that there is “reality that eludes our understanding” (Orr, 1978, p. 274). At a practical level, Estes (1993) points out that “phenomena associated with chronological aging and intrinsic biological conditions may be said to be objectively real, regardless of how they are perceived” (p. 292). Thus the social construction of reality is defined as “the relationship between human

thought and the social context within which it arises" (Berger & Luckmann, 1966, p. 16). In this way reality cannot be experienced outside the limits and influence of one's own perceptions – that is, objectively (W. Potter, 1996).

The *second* assumption of social constructionism is that reality is constructed, interpreted, and experienced differently by different individuals and groups. That is, social constructionism can be concerned with communication processes (e.g., the reality of conversations); and products (e.g., the realities of symbols, language, and meanings); and the lived realities of both, that is, "material details [which] influence and are influenced by socio-historical contexts" (Allen, 2005, p. 39). Thus, reality is not something we simply observe: It is something we create and maintain in communication (Orr, 1978).

Although individuals have unique experiences and ways of seeing the world, they are also conditioned by social and political contexts (Denzin & Lincoln, 2005a, 2005b) and phenomena which inform, guide, and bind them to accepted interpretations and behaviours in a given context. Therefore, the *third* principle of social constructionism is that human reality is linguistically, culturally, and historically situated (Berger & Luckmann, 1966; Burr, 2000; Gadamer, 1975, 1988; Gergen, 1994; W. Potter, 1996; Schwandt, 2000).

Social constructionism acknowledges that individual action must be considered within wider *social and political* contexts, which include *material* (economic, practical, physical, and bodily) realities. Poverty, war, and hunger are material phenomena that, no matter how they appear in discourse, remain material realities for individuals (Cloud, 1994). A materialist view of communication takes into account the significance of economic and physical forces while acknowledging the use of symbolic resources (Cheney & Cloud, 2006) or "the persuasive force of rhetoric" (Cloud, 1994, p. 158). From this standpoint, *discourse* is not *everything* (Cloud, 1994; Cheney & Cloud, 2006) and it is necessary to examine "how

it is that physical things shape and limit symbols and how symbols affect physical things, economic relations, and what we call more generally *reality*" (Cheney & Cloud, 2006, p. 508, original emphasis). In short, material realities may be responses to and/or informing of socially constructed realities.

It is also important to examine historical influences on current social phenomena. This focus assists the researcher to identify ways in which norms institutionalise power relations that disadvantage and marginalise some groups of people. Within communication, critical researchers examine ways in which the concerns of dominant groups are privileged in day-to-day discourses (Cheney, 2000a, 2000b; Deetz, 1996; Mumby, 1997a, 1997b). For example, as was outlined in Chapter 3, Western norms about ageing and retirement have changed rapidly over the last half-century (Blaikie, 1999). Critical researchers have identified ways in which medicalisation has shaped norms of ageing to the detriment of older people themselves (Estes & Associates, 2001; Phillipson, 1998; Saville-Smith, 1993).

One other phenomenon which guides human behaviour is organisational structures. It has been argued that organisational structures are inherently communicative (McPhee, 1985) and that apparently neutral organisational processes and structures (Hardy & Clegg, 1999) shape member interactions. Moreover, taken-for-granted understandings are often hidden in processes of "discursive closure" (Deetz, 1992, p. 187; Deetz & Kersten, 1983). The organisational interactive flows of member negotiation, organisational self-structuring, activity coordination, and institutional positioning are constituted in communication (McPhee & Zaugg, 2000). In addition, it has been argued that these communication flows result from micro-interactions and *do something* in organisations (Cooren & Fairhurst, in press). Thus, linguistic, cultural, and historical contexts shape and infuse day-to-day interactions.

The *fourth* assumption of social constructionism is that language is fundamental to thought and sharing experiences and meanings about human experience of the world (Burr, 2000; Denzin & Lincoln, 2005a). That is, language has meaning because it can be taken as something (Gadamer, 1975, 1988; Schwandt, 2000). Language is important to social constructionism at the individual-micro, organisational-meso, and societal-macro levels.

At the individual, *micro*-level, each instance of language-use produces a particular version of what it is supposed to represent, and therefore constructs reality (Alvesson & Kärreman, 2000b; W. Potter, 1996). Language not only constructs the world through descriptions, accounts, and reports, but also constructs the descriptions, accounts, and reports themselves (J. Potter, 1996). Thus, meaning is not a purely cognitive process and does not reside in the heads of people. Rather, meaning resides in the individual situated here-and-now within systems of discourse (Mumby, 1997a). Individual meaning (i.e., reality) is “organized around the ‘here’ of my body and ‘now’ of my present” (Berger & Luckmann, 1966, p. 36), within discourses which help to orient the individual to *preferred readings* (Foss, 2004; Hall, 1993; Locke, 2004) through historical familiarity and accepted authority (J. Potter, 1996). Cooren and Fairhurst (in press) illustrate how within organisations, “here and now” (sec. 2, ¶ 9) activities (e.g., day-to-day interactions) are influenced by the organisational “there and then” (sec. 2, ¶ 9) (i.e., accepted organisational processes and structures). That is, the immanent, micro-level interactions are infused by the transcendent macro-level that links events and actions to one another through space and time.

At the *macro*-level, constructionism focuses on “the collective generation of meaning” and “emphasises the hold our culture has on us: it shapes the way in which we see things . . . and gives us quite a definite view of the world” (Crotty, 1998, p. 58). In this way constructionism is inherently communicative because “collective generation of meaning” is

constituted in communication (Cheney, 2000b; Mumby, 1997a). Although van Dijk (2001a) says that “language use, discourse, verbal interaction, and communication belong at the *microlevel*” (p. 354, emphasis added), he argues that local and global contexts are closely related. Moreover, he goes on to say, “In everyday interaction and experience the macro- and microlevel (and intermediary ‘mesolevels’) form one unified whole” (p. 354). In sum, language plays a constitutive role in the social construction of reality at all three levels of the social world (Deetz & Kersten, 1983; Mumby, 1997a, van Dijk, 2001a, 2001b, 2004).

Consider the construction of *retirement*. In New Zealand the institution of old age pensions helped to socially construct what it was to be older, and over the last century these constructions have shifted across social, economic, and market discourses. Terms used include “deserving poor”, “senior citizens”, and “retirees” which suggest social roles, and in the case of “deserving poor” societal responsibility. On the other hand, “pensioners”, “superannuitants”, and “economic burden” relegate older people to an economic status – with “economic burden” being negatively characterised. Such orientations influence interactions between people.

In the context of organisations Cooren (1999, 2004; also Cooren & Fairhurst, in press) adds another dimension to the language-discourse principle. He argues that not only are organisational activities *discursively structured*, but that organisational structures (nonhuman artefacts) have a form of *agency*. Following Latour (1987, 1993, 1994, 1996), Cooren states that in order to bridge the gap between people and organisational structures we must acknowledge the *actions of objects*: that is, the *agency of nonhuman entities*. There are *textual forms* of nonhuman entities which include status, rules, titles, procedures, and protocols – all embedded in language. In addition, there are *non-textual artefacts* such as monitoring devices, uniforms, and architectural features which also have communicative aspects (Cooren & Fairhurst, in press). In particular, he asks that we notice how humans exchange properties with nonhumans.

Cooren (2004) uses Latour's (1994) example of a gun in someone's hand to highlight the role of organisational *texts*:

The gun is different in a person's hand; just as the person is different with the gun in his hand. Knowledge of this *hybrid relationship* helps us to understand the role texts play in organizational settings. (p. 377, emphasis added)

In short, texts and organisational members do things together, that independent of each other they could not. Thus, Cooren argues that discursive actions should be considered *facts*, because they "consist of doing things" (1999, p. 301) and can also "make a difference" (2004, p. 375, original emphasis) in the context of organisational life. That is, "discursive acts create . . . *institutional facts* that are as objective and real as brute facts" (Cooren, 1999, p. 301, emphasis added).

Thus, in Cooren's (1999, 2004; also Cooren & Fairhurst, in press) view texts have agency. Cooren (2004) applies to both written and oral texts Smith's (2001) definition of text: "definite forms of words, numbers or images that exist in a materially *replicable* form" (p. 164, emphasis added). He argues that both forms can be replicated through being remembered either as "memory traces" (Cooren & Fairhurst, in press, sec. 3, part 2, ¶ 10) or through being mechanically or digitally recorded. According to Cooren, what defines the notion of text is its "iterability" (p. 398): that is, "its *repeatability* under the form of quotation or mechanical reproduction" (Derrida, 1988, p. 389, emphasis added). From this position, Cooren and Fairhurst (in press) argue that organisational "procedures have the capacity to do *the same things at any time*" (sec. 5, ¶ 4, original emphasis; also see McPhee, 1985). Significantly, it is "through a local interaction that something apparently more global (a company, a department, even a country) can be said to talk or do something" (Cooren & Fairhurst, in press, sec. 5, ¶ 21).

Following on from the above, the *fifth* assumption of social constructionism is that knowledge and social action are interconnected (Burr, 2000). Cultural contexts influence, and are influenced by social

interactions that enact societal norms to guide ongoing interaction. For example, societal representations, and norms of ageing (Estes et al., 2001) and retirement (Ekerdt, Kosloski, & DeViney, 2000) are constructed in interaction among people and differ from one cultural setting to another. However, the influence of norms is such that we often accept them without question because they are almost invisible to us (Berger & Luckmann, 1966). It is only when we come in contact with people who have different norms, that we may notice not only differences, but also our own positions. Moreover, the social norms of a given social group may change over time.

In sum, social constructionism enables us to challenge the idea that any given reality (economic or political) is permanent or the only one, and to view representations of reality as constructs (Cloud, 1994). Thus, within a social constructionist worldview, examining macro-level contexts help us to see how they shape meso- and micro-level interactions (and vice-versa). In the context of RVOs, this means considering how historical and contemporary attitudes towards ageing and current trends in consumption help to shape interactions between retirement village residents and employees. Likewise, examining meso-level communication practices in RVOs (e.g., promotional material and resident-corporation communication), as well as micro-level communication activities of residents and employees (e.g., resident-village employee communication forums) can identify the multiple meanings negotiated that in turn contribute to broader discourses. To focus on micro-, meso-, and macro-levels enables researchers to notice a range of aspects that influence and shape lived experiences. The capacity of social constructionism to span different contextual levels, led me to employ both interpretive and critical approaches in my research.

Interpretivist and Critical Epistemologies

Research from an interpretive stance focuses on how individuals understand their actions in the social world (Cheney, 2000b; Denzin & Lincoln, 2005a, 2005b; Heracleous, 2004; Patton, 2002; Schwandt, 2000). The emphasis of an interpretive position is the promotion and representation of inter-subjective understanding as expressed in what Habermas (1971) calls the “historical-hermeneutic” impulse for research. In this approach, “[a]ccess to the facts is provided by understanding of meaning, not observation” (p. 309). Thus, this perspective privileges individuals’ interpretation of social phenomena (and interprets that interpretation), and accepts that there are other interpretations of the same phenomena. In short, *interpretive research privileges understanding over explanation*. In order to come to understand the interpretive acts the researcher needs to be “other” oriented, and sensitive to emergent understanding, as well as those different to his or her own (Denzin & Lincoln, 2005b; Gadamer, 1975; Schwandt, 2000).

Interpretivist perspectives have been criticised for being too localised and focused on individual understandings at the expense of other influences such as social factors and power dynamics (Cheney, 2000b). Therefore, in order to consider such factors, a researcher may use different research perspectives either together or sequentially (Cheney, 2000b; Schultz & Hatch, 1996). One choice to consider is the use of a critical perspective with an interpretivist position.

The essence of a critical perspective is (a) a concern for power relations, (b) an insistence on passing value judgments where unnecessary inequality exists, and (c) an orientation toward progressive social change (e.g., Kincheloe & McLaren, 2005; Mumby, 2000). In relation to this study, there are critical works about institutionalised notions of retirement and attitudes towards ageing (e.g. Blaikie, 1999; Estes, 1979, 1993; Phillipson, 1998). With respect to the macro issues, the goal of a critical lens is to reveal concealed realities that ordinary members of society do not see

(Deetz & Kersten, 1983; Kincheloe & McLaren, 2005; Mumby, 1997a, 2000; van Dijk, 2001a). In order to reveal such realities, researchers need to take into account micro-level practices and interpretations, as well as analysis of the bigger picture. In this way, the researcher critiques and brings his or her perspective to the enquiry to reconstruct an alternative understanding that helps to redress identified injustices (Deetz & Kersten, 1983; Kincheloe & McLaren, 2005; Mumby, 2000; van Dijk, 2001a). In short, *a critical approach examines taken-for-granted understandings of the world and seeks to propose alternative understandings*. Thus, while focusing on micro-level, individual understanding, a critical approach combines *meso-level* and *macro-level* approaches to connect these meanings in organisational and social systems (Alvesson & Karreman, 2000a, 2000b; Deetz, 1996, 2001; Mumby, 2000; van Dijk, 2001a).

Even so, there is much debate about the incommensurability of research paradigms (Burrell, 1996; Burrell & Morgan, 1979; Corman & Poole, 2000; Schultz & Hatch, 1996). Yet, while some researchers have argued about the incommensurability of paradigms, others have focused on the blurred and overlapping “edges” of discourses. Burrell (1996) emphasises paradigm boundaries and their contained and value-laden dimensions when he writes:

The paradigm marks out, in an agreed and deep seated sense, a way of seeing the world and how it should be studied, and . . . this view is shared by a group of scientists who live in a community marked by a common conceptual language, who seek to build upon a shared conceptual edifice and who are possessed of a very defensive political posture to outsiders. (p. 647)

Other scholars, however, accept paradigms as “sets of ontological and epistemological assumptions but . . . do not accept the paradigm incommensurability argument” (Schultz & Hatch, 1996, p. 529) and argue that the researcher who works with competing and overlapping paradigms is a “*bricoleur-theorist*” (Denzin & Lincoln, 2005b, p. 6, original emphasis). Moreover, research positions have been reframed as

perspectives and *discourses* rather than demarcated paradigms (Deetz, 1996; Denzin & Lincoln, 2005b; Mumby, 1997a). In particular, communication scholars focus on the concept of discourse (Alvesson & Deetz, 1996; Deetz, 1996; Mumby, 1997a) which helps to express arguments and engage in research practices rather than provide “a means of reconstructive self-naming” (Deetz, 1996, p. 198). The conceptualisation of research perspectives as discourses enables a more dynamic approach than bounded paradigms, because discourses are open rather than sealed (Deetz, 1996; Mumby, 1997a). I should note that while the concept of discourses is helpful in encouraging shifting research perspectives, research itself involves *material practices* with *material effects*: That is, the researcher’s and participants’ actions have mutually influencing effects.

In the light of the above, interpretive and critical discourses provide “an orientation to organizations, a way of constituting people and events in them, and a way of reporting on them” (Deetz, 1996, p. 198). Rather than being a mirror of society, research discourses offer *lenses* through which to explore society differently. For example, market and medical models are framed as discourses that prescribe language and practices that construct and constitute RVOs and their products differently. From a research perspective, interpretive and critical lenses enable the study of such constructions at the individual-micro, organisational-meso, and societal-macro levels (Alvesson & Karreman, 2000a, 2000b; Cheney, 2000b; Deetz, 1996; Mumby, 2000). Moving from the local to global contexts, from micro-, to meso-, and to macro-views enables multiple levels of exploration that develop greater understanding of a given field of study. If a fundamental principle of research is to improve the (material) human condition, then to ignore macro-level factors is to do a disservice to humanity.

Reflexivity: Understanding, Explanation, and Critique

A research goal of *understanding* has implications for research methods, processes, and orientation. It implies exploring complexities of interrelationships in a given enquiry (Gadamer, 1988; Schwandt, 2000; Stake, 1995, 2005). In contrast, a goal of *explanation* implies being able to discover causes and therefore to predict and control similar situations (Stake, 1995, 2005; Yin, 2003). This distinction between explanation and understanding implies that in the research process, understanding requires more than examination of data to illuminate cause and effect. That is, for understanding to transpire, there is some attempt to grasp another's understanding of their situation *from the inside* – what it is like for them. This is the principle of an interpretive approach to research and is captured in the concepts of “empathic neutrality” (Patton, 2002, p. 40) and “empathic identification” (Schwandt, 2000, p. 192).

Patton (2002) describes empathy as “a stance toward the people one encounters – it communicates understanding, interest, and caring” (p. 53) towards an actor's experience and interpretations, and commentary about these. Empathy also implies a sense of acceptance without judgement – particularly when used in conjunction with neutrality. Similarly, Schwandt (2000) describes empathic identification as “an act of psychological re-enactment – getting inside the head of an actor” (p. 192). These positions enable the interpretive investigator to be open to learning something new; to be open to alternative interpretations of real world events and experiences; and to participate in shared meaning (Gadamer, 1988). While it is debated whether an enquirer is able to “get inside the head” of another, empathetic identification “is a powerful central concept for understanding the purpose of qualitative inquiry” (Schwandt, 2000, p. 192). Such an approach helps to guide the research process with an *emic* or *actor* orientation rather than *etic* or *researcher* orientation (Patton, 2002; Schwandt, 2000; Vidich & Lyman, 2000).

The principle of reflexivity is fundamental to non-positivist research (Guba & Lincoln, 2005) in a number of different ways. As Patton (2002) points out, in the research process

the qualitative analyst owns and is reflective about her or his own voice and perspective; a credible voice conveys authenticity and trustworthiness; complete objectivity being impossible and pure subjectivity undermining credibility, the researcher's focus becomes balance – understanding and depicting the world authentically in all its complexity while being self-analytical, politically aware, and reflexive in consciousness". (p. 41)

The first step is for the researcher to be clear about her or his philosophical position and research orientation which underpin the research process. Practically speaking, this means ensuring that researcher-participant relationships, data gathering and analysis methods, for example, are consistent with the researcher's articulated philosophy (Denzin & Lincoln, 2005b; Patton, 2002). Reflexivity therefore, involves reflecting on the multiple aspects of the research process.

Part of the process is for researchers to explicitly state their philosophical and theoretical location for the research, as this provides (both researcher and reader) with a context in which the research is constructed and analysed (Stanley & Wise, 1993). In terms of my approach to this research, the introductory chapter provides an account of the origins of this research. In the sections following here, I discuss my theoretical frameworks, data gathering and analysis procedures.

It is generally accepted that when the outsider-researcher enters a field of study and engages with participants both parties influence and will be influenced in the interaction with the other and bring something different to the enquiry (Denzin & Lincoln, 2005a; Guba & Lincoln, 2005; Patton, 2002; Vidich & Lyman, 2000). Efforts to put myself "in the shoes" of retirement village residents, older people, and retirement village employees were revealing. I realised that I had once been an insider of "retirement villages" as an employee; I was also an outsider as an academic returning to the field. In this respect I brought two kinds of

knowledge resources to the research. At the same time, I acknowledged I was an outsider to residents' own experiences in retirement villages and an outsider to their experiences as a generation. As the researcher it was my job to ensure that these different participant perspectives and experiences were expressed at various points in the research process. In this respect, the researcher becomes a "co-ordinator of the voices" (Gergen & Gergen, 2000, p. 1028).

One remaining challenge was how to account for my voice, while ensuring that participants' voices were heard. I had to accept that "the investigator functions as the ultimate author of the work . . . and thus serves as the ultimate arbiter of inclusion, emphasis, and integration" (Gergen & Gergen, 2000, p. 1028). One resident said to me of the research, "It's really your interpretation" (Residents' Focus Group). Therefore, my only recourse was to declare my biases, my background, and my interests, but not claim these to be the "only reality"; rather to engage them in order to understand (Gadamer, 1975; Schwandt, 2000). As Stanley and Wise (1993) write

Whether we like it or not, researchers remain human beings complete with the usual assembly of feelings, failings and moods. And all of these things influence how we feel and understand what is going on. Our consciousness is always the medium through which research occurs; there is no method or techniques of doing research other than through the medium of the researcher. (p. 157)

In taking responsibility for instigating the research I sought to be an ethical researcher. I therefore, tried to articulate a sense of openness with the participants and their stories, maintain awareness of enacting my own philosophical stance, and aimed to use my own voice ethically and legitimately in the research process.

My goals for this research were to understand the experiences of RVOs, their residents, and employees, and explore interactions and relationships between the different organisational and community actors. My chosen research methods aimed to keep me attuned to the stories and

texts of participants, while being sensitive to the broader organisational and social contexts. In order to facilitate this balancing act I adopted a *bricolage* of theoretical approaches and procedural methods (Denzin & Lincoln 2005b; Deetz, 2001; Deetz & Kersten, 1983; Kincheloe & McLaren, 2005) in my research design: That is, “a pieced-together set of representations that is fitted to the specifics of a complex situation” (Denzin & Lincoln, 2005b, p. 4). Specifically, I undertook this research founded on social constructionism, using interpretive and critical theoretical lenses. The next section discusses my methodological framework.

Methodological Frameworks: Rhetorical Criticism and Critical Discourse Analysis

While rhetorical criticism (RC) and critical discourse analysis (CDA) differ in intellectual foundations each offers *critically oriented* epistemological stances and theoretical concepts (Cheney with Lair, 2005; Livesey, 2002). Both RC and CDA share with pragmatics a concern for the practicalities of language in use. As Livesey (2002) summarises:

A rhetorical approach offers techniques by which to analyze features of language in detail and consider its immediate, often polarizing, effects in specific controversies. The Foucauldian [or CDA] perspective, on the other hand, helps the researcher to understand the implications of local struggles and conflicts in terms of change at the social [macro] and institutional [meso] level. (p. 141)

Briefly, CDA revolves around notions of *power* (Fairclough, 1989, 1992; Mumby & Clair, 1997), and rhetorical criticism around *persuasion* and *identification* (Cheney with Lair, 2005; Cheney, Christensen, Conrad & Lair, 2004). Also, in its increasingly critical form, RC has been influenced by the same theoretical movements as CDA, including critical theory, poststructuralism, and postmodernism (e.g., Livesey, 2002).

They are both “critique-al” in orientation. CDA is concerned with *describing* properties of text, *interpreting* the relationships between text and

interaction, and then *explaining* – critique is implied – the relationship between interaction and context (Fairclough, 1989). RC on the other hand is defined as “*the description, interpretation, analysis, and critique of organized persuasion – and by extension, identification*” (Cheney with Lair, 2005, p. 60, original emphasis). Thus both approaches are concerned with looking beyond “the facts” and making connections between language, texts, and meanings.

These similarities and differences between RC and CDA create complementary and productive approaches to data analysis, for as Cheney with Lair (2005) note “the joining of their characteristic concepts and techniques makes for a broad and rich assessment of contemporary organizational activities” (p. 69).

Critical Discourse Analysis

Proponents of CDA emphasise that it is not a single method, but rather “discourse analysis ‘with an attitude’” (van Dijk, 2001b, p. 96); an approach that responds to specific social and political issues through the close examination of a defined body of messages (Fairclough, 1992; van Dijk, 2001b, 2004). CDA has been defined as “a type of discourse analysis research that primarily studies the way social power abuse, dominance, and inequality are enacted, reproduced, and resisted by text and talk in the social and political context” (van Dijk, 2001a, p. 352). From a Foucauldian perspective, discourses are sets of statements or universalised ideas that establish what is acceptable and accepted within given social, political, and organisational domains. Thus they include “symbolic systems, institutional structures, and social rules and practices” (Livesey, 2002, p. 122). In these domains, CDA focuses on knowledge, power, and ideology (e.g., van Dijk, 2001a, 2001b).

Kress (1985) makes a distinction between *discourse* and *text*:

Discourse is a category that belongs to and derives from the *social domain*, and *text* is a category that belongs to and derives from the *linguistic domain*. The relation between the two is one of realization:

Discourse finds its expression in text. However, this is never a straightforward relation: any one text may be the expression or realization of a number of sometimes competing and contradictory discourses. (p. 27, emphasis added)

For example, medical and market discourses about retirement may be viewed as competing discourses in that the former is often associated with inevitable decline and the later with unlimited choice. Kress stresses the multiplicity and complexity of discourse expressed in texts within the *linguistic* domain – which is “not to be confused simply with language” (Livesey, 2002, p. 122). Rather, Kress argues that discourse finds *expression* in text, and derives from the social domain. Likewise, Jonathan Potter (1996) identifies discourse as “*talk and texts as parts of social practices*” (p. 105, original emphasis). Thus, discourse also finds expression in *social practices* at micro-, meso-, and macro-levels (Fairclough, 1992, 1993; Foucault, 1984; van Dijk 2001a, 2001b, 2004). This emphasis links to the point made earlier, that social constructionism requires investigation at these three levels.

At these different levels, the role of CDA is to explicate the *dynamic power relationships* between individual talk and action, organisation talk and practices, and cultural formats and representations (Fairclough, 1992, 1993; Iedema & Wodak, 1999; Kress, 1985; van Dijk, 1985, 2001b). This includes hegemonic, non-coercive relationships in which subordinated people consent to and support a system that does not necessarily serve their interests (Mumby, 1997b). While, older people consent to participate in the retirement village sector some may argue that it is not in their long-term, material (e.g., financial) interests.

In this way then, CDA is a multi-level approach linking day-to-day language and practice, with everyday power relationships, and the broader orders of discourse in society (Fairclough, 1992, 1993; Iedema & Wodak, 1999; Titscher, Meyer, Wodak, & Vetter, 2000). However, attempting to address both micro- and macro-levels of discourse has its challenges (Alvesson & Karreman, 2000a, 2000b). The study of discourse

focuses on emerging and local constructions of reality, and may begin from an *a priori* position. In this research, I began with an *a priori* position that “marketisation” was (somehow) influencing the retirement village sector. In order to avoid a “set up job”, I had to be careful that I remained open to the emergence of other discourses and meanings from the data. Therefore, as the researcher, I needed to be clear about how one may inform and/or shape the other. To do this, I needed to first understand *ideology*.

Ideologies are “fundamental or axiomatic” belief systems that “control and organize other socially shared beliefs” (van Dijk, 2004, sec. 2.1, ¶ 3). They are gradually acquired and so widely shared that they become generally accepted as “normal” attitudes, beliefs, or opinions. Thus, from a CDA perspective, ideologies are the basis for other discourses and social practices, and the “interface between social structures (conditions etc) of groups on one hand, and their discourses and other social practices on the other hand” (van Dijk, 2004, sec. 2.4, ¶ 4). Through social practices ideologies can be seen to have material consequences. Thus, CDA seeks to uncover “historically specific, interest-rooted motives” of social actors and structures rather than only focus on “ideas as the motor of history” (Cloud, 1994, p. 145).

Deetz and Kersten (1983) identify four functions of ideology. First, ideologies legitimatise existing social order; second, through structuring reality, they mask contradictions within social orders; third, they “mystify” social order through “covering up motives and interests or through, reification, and alienation” (p. 164) ; and finally, ideologies control and “create a consensus regarding the way the world is and the way it should be” (p. 164). The “naturalising” processes of ideology result in *preferred meanings and readings* (Hall, 1993). Meaning is not fixed and relies on *connotative* or associative meanings, as well as *denotative* or literal, “almost universally recognized” (Hall, 1993, p. 93) meanings to be

realised. However, it is at the connotative level that ideologies *transform* meanings. As Hall explains:

The different areas of social life appear to be mapped out into discursive domains, hierarchically organized into *dominant or preferred meanings*. New, problematic or troubling events . . . must be assigned to their discursive domains before they can be said to “make sense”. The most common way of “mapping” them is to assign the new to some domain or other of the existing “maps of problematic social reality”. We say *dominant*, not “determined”, because it is always possible to order, classify, assign, and decode an event within more than one “mapping”. But we say “dominant” because there exists a pattern of “preferred readings”; and these both have the institutional/ political/ideological order imprinted in them and have themselves become institutionalized. (1993, p. 98, original emphasis)

Thus, in the light of the above, critical analysis aims to (a) recognise and reveal the preferred readings (Foss, 2004, Hall, 1993; Locke, 2004;) and “most acceptable course of action” (Rybacki & Rybacki, 1991, p. 3) from a speaker’s perspective; (b) reveal the ideologies that legitimate, infuse, and support such readings and action; and (c) propose alternative readings and actions (Foss, 2004, Hall, 1993; Kincheloe & McLaren, 2005; Locke, 2004; Mumby, 2000; Rybacki & Rybacki, 1991).

Teun van Dijk (2001b) suggests three main levels of CDA: *global meanings* or topics which, although they cannot be directly observed, influence “mental models” (p. 112); *local meanings* derived from the choice and use of words which are shaped by mental models and shared beliefs; and the *formal structures* of talk and text including genre categories as well as syntactical aspects. CDA, van Dijk (2004) argues, should focus on context, meaning, form, and action to reveal expressions of ideology. These aspects include the presentation and positive/negative meanings for “us” and “them”; headlines, titles, summaries, conclusions; argument structures; and rhetorical forms such as metaphors, comparisons, and hyperbole.

In a similar vein, Fairclough (1992) identifies three dimensions of discourse production and reproduction: (a) *textual practice*; (b) *discursive*

practice; and (c) *social* practice. Each domain corresponds to a different layer of analysis.

Analysis at the level of *textual practice* focuses on how the text draws on multiple discourses (*interdiscursivity*) and the ways in which specific texts are used to construct a given text (*intertextuality*) (Fairclough, 1992; Locke, 2004). *Interdiscursivity* may be evident in how RVO brochures draw on discourses of the market, active ageing, and retirement-as-leisure to promote retirement villages for both financial and social investment. *Intertextuality* may be seen, for example, in the way RVOs use types of images and language similar to hotels and resorts (see Laws, 1995; McHugh, 2000, 2003).

At the *discursive practice* level, analysis focuses on how the text at hand becomes part of an “*intertextual chain* in being transformed into other text types” (Locke, 2004, p. 43, original emphasis). RVOs may create intertextual chains of texts through images, messages, and themes that draw on various constructions of retirement in their print, web, radio, and television advertising.

Finally, analysis of *social practice* focuses on *text interpretation* and is concerned with questions about “the extent to which readers . . . are disposed to subscribe to a text’s ‘*preferred*’ reading . . . and how readers *actually* respond to a text” (Locke, 2004, p. 43-44, original emphasis). In this study, retirement village residents may understand organisational *intentions* stated within promotional material and also assess how these intentions manifest in *practice*. It is at these levels of the text that CDA and RC begin to converge, for texts “(a) exhibit complexity in terms of the *linguistic* resources we draw upon to make and understand them, (b) perform critical *rhetorical* functions for the participants involved, and (c) powerfully summon and propagate the *social* orders in which we live” (Stillar, 1998, p. 1, emphasis added). In sum CDA highlights issues of power and ideology in explicating the dynamic relationships between textual, discursive, and social practices.

Rhetorical Criticism

Rhetorical criticism traditionally focuses on *persuasive or potentially persuasive* aspects of text such as the forms of expressions and communicative intentions of the author, speaker, writer, or rhetor of a given text (Gill & Whedbee, 1997). RC is concerned with expectations created by the context; what the text presents to a given audience; and features of the text that are significant (Foss, 1996, 2004; Gill & Whedbee, 1997; Rybacki & Rybacki, 1991). Analysis may include circumstances under which the text is written, the author and author's persona and intended audience; how an *implied* audience is created by the presence of certain ideas, images, and language use, and the absence of others (Wander, 1984); as well as specific textual features (Foss, 1996, 2004; Gill & Whedbee, 1997; Rybacki & Rybacki, 1991).

Rhetoric involves choices and the will of the rhetor about the message—its form, content, and structure. Rhetoric is created in that it is dependent on human control and will (Foss, 1996, 2004). Moreover, there is some degree of intentionality in rhetoric (although there may be unintended consequences): “[r]hetorical acts are primarily instrumental because they are intended to *do something*” (Rybacki & Rybacki, 1991, p. 2, emphasis added). In this respect, rhetorical acts imply some level of choice about the premise for arguments in use, suasive communication, and the rhetorical situation. Thus RC brings *intentionality* to the fore.

Traditional rhetorical criticism has been concerned with how rhetors persuade audiences with spoken or written intentional messages. However, rhetorical criticism studies now use other perspectives such as a symbolic-construction perspective which “focuses on the role of language in producing (or obstructing) human cooperation” (Livesey, 2002, p. 119). In this view, language is seen as *doing something*. Alternatively, an ideological-critical perspective of rhetorical studies has a “commitment to uncover the power relations implicit in all symbolic systems and the institutions that support them” (Livesey, 2002, p. 120).

The range of RC methods and related theory has expanded in recent decades to include non-intentional and non-specific uses of influence under the rubric of *identification* (Burke, 1950/1969). A post-Aristotelian rhetoric involves accounting for the “suasory” dimension of language as well as other symbols in all their message forms, ambiguities, and contexts (Cheney, 2004; Cheney, Garvin-Doxas, & Torrens, 1999; Cheney, Christiansen, Conrad, et al., 2004). From a contemporary standpoint, rhetorical analysis is less tied to intention, to discrete messages, and to clearly defined audiences, and more concerned with *identification*.

As discussed in Chapter 5, the concepts of identity and identification are inter-connected and multifaceted. Identity concerns distinctiveness and sameness, expressions of individual self, and alignments with different groups (Cheney, 1991) including cultural, professional, community, ethnic, and class, among many others. “Identity, in short, is a term that is commonly used to represent an individual or group; identification is the process by which identity is ‘appropriated’” (Cheney, 1991, p. 19). That is, identification is the process by which individuals and organisations simultaneously (a) make claims about self conceptions; (b) identify with (significant) others’ identity claims; and (c) invite (significant) others to identify with and ratify self identity claims (Cheney, Christensen, Zorn et al., 2004).

With regard to organisations, Burke (1937/1984) wrote, “it is *natural* for a man [*sic*] to identify himself with the business corporation he serves” (p. 264, original emphasis). No one has identity separate from society (Burke, 1950/1969) and this assumes that individual identity relates somehow to the larger social orders (Cheney 1991). “The so-called ‘I’ is merely a unique combination of partially conflicting ‘corporate we’s’” (Burke, 1937/1984, p. 264) as individuals try to simultaneously distinguish themselves from and connect with others in multiple settings – including organisations. With respect to organisations “collective identity refers to

expressed, shared interests: individuals draw on such symbolic resources as they seek to belong – to identify – as a way of coping with the divisions within society and their own search for meanings” (Henderson, Weaver, & Cheney, 2007, p. 13). This view of identification is consistent with arguments that organisations have come to play an increasingly important role in Western society (Deetz, 1992; Galbraith, 1978).

Burke’s (1973) concepts of “congregation” and “segregation” capture the tensions between *unique* and *collective* identity. Within organisations, communication is about managing the relationship between these two processes and achieving “consubstantiality” with the audience. “To identify A with B is to make A ‘consubstantial’” (Burke, 1950/1969, p. 21); that is, the speaker and audience share substance with each other. Thus, the terms “consustantiality” and “identification” are interchangeable. In addition, the term “persuasion” is synonymous with them both for persuasion is the outcome of identification (Foss et al., 2002). As Burke writes, “You *persuade* a man [*sic*] only insofar as you can talk his language by speech, gesture, tonality, order, image, attitude, idea, *identifying* your ways with his” (Burke, 1950/1969, p. 55, emphasis added). It should be pointed out here that identification and persuasion are not necessarily *absolute* states. Employees for example, will vary in the degree to which they identify with an organisation’s goals (Galbraith, 1978). In part, this may be because “Identity involves ‘change of identity’ insofar as any given structure of society calls forth conflict among our ‘corporate we’s’” (Burke, 1937/1984, p. 268-269). Thus, at any given moment or situation, individuals may prioritise one other identity claims over other.

In sum, identification has a powerful role in every-day activities, the identities, and success of organisations and their members (Meisenbach & McMillan, 2006). For organisations, the “the ongoing rhetorical struggle . . . is to establish a clearly distinctive identity and at the same time connect with more general concerns so as to be maximally persuasive and effective” (Cheney & Christensen, 2001, p. 233). In this

respect, RC analysis examines the ways in which organisations facilitate these identity and identification processes in formal communication and every-day organisational messages with various organisational stakeholders.

Formal communication and every-day messages in organisations are located in a range of texts (e.g., spoken and written), formats (e.g., visual and auditory), and locations (e.g., “inside” and “outside”). These texts constitute the units of analysis. Within these units, artefacts for rhetorically informed text analysis include the structure and form of the text, the use of metaphor, “the company a word keeps” (Cheney & Tompkins, 1988; also see Foss, 2004), beginnings and ends of sections, titles and subtitles of text, which often summarise key ideas and discourses in use (Cheney & Tompkins, 1988). For instance, identifying metaphors of traditional retirement (e.g., “retire” and “golden years”) helps to reveal discourses in use (e.g., ageing as decline or withdrawal). RC analysis highlights the ways in which specific terms within organisational messages are linked to certain discourses and not others. In this way RC illuminates various dimensions of identification including target and implied audiences, organisational values, and ideologies in use.

Common Ground

Even though CDA is primarily concerned with power, RC also shares an interest in power relations. Links have been made between Gramsci’s hegemony and Kenneth Burke’s conception of societal power relations (Cheney et al., 1999; Tompkins, 1985). As stated above, hegemony is defined as non-coercive relations that are accepted by, but do not necessarily serve the interests of subordinated groups (Mumby, 1997b). Burke’s use of the word hegemony is consistent with this definition where he uses it to refer to “the kind of dominance that infuses culture in such a way as to give a taken-for-granted quality to the relations of power” (Cheney et al., 1999, p. 142). Moreover, Lukes’ (1974) three-

dimensional model of power supports the idea of power as relational in that it emphasises “(1) institutional forces and social arrangements that (2) subtly and often unapparently act to (3) create an image of consensus” (Tompkins & Cheney, 1985, p. 186). Thus, power is a function of relations, and for both CDA and RC texts are expressions of those relations. As Cheney with Lair (2005) states, “To consider the workings of power and authority is also to move into the realm of rhetoric: that is, any situation or context where persuasion and identification can help to bring about one outcome rather than another” (p. 76).

Although more interdisciplinarity and diversity has been advocated (van Dijk, 1985, 2001b; Weiss & Wodak, 2002), there are only a few studies that use both RC and CDA (Henderson, 2005; Henderson, Weaver, & Cheney, 2007; Heracleous & Barrett, 2001; Heracleous, 2006; Livesey, 2002). Traditionally speaking RC focuses on the purposive use of language (Livesey, 2002; Rybacki & Rybacki, 1991) which includes intended and unintended messages (Foss, 2004). CDA aims to uncover structures (discourses) that transcend individual texts and infuse communication activities as a whole (Heracleous & Barrett, 2001). Key features of studies that use a combination of RC and CDA are outlined below.

In her study of corporate advertorials designed to influence a particular target audience, Livesey (2002) argues for use of both RC and CDA. She states that RC’s focus on details and functions of language provide useful “exemplars” for CDA. In addition, Livesey argues that the distinct micro-level emphasis of RC combined with the macro-level focus of CDA offer complementary tools to the communication researcher (p. 142).

Heracleous and Barrett (2001) also explore relationships between individual interpretations and communicative actions and discourse, this time within the context of shaping organizational change. In this study discourse is conceptualised as “constituted by two dynamically

interrelated levels: the surface level of communicative actions and the deeper level of discursive structures, recursively linked through the modality of actors' interpretive schemes" (p. 758). Surface level communicative actions were identified in the everyday talk and text of organisational members, while the "deep structures" referred to those "persistent features of discourse that transcend individual . . . communicative action as a whole and over the long term" (p. 758). In their analyses within and across texts, Heracleous and Barrett examined formal organisational communication (e.g., market publications, media reports, strategy documents) as well as interview transcripts and transcribed ethnographic observations.

Similarly, Heracleous (2006) develops a discourse analysis approach informed by rhetoric and interpretivism to examine rhetorical strategies used both consciously and unconsciously by organisation actors during change. He treats texts as "collections of communicative actions fixed in writing" (p. 1064) which includes documents, interview transcripts and observations recorded as texts.

Following Heracleous and Barrett (2001), Henderson et al. (2007) used RC and CDA to analyse public documents about genetic modification from two industry perspectives. At the level of the text, they paid attention to *rhetorical* features including what was highlighted, absent, and assumed. They also analysed the messages in terms of *discursive* practice (i.e., production, consumption, and distribution of the texts) and *social* practice where they noted things that were "ambivalent, hesitant, not stated, implicit, hedged around, or paradoxical that might indicate particular tensions in the communication" (p. 17). Their study showed how industry messages rely on rhetorical strategies and draw on "normalised" economic and neoliberal discourses (p. 19) to induce stakeholder identification and influence a range of social groups. In the larger study (from which Henderson et al. is drawn), Henderson (2005) includes employee interviews and focus groups in her analysis.

The analysis for my study used a combination of rhetorical criticism and critical discourse analysis, similar to the approaches used by Henderson (2005), Henderson, et al. (2007), Heracleous (2006), and Heracleous and Barrett (2001). Although my study is also consistent with Livesey (2002) the texts of my study include interview and focus group transcripts in addition to publicly available texts. The analysis focused on the levels of text and social practice (Fairclough 1989, 1992; van Dijk, 2001b, 2004), and used Burke's (1945/1969) theory and method of index (see Cheney & Tompkins, 1988) and cluster analysis (Foss, 1996, 2004) for close textual examination (these methods are discussed in the Data Analysis section later this chapter). The analysis was applied to organisational promotional documents, employee interviews, and resident focus-group transcripts.

Research Design

Rationale for Case Study Approach

Case study research focuses on contemporary social phenomena and stresses the interconnectedness between a case and its context (Patton, 2002; Stake, 1995, 2005; Yin, 2003). That is, a case study approach investigates an identifiable situation embedded in a broader and identifiable context. In this way then, a case study approach explores a current situation, event, or circumstance in its wholeness and in its individual working parts, within a broader and related context.

In this study, the specific social phenomena under examination are communication strategies of retirement village organisations and responses of their intended audiences. The broader context concerns the growing trend in the marketisation of retirement and specifically, the developing trend of retirement villages in New Zealand.

Types of Case Study

Cases are selected because they are “information rich” (Patton, 2002, p. 40) in respect of studying the social phenomenon at hand. The research purpose guides selection of the cases and is known as purposeful or judgment sampling (Bernard, 2000; Patton, 2002). However, while the social phenomenon is the *reason* for a case study, a case study approach may be used for different *purposes*. For instance, one central purpose of case study may be to gain insight into, rather than to generalise from, a specific case (Patton, 2002; Stake, 1995, 2005).

Stake (1995, 2005) identifies three different categories of case study: *intrinsic*, *instrumental*, and *collective*. The *intrinsic* case focuses on exploring the *emic* (actor oriented) concerns of the participants within a unique situation, incident or group. Thus, an intrinsic single case study is pre-selected because the nature of the case is the reason for choosing to examine it. The *instrumental* case study provides insight into an issue or refinement of theory and thus foregrounds the issue, rather than the case. This means that a case study’s capacity to explore an issue in some way comes before its intrinsic qualities in terms of the enquiry. The *collective* case study involves a number of instrumental cases which focus on some feature which is related to all. Multiple instrumental cases may be chosen for reasons associated with diversity and/or for comparison.

With regard to intrinsic and instrumental case studies, Yin (2003) identifies several specific situations that warrant a case study. These include situations where the case (a) provides an opportunity to critically test existing theory; or (b) is a rare or unique circumstance; or (c) is a representative or typical case; or (d) is revelatory, in that it is “an opportunity to observe and analyse a phenomenon previously inaccessible to scientific investigation” (p. 42); or (e) has a longitudinal purpose (Yin, 2003, pp. 39-42). In effect, Yin refines the research purpose available within a given situation. Therefore, any one of these case situations may be

congruent with Stake's (1995, 2005) intrinsic or instrumental case study types.

Further, in relation to instrumental case studies, the issue is usually of greater concern to the researcher than to the actors. Thus, Stake (1995, 2005) stresses that the researcher should be open to emerging *emic* issues from within the case, in addition to her or his own *etic* (researcher oriented) issues. In summary, instrumental case studies are selected according to three criteria: the capacity to maximise learning in terms of the issue; the capacity to allow *emic* issues to emerge; and the time available and accessibility of informants.

Finally, the *collective* case study or "multisite qualitative research" (Stake, 2005, p. 461) is an instrumental case study extended to multiple cases. However, epistemological positivist and interpretive positions take different views on multiple case studies in research. Yin's (2003) positivist approach stresses the *quantitative* aspects of single versus multiple case study design. He says that single case studies risk "all eggs in one basket" (2003, p. 53) and that one advantage of multiple case studies is that it is more likely to be regarded as robust because more evidence is more compelling. Also, Yin says that a multiple case study design should be used to "either (a) predict similar results (a literal replication) or (b) predict contrasting results but for predictable reasons (a theoretical replication)" (Yin, 2003, p. 47). These reasons demonstrate the main purpose for using a case study strategy from a positivist research perspective: to explain a case in a researcher-oriented way. This is in contrast with Stake (1995, 2005) who prefers a more *qualitative* approach which is to understand a case in a participant-oriented way. The *purpose* and *issue* at the heart of the study guide the case selection process and not its capacity for replication: that is, the capacity of each case in the collective to maximise learning in terms of the issue and to allow *emic* issues to emerge. Thus, a mixed type of purposeful sampling enables

analysis of cross-case evidence (Patton, 2002; Stake, 2005; Yin, 1981, 2003). This thesis uses a case study consistent with Stake's qualitative approach.

Identification and Selection of Cases for the Study

Several criteria were applied to select case-study RVOs. Only RVOs operating villages that met the definition of "retirement village" in the Retirement Villages Act, 2003 were included in the pool of potential participating organisations. Any village that offered retirement living, and required a capital sum to be paid by residents, qualified as a potential participant.

Another criterion was identified in the literature review. RVOs tend to differentiate between *lifestyle* and *full care* (or life care) villages (Retirement Villages Association, 2004). Thus, the research required at least two case study RVOs: one that focused primarily on lifestyle and the other which emphasised its care facilities. In the end, however, this distinction did not seem to have any bearing on the results.

One further criterion was considered but discarded: to include a not-for-profit RVO. Such a case study may have provided an opportunity to compare not-for-profit organisations with market-driven, for-profit organisations. While not traditionally seen as market-driven providers, not-for-profit organisations studies could have provided a critical study (Patton, 2003; Yin, 2003): That is, a case where if the phenomenon under study is present in this kind of organisation, it will be present elsewhere. However, this option was excluded for practical reasons: (a) some major religious and welfare organisations have sold their facilities to private organisations in recent years (Collins, 2005; Presbyterian Support [Northern], 2003; Thompson, 2003; Taylor, 2005) and (b) those not-for-profit organisations big enough to be included were easily identifiable and anonymity in the research could not be guaranteed.

The remaining criteria were used to access potential case study RVOs. RVOs had to be *members* of the Retirement Villages Association

because the Association advocates for members, provides information for enquirers, and aims to promote retirement village living (Retirement Villages Association, n.d.). In addition, each RVO needed to operate *multiple sites*. This criterion ensured there would be sufficient business developments, client base, and market share to warrant formal marketing programmes and an identifiable brand. Another reason for including this criterion was that multiple sites increased the likelihood of a reasonable size in the pool of potential participants and a presence in different local communities.

The RVOs were required to operate in largely different regions, although overlap was deemed acceptable because multiple village sites were involved. These factors helped to reduce potential conflict of interest within the research project as well as protect the identity of the participating RVOs. New Zealand is a very small place (Tolich & Davidson, 1999) and the sector is very small in terms of “big players” (Retirement Villages Association, 2004).

Finally, in addition to two participating case study RVOs, publicly available promotional material from six RVOs was included in the study. I cannot declare whether this sample of six RVOs included the two participant RVOs or not, for to do so (either way) would effectively identify them.

Sequence and Features of Cases

A pool of 10 potential participant RVOs was identified. In February 2004, I began approaching RVOs to participate in the project. The first CEO available to talk to me on the phone was invited to participate in the research. Out of the first two phone calls, I received one agreement to participate. I approached a third RVO in June 2004 and the CEO consented to participate. My strategy was to secure the involvement of one RVO before attempting to approach a second. The major benefit of this approach was that negotiations with each RVO remained focused. The

non-disclosure of the first participating RVO reduced the likelihood of negotiation being dependent on the second RVO using this factor when considering whether to participate or not.

The two participating RVOs possessed similarities and differences which can only be broadly outlined for reasons of confidentiality. In the final results I made no distinction between the RVOs because the lifestyle and life care aspects of retirement village living were not significant in terms of the participatory focus of the findings. I used pseudonyms for the participants to avoid revealing potentially identifying information.

Both RVOs were established in the 1990s and offered independent housing and apartments. The recreational facilities were extensive with each site featuring lounge areas, indoor swimming pool, gym area, library, computer room, dining facilities, and bowling green. In both organisations home support services including housekeeping and personal care were accessible through the public health system (if residents were eligible) and could also be arranged privately.

Each RVO had an executive team responsible for designated aspects of the organisation and comprised five to ten members. One RVO featured a large executive management team including separate roles for development, operations, marketing, and sales. The other had a smaller executive management team, combined roles for sales and marketing, and a small development team. Also, one RVO had separate sales staff at villages, whereas the other combined the sales role with other village roles.

At site level, the same functions were distributed among different staff, and some roles differed completely. For instance, *recreational activity coordination* was a responsibility included under *administration* for one RVO, and for the other, was included under *village coordination*. Additionally, one RVO had clinical roles, which took responsibility for rest home and hospital residents, and when needed village residents. There was no equivalent role in the other RVO.

At the time of the research, both RVOs had a number of villages in various stages of development – from “still on the drawing board” to partly completed and occupied, to completely “sold-down” with full recreational facilities available. In each case, I commenced village employee interviews and resident focus groups at the original village. In both organisations, the first village was over 5-years old and had developed beyond the initial design concept to a lived-in place. The residents were likely to be a slightly older cohort than in newer villages.

Ethical Issues: Protecting Identity in the New Zealand Context

New Zealand is a very small place with a population of 4 million, of which 450,000 are people over the age of 65-years. The retirement village sector is therefore tiny with only 3% of those people over 65-years living in a retirement village (Statistics New Zealand, 1998, 2002). These scales raised ethical concerns about the efforts needed to protect the identity of the organisations and the individual participants in the research (see Tolich & Davidson, 1999). In the light of this and the RVOs’ wish to remain anonymous, information about retirement village locations, size of operations, planned developments, and other potentially identifying data were modified, amalgamated, or not used at all. In addition, the research was potentially reliant on access to commercially sensitive information. Therefore, specific measures were adopted to protect the RVOs.

The first issue concerned each RVO knowing the other’s identity. I negotiated this with the first RVO where the CEO opted for both RVOs to know the other’s identity. I only disclosed the identity of the first RVO once the second had consented to participate. This procedure upheld the first RVO’s right to confidentiality about its participation and, as already mentioned, enabled the second RVO to evaluate the merits of participation independently.

The second issue concerned what constituted *commercially sensitive* information. This was left to each RVO to decide, and in some cases,

documents were made available as background information not for use in the thesis. The third issue concerned commercially sensitive information that if used, would identify the RVO. Such material was excluded from the thesis.

Data Gathering: Sources and Methods

Participants

Participants were identified through purposeful sampling (Bernard, 2000; Krueger, 1994; Patton, 2002): that is, by their roles within the RVO or in relation to the RVO generally. The three groups of participants identified were: RVO employees, RVO residents, and non-residents who matched the residents' profile and lived within a 20-km radius of a retirement village (see Table 5.1).

Table 5.1.

Selection Criteria for Participants

Participants	Selection criteria*
	Involved in decision-making regarding development and/or operations
Employees	Involved in marketing or communication activities Directly in contact with residents day-to-day
Residents	Lived in a village operated by one of the RVOs
	Matched residents' profile
Non-residents	Aged 55-years or over Owned home or had financial assets to support potential purchase Lived within 20-km of an existing retirement village (but not necessarily that of a participating RVO)

* Participants were not selected using criteria based on gender, ethnicity, or cultural identity.

RVO employees were selected on the basis of their involvement in organisational communication and decision-making practices (see Table 5.1). Employees included those people involved in environmental scanning, market research, internal and external communication, operations, and sales. Other employees included were those working at the villages themselves; managers, sales staff, and staff with direct resident contact (e.g., administrators, activities coordinators, and reception staff). In the broadest sense, these participants were key informants (Patton, 2002) in that they were knowledgeable about the organisation, its retirement villages, and in some cases, the retirement village sector.

Those participants in operational roles at the villages demonstrated organisational communication strategies in everyday practice. In total I interviewed 42 employees of whom 20 were senior management and 22 were based at retirement villages. Of the senior staff, seven were women and 13 were men. At the village level, 15 women and 5 men took part (see Table 5.2).

With the first RVO, I undertook 12 employee interviews prior to the first resident focus group, with remaining interviews being completed prior to the final focus group. With the second RVO I undertook eight staff interviews prior to the first resident focus group, with the remaining interviews being completed prior to the final focus group. Interviewing staff before focus groups in each organisation ensured I gained a sense of the organisation's direction. Also, this strategy enabled me to gather organisational documents for possible use in the focus groups.

Village residents were selected on the basis of purposeful or theoretically motivated sampling (Morgan, 1997; Patton, 2002). Even though older people as a population are diverse and heterogeneous (Grant, 2006), certain factors contributed to the relative homogeneity of the residents' group. These included the age range, socio-economic status, and ethnicity (although not necessarily culture).

Table 5.2.

Demographic Information: Employee Participants

Participants	Employee Roles	Number	Male	Female
Corporate and senior employees	CEO/Directors	3		
	Finance	2		
	Sales/Marketing	4		
	Development	3		
	Operations	3		
	Consultant specialists	3		
	Support staff	2		
Sub-Total		20	13	7
Village employees	Manager	6		
	Administrator/Activities coordinator	8		
	Village maintenance/Sales	5		
	Clinical staff	3		
Sub-Total		22	7	15
Total		42	20	22

Non-resident participants were selected on the basis of their match with the retirement village resident profile (see Table 5.1). That is, I attempted to match non-residents in terms of age range, socio-economic status, and proximity to a retirement village. I used the proximity factors because RVOs reported that most of their residents came from within a 20-km radius of a given village. Secondly, I anticipated that older people would know of retirement villages generally as well as those within their own locality. This view is supported by two factors: that older people are generally socialised with regard to ageing and retirement (Koopman-Boyd, 1987, 1993a), and that New Zealand is a very small place (Tolich & Davidson, 1999). Thirdly, this approach managed the potential problem of how to define “older people” or target client groups of retirement villages.

Documents

A significant part of my study involved the examination of publicly available and largely promotional material from six RVOs operating multiple sites in various New Zealand locations. As mentioned earlier, I am unable to say whether this sample of six RVOs included the two participant RVOs or not, for to do so would effectively identify them. The documents collected included promotional material, official documents, and general information available in the public domain (see Table 5.3). Target audiences for such texts included current and prospective residents, their families, and potential investors. The time period for documents ranged from 2001 to 2005, with most becoming available in October 2003 to March 2005.

Text selection: The six RVOs in this part of the study produced a range of publicly available materials including brochures, advertisements,

Table 5.3.

Documents Available to the Study

Type	Item
Promotional material	Advertisements
	Brochures
	Radio and TV advertisements
	Webpage information
Official material	Annual reports
	Newsletters
	Press releases
	Investor statements
	Prospectus documents
General material	News articles
	Industry sector information

advertorials, village newsletters, and webpage material. Texts were selected on the basis of the primary audience being potential residents. The promotional material concerned the promotion of retirement village living in conjunction with the respective RVO and/or one of its villages. The primary aim of these brochures was to promote the respective village, as well as retirement village living (in contrast to other kinds of housing).

In this respect, the key audience was potential retirement village residents: that is, people over 55-years, who had sufficient financial resources to pay a capital sum to buy a dwelling and to pay the weekly fee. However, *potential residents* as an audience could be broadly interpreted by RVOs. *Potential* could mean someone currently looking with the purpose of buying, as well as “just looking” either on behalf of others, or for future reference. Therefore, potential residents may be taken to include family members, those approaching 50-years of age, or those who knew people aged 55-years-plus. Moreover, these groups may be viewed as including potential referrals as well as potential residents, and therefore current residents could be considered part of the target audience. Finally, promotional material aimed at potential financial investors (where available) was also included as a comparison with the general promotional texts.

Three additional criteria were applied to select texts: (a) the availability of the document to members of that audience; (b) the extent to which the texts were promotional, and; (c) where multiple promotional texts were used, the degree to which one text was more comprehensive than another. Brochures were included because they were routinely sent out to people who made enquiries about a village. However, annual reports for example, were not routinely sent to enquirers and therefore were not included in the analysis.

A distinction was made between specific information and promotional materials. For example, material aimed at investors may have included an investor statement along with general financial information

(e.g., Metlifecare, Ryman Healthcare). Such financially oriented material was viewed separately from promotional material. In contrast, Vision Senior Living produced an investor *statement* as well as an investor *brochure*. The statement presented primarily financial information, while the brochure was primarily promotional. Therefore, investment statements and shareholder information were viewed as financial rather than promotional and not included in the analysis. However, advertisements and brochures promoting the organisation to (potential) investors were included where available.

Finally, RVOs produced various kinds of promotional texts including webpages. However, webpage material, in the main, was found to be similar and often identical (e.g., Primecare, Summerset Group) to the print brochures. Where this happened, the fullest and most comprehensive text was used. In nearly all cases the brochure was used over the webpage in the analysis. However, Vision Senior Living upgraded its website in 2005 and the presentation of some information differed from the both the previous webpage and the 2004 brochures. Therefore both webpage and brochures were examined for this organisation.

Interviews

Interviews with RVO employees were chosen over participant observation because both organisations were concerned about commercial safety. Interviews provided staff members with greater screening capacity than is possible with participant observation. That is, interviewees were able to avoid referring to or using confidential material.

On the face of it, interviewing enables the researcher to find out about what cannot be directly observed (Patton, 2002). However, the theory of interviews holds that through the interaction between the interviewer and interviewee, the knowledge resources of the interviewee are activated within the topical parameters of the research focus (Holstein

& Gubrium, 1995, 2003). Through a series of questions, the interviewer activates knowledge resources such as the interviewees' perceptions, experiences, opinions, and responses to the social phenomenon which is the focus of the study. Thus, interviews are meaning-making opportunities for both interviewee and interviewer (Atkinson & Coffey, 2003; Denzin & Lincoln, 2005a; Holstein & Gubrium, 2003; Patton, 2002).

Within the context of my research, the interview consisted of a series of questions about a focal topic. Interviews have been described as conversations that are "loosely directed and constrained by the interviewer's topical agenda" (Holstein & Gubrium, 1995, p. 29). Thus, questions are framing devices that the interviewee may follow. Participants were invited to talk about a number of topics including their own experiences with retirement villages, those of family members, and retirement itself, within the contextual frames of future, past and present. The semi-structured interview schedule (see Appendix 2) was designed to cater for research goals as well as for emerging issues.

Critics of this approach to interviews may for example, concern themselves with issues of contamination and researcher bias. In response, from a social constructionist position "contamination" is part and parcel of interaction, for it is through social interaction that reality is (co)constructed. Thus in the active interview, both participants are involved in making meaning (Holstein & Gubrium, 1995, 2003). Furthermore, researcher bias is a natural feature of the research process: The researcher began the study for some reason particular to him or her. Thus, it is important to see the interview as both product and process of the interaction between the participants (Atkinson & Coffey, 2003; Denzin & Lincoln, 2005a; Holstein & Gubrium, 1995, 2003; Patton, 2002).

The single biggest limitation with using interviews as data-gathering methods is the *interviewer* (Patton, 2002): That is, the degree to which an interview produces material suitable for the research depends on the quality of the interviewing (Holstein & Gubrium, 1995, 2003; Patton,

2002). First, the quality of the interview may be affected by the capacity of the interviewer to *build rapport* with regard to the person being interviewed and *remain neutral* with regard to the content (Patton, 2002). Second, if *consistency* in data gathering is a goal, then interviewing has limitations. Even with the most skilled interviewer not all the questions on a given interview schedule may be asked, or in the same order, or in the same wording (Frey, Botan, & Kreps, 2000). Thus, *quality* interviewing involves monitoring the selection of interviewees, design of the interview structure, and the process of interaction during the interview.

Initial contacts and sequence of interviews.

Once the CEOs had agreed to the RVO participating in the research, I met with the CEO and the executive management team to present the project to them and discussed three key areas. First, we addressed the scope of the project, and the parameters of RVO involvement, along with ethics, confidentiality, commercially sensitive issues, and aspects of participation. Second, we agreed on the RVO employees who were likely to be involved. Third, protocols were set as to how I was to contact residents. In both organisations I was to work through the village managers.

In the week following the management team meeting, I commenced interviews with those people who had attended. I then used networking, also called snowballing or chaining (Patton, 2002), to meet subsequent interviewees. I relied on each interviewee to introduce me to other management team members, village managers, and employees based at villages. This strategy allowed me to explain the project to potential participants and give them time to read the documentation prior to the interview.

The sequence of interviewing staff was determined a by top-down approach. I interviewed executive staff before operational staff, because I thought it was important to get a sense of the strategic organisational direction prior to interviewing people at the operational level. All

employee interviews took place between April and October 2004. Most interviews were held at the place of employment and in a room or area nominated by the interviewee. The level of privacy was determined by the interviewee with a small number of interviews taking place outside of the RVO, in a private home, café, or hotel lobby.

Structure and length of interviews.

Each interview lasted between 45 minutes and 2 hours with most being about 1 hour in length. In both RVOs a member of the executive team offered to distribute electronic copies of the information sheet, my letter, and the consent form (see Appendix 1). I began each interview by addressing the contents of these documents.

The interview schedule was semi-structured (Holstein & Gubrium, 1995; Patton, 2002) and aimed to encourage a conversational quality (Holstein & Gubrium, 1995, 2003). The interview guide took a funnel approach which began with broad, open-ended questions, and moved towards increasing specificity. This allowed interviewees to move onto different topics and in a different order from the interview guide. It also allowed them to manage meaning and interpretations, and the focus of the conversation (Holstein & Gubrium, 1995, 2003; Patton, 2002).

Questions included a range of foci such as the interviewee's experiences, values and opinions, emotional responses, and knowledge (Patton, 2002) of retirement villages and RVOs. Such questions focused on the workings of RVOs including example factors that influenced organisation decision-making; roles of marketing, public relations and advertising in retirement village organisations; what communication strategies were effective; and organisational goals.

Finally, I had follow-up sessions with the CEO of each RVO, the executive team of one RVO, and some village managers. The key purpose was clarification or feeding back early findings. Data from these sessions was included in the research. (A timeline is included in Appendix 4.)

Focus Groups

Focus groups were chosen as the data-gathering method for retirement village residents and also for non-residents who matched the resident profile (see Table 5.1). This method was chosen for several reasons. Most importantly, the focus group is a naturalistic data-gathering method which relies on “the interaction in the group to produce the data” (Morgan, 1997, p. 15). While less naturalistic than participant observation, this method of data-gathering enables the researcher to access the participants’ talk and interactions (Krueger, 1994; Morgan, 1997, 1998) which constitute a group’s shared reality (Wilkinson, 2004). That is, in the focus group processes the researcher may observe, “talk-in-interaction . . . [which] is bound up with people’s lives - their projects, their developing identities, their evaluations” (Puchta & Potter, 2004, p. 2). Thus, focus groups as a form of data-gathering are “‘naturalistic’ insofar as they mirror the processes of communication in everyday social interaction” (Wilkinson, 2004, p. 277). This approach is consistent with social constructionist foundations of this research.

Although focus groups are often used as an efficient way to collect greater amounts of data in relatively a short space of time (Krueger, 1994; Morgan, 1997, 1998), their real value is in allowing the researcher to “*experience the experiencing*” of participants (Puchta & Potter, 2004, p. 8, original emphasis). Through participants sharing and comparing everyday experiences, observations and viewpoints, and developing themes in depth, focus groups provide the opportunity to increase the meaningfulness of findings (Krueger, 1994; Morgan, 1997; Patton, 2002; Wilkinson, 2004). However, Puchta and Potter (2004) note that “[w]ith rare exceptions, opinions and views are treated as good contributions to focus groups, and stories or personal narratives are not” (p. 18). In respect of my thesis, participant stories were important in that they usually related to experiences. Therefore, to facilitate the sharing of stories and interaction in

the focus groups I paid particular attention to questioning format and my own conduct in the focus groups.

Research using focus groups traditionally favours participants who are “homogenous strangers” (Morgan, 1997, p. 34) because it minimises the risks of acquainted group members such as unspoken assumptions which the researcher may miss, and unspoken agreements about what not to talk about. However, participants who know each other help to create the naturalistic qualities of focus groups because participants “may recall common experiences, share half-forgotten memories or challenge each other on contradictions between what they are professing to believe in a group and what they might have said or done outside the group” (Wilkinson, 2004, p. 276). Members who know each other are also appropriate for situations where the researcher is trying to aspects of the context under research (Morgan, 1998). Therefore, focus groups may draw on naturally occurring groups such as friendships, work groups, club members, and families, as well as groups of individual strangers who have had similar problems or experiences (Wilkinson, 2004). In my research, the nature of the village environment retirement meant that all focus group participants knew each other at least by name and in some situations were also good friends. In the non-resident focus groups most participants knew each other through club connections and/or the contact person. Only a few participants in the non-residents’ focus groups had not met before.

Familiarity among focus group participants does have implications for the moderator’s role (Krueger, 1994, 1998b; Morgan, 1997; Puchta & Potter, 2004). By using different communication tools such as playing devils advocate or naïve questioner the moderator can probe generalisations, unspoken assumptions, and apparent consensus among participants who know each other (Morgan, 1997; Krueger, 1998b). In my research, such tools were particularly useful when participants (residents and non-residents) talked about retirement villages, ageing, retirement

and community. However, such tools may also be applicable to focus groups where members are strangers. In short, the specific activities of the moderator, the degree of moderator involvement, and the extent to which the topic guide is structured or unstructured all influence participant contributions and their interaction. The focus group moderator needs to probe in order to generate participant responses that are specific in detail and depth, as well as facilitate and respond to emerging issues raised by participants (Krueger, 1994, 1998a; Morgan, 1997, 1998; Puchta & Potter, 2004; Wilkinson, 2004). In this way then, participants and the researcher engage in a group experience.

Although much is said about confidentiality in focus groups, I experienced and had to address some real limitations of confidentiality. Most crucial to address at the beginning of each focus group was how I would use information and report back to the participating RVOs and participants. I also explained to participants that one aspect of each RVO consenting to the research was that I would report any issues related to resident safety (financial or personal) that I encountered. Finally, I discussed with participants (also mentioned in the letter) the ethical concern about what residents could do with what is *said* in the group (Krueger, 1994; Morgan, 1997). The ground rule was *what we say in the group stays in the group* and we discussed what this meant for each participant individually. However, I experienced the real consequences of participants not fully understanding this concept. After one focus group where the village van had been a topic of conversation, the participants (in my presence) asked the village manager if there was a photograph of the van that they could give to me. Subsequently, when I interviewed the corporate sales/marketing manager some months later, the residents' van was the opening topic.

In order to address possible reluctance to take part in the group discussion at any point, and to assist with any emergent issues for individual participants, I invited participants to contact me if they wanted

to discuss anything further and offered after-focus group interviews to those who wanted them. With regard to the residents' focus groups seven residents accepted this offer. These offers also resulted in my being invited by both staff and residents to use the village restaurant/café, staff lunchroom, any casual seating, and the outdoor gardens. A number of focus group participants approached me informally during these times. In addition, on four separate occasions I was invited by both focus group participants and village managers to attend various meetings (e.g., six-monthly Residents' Committee meeting with management which was attended by nearly all residents; weekly meeting between manager and residents; and a village residents' monthly meeting).

Structure and length of focus groups.

Each focus group lasted between 1 hr 30 min and 2 hours. I began each focus group with introducing myself, and then answering questions about participation, the information sheets, my letter, and the consent form (see Appendix 3). This usually took about 10 minutes, because in most cases, participants had read one or both of the information documents. Once participants introduced themselves, I made a point of saying that I was learning from them. This ensured that I could intervene more or less in response as the direction and content of the group discussion required (Morgan, 1997).

The focus groups were semi-structured and conversational in tone. I developed a question guide (see Appendix 3) with eight broad topic questions. For each topic I developed potential probing or clarifying questions (Krueger, 1994, 1998a; Morgan, 1997; Patton, 2002). As with the RVO employee interviews, I used a funnel approach to the focus groups, which began with broad, open-ended topics and questions, and moved towards increasing specificity (Morgan, 1997). Although not as open-ended as a totally unstructured schedule, the focus groups were conversational in that I would take my cue for the next topic from the

group. I tried to ensure that each topic was addressed in each group, by checking each item off as we went.

As with the interviews, the focus group questions encouraged a range of answering options (Patton, 2002). These included individual narratives, reported experiences, views and opinions, emotional responses, and knowledge of retirement villages and retirement village organisations. The question guide differed slightly between retirement village residents and locality-based participants, although the topic areas themselves remained consistent.

Resident focus groups.

All resident focus groups took place between June and October 2004. They were held in a private room, on site at the village of residence and as with the employee interviews and non-resident focus groups, were recorded on a digital recorder and transcribed by confidential transcription service.

Number: In total, 57 residents participated in eight resident focus groups, at six villages (see Table 5.4). The gender mix of the focus groups did not quite match that of retirement villages generally where two-thirds of residents are women (Bell & Associates, 2003; Davey et al., 2004).

Table 5.4.

Demographic Information: Focus Group Participants

Type of focus group	Number of focus groups	Number of participants	Age		Gender	
			Range	Most	Male	Female
Residents	8	57	55-87	64-79	23	34
Non-residents	6	37	54-79	65-75	10	27
Total	14	94			43	61

Composition: The number of groups and number of participants in each group were determined by the characteristics of each population

(village residents and non-residents) as well as the variability of the participants within and across the groups (Krueger, 1994; Morgan, 1997). As a general rule the greater the heterogeneity within groups, the greater the need for more groups, and across groups, the more distinct populations being compared, the greater the number of focus groups to be held (Krueger, 1994; Morgan, 1997). Retirement village residents were viewed as having greater homogeneity in that they were all over 55-years, and all had chosen retirement village residence.

I originally proposed to hold about three focus groups per RVO (one for each participating village). However, in two participating villages, two focus groups were held because of resident interest in the project at those particular villages (see Table 5.3).

Recruitment: Each resident focus group involved between 4 and 10 participants, with the majority of groups having 6 or 7 participants. The participants were largely self-selecting and this would have influenced the numbers attending (Morgan, 1997). At one village the manager selected participants for their “range of opinions”. At all other villages, residents were invited to attend by a notice on a notice board, and/or individual letter (see Appendix 3). These recruitment strategies were used at the suggestion from the village managers.

For most of the focus groups, I worked through the manager or a delegated staff member. While I also knew that technically I could have approached the residents independently of the organisation, I was aware that I needed to maintain good working relationships with RVO management and village employees. Therefore, I based my recruitment strategy on the assumption that the manager was the point of entry to each village (a strategy supported by each CEO). The primary purpose was to help me access potential participants; however it also seemed to communicate RVO approval for the research. This had flow-on effects in that one of the first questions in five residents’ focus groups concerned my relationship with the RVO and how the research was being funded.

Residents at two villages were unique in their responses to the notices. I received a phone call on my mobile phone from one resident spokesperson who was calling on behalf of other residents after they had read the notice about the focus group. He asked if I could attend their regular monthly meeting in the morning and move my focus group to the afternoon. I agreed immediately saying that residents' commitments came first. He then went to explain that the residents' did not like arrangements being made for them by the village management. Over 30 people attended that particular residents' meeting. At another village, three focus group participants told me afterwards that they had decided to attend once they saw the list of people already registered: they wanted to make sure that "balanced views were heard".

Non-resident focus groups.

All non-resident focus groups took place between October 2004 and March 2005. They were held either at the clubrooms of the focus group coordinator, or in the home of one of the participants.

Number: In total, 37 people participated in six non-resident focus groups (see Table 5.4). All matched the retirement village resident profile except two: one participant was (just) under the age of 55-years, and another rented a home. The men-women ratio of non-resident focus groups occurred naturally and was not planned.

Composition: Non-resident focus groups were established in line with the residents' focus groups: that is, between four and ten participants aged 55 and over. The non-resident groups were more heterogeneous in that their living arrangements ranged widely. Therefore, a greater number of focus groups were warranted than those held with each RVO (Krueger, 1994; Morgan, 1997). However, recruitment issues had a significant bearing on the size and number of non-resident focus groups.

Recruitment: Non-resident focus groups involved recruiting participants for whom the research topic was of little interest and therefore recruiting was difficult (see Krueger, 1994; Morgan, 1997).

Initially, I tried contacting potential participants through community groups and clubs where retirement villages advertised: for example, bowling clubs, garden clubs, Age Concern, 60-plus, Returned Services Association (RSA), and so on. However, this strategy proved largely unsuccessful, with only one of six approaches resulting in a focus group. Therefore I changed the recruitment strategy.

I moved to using personal networks to locate participants (Frey et al., 2000) and asked people if they knew of anyone over 55-years in other regions. I then arranged for a key contact person to coordinate the group. Finally, I offered small incentives. In all instances I provided refreshments for participants, and offered to donate items for club raffles (e.g., hamper of assorted confectionary items). All six focus groups were held within a 10-km radius of a retirement village in Auckland, Waikato, and Wellington regions. A further two focus groups were planned, but were cancelled because of sudden change in circumstances. By March 2005, time frames for completion had become an issue, so efforts to set up more non-resident focus groups were abandoned.

Finally, the avenues used for contacting participants may have affected the sample in some way. Contacting people through age-related community groups and personal contacts may have excluded participants who fitted the retirement village resident profile but were not active in the arenas of recruiting (Krueger, 1994; Morgan, 1997; Patton, 2002).

Data Analysis Methods

In this study I used a combination of rhetorical criticism and critical discourse analysis, similar to the approaches used by Henderson, et al. (2007), Henderson (2005), and Heracleous and Barrett (2001). In terms of CDA, my analysis used the methods of Fairclough (1989, 1992) and van Dijk (2001b, 2004), and focused on the levels of text, discourse, and social practice. In terms of RC, I applied Burke's (1945/1969) theory and method

of index (Cheney & Tompkins, 1988) and cluster analysis (Foss, 1996, 2004) for close textual examination.

All transcripts and documents gathered in the study were subjected to multiple readings to identify recurring terms, ideas, and emergent themes (Foss, 1996, 2004). This process also facilitated the identification of critical incidents: events that (a) have immediate effects, but whose full meaning only becomes clear on reflection and evaluation; and/or (b) maybe minor, but are symbolically important and representative of a bigger issue or problem (Patton, 2002). I used a computer programme *HiLighter* (Orgad, 2002) to undertake initial key-word searches, to identify recurring terms, and for proximity searches to assist with cluster analysis. In addition, I used the "long table approach" (Krueger, 1998b, p. 57) which involved coding transcripts by hand using coloured marker pens, and cutting and collating transcript excerpts according to the various topics and emerging themes.

Tools of Text Analysis

Critics can gain insight into rhetors' worldviews by analysing the "terministic screens" (Burke, 1966b; Foss, 2004; Livesey, 2002) in language use. These are "filters or blinkers inherent in any term or set of interpretive vocabularies" (Livesey, 2002, p. 121). Burke uses the photograph metaphor to explain: "something so 'factual' as a photograph reveal[s] notable distinctions in texture, and even in form, depending upon which color filter [is] used" (1966b, p. 45). Within the context of talk and text, word choice is the filter which influences the "factual" message. Thus, by observing the implicit use of particular terminology in a particular situation, the fields, values, ideologies, and discourses will be revealed. *Cluster* criticism involves identifying key symbols in rhetorical artifacts and analysing the words and images that cluster around those key symbols. Within such "associational clusters" the researcher looks for "what goes with what" (Burke, 1941/1973, p. 20); for example "what kinds

of acts and images and personalities and situations go with [the rhetor's] notions of heroism, villainy, consolation, despair" (p. 20). Thus, by commenting on "the company [a word] keeps" (Burke, 1941/1973. p. 35) we may infer another level of meaning (Cheney & Tompkins, 1988).

A cluster analysis begins with identifying key terms or themes using the criteria of high frequency and high intensity. Terms used repeatedly and terms that may not feature often, but are striking in some way are selected. The second part of cluster analysis is agon analysis in which "the critic discovers what terms oppose or contradict other terms in the rhetoric" (Foss, 1996, p. 369). The researcher examines the context in which the key terms are located looking for terms and ideas that are in opposition to the key terms.

Cluster analysis lends itself to deductive analysis in that the symbols and subjects are identified in advance. In my research, such subject groups identified in advance included "retirement", "ageing", and "lifestyle". With an inductive approach, the subjects emerge from the data. In my research these included "active", "leisure", "resort", and "secure" lifestyles.

Fundamental to the theory and method of the text indexing is the "fact" that "there is no other way to treat 'the surroundings' or the 'referents' of a body of discourse but to describe it with other symbols" (Cheney & Tompkins, 1988, p. 465). The text, by the nature of the arrangement of words, is a "factual territory from which one makes a map through inference" (Cheney & Tompkins, 1988, p. 466). Thus, to make inferences is to "move beyond a 'low' and unquestioned order of observations to a new or 'higher' order of observations, with the latter of course emerging as another text" (Cheney & Tompkins, 1988, p. 467).

The method of indexing examines texts in systematic ways (Cheney & Tompkins, 1988). These include, noticing word choices, the prevalence of certain metaphors, and the co-occurrence of certain symbols. It means looking for and isolating different and/or recurring associations between

terms of a text. The process also involves noting a rhetor's use of passive and active voice (e.g., to what extent is the rhetor identifiable) and patterns of word use (e.g., the use of hyperbole, superlatives, or tone of adjectival phrases). At the level of inference, implications can be drawn from the "radiations" of a term (Cheney & Tompkins, 1988, p. 466). For example, the term "care" radiates terms such as "service", "concern", and "help", well as the opposite "helpless".

Of critical importance when using the indexing method is to ensure the use of two types of "proofs" (Cheney & Tompkins, 1988, p. 467).

First, "while grounding itself in reference to the textual 'facts,' it must seek to make clear all elements of inference or interpretation it adds to these facts; and [second,] it must offer a rationale for its selections and interpretations". (Burke, cited in Cheney & Tompkins, 1988, p. 467).

Therefore, it is not enough to identify and comment on facts of a text, the researcher must locate his or her comments within a clearly articulated rationale. Table 5.5 lists specific facts to select from texts.

Consistent with my critical-interpretive approach, I used both inductive and deductive methods. From an *inductive, interpretive position* I paid close attention to the language, issues, and the themes arising out of participants' stories and experiences, and RVOs' texts and practices. This inductive approach required me to remain open to the emergence of unexpected categories of analysis (Denzin & Lincoln, 2005b; Patton, 2002). From a *deductive and critical position*, I analysed participant and RVO texts with a view to explicating assumed or stated values, ideologies, and discourses. In this regard I prepared a list of *a priori* of discourses, practices related to market and medical models that I expected to encounter. Different analysis tools were applied to ensure the requirements of each strategy were met. These are discussed below.

Table 5.5

<i>Facts for Selection from Texts</i>	
Fact	Description
Key terms	Especially where they recur in different contexts.
Synonyms	Terms with the same operational meaning as others in the text.
Names and titles	Act as condensed symbols for the essences of things they tell us who people are, and how we should act towards them.
Beginnings and ends of sections	These have the same effect as names and titles and include titles and subtitles of text and its sections.
Terms of "scene"	Help to place elements of the text and reveal something about the developments of the discourse
Novel or striking terms	For acts, attitudes, ideas, images, & relationships
Term(s) at the mathematical centre	These are often revealing as points in the discursive progression
Oppositions	"What is posed against what" may suggest "dialectical synthesis"
Ambiguities	When "one key term is used to cover two seemingly diverse situations" (Burke, 1945/1969)
Metaphors	Something used to talk about something else
Shape and style	Stylistic continuity and break points, along with terms that contribute to the shape of internal forms
Absence	The absence of key terms in particular sections often signals something important, as when silence in interaction must be labelled.

(adapted from Cheney & Tompkins, 1988, p. 467-468)

Procedures

The text corpus of promotional material, employee interview transcripts, and resident and non-resident focus group transcripts, was subjected to multiple readings. However, as van Dijk (2001b) writes, "complete discourse analysis of a large corpus of text or talk, is . . . completely out of the question . . . we must make choices, and select those structures for closer analysis that are relevant for the study of a social

issue" (p. 99). The multiple forms of data employed in this study, and the sheer volume of it, resulted in broad-ranging characterisations of rhetoric and discourse. However, from the documents and interviews, I singled out noteworthy trends, striking absences, and specific textual passages that revealed significant issues. I applied analysis to local-micro-text, organisation-meso-discourse, and global-macro-social practice levels (Fairclough, 1992; van Dijk, 2001b, 2004).

At the *level of the text in the promotional material* I looked for ways in which particular words were used (e.g., "retirement"), absent terms (e.g., "age" and "old"), and recurring terms (e.g., "leisure", "lifestyle", and "choice"). I also paid particular attention to the use of images in relation to texts (e.g., images of older people in leisure activities compared with textual descriptions).

At the *level of the text within promotional material, interviews, and focus groups*, I paid particular attention to the beginnings, centres, and endings of sections; metaphors; novel or striking terms or phrases; synonyms; the radiations of terms; and clusters of key and emerging terms and themes. I also considered stylistic aspects of the spoken and written texts such as active and passive voice; syntax; adverbial and adjectival phrases; the presence and absence of pronouns; alliteration and assonance; repetition; antithesis; hyperbole; synecdoche; and apostrophe or break points (stalling, changing word use).

At the *level of the text within interviews and focus groups*, I also paid attention to representations of village life, retirement villages, the RVO in particular and RVOs in general, and people aged 55-plus. With respect to the focus of study, I also noted what participants considered to be communication within the RVO; their interpretations of organisational communication; and communication between the RVO and residents. With *resident focus groups*, I highlighted the ways in which participants talked about RVO advertising, internal communication, and

representations of older people, retirement, and retirement village living, and the RVOs themselves.

At the *discursive level* I paid attention to the texts' preferred readings (Foss, 2004; Hall, 1993; Locke, 2004). For example, with the promotional material, I noted stylistic issues; the use of discursive strategies such as enhancement, denial, and self-promotion; and identified ways in which individuals and written texts and images drew on market, medical, ageing, and retirement discourses.

With *interview and focus group* texts, I noted intended audiences (including me as researcher) and the rhetor's position (e.g., status within organisation). With the focus groups, I paid attention to the roles participants held, both formally within the village as well as informal roles within the group on the day. For instance, one resident who held a formal role within the village also "held the floor" for the short time he attended a focus group. However, once he left, the other participants relaxed and talked more openly. In another, one resident seemed to facilitate discussion by asking other residents direct, open-ended questions.

At the level of *social practice* I noted textual features that suggested underlying assumptions, values, discourses, and ideologies. For example, the promotional material drew on active and positive ageing discourses to promote RVO products, as well as traditional and negative discourses of ageing. In this way RVOs could be seen to draw on and influence readers' mental models of retirement villages and ageing.

I systematically recorded the identified features (with specific excerpts) from the documents, interviews, and focus groups (see Appendix 5 for samples). I then proceeded to map connections and note contradictions, convergence and divergence between the different participant groups and documents, issues, values, and practices. As a result I identified one meta-theme of *resident participation*. Within this meta-theme I identified four contributing themes: (a) *RVO representations* of resident participation in retirement villages; (b) contested views on

community and participation; (c) *managed* residents' participation; and (d) *transformation* in RVOs resulting from residents' participation.

Summary and Conclusion

This chapter has explained the social constructionist epistemological foundations and theoretical positions that informed the research design. In order to facilitate a balance of keeping attuned to participants, while remaining sensitive to organisational and social contexts I adopted a *bricolage* of theoretical approaches and procedural methods for the study. The central benefit of a critical-interpretive position is that it has enabled me to focus on the individual lived experiences as well as communication structures and processes of organisational life. I was thus able to approach the social and organisational phenomenon of retirement villages at individual-micro, organisational-meso, and societal-macro levels.

The chapter has also detailed the procedures for case study selection, data collection, and data analysis. The latter was informed by rhetorical criticism and critical discourse analysis. This combined approach enabled me to focus on language-use of participants as well as in documents, and to examine structures or discourses that transcend individual texts and infuse RVO communication activities as a whole.

The four analysis chapters that follow are organised around four themes emerging from the data analysis: Representation, community, participation, and transformation. Chapter 6 explores RVO representations of retirement villages, residents, and themselves in promotional material. It considers the implications such representations have for residents' participation and RVO roles in residents' participation. Chapter 7 centres on various interpretations of community by the different participant groups and the infusion of ageing-as-decline discourse in the identity claims of both residents and non-residents of retirement villages. It also highlights the implications of ownership felt by residents and

employees of retirement villages. The final two chapters focus on participation. Chapter 8 explores the different domains and the accepted limits of residents' participation. It highlights the real influence of employee and residents' actions as well as organisational structures and processes on participation. Finally, in Chapter 9 resident motivation and employee control are examined in the context of contested domains of participation. This chapter highlights the *accepted* power of RVOs and their employees and the *potential* power of residents in the day-to-day interaction at retirement villages.

CHAPTER 6

PROMOTION: REPRESENTATIONS OF RETIREMENT, RESIDENTS, & RVOS

Introduction

One of the original research questions for this study concerned RVOs' representations of older people, retirement, and themselves in their promotional communication. As explained in Chapter 5 this question developed a participative angle during the research to become more specifically focused on *RVO representations of retirement village living and implications for resident participation*. Therefore, the purpose of this chapter is to explore promotional messages of RVOs as "scene" for residents' participation. That is, the chapter examines the features of the RVO promotional messages as the potentially influential setting in which action takes place between an actor (or agent) and others as co-agents and counter-agents (Burke, 1945/1969). Scene is not simply the backdrop to actors and action; its designation can help to frame "the scope or circumference of the analysis" (Foss, Foss, & Trapp, 2002, p. 201). The nature of a given scene primes an audience for subsequent events and analysis because "the presence of one quality prepares us for the introduction of another" (Burke, 1966a, p. 124–25). Thus, promotional messages prepare the ground for subsequent messages and create expectations about the domains and forms of resident participation.

Organisational statements and representations made public through media delivery systems and spokespersons (Cralle, 1990) often result from decisions made behind closed doors (McMillan, 1987). Three different senses of "representation" may be applied within the context of organisations: (a) the "inner experience" of organisational images and their audiences as generated by organisations, as well as those that individuals generate of themselves and organisations; (b) the "public

image set forth by organizations” (Crabbe, 1990, p. 123, original emphasis) by which the public creates its own private images; and (c) “Representations as ‘magic’” where

[a]s the audience of magicians, we look where we have been directed and see what we have been told to see: The magic is not that we see things “appear” and “disappear;” the magic is that we fail to see what is really occurring. (Crabbe, 1990, p. 123)

In accepting the organisation’s preferred readings (Foss, 2004; Hall, 1993, Locke, 2004), and thus, failing to see what is really occurring, audiences do not act as they may do if they could see through such representations.

All three senses of representation highlight the interconnectedness between identity and identification in relation to organisation and individuals/audience. The third sense, however suggests that examining organisational representations in the public domain will reveal rhetorical processes used by organisations. In this respect, promotional messages from RVOs about themselves, their products and services can be understood as rhetorical artefacts. Moreover, examination of these messages will reveal implied as well as explicitly stated organisational values, discourses, and assumptions as identity-claiming and identification-inducing vehicles. Therefore, the focus in this chapter is twofold: RVO representations of retirement village living and the RVOs themselves. Such representations form guidelines for individual and collective interpretation and practice of actors – residents and employees – within RVOs.

The data was drawn from rhetorical and critical discourse analysis of promotional material from six RVOs operating multiple sites across various New Zealand locations. The initial analysis focused on a sample of 11 documents including six corporate brochures, five village brochures, and one investment brochure (see Table 6.1). (The investment brochure was selected because it was corporate in nature and clearly promotional.) However, within a “family” of an RVO’s promotional material (i.e.,

Table 6.1.

Lifestyle Themes in RVO Promotional Brochures

			1. Active lifestyle		2. Leisure lifestyle		3. Resort lifestyle		4. Secure lifestyle	
			Text	Images	Text	Images	Text	Images	Text	Images
Guardian Healthcare	Village	16		1	5	3	5	12	5	1
Metlifecare	Corporate	16	1	2	3	5	4	7	14	
Metlifecare	Village	2			2	2	4	6		
Primecare	Overview	8		13	2	6	11	13	3	
Primecare	Village	8	1	2	3	4	7	9	1	1
Ryman Healthcare	Corporate	17		1		3	4	6	4	
Ryman Healthcare	Village	4		2	1	2	2	1		
Summerset Group	Corporate	4		3	1	6	2		2	
Summerset Group	Village	1		2	2	2	2		1	
Vision Senior Living	Corporate/ Investor	8				8	11	32		
Vision Senior Living	Village	8	1	2	5	11	13	11	4	
Total		92	3	29	19	51	66	97	42	2

corporate and village brochures, webpages, print advertisements, village newsletters), there was often similarity in information, text, and images, as well as occasional differences. Therefore, the analysis was expanded to include these “families” of promotional material for each of the six RVOs.

The chapter is presented in four sections. The *first* section explores representations of retirement village living, including key terms such as age, retirement, and lifestyle. The *second* section turns to representations of retirement lifestyles, which include active and more traditional “retreatist” leisure, resort and secure lifestyles. The *third* section addresses RVO representations of themselves and focuses on expressed organisational values and rhetorical strategies used to invite identification by prospective residents. The *final* section discusses key findings from the analysis and draws conclusions in relation to residents’ participation.

Representations of Retirement Village Living: Ageing, Retirement, and Lifestyle

Old, Age, and Ageing: Largely Absent Terms

References to *age*, *ageing*, or *years old* were notable for their rarity in brochures or advertisements aimed at prospective residents. For instance, in 10 corporate and village brochures, the phrases “55-years or over” and “aged 55 and over” appeared only twice. The term “over 55s” appeared, but the absence of the words *age* and *years* was notable. Images, on the other hand, portrayed older people in a range of activities (see Figures 6.1, 6.2, and 6.3, later this chapter). It would seem that direct references to *age* do not sell retirement village living (a point noted by RVO senior managers and discussed in Chapters 8 and 9) because any direct references may risk eliciting taken-for-granted negative associations of ageing and old age. A similar point has been noted by Ylänne-McEwen (1999) in her study of the mature traveller industry where she identified a lack of reference to ageing in advertisements for travel and package tours aimed at people over 55-years. The absence of age references gives the

reader greater opportunity to identify with other aspects of the RVOs' products and services.

The only document (11th) to use "age" and "old" (in phrases such as "55+ year olds" and "65+ year olds") was Vision Senior Living's (2004 – 2005) investor brochure. Here the terms are used to capture macro-level and demographic information as in "the growing proportion of 65+ year olds" (p. 1); "a generation . . . will reach the notional age of 'retirement'" (p. 2); and "there will be far more reaching this 'retirement age' than ever before" (p. 2) The use of "age" in the context of demographics serves to depersonalise the notion and keep it distant from the lived experience. At the same time, the use of these demographic terms links the growth of the retirement village sector – the market – with population growth and in so doing, leverages a discourse of determinism.

Retirement: Three Variations of the Term

Representations of retirement were identified through Burke's indexing method (Cheney & Tompkins, 1988) and included key word search, cluster analysis – "what goes with what" – and metaphors used to talk about retirement (Burke, 1973; Foss, 1996, 2004). The analysis revealed three interrelated ways in which *retirement* was used: (a) as a term of convenience to name and *label* a particular type of housing and/or the business sector involved; (b) as a *commodity* that could be developed, bought, and sold as lifestyle and investment; and (c) as a term for the concept of retirement as a particular *life stage*.

"Retirement" appeared on its own a mere 12 times and in this form was used to denote a *life-stage* or *time in life*. When paired with the word "lifestyle" and its synonym "living", retirement appeared a further 17 times. The term appeared most frequently as a *label*, as in "retirement village" or "retirement community" (27 times) or as part of the village name or logo (26 times). In comparison, the term "lifestyle" alone was used to denote a *way of life* or an *option* 36 times across the 11 documents.

Retirement as a label of convenience.

As a *label* the word “retirement” occurred in two formats: in conjunction with the nouns “village”, “industry”, and “community”; and as part of the village or RVO name. *Retirement-as-a-label* accounted for the most frequent use of the word retirement (in the original 11 documents). However, the frequency halved when uses associated with village or RVO names were removed. For example, Ryman Healthcare used “retirement village” each time the logo or village name appeared: *Rita Angus Retirement Village* was always written in full. This resulted in the term retirement appearing in a Ryman Healthcare brochure at approximately three-times the rate of other RVO brochures.

One key difference was found in Vision Senior Living’s (2004–2005) investor brochure where retirement-as-a-label appeared six times more often than in Vision Senior Living village brochures (*Dannemora Gardens; Forest Lake Gardens; Waitakere Gardens*). Retirement-as-a-label appeared 30 times in just over 1400 words in the investor brochure in phrases such as “retirement industry”, “retirement village”, “retirement facilities”, and “retirement communities”.

The combination of content and communication goals related to different target audiences may account for the different frequency in use of retirement-as-a-label. In the *investor* brochure, for instance, the label of retirement is an important cue to identifying the market and connecting demographic growth in the target market with growth in the retirement sector. The repetition of “retirement” helps to strengthen associations between social trends and investment opportunities that retirement villages offer. On the other hand, in the *village* brochures, other than minimal references to “retirement”, use of the term was avoided. Thus, rather than focus on *age* and *retirement*, the brochures focus on *lifestyle*.

Retirement as a commodity.

The second category, *retirement-as-a-commodity* refers to that which may be developed, bought, and sold as lifestyle and investment, and

reveals two different but interrelated variations: those expressions of retirement-as-a-commodity connecting *individuals* and *retirement villages* (e.g., “retirement lifestyle”), and those expressions of retirement-as-a-commodity connecting *organisations* and *retirement villages* (e.g., investment). Expressions of retirement-as-a-commodity associated with individuals include those which highlighted different types of retirement living and lifestyles. For example, “retirement resort” could be interpreted as a kind of lifestyle choice primarily associated with individuals. However, it also has the capacity to be associated with organisations when used in conjunction with terms such as “developments”, “investments”, and “units”, because these are items that investors could identify as commodities for sale and purchase.

These expressions of retirement are viewed as *commodities* because in addition to *use value* for a given individual, these particular representations of retirement and lifestyle have *exchange value*. Commodification involves the conditioning of *desires* so that desires become *needs*. Exchange and use value are united when *desire* is (re)presented as *need* (Baudrillard, 1988/2000). Commodification processes are evident in the brochures in the way that retirement village living is presented as a solution to the new retirement *need* for lifestyle. The desire being conditioned is the desire for a retirement experience that is different from traditional retirement living: that is, the desire to move away from medicalised ideas of retirement as manifest in *old age homes* and towards new ideas of retirement associated with *retirement lifestyle*. In these ways, the desire for non-traditional retirement becomes a lifestyle need and a commodity to sell: it has *exchange value*.

Importantly, explicit references to traditional notions of retirement living are scarce in the brochures apart from one. The Vision Senior Living (2004–2005) investment brochure makes explicit references to “institutionalised care” (p. 3) and “traditional retirement facilities” (p. 5). In using metaphors and other indirect references to traditional facilities,

the RVO relies on individual readers bringing their experience to the interpretation. For example, the RVO used quotation marks in conjunction with metaphors “retire”, “cocoon” and “golden years” (Vision Senior Living, 2004–2005, p. 3). These rhetorical tools help to alert the reader to ideas of protection, slowing down, and growing old, that are traditionally associated with ageing, as well as to the possibility of positive alternatives. The traditional retirement idea is negatively characterised by using the old-fashioned cliché “golden years” and the metaphor “cocoon” which suggest both protection and withdrawal from the active world. In contrast, Vision Senior Living presents its “philosophy” (p. 4–5) of retirement village living as responding to “rising expectations” (p. 1) that retirement will be different for this generation of retirees. Thus, in promoting retirement as a commodity, the RVO leverages ideas associated with positive ageing discourse, while stimulating negative associations between old age and other retirement living.

Retirement as a life-stage.

This third use of the term “retirement” concerns those uses where retirement was a descriptor for a *particular life-stage*. This variation of retirement was the least frequently used. The reason appears to be related to (a) the traditional meanings associated with the term retirement, and (b) the reluctance of RVOs (and society generally) to be associated with these traditional meanings. Thus, RVOs both positively and negatively characterise retirement as they attempt to *redefine* it. Consider the list of examples below:

1. We thought of retirement . . . and chose a new lifestyle instead. (Primecare, *Ocean Shores*, front cover)
2. Retirement has taken on a whole new meaning. (Primecare, *Park Lane*, p. 2)
3. All Primecare Villages are sited to gain a particular aspect of advantage or enjoyment of retirement. (Primecare, *Your 5 best retirement options*, p. 1)

4. Welcome to Waitakere Gardens . . . specifically designed with retirement in mind. (Vision Senior Living, *Waitakere Gardens*, p. 1)

5. The objective of management is to develop and enhance a standard of quality, which ensures the correct balance of independence and care at every stage of your retirement. (Summerset Group, *Where the living is easy*, p. 1)

6. Choosing a home for your retirement is an important decision. (Vision Senior Living, *Waitakere Gardens*, p. 1)

The first two examples (1 and 2) actively challenge traditional views of retirement as a life-stage: that is, retirement has a *new meaning* which is linked to *lifestyle*. This approach uses strategic ambiguity (Eisenberg, 1984; also see Burke 1945/1969) in that the term “retirement” is not explained but left open to (multiple) interpretations. It appears however, that the RVO is working on the assumption that the reader will interpret the term negatively, and consequently interpret the term “lifestyle” positively.

The next two examples (3 and 4) refer to siting and design, and in so doing highlight the *organisation’s role* in meeting the needs of people in retirement. The underlying assumption is that RVOs know what retirement is (for the reader), and have designed products and services to match. Again, the use of the term “retirement” is not explained, but rather used strategically to enable the reader to identify with the term (and therefore with the organisation’s products) based on individual interpretations.

The final two examples (5 and 6) use the pronoun “your” to bring the focus of retirement to the *individual experience*. Note that achieving a “balance of independence and care” and “choosing a home” are not unique to a retirement stage of life. Yet, the RVOs elevate these experiences in relation to retirement, and again, position their products and services as the perfect match for the individual’s retirement experience.

In short, the RVOs seem to use the life-stage notion of retirement to actively link traditional (and by implication *unwanted*) ideas of retirement, *new notions* of retirement as lifestyle, and the RVO *role* in these new developments. Thus, *retirement-as-a-life-stage* becomes another vehicle for linking retirement with retirement village living. In the promotional material RVOs seem to suggest a *new* preferred reading (see, Hall, 1993; Foss, 2004; Locke, 2004) of retirement-as-a-life-stage: that is, a term with new meanings and associations.

Vision Senior Living's (2004–2005) investor brochure also implies that retirement has new meaning. In this example, changes in *social trends* are connected with the life-stage of retirement. The use of quotation marks was one noticeable device used to facilitate the reader's identification with new meanings of retirement. Consider the following examples which suggest ironic or playful approaches to (current) meanings of words:

In 2006 the first of the "Baby Boomers" will turn 60. It will signal the start of a twenty year period when a generation of babies born in the post-war years will reach the age of "retirement". And, importantly, there will be far more reaching this "retirement age" than ever before – creating a "boom" in fact. (Vision Senior Living, 2004–2005, p. 2)

Vision Senior Living plays with the words "retire" and "retirement" in using quotation marks. The use of "retirement age" appears to be one of convenience, in that words such as "retirement age" are in common use. At the same time, the quotation marks imply that these words do not possess the meaning for Vision Senior Living that they have had for others in the past or currently. This device enables the investor-reader to interpret these terms *differently*; that is, engage with the possibility of other meanings.

The emphasis created by quotation marks enables Vision Senior Living to alert the reader to the possibility that, for this organisation, something is different about retirement. This difference is then reinforced in the pun-like play on "boomers" and "boom" which invites the investor

to see retirement villages as a good investment. This play on words suggests a form of *qualitative progression* (Burke, 1968), in that the phrase “baby boomers” sets up the reader for the introduction of an *alternative* reading of it, *which is not anticipated*. In addition, the playful use of “retirement” offers the reader the chance to identify with this difference – a difference which is explained on the following page in the document:

We at Vision Senior Living believe that “baby boomers” will not “retire” in the same way as their parents. They will not definitively stop work. Their home will not become a cocoon in which they live out their golden years.

“Boomers” will want to continue to lead an active lifestyle, and retain their independence at the same time they share the companionship of others. They will not want institutionalised care. “Boomers” will be looking for the sort of lifestyle that Vision Senior Living provides. (Vision Senior Living, 2004 – 2005, p. 3)

The structure of these consecutive paragraphs is interesting: the first paragraph lists all the reasons why “baby boomers” will retire differently from their parents. Each of the reasons is stated as “will not” and this is significant because it negatively frames traditional forms of retirement. In the second paragraph, the wants of “boomers” (now a shortened version of the earlier term which suggests positive overtones) are listed. In the centre of the text, this is juxtaposed with a final “will not” – a short, sharp sentence, before the final sentence in which the RVO positions itself as the (perfect) answer to “boomer” wants. Such communication strategies invite the potential resident and/or investor to identify with the idea that this RVO is treating retirement and retirement village living *differently*.

Summary of RVOs’ Representations of Retirement Village Living

In summary, there seems to be an absence of terms related to age, and a high association between the term “retirement” and two synonyms “lifestyle” and “living”, while the term “lifestyle” dominates. On the other hand, in the investor material, the terms “age” and “retirement” in

demographic contexts helped to link the social trends and population (i.e., the market) with growth in the retirement village sector. The repetition of “retirement” combined with the inevitability of population growth help to strengthen associations with RVOs, their products, and financial investment. In addition they help to *normalise* retirement villages as a form of living and validate them as a business and financial investment.

In conclusion, RVOs through their *non*-use of certain terms begin to frame the domain that is retirement village living: This is done in ways that create ideas about what is acceptable and not in terms of residents’ participation. The shift from “retirement” to “lifestyle”, for instance, is a form of inducement that is infused with historical notions of old age homes as well as current discourses of consumption. RVOs use lifestyle to invite potential residents to join not only a retirement village, *but also possibly the RVO*. The use of *lifestyle* as a discourse of retirement village living raises questions about what is meant in practice. That is, what do RVOs actually offer residents in the way of lifestyle? And, what are the possibilities of such offerings for residents’ participation in RVOs? The next part of the chapter explores just this.

Representations of Retirement Village Lifestyles: Active, Leisure, Resort, and Secure Lifestyles.

I applied three rules for the selection of texts and images for textual analysis with regard to representations of retirement village lifestyles. First, where an image was used more than once, the subsequent uses were not counted. With regard to selection of text, stand-alone sentences were included where they were captions to images, or used as featured text. Otherwise, selections were usually paragraphs. The dominant topic of the featured stand-alone sentence, or the single paragraph determined its categorisation.

Second, descriptions and images of activities and amenities which were *internal* to retirement villages were the key signifier for selection.

However, where references to *external* but nearby community amenities, recreational facilities, and activities were used to promote one or more lifestyle themes, they were included. For instance, a nearby golf course or beach may feature as part of *leisure* lifestyle.

Third, only aspects relevant to *retirement lifestyle* were selected; that is amenities, activities, and accommodation choices. Excluded were references to: contracts, purchase prices, financial aspects of services; construction programmes and anticipated sales; management team and functions; and retirement village contact details. Although newsletters sometimes included this information, for the main part, promotional material routinely sent to enquirers rarely contained information about contracts, costs of services, construction programmes, sales, and so on. Apart from the village contact details, much of this information is usually discussed later in the prospective resident-RVO relationship (Employee interviews).

The textual analysis of the promotional documents reveals four central streams of lifestyle: *active and more traditional "retreatist" leisure lifestyles*, as well as *resort and secure lifestyles* (see Table 6.1). *Active* leisure lifestyle is seen in the texts or images showing people engaged in sport or other activity requiring active physical engagement, for instance, bowls, swimming, and other sports. "*Retreatist*" or less active leisure lifestyle includes those activities best described as rest-and-recreation which suggest more traditional ideas of retirement (see Featherstone & Wernick, 1995). These activities include, for instance, board games, handcraft, and reading. Active and retreatist leisure lifestyles texts and images tended to foreground *people* over images of *amenities* and buildings.

The third theme, *resort lifestyle* is closely related to the leisure lifestyles, but focuses more on the *presence* and *availability* of various facilities and services. References identified as resort lifestyle included text and images that foregrounded buildings, architecture and design features, village amenities, recreational facilities, and accommodation features.

Finally, *secure lifestyle* focused on *access* to services and facilities *when desired or needed*. For text and images to be counted in this category rather than the resort lifestyle category, there had to be a reference to *alleviation of a particular concern*. For example, when the resident is away home maintenance will carry on, or if a resident's health deteriorates services will be provided.

In representing retirement village living as active and retreatist leisure lifestyles, the RVOs aim to create pull-factors with features that attract people to a new lifestyle through shared ideals and values (Stimson, 2004). These pull-factors invite prospective residents to identify with a positive ageing experience *that is to be acquired in their villages*. RVOs drew on different, but related discourses in linking lifestyle to their products. Historically, discourses of ageing have centred on notions of decline, and entry to institutional living was a clear sign of "going downhill". In order to distance retirement villages from these ideas, RVOs appeal simultaneously to discourses of active ageing, positive ageing and retirement-as-leisure. Together these discourses influence enactment of *participation*.

Active Leisure Lifestyle: Discourse of "Active Ageing"

About 20% of the images used in the documents showed active residents in the sense that they illustrated individuals and groups of people engaged in some form of physical activity (See Figure 6.1.) Bowls and bowling greens featured in every brochure except two (Metlifecare, 7 *St Vincent*; Guardian Healthcare, *Winara Village*). Other outdoor sports included pétanque and croquet (Metlifecare, *Experience Metlifecare*; Ryman Healthcare, *Rita Angus Retirement Village*). While aqua-aerobics featured in a Primecare brochure (*Ocean Shores*), pool use in other documents was more social (Ryman Healthcare, 2005; Summerset Group, *Village Life-where the living is easy*). On the whole, these activity images highlight physical fitness and effort.



Figure 6.1. A selection of brochure images representing "active lifestyle". (Clockwise from top left: Primecare, Ocean Shores, p. 3; Metlifecare, Experience Metlifecare, p. 6; Summerset Group, Where the living is easy, back cover; Ryman Healthcare, Hilda Ross Retirement Village, back cover; Vision Senior Living, Forest Lake Gardens, p. 1, also Centre, back cover)

Written texts, on the other hand, that featured activity-oriented discourses were minimal and this suggests that RVOs expect the images to speak for themselves. The texts in evidence clearly link *village facilities* and *individual activity*: that is, the environment encourages an active response. Consider these examples:

Experience new activities “I had never bowled before I moved into the village”. (Metlifecare, *Experience Metlifecare*, p. 6, format from original text)

Aqua aerobics is a popular activity in our beautifully appointed heated pool. (Primecare, *Ocean Shores*, p. 4)

FOR THE ACTIVE Heated swimming pool, gymnasium, lawn bowls, dance floor, pentanque [*sic*] and walking! (Vision Senior Living, *Forest Lake Gardens*, p. 2, format from original text)

These excerpts illustrate how RVOs closely associate activities with available facilities. The verb-preposition-noun combination (without adjectives) reveals a pattern of “your activity” plus “our facility” equals active leisure lifestyle, for instance, in the first and second excerpts: “bowled . . . into . . . village” and “aqua aerobics . . . in . . . our . . . pool”. In the third statement the colon juxtaposes yet connects two distinct ideas: the implied active individuals and the list of village facilities and activities. The unspecified and passive *who* in the definitive “the active” implies the reader – and residents – could, or even should, be active. This position is evident across three texts in that terms such as “experience” and “activity” target individual behaviour and invite the reader to identify with “active” lifestyle. In so doing, the terms imply the reader should avoid the shadow opposite: “inactive”. Finally, in describing facilities as “beautifully appointed”, RVOs promote themselves by association. *Each of these statements implies that the village environment enables residents to be active and therefore, it can be inferred that other places will not.*

It would appear that *age* is not the key criterion to define the market segment for RVOs’ services and product offers. Although RVOs aim their

messages at the “55-plus” age group, and rely on retirement-as-a-stage to demarcate their products and services, it is accepted practice that *age* itself does not sell the product (Senior Manager Interview). *Rather, the organisations use a range of activity oriented options for the reader to identify with*, including phrases such as “for the active”; “for the social”; “for the peace seekers” (Vision Senior Living, *Forest Lake Gardens*, p. 2); “for the young at heart” (Summerset, *Summerset Group Profile*, p. 1); and “for those of you who prefer” (Summerset, *Village life - where the living is easy*, p. 1). The open meanings and multiple interpretations along with positive overtones mean that there is a greater likelihood of more people over 55-years identifying with them.

This is a clear example of RVO rhetoric inducing readers to identify with its products in a new way and may be explained as *consubstantiality* (Burke, 1950/1969). That is, as individuals align themselves with physical objects, occupations, friends, activities, beliefs, and values, “they share substance with whatever or whomever they associate and simultaneously define themselves against or separate themselves from others with whom they choose not to identify” (Foss et al., 2002, p. 192). Thus, the RVOs avoid references to old age and re-present their products in the discourse of positive ageing. In so doing, RVOs both *induce* potential residents to identify with them, and *identify* with older people who want to avoid being categorised as “old”. Finally in the process, RVOs simultaneously dissociate from those *with whom they choose not to identify*: that is, *the aged and old*.

Discourses of positive and active ageing infuse representations of retirement village living and challenge perceptions about ageing and roles of older people in society (e.g., Blaikie, 1999; Dalziel, 2001; Grant, 2006). Yet, the very nature of *positive* ageing discourse assumes that the opposite exists (Blaikie, 1999) and these active images seem to leverage the absent but implied *negative* discourse of ageing. The RVOs achieve this by inviting prospective residents to identify with the opportunity to be *active*

rather than to age or grow old (implied and not stated). Thus, consistent with the discourses of positive ageing (e.g., Blaikie, 1999; Grant, 2004, 2006) these retirement villages may be seen as societal vehicles that promote ideas of activity, ability, and personal growth in later life.

In summary, three important points arise from the representation of retirement village living as active leisure lifestyle. First, the RVOs imply that it is the village environment that enables residents to be active, thereby enhancing the *agency* of the RVO in *creating* residents' retirement. Second, rather than age, the RVOs focus on activity as the central aspect of retirement village living for prospective residents to identify with. Third, RVOs leverage discourses of active and positive ageing because they offer alternatives to the traditional stereotypes, but in so doing leverage fears of ageing as decline, senility, and illness.

"Retreatist" Leisure Lifestyle: Discourse of Retirement as Non-work

The emphasis on traditional retreatist leisure activities was evident in 30% of the images across the 11 documents. This retreatist leisure theme concerned quiet and/or solitary activities associated with the more traditional, and often less attractive ("retired") version of retirement (see Figure 6.2). As Featherstone and Hepworth (1995) note, for some positive ageing "finds its expression through hobbies associated with the traditional [retirement] image associated with retreatist relaxation" (p. 40). This traditional and "anti-fashion" (Polhemus & Proctor cited in Featherstone & Hepworth, 1995) view of retirement is demonstrated in leisure activities such as gardening, painting, board games, handcraft, and reading. The idea that *active* leisure is now viewed as the norm for retirement raises issues about the value of anti-fashion, retreatist leisure. Rather than denigrate these more traditional activities of retirement actively or by omission, the RVOs framed such leisure pursuits within the domain of *choice*.



Figure 6.2. A sample of images that represent traditional “retreatist” leisure lifestyle. (Clockwise from top left: Primecare, Acacia Cove, p. 3, Ocean Shores, p. 5; Ryman Healthcare, 2005, p. 5; Summerset Group, Where the living is easy, front cover; Vision Senior Living, Forest Lake Gardens, back cover. Centre; Ryman Healthcare, Hilda Ross Retirement Village, p. 2)

The interconnected discourses of retirement-as-leisure and retirement-as-non-work underpin the retreatist leisure lifestyle. They work together to help RVOs normalise their products and to promote a sense of choice in peoples' lives. Leisure has been defined as largely a choice-based activity with intrinsic value for the individual (Arendt, 1958). In this sense, leisure may be seen to be freedom from work and labour – both of which possess exchange-value. Retreatist leisure is represented in the brochures as freedom from work and leverages the intrinsic values associated with leisure by framing them as *choice*. Thus, it focuses on the *intrinsic value* of retirement and on its inherent choice. Consider these excerpts from the promotional texts:

Just the place for you to sit and read the newspaper or meet your friends and fellow residents. (Guardian Healthcare, *Winara Village*, p. 4)

You're welcome to exercise your green thumbs in the gardens surrounding your home. (Guardian Healthcare, *Winara Village*, p. 4)

For some quiet time, browse through a selection of books or newspapers, or relax in front of the fire in the library. (Vision Senior Living, *Dannemora Gardens*, p. 3)

For those who prefer the quieter pursuits, you can retreat to the library, hair salon or watch the big screen television. (Summerset Group, *Village Life-where the living is easy*, p. 1)

[The village] is just an easy stroll to the familiar Remuera shops. (Metlifecare, *7 St Vincent*, p. 2)

The verbs in these excerpts, "sit and read", "browse", "relax", "retreat" and "stroll" create a sense of quiet leisure. Even the synecdochical metaphor "exercise your green thumbs" minimises the physical activity of gardening by using the thumb to refer to the whole body. As was the case with active leisure lifestyle, these excerpts highlight village facilities (e.g., garden, library, hair salon) while ostensibly focusing on leisure. However, and in common with active ageing discourse, the

retreatist leisure discourse helps to cast these activities in a new light by framing them as *choice*. “You’re welcome” is an invitation to choose, as is the use of the word “prefer”. The verbs “browse” and “stroll” by their very definition imply unhurried but *choice-conscious* activities.

Choice is expressed in the sheer number and range of amenities and services identified in text and images. Consider the example from Primecare (*Acacia Cove*, see Figure 6.3.) in which the detailed text and supporting images convey messages about facilities and choice. The images, although small, show a range of social and recreational activities. The text lists over 20 recreational amenities located in the village Community Centre or nearby. The extensive range implies choice, because not every resident would be interested in every feature. Moreover, the adjectival phrases “superb setting”, “tranquil outlook”, “spectacular sunsets” along with “beautifully appointed meeting rooms” and “company of friends” positively characterise features of Acacia Cove, and thus *invite readers* to identify with the social and recreation opportunities offered by them.

Furthermore, choice is expressed in the texts through the explicit use of the terms “choice” and “choose”, and synonyms such as “prefer”, “select”, “elect”, “opt”, “option”, and “like” or “want to”. The use of these terms varies from brochure to brochure and on average appears approximately six times per brochure. However, in all of the promotional material the idea of choice is implicit throughout.

The significance of village residents’ choices, whether in regard to active or retreatist leisure, is thrown into relief when considered against the history of “old age homes” where choice for “inmates” was all but absent (Tennant, 1989). In this context radiations of terms are useful to examine as they highlight implications of associations or relationships between terms of a text (Burke, 1966b). Radiations are “spin offs” (Cheney & Tompkins, 1988, p. 466) from a given term. The implications of spin-offs from the term *order*, for example may include *hierarchy, authority, control*



LIFE IS TO BE ENJOYED

Acacia Cove provides the means towards an enhanced lifestyle. A superb setting flanked to the east by Wattle Downs Golf Course and to the west by an estuary teeming with aquatic wildlife.

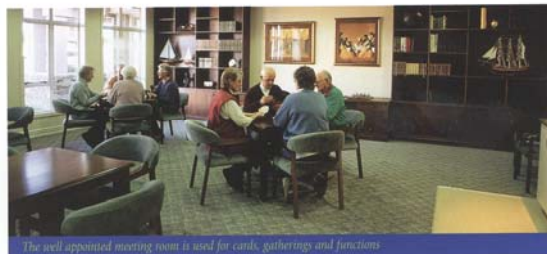
Our magnificent "Lodge" Community Centre is positioned to maximise the tranquil outlook and spectacular sunsets. With the bowling greens, indoor pool, activities room and workshops all facing the sun and the estuary, comparisons are hard to find. Immediately above, the lounges and restaurant provide a strong temptation to enjoy the late afternoon warmth in the company of friends and neighbours.

Within the centre there is also an open fire setting, billiards and snooker tables, a bar, heated pool, spa bath and gymnasium, hairdressing salon, nurses station, library, computers and a beautifully appointed meetings room.

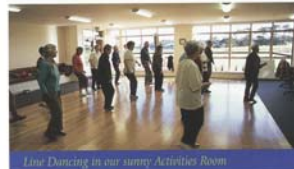
It also forms the focal point for all activities from the walking group and garden club, to meeting before and after going across the road to the Golf Course.

THERE'S A LOT NEARBY.

Besides the abundant wildlife that includes a flock of Royal Spoonbill in Wattle Farm Reserve, you can choose from regular excursions to crafts, sporting and cultural pursuits or local attractions like the Auckland Regional Botanic Gardens just up the road.



The well appointed meeting room is used for talks, gatherings and functions



Late Dancing in our sunny Activities Room



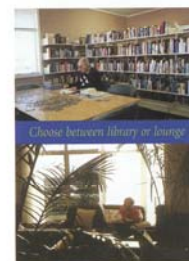
The Village Shuttle is available to all

The major shopping centres of Manukau City and Botany Town Centre are within easy reach of our regular Acacia Cove Village shuttle bus should you not want to take your car.

"A conversation amongst friends or neighbours is there when you choose".



Drinks at the bar



Choose between library or lounge?

Figure 6.3: An example of how the concept of choice can be implied through descriptions and images of amenities and activities

and even the opposite *disorder* (Cheney & Tompkins, 1988). In the context of this study, radiations of *choice* become important and include values of *freedom*, *self-determination*, and *flexibility*. Thus, the promotional material appears to connect held values (i.e., freedom and self-determination) with retirement village living as expressions of them. That is, retirement village living is presented as having all the benefits of normal, everyday life in terms of the individual's capacity to choose. Typical of brochure text was the phrase "you have freedom to live as you do now" (Guardian Healthcare, *Winara Village*, p. 3). Clearly then, choices will be the same for those living at the retirement village as those in their current home, yet in listing the number and types of choices available and accessible at the retirement village, and appealing to values of freedom, RVOs imply that residents have greater freedom by living in a retirement village than anywhere else. Thus the concept of choice challenges historical representations of institutions and old age homes and yet also leverages that history.

Finally, choice is linked explicitly to expressions of identity. The capacity to be oneself is prevalent across all of the promotional material. Consider the following excerpts from Vision Senior Living (*Dannemora Gardens*):

Your home is an expression of your personality. Therefore, what counts more than anything else is freedom of choice – to be able to choose spaces and surroundings that make you feel comfortable.

Dannemora Gardens gives you that liberty. . . . Its emphasis is on providing you with a range of home styles, community facilities and services – so you have the freedom to choose the lifestyle you want.

. . .

Choice is further illustrated when it comes to creating a home. On-site and handy to all the fabulous amenities are a choice of apartments. All are available in a variety of sizes, interior design, underground parking, some with gardens, [and] others with easy care balconies. (p. 1)

. . . choose from colour schemes and finishes which complement the architecture and allow your personality to shine in your own home.
(p. 4)

The repetition of “your personality”, “freedom”, “choice” and “choose” as well as synonyms such as “liberty” and the practical examples of choice, reflect values associated with self-determination. The text explicitly links “expression of personality” (read *identity*) with choices about home location and design. Moreover, as with active leisure lifestyle, the RVOs represent their products and services as *enabling* residents to express their identity, through the “variety” and “range of home styles, community facilities and services”. Thus, RVOs and residents, in Burke’s terms (1950/1969), share substance and are made “consubstantial” (p. 21). Unlike the old age home where “inmates” lived in homogenous and restricted institutional living, retirement village residents are free to be themselves. There is some irony in this: join a retirement village to be free.

Three discourses appear to be at work here. In appealing to *choice* the RVOs locate their rhetoric within both (a) market and (b) positive ageing discourses. However, the discourse of ageing-as-decline is the shadow of choice; an ever-present background reminder of what might be (no choice) if readers ignore RVO offers. Thus, RVOs draw on active and positive ageing discourses to promote their products and use the shadow discourse of ageing-as-decline as leverage. They seek to influence readers’ existing mental models (van Dijk, 2001) of retirement villages as *places of last resort* by re-presenting them as *retirement resorts*.

Resort Lifestyle: Discourse of Holidays

In (re)presenting retirement village facilities as resort-style, the RVOs suggest a natural link with active and retreatist leisure lifestyles. Brochure images depicting hotel-style environments accounted for 50% of all images used and included lobbies and lounges, accommodation interiors, panoramic views, as well as amenities (see Figure 6.4). Rarely were people present in such images, and where they were seen were

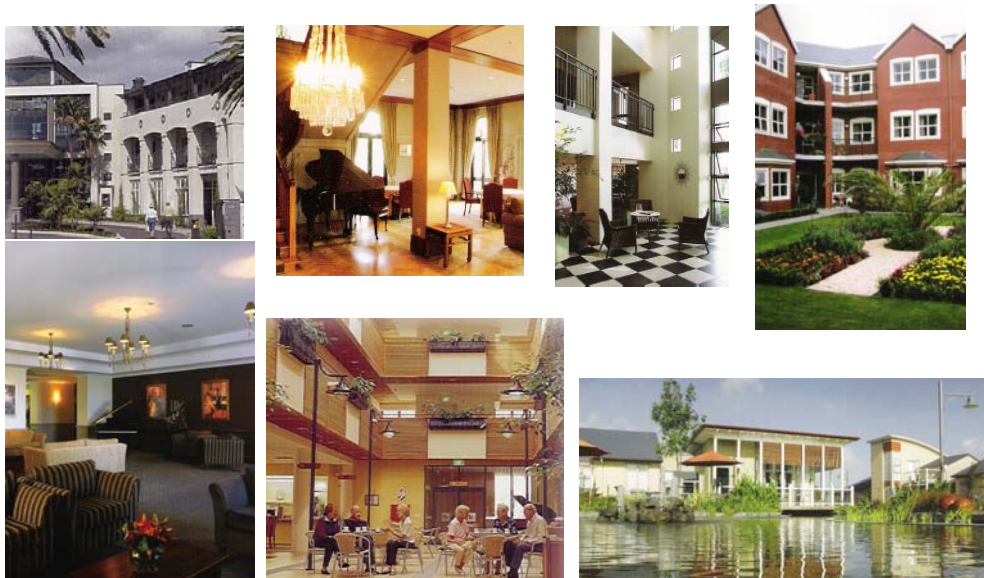


Figure 6.4. A selection of brochure images representing “resort lifestyle”. (Clockwise from top left: Vision Senior Living, 2004-2005, p. 7; Metlifecare, 7 St Vincent, p. 1; Vision Senior Living, Dannemora Gardens, front cover; Ryman Healthcare, Rita Angus Village, front cover; Vision Senior Living, Forest Lake Gardens, front cover; Vision Senior Living, Waitakere Gardens, p. 1; Ryman Healthcare, 2005, p. 11)

largely indistinct. As with holiday brochures (e.g. Ylänne-McEwen, 1999), such images invite prospective residents to “put themselves in the picture” by identifying with the notion of holiday and hotels. The images of the village buildings and/or facilities help to represent retirement as living in a hotel or holiday-resort like environment.

Holidays are commonly viewed as a break from work and home responsibilities and these hotel-like images encourage the viewer to identify with holiday-like experiences. The idea that older people in fact *deserve* a holiday is both implicit and explicit in the promotional material, for example:

We want our residents to feel they are “on holiday”. (Vision Senior Living, *The company behind your perfect retirement address*, p. 1)

Becoming a Metlifecare resident is much like joining an exclusive club . . . including access to common facilities . . . such as community centre, swimming pool, bowling green, and restaurant. (Metlifecare, *Experience Metlifecare*, p. 8)

And like a resort, the accommodations could be either garden villas or multi-level apartments clustered above garden courtyards and spacious atria giving a sense of both privacy and community. (Vision Senior Living, 2004 – 2005, p. 4)

Each one of these statements uses or implies a simile to convey some sense of how residents should participate in this environment. Each comment compares retirement village living with the holiday, vacation- or hotel-like experience. The “exclusive club” and the description of apartments as “clustered above garden courtyards and spacious atria” suggest more than dwellings and an experience different from regular everyday living. Being on holiday implies that retirement village residents are not engaged in meaningful work with *extrinsic rewards*, but rather, activities with purely *intrinsic rewards*.

There are several reasons why RVOs would choose to use discourses of leisure and the associated images of recreation, holidays, and

resorts in the promotion of retirement villages. First, consumption of resort-style living contrasts with the shadow-opposite image of traditional institutional aged-care facilities. Second, RVOs imply that in living at a retirement village residents are privileged (a) because they do not *need* to be in paid work, and (b) because they have the resources (personal and financial) to be on (a deserved) *permanent* holiday. Third, direct references to exclusivity imply status for residents and the RVO. For residents “exclusive” and “resort-style” living becomes currency of positional consumption that communicates a new identity for them. *By dissociating from “old” ageing discourses and associating with new, RVOs promote themselves as sources of this new identity and “new” and exclusive ageing.*

Market discourse infuses resort lifestyle because it relies on the buying and selling of a lifestyle commodity. As with retreatist leisure lifestyle, the notion of choice seems to be a critical framing device. The metaphors of “resort” and “hotel” enable the RVOs to position their products and services as *choices* that residents – guests – pay for.

Secure Lifestyle: Discourse of Risk Management

Images that exemplify *secure lifestyle* were almost completely absent from the brochures. On the other hand, text references to *secure lifestyle* accounted for over 20% of the total texts – second behind *resort lifestyle* text references (approximately 27%). The theme of security manifests in three key ways:

1. Personal security;
2. Personal health security; and
3. Property security.

The distinctions between *personal security* and *personal health security* hinge on defined boundaries of *need*. I defined *personal security* as concerned with social isolation, and *personal health security* as concerned with “what if” situations such as accidents and illness, as well as fears of anticipated physical isolation often associated with older age. Representations of property, personal, and health security all rely on the unspoken negative

discourse of ageing-as-deterioration and social deprivation. Examples of each are listed below:

1. **Experience Freedom** "I can go away for a few days or a few months without worrying about my home and garden". (Metlifecare, *Experience Metlifecare*, p. 7, format from original text)
2. **Experience Companionship** "I've made so many new friends". (Metlifecare, *Experience Metlifecare*, p. 6, format from original text)
3. **Experience Security** "I can relax knowing that medical care is available should I need it". (Metlifecare, *Experience Metlifecare*, p. 7, format from original text)

Although the above examples are all from Metlifecare, they epitomise representations across the promotional documents. What is notable from a communication perspective is how traditional concerns of ageing, such as coping with home maintenance and developing health issues, are *reframed to highlight lifestyle*.

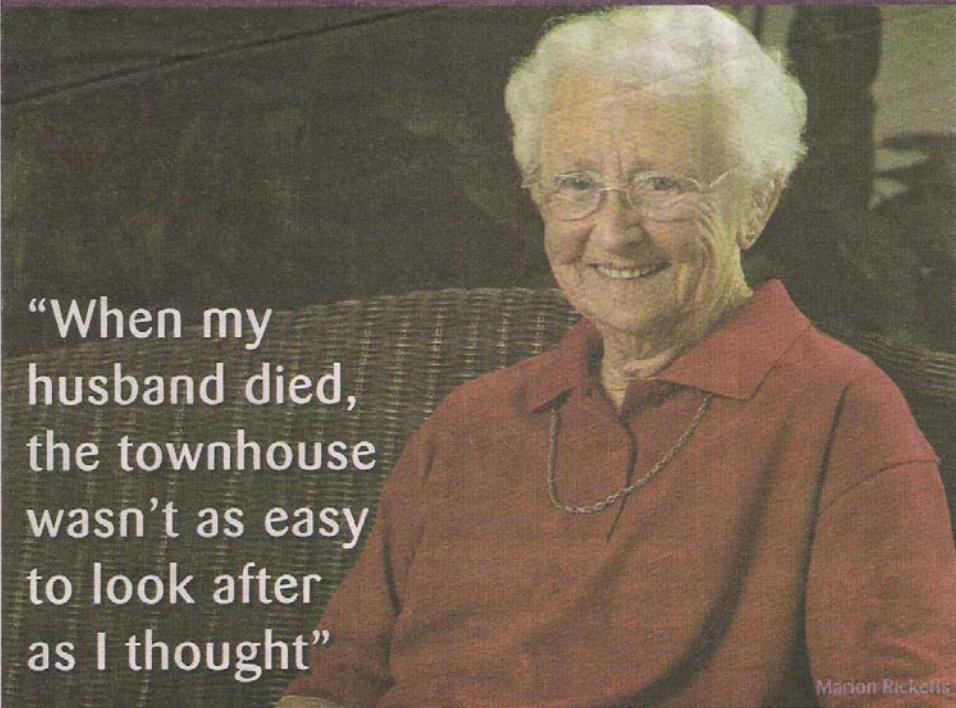
Security is reframed in a number of subtle ways. Consider the example "Security – Lifestyle – Companionship – Wellbeing" which is repeated throughout Vision Senior Living's family of brochures (*The company behind your perfect retirement address; Dannemora Gardens; Forest Lake Garden; Waitakere Gardens*). These terms are ambiguous – that is, open to different interpretations by different audiences. However, they act as pull-factors which reframe push-factors associated with negative images of ageing. Concerns about failing health or the possibility of burglary or home invasion are implied by the term "security". Similarly, concerns about driving or friends no longer driving, or living in a street where neighbours are away at work all day, are captured in the promise of "companionship". The term "lifestyle" implies choice, and addresses concerns about not having choice because of factors that impinge on mobility. The term "wellbeing" emphasises positive rather than failing health. It may also address personal concerns about "living with a whole lot of sick people". In these ways, secure retirement lifestyle is presented

as a series of choices which alert the prospective resident to the possibility of being able to manage some perceived (and real) risks of older age.

Significantly, images in the brochures which depict *secure lifestyle* are rare and limited to health settings (e.g., taking blood pressure, Primecare, *Parklane*, p. 4). However two advertisements from Vision Senior Living provide useful illustrations. In Figure 6.5 the concern of managing home maintenance is reframed in terms of personal preferences such as doing it “on my own wasn’t so much fun” and “didn’t want my friends’ husbands” doing it either. These phrases suggest wanting enjoyment and to avoid burdening others and/or becoming obliged to others. Thus, in addition to exercising choice, they seem infused with the discourse of individual responsibility. In Figure 6.6 maintenance is reframed in terms of time which makes it possible to set up an oppositional relationship between *time for self* and *time for maintenance*. By emphasising “ease”, “fun”, “relief”, and “time”, the issue of property maintenance shifts from one of concern to a matter of lifestyle choice. In this way, messages about push-factor-reasons for moving to retirement villages are muted by messages promoting pull-factors and individual choices.

These different aspects of security point to an important concern in Western culture: the perceived vulnerability of people over a certain age and the inability of family to fulfil the protection role. Ambivalence towards ageing and aged people in Western societies (Achenbaum, 1995; Blaikie, 1999; Featherstone & Wernick, 1995; Minios, 1989) combined with Western emphasis on individual independence and social changes affecting (traditional) family roles seem to result in an overwhelming concern with security. Some older people express the desire to not be a burden on their family (Leonard, 2002) and moving to a retirement village thus alleviates the family from having to be “on call” and/or from the guilt of not being in the position to be on call (see Figure 6.5 for specific example of this: i.e., “my son lived too far away”). At the same time,

THE EASTERN SUBURBS' PREMIER RETIREMENT RESORT



“When my husband died, the townhouse wasn't as easy to look after as I thought”

Maïon Rickells

“In 1995, Noel and I had moved in to a townhouse with the view to remaining there for our retirement. And even after he died in 1998, I thought I could continue to manage...”

“Pretty soon I found that having to look after things on my own wasn't so much fun ... keeping the garden looking nice and tidy, cleaning out the spouting, washing down the patio... My son lived too far away to help. And I didn't want my friends' husbands climbing ladders and so on just for me...”

“Moving here to Dannemora Gardens was a great relief. Now I can enjoy retirement without worrying about all the day-to-day maintenance. They take care of it all!”

The Perfect Retirement Address

30 MATARANGI ROAD (OFF HAVEN DRIVE), BOTANY DOWNS
PHONE 272 2467, www.dannemoragardens.co.nz

VSL A VISION SENIOR LIVING COMMUNITY
Applications to be made on the Investment statement available at the sales office.

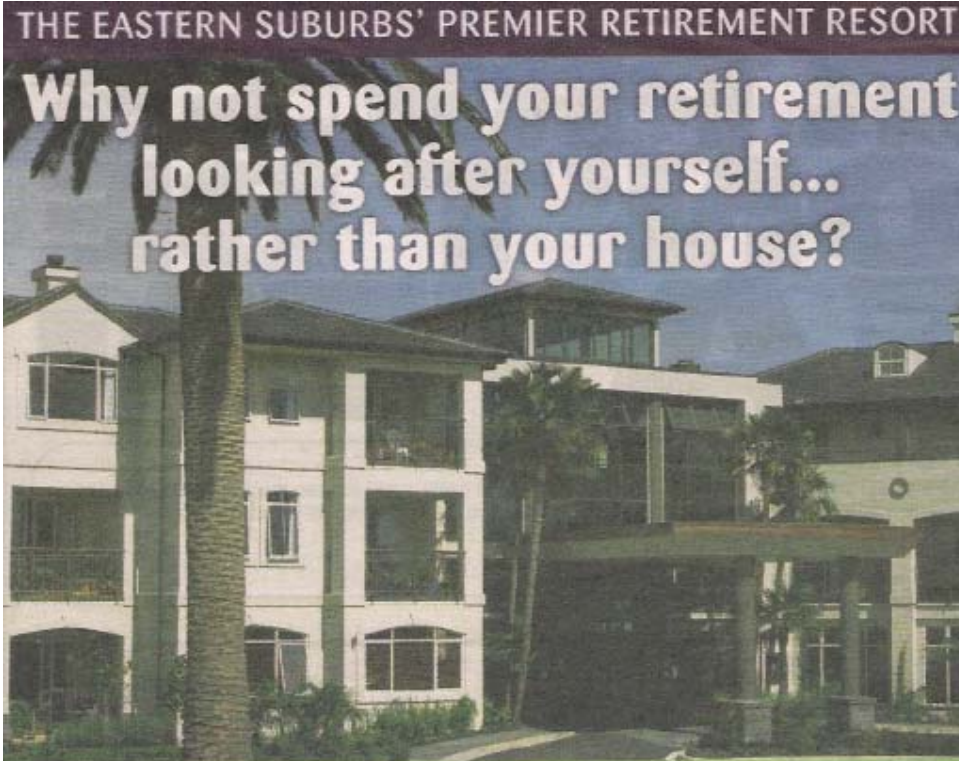
DANNEMORA GARDENS

71303

Figure 6.5. Example of an advertisement depicting secure lifestyle (Vision Senior Living, 2004c).

THE EASTERN SUBURBS' PREMIER RETIREMENT RESORT

Why not spend your retirement looking after yourself... rather than your house?




Retirement is a time for you to enjoy. It's a time for you to take a well-deserved break from years of work ... providing a home, and caring for a growing family. It's a time when you may no longer need a large house or section. And when you certainly won't need (or want!) the maintenance that comes with it.

Located opposite the Botany Town Centre, Dannemora Gardens provides all the facilities you'd expect at a vacation resort ... lounges, swimming pool, spa, bowling green... As well as being a short walk to the town's extensive amenities - including, shops, restaurants, cafes, and theatres.

Architecturally designed 1, 2 and 3 bedroom apartments priced from \$215,000.

The Perfect Retirement Address But don't take our word for it ... come and see for yourself. Any day of the week from 10.00am to 4.00pm.

30 MATARANGI ROAD (OFF HAVEN DRIVE), BOTANY DOWNS
PHONE (09) 272 2467, www.dannemoragardens.co.nz

VSL A VISION SENIOR LIVING COMMUNITY
Applications to be made on the investment statement available at the sales office. 


DANNEMORA GARDENS 

Figure 6.6: Example of an advertisement depicting a leisure perspective on secure lifestyle (Vision Senior Living, 2004d).

moving to a retirement village enables the individual older person to experience the additional securities mentioned above. Thus, as with the other lifestyles streams, the RVOs promote their role in helping residents achieve this. Consider the following excerpts:

We have the experience to understand the needs and aspirations of our residents. (Metlifecare, *Experience Metlifecare*, p. 2)

We celebrate the diversity of aspirations, desires, and needs of our residents. (Vision Senior Living, *The company behind your perfect retirement address*, p. 1)

It's a choice of how you want to live your life . . . (Primecare, *Your 5 best retirement options*, p. 2)

The key terms “aspirations”, “needs”, “desires”, and “choice” are broad and open to multiple interpretations. However, from the RVOs’ perspective, the *preferred* reading (see Hall, 1993; Foss, 2004; Locke, 2004) would be that readers identify with the capacity of the RVO to enable residents to enact lifestyle choices. That is, RVOs promote their facilities and staff as there to meet the needs of residents and therefore to *serve* the resident. Such organisational aspirations contrast with historical images of institutionalised, regimented life in old people’s homes (Tennant, 1989). By contrast then, RVOs promote themselves as innovative and villages as demonstrably different from institutions of the past.

In summary, the issue of security manifests in three ways: as personal security; as personal health security; and, as property security. Notable from a communication perspective is that traditional concerns of ageing were reframed to highlight lifestyle rather than risk. In this way, retirement village living is presented to subtly promote retirement village living as a risk management strategy. Finally, the RVOs promote their role in helping residents achieve this.

Summary of RVOs' Lifestyle Representations

It is important to examine how each of these lifestyle discourses influences potential resident participation in retirement village life. In the active and retreatist leisure lifestyle discourses the RVOs foreground the activity of the individual and connect this with background retirement village facilities. However, in the resort lifestyle images and texts the RVOs *overtly* present – i.e., market – the retirement village environment. With secure lifestyle, the RVOs leverage *lifestyle and choice* and promote their own roles in residents' achieving security in the personal, health, and property domains. *The combination of active and retreatist leisure lifestyles and the resort-style environment frames participation as a partnership in the production of the product: the village itself.* The RVOs provide the structural and physical environment and residents live the preferred retirement lifestyle.

As inducements these representations offer lifestyle benefits to residents while implying there is a *partnership* relation between the RVO and residents. In this way, RVOs firstly, allay latent concerns that potential residents may have about institutional living, and secondly, appeal to held values of individual self-determination. However, in framing (and possibly limiting) residents' participation within the construct of lifestyle, RVOs influence the boundaries, nature, and expectations of residents' participation in RVOs. From a critical perspective this seems similar to the effects of medicalised ageing and old age homes which ensured older people were systematically excluded from meaningful social and economic life (Saville-Smith, 1993). Similarly, a holiday lifestyle assumes no participation in the running of the organisation or meaningful, long-term relationships with staff. After all, to what extent do hotel guests engage with staff beyond obtaining services and completing the obligatory satisfaction survey? Therefore, the extent to which the lifestyle metaphor pervades retirement village life needs further exploration. In particular,

the forms and focus of resident (or customer) participation invites close examination.

In view of the finding that RVOs seem to present a partnership relationship with residents, it seems important to explore the ways in which RVOs represent themselves. Therefore the next section addresses RVOs stated credentials, espoused values, and expressions of relationships with residents.

RVO Representations of RVOs: Credentials, Values, and Relationships with Residents

The ways in which RVOs represent themselves are important, because lifestyle messages may not singularly succeed at converting initial readings of promotional reading into enquiry and subsequent purchase of retirement village accommodation. As one Senior Manager (from one participating RVO) said:

The content [of advertisements] says “oh come in live in a retirement village you’ll have heaps of fun”. Everyone says “fun-filled lifestyle” but as someone’s pointed out, for a lot of these people, they say “well I’m having fun already why should I go live in a village?” (Interview Excerpt 1)

From this statement it would seem that RVOs recognise that retirement village living is in some ways no different from existing lifestyles for people over 55-years. Therefore, RVO promotion uses inducements other than “fun-filled lifestyles” to encourage potential residents to identify with retirement village living. The form and content of messages help to construct a “social contract” between residents’ and RVOs and therefore, generate expectations for residents’ participation in the RVO. In the light of this, RVOs’ rhetorical strategies and messages warrant closer examination. This final section explores the ways in which RVOs’ *credentialise* their organisations, *express values*, and *represent relationships* with residents. It also examines rhetorical devices and discourses used in these processes.

RVOs' Credentials

Parts of the promotional material invite readers to view the RVOs as trustworthy organisations by using credentials to validate RVOs' claims. RVOs appear to credential themselves in four main ways: Through

1. Citing achievements;
2. Comparing themselves with the traditional aged-care sector;
3. Using insiders' (residents') testimonials; and
4. Citing recognition from outsiders.

Claims to achievement.

Claims to achievement include the length of time in the sector, experience in retirement villages, growth and size of business, and leadership positions. Four RVOs (Metlifecare, *Experience Metlifecare*; Ryman Healthcare, 2005; Summerset Group, *Summerset Group Profile*; Vision Senior Living, 2004–2005) state *the year they entered the retirement village sector*. For example, consider these excerpts:

In operation since 1986, we have the experience to understand the needs and aspirations of our residents. (Metlifecare, *Experience Metlifecare*, p. 2)

The Group has been operating retirement village facilities in New Zealand since 1984, and is considered to be a leader in many aspects of the industry including facility design, resident protection, standards of care, and staff education. (Ryman Healthcare, 2005, p. 2)

By mentioning the years 1986 and 1984 respectively, these RVOs signal to some audiences that they are part of the new wave of retirement villages. It would be hard to know if this information had any bearing on individual decisions to opt for retirement village living. However, in terms of claiming an identity position among significant others – in this case other RVOs which are in the same “clique” (White, 1981) or “competitive field” (Karpik, 1978) – then perhaps advertising such information is important.

It seems more reasonable to assume that naming specific years suggests to general audiences that these RVOs have been *successful* with this model of product development and service provision for over 20 years. In this respect, the RVOs use length of time in the sector to *claim expertise* of some kind which suggests values associated with both prestige and control (see Karpik, 1978). Metlifecare claims expertise by *experience* gained over time, while Ryman Healthcare (2005) claims expertise with specific references to *technology*, including design, and organisational communication structures and processes such as staff training and standards of care. Ryman Healthcare also uses the passive and non-specific phrase “is considered to be a leader” (2005, p. 2) to imply wide recognition of its leadership. Vision Senior Living also claims expertise in terms of experience. Consider the following excerpt:

Several of our senior management team have extensive experience in designing and building large developments. (Vision Senior Living, *The company behind your perfect retirement address*, p. 1)

The adjective “extensive” indicates time in the building sector, which in turn suggests *expertise and the potential for success* in the retirement village sector. Summerset Group provides an example of the length of time in the sector being linked specifically with business success:

Since commencement in 1994, the group has successfully established nine long term care facilities . . . [and seven] village facilities. . . . Summerset is the largest private operator of retirement villages and care facilities in New Zealand. (Summerset Group, *Summerset Group Profile*, p. 1)

Here Summerset lists the number and locations of its facilities, and then uses the superlative “largest” to claim a leadership position on the basis of these achievements. The subtext also suggests that there is *demand* for its facilities and therefore that success is ongoing. Listing the number and locations of facilities is a common communication strategy across the brochures, websites and newsletters (e.g., Metlifecare, *Experience*

Metlifecare; Primecare, Your 5 best retirement options; Ryman Healthcare, 2005; Summerset Group, Summerset Group Profile; Vision Senior Living, 2004 – 2005).

In order to claim success, the RVOs use the credentials of time in the business and the associated experience gained along the way: in other words the (good) decisions the organisation made. Self-promotion underpins this credentialing process: that is, the RVO's achievements over time are important when considered in terms of a market model which values growth. Noticeably, although humanistic values (Cheney & Frenette, 1993) are evident in the expression of concern for residents; other values of growth and leadership which are located within market discourses of competition appear to be prioritised.

Credentials through antithesis.

RVOs claim qualifications or *credentials* through comparison with the very antithesis of their new models of retirement village living: the traditional aged-care sector. Identification through antithesis has been described as the process of urging people to unite against a common enemy (Burke, 1950/1969; Cheney, 1983; Cheney & Tompkins, 1988; DiSanza & Bullis, 1999; Meisenbach, & McMillan, 2006). In this study, the "enemy" is traditional aged-care and associated negative images of retirement and ageing.

RVOs claim credentials by highlighting differences between them and traditional models and in so doing suggest values associated with innovation (Karpik, 1978). For instance, they explicitly focus on design aspects of facilities, reframe healthcare as "wellbeing", and some cases emphasise their lack of focus on healthcare. Consider these excerpts from the brochures:

The traditional concepts of retirement housing has [*sic*] been replaced by a *thoroughly planned environment . . . [with] superior and spacious housing with security and independence. (Primecare, Acacia Cove, p. 2, emphasis added)*

Vision Senior Living was formed over five years ago, with a total focus on *developing new look retirement villages* that meet the changing needs of today's over 55s. (Vision Senior Living, *The company behind your perfect retirement address*, p. 1, emphasis added)

Traditionally, retirement villages have focused on the healthcare end of retirement with rest homes and hospitals on site. *VSL's villages are quite different*. (Vision Senior Living, *The company behind your perfect retirement address*, p. 1, emphasis added)

The adjectival phrases “thoroughly planned”, “superior and spacious housing”, and “new look retirement villages” positively characterise retirement villages as opposed to the vague references to “traditional retirement housing”. The RVOs rely on the term “traditional” being read in negative ways. In contrast, but with similar effects, Vision Senior Living pointedly links “traditional” with the terms “healthcare”, “rest homes”, and “hospitals”. Again the RVO relies on these terms being read negatively, so that the final statement – “Vision Senior Living’s villages are quite different” – invites a positive response.

The common theme with this form of credentialing is that descriptions of new models of retirement villages are specifically detailed, whereas references to traditional models are vague, general concepts, left to the reader to fill in. In all cases, the RVOs clearly rely on readers’ own images and ideas to complete the reading as desired by the RVOs as rhetors, and to identify with implicitly stated organisational values.

Praise by insiders: Residents’ testimonials.

Testimonials are statements that express positive views, attributes, and qualities about people or organisations (Cheney, 1983; Cheney & Tompkins, 1988; DiSanza & Bullis, 1999). In this study, RVOs use testimonials in three ways: (a) in specific *testimonial* brochures (*Dannemora Gardens; Waitakere Gardens*); (b) in *village newsletter* articles (Thoughts from a new resident, 2003); and (c) in *village brochures* (Metlifecare, Primecare, Vision Senior Living). In brochures and webpages, testimonial-type

statements were presented in quotation marks without naming specific residents. For instance:

I used to travel 20 minutes to play club bowls at set times, now I'm playing in the village with my friends and can still go down to the club when it suits me. (Primecare, 2005)

The nicest thing for me is being able to do something different each day. (Primecare, 2005)

Now that I don't have to maintain my lawns and gardens, I have so much time to do the things I enjoy. (Metlifecare, *Experience Metlifecare*, p. 6)

We feel privileged to have had this great opportunity of a great lifestyle and to be able to socialize with the other wonderful residents that have moved in as neighbours. (Vision Senior Living, *Dannemora Gardens*, p. 4)

Each of these statements endorses the RVOs representations of lifestyle and choice discussed earlier in this chapter. However, because they are presented as testimonials, they invite the reader to see that ordinary people express views and positively describe their experiences of retirement village living which in turn reflects positively on the RVOs.

One example (see Figure 6.7) of testimonial uses the rhetorical strategy of finding common ground between rhetor and audience (Burke, 1950/1969; Cheney, 1983; Cheney & Tompkins, 1988; DiSanza & Bullis, 1999). Here, the RVO uses residents' voices to articulate the common negative view of retirement villages, and thereby positively characterise its own current models.

This advertisement uses a narrative spoken by John's wife, Winifred. The speaker is indicated in three ways; firstly, by the quotation marks; secondly, by the image of a couple; and thirdly, by the phrase "our really good friends" which suggests the speaker is related to John and is the other person in the photograph.

The narrative is structured by John's actions. The first and second key statements are metaphors of resistance – and notably spoken in the

THE EASTERN SUBURBS' PREMIER RETIREMENT RESORT



Winifred & John Copping

'John wasn't going to have a bar of retirement villages!'

"Mention 'retirement village' and John would've run a mile once. That is until our really good friends Brenda and Paul visited a VSL village, and couldn't stop talking about it.

"Now John is only too eager to enthuse about the benefits of living at Dannemora Gardens ... the social life and companionship are great and there are regular group trips to the local cinemas, the latest shows in the city and a variety of other outings. Shops of all kinds just down the road at Botany Town Centre and The Hub. As well as heaps of cafes and restaurants and other amenities.

"What's more, we've formed some truly warm friendships at Dannemora Gardens... and we really look forward to Friday evening Happy Hour or sharing a meal together at the village restaurant."

The Perfect Retirement Address "We can assure you the good life here has changed John's ideas on retirement villages."

30 MATARANGI ROAD (OFF HAVEN DRIVE), BOTANY DOWNS
PHONE 272 2467, www.dannemoragardens.co.nz

VSL A VISION SENIOR LIVING COMMUNITY
Applications to be made on the investment statement available at the sales office.

DANNEMORA GARDENS

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Figure 6.7: Example of an advertisement establishing common ground through residents' testimonial (Vision Senior Living, 2004a).

past tense: “John wasn’t going to have a bar of retirement villages” and “would’ve run a mile”. The third key statement moves to the present tense; it uses a nicely assonant phrase “eager to enthuse” to describe John’s changed attitude and is therefore positively characterised in sound as well as in meaning. The final statement holds that the “good life” – and by association the RVO itself – is responsible for the changes in John’s ideas about retirement villages.

This advertisement relies on leveraging held ideas of old age homes which are signalled in the euphemistic term “retirement homes”. Yet, the common ground of the dislike of traditionally-conceived retirement villages is very much implied rather than explicitly stated. This particular example also demonstrates another common rhetorical tactic: the use of strategic ambiguity (Eisenberg, 1984). Ambiguity is where meaning is uncertain, but can be actively *fostered* in texts (Burke, 1945/1969; Cheney & Tompkins, 1988). For example, *value* terms used in organisational mission statements are often vague so that stakeholders can read their own understandings and preferences into the statement (Eisenberg, 1984). The exact nature of what John did not like about retirement villages is never stated. However, John’s ideas about retirement villages can be inferred to be negative through the positive characterisation of his current retirement village life. This may be termed the *preferred* reading (Hall, 1993; Foss, 2004; Locke, 2004): that is, while open to interpretation because of lack of specific details, the text creates sufficient “space” for readers to create their own reasons for “not having a bar of retirement villages”. The aim is to induce readers to think *differently* about retirement village living – *just like* John.

Finally, linking the readers and RVO through residents’ testimonials may reinforce the depth of common ground across the three groups. On the other hand, however, the residents speaking here may be viewed as actors “in the Hollywood sense” (Crabbe, 1990, p. 120) who simply speak lines written by and representing the interests of the RVO.

From this perspective, the RVO is the real or “Burkean” actor; that is the actor as agent with agency that remains behind the scenes, while the resident is the puppet of the organisation or “merely an agency in Burke’s sense” (Crabbe, 1990, p. 120). However, such a view denies both the reality of the lived experience and agency of the residents. It also denies the potential for there to be genuine alignment between the RVO and residents.

The value of insiders’ testimonials is not only that they present overt messages that prospective residents may identify with, but also that they convey subtle messages about residents’ values, attitudes, and relationships with RVOs, *and their identification with organisational values*. That is, residents’ testimonials use the common ground as inducements to readers to participate in new retirement lifestyles. However, in so doing, residents’ testimonials also demonstrate residents’ *acceptance* of the RVO role in achieving such lifestyles.

Recognition by outsiders: Prestige.

RVOs’ claim leadership through their commitment to design, construction, and service standards, and one strategy used to provide evidence of quality is through praise from industry outsiders (see Burke, 1969; Cheney, 1983; Cheney & Tompkins, 1988; DiSanza & Bullis, 1999). For example, two RVOs mention awards received for design:

Three time winners of the Australasian Aged Care Housing Awards for “Best Retirement Village in New Zealand”. (Ryman Healthcare, *Hilda Ross Retirement Village*, p. 3, Rita Angus Retirement Village, p. 3)

Forest Lake Gardens was selected as New Zealand’s best new retirement village of 2003 at a conference in Australia at the beginning of November. (*An award winning village*, 2003)

In citing awards that recognise the RVOs’ ability to meet standards set by outsiders, the RVOs validate their claims to industry leadership and cement differences from the traditional models of aged-care. In addition, by naming artefacts such as awards for design, RVOs also suggest

organisational values associated with innovation and prestige. Thus, third-party endorsements help to suggest identification with RVO values and therefore validate RVO claims to being credible and trustworthy.

RVOs' Expressed Values

Leadership seems to be the most common value expressed and usually in association with *expertise and experience* in the industry and *prestige*. However, another central value also features: *innovation*. The core characteristics of innovation include creativity and intentionality of benefit (Amabile, 1988; Levy & Merry, 1986; West & Farr, 1990). RVOs claim innovation in their *interpretation of the business environment* and in *development of products*, and *provision of services*.

With regard to interpretation of the business environment Vision Senior Living (2004–2005) represents itself as a credible and innovative organisation because (a) it operates in a viable market (the trends say so), and (b) because it has “done its homework” with research on demographic and social trends. Secondly, Vision Senior Living claims to be an innovative organisation because of the *intentionality of benefit* of its product for residents combined with its organisational *creativity*. To illustrate, consider the following excerpts from this brochure:

As far back as 1996, the founding directors of Vision Senior Living had already started to appreciate the trends were going to bring extraordinary growth to the “retirement industry”.

Perhaps the greatest breakthrough in Vision Senior Living’s attitude to retirement living came the realisation that villages could be built which were to all intents and purposes “resorts”.

The company conceived retirement communities that could boast the recreation, leisure and social facilities that characterised the resorts where many of us escaped for an annual holiday. (Vision Senior Living, 2004–2005, p. 4–5)

In using the phrase “as far back as” Vision Senior Living implies that this was a long time ago and *a period in which no one else in the retirement village sector was thinking that way*. It also implies that Vision

Senior Living had “foresight” – a seemingly unusual talent for an RVO at the time. The nouns “breakthrough” and “realisation” along with the verb “conceived” also signal new creations and therefore innovative thinking. Intentionality of benefit is indicated by the retirement village facilities that are characteristic of resorts and significantly, “where many of us escaped for an annual holiday”. The holiday approach to retirement village living is the innovation, and holidays in Western society, are inherently beneficial. Therefore, when used in association with retirement villages, the implication is that retirement village living is beneficial to residents.

In this context Vision Senior Living’s claim to be a “major force in the retirement industry” (2004–2005, p. 1) rides on the combination of two ideas: firstly, its timely entry to the industry eight years ago and secondly, its “new and innovative” approach to retirement villages. However, these claims to innovation are also underpinned by a discourse of determinism. This discourse focuses on the impact of demographic changes on the retirement village sector. Determinism says that with the increasing numbers, and increasing longevity of people over the age of 65-years, the sector must grow. There is an air of inevitability about the growth of retirement villages in relation to the increasing numbers of people over 65-years. Consider the following excerpt from Ryman Healthcare’s (2004b) website which also demonstrates this discourse in action. While not specifically targeting potential residents, this material was freely available on the webpage and easily accessible to any web-browsing prospective resident.

In the last year, Ryman has constructed a new village in Napier, purchased a site in Wanganui, and announced the expansion to the Shona McFarlane Village in Wellington.

Ryman managing director Kevin Hickman said Ryman now has a landbank sufficient to provide a further 940 retirement village units and 427 rest home / hospital beds.

The demographics are in our favour, confirming there is a market for our product. Statistics New Zealand figures show the number of people over 65-years growing from 450,000 in 2001 to 924,000 by 2026. (Ryman Healthcare, 2004b)

The excerpt begins with a list of significant purchases and proposed developments. The second paragraph refers to its assets as a “landbank” and capacity to provide accommodation facilities as “units” and “beds”. Economic discourse clearly informs this framing. Moreover, the explicit link between demographic changes and a “market for our product” shows economic determinism to be an important driver for growth in Ryman Healthcare. Benefit is implied by Ryman Healthcare’s capacity to meet the demand for “beds”.

While innovation is the claim, the RVOs also “hedged their bets” by using demographic information and deterministic discourse to assure the reader that innovation or not, growth was assured.

RVOs’ Relationships with Residents

There appear to be three core themes in RVOs’ expressions of relationships with residents. First is RVO *representations of management* roles in relation to residents. The second theme concerns RVO *representations of residents*, their roles and needs, and the third is the *expression of assumed shared values*, perspectives, or interests. I begin with exploring the ways in which RVOs presented management roles. The following examples demonstrate ways in which RVOs emphasise service roles in their relationships with residents:

Our senior management team is *immersed* in our Villages. In fact you will find their offices spread around our various villages. This means they come into *contact with residents* like you each and everyday. (Vision Senior Living, *The company behind your perfect retirement address*, p. 1, emphasis added)

Our *success is dependent* on the happiness and wellbeing of all our residents, which is why we constantly *reinvest* in our villages to offer better and more enriching experiences. (Metlifecare, *Experience Metlifecare*, p. 2, emphasis added)

The Manager of Ocean Shores has been selected to *guide, assist and above all care*. The Manager will ensure that the privacy and

independence of residents is *safeguarded*. (Primecare, *Ocean Shores*, p. 5, emphasis added)

In each of these examples, the relationship between RVO and resident is portrayed as *integrated*. Vision Senior Living, in its use of verbs such as “immersed” and “contact” and pronouns as in “like you”, implies informality and personalises the retirement village environment. Vision Senior Living also implies that the organisation is responsive to residents’ because staff members are in contact with residents.

The Metlifecare text highlights the mutual interconnectedness between resident and organisation with the claim that “our success is dependent on . . . all our residents”. Interestingly, resident “wellbeing” rather than health is foregrounded.

Finally the Primecare excerpt stresses that the role of the Manager is “to . . . above all care” and “safeguard” residents’ independence. This is a contradiction: safeguarding is protecting and implies authority. On the other hand, independence implies freedom from control or authority. That Primecare suggests that residents’ independence needs protecting suggests that the underlying assumption is that older people are generally *dependent*. However in spite (or because) of this position, Primecare, like Vision Senior Living and Metlifecare, promotes close customer-focused relationships, where the RVO is in *service* to the residents.

The underlying discourse is market-oriented and this is important when considered against the history of the aged-care sector dominated by religious and welfare charitable trusts. Care was once about *caring for* people in need. Within retirement villages, however, care is presented as *caring about* residents and enabling them to live their desired lives *through supportive and resident-focused relationships with RVOs*. This subtle shift in orientation appears to give residents more agency than was assumed within medicalised models of residential living for older people.

RVO representations of residents' rights and roles.

Of particular note is the way in which discourses of customer service and in particular hospitality shift the focus from "old age" care to "New Age" retirement village living. Consider the following example which reveals connections between economics, business, and customer focus:

We believe that all our residents, as investors in our developments, should be offered everyday courtesy, respect and willing support from management and staff. (Vision Senior Living, *The company behind your perfect retirement address*, p. 1)

This excerpt from Vision Senior Living emphasises residents' rights to expect a certain kind of relationship with staff. These rights are based on residents being "investors" and thus the claim is firmly located within market-oriented discourse. This is in stark contrast to the traditional focus on the "needy" and the "deserving poor" (Saville-Smith, 1993; Tennant, 1989) who like "patients", were often passive participants in relationship with service providers. So, the new model of retirement village living not only advocates close working relationships between residents and management (as illustrated above), but also posits that this is *a right that residents can expect and RVOs expect to fulfil*. Consider the following examples:

We aim to ensure that our residents are able to be part of the wider community in which they live. (Vision Senior Living, *The Company Behind Your Perfect Retirement Address*, p. 1)

You'll be encouraged to be involved in the daily village operation and enjoy immediate and regular access to village management. (Guardian Healthcare, *Winara Village*, p. 3)

The first excerpt from Vision Senior Living emphasises that residents will maintain community relationships beyond the village, and that the RVO will enable this to happen. In so doing, the RVO leverages shadow discourses of historical aged-care where the opposite occurred.

The second excerpt explicitly states that residents will be “encouraged to be involved in the daily operation” which elevates residents from *residing* in the village to *participating* in the village. In these cases, the RVO stresses that residents have membership of broader communities, as well as the opportunity to be involved in village operations. It also acknowledges that residents do more than simply reside in retirement villages. While the first theme is common across the promotional material, specific references to residents’ participation in management were few. The one from Guardian Healthcare is the most explicit with others (Vision Senior Living, *The company behind your perfect retirement address*; Primecare, *Ocean Shores*) being more implicit.

Rights to involvement in wider community life are to be expected when compared to historical models of aged-care. At first glance, there appears to be a contradiction between this position of older people, and RVO representations of older people as permanently on holiday. However, both are possible. The representations of *holiday* tend to operate as *attraction* by offering a different kind of lived experience. On the other hand, these new rights and roles also operate as *assurance* factors that allow residents to continue with their existing lives (unlike old age homes). The most significant aspect of these excerpts is that they suggest new positions for residents. The first Vision Senior Living excerpt positions residents as *investors* and therefore entitled to “courtesy”, “respect”, and “support” from employees. The one from Guardian Healthcare with its direct invitation for residents to participate in the “daily village operation” elevates the resident to *participant* rather than *recipient* of RVO products and services.

Expressions of assumed shared values, perspectives, and interests.

This section addresses the ways in which RVOs espouse values assumed to be shared with readers. The significance of establishing shared values is that they are another aspect of RVO discourse that prospective residents may identify with.

The use of the assumed “we” (Burke, 1950/1969; Cheney 1983; Cheney & Tompkins, 1988; DiSanza & Bullis, 1999) includes the reader as part of the speaker’s world. In this study, the RVOs central purpose is to connect the reader or audience with RVO articulated values.

The first example of the use of assumed connection occurs with the reference to personal values; Vision Senior Living (*Waitakere Gardens*) claims that “most of us relish our independence”. This is a direct appeal to the reader’s sense of agency and assumes the reader will agree. The open-ended meaning of “independence” is in itself ambiguous and allows multiple interpretations by different audiences. This openness establishes reader receptiveness for the RVO’s subsequent “pitch” about retirement village living. The progressive form of the message sets a tone that puts the reader “into a state of mind which another state of mind can appropriately follow” (Burke, 1968, p. 124-25).

The second example of the “assumed we” demonstrates alignment of attitudes; Metlifecare’s (*Metlifecare Experience*) claims “This is the retirement lifestyle most of us dream about” (p. 2). The non-specific “this” refers generally to retirement village living and Metlifecare villages in particular. The “us” includes both the RVO and the reader and assumes some level of commonality about attitudes towards retirement. Another example in a similar vein is Primecare’s (*Your 5 best retirement options*) “We thought of retirement . . . and chose a new lifestyle instead”. Here “we” identifies the organisation’s stance, while the message invites the reader to be part of the “we”. The subtext is that “retirement” is not for Primecare, nor the reader, and therefore they have something in common. By using “us” and “we” in this way, the RVOs include the reader and themselves in a *like-minded* group. Thus, having something in common, *we* (the organisation) and *you* (the potential resident) become *us* (the retirement village).

At least two, if not three forms of identification-induction may be seen to be represented here. The *first* is the expression of sentiments

shared by the RVOs and their target audience, and identification functions as a means to an end (Foss et al., 2002). In this case, “in so far as their interests are joined, A is *identified* with B” (Burke, 1950/1969, p. 20, original emphasis) and persuasion to buy the product (or at least enquire about it) is achieved.

The *second* identification-induction tool is identification by antithesis (Burke, 1950/1969; Cheney, 1983; Cheney & Tompkins, 1988; DiSanza & Bullis, 1999; Meisenbach & McMillan, 2006) where a common “enemy” is used to align groups. However, the “enemy” is hidden here and implicit rather than explicit. The hidden enemy is traditional forms of retirement and old age. This leads to possibility of the *third* type of identification which “derives from situations in which it goes unnoticed” (Burke, 1972, p. 28). Indirect forms may induce unconscious persuasion in that audiences may not be aware of the identifications they are making (Burke, cited in Foss et al., 2002). In the texts direct references to traditional forms of retirement are absent, yet also hinted in statements such as, “We thought of retirement . . . and chose a new lifestyle instead”. By leveraging such fears and images of traditionally and negatively conceived older age and retirement in seemingly unobtrusive rhetorical messages, RVOs not only put themselves in a strong position to persuade target audiences, they also help to perpetuate myths of negative ageing.

Another rhetorical tool is the use of the pronouns “you” and “your” where the RVOs speak directly to the reader. These pronouns appear particularly when the RVO connects the reader with the design or service features of the village. For instance:

We have on offer a broad range of floor plans and apartment style. You’ll be sure to find a home that matches your budget and lifestyle needs. . . . choose from colour schemes and finishes which complement the architecture and allow your personality to shine in your own home. (Vision Senior Living, *Dannemora Gardens*, p. 5)

Here the focus is on choice and how the retirement village design, and in particular the resident's home, can help the individual residents to be themselves. The RVO links values associated with *choice* and expressions of *individuality* to home design, and thus leverages discourses of identity and consumption. The *direct appeal* through the form "you" connects with audience self-images and identity-constructs such as, "discerning buyers", "tasteful shoppers", "design conscious", or "stylish individuals".

In addition, the *form* in combination with the *content* creates expectations (and acceptance) about what will happen next (Burke, 1968; Foss et al., 2002). In terms of content, these messages draw on discourses associated with positive ageing which encourage community participation and endorse their skills, knowledge, and experience (Dyson, 2004). Thus, the direct appeal to "you" (the form) combined with identification with specific messages (content) help to make the what-happens-next (i.e., to buy a place in the village) a natural and "rightful" event (see Burke, 1968).

Summary of RVO Representations of RVOs

Self-promotion of the RVOs seems to involve three central identification inducement strategies: claiming credentials, espousing values, and positioning residents in an almost-partnership relationship with RVOs. Market discourses underpin these strategies in that success is demonstrated by business achievements and customer-focused relationships.

RVOs claim credentials based on growth, length of time in the retirement village sector, and size, number, and locations of the facilities. Also, third-party endorsements (i.e., awards) help to validate RVO claims of being credible and trustworthy and support espoused organisational values associated with these achievements: values that include experience, expertise, innovation, and prestige. In comparing themselves with traditional models of aged-care, RVOs provide detailed descriptions of

facilities and services, whereas references to traditional models rely on readers' negative images and ideas to complete the reading desired by the RVOs as rhetors. Thus, in addition to market discourses, those of negative ageing underpin RVO self-promotion strategies.

In the domain of relationships, RVOs use residents' testimonials to deepen common ground between RVOs and the reader audience. Insiders' testimonials present overt messages that prospective residents can directly identify with, but they also convey more subtle messages about resident-RVO relationships that act as inducements for identification. That is, residents' testimonials demonstrate residents' *acceptance* of the RVO role in assisting individuals to live leisured, active, and secure lifestyles. Therefore, the ways in which the RVO presents itself is an important factor in promotional communication.

Personalised messages using pronouns and the "assumed we" invite prospective residents to identify with values associated with expressions of *choice* and *individuality* achieved through home design. This approach leverages discourses of identity and consumption. Market discourse also infuses RVOs promotion of relationships with residents as shown in the *customer-focused* message.

Although some contradictions are evident here in the RVO-resident relationship (e.g., "safeguarding residents' independence"), the overall message is that the RVOs' roles in the relationship are to enable and ensure residents get what they want in terms of lifestyle. This seems to indicate a shift in organisational orientation which gives residents more agency than is assumed by medicalised models of residential living for older people – which, within market discourses, residents as customers could rightly expect. Moreover, the promotion of close working relationships between management and residents seems to endorse the view that this is *a right that residents can expect, and that RVOs expect to fulfil*. While direct invitations to prospective residents are few, even the implied messages to residents to participate in the "daily village operation" elevate

the resident to *participant* rather than *recipient* of RVO products and services.

Summary and Conclusion

In terms of participation RVOs' specific language use seems to control meanings about residents' participation. The corporate promotional material examined here constructs residents' participation as activity and leisure pursuits by co-opting discourses of active and positive ageing and retirement-as-leisure lifestyle. Also, RVOs construct themselves as playing a significant role in *enabling* residents to participate in this lifestyle by providing the necessary environment. However, the promotional material additionally positions the resident in an active relationship with RVO management and employees.

Overall, the brochures for potential residents aim to *minimise* associations between *retirement* and retirement village living and *maximise* associations between *lifestyle* and retirement village living. The shift from *retirement* to *lifestyle* appears to be a form of inducement that is infused with historical notions of old age homes as well as current discourses of consumption. It also seems that RVOs use lifestyle discourse to invite potential residents to join not only a lifestyle, but also a relationship with the RVO. This suggests that residents are more than purchasers of RVO products. *The combination of active and retreatist leisure lifestyle and the resort style environment frames participation as a partnership in the production of the product: the village itself.* The RVOs provide the structural and physical environment and residents live the *preferred* retirement lifestyle. This message combined with other messages about management-resident relationships further supports this finding.

Finally, in terms of participation, RVOs frame retirement village living in ways that create ideas and boundaries about what is acceptable residents' participation. RVOs' representations offer lifestyle *benefits* to residents while implying there is a *partnership* relation between the RVO

and residents. In these ways RVOs influence expectations of residents' participation in RVOs.

In some ways, and from a critical perspective, this seems similar to earlier structures which systematically excluded older people from meaningful social and economic life. However, in order to assess the extent to which marketisation has changed this, it is useful to explore insiders' – both residents' and employees' – expectations, expressions and experiences of residents' participation. These areas are the focus of the next three chapters (7, 8, and 9). The first of these chapters examines the lived experience of retirement village residents as expressed through their understandings of *community*. These are compared with outsiders' (non-residents who are over 55-years) perspectives on retirement villages as *community* as well as with those of other insiders – retirement village employees.

CHAPTER 7

STANDPOINTS ON RVOS AS “COMMUNITY”

Introduction

A key theme to emerge from the analysis of employee interviews, residents’ and non-residents’ focus groups concerned the different viewpoints on community. These differences were central to understanding both attraction and resistance to retirement villages. Overall, *insiders* – residents and employees – tended to positively characterise the retirement village community. On the other hand, *outsiders* – non-residents aged 55-years and over – tended to portray retirement villages negatively as either segregated or incomplete communities. At the same time, RVOs as *organisations that produce villages that promise community* seemed to exhibit and simultaneously challenge common ideas and expectations about *belonging*.

The challenges experienced by retirement village residents and older people in claiming, creating, and maintaining a sense of community raised issues about residents’ participation in RVOs. Moreover, as argued elsewhere, in-depth understanding of participation can only be achieved through examining trends external to the organisation itself (Cheney, 1995, 1999; Cheney & Cloud, 2006). Therefore, the purpose of this chapter is to explore RVO insiders’ (residents and employees) and outsiders’ (non-residents) experiences of community with reference to wider societal contexts. This will establish a foundation for assessing the implications of community and organisation for residents’ participation in RVOs.

The chapter is structured in three sections. The *first* section outlines descriptions and dimensions of organisation and community. The *second* examines outsiders’ (non-residents over 55-years) and insiders’ (residents and employees) views on community. The *final* section explores

similarities, differences, and tensions between residents' and employees' (insiders') ideas about RVO membership roles.

Organisation in 21st century Western society

As discussed in Chapter 4, the role of organisations in work and private lives has undergone major changes in the last century. In addition to being change agents in modern society, organisations provide identity and meaning for members and other stakeholders (Cheney, 1991; Deetz, 1992; Weick, 1995). The term *identity* is commonly used to *represent* an individual or group, whereas *identification* is the process by which identity is *appropriated* (Cheney, 1991, p. 19). Identity encompasses the claimed self-concepts of an individual or group, as well as how they are represented.

In addition to constructing the self as different from others, identification can involve the taking on of others' identity claims: that is, becoming like them. As mentioned previously, Burke (1937/1984) states that it is "*natural*" (p. 140, original emphasis) for someone to identify with his or her employing organisation. Therefore, in terms of an organisation, the process of identification involves individual members and the corporate body simultaneously (a) claiming particular self-concepts; (b) identifying with (significant) others' identity claims; and (c) inviting (significant) others to identify with and ratify self-identity claims (Cheney, Christensen, Zorn et. al., 2004; Weick, 1995). However, while individuals may "take the cue for their identity from others . . . they make an *active effort to influence* this conduct to begin with" (Weick, 1995, p. 23, emphasis added). Thus identification is a reciprocal process of claiming and maintaining self-concepts, and seeking confirmation of those self-concepts from significant others – including organisations.

Organisations claim and promote their own identities and individual stakeholders may seek to align their own self-concepts with, or distance them from, the organisation. In this way then, an employee may not only act on behalf of the organisation; he or she may be seen to act *as* the organisation (Weick, 1995). With respect to RVOs, residents on the one

hand may identify with *corporate* identity claims, and on the other hand, simultaneously identify with the village *community* as a separate although related entity. In addition, residents may seek to claim and maintain a positive self-concept and therefore will seek to influence outsiders' views of retirement villages and of their residents. In the light of this, residents' responses to the oft-asked question "How can you live in a place like that?" affect RVOs as well as the individuals involved (see Weick, 1995).

When Smircich and Stubbart (1985) define organisation as "a set of people who share many beliefs, values, and assumptions that encourage them to make mutually-reinforcing interpretations of their own and others' acts" (p. 727), they support the idea of *identification* of members with each other as well as the organisation with which they associate. However, unlike social institutions of family and community which offer primary life-world identity and meaning, corporate organisations produce secondary meanings centred on personal interests and organisational gains (Deetz, 1992). The traditional family and community nurture individuals in mutually responsible relationships of contribution, participation, and reciprocity. Organisations, on the other hand, set the rules for roles and contributions from different stakeholders. In the case of employees, they "are treated fairly within the rules, but they have no say in establishing the rules" (Deetz, 1992, p. 54).

To say that employees "have no say in establishing the rules" may seem extreme, but not when considered within the context of the overall *patterns* of organisational communication. For instance, workers' unions help negotiate conditions and rules of employment, but within established and accepted participatory domains. Others would argue (Cooren, 2004; Cooren & Fairhurst, in press; Hardy & Clegg, 1999; McPhee 1985) that there are many situations where organisational decisions become part of the accepted and unquestioned structures and procedures that guide organisational communication.

As corporate organisations, RVOs provide lifestyle living for one group of stakeholders and paid employment for another. This situation has implications for understandings of *community* because the product produced by the organisation is a retirement community. Residents *live with* rather than *work for* the RVO, and their lives are interconnected in various ways with paid RVO employees. This situation poses questions about the potential for tensions between member identity claims and organisational identification. Residents may identify with the RVO as integral to, and inseparable from, the community in which they live; whereas, employees may view the village as separate from the organisation which they serve.

In summary, organisations as a social phenomenon influence the ways in which society deals with issues of the lived world. Organisations provide meaning and identity in a social world increasingly dominated by the organisational experience. When organisation meets community in the form of the retirement village product, there are implications for resident and employee roles and identification as well as for community itself. Within the context of RVOs, meanings of organisation and community have special relevance to residents and employees as co-existing producers of the product which is the village. I now turn my attention to dimensions of community.

Community

As introduced in Chapter 4, retirement villages may be considered to be neighbourhoods in that they are *limited territories* where people live and *interact* (Chaskin, 1997). Similarly, from a communication perspective, community may be thought of as a *field of interaction* (Warren, 1978; Wilkinson, 1991): That is, a clustered *interaction* of people living and/or working in a restricted *geographical* area (Warren, 1978, p. 409). In short, the concepts of *interaction* and *field* seem to be relevant to retirement villages as communities. However, in order to inform the data analysis a

little more, I explore the concept of community in more depth while keeping these ideas in mind.

Community is a contested term and one of the most widely used in society today (Selnik, 1992). Broadly conceived, community is considered as a value, a central concept in the history of sociological analysis, a societal unit, and a form of organisation. As with any organisation, the structures and processes are communication mechanisms (McPhee, 1985) that assist a community to achieve members' individual and collective goals (Wharf-Higgins, 1999). However, in contrast with organisation, community does not necessarily imply authority or formal relationships, and in fact readily suggests social bonds and intimacy.

The concept of community is open to different interpretations depending on whether perspectives are internal or external, and whether using empirical or value-oriented criteria. Building on the broad features of community given above, community has been described as "people who live within a *geographically defined area* and . . . have *social and psychological ties* with each other and with the place where they live" (Mattessich & Monsey, 1997, p. 6, original emphasis). The social ties suggest interaction, shared interests, and largely face-to-face communication (see Brint, 2001). There are also other types of community where geographical location, or even face-to-face communication for some, may not always feature; communities of kin, faith, identity, interest, profession, and virtual connections (Brint, 2001; Mattessich & Monsey, 1997). Mattessich and Monsey's definition of community seems appropriate for retirement villages as fields of interaction because it captures the empirical reality of location as well as values associated with a sense of belonging.

Lifestyle enclave is another community concept and centres on consumption and leisure activities (Bellah et al., 1985; Simonson, 1996). For this reason, retirement villages as locations of consumption (Mansvelt, 2000a) may be considered to be a form of lifestyle enclave. However, there

are key differences between this form of community and those discussed above. Although residents may be a homogenous group in terms of their interests and activities, members of a lifestyle enclave are not interdependent, nor do they act politically together (Bellah et al.). Thus, lifestyle enclave fails to take account of the notion of *place* and members' engagement with it; place and space are features of community and communication. As Vale (1995) writes, "The built environment still matters, in large part because of what it communicates to people who they are and how they fit in with others in the world" (p. 659). Vale argues that physical design has both symbolic and practical meaning, and that the built environment – design, form, place, architecture – remains significant because of its associations with power and status; those in power build in order to segregate the more powerful from the less powerful. In this respect, retirement villages are both physical and symbolic representations of the more powerful because only those who can afford to live there. Moreover, Vale says that the interactions between those who build, those who resist, and representations in media help to construct and reconstruct interpretations of the observed and lived community. Thus, the retirement village as a built environment is more than a lifestyle enclave and communicates with non-members as well as members of that environment.

Community has been defined, described, and categorised with various typologies (e.g., Brint, 2001; Hillery, 1955; Mattessich & Monsey, 1997; Warren, 1978). However, in broad terms, community may be thought of as a *value* and a *descriptor* of communication processes, behaviours, and events (Plant, 1974). Community is both empirically descriptive of a social structure and normatively toned – that is, there are expectations about what community *should* be both in structure and in values. Community "refers to both the *unit of society* as it is and to the *aspects of that unit that are valued if they exist and desired in their absence*" (Minar and Greer cited in Plant, 1974, p. 13, my emphasis). Community

could equally be defined as (an) organisation: that is, (as presented above), “a set of people who share many beliefs, values, and assumptions that encourage them to make mutually-reinforcing interpretations of their own and others’ acts” (Smircich & Stubbart’s, 1985, p. 727). However, community is an exalted term, as compared with the term organisation, and has an air of inspiration. This is why it is used to elevate the activities of a group or organisation.

Community has directly observable features as well as values associated with the idea of community. In addition to geographical locality, structural features may include the central *function* of the community. Common interests such as jobs, workplace, hobbies, projects, needs, or beliefs (Brint, 2001; Plant, 1974) make for functional communities. Retirement villages may be viewed as both functional and geographically-based communities: That is, they are usually identifiable and sign-posted in location and promotional material often includes references to “like-minded people” as in “enjoy the . . . companionship of like-minded people” (Vision Senior Living, *Dannemora Gardens*, p. 1.). The label *like-minded* implies some sense of connection, shared interests, or common ground.

Significantly, community membership is about relationships and identification and therefore, is about the *self-defining* features of community. Member interaction and participation in collectivities create and maintain community (Mattessich & Monsey, 1997; Plant, 1974; Warren, 1978; Wharf-Higgins, 1999; Wilkinson, 1991). Outsiders (i.e. non-members) cannot define a community other than in an empirical sense: that is, a description of function or locality. For example, representatives of an RVO may define retirement village residents as a “community of older people” or a “community of individuals in receipt of our services”. However, the residents may not see themselves in this way, and therefore may not identify with this community. They may see themselves as users of the service, but not members of the RVO-defined community. It is only

when individuals identify with others of common interest and relate to each other that the desired aspects of community are present (Wharf-Higgins, 1999).

In this organisational age, RVOs are *organisations* that produce *community* as a *commodity* to be bought and sold. Therefore, the different ideas expressed by organisational insiders (employees and residents as co-producers of community) and outsiders about retirement villages as community are explored next.

“Community” the Term: Uses by Insiders and Outsiders

In order to examine the uses of the term “community” by the different participant groups, I began from a deductive position, by undertaking an initial search for the key term “community” in employee interview and resident focus group transcripts. I then used a proximity search to identify other references to these direct uses of the term, explore the topical contexts in which the term was used, and locate “what went with what” (Burke, 1941/1973; Cheney & Tompkins, 1988; Foss, 1996, 2004).

The term “community” was used explicitly by residents, non-residents, village staff, and senior managers but with different levels of frequency. In employee interviews the term was used between 1 and 20 times was per interview; senior employees tended to use the term more frequently (mostly between 7 and 10 times) than village employees (mostly between 1 and 3 times). The term appeared less frequently in the non-residents’ focus groups (between 4 and 5 times each) than the residents’ focus groups (between 7 and 8 times each). In addition, the ways in which the different participants, residents, non-residents, and staff, used the term varied. The term community was used as a noun to describe general society as in “the wider community”, “go out in the community”, “of value to the community”, and “local community”. The term was also used to express values associated with connections between people as in “community is a sense of belonging”, “community feel and

spirit”, and “having community”. Furthermore, participants sometimes talked about community as part of the ongoing discussion without directly using the term. The next section explores specific aspects of community as expressed by both retirement village insiders and outsiders.

Views on Retirement Villages: Outsiders and Insiders

This part of the chapter is structured around four concerns for outsider-non-residents: that retirement villages (a) are not “real” community and (b) enact rules that restrict residents who (c) are wealthy and (d) old. Each of these concerns is discussed first from the outsiders’ perspectives and then from insiders’ (mostly residents’) perspectives. The main reason for starting with non-residents’ perspectives on retirement villages is that this is where many people (including me) are positioned in relation to retirement villages: on the “outside” with mediated experiences of retirement villages. As outsiders, non-residents’ views reveal stereotypical ideas about ageing, oldness, retirement, and retirement villages. Moving from where most people “are at” to insiders’ understandings of retirement village living as community, facilitates connections between outsiders’ and insiders’ views, and helps to identify similarities, differences, and contradictions inherent in their respective claims about retirement village living.

Segregated Communities or Finding Community?

Non-residents: Outsiders.

The idea of retirement villages being separate from ordinary society is demonstrated in the language used by non-residents. For instance, as identified by others (Grant & Neilson, 1999) outsiders spoke of friends who moved “in there” and themselves as living “out here” in the community. Events happened *in* the village and not *at* the village. This *in-out* metaphor captures the idea that the retirement village is a defined social arrangement separated from wider society and excluded from normal life. Consider the following excerpts from non-resident focus

groups; both comment on aspects of retirement villages in terms of what they are lacking:

Helen: A good idea it would be, if there was more interaction [of the village] with the [wider] community. You know, if people went to — — to — —, well, play cards, play cards, do whatever, you know.

Ivan: If it [the village] was more open and part of the community . . . (Non-Residents, Focus Group Excerpt 1)

Jane: There's one thing I think you've got to consider, it hasn't been brought up, do you want to go and live in a place where there is no children . . . where there are only oldies like ourselves here . . . do you want to see younger people there as well?

Dick: No, you can't even see animals, there are no animals.

Jane. You can't see young people and you can't be annoyed by children . . . do you want to be in that isolated desert where there are no children?

Chris: Unless it's organised to having children there, yes that it would seem like — — like children were out of this world, that they need to have groups of children singing or communicating with elders. (Non-Residents, Focus Group Excerpt 2)

The comparative phrases "more open" and "more interaction" suggest that these people see retirement villages as closed and insular. The metaphor of "isolated desert" and simile "like children were out of this world" add an emotional quality to the sense of segregation identified by the non-residents. The suggestion to *organise* ways for children to interact with retirement villages reinforces the underlying assumption that retirement villages are artificial forms of community, and that naturally forming diverse communities are the only *real* forms of community. These concerns align with the definition of community as a social structure with aspects "valued if they exist and desired in their absence" (Minar & Greer cited in Plant, 1974, p. 13). Clearly non-residents value integration of retirement village communities with the broader community, and from their external position could observe only segregation.

Residents: Insiders.

Residents' expressions of community differed from non-residents' in two ways. Firstly, narratives of their experiences challenge traditionally-held ideas that values of community belonging and social connection naturally occur in neighbourhoods. Secondly, their expressions of retirement villages as community challenge commonly held views that retirement villages are artificial and segregated communities.

Residents commonly expressed a sense of social connection with not only other members of the village and the village community as a whole, but also with existing social networks within their wider communities. Moreover, their decisions to move to a retirement village were often influenced by factors that indicated an *absence* of desired aspects of community within their existing situations. As identified in other studies (e.g., Grant, 2006; Stimson & McCrea, 2004), health-change was a common precipitating factor for residents choosing retirement village living. However, it was not so much the health factor itself as the expressed *social issues* associated with health change that made people consider retirement village living. Consider each of the following statements from residents. They are poignant reminders of material reality for some older people; however, they all illustrate some of the social realities – and deficits – of “natural” neighbourhood community.

A structural pattern is evident across all of these excerpts. Each begins with (a) an implied or explicit change-event which is then followed by (b) a description of social issues associated with the event; (c) the option(s) considered; and (d) retirement village living as a solution.

I'd had a lot of things happen to me the year before and I found that it was really distressing being on my own in the flat . . . relying on people having to come to me and bring me things or take me out to the doctor or whatever. I mean, I knew that if I came here I could get meals from here [retirement village]. Otherwise you'd have all these people running in and out of your flat, you know, wanting to jack-up meals but everything was a pest. But being here I thought it would be easy. (Rose, Resident, Focus Group Excerpt 3)

Rose highlights change in her opening sentence: she had “a lot of things happen” in the year before she moved to a retirement village. She then moves on to describe the problems associated with the changes, especially her experience of receiving home support which she frames negatively: “relying on people” and “people running in and out”, “jack-up”, and “pest”. This is in contrast to many non-residents’ who *positively* characterised their existing neighbourhood and available support. Rose’s experience expresses at best a sense of inconvenience and at worst a sense of invasion and uncontrollable dependence. The impersonal and distancing phrase “these people” indicates they were not well-known to Rose. She explains later in the focus group that they were volunteers and home-helpers with local social service agencies and health services. “These people” were not part of Rose’s usual social group or network, but instead were part of a formal community support system.

The switch from using the pronouns “I” and “me” in the first part to “you” in the second part of the text parallels the shift at the centre of the text: Rose begins talking about her emotional response and problems of her situation, and then shifts to the options for dealing with it. The significant factor mentioned is that she could get meals at the retirement village. Rose emphasises the *inconvenience* of her flat by framing support from others in negative terms such as “jack-up”, and “pest”. In short, Rose’s health changed in the year previous to her moving to the retirement village. However, it was the inconvenience of arranging, managing, and using support services, which involved volunteers she did not know, that precipitated her move.

Somewhat ironically, Rose chose to move to a village where she had no previous connections. This suggests a desire for a sense of control over her situation; a contract for meal provision from the RVO seems preferable to “relying on people . . . running in and out” of her flat. This issue exhibits shades of personal responsibility discourse: it is better for Rose to *pay* for services than rely on volunteers and (publicly funded)

community services. It seemed better for Rose to move to a retirement village than to carry on experiencing the realities of home support services (i.e., structural issues).

The next three residents also highlight how changes in the physical and social environment motivate individuals to change. However, these participants specifically refer to *societal changes* that influenced their individual decisions. First, here are two examples of neighbourhood that no longer met some individuals' needs:

The flat that I'd bought ten – – you see, ten years ago – a lot of them were owned and lived in, you know, by their owners but the times had changed and people had gone and everything – I was just really amongst a whole sea of Asian students and I couldn't even well understand them and they didn't seem to understand me – it was just hopeless and so I was motivated to get into something different. (Joan, Resident, Focus Group Excerpt 4)

Joan is an 85 year old New Zealand Pākehā who had encountered individual "Asian" persons in her lifetime (e.g., as shopkeepers, neighbours), but not *en masse* in the way that international education had generated a whole new group of immigrants to New Zealand. The sea metaphor thus implies that Joan felt disconnected from her normal life and floating alone in a foreign world. This metaphor combined with her statements about her inability to communicate with the students confirms that she was socially isolated. The adjective "hopeless" suggests she was possibly on the verge of drowning socially (to extend the sea metaphor).

Joan was not alone in talking about demographic changes that impacted on neighbourhood. James also hints at a sense of being cut off socially in his description of neighbourhood living:

We were living . . . in a cul-de-sac at the end of a cul-de-sac at the end of a crescent, at the end of another crescent and by nine o'clock in the morning or even earlier the street was empty. Nothing happened in the street until five o'clock in the afternoon when the parents who were both working had gone to their child carers and picked up the children and brought them home, and all disappeared inside to watch television – so that was the sole activity within the

street was early in the morning and late in the afternoon, otherwise it was classically the deserted village . . . we decided that the time had come to face up to the fact that we needed something more stimulating. (James, Resident, Focus Group Excerpt 5)

His alliterative statement “a cul-de-sac at the end of a cul-de-sac at the end of a crescent at the end of another crescent” mimics the physical and social isolation experienced by James. James’ description of working parents and children coming home to “disappear inside” is a vivid example of societal trends impacting on the role of neighbourhood in creating community. Kathleen, from another focus group, experienced something similar. She said that during the week no-one was home, and on the weekends her neighbours did things as families. As residents of these neighbourhoods, it seems that these older individuals were observers of rather than active participants in their neighbourhood.

The final example of changing neighbourhoods comes from Vic. His issue was not being able to find the kind of house in the right kind of location:

I was a fit, very athletic person even when I was 60. All of a sudden I got diagnosed with a heart problem which shocked me to the earth and really set Liz [wife] in a spin too because I was a rock and all of a sudden was tumbling . . . We were going to get a smaller place that was going to be easy to handle . . . We got some very surprising results – like where we wanted to live there’s no such thing as a small three-bedroom house – they’re five bedrooms and four bathrooms and five garages and anywhere the size of the place that we wanted, was low down and in a little cul-de-sac with paling fences six feet from your windows. And the first place we went into – the land agent took us there and opened the door, we hopped out of the car door, two doors down the road a dog starts barking and carries on barking until we go inside. The moment we came outside, the dog starts barking again. I said “so much for a quiet cul-de-sac”. The next place we went into, the garage of the place next door opened [and] a little tyke came out on a motorised trike – he must have been about four years old – and this noisy thing buzzing around everywhere, and then I happened to look into the garage as it opened and there were about *five* trail bikes stuck in there and I could just imagine (laughter) . . . And then we saw the sign up there for show homes at [name of retirement village]. We’d already had a

look at a couple of retirement villages. I said it was a solution and that's how we started. (Vic, Resident, Focus Group Excerpt 6)

The imagery of the “rock” and “tumbling” metaphors capture the sense of experiencing change and being out of control. Like the previous speakers, Vic identifies structural issues that prevent older people from doing what they want. In this case, Vic and Liz could not buy a home of the *size* they wanted, *where* they wanted. The lack of choice is illustrated in the juxtaposition of the exaggerated descriptions of options: the houses with “*five* bedrooms and *four* bathrooms and *five* garages” followed houses “*low* down and in a *little* cul-de-sac with *paling* fences *six* feet from your windows”. Vic and Liz could choose between large homes and dense, low-cost housing; the quality, smaller home was not available to them in their current neighbourhood.

In short, non-residents expressed the view that retirement villages are artificial communities or not community at all. In contrast, retirement village residents' descriptions of previous living situations suggest that desirable aspects of community were missing for them. Their encounters with structural changes and barriers in community support services, relationships with local neighbours, and housing markets, suggest that for some older people, community in existing social settings is not as available as generally believed. Moreover, at a macro level, the influence of organisation in everyday life (Deetz, 1992) would suggest that choices by property development organisations directly impact on accommodation choices of older people. One notable development in New Zealand is the entry of property development companies into a sector traditionally dominated by health care (previously discussed in Chapter 3).

An alternative explanation, at an individual level, is that residents of retirement villages experienced problems that non-residents had either not experienced, or had not framed as problematic and in need of addressing. A central difference between retirement village residents and

non-residents is that the former experienced problems which they then had to address.

A problem starts from “the existence of a gap, difference, or disparity between the way things are and the way one wants them to be” (Smith, 1988, p. 1491). In addition, to be a problem the “gap” must be difficult to close and important enough to “inspire current or prospective solution activities” (p. 1491). Each of the stories from residents begins with a description of a problem for which the retirement village became the solution. This is not to say that non-residents may not have experienced similar situations, only that they did not frame such situations as big enough problems to warrant solution-generating activity. As Smith notes, “A problem is a relationship of disharmony between reality and one’s preferences, and being a relationship, has no physical existence. Rather, problems are conceptual entities or constructs” (p. 1491). Thus, a given set of circumstances may be constructed as a problem by one person and not another.

Non-residents in general harbour largely stereotypical ideas of retirement villages and reasons for living there. For example, non-residents construct retirement villages as “closed” and “segregated” communities for “old” people. These somewhat shallow views may be explained with reference to engagement with problem-solving as well as assumptions about ageing.

Many residents engaged with retirement villages, because they needed a solution to their experienced disharmony between their realities and their preferences. Non-residents, on the other hand, have no reason to engage with retirement villages, and so retirement villages remain peripheral to their own lives. Residents do not simply justify their choice of retirement living; rather their motivation to engage with retirement villages, their knowledge of them, and their commitment to the choice of retirement village living as a choice, are greater than non-residents. As Weick (1995) writes:

Choosing to act changes what a person knows. . . . Choice imposes value on information . . . When we choose something, we make it good in three different ways: We assemble conventional reasons why it is good, we focus attention on it and discover new attractions, and we spend more time with it, which means we spend less time with other activities and infer that those neglected activities are relatively less attractive. Thus commitment affects sensemaking by focusing attention, uncovering unnoticed features, and imposing value. (p. 159)

In short, residents know more about retirement villages, because (a) they experienced situations that they defined as important problems which (b) motivated them to find out more; and in so doing (c) noticed aspects of retirement village living that helped them to (d) alleviate the problem.

In contrast, it could be said that non-residents focus on stereotypical aspects of retirement villages and aspects of their existing lives to explain their own choices: that is, to stay where they are. Stereotypical views of retirement villages are infused by historical and negative discourses of ageing and old people's homes. Discourses of ageing as a state of decline and old age homes as places of last resort seem to underpin non-residents' expressions about retirement villages. However, such talk also helps to reinforce non-residents' self-concepts about being *opposite* to those who live in retirement villages: not "old" and (still) independent – that is, still "normal". This is not to say that non-residents are wrong; only that their judgements of retirement villages are infused with personally untested, historical, and negative discourses of ageing. Thus, to dismiss residents' accounts as simply *justifying their choices* is to discount choice-making activities by other groups of people in society. Interestingly however, the same historically and negatively infused discourses of ageing also underpin residents' talk about active ageing.

The next section illustrates how framing affects interpretations and choices. In this case, it is how residents and non-residents differently interpret the communicative features of village design and architecture.

*Communicating Rules or Choice?**Non-residents: Outsiders.*

Non-residents' comments concern the potential loss of individual identity and the need to fit in with the up-market image and expectations of retirement village living. This focuses on how retirement village environments communicate village or organisational identity, and ways in which residents and non-residents identify with them. Two core responses emerge from non-residents' views of retirement village design and architecture: (a) that the image of retirement villages is "too flash" for them; and (b) that retirement villages have rules that prevent them from being themselves. These excerpts highlight the assumptions about formal and informal rules about conduct at retirement villages.

Eileen: I'd like to be able to go out in my nightie or something and walk to the clothesline. But, I mean, you couldn't do that at Hilda Ross [retirement village] – it's too flash! (Non-Residents, Focus Group Excerpt 7)

Alison: I like to get around in my old gardening clothes. I couldn't do THAT at Waitakere Gardens [retirement village] – it's like a hotel.

Barbara: You wouldn't have to . . . they do it all for you [laughter].

Alison: But I like to get out in the garden and slop around in old clothes sometimes. (Non-Residents, Focus Group Excerpt 8)

Joyce: If you wanted to come home stinking of fish, because you've been out fishing – well what would happen? I mean, you know . . .

Clarry: Rules.

Joyce: Yes, rules.

Researcher: Why do you think you couldn't you come home stinking of fish?

Joyce: Well, could you?

Clarry: Are you allowed?

Joyce: The place is so posh that you wouldn't be able to.
[Laughter – multiple voices]

Anne: That's exactly how I feel too. . . . If you went to Metlifecare and you were a fisher-person wanting to get out fishing, then maybe they're looking down their noses "here she comes again".
(Non-Residents, Focus Group Excerpt 9)

The adjectival phrases "too flash", "too posh", and the simile "like a hotel" used in association with retirement villages create oppositional relationships with the relaxed dress-codes of "home": for example, "old clothes", "slop around", and "stinking of fish". They reflect non-residents concerns about the control that the physical environment would have over them. They also imply that retirement villages are a sanitised way of living and not "real life" where people get dirty and slop around sometimes. People are expected to behave and dress in certain ways in hotels and "flash" or "posh" places. The metaphorical phrase "looking down their noses" reinforces a concern with social status. In this case, these non-residents are concerned about village members (employee and/or residents) attitudes to anyone who may not fit the image.

Other comments reinforce assumptions about roles and rules of retirement villages. The expressed assumption "they do it all for you", and the questions "could you?" and "are you allowed?" suggest that non-residents see the RVO as being in control and residents as fitting in with RVO rules. The issue for non-residents seems to be a lack of freedom in retirement villages, as interpreted by them through the physical location (e.g., often gated as well as sign-posted) and hotel-like architecture. In this respect, non-residents allude to the organisational dimension of retirement villages: That is, unlike community where members *are* the community (Arnstein, 1969; Brint, 2001; Mattessich & Monsey, 1997; Plant, 1974; Wharf Higgins, 1999), in organisations members have designated roles and rules

established by the organisation (Deetz, 1992). Thus, to outsiders, residents are part of an organisation where they are required to take on a particular role and comply with organisational rules.

This was particularly evident in relation to the images and ideas communicated to non-residents through the design and architecture of retirement villages. As discussed above Vale (1995) argues that interactions between people, the symbols of the physical environment and architecture, and representations in media help to construct and reconstruct interpretations of the observed and lived community. From the outside, non-residents had only the external features of retirement villages to focus on. Thus the hotel and resort qualities of retirement villages are described negatively as constraining individuals to behave in a way that matches the environment: For outsiders, hotels mean formality, whereas for residents they convey relaxation.

Importantly, by their very existence, *retirement villages communicate to non-residents who they are* (Laws, 1995). Non-residents tended to characterise retirement villages as places for “old” people where “rules” inhibit individual expression of identity. By constructing retirement villages as such, non-residents further distance retirement villages from their own lifestyles where they are “independent” and free. Non-residents do not need to fully engage with retirement villages or village residents and so maintain an “othered” relationship, where through identification-by-antithesis (Burke, 1950/1969; Cheney, 1983; Cheney & Tompkins, 1988; DiSanza & Bullis, 1999; Meisenbach & McMillan, 2006) they support their own positive self-concepts of being independent, free, and not “old”. Finally, because of their outsider position, non-residents can only understand retirement villages from externally observable aspects of *community* and *retirement living*. Their use of stereotypes helps to fill in the gaps.

Residents: Insiders.

Interestingly, retirement village residents also construct their lives as *choice-based*—but in different ways. As with non-residents, residents *also* describe retirement villages as “like a holiday resort” and “like living in a hotel”. Yet, the *meaning* for residents is quite different. The following excerpt from a focus group is typical of resident conversations about the nature of their village after looking at a brochure promoting “resort-style living”:

Alma: My son calls this my retirement hotel.

Bill: When I first came in I gave it the name the [location] Hilton.

Alma: Yes, yes.

Bill: But just because it became the [location] Hilton, it doesn't indicate to me resort-style living . . . Well I think that resort-style living is where there are good amenities all around for a holiday-style lifestyle . . . Not here but a resort could be in Tauranga by the beach but not here stuck in the middle of [this location].

Claire: Oh yes.

Don: This place would be the best place in [this location].

Bill: I would agree with that. I mean, I am not knocking the place as a place but as resort-style living . . .

Alma: The fact that we have a gym, we have a heated swimming pool and it's all this great big expanse of everything, it is a wee bit like a resort.

Bill: Queenstown is a resort.

Alma: But in [this location] it isn't?

Elaine: I feel I'm on holiday every day here.

Alma: It's a great holiday camp—hi de hi! [laughter all around]

Fred: When I first talked to my family from overseas about this I said it's just like being in a hotel with friends.

Hear, hear! [multiple voices in support] (Residents, Focus Group Excerpt 10)

While these residents argued over the semantics of corporate representations of resort-style living they seem to agree that retirement village living for them is like being on holiday. Other residents' comments also support these ideas of holidays, hotels, and privilege. The recurring "Hilton" and "hotel" metaphors along with "holiday" convey a sense of departure from a mundane life world. However the "hotel *with friends*" is an extension that reveals an emphasis on relationships beyond the usual short-term holiday-type relationships. The reference to "holiday camp" also suggests interaction, relationships, and friendships between residents.

In short, while the non-residents focused on hotel images and implications for how they *present* themselves, residents emphasised the *relationships* aspects of holiday life. However, non-residents over 55 are not the only ones to suggest that the retirement village design creates expectations for resident conduct. One senior manager had this to say about residents' style of dress in one hotel-like retirement village:

I remember going to [one of our retirement villages] for the first time and I was a little bit surprised at the way the people were dressed, because it didn't really match the surroundings. And that sounds a bit of a funny thing to say, but there were a couple of women with their slippers on and very sort of day-dresses that were the sort of day-dresses you could see anywhere, and yet I walked in and the building just blew me away and I was very conscious that there wasn't a match. I expected them to look like, you know, Caughey-Preston residents who've got their pearls on and their cashmere sweaters and they look very immaculate and these women looked perfectly alright, but they didn't quite match [the surroundings]. (Senior Manager, Interview Excerpt 2)

The term "match" is the anchor for this text because it appears near the beginning, in the middle and at the end of the excerpt and is therefore significant (Cheney & Tompkins, 1988). The issue for the senior manager is the contrast between the standards communicated via the physical environment and the dress standard of residents. Like outsider-non-

residents she makes assumptions about how residents should dress because of the design features of the retirement village. The built environment communicates expectations (Vale, 1995) to this staff member as both insider and outsider, about the residents who live there. Clearly insider-residents felt comfortable in their chosen dress style, because they were visible to outsiders within the village environment. In sum, the built environment communicates differently to outsiders and insiders with outsiders having a more limited view than insiders.

Exclusive Enclaves or Affordable Housing?

Non-residents: Outsiders.

It is generally accepted by residents and non-residents alike, that retirement village living is only available to those with sufficient financial resources. In most cases this meant owning a home prior to purchasing a retirement village dwelling. It is interesting to note the differences and similarities between insider and outsider views. Consider this comment from a non-resident:

When I was [in America] at end of the 70s . . . I was with a very wealthy group of people . . . and they were talking, looking down their noses and talking about all these people moving to these expensive, trendy retirement villages and particularly in Florida. I'd never even heard of the concepts before, but it seemed to be like a class thing in America – it was sort of a middle-class . . . the poor couldn't afford to and the rich didn't want to – they could afford to retain total independence in a mansion . . . it was considered a very, very trendy thing to do, but for the sort of middle income group. (Margaret, Non-Resident, Focus Group Excerpt 11)

This excerpt is noteworthy for its historical perspective on retirement villages in America as largely a middle-class phenomenon. The concept of conspicuous consumption may be one way to explain this: display of wealth through spending has become possible for the general populace, where it was previously the domain of privileged social groups (Gabriel & Lang, 1995; Lee, 2000; Lury, 1996; Schor & Holt, 2000).

Note the metaphorical phrase “talking down their noses” which appears again. This metaphor suggests differences in social status and superior attitudes of one group towards another. Even though retirement villages were “trendy” in 1970s’ America, Margaret saw these wealthy people as being condescending towards the aspirations of the middle classes: that is, middle-class aspirations to live *like* but not *as* those with greater financial resources. The rich had more choices and therefore could “retain total independence in a mansion” – the choice of the noun “mansion” adding weight to her claim. Thus, Margaret makes it clear that the choice to stay out of retirement villages is a matter of financial resources just as much as it is to enter.

The following comments endorse the view that financial resources influence choices about retirement village living:

[Looking at a testimonial type brochure] This lady’s got money though, hasn’t she? She’s got a lot of money, she’s got a holiday house in Taupo, she’s got – – money’s not a problem. (Ellie, Non-Resident, Focus Group Excerpt 12)

Yes, not everybody owns a home that’s worth enough money to sell and buy one of those places. (John, Non-Resident, Focus Group Excerpt 13)

As with the first excerpt these two people comment on the class-based nature of retirement villages. That retirement village living requires financial resources is illustrated in the repetition of the word money, and the emphasis created by increasing phrase length: “got money”, “got a lot of money”, “money’s not a problem”. The final comment makes the point that even if a person owns their own home its value may not enable the owner to buy into a village. Therefore, financial resources remain a key determinant in a person’s capacity to choose retirement village living.

In the light of this, retirement villages are clearly a commodity for sale and purchase. Even though the promotional material (discussed in Chapter 6) purports to sell active and leisured lifestyles, another very real

dimension is the sale and purchase of dwellings within the context of the existing housing market. The central difference between the traditional New Zealand housing market and retirement villages is that in traditional housing, the property developer makes money only on the first sale. An RVO selling retirement village living on the basis of an occupation right agreement (Retirement Villages Act, 2003) should at least break-even on the first sale (Employee Interviews); however, the aim is to profit on each subsequent sale. Therefore it is in RVOs' interests to focus on a well-populated target market. This is supported by employee descriptions of retirement village buyers which are discussed next.

Employees: Insiders.

RVOs' stated marketing strategies support non-residents' expressed ideas about financial status being critical to retirement village living. RVOs *target the middle market* in a given region, and therefore price their retirement village products to be affordable for people in that region. For instance, Auckland real estate is more expensive than the rest of New Zealand, so middle-of-the-road house prices in Auckland are higher than in provincial New Zealand. Consider this statement by a senior manager:

What we talk about is affordable quality. We know we are not up there at the top – that's where the [other RVOs] have got the market. We are definitely targeting middle New Zealand and I think that from our point of view, we are providing them with really good standard of accommodation. For a lot of them, if they get it in the beginning it's probably the only new home they will ever have; you know that happens a lot. (Senior Manager, Interview Excerpt 3)

In contrast to the promotional material discussed in Chapter 6, the focus here is not on *leisure and lifestyle* but rather the *product* and the *market* that the RVOs "target" (a clichéd hunting metaphor). This is demonstrated in the use of key terms such as "affordable quality", "really good standard", "the only new home", and "middle New Zealand".

The statement "the only new home they will ever have" indicates a shift up in accommodation standards from what older people have known

previously. This implies that residents will pay middle-New-Zealand prices for *beyond-middle-class* New Zealand standards. Ironically, this is consistent with Margaret's (above) observation that retirement village living is for those who desire to live *like* the wealthy. Thus, positional or conspicuous consumption (Featherstone, 1991; Gabriel & Lang, 1995; Lury, 1996; Veblen, 1925/2000) seems to underpin RVO representation of residents' identity needs.

The concept of positional consumption is endorsed by the sales strategy promulgated by RVOs: that is, in the practice of offering special deals at various points in their development. For example, sometimes village dwellings are sold at 20-25% below market valuations. This means that residents have money left over after the sale of their existing home and purchase of the retirement village dwelling.

Residents: Insiders.

The reality of asset-rich-cash-poor older people in New Zealand has been well documented (e.g., Else & St John, 1998; St John, 1993). In this context, the opportunity for people to buy a house and release capital proves to be a great incentive to residents. For instance:

That is what attracted me – also the outdoor activities – but the fact that it was less money than some of the others although it was licence-to-occupy as against freehold – say like [other local retirement villages]. People like myself: I was in a position where I had a property. It was a development property and at the time, the properties were soaring in price so I saw the opportunity of selling that property and moving into [RVO] and acquiring by doing so a substantial amount of capital which enabled me to live a little bit better than I would if I was living on purely [Government Pension] sort of thing. (Tom, Resident, Focus Group Excerpt 14)

That Tom begins his comment with the attractiveness of the financial offer suggests it is important to him. In a brief aside he also mentions the attraction of "the outdoor activities". Tom ends with a statement that indicates his only income is the state-provided pension (Guaranteed Retirement Income). The "bookend" framing of his account

in financial terms suggests the financial aspects of his decision are important. This is further supported by Tom's use of metaphors that are consistent with economic discourse: for example, the "soaring" property prices that affected the value of the opportunities offered by his "development" property. Tom normalises his choice by suggesting he is not the only one – "people like myself".

Tom suggests that he was asset-rich, cash-poor before he moved to the retirement village. This is indicated explicitly in the juxtaposition of the adjective "substantial" used with "capital", and the ironically intended, comparative phrase "a little better" used with "live".

It seems that in practical terms, people like Tom could buy a nice home, release some cash, and have an improved lifestyle by moving to a retirement village. In terms of self-concepts and organisational identity, it seems that the RVOs are benevolent businesses, helping older people into a new standard of housing at cut rates: a new home, in a holiday-like environment. Thus, residents can live as if they are wealthy even though they still have modest incomes. Outsiders meantime, tend to see it as a form of conspicuous consumption: that is, only for the (relatively) wealthy.

While non-residents tended to frame the class dimension of retirement villages in terms of finances, residents acknowledged the class dimension in *social*, rather than *financial* terms. For example, consider this comment from Gladys:

It seems a horrible thing to say, but everyone is nice and comfortable – there's no riff-raff or anything like that. We are all working on the same level. (Gladys, Resident, Focus Group Excerpt 15)

The descriptors, "nice and comfortable", "no riff-raff", "working on the same level" along with similar comments from other insiders including "like-minded people", and "certain type of person", all indicate a desire for homogeneity in the retirement village. They highlight the idea

that membership of a retirement village community requires a certain type of person and involvement in certain ways.

In one sense, both residents and non-residents fall on the same side when it comes to access to retirement villages: Money “talks”. Retirement village living is affordable for middle New Zealand homeowners. However, the image of retirement villages held by outsiders is that villages manifest conspicuous consumption. The senior manager’s observation that ordinary residents did not quite match the surroundings, Margaret’s comment that retirement villages were trendy for the middle income group, and non-residents’ descriptions of retirement villages as “flash” and “posh” show retirement villages to be representations of positional consumption. From a practical point of view, RVOs leverage both resource and identity issues associated with older age. Thus, one hook for asset-rich, cash-poor middle New Zealanders is the release of capital to enable a better quality of life – or at least a better style of consumption.

For “Old Age” or “Active Ageing”?

Non-Residents: Outsiders.

Non-residents and residents expressed similar concerns about negative aspects of old age. Significantly, non-residents constructed retirement villages as places for old people and residents constructed them as places for active people. Each participant group held strong views on who should live at a retirement village. Consider these excerpts from non-resident focus groups:

Delia: When I can’t drive, I’ve got no daughter around the corner to look after me . . . so, what am I going to do? . . . am I going to end up in a retirement village?

Ed: “Move to”. Don’t say “end up”, say “move to”. (Non-Residents, Focus Group Excerpt 16)

Frank: [looking at brochure] They're too young to be there.
 Gill: Well I just took one look at them and thought "what are they doing there"?

Frank: Mmm [agreement].

Researcher: So, retirement villages?

Gill: — — are for old people, very old people. (Non-Residents, Focus Group Excerpt 17)

One notable comment in this excerpt is the attempt by Ed to reframe the terminal phrase "end up" to an active phrase "move to". This suggests that Ed wants Delia to express *choice*, whereas other non-residents tend to frame entry to a retirement village as an event of little choice. Delia's question recognises that changes in her circumstances means she may need to make other choices, but at a later date. Interestingly, her concerns are consistent with the structural factors framed by residents' as problems and reasons for choosing retirement village living. Unlike residents, Delia has yet to experience a significant enough gap between her expectations and realities. However, the terminal phrase "end up" not only suggests that there may be a time when she will, but that her choices will be limited. Along with the question "what are they doing there?", "end up" suggests the idea that only "needy" and "old" people go to retirement villages. It seems that from a non-resident perspective, old age and lack of choice converge: a sign that discourses of negative ageing are present.

Residents: Insiders.

On the other side of the retirement village fence, residents express quite different views about who should live at a retirement village. As mentioned above, a feature of membership in functionally-based communities is shared interests (Brint, 2000; Plant, 1974). Retirement villages as communities of shared interests may be viewed as functionally based in that they are aimed at a particular kind of older person: "active

people over 55-years". The promotional material of RVOs explicitly states this and residents' focus groups vigorously supported this view.

The perceptions of and importance given to like-mindedness by residents suggests values associated with having something in common. The limits of like-mindedness emerge when residents notice evidence of "oldness" among their ranks. This became most apparent when residents talked about other residents as "others". Consider this focus group excerpt involving two residents:

Hal: The original concept was for active retirees 55 and over – "active" being one of the compelling words in that phrase. Now they are bringing people in – –

Betty: On walkers – –

Hal: Who are even over 90 – –

Betty: New people over 90

Hal: And of course it's gone away from that concept that we thought that we were coming into. That's not to say that the living for us has changed, because as a number of us have said, you can participate or not – but it does change the atmosphere of the place. (Residents, Focus Group Excerpt 18)

These residents are complaining about the RVO not keeping to its stated philosophy of a village based around active residents of 55-years and up. The residents interpret the RVO actions as threatening their self-concepts as "active" and bringing them closer to that which they most want to resist – ageing as decline. Ageism is evident in that the speakers assume that someone over 90-years cannot be "active" and that using a "walker" (walking frame) means the same. This concern is emphasised in the string of short phrases from "on walkers" to "who are even over 90" to "new people over 90". The speakers create a barrier between the active "us" and the "others" who are old and use walkers. Even though the final speaker assures listeners of his independence, he also suggests that the

changed “atmosphere” affects his lived experience of the retirement village.

These residents’ comments are similar in theme to those of non-residents in that *both* groups focus on the “otherness” of those who seem old or at least older than them. Retirement village residents resist new residents who appear old and therefore threaten their positive self-concepts of (or identity claims to) being “active 55-plus”. Non-residents, on the other hand, identify retirement villages as places for old people and make no distinction between differently aged or differently-abled residents – only between themselves and retirement village residents. Fears associated with discourses of negative ageing seem to unpin the concerns of both groups, as both groups seek to affirm their own positive self-concepts by distancing themselves from “others” whose very presence threatens those identity claims.

From another perspective, the residents’ resistance to over-90-year-olds and those with walking frames points to expectations of what constitutes norms for members of the retirement village community. That is, the community is not only defined along functional lines of age and orientation to active lifestyle, but also defined by emerging norms for how members should be and behave in that community.

The emerging norms seem to relate to identification with stated organisational goals: that is, residents accept and endorse RVOs’ claims to provide lifestyle living for active people aged 55. In ratifying organisational goals, residents not only act to claim positive self concepts, they also act on behalf of the RVO, and *as* the organisation (see Cheney, 1991; Weick, 1995). Thus, residents’ identification with RVO goals is important because it suggests an incentive for cooperation between RVO as corporate organisations and residents as members of those organisations. That the residents perceive differences between stated RVO goals and their own lived experience suggests there are issues about what organisational and/or community *membership* constitutes in RVOs.

In the light of the above findings, retirement villages as community seem to have implications for residents as well as RVOs. The next section of the chapter explores some of the tensions identified at the organisation-community interface: that is, where residents' and employees' expectations of RVO as community meet the RVO as organisation.

Creating Community: Insiders Compete for Membership

This section explores insiders' expressions of membership roles in retirement village as organisation and community. I discuss definitions of communication as expressed by RVO employees and residents, and explore practical realities of *membership* where employees and residents claim rights to retirement village membership.

Retirement Villages: Embodiment of Community

Retirement village staff and residents seemed to equate retirement village living with values such as connectedness and a feeling of belonging – values traditionally associated with community. For instance, consider the following individual comments from the residents' focus groups:

This is a village where you live your own life in a community of like-minded people in some ways, and so you can do your own activities or you can belong to the village activities, or do both. (Gina, Resident, Focus Group Excerpt 19)

I think the little community here where everybody's so friendly is an emotional security as much as anything. (Louise, Resident, Focus Group Excerpt 20)

There is always, in any community, people who like what's going on and you find a niche in the community and some of those people who are – – some people are always pushing the envelope and so it's normal and people – – I think what I am getting here is a sense that the people in this room have found their place in this community. (Andy, Resident, Focus Group Excerpt 21)

The themes of choice, independence, and belonging are evident in adjectival phrases: “like-minded people”, “niche in the community” and “you can do your own activities or you can belong”. The descriptions of communication by RVO employees, and in particular senior staff, incorporate these same themes, but also identify externally observable features of community. Consider the following statements from senior managers:

I suppose the retirement community is like any other community. It's a social grouping of people who live in a particular area and by-and-large would have a sort of similar social economic background . . . the community is more than just a collection of people or a collection of houses. There is a sense of identity, a sense of place and belonging, yeah, and it – – I guess for people who are part of a community, they feel themselves to be part of a group and the – – for successful communities, I guess the sense of being part of a group and being part of a community is a positive experience for those people – they feel good about being at that group or community, and I suppose the community is also a group but functions in a coordinated and complementary way. People do things with the community in mind, not just a fairly selfish basis. (Senior Manager A, Interview Excerpt 4)

It [retirement village] is a community within a community, and it's an integrated community in that they [residents] are part of the wider community, but they know the value of being inside their community as well. (Senior Manager B, Interview Excerpt 5)

But I would say that . . . a genuine community within a retirement village is diversification with people aged from 55 to over 95. It's like minded people who . . . want to move into a village. You already know 95% of over 65s don't live in a retirement village and probably a vast proportion of those would never want to. So they have to be a certain type of person. A genuine effective community . . . would be a group of people who interact when they want to interact, have a separate lifestyle and total separate identity whenever they want to have a total separate identity, but who are able to feel as though they can trust and rely on anybody else within the village to help them out in a situation of need and to have a bit of fun and go and do a few things. (Senior Manager C, Interview Excerpt 6)

Three key ideas are apparent in these excerpts. The first relates to notions of identity: The central idea expressed is the value of identity itself, and that residents develop a sense of identity by belonging to a community. Specifically, the managers refer to residents' identity in two ways: (a) being members of "we" (the village), i.e., being the same as others, and (b) by being separate from others, i.e., identity by antithesis. Senior Manager A notes that "being part of a group [retirement village] and being part of a [wider] community is a positive experience". Likewise, Senior Manager B describes residents who value being "part of the wider community ... [and] being inside their community".

The second idea is that retirement villages are "normal" because they are just like any other community. Yet, interestingly, Senior Manager A identifies external factors such as locality and a "similar social economic background". In contrast, Senior Manager C specifically talks about retirement villages as community, and claims age diversity as a key feature. It could be argued that these senior managers see "normal" community in any setting as dependent on individuals selecting in or out on the basis of external features. This is a somewhat simple expression of community; others would argue that community only develops with engagement (Arnstein, 1969; Plant, 1974; Mattessich & Monsey, 1997; Wharf-Higgins, 1999).

The final idea to be expressed by the senior managers is the view that community depends on enacted roles of its members. In each case the managers focus on the roles of *residents*. Senior Manager A defines community as "a group [that] functions in a coordinated and complementary way [where] people do things with the community in mind [and] not just on a fairly selfish basis". Similarly, Senior Manager C says community is a place where residents "can trust and rely on anybody else within the village to help them out in a situation of need and to have a bit of fun and go and do a few things". The relationship between

individual residents and the collective is thus important to any ongoing sense of community within the retirement village.

However, *conspicuous by their absence are references to the roles of employees within retirement villages*. Thus, the next section offers one example of clashes between notions of community, organisation, and residents' expectations of these in a retirement village setting.

One Resident's Narrative: Community?

The narrative given below concerns the interaction between employees and residents at the community-village and corporate organisation levels: first, the interactions between (usually senior) staff visiting or working at the village and the village residents; and secondly, the rights of corporate staff to use village facilities for RVO purposes. David, a resident, tells the story of his observations of Bob, a development manager, during the first seven months of his living in the village:

For seven months a fellow called Bob who was a project manager, who walked through this village every Thursday, walked through the village on the road, and I would be sitting in my lounge with the door open during the summer months – he'd walk right past. What would help if he did a wander round, came in and said "I'm Bob" and I would say "well I'm David, take a seat have a cup of coffee or gin or sherry" or whatever it is at the appropriate time of the day, and he'd say "how are you doing – any problems? Got any problems?" But no, seven months that man walked backwards and forwards past my villa and all the other villas too, and never spoke to a soul. On one occasion that man walked round that corner [points to it] – there were three ladies and myself standing by the roses which you heard about – there was a bucket of roses there – he had to squeeze past us to get a bunch of roses and put his \$5 in the tin, and didn't say a word. Not to one of us. (David, Resident, Focus Group Excerpt 22)

The focus of David's narrative is the behaviour of Bob, a project manager, when he is at the village. The recurring action is "walk": David says that Bob "walked through", "right past", "backwards and forwards", "[a]round" and "never spoke to a soul", "didn't say a word". David's expectations that Bob would subscribe to usual social cues for social

engagement with residents are evident in his references to his open door, and the fact that Bob had to “squeeze past” people to buy roses. In the same way that Bob depersonalised residents by seeming to ignore them, so David depersonalises Bob as “that man”. That Bob behaved like this for seven months is also important to David as he not only repeats the phrase, but uses it immediately after suggesting how Bob may have behaved differently. From this one example, it seems that David’s expectations of Bob are based on the assumption that residents are stakeholders in the RVO as *community* as well as *organisation*, and therefore could expect some kind of engagement with other stakeholders, including employees. However, Bob (later) expressed his position quite differently: He has a job to do and often does not have time to talk to residents. Clearly, Bob places himself as a stakeholder within the RVO as the organisation, but not within the residents’ community.

Two other examples illustrate the tensions between community and organisation; between residents who live in homes and employees who carry out parts of their jobs at villages. First, one senior manager expressed concern about the assumption that the village facilities were available for corporate functions. The manager was clear that function dates and times were always negotiated, but felt uneasy with the taken-for-granted nature of the requests – or announcements that the village centre was required for a corporate function. He expressed the view that the village was where the residents lived, it was their home, and should not be viewed as an extension of corporate offices. Yet, the RVO owned the property and staff members did not question the right to use village facilities for corporate events.

Second, residents at one village complained about a staff member who entered homes using a master key for the purpose of checking smoke alarms. The residents saw this event as an invasion of privacy and argued that just because no-one answered the door, did not mean no-one was home. As residents, they believed they had the right not to answer the

door, and the staff member had no right to enter their homes without permission from the resident. The staff member was unable to see any problem with what he had done; from his perspective he was “just doing a job”.

It could be argued that discourses of ageism and managerialism converge in these instances to privilege staff over residents.

Managerialism is

a kind of systemic logic, a set of routine practices, and an ideology . . . It is a way of doing and being in corporations that partially structures all groups and conflicts . . . the logic of managerialism can be articulated by anyone – owners, workers, and society – and defines a place for each of these groups. (Deetz, 1992, p. 222)

In this way managerialism may be seen to shape the roles and expectations of staff who may view residents as in some way subordinate to their own work role. When this is combined with inherent ageism, the extent to which employees privilege the organisation over residents is extended. From another perspective, it could also be argued, that these examples express a tension between insider expectations of community and organisation. That is, both residents and employees enact and interpret differently, roles associated with organisation and community.

Summary and Conclusion

This chapter helps to contextualise issues of residents’ participation in RVOs through exploring dimensions of community as expressed by outsider and insider stakeholder groups with reference to organisation. Clearly, retirement villages embody features and values of community differently for RVO insiders and outsiders. Both residents and non-residents used aspects, ideas and values of community to explain why retirement villages did or did not embody community. Interestingly, both groups “other-ised” those who were older or appeared less active than themselves. Ageism infused both the resistance to negative discourses of

ageing, as well as efforts to distinguish their form of community from the other.

The overall difference between non-residents and residents of retirement villages is that non-residents tend to evaluate retirement village as community in terms of the *observable* external features such as the physical location and design. Residents, on the other hand, focused on *membership* and relationships. Three major issues emerge from the comparison of outsider-non-resident and insider-resident expressions of community. They are that (a) discourses of ageing infuse both outsider and insider narratives; (b) issues of identity and identification infuse expressions of community and retirement village living; and (c) “active” is a central organising value in residents’ identification with stated RVO aspirations. Each of these areas is now discussed.

First, both residents’ and non-residents’ descriptions of their own lives and the “other” are underpinned by deep resistance to stereotypes of ageing. Yet, both groups at various times expressed ideas that demonstrate fears based on those same stereotypes of ageing. It seems that discourses of negative ageing and externally-evident “old-ness” threaten their self-concepts of being active and independent agents. Thus residents and non-residents are, metaphorically speaking, fighting similar battles in different sites as well as *against the (each) “other”*. This should not appear strange: Ageism among *the old* is not surprising; after all, older people are products of an ageist society (e.g., Palmore, 1999; Radford, 1987).

Ageism infuses outsiders’ responses to images of retirement village and their residents, as demonstrated in comments about people being “too young” for retirement village living. Outsiders’ tended to “other-ise” residents as “old” and in “need” and tended to ignore structural issues when accounting for the existence of retirement villages. Yet, material realities of housing, changing demographics, and failure of natural support networks appear to have structurally affected actual choices for some older people. In this light, ageism may be seen to underpin the

labelling of residents' accounts as "justifying their choices". That is, the age of residents makes it easier to focus on individual rather than wider social context.

Second, values associated with community are used by outsiders and insiders to explain their position and these seem to be associated with issues of identity and identification. The main concern for outsiders seemed to be that RVOs could control their lives and stop them from being themselves. Claims to self-concepts of independence and self-determination, along with identification with existing location and social networks maintained a sense of *real* community for village outsiders. In the light of these ideas, RVOs could not possibly be *real* communities.

In addition, it seems that the *organisational* dimensions of RVOs influenced outsiders' descriptions of retirement villages as artificial communities. From their external position, non-residents assumed that RVOs establish the rules and residents obey them – just like any other formal organisation (see Deetz, 1992). However, this view fails to take account of the fact that *any* community has rules that govern behaviour. Often implicit, but in some community groups very explicit, rules directly govern and influence member activity (Brint, 2001). Acceptance of such rules suggests members identify with the community or organisation. For example, residents' complaints about unsuitable people being "allowed in" reveal both a willingness to identify with organisational aspirations, as well as a (reluctant) acceptance that the RVO makes the rules. Therefore, it is not simply that residents of retirement villages "obey" organisational rules; rather they may share, and endorse in everyday action and inaction, organisational goals, aspirations and values.

One mutually-accepted organising value for residents and RVOs seemed to be active people. Promotional images present retirement villages as activity-based lifestyle enclaves (e.g., Bellah et al., 1985; Brint, 2001; Simonson, 1996). Yet, as *organisations*, retirement villages develop social, administrative and communication structures and processes, while

as *communities*, expectations, norms, and values associated with village living also emerge. In this latter context, the idea of being active seems to influence beliefs about the *village purpose* as well as responsibilities and expectations of *membership*. Such responsibilities and expectations concern how residents should behave, how active they should be, and how they should interact with each other. From this position, residents' resistance to "others" (those who did not fit the "active 55-plus" image) points to expectations of what constitutes norms for members of the retirement village community. That is, the community was not only defined along functional lines of age and orientation to active lifestyle, but also by emerging norms for how members should be and behave in that community. Notions of "like-mindedness", similarities in socio-economic status (i.e., "middle New Zealand"), along with similar experiences prior to moving to the village, help to create a sense of connection between individuals living in the same geographical location. Thus, residents' resistance to non-conforming residents may also point to an emerging identity for residents within their *claimed*, rather than *RVO named* community.

The subtle and significant issue to emerge from this chapter is the impact of the RVO as both an organisation and a producer of community-as-product. Non-residents describe retirement villages as artificial, partly because of the role of the RVOs as *organisations*. Employees and residents tend to highlight *community* as a *residents' domain* with little reference to employee roles. Yet, tensions between employee and resident expectations about each others' roles are evident in, and clearly have implications for, residents' participation in RVOs. The next two chapters explore these domains.

CHAPTER 8

RESIDENTS' PARTICIPATION IN RVOs

This chapter considers a range of meanings and practices associated with residents' participation in retirement villages. In particular it addresses in part, the second emerging research question: *How residents participate in RVOs, in what domains/arenas, on what specific issues or questions, and with what authority?* It examines the implications of resident (or customer) participation in RVOs and it shows how such participation works and to whose benefit.

The chapter is structured in two main sections. The *first* introduces the topic of participation and discusses it from the perspectives of marketing, organisations, and community development. It then discusses particular definitions and approaches, and how these are applied within this study. The *second* section explores the dimensions of residents' participation in RVOs as organisational communication.

Introduction to the Study of Participation

The Perspective from Marketing

Marketisation of the retirement housing sector in New Zealand promises customers the whole-hearted attention of suppliers of goods and services. In this respect the sector is no different from other domains of consumer life. Marketing-oriented organisations aim to find out what their customers want and give it to them and in this study senior managers expressed just this view of RVOs. Because marketing "*respects and engages the consumer . . . marketing thus asserts itself as participatory, responsive, and above all democratic*" (Cheney & Christensen, 2001, p. 235, original emphasis). Thus, marketing discourse implies customer participation.

Retirement village organisations are both organisations and communities. As business organisations, RVOs develop and operate to

produce products and services that will be used by individuals, and in so doing create wealth for financial stakeholders. RVOs are also communities, in that individuals live their lives in the retirement village itself. Both organisation and community are influenced by the philosophy, values, and actions of the corporate organisation which developed and/or owns the village. Advocates of a community development model of participation may question whether a retirement village is a “genuine” community, especially if the concept of self-determination is applied. For instance, self-determination is founded on two principles: firstly, that “people who actually belong to the groups know their own needs best” (Plant, 1974, p. 60); and secondly, that communities “like individuals have the right to self-determination” (Plant, 1974, p. 71). Self-determination means that community members decide on the focus of problem solving and do it for themselves, rather than relying on others to do it for them. On the other hand, within the RVO the financial nature of the contract between residents and the RVO influences resident participation. Residents may view themselves as *financial investors* and therefore perceive a right to be involved in matters concerning them; organisational representatives may see themselves as acting for the corporate owners and therefore position residents as *customers* to be consulted and not *participants* in service-related decision-making.

The community development model describes membership, participation, and self-determination as valued aspects of community in that they ensure community is not just an “abstract sense of belonging, ‘but is the well-spring of democratic values’” (Berry, Portney, & Thomson, cited in Wharf-Higgins, 1999, p. 289). However, the organisational communication approach takes into account the influence of organisations in establishing retirement villages and the impact this has on residents’ view of their roles and their participation at various levels of the organisation. The following sections explore other perspectives on participation. The first section discusses different models of participation

within workplace and community settings; the second explores benefits and types of participation, and the third outlines approaches to examining participation in practice.

Other Views and Other Models

Essentially, participation concerns the (re)distribution of power (Arnstein, 1969) and applies to organisations, communities and society. Within the boundaries of an identifiable community or organisation, participation concerns the capacity and opportunities for members to contribute to the development and maintenance of that community. *Development* in the context of *community development* may be broadly interpreted to include social, economic, and political dimensions. *Participation* in terms of community development has been described as community members being involved in identifying their needs, addressing defects in the systems that create or maintain those needs, and mobilising skills and resources (financial and otherwise) to address them (Plant, 1974; Arnstein, 1969; Wharf-Higgins, 1999). In this context, participation means members have the power and mandate to identify and address issues. Democratic participation is generally conceived as “participation of the governed in their government” (Arnstein, 1969, p. 216). Thus, from a communication perspective participation implies some sort of cooperative relationship between the *governors* and *the governed*.

Participation has been examined in community and organisational or workplace settings and several models have been developed which may apply to this study. Three are considered here: Arnstein’s (1969) ladder of participation; Dachler and Wilpert’s (1978) participation continuum; and Clegg’s (1983) models of co-operation and co-determination.

Arnstein’s (1969) ladder of participation is located within the community development paradigm. She argues that the extent to which a given group can identify and address needs is affected by its members’

access to, and support from, external resources as well as their own skills and resources. Importantly, Arnstein argues that the *types* of interaction with external support systems also impact on a community's capacity and approach to addressing its needs. Arnstein's classic ladder of participation (see Table 8.1) differentiates between three broad types of participation. The first is non-participation where external (and powerful) parties focus the change on individual members rather than structural issues contributing to a given problem. Consider, for example, an emergency ward where waiting times are so bad that one person has died because of delay: A therapeutic response may result in the establishment of first aid courses for the local community rather than addressing the problems at the hospital and involving community members in that process. The second type is degrees of tokenism, which includes information-giving and consultation with communities. This may involve community members "being heard" but these people do not have the power to ensure their voice will be heeded. The third type is degrees of citizen power, which includes partnership, delegated power, and citizen control. In this group community members have some degree of power either equal to, or greater than usual decision-makers.

Dachler and Wilpert's (1978) participation continuum progresses in steps of increasing involvement in decision-making (see Table 8.1). The context of this model is work organisations rather than larger social or political bodies such as urban renewal or economic community development programmes. Just as Arnstein (1969) distinguishes between *the governed* and *the government*, Dachler and Wilpert's model assumes *employees* are not *management*. The continuum begins with Step 1 of "no information" and ends with Step 6, "partnership". Across Steps 2 to 4, management essentially handles information and allows employees to receive it. These steps align with Arnstein's "degrees of tokenism" which also suggest low-level and limited participation of workers – unlike Steps

Table 8.1.

Models of Participation for Workplace and Community Settings

Participation Continuum (Adapted from Dachler & Wilpert, 1978)	Ladder of Participation (Adapted from Arnstein, 1969)	Cooperation– Co-determination (Adapted from Clegg, 1983)
Step 1: No (advance) information is given to employees about a decision to be taken.	<i>Non-participation:</i> Therapeutic involvement Manipulation	No rights to participation
Step 2: Employees are informed in advance of the decision to be made.	<i>Degrees of Tokenism:</i> Information giving	<i>Cooperation</i> 1. Right to information 2. Right to protest
Step 3: Employees can give their opinion about the decision to be made.	Placation	3. Right to suggestion
Step 4: Employees' opinions are taken into account in the decision process.	Consultation	4. Right to consultation
Step 5: Employees have a veto, either negatively by blocking a decision that has been made, or positively by having to concur in advance.	<i>Degrees of Citizen Power:</i> Delegated power	<i>Co-determination</i> 1. Right to veto (a) temporary (b) permanent
Step 6: The decision is completely in the hands of organisation members, with no distinction between managers and subordinates.	Partnership	2. Right to co-decision
Step 7: Decisions are exclusively in employees' hands (reverse of Step 1)	Citizen control	3. Right to decision

5 and 6 which align with Arnstein's delegated power and partnership categories.

In terms of communication, Dachler and Wilpert stress that the *meaning* of each of Steps 2 to 6 is likely to differ, because of differences in the degree to which employees can take part. Unlike Arnstein, they reject Step 7 as a reversal of Step 1 because it “defines the situation in which decisions are exclusively in the hands of employees” (p. 14). It may be inferred from their rejection of Step 7 that there is a general acceptance that managers manage in organisations and there is no place for employee (“citizen”) control. However, Dachler and Wilpert’s model is useful because it articulates participation in relation to decision-making and therefore points toward the roles of organisational communication structures and processes.

Clegg (1983) offers another framework and one which conceptualises participation as cooperation and co-determination. This framework is useful because it frames participation as a series of *rights* within these two kinds of interaction (see Table 8.1). Clegg’s framework aligns closely with Dachler and Wilpert’s (1978). The four steps of Co-operation – the right to information, protest, suggestion, and consultation – are consistent with Steps 2 to 4 of Dachler and Wilpert’s model. In addition, the first three steps of Co-determination reflect Steps 5 and 6. The fourth step of Co-determination, “right to decision”, may be viewed as the rejected seventh step of Dachler and Wilpert’s model. Clegg’s model is useful to this study in that the steps of participation suggest cooperation within or between groups that may include management, employees, and citizens. It implies “the governed and governors” as equally as “the managed and managers”. Moreover, cooperation and co-determination speak to the communicative dimensions of participation.

Each of these models may be used in a range of organisational or community settings: for example, managers working “top down”, or community groups organising with local body government. In the case of this study, they can be applied to retirement village management and

retirement village residents. Arnstein's (1969) ladder, like Dachler and Wilpert's (1978) model, is helpful in that it articulates graded steps of participation. Dachler and Wilpert's model also helps to specify communication activity within each step. Finally, Clegg's (1983) inherently communicative model features "rights" that highlight questions about who decides when, on what issues, and to whose benefit. Implicit in all three models is that participation is a good thing. The next section examines common rationales for participation.

Features of Participation: Definitions and Approaches

Reasons for advocating participation of the governed in government and the managed in management centre on *benefits*: that is, benefits at the personal level as well as organisational and societal levels. There are also different types of participation and together with benefits, these are discussed below.

In terms of personal benefit, people who participate experience greater levels of personal control over their lives (Arai & Pedlar, 1997; Chavis & Wandersman, 1990; Zimmerman & Rappaport, 1988) and feel more empowered (Schulz, Israel, Zimmerman, & Checkoway, 1995) than non-participants in the same group *even before* embarking on a participation experience (Wharf-Higgins, 1999; also see Kanter, 1982; Stohl, 1993). This view is supported by Pateman's (1970) argument that participation in the workplace results in individual and collective development and enables individuals to participate effectively in other areas of wider society. In other words, there are benefits which extend beyond the immediate boundary of the domain of participation. Thus, in the context of retirement villages, residents' participation in their community may have implications for their participation in the organisation, as well as broader domains of society, which affect older people.

In terms of workplaces and internal organisational affairs,

employee participation has generally been viewed as an organisational intervention implemented to improve productivity and efficiency, and occasionally in terms of the instantiation of democratic principles at work (compare Cheney et al., 1998; Dachler & Wilpert, 1978; Stohl & Cheney, 2001; Strauss, 1982). Worker participation in Total Quality Improvement programs and self-directed teams is primarily used to improve productivity (Seibold & Shea, 2001). However, increased decision-making for workers within their work is often promoted as improving job satisfaction (Mohrman, Ledford, Lawler, & Mohrman, 1986; Monge & Miller, 1988). What Cheney (2006) calls *social participation* translates into employee involvement in some decisions but not necessarily into influence over policy-related matters. In contrast, *political participation* means involvement in policy decisions and business strategies (Cheney, 1999, 2006). For instance, in some worker cooperatives, all employee-members participate in a general assembly based on a one-person, one-vote model. As Patemen (1970) writes, "'participation' refers to (equal) participation in the making of decisions and 'political' equality refers to equality of power in determining the outcome of decisions" (p. 43).

In order to distinguish between these types of participation and the role of power and control in participation, Pateman (1970) asks that we specifically consider the kinds of contributions workers make to organisational choices and the kinds of decisions they are involved in. She suggests that participation in decision-making may not necessarily mean equality of influence or power. In workplace or community settings, the level of participation may differ by group, both vertically and horizontally across the organisation. An organisation may talk about self-directed teamwork, yet in practice only senior managers may experience equality and collaboration. Thus, any system of participation must be examined in relation to the organisation's stated goals as well as the principles of participation articulated more generally by the organisation.

As mentioned above, *marketing communication* has been described as

having a democratic ethos in that it purports to be above all responsive to customer needs. *Participation* may also be described as having a democratic ethos in that those who are affected by decisions are able to contribute to those decisions. However, participation may be less than total democracy, and less than everyone being involved in everything (Kanter, 1982). Not every employee or member needs to participate in every decision for a system to be deemed democratic. Therefore, a participation process itself may be open-ended (Stohl, 1993) and in this way participative processes enable the expression of new ideas from unexpected quarters (Kanter, 1982). The essence of democracy is that individuals are valued for their *potential* contributions to the social or political body and that avenues of participation remain open and negotiable. However, *it is important to find out what participation actually means in practice – both in terms of meanings held by participants and in terms of what practices actually take place* (Pateman, 1970).

Approaches to Examining Participation in Practice

Marketisation of the retirement village sector includes the ways in which the organisations influence the lives of older people who live in them. Influences come through the organisational structures and processes that govern the organisation-resident relationship and many of these processes are established by the organisation. However, the RVO-resident relationship is by its very nature about resident participation. Therefore, to establish boundaries within which to evaluate resident participation, I adapted Stohl and Cheney's (1996, 2001) definition of worker participation by substituting "resident" for "worker" and "RVO" for "workplace":

[Resident] participation comprises organisational structures and processes designed to empower and enable [residents] to identify with organisational goals and to collaborate as control agents in activities that exceed minimum coordination efforts normally expected in the [RVO]. (adapted from Stohl & Cheney, 2001, p. 357)

It is important to examine organisational processes and structures

because they form a matrix of rules and guidelines that people draw on in participation processes (McPhee, 1985). Within the RVO structures and processes are forums for information sharing, processes for identifying issues for consultation, and procedures for inviting suggestions and enabling protests. Such activities are consistent with the market principle of being *customer-focused*. The extent to which, and in what ways, residents identify with organisational goals and influence organisational activities becomes visible in examining these processes and structures more closely.

For the purposes of this study, RVOs were separated into three domains: resident *community*, *village*, and *corporate* organisation. The *residents' community* refers to resident-focused activities, communication, and coordination. Such activities included residents' social and recreational activities as well as coordinating communication within the resident body. The *village* includes interaction between residents and employees required to ensure the smooth functioning of operational systems. Such interaction concerned development and maintenance of facilities, planning, and administrative communication between residents and staff. The *corporate* organisation refers to that group responsible for strategic goals and decisions, brand management, and official organisation-village-resident interface. Such communication activities were normally exclusive to senior staff.

Residents may be seen as stakeholders of all three domains, but what did this mean in terms of participation? What if any, were the differences between residents' community and village activities? Thus, the central question became: *How did retirement village residents participate, in what domains/arenas, on what specific issues or questions, and with what authority?*

One way to make democratic process more concrete and amenable to communication/rhetorical/discursive analysis is to focus on decision-making. Bernstein (1976) identifies three dimensions of decision-making in workplace participation. This framework may also be applied to other

settings, including resident participation in RVOs. Bernstein's three dimensions of decision-making are: (a) the *range* of issues over which workers have control; (b) the *degree* of control; and (c) the organisational *level* at which the control is exercised (Bernstein, 1976). Within the workplace setting, the range of issues may include employees' own (individual and team) work such as physical working conditions, health and safety, and work procedures. The range may or may not embrace operational issues such as hiring, training, setting wages, or issues of strategic direction, division of profits and investments. Thus employees may have complete control over their immediate work but little control in other parts of the organisation.

In addition I used Lukes' (1974) three-dimensional model of power to examine aspects of power in relationship dynamics between residents and RVOs. Lukes' three-dimensional model of power is useful for examining hidden or unobserved aspects of power. The three levels of power are: (a) observable and direct; (b) less observable; and (c) least observable aspects. At level one, for example, a third-party may observe a person make a request of others. The observer may assess power-in-use by noticing who asks, who complies, who rejects the request, and in what ways. At level two, a person may not even respond to the request, so an observer is left wondering who was exercising power, and how. At the third level however, power operates by shaping perspectives: That is, people accept their role, because they see it as normal, or unchangeable, or can see no alternative. Therefore, power at this level is difficult to observe. Practically speaking, this means individuals do not even think about objecting to a given request or set of circumstances. Where this occurs, there is a risk that a particular way of doing things will dominate and in so doing, privilege dominant groups while disadvantaging others. Lukes' model is particularly useful because it demonstrates that power cannot be resisted until it is recognised.

Finally, I applied Cheney's (1999, 2004, 2006) framework to identify

levels at which adoption of discourse occurs in organisations. Cheney's framework of adoptions also has three levels. The *first* level of adoption is in talk or common reference points in the everyday functioning of organisation. In this case the organisation simply adopts terms of the new language to refer to existing practices that remain more or less intact. For example, market discourse adopted by health agencies may change language from "doctors treating patients" to "health managers serving customers" (see Fairclough, 1992, 1993) yet relationship practices remain largely intact; individuals attend clinics where health professionals diagnose and treat illness.

Some evidence of talk without substantive change in practice was seen in this study. In one of my feedback sessions to senior managers I used a farming metaphor to demonstrate how residents saw themselves: "not like [dairy] cows where you open the gate and they walk out of the paddock, along the race to the next open gate". One manager quipped, "Sometimes I wish they were!" and everyone laughed. While humorously intended this response exposed tensions between the historically-positioned medical-model approach to residents (i.e., patients) and common references to customer-focused service.

The *second* level of adoption in Cheney's (1999, 2004, 2006) model is the "cafeteria approach" where organisations adopt or appropriate formerly external practices "*in distinctively regional, local, or even organisation-specific ways*" (Cheney, 2006, p. 194, original emphasis). With regard to this approach, the Toyota Assembly Plant in Thames, New Zealand, adapted Total Quality Management components to suit workers' expectations about the boundaries of work: No workers were expected to attend unpaid meetings and Quality Circle meetings were held in work time rather than after work (Simpson, 1998). Within the New Zealand retirement village sector, the American mega-size retirement village has not yet developed. Villages in New Zealand remain small enough to be identified as organisations and certainly not suburbs or towns in

themselves.

The *third* level of adoption involves the fundamental transformation of an organisation or sector by external influences. With regard to marketisation, the retirement village sector appears to have wholeheartedly adopted the market model. The retirement village complexes and care philosophy of voluntary and church agencies have been superseded by privately owned and publicly listed RVOs (see Chapter 2). However, at the internal level of organisations, there are questions about the extent to which roles and relationships between RVO management and residents have been influenced by marketisation and in what ways.

Bernstein's (1976) model is useful for examining claims to having a participatory organisation or larger social or political structure. Bernstein's questions about decisional involvement help to identify resident participation in each of the three domains of retirement village organisations – community, village, and corporate organisation. Lukes' model highlights aspects of power within organisational structures and processes, particularly hidden power. Together with Cheney's (1999, 2004, 2006) three levels of discourse adoption, these models help to reveal the extent to which marketisation has brought participation and choice to residents, in which organisational domains, on what issues, and to whose benefit.

The next section discusses themes relating to resident participation which emerged from the analysis and interpretation of residents' and employees' spoken texts. It begins with introducing two central assumptions about business and organisations, and then moves to a discussion on participant perceptions of residents' roles before moving to resident participation itself.

Residents' Participation in RVOs

Residents' participation needs to be considered within two general assumptions that became evident in the analysis. Being customer-focused is a central feature of market discourse and in the retirement village sector communicates to residents ideas of care, consideration, and provision of services that meet resident-articulated needs. While the marketing ethos encourages organisations to be customer-driven, *agency* – the capacity to act – lies with the organisation. Customers cannot *direct* a given organisation although they may *influence* it to act in particular ways. Thus, customers may want and even expect organisations to listen to them (e.g., in the *Nike* sweatshop campaigns, see Knight & Greenberg, 2002), but there is an unwritten rule of business that accords organisations the right to choose how they go about their business. The underlying premise is that the organisation is ultimately in charge. In light of this, it was of little surprise that the first theme in residents' and staff descriptions of participation was a *general acceptance* of this premise. Specifically, organisational structures and processes, and designated employee and residents' roles were accepted as "normal". That is, managers managed the village, and residents lived in the village (community).

Second, there was a general assumption that specific organisational communication processes and structures embodied the RVO's enactment of its customer focus. For example, the regular meetings between staff and residents, employee position descriptions, consultation activities, and even PR events were described as communication forums to help "meet residents' needs" (Senior Managers, Interviews). Residents also expressed the view that because of their financial contributions to the RVO – the customer relationship – residents expected to be listened to.

These two assumptions need to be kept in mind when discussing residents' participation in RVOs because they infused roles, expectations, and interactions between residents and RVO staff members. Three interconnected arenas of communication were revealed in the data: (a)

residents' and RVO members' *expressions* about their respective roles; (b) explicit and implicit *expectations* associated with these roles; and (c) *relationships* between *intended messages* of corporate communication, *residents' interpretations* of corporate communication, and resident and RVO *expectations of participation*. These arenas of communication are discussed below in the context of residents' roles, and the different forms of residents' participation: managed participation, accepted domains of participation, and managed informal communication.

Residents as Customers, Owners, and Residents

The analysis revealed three ways in which residents and RVO employees framed residents' roles that influenced the forms and domains of resident participation. The three roles were *resident*, *customer*, and *owner*.

First, *resident* as a term for someone living in institutional care emerged as the medical-custodial model of residential care receded in the late 20th century. The term "resident" has come to replace terms such as the "inmates" of old age homes (Tennant, 1989) and the "patients" of hospitals, and is used widely in the aged-care sector. In this study, all participants used the term "resident". While it appears neutral – it means *to reside* – the noun positions residents as passive and living-in the village as opposed to active and participating in the organisation. By extension the term *retirement village resident* may evoke discourses of ageing-as-decline and withdrawal from society: that is, retiring. Moreover, in terms of participation, neither residents nor employees expected residents to be actively engaged with things outside of their individual social lives. The following excerpt from a village staff member is typical of both staff members' and residents' comments about residents' activities:

We do things together, like we have housie, we have line dancing going on today, like you can participate in the community if you want, like having morning tea, having your girlfriends, having a game of bridge or housie or whatever, or you can be – – you can just completely ignore all those things, live here and never speak or participate in anything. I mean we have an [end of year] Christmas

party here and there's lots of things that they can get involved in if they want to – there is nothing forced. I guess it is like living in a hotel – you can see what's up on the hotel board, when you go in and see. (Village Support Staff, Interview Excerpt 7)

The staff member's use of pronouns signals a subtle shift from the village to the residents. The "assumed we" (Cheney, 1983) seems to incorporate the village as a whole – both residents and staff. Yet the term "they" distinguishes the speaker from the subject and identifies residents as "the other" who engages in social activities. This is notable because it indicates the *relationship of involvement that staff members have in organising activities for or with residents*. The employees participate in *setting up* events and activities, and the residents participate in the activities. In short, the focus is on residents' recreational and social life.

The direct references to "hotel" and the inference of choice – "nothing is forced" – reveal discourses of leisure and activity that infuse this speaker's statements. However, the organisational structures and processes communicating the leisured nature of activities are in themselves restrictive because they establish natural barriers to other forms of resident participation in RVOs. That is, residents can do "what they like" within the prescribed boundaries of leisure. Thus, in terms of Bernstein's (1976) model of participation, residents' had control over a specific range of decisions within their community domain (see Table 8.2).

Table 8.2.

Residents' Participation Domains and Activities

Level of organisation at which control exercised	Domain of participation	Accepted issues
Organisation: Residents' participation relies on invitations from management and acceptance of given organisational structures and processes.	Promotional activities	Attending investor evenings and other public relations activities Assisting with promotional lunches for prospective residents
	Relationship marketing	Producing village newsletters which usually have a corporate component Holding tournaments with external clubs Hosting events not associated with the village e.g., service group meetings, dance classes, handcraft and flower-arranging classes
	Consultation and feedback channels	Attending 6-monthly or annual meetings with senior management Participating in consultation processes such as focus groups or planning groups
		Contributing to improvements in the residents' handbook Completing residents' satisfaction survey Attending meetings with village manager e.g., weekly coffee morning, the general monthly meeting Using the manager's open door policy on individual basis
Community: Residents' participation relies on acceptance of given organisational structures and processes, although there is also the capacity for residents to set up their own processes.	Residents' activities	Using the complaints process through the residents' committee
		Attending or being involved with formal residents' groups such as residents' committee or social club
		Organising in conjunction with other residents social, sporting, or other events that become part of the activities calendar
		Attending meetings, classes, and sessions organised by RVO or residents to be held at the village e.g., yoga, dance, handcrafts
Individual: Participation is self-determined outside of and within given existing organisational structures and processes.	Individual social life	Attending social and other events formally arranged by the residents e.g., happy hour
		Engaging in informal activities with other residents
		Managing individual activities of daily living

The second role was the *customer* role which was influenced firstly, by residents' and employees' conflicting expressions of ownership, and secondly, by the permanent, residential nature of the purchase. Significantly, no residents in focus groups ever referred to residents as customers and only one group talked about customers in reference to *prospective residents*. This implies that *after purchase* customers became something else: "residents that owned their own homes" (Residents' Focus Group). Equally significant was the RVO view that residents were "more than customers" as shown in the excerpt below:

[The retirement village sector] is much more market-focused and much more cust – – resident-focused. I don't like calling our residents *customers* 'cause they're not customers, they're more than that to us – they live with us every inch of the day. A customer is someone that comes in, they buy something and they go, and you may see them again if you do it well but our residents actually *live* with us so I'm struggling to find another word – we have been for a long time. We don't really like calling them customers but what do you call them if they're not residents? And "family" is a bit too much. (Senior Manager, Interview Excerpt 8)

The manager seems to struggle with the terms customer, resident, and family because, in his view, the words fail to capture the nature of the relationship between RVO and village resident. He seems to suggest it is more than a supplier-purchaser arrangement and yet less intimate than family relationships.

The word *owner*, and market-model type terms like *client*, and *consumer* were not terms that RVO employees applied to retirement village residents and they are absent from this manager's talk. The term "customer" was rare in employee discussion about village residents: in 13 staff interviews only three participants referred to residents as "customers" (and one of those is in the quote above). Senior staff used the term "customer" or "target market" in descriptive ways, but did not refer to residents, and rarely prospective residents, *specifically* as customers. However, other senior managers used the term "market". Consider this

excerpt from an interview with another senior manager:

There are an awful lot of people in this business who say, “Oh – old people – we know what they want” but the reality is the ever-diverse group of people, their needs and desires are very, very different. So unless you are actually going to decide what it is that the market wants – I am going to ask people what they want to do and give them what they want. (Senior Manager, Interview Excerpt 9)

This manager expresses commitment to the principle of customer focus; he personifies the macro-level term market thereby making “the market” more human as well as categorising older people as potential *customers*. By referring to their diversity and stating he will “ask people what they want”, the manager also personalises the demographic group of older people. Moreover, he demonstrates a customer focus orientation.

Against this background, the phrase “cust – – resident-focused” in the previous excerpt is noteworthy: the manager was about to say “customer-focused” but suddenly broke and shifted to “resident-focused”. The manager defines customer as an exchange relationship characterised by intermittent and short-term contact. This definition used alongside the repeated phrases “residents/they live with us” suggests that the RVO-resident relationship is long-term and intimate. That the residents “live with *us*” is particularly interesting because it puts the RVO in a position of control and the residents in a subordinate role, and therefore suggests that agency lies with the RVO.

In terms of participation within a marketised organisation, a customer role implies firstly, interaction with a supplier and secondly, a greater sense of agency than resident. Organisations are required to be active and proactive in finding out what customers want and such RVO activity included consultation and formal research (see Table 8.2 for range of consultative communication activities). As mentioned above, customers can influence but not directly control an organisation. Thus, in the retirement village context, *customer* participation remains at the discretion

of the RVO. Residents' involvement in activities related to future organisational development, such as village design, changes to facilities, and communication forums, was initiated and driven by the RVO. In terms of Bernstein's (1976) model of participation, the retirement village customer may have as little control over organisational decisions as the resident. However, as customers, residents could expect RVO invitations to participate in decisions and issues at the village level and possibly in the corporate domain.

Thirdly, the role as an *owner* implies high levels of decision-making and control over a broad range of issues. The Western nature of ownership is such that a purchaser on payment acquires associated *rights* as well as a given *product*. In the context of this study, the RVOs positioned themselves as *owners* in that they had invested money in the creation, building, and organising of the villages. By association, employees as representatives of the RVO assumed rights and responsibilities associated with ownership in communicative activities such as decision-making and consulting of residents. That is, acting "as the organisation" (Weick, 1995). That the RVO could organise structures and processes to enable residents' participation suggested that in practical terms at least, RVO ownership was widely accepted by employees and village residents.

Residents also expressed the idea that they were *owners*—a view also supported in some ways in RVO talk. Residents cited their financial payments (capital sum and weekly fee) to the RVO as the reason for this claim. However, the capital lump sum was payment for a licence-to-occupy type agreement and not freehold title. Moreover, the weekly fee covered some services as well as access to and maintenance of facilities. Thus while the fine print left *formal* ownership with the RVO, residents *interpreted* payment of money as *ownership* and the right to expect certain levels of participation as well as communicative behaviours from the RVO. For instance, consider this excerpt from one residents' focus group:

The wee fee, the fortnightly fee which has to cover the costs of

running the building and the facilities and the staff that are here now are well aware that their allegiance is to the residents not to [RVO]. It's the residents that pay their salaries and their wages . . . and that's where this gap is, this is where this hole is between the staff that are here and the running of [the village] that is here and the getting of permission to do things or alter things or fix things in between the directors of [the RVO] and the village managers. That's the hole I'm frustrated with. (Mick, Resident, Focus Group Excerpt, 23)

The ironic use of “wee fee” suggests that the fortnightly fee was not at all small and therefore was also a symbol of the exchange relationship between the residents and the RVO. In short, residents *paid* for services, so they *expected* service which included communication, yet in day-to-day practice, residents reported communication problems. Mick *implies* that while the village staff members had loyalty to the residents (“allegiance”), decisions made at village level were not supported by corporate level action – *and ought to be*. Gwenda, the slightly cynical speaker below, endorses the view that payment of money meant ownership and therefore could expect certain communicative behaviours from the RVO:

[The fee] covers all the things *so from that point of view we own it or so they tell us* but if we own it, then if they're going to repaint then they should at least consult somebody (Gwenda, Resident, Focus Group Excerpt 24, emphasis added)

Gwenda clearly expected RVO employees to consult with residents about changes to village facilities because the residents “own it”. The pronoun “somebody” stands out because it is a non-specific reference and contrasts with the more inclusive pronouns “we” and “us” used before it. It suggests the absent and opposite term *nobody*: that is, the RVO should have consulted *somebody* instead of *nobody*. Like the excerpt above where Mick negatively characterises RVO communication with the nouns “gap” and “hole” and explicitly states that residents were not listened to, Gwenda points out that residents were not consulted when they should be.

Finally, in relation to ownership, residents generally conceded that the RVOs were “in business” and that this had implications for them. However, the implications were contradictory: *Residents both excused the organisation because it was a business, as well as expected the organisation to treat them well because they were customers of that business.* For example, more than one resident said that “at the end of the day” the RVOs “are in it because it’s a business and they have got to make money out of it” (Residents’ Focus Group). This kind of statement implied (and sometimes explicitly generated) the response that “the decisions they make when it comes to crunch time are basically biased in favour of the company” (Residents’ Focus Group). That is, *business* needs take precedence over *customer* needs.

In some respects it seems that residents had little decision-making control over issues and resources at the village level, but rather relied on corporate management’s discretion to participate beyond the routine. This is not to say that residents meekly accepted this arrangement. As one senior manager said, “the residents tell us when things aren’t right – they will stop me in the foyer to tell me things”.

The residents participated financially in the RVO and this generated expectations of contribution to a greater range of participative activities than the RVOs organised. However, residents’ claims to ownership were over-ridden by the RVOs’ enactment of ownership: that is, the control of communication channels and resources needed to implement village-level decisions.

In law, RVOs own the villages, but how residents expressed their sense of ownership created different expectations. Thus, there were tensions that had implications for resident participation. In order to investigate these tensions, I examined residents’ participation in *managed*, *accepted*, *informal*, and *contested* domains.

Managed resident participation concerned consultation, coordination, and communication activities needed to keep the village

operating, the RVO informed about residents, and the residents informed about corporate developments. These domains were the jurisdiction of village and/or corporate management. *Accepted* domains of residents' participation concerned those areas in the complete control of residents as well as those located within the domain managed by RVO staff (see Table 8.3). Domains of *managed informal* participation concerned those communication forums that were structured in terms of organisational relationships and schedules, but informal in nature. *Contested* domains concerned those areas where residents expressed alternative aspirations from those expected of them by RVO staff and management and are discussed in the following chapter.

Managed and Accepted Domains of Resident Participation

Resident participation exhibited two central characteristics. Much of residents' participation was orchestrated by corporate or village employees. On the one hand residents were *invited* to take part in information sharing forums such as village meetings, newsletters, and promotional events; to complete satisfaction surveys; to participate in focus groups about development; and to contribute to specific problem-solving forums. Yet, on the other hand, with the exception of the annual setting of the weekly fee, residents were excluded from financial decisions and those related to business direction, financial investment, and hiring staff (see Table 8.3). The RVO prepared a budget of items covered by the weekly fee, and presented this to the residents' committee and sometimes to the residents for review. At villages where they could not operate at full capacity because much of it was still under construction, the RVO subsidised the weekly fee: That is, the residents did not pay the full fees to cover the whole cost of services and facilities and there was some level of negotiation over the final amount set.

Table 8.3.

Management and Residents' Participation: Accepted Domains

Accepted management activities

Business directions and profits

Investment areas

Brands: RVO and village

Development e.g., village design, village size, and locations

Contracts and fee structures for village residents*

Market research

Marketing and promotion

Staff recruitment, position descriptions, salaries, promotions, and training

Village policies and procedures

Health and safety of staff and residents

Recruiting and screening prospective residents

Accepted joint-issues domain

Coordinating village events

Using communication forums between residents and staff

Managing complaints

Managing referral scheme for new residents

Suggesting improvements to facilities and activities

Accepted residents' activities

Decisions related to: residents' committee

Residents' social club

Village events involving residents

Social activities

Ways of looking out for each other

Individual lives

*Setting the weekly fee was sometimes negotiated with the resident body.

When these areas of organisational operations were mentioned in interviews or focus groups, they were framed simply as part of the “scene”. Residents and staff members alike listed them as part of job responsibilities and they were not explored or questioned in any way by either employees or residents. Types of interaction and the degree to which they are endorsed or controlled by those in power (in this case the RVOs) influence the degree of participation open to community members (Arnstein, 1969; Bernstein, 1976). In this study it was apparent that the exercise of RVO power went largely unnoticed in the legitimated, apparently neutral organisational structures and process (see Hardy & Clegg, 1999; Lukes, 1974).

Another characteristic of participation was that the *managed* resident participation expressed themes also evident in corporate promotional materials. The “natural” domains of the residents’ *community* were infused with discourses of active and positive ageing as understood by society generally and utilised by retirement village promotions specifically. Residents ran “just about everything” (Staff Interviews and Residents’ Focus Groups) when it came to their community events, social activities, clubs, and outings. The corporate and village management endorsed residents’ activities and structures, such as the residents’ committee and social club, which supported community life and resident-run functions, and promoted an *active village life*. In this respect then, residents enacted participation as active lifestyle within the organisation-provided environment of the residents’ community.

In summary, residents had complete control over their individual social life within given boundaries established by nature of the contract with the RVO. At the *community* level, residents’ participation occurred within accepted and sometimes co-developed organisational structures and processes. At the *village and corporate levels* residents’ participation occurred by invitation from management. At these levels, three distinct groups of communication activities were identified: (a) resident

consultation and feedback; (b) relationship marketing activities; and (c) promotional activities (see Table 8.2).

The domains of participation with specific examples of residents' involvement are given in Table 8.4. Each communication activity had particular goals for the RVO. *Resident consultation* aimed to improve customer service, quality and functionality of facilities, and residents' satisfaction with the village. Residents participating in a group set up to contribute to facilities' design and upgrade wrote a letter to the village manager in which they said, "It is important, if not essential that residents have a say in these matters as they are the future users and satisfied customers are the best advertisement to any enterprise". This is evidence that residents, as much as RVO employees, understood the relationship between consultation, satisfied customers, and ongoing sales for the RVO. Interestingly, the only time in the study that residents' referred to themselves as customers was in this letter.

Relationship marketing activities aimed to "break down barriers" created by stereotypes of retirement villages (Senior and Village Managers). This included encouraging local groups to use village facilities for meetings and group sessions; for example, Probus club meetings and craft classes (Senior and Village Managers). *Promotional activities* aimed to promote the RVO in addition to the village (Senior Managers). Through the involvement of residents in each of these categories, management anticipated benefits for the RVOs in terms of better image, and ongoing sales (Senior and Village Managers). These activities are typical of a customer-oriented organisation.

Table 8.4.

<i>Communication Activities and Purpose of them</i>	
1. Resident-focused & -initiated activities	Purpose and contributions of residents
Residents' committee	The forum is run by residents and the job of the residents' committee is to respond to residents' queries and to liaise with village management. In most villages this is a formally-elected body. The degree of formality and complexity depends on the village itself. Most residents' committees hold a budget, some have sub-committees—all of which have regular meetings—and all hold an AGM. The residents' committee is the first point of contact for complaints; may raise money for residents' needs, such as equipment and facilities, not supplied by the RVO. The village manager may be invited to attend meetings.
Social club and individually organised events	Sometimes a formal elected body which reports to the residents' committee. In essence all parties agree that this is the residents' village and therefore the residents can organise what they like: includes theme nights, dances, film evenings. Individuals organise these usually in conjunction with the social club. If successful these events become part of the social calendar.
Happy hour	This is a regular feature of villages although frequency may differ e.g., weekly, monthly. Also, staff may be invited to attend.
Complaints process	Individual residents initiate complaints often through the residents' committee and/or some other regular communication channel established by the RVO.

Table 8.4. (continued)

2. RVO–Resident communication	Purpose and contributions of residents
Monthly village meetings between manager and residents	Keep residents informed; keep them satisfied that they know what is going on.
Regular informal meetings with the manager	To target and connect with residents
Manager’s open door policy	To facilitate residents access to the manager.
Activities calendar (monthly)	Members of the residents’ social club and other interested residents meet with the coordinator who prepares a monthly calendar. Purpose: so everybody knows what’s planned. This also goes into village promotion packs.
Development planning team	RVO management selected residents on the basis of skills, expertise, and experience to be part of this group which was to work on the upgrade of the village.
RVO Residents’ focus groups	Consultation with residents for ongoing development including improvements to existing villages and development of new ones
Resident satisfaction surveys	Consultation with residents to improve services to residents at each stage of the process from initial enquiries to moving in to using village facilities and services
Senior management regular meetings at individual villages	Informal coffee mornings with residents; to talk over issues managers do not normally hear about
Development of the residents’ handbook	RVO seeks input from residents about what information needs to be included, and in what format.
Inter-village visits and games	Usually initiated by village management; however, with assistance of activities coordinator, residents organise event.
Village newsletter (signed off by RVO)	To keep profile of organisation and village activities high; easy way to show enquirers and families what’s going on.

Table 8.4. (continued)

3. RVO relationship marketing	Purpose and contribution from residents
Host events not associated with the village e.g., service group meetings, dance classes, handcraft and flower arranging classes	Local groups use village for club meetings, events. Purpose: to enable people to experience the village without “hard sell”; to show them what the place is like, break down pre-conceived notions of what constitutes a retirement village
Tournaments with external sports clubs	Usually initiated by village management; however, in some cases residents host the event with support from village management.
Residents involved in promotional activities	To involve residents (became problematic when one resident became “picky” with enquirers and put them off).
Promotional events such as investor evenings	Roadshows such as updates on RVO activities/developments/the village. Residents are sometimes invited to attend.
Invite enquirers (on database) to lunch	Purpose: to keep relationship going– “we want to be the first choice when the time comes”. Residents are not usually involved in these events, but selected individuals may be asked to show visitors around.
Invite club members to lunch and look around (clubs where events are sponsored and advertisements placed)	No contribution from residents although they may suggest groups to invite.

Structured Informal Participation

Formal communication processes and structures that enabled resident participation depended on informal face-to-face communication events between management and residents. Thus, formal communication processes were supported with semi-informal face-to-face interactions that influenced the level and type of residents' participation (see Stohl, 1995). The situations described here are examples of village managers' *articulated* strategies to communicate with residents informally.

Three types of *managed informal* communication activities were identified in the analysis: (a) village managers' informal "open-door policy" for residents; (b) executive managers' informal regular (e.g., monthly, 6 monthly) "get-togethers" with residents; and (c) residents' meetings with the village manager which were *informalised* by being reframed as "coffee morning" or "afternoon tea". Examples of each of these are discussed below.

Open-door policy.

Many village managers had an *open-door* policy that enabled residents to speak with the manager on a one-to-one basis. This policy was underpinned by the principle of customer focus. Consider this excerpt from an interview with a village manager:

Residents who go past [my office] have got something on their mind right there and then—the door's open so they can come in. It just saves the build-up and then the explosions. You can't hide away, I mean that's part of your job, it's a huge part of your job is being accessible . . . the [development managers] say to me "Oh you're always being interrupted and you know I don't know how, how do you get your work done?"—I go, "well that's my work, this is my job is actually keeping these people happy, because you know if they're happy we are going to sell more units and then everyone's happy. If they're not happy, we're not, because they're going to be telling everyone". (Village Manager, Interview Excerpt 10)

The manager's emphasis on accessibility is evidenced in "you can't

hide away”, “it’s part of your job”, and “it’s a huge part of your job”. Although she uses the pronoun “you” when expressing this view, she is referring to the *role* of village manager. Moreover, she switches to “I” when reiterating what she *said* to the development manager, which indicates her personal commitment to being accessible. In comparison, other village managers also promoted an open-door policy; however, it required greater resident agency – a resident had to make an appointment, and in so doing, had to weigh up whether the issue warranted the action of doing so. These village managers were available, but only by *arrangement*. For this manager, the open-door policy was *literal*, and in a real sense lowered the barrier to residents. These slight differences in process clearly impact on the capacity of residents to participate, and demonstrate how organisational processes and structures influence the very process of participation.

Of particular interest is the way in which this village manager set up an “us” and “them” situation with her and the residents on one side and development staff on the other. The implicit message is that the development managers did not understand that the residents were the manager’s work. The manager stresses that it was her role be available and accessible to residents. If a manager is available, but (seems) inaccessible, residents will be unlikely to approach her. The village manager made this very clear when she later talked about the proposed new position of her office. The development manager wanted to move the office to the “front” where she was easily accessed by visitors and people enquiring about the village. She, on the other hand, wanted to leave it where it was, on the resident-side of reception where she was accessible to residents. She saw the new office as a show piece for visitors, and refused to move on the basis that the residents would not come and see her there. She wanted the (new) office to remain the Sales Manager’s and was putting up at fight at the time of this research.

This situation may be used as a metaphor for the tensions between

operations and development needs of RVOs. The principle of customer focus underpins the manager's commitment to being accessible to residents in that being customer-focused ensured the RVO made (more) sales. The development managers were also customer-focused, but had different customers in mind: the prospects. Any visitor to the village was a prospect, but residents were already part of the business and therefore did not need to be "sold" to. To help explain why the village and development managers differed, it is useful to consider other interviewee statements about the *tensions* between the needs of the development and operational sides of the RVO. Consider the following excerpts from a senior manager:

[we have] progressed on the "just look at the property development, that's the only way" when it's the operations that actually keeps the whole thing going – it's what people see when they come in. . . . I think . . . that at the board level [the focus] is very much on the business – on the money – on the creation of the wealth. At the other end of the business, focus is on the people. I think that does create some tension and it does create some issues within the organisation. (Senior Manager, Interview Excerpt 11)

The notable feature is the senior manager's reference to tension between a business focus on making money and one on people. He said later in the interview that "old age isn't sexy": that is, *property was the face* of the business even though *residents were the business*. Here, in this excerpt he points out that *operations* may have incorporated architecture and landscaping, but visitors to the village, experience its atmosphere, and people.

In referring to these varying approaches, the senior manager suggests that the operations and development aspects of the business are connected in some form of dialectical tension: they both work together to achieve RVO goals – that is, to create and maintain a product to sell, but each also pulls on the other in some way. This tension is evident in the village manager's representation of the situation: The development managers privilege village architecture and the promotional (and money-

making) properties of it, while the village manager privileges relationships with residents and (the money-making properties associated with) keeping them happy. Contradictions are apparent: the RVO can't sell old age, but can sell architecture, yet without the residents the RVO would only be a property developer with nothing else to sell. Even so, as a metaphor for philosophical and practical tensions within RVOs, the discussion about the village manager's office location is revealing.

In summary, the success of residents' participation in the open-door policy depended on firstly, the village manager's interpretation and structuring of it and secondly, the physical location of the manager's office. Both of these had the potential to influence participation because they enacted and communicated accessibility to residents.

Another form of structured informal communication concerns the "coffee morning", "afternoon tea" and "happy hour" with residents. I discuss these next.

Other informal communication forums.

Senior management in both RVOs made a point of visiting villages regularly for morning or afternoon tea or happy hour. At some villages these were monthly, and staff sometimes attended, while at other villages, special events were organised for visiting senior management. While these are formalised "informal" communication, both residents and management participants seemed to value these events. Senior staff valued them because "we find out things that we don't normally hear" through other communication channels. Residents enjoyed the contact with senior managers, especially those with whom they did not interact much except in these forums. One example that stood apart from the others and illustrates the significance of structured informal communication is "Coffee with Annie".

"Annie", a village manager, set up a meeting specifically to improve communication with one (large) group of residents: women. It began with a small group of residents inviting her to join them for coffee.

Interesting is the fact that she then *formalised* the event by scheduling a weekly meeting framed as “Coffee with Annie”. This is how Annie explained its development.

I came down here to [this area] a few months ago and a few of the residents invited me to join them for coffee. So I sat down and we just had a really good discussion about different things. So I said to the [office] girls, “we [should] do this every Wednesday morning at 10 o’clock so put a sign up” The first week I think there were half a dozen people but it got to the stage where just about the whole area was full so we ended up going into the library. The library is now full every Wednesday morning, but these ladies now stand up [and talk], ones who would never have done it [before]. We have one guy who talks a lot at the big meetings . . . I told him “Albert if you’re going to come in [to the coffee morning] and if you’re going to bring up stuff like that, you know that there are avenues [for that]”. He’s stopped doing it now, thank God. But we just sort of put him in his place and the women there, because there’s so many, and they went, “Oh Albert shut up because this is our meeting thank you it’s not yours”. So this is a really interesting development that, you know, they have actually turned round to [speak to] him . . . they would never do it in the big meeting. But this is theirs, this is for their stuff, they don’t want him taking over with all his political crap, they just don’t want it to happen. So they turn round now and go “shut up, shut up” . . . and so he doesn’t actually come [any more]. (Village Manager, Interview Excerpt 12)

In framing it as “Coffee with Annie” she appealed to a discourse of informality and friendship rather than formal resident-manager relationships. However, she maintained her managerial authority in her exclusion of business matters which she negatively characterises as “political crap”. The negative characterisation suggests some level of tension in management-resident relationships. However, the very fact that she could formalise a coffee morning indicates the *level of control she had over communication activities*.

Annie adopted this coffee morning approach because she specifically targeted the women; the quiet, uncomplaining woman, who is private and more likely to speak in intimate conversations (e.g., Tannen, 1984). Annie enabled the women to participate by *naming* the forum

("Coffee with Annie") and *controlling* the topics for discussion ("their stuff"). By excluding certain issues (and therefore residents) from this "women's session", the manager demonstrated her *capacity* and *authority* to manage residents' participation (and non-participation) in village communication forums.

Interesting is the discursive shape of the story and how the manager positions herself in relation to the women residents. The manager begins using "I" statements, especially when talking about action specific to her. She uses the pronoun "we" when talking about her and staff ("we do this every week") as well as her and residents ("we sort of"). The centre of the text features a shift from "I" and "we" to "they", and so mirrors the shift of agency from Annie to the women residents. The centre statement "I told him . . ." is the last time she uses "I", and "we sort of put him in his place" the last time she uses "we". After this, Annie refers to "they", the women residents, and in so doing distances herself from the action and accords the women residents agency. Her original agenda of keeping this a women's communication forum is thus conferred on the women themselves. This is not to say that the women residents did not adopt the agenda for themselves. Rather, it demonstrates the level of control the manager had in facilitating participation and non-participation in ways consistent with her original objectives.

Annie and the residents who attended identified tangible benefits from the coffee morning. Within a month of starting this weekly session, Annie noticed a drop in formal complaints – a trend which continued for the next four months (the point at which this research took place). She reported that discussing small issues in this forum enabled sharing of different ways to deal with the things and enabled her in her manager role to "get things done right there and then". Those residents who attended the session called it "a discussion", "conversation", "chat session", and "gossip" session where they shared personal stories of their week as well as some village issues such as lighting in the car-park (Residents' Focus

Groups). Two men who had attended but then dropped out complained that the manager “refused to talk about some issues” (Residents’ Focus Groups). However, residents’ who attended the coffee morning supported the manager for referring “certain items” to the residents’ committee.

These examples of structured informal communication demonstrate the value of noticing residents’ needs. The village manager is focused on enabling communication with residents. Both the open-door policy and “Coffee with Annie” demonstrate the possibilities for resident participation, and, as Kanter (1992) advocates, enable the expression of new ideas from unexpected quarters. They also demonstrate the benefits of recognising and opening up alternative channels of communication. The “Coffee with Annie” example shows particularly well how the participation process can be open-ended (see Stohl, 1993), with residents contributing to problem-solving before things got to be problems.

Finally, these examples illustrate the significance of individual differences in enacting policy and processes that influence processes of resident participation. That is, individual managers’ and employees’ interpretations of and responses to residents’ needs or wants, and efforts to initiate participatory activities, influence resident participation in RVO affairs.

Summary and Conclusion

This chapter identified several interconnected arenas of communication: residents’ and RVO members’ expressions about their respective *roles*; explicit and implicit *expectations* associated with these roles; and *relationships* between intended *messages* of corporate communication, residents’ *interpretations* of corporate communication, and resident and RVO *expectations* of participation. Three roles attributed to or claimed by residents were also identified (resident, customer, and owner) as well as three domains of residents’ participation: managed, accepted,

and structured informal residents' participation.

Overall the accepted areas of residents' decisions may be summarised in terms of Bernstein's (1976) three dimensions of decision-making, as follows (see Table 8.5). First, the *range* of accepted issues over which residents had control was predominantly within their social and community events. Second, the *degree* of control residents had was influenced by organisational structures and processes linked to active and leisure lifestyle discourse. Finally, the organisational *level* at which residents exercised the highest acceptable level of control was within their own community. At other levels of the organisation – village and corporate – residents were invited to contribute to but not make decisions (see Tables 8.2 and 8.5).

Thus the first main finding was that residents' participation was largely managed by RVO structures and processes implemented by employees. However, that these forums for participation were *managed interventions* does not diminish their value in terms of residents' participation. In workplace and community settings, member participation has long been advocated as beneficial to individuals and the wider group (Deetz, 1992; Pateman, 1970). Moreover, the acts and processes of participation constitute membership (Wharf-Higgins, 1999) and identification with organisational goals (Stohl & Cheney, 2001).

Table 8.5.

Degree of control and domains of residents' participation

Forms and processes of participation	Type of participation	Levels of participation
00. Managers make decisions without consulting residents. 0. Impersonal suggestion box: Managers accept or reject without giving reasons.	Residents' participation is not possible or actions are ignored.	Predominantly corporate domain and sometimes the village domain.
1. Managers give prior notice of change: Residents have the chance to voice views, and decision may be reconsidered*. 2. Same as immediately below but managers usually reject residents' proposals.	Cooperation or "co-influence"	Village and corporate domains
3. Residents initiate criticism and suggestions and discuss them face-to-face with managers. Latter still have sole power to decide. **		Community and some village domain decisions
4. Manager delegates some decisions generally to residents, reserving ultimate veto which is rarely used. 5. Residents wait until management has decided, then veto or approve. If veto, management resubmits with modifications.	Joint management or "co-determination"	Community
6. Joint power or partnership: residents and manager co-decide in a joint board. 7. Residents' council superior to managers	Full residents' control or "self-management"	Community domain (limited decisions only e.g., social events)

* First step of regular participation. ** First step of democratic participation. (Adapted from Bernstein's [1976] table of workplace participation.)

The second and associated finding was that RVO structures and processes established for the purpose of communication between residents and employees were widely accepted by both employees and residents as “natural”. That is, managers manage and residents reside. In addition, each manager’s enactment of his or her role impacted on the enactment of residents’ participation. That is, although each RVO and each village had forums for residents’ and employee-resident communication, the ways in which individual village managers structured, framed, and enacted these processes influenced the ways in which residents could and did participate in village affairs.

Third, market-friendly discourses associated with *ownership* and *customer rights* seemed to underpin residents’ explanations for their expectations of RVOs. Residents took seriously RVO commitments to customer focus and expected the organisation to “listen” to them, and there was a general assumption that specific organisational communication processes and structures embodied the RVO’s enactment of its customer focus. At the same time, residents expressed doubts about the RVO’s abilities to be focused both on residents’ needs *and* on making money. This suggests that residents understood the idea/ideal of customer focus to have limits in practice. Interestingly, both residents and RVO (mostly management) employees expressed a sense of ownership of the village that brought them into conflict with each other.

Fourth, managed resident participation expressed themes of participation evident in corporate promotional materials. The “natural” domains of the residents’ *community* were infused with discourses of active and positive ageing as understood by society generally and utilised by retirement village promotions specifically. Residents ran “just about everything” when it came to their community events, social activities, clubs, and outings.

Fifth, all resident participation activities helped the RVO achieve organisational goals. In short, the overall aim was to sell more dwellings

to keep each village viable. Contributing goals included maintaining residents' satisfaction, breaking down barriers created by stereotypes of retirement villages, and promoting the RVO's name alongside each village. Residents' involvement contributed to RVO goals in terms of creating and maintaining image, and facilitating ongoing sales. Moreover, residents were cognisant of their role in the promotion of retirement village living.

Sixth, dialectical tensions between development and village operations were evident at the village and corporate levels. Development staff tended to privilege village architectural design while village managers privileged relationships with residents; both expressed the view that their customer focus enabled the RVO stay in business. The interesting point raised by this difference is the nature of customer relations for RVOs. That is, RVOs must keep two relationships going: one with current and long-term customers, and the other with potential customers. Also significant is that RVOs stress they can sell architecture but not old age, yet without the residents, RVOs would be property developers only.

In considering the above it seems that residents' participation may be considered *social* rather than *political* in nature. Also, although RVO representatives did not specifically talk about participation, their concerns with residents' needs and specific references to a "customer focused industry" or "customer focused sector" (Senior Managers, Interviews) indicated some level of acceptance of resident participation but within RVO-defined boundaries.

Of particular interest was that residents both excused the organisation because it was a business, as well as expected the organisation to treat them well because they were customers of that business. This suggests that aside from the influence of the RVO communication structures and processes, residents' participation may be enhanced or limited depending on how residents themselves frame the

RVO's position as well as their own.

Generally speaking, when each party perceived the other to be acting in accordance with expected roles, relationships were unproblematic. Tensions emerged when one perceived the other to be either not performing within their expected roles, or stepping outside the expected roles. That is, when employees saw residents as getting involved in management issues, or residents saw organisation representatives as not looking after them, the "natural" boundaries of participation altered. This is the focus of the next chapter: contested domains of residents' participation.

CHAPTER 9

TRANSFORMATION AS MOTIVATION FOR RESIDENTS' PARTICIPATION

Introduction

This chapter also addresses the final emerging research question: How did retirement village residents participate, in what domains/arenas, on what specific issues or questions, and with what authority? In particular it examines those areas where residents' participation was contested by both employees and residents. This is not to say that participation completely failed for this would set up an unrealistic dichotomy. Rather, the critical events explored here demonstrate the ongoing negotiated nature of residents' participation in RVOs and possible motivational influences for it. This chapter also explores those dimensions of employee power which appeared to go unquestioned by either residents or RVOs. Together these dimensions reveal the extent to which marketisation meets ingrained discourses and practices of medicalised ageing, and challenges current expressions and enactment of customer-focused or resident-focused behaviour in RVOs.

I use parts of Galbraith's (1978) "Motivating System" (p. 40) as a framework for discussing the negotiated dimensions of residents' participation in RVOs. In his system, Galbraith identifies four motivational forces for organisational members – essentially employees. The first is *compulsion* (or coercion), which involves the presence of an overtly negative consequence where employees fail to comply with organisation requirements. In Burke's (1950/1969) terms, this form of motivation is outside the realms of persuasion which is "directed to a man only insofar as he is free" (p. 50). Within the context of RVOs the contract between residents and the RVO could be termed compulsory motivation in that once the contract is entered into, the boundaries for subsequent choices are

in place. However, the RVO would be expected to engage in extensive persuasive communication prior to the signing of the contract in order to engage the prospective resident with RVO goals, aspirations, and values.

The *pecuniary* motivation according to Galbraith (1978) involves payment for service. Here he focuses on employees and their financial rewards for the giving of labour to the organisation, although he also includes stockholders (shareholders in New Zealand terms). Galbraith argues that in modern organisations compulsion and pecuniary compulsion are rarely effective on their own. With this in mind, he argues that two other motivational forces operate with organisational members: *identification* (based on Simon's [1976] definition) and *adaptation*. It is these two that are important in terms of resident-RVO relationships, with *adaptation* being particularly significant. In order to discuss adaptation, it is first necessary to identify features of Simon's (1976) "*operational definition of organisational identification . . . and an embracing conceptualisation of identification-as-process inspired by Kenneth Burke*" (Cheney & Tompkins, 1987, p. 2, original emphasis).

Simon's (1976) view of identification concerns the influence of the organisation on the "operative employee" (p. 11): That is, how the organisation influences the employee's attitudes and behaviour in such ways as to ensure that decisions are made in favour of the organisation's objectives. Galbraith (1978) describes this as the individual accepting that the organisation's goals are superior to his or her own. Simon defines the "operative employee" as someone whose physical tasks – producing the product or providing services – carry out the organisation's objectives. With regard to decision-making Tompkins and Cheney (1985) modified Simon's definition of identification to read: "A decision-maker identifies with an organization when he or she desires to choose the alternative which best promotes the perceived interests of that organisation" (p. 194). In Weick's (1995) terms the decision-maker acts *as* the organisation.

Residents may be considered to be *operative* organisational

members in that they are *co-producers* of the village-as-product. In addition, they may be simultaneously *constrained* by the residency contract they signed with the RVO. Residents may not be directly or formally involved with RVO decisions. However, their everyday decisions within designated domains of participation may affect the RVO's capacity to achieve its objectives. For instance, there may be a negative effect on sales, if residents decide to tell outsiders that the RVO is not good at meeting residents' needs. Critically, the objectives of residents and RVO may both overlap and separate at different times. Residents and RVOs need to align (or at least appear to align) if both parties want to maintain certain identity claims. Residents risk their own identity claims where they tell outsiders that the RVO is not good at meeting their needs. Such actions could reflect negatively on residents' claims to be responsible in choosing retirement village living, and capable in working with RVO management. Thus, within their multiple and somewhat contradictory and tension-filled roles (as co-producers and contract-bound residents) residents' everyday actions and expressed attitudes could result in advantaging the RVO; for, as Burke (1937/1984) wrote:

One identifies himself [*sic*] with some corporate unit . . . and by profuse praise of this unit he praises himself. For he "owns shares" in the corporate unit – and by "rigging the market" for the value of the stock as a whole, he runs up the value of his personal holdings. (p. 16)

In terms of residents' perspectives, this means residents looking after the RVO as well as themselves. From the point of view of the RVOs, this means persuading residents that RVO goals and those of residents are the same. The extent to some residents identify with the RVO is demonstrated in one senior manager's comment about one resident's meeting with a senior government official.

One of the residents Laurie, sold [our RVO] to the [senior government official] as just most wonderful organisation in the world and then afterwards we thanked him and he said "I'm not going to tell him anything's wrong with this village". . . . he was quite plain about it, he said, "If we have problems we will talk to you about it, it doesn't have to go out of here". (Senior Manager, Interview Excerpt 13).

In his actions Laurie demonstrates the extent of his identification with the RVO and also the power of active and public resident support for the RVO. This is an example of alignment between RVO and residents' identity claims, as well as Laurie's commitment to the RVO (see Cheney & Tompkins, 1987). Yet, as will be shown later this in this chapter, the RVOs at times were seen to privilege their own identity claims and marketing concerns over current residents' needs and wishes. Also, the residents expressed the view that RVOs put the business first (see Chapter 8), which would suggest that there are at least differences between RVO and residents' aspirations. Therefore, even though residents may identify with the RVO, and engage in activities that support it, residents also have identity concerns separate from the RVO. As discussed previously (in Chapter 5) identification is the process by which "I" becomes multiple and partially conflicting "we's" (Burke, 1937/1984).

A is not identical with his colleague, B. But insofar as their interests are joined, A is *identified* with B. Or he may *identify himself* with B even when their interests are not joined, if he assumes that they are, or is persuaded to believe so.

Here are ambiguities of substance. In being identified with B, A is "substantially one" with a person other than himself. Yet at the same time he remains unique, an individual locus of motives. Thus he is both joined and separate, at once a distinct substance and consubstantial with another. (Burke, 1950/1969, p. 20-21, original emphasis)

With regard to RVOs, residents may identify with the rhetorical features of the built environment as well as espoused RVO commitment to lifestyle choice and values associated with innovation. They may equally

identify with their customer-owner role in relationship to the RVO, (as illustrated previously in Chapter 6) and develop expectations about how the RVO should treat them. That is, as *co-producers* of the village-as-product, residents expect *commitment* towards them from the RVO, in return for their *choosing* to enrol in a contractual relationship – an act of commitment in itself.

Importantly, commitment and identification have been identified as both distinct and interdependent concepts: “Identification [is] the appropriation of identity, and commitment [is] the binding to ‘action’” (Cheney & Tompkins, 1987, p. 9). They can work together or not. Cheney and Tompkins identify four types of commitment-identification interrelationships which they say may help to explain some of the contradictions with organisational members’ behaviours:

Type I: Alienated and non-pledged: (low identification, low commitment);

Type II: Alienated but pledged: (low identification, high commitment);

Type III: Self-appropriative but non-pledged: (high identification, low commitment);

Type IV: Self-appropriative and pledged: (high identification, high commitment). (1987, p. 9)

Three of these four different types may be adapted for RVO residents as follows:

Type 1: Not applicable to retirement village residents

Type II: The *anti-resident*: ranges from the resident who simply pays fees without any involvement at the village, to one who constantly challenges RVO management, yet continues to live at the village and be involved in village activities;

Type III: The *promotional-resident*: one who refers to him or herself as a “[Name of RVO]” resident or member, yet does not participate in village or organisation, politics or activities;

Type IV: The *participant-resident*: one who promotes the RVO and benefits of village life (to insiders and outsiders), and is involved in village and/or organisation, politics, and/or activities.

These distinctions may help to explain some of the contradictions between some residents' willingness to identify with RVO aspirations and yet also challenge RVO practices, and other residents' passive acceptance of RVO decisions. While some residents, whose goals align with RVO goals, accept RVO goals as superior to their own – as demonstrated in their acceptance of RVO authority in some decisions – others want to make a difference and hope to influence RVO goals so that they align more closely with their own. Galbraith (1978) calls this motivational force *adaptation* (p. 139).

Identification and adaptation are associated with each other, in that “[a]n individual, on becoming associated with an organization, will be more likely to adopt its goals in place of his own if he has hope of changing those he finds unsatisfactory or repugnant” (Galbraith, 1978, p. 144). It may be possible that RVO rhetoric about lifestyle and choice, leads prospective residents to believe that they can contribute to new ways of living in retirement.

Galbraith says that adaptation is “partly a matter of position in the hierarchy of the organization” (p. 144) and goes on to suggest that the likes of a CEO is more likely to be concerned about improving organisational objectives than a production or service worker. The significant differences between retirement village residents and production workers or service employees is that residents (a) pay a capital sum to (b) live in the village (c) are co-producers of the village product, and have (d) close working relationships with management and other RVO employees that combine features of traditional customer-organisation and employee-organisation relationships. The combination of these four factors suggests that residents may be more interested in adapting organisational goals than other organisation members such as employees who invest time and labour, or shareholders who invest money.

The term *adaptation* suggests incremental change and this relates to first-order change which involves minor improvements and adjustments

that leave the core of the organisation intact (Levy & Merry, 1986). These changes, planned or accidental, occur naturally as the organisation grows and develops. The ways of thinking and acting and the organisation's worldview remain intact while the content changes continuously, incrementally, developmentally, or sporadically (Levy & Merry, 1986; Cheney, Christensen, & Zorn, et al., 2004). Second-order change, on the other hand involves a radically changed core. Second-order changes are multi-dimensional, qualitative, discontinuous, contextual changes resulting in new ways of thinking and acting, and new organisational worldviews (Levy & Merry, 1986; Cheney, Christensen, & Zorn et al., 2004). Given that RVOs purport to change current understandings and experiences of retirement, it would seem that they open themselves up to motivational forces of *adaptation*. Moreover, if one applies the notion of second-order change to Galbraith's (1978) motivating force adaptation, *the possibility of transforming RVO goals* could provide additional motivation or strengthen residents' participation in RVO activities.

There are multiple terms with multiple associated levels of change that one could use with respect to the individual's "designs" on the organisation. The term "adaptation", while used here because of Galbraith's framework, is perhaps not the most apt in that adaptation is usually suggestive of the organisational member's *adaptation to the organisation*, and not vice versa. However, as argued above, adaptation does suggest incremental change and this is relevant to the study.

This chapter explores areas in which resident adaptation or transformational motivation may be operating. The chapter uses critical incidents to examine the dimensions of residents' participation. A critical incident is an event, process, or experience that (a) has immediate effects, but whose full meaning only becomes clear on reflection and evaluation; and/or (b) maybe minor, but is symbolically important and representative of a bigger issue or problem (Patton, 2002). The critical incidents selected for discussion here fit one or both of these criteria. The first section uses

critical incidents arising from staff interviews and residents' focus groups to explore residents' challenges to managed and accepted forms of residents' participation. The second section uses critical incidents to examine RVO control in areas that were either explicitly non-negotiable even though contested by residents, or areas hidden and largely invisible to residents.

Contested Domains of Resident Participation

Contested domains concerned tensions where residents expressed alternative aspirations from those expected of them by RVO employees and management. The following sections explore examples of text that illustrate three kinds of tensions. First, tensions were experienced when residents interpreted that the RVOs stated one thing and did something contradictory. Second, tensions were experienced when the *governed* challenged the *government*. Third, tensions were experienced when the residents challenged RVO representations of them and, in so doing, RVO brand identity.

Residents' Participation as Challenging Role Expectations

Corporate rhetoric generated expectations from residents, and corporate representations of residents' roles in the organisation attracted residents' comments. This is illustrated by the next two excerpts where residents connect RVO texts and RVO inaction. Sheila, the first speaker refers to a by-line "retirement living for 55-plus" and Todd, the second speaker, refers to a "spout" by a board member. The "spout" metaphor suggests a promotional presentation to residents – or as one village manager called it "a bit of rah-rah". References to RVO texts suggest that residents expected more than the "active lifestyle" and "beautifully-appointed" amenities of the promotional brochures:

They should look at the aim of their company – they should look after that, stick to it – remember that we're the 55-plus and it's our

retirement living, it's our place where we live but they don't—they don't—they seem to think they do. . . (Sheila, Resident, Focus Group Excerpt 25)

I believe a retirement village—especially after this spout we got from [Board member] right at the beginning—that the residents are the most important thing in this village, that's my belief, and I think the residents' interests have to be paramount and they are not paramount—they are not paramount and I think we are gradually getting them to understand more and more—especially as they're spreading their wings into other places and they are getting more comfortable with their financial mood. I think they're listening more and more but we have still got a way to go. (Todd, Resident, Focus Group Excerpt 26)

Sheila refers directly to residents' *sense* of ownership in the village: "we're the 55-plus" and "it's our retirement living". Moreover, she suggests that the RVO actively nurture its aim ("look after"), align its actions with the aim ("stick to it"), and keep at the forefront ("remember") the residents who make the village what it is: a place to live. In other words, the RVO should practice what it preaches. Thus, Sheila implies that RVO *action* communicates something different from RVO *rhetoric*. Both statements repeat sentiments expressed in the negative: "they don't" (act in accordance with the stated aim) and (the residents') "are not paramount".

At one level, these responses appear to be alternatives to the preferred readings (Hall, 1993; Foss, 2004; Locke, 2004) desired by the RVOs. It may be surmised that the RVO either purposely employed *strategic ambiguity* (Eisenberg, 1984)—that is, where one term is used to cover apparently diverse situations (Burke, 1945/1969; Cheney & Tompkins, 1988) in the statement—and/or failed to consider that residents could interpret the by-line either literally or in a way beyond what was intended: a leisured lifestyle.

This leads to another level of analysis. Sheila seems to suggest that the RVO needs to demonstrate its *commitment* to its identity claims by recognising that residents *are the village* (e.g., "we're the 55-plus" and "it's

our retirement living"). Sheila's phrase "they seem to think they do" suggests a disjuncture between what the RVO says and how residents interpret what the RVO says. It also implies that the RVO is not listening to residents, and therefore not enacting *commitment* to residents: that is "binding to 'action'" in everyday relationships with residents, the promises of the identification-inducing statements of the promotional material.

Todd's excerpt is interesting in that it highlights the *agency* of the residents: "we are . . . getting them to understand". This indicates that the residents expected something different from current organisation and employees' practices. The metaphor "spreading their wings" suggests a growing organisation (with the associated financial challenges) and is also evocative of *newness* in the business and possibly a lack of experience in the organisation. In some ways, this could be deemed to be negatively characterising the RVO as part of an "us" and "them" relationship. Yet, the "listening more and more" and "got a way to go" imply an *expectation* of ongoing communication between residents and employees of the RVO. Implicit in the texts is that change is *negotiated*.

Thus, once again, there appears to be some kind of tension, this time between RVO and residents: that is, expectations are not matched by experience. Todd implies that meaning is being negotiated in communicative activity between residents and RVO. In terms of practical day-to-day events, it would seem that residents of these retirement villages were prepared to push the boundaries of *acceptable* (i.e., *RVO managed*) resident participation and negotiate ongoing change. These people may be described as "ideal residents" because they are aware of village issues and intent on addressing them with the management (Seigal & Storm, 1968).

Residents' Participation as Advocacy and Interference

The second example centres on the framing of resident self-initiated participation. The situation concerned a resident who got involved in

aspects of management and this was simultaneously framed as a case of *advocacy* and *interference*. This excerpt is from the village manager:

Peter's one [resident] where we've actually probably given him too much information. He's now phoned [the Power Company] wanting all the information that [the Power Company] are giving me – we're working through a problem with [Power Company]. . . . Peter is wanting to come in and be totally involved in this one little thing. He's also demanding that we get a residential line in here now – I've been told three times that I couldn't – he's now found another way that we can but it means I've got to put in a new business line which is going to be so much more expensive than our ordinary one – he's going "[I] don't care about [RVO]. All I care about are the residents and we need this residential line". And so we are working with that – so we work with those sorts of issues all the time. (Village Manager, Interview Excerpt 14)

Earlier in the interview the village manager describes Peter as sometimes "interfering" and yet here she says that the organisation *gave* him "too much information". Here he is "demanding" but later in the interview the manager states that "at the end of the day, long-term it's going to be really worthwhile". She acknowledged that Peter had identified issues in the residential agreement and the prospectus that the RVO had either missed or not anticipated having problems with. Therefore, although it was often difficult for her to be in the middle of problem solving, she believed both parties were well-intentioned, and that the residents and the RVO would benefit from the outcomes.

The ambivalence expressed by the manager appeared to be the result of a conflict of role expectations: that is, managers manage and residents reside. The resident in this case took on management tasks, but he framed it as caring about the residents – i.e., being *customer-focused* in terms of market-oriented discourse. This perspective was aligned directly with the corporate position. The situation was clearly difficult for the manager: that is, the resident took over her management tasks *and* used organisational rhetoric to justify his actions. *Yet, underlying this description is a willingness to engage with the resident's issues.*

Applying Galbraith's (1978) motivational forces to this situation suggests that Peter's actions involved changing RVO practices to align more closely with his own values and goals. His expressed commitment to residents suggests that he may want to *change* organisational goals. Using, Tompkins and Cheney's (1987) commitment-identification relationship, Peter would appear, at first, to be an "anti-resident": That is, he challenges the RVO management while living at the village and involves himself in organisational domains. However, Galbraith's adaptation motivational force may explain his continued living in the village and his extensive involvement in management affairs. His commitment to residents may be viewed as an expression of his motivation to change RVO practices and influence RVO goals.

Another feature of the narrative is that the manager indicates she was constrained by the organisation whereas the resident was not: The manager's responsibility to the organisation was expressed in her concerns about the "more expensive" line. In this light, it is possible that the resident's action *enabled* the manager to appear accountable to the organisation while being responsive to the resident. This seems to echo the business-customer contradiction identified earlier: that *residents both excused the organisation because it was a business, as well as expected the organisation to treat them well because they were customers of that business*. The manager expresses ambivalence about Peter (a customer) demanding things that met residents' (other customers') needs, yet these were things that cost the RVO (the business). In this respect, the village manager seems to identify with the RVO, but also demonstrates commitment to the residents. That is, she simultaneously identifies with the RVO and residents, but her expression (through action) of her identification with residents is restrained by her employee contract with the RVO. Thus, Peter's actions prove a useful "out-clause" for her.

The final statements about "working with that" and "we work with those sorts of issues all the time" suggest not only a negotiated

relationship between residents and staff, but one that relies on engagement of individual staff members – in this case, the manager – with the resident. This point echoes earlier observations: that how a given manager responds to unexpected forms of resident participation determines the process of residents' participation.

Importantly, other residents saw the benefit they got from residents like Peter. They expressed the view that they themselves would not, or could not, be involved in the same way. One resident said, "Peter has got the skills to handle this situation that crops up whereas a lot of us are just ex-truck drivers, plant operators, business people. . . . he has got the skills to meet management". This resident seemed to distinguish between people who owned and ran their own businesses and those who worked in management roles. Others said they did not have the interest or time to be involved in this way, but supported him. Several residents said they had a choice about getting involved like Peter, but prioritised their social life instead. Others were grateful for Peter's work which they called "serious management" and labelled him an advocate and "watchdog".

Interestingly, in another domain of activity, some residents did not like Peter's action. For example, consider this excerpt from a letter by a group of residents to the manager:

We feel that we are wasting our time at these [consultation] meetings and are frustrated by the lack of progress. The behaviour of [Peter] has caused this reaction and we feel that it seriously jeopardises the purpose of such discussions. The mechanism for handling personal dissatisfaction is available to any resident with a justifiable complaint without dominating the group trying to provide constructive input. We will support the idea of providing input to the concept [of ongoing development] but we prefer to do it under more constructive guidelines. (Residents' letter to village manager)

Clearly in these residents' eyes, Peter had overstepped the idea of *reasonable* complaint – at least in this forum. While they found his actions useful in other areas (e.g., addressing power accounts and telephone services), they clearly did not like his behaviour because they viewed it as

interfering with their involvement in the RVOs consultation processes. The level of the writers' concern is evident in their use of adjectival phrases such as "wasting our time" and "seriously jeopardises". The writers' technical language such as "mechanism for justifiable complaint" attempts to formalise the issue and distance them from it. However, emotive terms such as "frustrated" and "dominating" reveal the writers' experiences of the situation. Moreover, the writers subtly discount and negatively characterise Peter's behaviour. The adjectival phrase "personal dissatisfaction" signals that Peter's dissatisfaction is not theirs. Likewise, "justifiable complaint" suggests Peter's complaints are not justified. In other words, Peter's actions are not accepted in this forum where other residents wanted to be heard. In the domain of working *against* management on behalf of residents, his actions were accepted, but not when he appeared to be working against, instead of alongside other residents.

These examples support the view that residents see themselves as possessing *customer (or owner) rights* which require serious – meaningful – participation by at least some members of their group. However, there is a degree of tension between RVO enactment and residents' expectations of customer focus. Also, amongst residents, if a resident appears to exclude other residents in advocating for change, then his or her actions were deemed unacceptable.

Interestingly, in the case of Peter, the writers appealed to the manager rather than deal with Peter's behaviour themselves. This may have been because the village manager set up the original group. However, it may also indicate issues about relationships: That is, these residents valued Peter's actions in other areas and may not have wanted their complaint to be known to him and therefore negatively impact on his ongoing efforts.

In the light of these excerpts it may be seen that resident participation in managerial domains benefits both the organisation and

residents practically. The choice to be involved, actual resident involvement, and in partnership with a manager who allowed or encouraged participation, clearly changes organisational communication processes – and actual facilities and services for residents. This manager, this resident, and the issue were not unique to this village: These themes echoed across all of the villages in some degree or another. It may be surmised the residents' desire to influence RVO goals and practice may be a central motivating force behind their participation in RVO activities.

Residents' Participation as Protest and Communication

Another critical incident was interesting because it involved residents challenging the RVO on what they perceived to be representations of their village and therefore, *themselves*. The residents of one retirement village “basically boycotted the new van” – in the words of the sales/marketing manager – because of the new sign-writing on it. (The van was a service for residents who no longer drove or an alternative means of transport for those who did own vehicles.) One resident described it in this way: “It had a photograph – a painting of grandma coming down on a parachute [with] granddad sitting out on the porch with a red martini and there was a spa pool [as well]” (Resident, Focus Group). Throughout the focus group session, residents continued to return to the subject of the van. Here is one part of the conversation:

Ron: And it looked – oh god –

Faye: Oh it was just ridiculous –

Ron: And you got all the – – and they also covered up all the windows with that sort of non-see-through from the outside and you could barely see from the inside out either.

Faye: And we called it our – – what was it called?

Maurice: It was called the “loony bus”.

Faye: No, it was called the – – It was called the –

Ron: When you went into town people didn't want to go in it 'cause it was too embarrassing so eventually they took it all off.

Sylvia: It was a shocker.

Ron: But I think that in sign-writing a van for a place such as this it's got to be done in a dignified way. I mean you don't want a playtime fun-bus-thing out of it— —I mean it's obvious it's a bus belonging to [this] village and that's fine.

Sylvia: It looked a bit like a kindergarten.

Jack: It was very bad. (Residents, Focus Group Excerpt 27)

At different points during the focus group, the residents called the sign-writing “diabolical”, “a shocker”, “ridiculous”, “embarrassing”, and “stuff”. This kind of hyperbole combined with the time spent in the focus group talking about the van indicates not only the level of residents' concern, but also their almost disbelief that the RVO could sanction something like this. In the excerpt above Maurice calls the van the “the loony bus” and later Faye calls it “the kindy cab”. Each of these terms implies a sense of silliness or craziness, and an association with people not in control of their faculties. The cartoon depiction of normal recreational activities and older people seemed to distort both. This distortion usurped the RVO's preferred reading of the sign-writing as active older people with one that negatively characterised older people and their activities by making them look silly.

On the other hand, the sales/marketing manager called the brand (as evidenced in the sign-writing images) “effervescent”. Clearly, residents did not want to be represented by what they saw as caricatures of older people (caricatures designed by younger people, indeed). As Ron said in the excerpt above, “You don't want a playtime-fun-bus-thing . . . it's obvious it's a bus belonging to [this] village and that's fine”. The pronoun “you” is used to refer to residents like him. Ron, like others, did not identify with the caricatures of older people having fun and saw the

images as misrepresentations of older people. However, the residents understood the need to represent the van as being affiliated to the village. That is, they understood the need for RVO identity statements, and they wanted images and statements that they as residents could identify with. Moreover, they clearly understood that they as residents had the power to exercise in this instance – power that the RVO recognised.

The sales/marketing manager called the residents' reaction a "significant rejection of these lovely vans". To address the issue quickly, he travelled some distance to "personally visit" the protesting residents. The first thing to note about the manager's talk is how he uses superlatives and adjectives to stress (a) the importance of the issue and (b) his own efforts at solving it. This pattern of word use is consistent throughout his description of the events, for instance: "*significant rejection*", "*personally visit*", "*fantastic result*", "*totally onboard*", "*pretty powerful*", and "*fantastic exercise*". Each adjective is designed to stress the significance of the overall event.

Finally, two issues become apparent from the sales/marketing manager's point of view: (a) residents believed they had not been consulted; and (b) that what residents wanted was not the RVO's brand. In terms of participation this incident reveals how protest can lead to co-decision.

In the following excerpt, the sales/marketing manager talks about the subsequent communication process with residents. There are three parts to this excerpt. The first and third (identified in the text below) mirror each other in structure and content, but use slightly different verbs. Both are action oriented as evident in the "noun-action" format and both focus on the RVO's actions. Each part essentialises the process as problem identification, agreement, and positive outcome and emphasises the organisation's role in it.

[Part 1] It was simply what they wanted and what we believed we wanted were poles apart, we reached agreement and the fantastic result is that they're all totally on board about it now and that's pretty powerful in the village because we've listened, we've adapted, they've had to adapt what they want, and with certain non-negotiables for us, we didn't want the brand compromised. [Part 2] And in that communication process, there was the realisation that what they wanted as a lifestyle village is not our brand, so we had to maintain brand integrity right throughout, but explain to them why that was important to us, and we accommodated their request for identity within the village they live in. . . . so now we have brand identity, we have village identity and when people drive down the street in that van, they're not now embarrassed or whatever, about pulling up outside the RSA in what they were calling the lollipop van before. [Part 3] So it's a fantastic exercise in saying "right we've made a mistake, let's back-pedal". We clarified that, we walked forward with clearly defined goals, we needed brand integrity and to accommodate what they wanted. (Sales/Marketing Manager, Interview Excerpt 15)

The verb metaphors in Part 3 – "back-pedal", "clarified", and "walked forward" – help to convey the sense of change experienced by the speaker. Also, each underscores the level of control the RVO had in the situation. In contrast, the lack of references to residents' action is conspicuous. The residents' role figures passively – something happened *to them* ("they've had to adapt") – or their action was tagged with a negative ("what they wanted . . . wasn't our brand"). In presenting the story this way, the manager fails to acknowledge residents' contribution – i.e., active participation – in the change. In so doing, he locates *agency* with the RVO.

Furthermore, the manager's language-use reveals the extent to which marketing communication discourse infuses this text. A customer-focused organisation cannot appear to disparage its customers or make decisions that negatively affect customers; yet it has, somehow, to maintain control. In addition, the truism that marketing communication discourse is by nature self-promotional, applies here. In telling his story the manager needs to appear both responsive to residents and in control of

the situation, so his lexical choices downplay residents' agency and emphasise his own. Thus, the act of telling the story is an act of self-promotion.

The centre of a text often reveals key points in the discursive progression (Cheney & Tompkins, 1988) and in the middle section of this text the focus shifts from process to outcomes. In so doing; it throws into relief the central issue: identity. The "communication process" enabled a "realisation" to emerge – although for whom, is not stated. However, the repetition of the term "brand identity" throughout the text emphasises the importance of the issue for the speaker as representative of the RVO. The issue of RVO identity is mirrored in the text itself in that he focuses on "we" and "what we did" throughout the story. Only once does he refer to residents' identity: that they wanted a "lifestyle identity".

The sales/marketing manager had earlier described the village vans as "product placement in the market". If the van was product placement, the residents were also "product" placement. He also stated that the residents "boycotted" the van, indicating that they had a keen sense of who they were when they rode in the van: that is, they represented the village. What was more, *the van represented them as a "brand"*.

It is worth noting that the villagers' descriptions of the meetings with management were more emotive than the sales manager's carefully articulated steps of "clarified", "back-pedal", and "walked forward". They were scathing about the initial communication process around the original van painting: "they didn't communicate with us about it", it "was sprung on people", and the RVO "did not consult" (Residents, Focus Group). The directness and intensity of these comments contrast with the manager's strategically ambiguous statement that he found that residents "believed" they had not been consulted. Residents also described the negotiation of the new sign-writing as "some really hostile meetings and it [sign-writing] came off" (Resident, Focus Group). Consider this particular statement:

We had big discussions on our bus. We had big discussions on our bus because they were going to put “retirement village” on it and we went berserk, the [residents’] committee went berserk. (Sylvia, Resident, Focus Group Excerpt 28)

The description of the meetings as “hostile”, along with the repetition of “big discussions” and “went berserk” emphasises the level of feeling among residents. This suggests that residents did more than quietly “adapt” to management’s need for “brand integrity”. While the text “retirement village” had to stay, the RVO changed the images on the van and therefore “accommodated” the residents’ wishes. This suggests that residents had a greater level of agency than accorded them by the manager.

The upshot was a co-decision involving residents and RVO staff. Both residents and the sales/marketing manager agreed that the outcome was good and that they had learnt from the experience. In this way, the decision may be seen as one that transformed RVO practices. Clearly residents had influenced the RVO to adapt expressions of its brand identity in a way that more closely aligned with residents’ own sense of identity. Such a result may encourage residents to participate further in RVO affairs. Residents expressed the view that the RVO had “come a long way” and that there “was still a long way to go” (Residents’ Focus Group). Yet, at the same time, the residents’ efforts, and subsequent success, in this modification of RVO policy could suggest an increase in residents’ motivation to be involved.

In light of these excerpts it may be seen that resident participation in managerial domains benefits the RVO and residents in practical ways as well as in terms of aspirations. The choice to be involved, actual resident involvement, and partnership with managers who allowed or encouraged participation, clearly contributes to organisational communication processes, facilities and services, as well as representations of residents.

In terms of Bernstein’s (1976) three dimensions of decision-making,

these examples illustrate a move by residents into new domains of participation. Corporate rhetoric, phone lines, power accounts, or brand management are not usually the domain of retirement village residents – even though these may be of concern to them. Phone lines and power accounts are normally the responsibility of village operations staff, and brand management the responsibility of corporate staff. Thus, residents are not passive followers of RVO decisions; rather, in these instances, they individually and collectively resisted RVO management decisions. These forays into managerial domains appear to be based on residents' views that their financial stake in the organisation gives them the right to express a view and get involved with issues that they think directly affect them. Moreover, their identification with the RVO, and their hopes for adaptation and transformation of RVO goals and practices, may also be motivating influences for residents. However, the roles that individual staff members play in responding to residents' resistance also need to be considered. The tension between identification and commitment to the RVO, and commitment to residents is evident in their balancing acts of managing to meet customers' needs as well as serve RVO goals (e.g., business and brand issues). The underlying organisational expectation of staff was that they managed the involvement of the *governed* (residents) with the *government* (management).

Participation and Control

This part of the chapter explores areas of RVO control that were either explicitly non-negotiable even though contested by residents, or areas hidden and largely invisible to residents. In both domains the RVOs demonstrated their capacity to control residents' participation both directly and indirectly. Of central concern is the role of the employee who, through inherently communicative organisational structures (McPhee, 1985), influences the very processes and choices of residents' participation.

These examples illustrate discursive structures relevant to the study

at hand (van Dijk, 2004), such as the contribution of discourses of marketisation and ageing to the construction of resident participation in retirement villages. They illustrate the power of the RVO to privilege representations of itself and villages in particular ways, over residents' expressions of social and material needs. The first example concerns a clash between residents and RVO where the RVO privileges its identity claims over the material concerns of residents. The second example is taken from an interview with an employee in an administrative role, whose tasks included coordination of residents' activities. This person demonstrates the very real power of individual staff members to control village life. The application of Bernstein's (1976) three dimensions of decision involvement and Lukes' (1974) dimensions of power reveal the limits of residents' participation in retirement villages.

These events need to be considered within the context of expressed RVO values and identity (identified in Chapter 6) and the marketing principle of customer focus. RVOs aim for prospective residents to identify with their company and expressed organisational values as represented by the role of the built environment. The references to the physical "bricks and mortar" suggest that the built environment serves as a *progressive rhetorical form* (Burke, 1966a): That is, the actual village leads prospective residents and visitors "to anticipate or desire certain developments" (Burke, 1966a, p. 54). Just as Vale (1995) argues that symbols of the built environment and architecture communicate to people, Burke (1950/1969) argues that nonverbal conditions can be considered rhetorical "by reason of persuasive ingredients inherent in the 'meaning' they have for the audience to which they are 'addressed'" (p. 161). In the case of RVOs, the built environment seeks to induce prospective residents to identify with the *place* and as a consequence, with the *RVO*. For instance, consider this concise statement about organisation and implied customer needs:

We would like to be seen as sort of first choice retirement village living – that if you are looking at the picking of a retirement village, [this RVO] will be able to offer you a very good product, well-built comfortable home and value for money, quality and service, modern, fresh ideas, a degree of status and a sense of well-being. If you live in a [this RVO] village, it makes you feel fitter and healthy. (Senior Manager, Interview Excerpt 16).

This excerpt has three parts: RVO product; RVO values; and benefits for residents. It may be considered a *sylogistic* form of rhetorical progression (Burke, 1968; Foss et al, 2002) in that it progresses step by step so that the audience is led to expect certain outcomes. It may also be considered a *qualitative* form of rhetorical progression in that “the presence of one quality prepares us for the introduction of another” (Burke, 1968, p. 124–125). Either way, analysis reveals three steps of rhetorical progression.

First, the senior manager uses adjectival phrases to positively characterise the product: “very good”, “well-built comfortable”, and “value for money”. The specific references to the *quality* of the built environment suggest that this is the first step in the progression because on entering the environment (physically or conceptually), people begin to expect certain things to follow. As mentioned in Chapter 6, the hotel-like environment suggests *holidays* to residents. The quality of the environment prepares the ground for the (possibly not considered) option of *living in a hotel*. In the next step, the speaker makes explicit references to *RVO values* associated with innovation. This is demonstrated with the use of the adjectives “modern” and “fresh” to describe “ideas”. As the second step in the rhetorical progression, the specific links between the built environment and RVO attributes lead the audience to consider the RVO itself. The final step is where the senior manager suggests that these RVO qualities give prospective residents *what they want*: that is, “status”, “well-being”, and personal fitness and health. The RVO appears to link its values, with personal identity issues. Particularly noteworthy is the concept of “status”, for it implies that retirement village living grants

residents a certain kind of identity and one that is better than if they lived somewhere else. "Status" echoes themes of positional and conspicuous consumption, suggesting that lifestyle choice communicates preferred identity claims of older people; that is, they are "fitter and [more] healthy" than others living in neighbourhoods or rest homes.

It is at this point that the significance of the built environment becomes clear: It provides the rhetorical link between the RVO and individual. As prospective residents ally themselves with aspects of the village environment and architecture they begin to share substance with the RVO: "As two entities are united in substance through common ideas, attitudes, material possessions, or other properties they are consubstantial" (Foss et al., 2002, p. 192). The aim appears to be to induce individual *identification* with the RVO.

Finally, implicit in this short excerpt is that the RVO is *customer oriented* because its *values* match the residents' need for a particular sense of self-concept. That is, as customers, residents expect their needs to be heard by the RVO. However, as the following situations illustrate, there appear to be limits on what defines *customer* need when organisational identity and image are prioritised.

RVO Identity Claims and Residents' Needs

This first situation concerned residents' requests for rails in bathrooms and toilets as fall prevention measures. The RVO refused "point blank" and argued that the village was for "independent living" and not a "rest home" (Residents, Focus Groups). Consider this narrative from Sam, a resident:

So I pushed as soon as I saw this place, I pushed for handrails in the showers. They've refused me point blank, all the way through . . . Now the ridiculous thing is that they put bell-pulls in the showers, so that you can summon help, right outside so that you can summon help while you're sitting on the loo. They recognise that they're risky places, but they don't put in the means for *preventing* the fall in the first instance. They put in the means for summoning

help when you have fallen down, and you can't get up, but they don't put – – start it off with the preventative attitude. You see the basis of occupational health and safety is prevention and this they will not accept. We offered to, through the village manager – – and the village residents, we offered to – – if we bought them, would they install them? No. They've been promising them now for 12 months – we have not got one installed . . . they came up with – the reason for not having this was the fact that this was not a rest home, therefore there was no requirement. (Sam, Resident, Focus Group Excerpt 29).

The patterns of oppositional statements in this excerpt indicate the level of feeling experienced by Sam in the relationship he describes. His repeated use of the verb “pushed” followed by the oppositional reaction “refused point blank” and emphasised by the alliterative “p” plosives, sets up an “us” and “them” relationship. Sam and the residents are on one side, and the RVO is on the other. Early on in the text, Sam characterises the RVO's behaviour and stance negatively as “ridiculous” and as he proceeds to demonstrate why, he characterises his own stance positively by credentialing his position on the basis of occupational health and safety.

Sam uses a pattern of *they-did-this-means* sentence structures that feature the RVO as prepared to install the means for summoning assistance, but resistant to installing the means that could prevent the need for that assistance. Sam finishes in the same way he begins: in a position where he is faced with “point-blank refusal”, the RVO having taken refuge in regulations that require rest homes, and not retirement villages, to install rails.

The relationship is also oppositional because competing discourses underpin their respective positions. Sam aligns himself with health and safety discourse, while the RVO's position appears consistent with positive ageing, active retirement, and leisure and lifestyle discourses. *Yet, these very discourses prevent the RVO from acknowledging material reality.* The official RVO stance is that there is “no requirement” to install handrails in dwellings – a reference to official standards and regulations for rest

homes. However, the unspoken premise is that for this RVO there is no place for *symbols* of material ageing (i.e., ageing-as-decline) in its resort-style retirement villages designed for active leisure. In other words, potential material needs of residents come second to identity claims of the RVO.

The second example is similar to the one above, and came to light at an informal meeting between residents and the village manager, which I observed but did not audio-record. The incident concerned Jim's complaint to management about "aliens" who used the village facilities for line dancing. The "aliens" Jim referred to were members of a local dance group that had been invited to set up classes at the village soon after it opened. This was part of the RVO's relationship marketing programme to bring outsiders into the village. Some years down the track it had developed into a weekly, all-day dance session and no longer provided classes for residents although residents took part in the dance sessions. As Jim said, "I don't mind our lot doing line dancing but why do we have aliens from outside the village?".

The manager acknowledged Jim's issue about noise directly outside of his dwelling, but also pointed out the importance of having community groups at the village "from a marketing point of view". Thus, in the same way that the RVO's need for identity management took precedence over residents' health and safety, so the RVO's need for community relationships took precedence over the daily-living needs of the residents. What's more, the residents had little control over it. In both cases the power of the RVOs to prioritise future customers over present customers' needs was clearly evident.

These examples illustrate different RVO approaches to communication with the second example being more transparent than the first both in issue and RVO response. Here the interaction between resident and manager is more immediate because the manager responded directly and openly on the spot.

In relation to the first example, it is significant that after the appointment of a new senior manager, Sam and other residents said “things changed”. The new manager was far more amenable to installing rails and on the whole far more willing to listen to residents than the previous person. This outcome raises questions about the impact of RVO goals and values, and employee enactment of their role, on residents’ capacity to participate of an individual manager’s interpretation.

These two examples were the most vivid from across the six villages. However, they illustrate the limits of current-customer focus when residents are long-term customers and the RVO must simultaneously create and maintain relationships with prospective customers who identify with RVO representations of retirement living, retirement villages, and company values.

These examples also demonstrate the real power of the RVO in terms of control over the physical environment and what is communicated to the “outside”. The retirement village is not only a place for residents to live and claim identities associated with positive and active ageing; they are also vehicles for the RVO to communicate its own identity claims and values. The built environment communicates to people who they are and how they fit in with others (Vale, 1995). In relation to retirement villages, the physical place and space communicates to residents and RVOs, as well as others in wider society. The RVOs’ cognisance of this is revealed in their efforts to ensure that the built environment reflects (or at least suggests) organisational values and goals.

Coordinating Activities or Controlling Residents?

Retirement village employees spend their working days in contact with residents and share in common with residents the creation and maintenance of the village as product. This raises questions about what residents may expect from staff members who may feel a sense of belonging in “their” workplace, as much as residents sense belonging in

“their” community. It also raises issues of power and control, residents’ rights, and staff duties. The following example concerns resident-employee interactions that seem to be unobserved and/or unquestioned within RVOs. This is not to say that this particular employee and the text are *representative*. However, the text is another example of “actions not deliberately constructed . . . [that] can be interpreted symbolically” (Foss, 2004, p. 5).

Sharon was the activities co-ordinator at a village promoted by the RVO as resort-style living. The excerpt is from a section in the interview where Sharon talks about residents’ social events and activities at the community centre:

We don’t encourage cups of teas in each others’ homes, that’s something I frown on and they know it. They know I don’t want cliquey little groups, like I talk about it all the time and I say, “Oh, I’d hate to see that happen in our village because that’s where trouble starts”. So what we do is we have endless cups of teas [in the common area] . . . they come here and have a cup of tea. There’s always a cake, there’s always a cup of tea, there’s always whatever they want because that’s — — this is the community, not each others’ homes because you start that crap and before you know it you’ve got problems and so and so is whispering about so and so . . . so we don’t have that. If they want cups of tea they come here and what I say to people is if you want privacy, shut your door and no one will bother you, but I will if I don’t see you. That’s the standing rule before they come in, but they sit on their front porch and before you know it — — or they’ll sit on those seats out there and they’re like birds, come, go, come, go. People, different ones all the time, or if someone comes in here, someone else will always come over to see what’s going on . . . Someone else will come over for something and there will be another little flurry and that’s what it’s like — they want to know what’s going on so they all come and [go] . . . but it’s not in their homes. So it’s not this “so and so’s been going in there because — —”. Ain’t going to have that — ain’t going to happen in my village. I’ll probably lose control eventually.
 (“Sharon”, Village Employee, Interview Excerpt 17)

I discuss this excerpt in three ways. I begin with the topic of Sharon’s first rule that residents should not have “cups of teas in each others’ homes”. Next I discuss the second rule which is in two parts (a) “if

you want privacy shut your door and no one will bother you, (b) but I will if I don't see you". Finally, I discuss residents' compliance with these rules.

Locations of key terms within the body of a text may indicate the significance of those terms (Cheney & Tompkins, 1988; Foss, 2004). Sharon's first rule seems to be very important because the phrase "not in each others' homes" occurs at the beginning, centre, and end of the text. In this way it anchors and structures Sharon's story.

Metaphors associated with Sharon's first rule, concern two topics or tenors (Foss, 2004): social activities and residents' behaviour. The dominant metaphor or vehicle (Foss, 2004) for *social activities* is "cups of teas", which occurs five times in the first half of the text. Sharon negatively characterises social behaviour associated with residents' homes in her used of terms and phrases such as "cliquey little groups", "trouble", "crap", "problems", and "whispering". "Crap" in New Zealand vernacular means rubbish, useless, or worthless. Thus, Sharon *denigrates*, as a form of social activity, residents having "cups of teas in each others' homes". Her descriptions are *distortions* of normal social behaviour and are consistent with negative discourses of ageing that attribute negative behavioural characteristics to older people (Nuessel, 1982; Palmore, 1999).

In contrast to this attitude, Sharon positively characterises socialising at the community centre. The repetition of "there's always" in conjunction with "cake . . . cup of tea . . . whatever they want", suggests residents have no need to socialise in each others' homes. Also, the phrase "this is the community not their homes" is particularly important because it claims (a) that community is a place within the village rather than the people and (b) that the village centre is the source of community.

The metaphors for residents' behaviour are also revealing. Sharon says residents are "like birds" (a simile) in their behaviour in and around the community centre. They "come, go, come, go" in flurries of activity. These lexical choices possess onomatopoeic qualities that suggest ongoing

yet fragmented interaction between residents. Sharon discursively highlights the attraction of the community centre, while negatively characterising residents as passive and reactive. In so doing she further distorts residents' social behaviour and privileges her reality as the only valid one.

Another aspect of this rule concerns the transcendent or assumed "we" (Burke, 1950/1969; Cheney 1983; Cheney & Tompkins, 1988; DiSanza & Bullis, 1999) that Sharon uses at the beginning of the text: It implies that residents support the rule. However, at the end of the text her repeated and emphatic "ain't" and the pronoun "my" reveal that the "we" is really "I". Thus, Sharon claims ownership and control of the village and in so doing, relegates residents to subordinate participatory roles.

The final aspect of Sharon's first rule is the term "here", referring to the location in which Sharon was present at the time of speaking: the village centre. Sharon's office opened onto the community area and from there she could see most of the village, observe residents, and even become involved in residents' activities. Thus, Sharon communicated control *physically* by virtue of location, as well as *discursively*.

The second rule appears only once and is located near the rhetorically significant centre of the text (Cheney & Tompkins, 1988). Its single appearance and key location throw it into relief. It is a statement in two parts, with the second part contradicting the first: That is, (a) residents have privacy if they shut their door and (b) Sharon will call on them if she does not see them. The discourse infusing these statements appears to be based on safety and the risks associated with material ageing, such as illness. However, the negative tone of the remaining text suggests that ageism infuses this rule. That is, employees may assume the right to call on residents without their express consent or invitation, because residents are older and not because they require visiting.

Interestingly, Sharon's rules echo nineteenth century old age homes where rules for "inmates" aimed to "circumscribe all situations likely to

lead to disorder" (Tennant, 1989, p. 155). The rules meet Sharon's need to avoid problems rather than support residents' participation preferences, and therefore challenge RVO rhetoric about residents' lifestyle choice.

Residents in the village did not question Sharon's position, authority, or rules. Compliance is indicated in the references to residents sitting "on their front porch" or "on those seats" in the area outside the community centre. These actions may also be read as residents' communication strategies to manage the constraints of Sharon's rules. Such compliance is therefore similar to employees who rarely question organisational structure, rules, or decisions (McPhee, 1985). In fact, the residents described Sharon as "just marvellous" (Residents, Focus Group). In terms of Lukes' (1974) model, the acceptance and enactment of Sharon's rule illustrates how RVO structures and procedures obscure Sharon's individual power and create an image of consensus. The sentence "that's something I frown on and they know it" indicates that Sharon's authority is dominant and suggests that because Sharon is a representative of the RVO, the rule is naturalised and obeyed by residents – even though the rule disadvantages them. Sharon acts *as* the organisation, although not necessarily as the management of the organisation would want, and residents acquiesce.

Another illustration of hidden power is the "standing rule". The non-negotiable nature of the rule and the fact that residents knew about it "before they come in" together imply acceptance of the rule as a condition of entry to the village. On the surface this rule appears to be organisational (rather than Sharon's) and to benefit residents in terms of personal safety. However, it also disadvantages them in terms of personal privacy.

Finally, rule enforcement and residents' acceptance of the rules is reinforced in Sharon's talk. Her statement, "I talk about it all the time and I say 'Oh I'd hate to see that happen in our village. . .'" helps to discursively construct village life. The use of the possessive adjective-noun combination "our village" dissuades objection and invites collaboration

from residents by calling on, ironically, a sense of mutual ownership. Thus, through Sharon's organisational rules, positional authority, and controlling talk, residents apparently complied with rules that compromised their participatory choices.

Critical discourse analysis brings into focus relationships between discursive, social, and institutional practices (Fairclough, 1992). In this critical incident, the rules as structure and process, and the discursive and practical enactment of them influenced the very opportunities and processes of resident participation. Sharon's rules, like other apparently neutral organisational processes and structures went largely unnoticed by the residents – and unobserved or unquestioned by the RVO (see Hardy & Clegg, 1999; Lukes, 1974).

Interestingly, parallels may be drawn with Foucault's (1984) panopticon where the prison warden can watch every prisoner without the prisoners being able to see the warden. Sharon's rule and her physical location enabled her to watch residents go about their everyday life within the village largely unseen. Thus, even though RVO rhetoric promoted residents as free to participate as little or as much as they desired, in very real terms, residents had little social privacy or control over that privacy.

Power relationships exist across society, and in this case organisational structures, roles, and processes helped to privilege the retirement village employee's interests over residents. That is, the employee's structural role and rules dominated residents' enactment of participation in the village and in ways detrimental to residents' individual and collective well-being – and went unrecognised. Finally, that the residents said Sharon was "marvellous" may render them unlikely to recognise hidden power (ab)uses and therefore, unable to resist (Lukes, 1974) staff practices, rules, processes, and structures that appear functional but disadvantage residents in terms of social and other participation in retirement village life.

The interview excerpt reveals the degree of control that is possible

for a single individual to exercise in her routine job that can *negatively impact on residents' participation*. In part the staff member over-stepped implicit organisational guidelines in the enactment of her role, and in part residents accepted her authority as "normal". Significantly, this excerpt is infused with attitudes and work roles that are often associated with traditional discourses of ageing and institutional living.

In summary, the outcomes of text analyses in this section indicate that the individual employee has the capacity to exercise enormous power in the retirement village setting that disables residents' participation. This may seem a contradiction of findings discussed in the previous section – that individual managers can influence residents' participation positively. Here however, residents' individual and collective resistance did not manifest in change. In fact it is revealed in employee actions that RVO prioritised its commitment to *potential* residents over current residents. Acting as the organisation, employees visibly exercised their power to exclude residents from decision-making. Thus, in terms of Bernstein's (1976) model of decision-making, residents' protests in domains affecting RVO goals associated with corporate image (e.g., hand rails as symbols of rest home care) or communication with potential customers (e.g., "aliens" in the village) were likely to be rejected. This locates residents' participation at Step 1 of Bernstein's model where residents' have the chance to voice views, but the management retain the right to reconsider the decision or not as the case may be (see Table 8.5 in Chapter 8).

In light of the above it seems that the constant in the variable responses to residents' protests is that individual employees *encourage* participation when there is potentially direct benefit for the RVO, and *discourage* when it may threaten communication with, and therefore sales to, potential customers.

Finally, the case of Sharon's rule demonstrated levels of hidden power available to individual employees in the discursive and practical construction of resident participation in village life. Other ideologies were

at work. That is, the discourse that employees belong in the village-as-workplace gives rights to employees to impose rules on residents. In addition, beliefs about ageing-as-decline and villages-as-institutions with attendant assumptions that older people need management legitimise the enactment of these rules. In addition, the residents did not recognise Sharon's use of power and actually participated in enacting rules that imposed on their right to privacy and choice about social activities. Significantly, they could not resist the imposition of these rules, because their expectations of Sharon in her role, organisational structures, and even discourses of ageing-as-decline created and maintained their position as *normal* and *natural*.

Summary and Conclusion

This chapter considered two challenging domains of residents' participation using conceptual tools of identification (Burke, 1937/84; Cheney & Tompkins, 1987), commitment (Cheney & Tompkins, 1987), and the motivational force of adaptation (Galbraith, 1978) or transformation. The first was contested domains in which critical incidents were used to illustrate the consequences of residents' challenges to expected roles. The second concerned issues of RVO or employee control that were either explicitly non-negotiable or hidden from residents.

There were four key issues to emerge from this chapter. The first concerned the demonstrable tension between RVO enactment and residents' expectations of customer focus. Residents took seriously RVO rhetoric about retirement living for active 55-plus and in this respect residents wanted RVO *action* to be consistent with their readings of RVO *rhetoric*. Also, residents challenged RVO representations of them that did not reflect residents' own identity claims. In both cases, retirement village residents were prepared to extend the boundaries of what is deemed as *acceptable* (i.e., RVO managed) resident participation. This suggests that residents' participation was in part motivated by identification with the

RVO goals and in part by their aspirations to change and influence RVO goals so that these aligned more closely with their own goals.

The second and related issue concerned the impact of the RVOs' need to manage relationships with two customer groups: internal, existing, and long-term customers, and external, potential, customers. This dual customer focus was seen in the tensions between the operation and development divisions of the RVOs. While development employees tended to focus on design and architecture, operations staff tended to focus on residents and relationships. The incident involving the request for rails showed that when residents' needs challenged RVO identity claims, the RVO's customer focus shifted to the external audience that aligned more closely with those identity claims.

Third, (also consistent with findings discussed in Chapter 8) was that retirement village residents saw themselves as possessing rights that entitled them to meaningful participation—even if they opted to leave it to others. The examples of Peter's involvement and the incident where residents complained about him, suggest that while residents' appreciated advocacy, they did not tolerate one resident's actions interfering with their own participatory efforts.

The fourth issue was the influence of the individual employee's enactment of his or her role. Whether in the role of a village manager or activities coordinator, the individual decisions, choices, and interpretations of RVO processes and position descriptions directly influenced the forms and processes of residents' participation. Moreover, as Sharon's rules indicated, an individual's actions could not only undermine RVO goals and values, they could undermine residents' wellbeing, and remain *hidden* from all parties—residents, the RVO, and other employees. On the positive side, "Coffee with Annie" (discussed in Chapter 8) demonstrates how the responses of another village employee unanticipated forms of resident participation can positively affect the processes of residents' participation.

In terms of Bernstein's (1976) three levels of involvement in decision-making, residents appeared to be limited to their own community. At the village level, RVOs vetoed the installation of rails to privilege its identity needs over the needs of the residents. Even though later another senior manager was prepared to reconsider, this incident demonstrated that at the village level the RVO *had the right to veto*: that is, residents' participation was below Step 2 in Bernstein's model where residents may initiate suggestions but managers usually reject them (see Table 8.5 in Chapter 8). However, as the "kindy cab" incident showed, residents assumed the *right to protest* about a corporate level decision that directly affected them at village level. In Bernstein's (1976) model, this would be Step 3. At this step, residents may initiate criticism and discuss them face-to-face with managers who retain the power to decide, but usually adopt proposals.

The critical incidents described above show that residents were not fearful of taking action – and in fact, saw it as their right to act. It is also important to note that residents demonstrated agency by claiming participatory roles in organisational domains normally the prerogative of management. The "kindy cab" incident showed that residents' *actions* (i.e., boycotting of the van) in conjunction with *voicing* their views with the sales/marketing manager, had an impact on their *physical* environment (the van), RVO *representations* of the brand, and ongoing *relationships* between residents and RVO. Thus, there were material as well as symbolic changes.

The incident of Sharon's rules revealed the full extent of the capacity of one employee to influence residents' participation. Lukes' (1974) three-dimensional model of power shows how, in not recognising Sharon's (ab)use of power, residents were unable to resist her rules or other organisational processes and structures that supported her enactment of them. Organisational processes appeared to be functional and therefore went unquestioned, even though they disadvantaged

residents in terms of social and other participation in retirement village life. In addition, while the significance of organisational structures and processes in terms of impact on residents' participation was demonstrated throughout the analysis, this incident revealed fully the role of organisational processes and structures in influencing the very nature of residents' participation.

Finally, competing discourses of positive and negative ageing as well as those of the market infused employee and resident expectations and enactment of participation. On the one hand RVOs claimed that residents were more than residents while residents themselves demonstrated that they expected to be treated as partners of RVOs rather than as only recipients of RVO services. On the other hand, discourses of ageism and medicalised ageing along with organisation-biased market discourse infused RVO tendencies to locate *agency* with the RVO rather than retirement village residents.

In terms of Cheney's (1999, 2004, 2006) levels of adoption of discourse, RVOs' promotional rhetoric persuades readers to think about residents as active and leisured lifestyleers rather than as village participants. Thus in some ways, customer focus is a new term for practices that remain largely intact: that is, residents reside and managers manage. However, in practice RVOs encountered residents who enacted alternative interpretations, roles, and forms of what it means to be participating *customers*. It was not simply that RVOs adopted new practices in organisation-specific ways that resulted in greater residents' participation. Residents played a part in bringing about a new dimension to the market model principle of customer focus. In so doing, the residents' action demonstrated motivational forces of identification and adaptation (transformation).

CHAPTER 10

CONCLUSION

This thesis used an organisational communication standpoint to show that residents' participate in RVOs as both *community* and *organisation* members, and not simply as consumers of lifestyle. In so doing, the study revealed new understandings of retirement village residents and their relationships with RVOs. The purpose of this chapter is to draw conclusions from the research which has involved RVO representations of retirement village living and participants' experiences of RVO, with reference to broader societal contexts and organisational participation. I raise implications of the study for residents' quality of life and organisational systems and processes as well as for future research and practice. I also explore the research process itself to highlight benefits and drawbacks of aspects of the research process.

The chapter is structured in three sections. In the *first* section I reflect on the major findings of my study as they contribute to knowledge about retirement villages, organisational communication, and residents of retirement villages. The *second* section considers the benefits, challenges, and limitations of my methodological framework. The *third* section reflects on implications of the study for future research and practice.

Contributions of the Study

The research identified several tensions in residents' and employees' talk and text as well as formal RVO promotion and management communication practices. These were tensions between (a) the representations of choice and how residents' interpreted and exercised choice; (b) residents' and RVO agency; (c) discourses of active ageing, ageing-as-decline, and ideal retirement; and (d) individual preferences and constraints imposed by societal and organisational structures. These tensions infused the findings that are summarised below.

RVOs' specific *language-use* controlled meanings about residents' participation. Corporate promotional material constructed residents' participation as primarily leisure and activity by co-opting discourses of active and positive ageing and retirement-as-leisure. In addition, RVOs constructed their own roles as significant in enabling residents to participate in this lifestyle by providing the necessary facilities and environment. In terms of Cheney's (2006) levels of adoption of discourse, RVOs' promotional rhetoric positioned residents as indulging in leisure and resort lifestyles rather than as participating in their village as community. From a critical perspective this situation is not dissimilar to 19th and 20th century old age homes where medicalisation of ageing and the institutionalisation of retirement that excluded older people socially and economically from society (Koopman-Boyden, 1988; Saville-Smith, 1993; Walker, 2006). Yet, in RVOs resident participation is not limited to leisure and resort-style living, nor does it appear as shallow or tokenistic, as some critical perspectives might have us believe. Rather, in this study residents demonstrated a variety of participatory activities with different degrees of control, with a range of issues, and levels of authority in the RVOs – as well as constraints.

The use of Bernstein's (1976) model of organisational participation helped to revealed dimensions of resident participation. Residents had the *greatest degree of control* over issues arising at the community level of the RVO: that is, the residents' domain. At the village-management and corporate levels of the RVO, on the other hand, residents' participation was subject to staff discretion and corporate invitation. In some respects this was due to the nature and general acceptance of roles of formal organisations. Organisational structures and processes established for the purpose of communication between residents and employees were widely accepted by employees and residents as a natural arrangement (see McPhee, 1985). However, when residents or employees perceived the other to be not performing within, or stepping outside of *accepted*

organisational roles, tensions became apparent. For example, when residents expressed concern over management issues or when employees failed to treat residents as co-owners. Some tensions were resolved to the satisfaction of both parties (e.g., the sign-writing on the van), and others less so (e.g., outside groups using village amenities for RVO marketing purposes). Such conflicting interpretations and the varied nature of outcomes suggest that roles and relationships between RVO and residents are somewhat negotiated and evolving.

Further still, residents' participation was enhanced or limited depending on how residents' *framed* the RVO's position as well as their own. Framing the RVO as the decision-maker or as customer-focused for instance, had implications for residents' participatory activities and their levels of participation. Residents' relinquished power when they (a) framed RVO activities as business and yet simultaneously claimed power when they (b) framed their expectations of RVO activities within the domain of customer-focus.

Market-friendly discourses related to customer-focus and profit-making (see Cheney, 1999; Christensen, 1995; du Gay, 1996) infused residents expectations of RVO behaviour. Ironically, when they framed RVO activities as "business", residents accepted less-than-resident-focused actions from RVOs. At the same time, residents in this study took seriously RVO commitments to customer focus and expected the organisation to listen to them. Here, discourses associated with ownership and customer focus underpinned explanations of their expectations of RVOs. Yet somehow, "it's a business" justified actions that favoured the RVO over residents. Residents also expressed doubts about the RVOs' abilities to focus on residents' needs while they also focused on making money. This suggests that residents understood the idea/ideal of customer focus to have limits in practice. This would also suggest that economic discourses and material factors (i.e., capacity to make money)

were accepted by residents as constraints on RVO discourse and practices of customer focus.

Concepts of ownership seemed to privilege one group over the other – depending on who was framing whom as owner. As mentioned above both residents and RVO employees expressed a sense of ownership of the village. Even though this brought them into conflict with each other, residents' challenges to RVOs' established domains and processes of decision-making revealed how resident participation in corporate or village-management zones can result in positive outcomes for all concerned. These outcomes were not achieved simply in talk and discourse (see Cloud 1994; Cheney & Cloud, 2006). When the residents boycotted the village van they demonstrated the material effects of residents' *agency*. By withdrawing their support for the vehicle, the residents stopped engaging in everyday, passive marketing of the RVO.

Even though both groups saw themselves as owners, it was apparent that they owned different parts of the organisation (see Deetz, 1992). The RVO owned the property and the business, yet residents owned their contribution to the production of the village-as-product. That is, in addition to their financial contribution by way of the capital sum and weekly fees, residents' active participation made the village a viable product. Their engagement with RVO activities associated with promotion, relationship marketing, consultation and feedback channels, and village community all contributed to the ongoing development and maintenance of the retirement village product. In the light of this, residents could rightly expect the RVO to respond to the implied ownership, or at least producer, rights. This perspective highlights the interdependent quality of relationships between the RVO and residents, and between employees (as RVO representatives) and residents.

The *level of power* claimed by residents and accorded to RVOs is also inherent in the naming and framing. However, organisations have far greater financial, material, and symbolic resources than unorganised

publics (Cheney with Lair, 2005) to represent retirement village living (see Hugman, 2001). In the case of RVOs, the organisation has far more power than its residents. Thus, another tension concerned the material resources available to RVOs and the symbolic dimensions of organisational structures, communication processes, and employee roles (see Cooren, 1999, 2004; Cooren & Fairhurst, in press).

It is relatively easy to say that the public representations of retirement village living, residents, older people, and ageing have implications for how society sees older people generally, or retirement village residents specifically. However, it is in the day-to-day practices of retirement village living that RVOs encourage and constrain participation. Employees, have very real effects on residents' capacity to participate and this was demonstrated by employee actions in "Coffee with Annie" and Sharon's rules. Yet, RVOs depend on residents to contribute to the production and marketing of the village. It is in the RVOs interests to encourage employees to facilitate resident participation in ways that are open-ended (Stohl, 1993) and enable the expression of new ideas from unexpected quarters of the organisation (Kanter, 1982). Residents should be valued for their *potential* contributions the RVO, and processes of participation should remain open and negotiable.

Identity claims at the RVO-resident interface was another key issue. RVOs promoted themselves as well as their products, and subtly induced residents to identify with the RVO, as well as lifestyle choice. At the meso/organisational level RVOs "sold" themselves and their economic success as much as their product. By associating with RVO success, residents could also identify as "successful" in that they have the financial wealth necessary to buy into a village. However, it is likely that the target audiences for this type of self-promotional message were primarily competitors and opinion leaders (see du Gay, 1996) in the same "competitive field" (Karpik, 1978) or "clique" (White, 1981), rather than residents. Even so, at the societal/macro level, RVOs also used subtle

combinations of positive ageing and ageing-as-decline discourses as well as messages about what it is to age or retire successfully, in order to induce identification on the part of potential (and existing) residents. RVO rhetoric simultaneously allayed latent concerns that potential residents may have about “institutional” living and appealed to both values of individual self-determination and aspirations for active ageing. These messages helped to influence the boundaries, nature, and expectations of residents’ participation in RVOs.

The materiality and communicative features of design, form, and architecture (Vale, 1995), of retirement villages in conjunction with discourses of ageing-as-decline (see, Blaikie, 1999; Featherstone & Wernick, 1995; Gullette, 1997; Koopman-Boyden, 1993a; Nelson, 2002; Palmore, 2000; Phillipson, 1998) contributed to somewhat contradictory identity constructions by both insiders and outsiders. Residents and non-residents differed on what kind of people *actually* lived in retirement villages and their perceptions of who *should* live there. The residents identified with the image of “active-55 plus” retirement villages, while non-residents did not identify with the images being presented by RVOs; instead claiming that retirement villages were for wealthy “old” people. Yet, stereotypes of older age and ageing-as-decline discourses were used by both groups to justify their (superior) identity claims: They framed their positions as being different from “old” people.

The extent to which older individuals had experienced situations that they framed as problems (see Smith, 1988; Weick, 1995) influenced their descriptions of retirement villages. Outsiders with largely superficial and external experience of retirement villages tended to label them as “artificial” and not real communities. Moreover, they tended to interpret the design features (see Vale, 1995) of the retirement villages as having a far greater influence on residents’ behaviour than the residents’ experienced. The senior manager’s (as a new insider) description of the mismatch between residents’ dress sense and the village environment is

one example of this. Residents' on the other hand focused more on relationships with each other and their lived lives than the village design.

Participants' understandings of community also revealed that materiality of circumstances *impacts on the choices* of older people. The study showed that there is more to residents' choices than the usual push or pull factors associated with retirement villages (Stimson, 2002; Stimson & McCrea, 2004). Structural changes in society contribute to materiality of choices and the changing lived realities of neighbourhoods and different forms of property development impact on actual choices of older people. No matter how RVO rhetoric frames retirement village living as choice, there are material realities that influence and even limit real choices of older people. For some, retirement villages become the only option when desirable housing is no longer available in preferred locations. Thus, choice is more nominal than actual and in this respect, marketisation may be seen as limiting choices for older people in parts of wider society, while appearing to create more choices within specific domains such as retirement village (also see Laws, 1995 for example).

Choice is also material in terms of *access* to retirement villages. RVOs may promote their products as up-market and price to sell to them in the middle market but there are *real limitations* on who can live in retirement villages. As in other domains of Western society, the availability of economic and cultural resources affects societal and organisational participation (Cheney 2004; Cloud, 1994; Cheney & Cloud 2006). Material wealth and wellbeing in older age affect access to retirement village living (Laws, 1995, 1996; McHugh, 2000) as much as images of ideal retirement and active ageing (Laws, 1993, 1995; McHugh, 2000), and structurally exclude many older people because of their lack of economic and cultural resources.

Residents are co-producers of the village product and have greater motivation to participate in RVO affairs than is generally acknowledged. As co-producers residents are operative organisational members (Simon,

1976) who accept the organisation's goals as their own (Galbraith, 1978) and in this respect identify with the organisation (Burke, 1950/69). Outsiders of retirement villages believed that residents obeyed RVO rules at the expense of their own choices, and some insiders (managers and other employees) failed to acknowledge residents' agency or participatory rights within the RVO. However, instances of resident willingness to challenge both traditional expectations of residents and RVO decisions and processes suggest that residents have greater motivation to be involved than is generally envisaged. One factor contributing to resident motivation to participate in RVOs is that residents buy a product that they are *unlikely* to trade in for something else; generally residents expect to live in village for life. Thus, the nature of community membership (Mattessich & Monsey, 1997; Plant, 1974; Warren, 1978; Wharf-Higgins, 1999; Wilkinson, 1991) would suggest that residents' levels of emotional investment are high and likely to be matched with motivation to participate in both community and the organisation.

In contrast, employees are less likely to have such long term relationships with either the RVO or the residents. Even if employed for years, employees live away from the RVO. It is possible that residents could live in a retirement village for over 20 years; a rare period of employment in one organisation for most employees these days. In this situation residents are more likely to see staff members come and go, and this will add to their sense of ownership. Also, new employees are likely to bring outsider views on ageing, retirement, and retirement villages to their job which may involve residents "educating" new staff and re-negotiating resident and employee roles and relationships.

The findings of this study support and extend the work of other research on retirement villages. This study shows that retirement village living is promoted by RVOs and experienced by residents as associated with leisure, independence, and choice, and in this respect is consistent with much of the existing research (e.g., Blaikie, 1999; Grant, 2006;

Kastenbaum, 1995; Laws, 1993, 1995, 1996; Mansvelt, 2003, 2005b; McHugh, 2003). The critical contribution to retirement village research of this study is in its focus on the RVO as *organisation* and the resident as *member* of that organisation rather than simply as resident of the village or passive recipient of retirement village services. In summary, the most significant overall issues to emerge from the study are (a) the agency of residents as organisational members; (b) extending current understanding of retirement village residents as customers; and (c) the function of RVO-resident interactions as enacting an organisation's customer focus.

Reflections on Research Theory and Process

This section discusses the particular aspects of the methodology used in this research. It examines the benefits of rhetorical criticism (RC) and using critical discourse analysis (CDA) methodology as well as benefits and challenges of using multiple data collection methods.

RC and CDA Methodology

The study aimed to explore the meanings of resident participation, in participants' talk and practices to reveal how social trends such as the medicalisation of ageing, leisure and retirement, and marketisation have penetrated the internal workings of RVOs and. RC and CDA offered complementary and productive approaches for analysis of intentional organisational messages in the public domain, as well as the talk of organisational employees and residents.

While the traditional view of rhetoric – and therefore of rhetorical criticism – emphasises purposive uses of persuasive language a contemporary view opens up rhetorical analysis to all instances of suasive potential or actuality in language and other symbol usage (e.g., Cheney, 2004; Cheney, Christiansen, Conrad, et al., 2004; Livesey, 2002). From a contemporary standpoint, rhetorical analysis is less tied to intention, to discrete messages, and to clearly defined audiences. Thus, broad socialisation practices and organisational culture are as open to rhetorical

examination as are marketing and public relations campaigns. Along with other recent studies (Henderson, 2005; Henderson, Weaver, & Cheney, 2007; Heracleous, 2006; Heracleous & Barrett, 2001; Livesey, 2002) the research shows how CDA and RC are converging in terms of the scope of their artefacts/texts, their resources for analysis, and their cultural/institutional concerns.

Critical discourse analysis in this study brings into focus relationships between discursive, social, and institutional practices within RVOs (Fairclough 1992, 1993; van Dijk, 2001b; 2004). In this study, competing and complementary discourses infused formal organisational messages as well as residents' and employees' talk about organisational communication structures and processes. RVOs interwove discourses of ageing-as-decline, positive ageing, and leisure lifestyle to construct residents as (successful) holiday-makers and themselves as partners in the project. On the other hand, while RVOs used discourses of the market and expressed commitment to customers, their power and control of residents' (non-) participation through apparently neutral organisational structures and processes (see Cooren, 2004; Deetz, 1992; Hardy & Clegg, 1999; McPhee, 1985; McPhee & Zaugg, 2000) went largely unnoticed. The structures and processes of managed participation shaped residents' day-to-day communicative activities and so influenced the very processes of participation.

These discourses and practices reflect a partial colonisation of traditional medicalised residential aged-care by a marketised model of service. This is *partial* colonisation because residents' participation exhibited features of both models. The traditional medicalised model (Blaikie, 1999; Estes, et al., 2001; Koopman-Boyden, 1988), where residents were passive patients and inmates (Phillipson, 1998; Saville-Smith, 1993; Tennant, 1989), was evidenced in the widely held assumption that managing residents' participation was a normal function of RVOs. The marketisation of residents' participation was evidenced most clearly in

residents' engagement with RVO customer focused rhetoric and participatory claims in non-traditional domains.

Reflections on Multiple Methods

Undertaking document analysis, interviewing employees, and holding focus group conversations with residents and non-residents provided a richness of information that could not be achieved from using one source or method alone. Using examples of RVO advertisements and brochures in focus groups helped to elicit responses from participants that would have been difficult to obtain without them. This added to the value of the data from the document analysis. The critical incident of the "kindy cab" also demonstrates this point. The combination of residents' comments and the sales/manager's narrative helped me to access richer data as well as undertake a far more comprehensive analysis than would have been otherwise possible.

At a practical level, there was a degree of serendipity about organising the residents' focus groups that also benefited the research process. I complied with one village manager's request to put up an invitation on the village notice board. The notice had spaces for residents to list their names. The method was so successful that I used it for all other villages except one. Even though this very public method raised issues related to participant confidentiality, there were benefits in terms of residents' participation in the research, as well as the research itself.

One reason for selecting the focus group data-gathering method was that as a naturalistic method it enables the researcher to access the participants' talk and interactions (Krueger, 1994; Morgan, 1997, 1998) and therefore constitutes to a group's shared reality (Wilkinson, 2004). Residents' choice to participate in the focus group was in part influenced by their experience of retirement village living "people's lives - their projects, their developing identities, their evaluations" (Puchta & Potter, 2004, p. 2). The notice-board method allowed residents to self-select on

criteria available to them: residents' knowledge of and experiences with each other in the village. Some residents choose to attend the focus group in order that "balanced views were heard". Equally, of course, this public method may have resulted on other residents not taking part. Even so, the method enabled these residents' to exercise some power over the focus group process itself.

It has been argued that the value of the focus group method lies in its capacity to allow the researcher to "*experience the experiencing*" of participants (Puchta & Potter, 2004, p. 8, original emphasis). It is through participants sharing and comparing their views, observations, and everyday experiences, and developing themes that focus groups increase the meaningfulness of findings (Krueger, 1994; Morgan, 1997; Patton, 2002; Wilkinson, 2004). For these reasons, focus groups with residents and non-resident older people were particularly valuable. Facilitating interaction among participants enabled me remain open to emergent themes and access to multiple layers of meanings around experiences of retirement villages, ideas on community, and opinions on RVO communication activities. The concern with "RVO rules" and control, for example, emerged through participants' interaction in the non-residents' focus groups. Similarly with residents' views on RVO communication about the "kindy cab", the issue arose in the focus group interaction. The intensity of feeling and significance of issues became apparent in ongoing references to them and interactions among the participants.

Finally, with regard to the focus group method, the emphasis on interaction facilitated a shift in power from me as the researcher to the participants. This is consistent with arguments from others (e.g., Krueger, 1994, 1998a; Morgan, 1997; Wilkinson, 2004). In residents' focus groups, some residents adopted facilitating roles for parts of the conversation by inviting contributions from others, making connections between different stories, and asking open-ended questions sometimes directly related to the research agenda and other times indirectly. Allowing residents' explore

topics as they wanted enabled new directions to emerge. For instance, residents' stories about choosing a retirement village began as part of the introductions at the beginning of the focus group. In the first few focus groups, residents told their stories without prompting from me, and as a result, in later groups I asked the question largely to facilitate sharing and to get a sense of the people there. The real value of these contributions became apparent in the analysis and comparison of both residents' and non-residents' focus group transcripts. It was in this process that themes concerning community, and later participation, began to emerge. Thus, the focus group method, with its emphasis on interaction and participant power, enabled me to remain open to the resident-oriented experience and emerging issues and themes.

This experience with focus groups would lead me to consider their use with employees. While interviews were very successful with employees in this study, the benefits offered by the interactive dimension of focus groups suggest they could enhance the data gathering process.

The multiple forms of data employed and the sheer volume of it meant that most of my characterisations of rhetoric and discourse were broad-ranging in scope. However, using a combination of critical incidents (Patton, 2002) to single out events and textual passages from documents, residents' stories, and focus group conversations for close analysis enabled me to integrate themes and make connections across the multiple data.

Implications for Future Research and Practice

In order to reveal how retirement village residents' participation and choice has been affected by medicalisation of ageing, the ideas of retirement, and marketisation, the research focused on specific practices, domains, and issues of day-to-day resident participation in RVOs. In this respect I adapted Bernstein's (1976) model of workplace participation which identifies three dimensions of decision-making and Cheney's (1999, 2004, 2006) model which suggests there are three levels of adoption of

discourse. In the process five issues emerged which have implication for future research and practice.

In terms of Bernstein's (1976) three levels of involvement in decision-making, residents appear to be limited to their own community. If RVOs are to be customer-focused towards residents they need to assess the impact of their implicit use of the ageing-as-decline discourses and implications for their relationships with residents.

In terms of Cheney's (1999, 2004, 2006) levels of adoption of discourse, RVOs' promotional rhetoric persuades readers to think about residents as active and leisured lifestylers rather than as village participants. Thus in some ways, customer focus' is a new term for existing practices that remain largely intact: that is, residents reside and managers manage. However, in practice RVOs encountered residents who enacted alternative interpretations, roles, and forms, of what it means to be participating customers.

Critically, RVO communication with residents not only deals with immediate everyday activities and issues of retirement village living, but also promotes a marketised form of retirement village. In part, this depends on two things: (a) Residents accepting that RVOs are ultimately in charge and (b) RVOs accepting that residents are organisational insiders' as well as customers. This last point has implications for residents' experiences of retirement villages and RVOs management practices, as well as future research. The study leaves us with five interrelated issues with research and practice implications for the retirement village sector in New Zealand. Each of these dimensions of resident participation in RVOs is open to further investigation.

The most important feature of retirement villages is the interdependence of residents' and RVOs in the co-construction of the village product. Retirement villages could not exist without the active participation of residents in village and organisational life. Residents' growing cognisance of their role along with an accompanying sense of

agency has huge implications for RVOs. The extent to which residents choose to engage with or withdraw from involvement with passive or active marketing of retirement village living influences an RVO's profile within the wider network of older people and their associates – that is, potential future residents.

Another issue concerns residents' interpretation of RVO rhetoric and their subsequent expectations for RVO communicative behaviour and managed resident participation. Promotional messages imbued with customer-oriented values of choice and freedom, and discourses of individual responsibility and entrepreneurship are open to scrutiny by both current and potential residents. Market-savvy residents are not "unwitting dupes who unreflectively reproduce the status quo" (Mumby, 1997, p. 366). They question authority and de-construct organisational rhetoric – "we're the 55-plus and it's our retirement living" (Resident, Focus Group). RVOs need to facilitate a shift in power that takes into account of residents' approaches to organisational messages and their expectations of RVO actions.

A third issue for both residents and RVOs is the differences between formal and claimed senses of ownership and the attendant implications for resident's and RVO expectations of resident participation. Both groups make similar as well as different contributions to the success of the retirement village and the RVO. At a very basic level, the RVOs own the material aspects of their retirement villages, such as the facilities and the business. Yet residents interpret their paying for the right to live at the village as giving them ownership rights about what happens in the village and in their relationships with RVOs. Concepts of ownership become more complex when the RVOs represent residents in ways they do not like, or expect residents to engage in passive marketing of the villages. Residents' participation helps to create the very village they have a stake in, and therefore their claims to ownership should be seen as at least equivalent to other stakeholders.

A fourth outcome concerns the long-term and intimate relationship between RVOs and residents, which has implications for ongoing more-than-customer focused communication. As one RVO manager pointed out, unlike common understandings of customers, residents live with the RVO. Moreover, community involvement is more than being involved in residents social activities; resident participation is also *organisational* involvement. The roles and actions of employees are critical here: as demonstrated in the research, the extent to which they are open to resident participation and able to develop communication processes influences the nature of resident participation. In this respect, post-purchase internal communication messages, and organisational structures and processes are as, if not more, important than pre-purchase, external RVO communication.

Finally, the willingness of residents to participate may be driven by motivation for transformation: That is, to make a real difference in village life and the RVO as an organisation. The sense of ownership expressed by residents, their willingness to be involved in RVO consultation programmes, as well as to challenge RVO decisions, suggests that retirement villages are more than lifestyle enclaves. Residents of retirement villages are both community and organisational members.

In conclusion, in some respects marketisation has enhanced the position of residents, particularly when they take seriously the RVOs' emphasis on customer focused and claim customer-ownership rights themselves. In other respects, however, taken-for-granted norms associated with organisational life help naturalise RVO authority and resident acquiescence. Residents' have far greater power as *co-producers* of the village product than that accorded them by this naturalised state. This research demonstrates that residents' agency, and the non-traditional domains in which residents choose to participate, should be of central concern to both residents and RVOs.

Organisational structures and processes, employee enactment of stated organisational values, and the nature of long-term-residence and (relatively) short-term employment problematise current understandings of RVO-resident relationships. With increasing longevity of people 55-plus, RVOs must face the possibility that residents will live in retirement villages for over 20, or even over 30, years. The emergence of long-term customer relationships poses complex opportunities and challenges for RVOs, their paying, and paid organisational members, as well as aspiring retirement village residents and employees.

APPENDIX 1

Ethics Approval

COPY OF ETHICS APPROVAL MEMO

Research Office
 Waikato Management School
 The University of Waikato
 Private Bag 3105
 Hamilton
 New Zealand

Amanda Sircombe
 Research Manager
 Phone +64 7 838 4376
 Fax +64 7 838 4063
 Email amandas@waikato.ac.nz
 www.management.ac.nz



THE UNIVERSITY OF
WAIKATO
Te Whare Wānanga o Waikato

MANAGEMENT SCHOOL
Te Raupapa

MEMO

To	Mary Simpson, Department of Management Communication
From:	Amanda Sircombe, Research Manager
Date	19 th April 2004
Subject:	Waikato Management School Ethical Application

Dear Mary,

Please find enclosed a copy of your approved Application for Ethical Approval of Research for the project entitled:

“Organisational communication in the New Zealand retirement village sector: an individual and organisational analysis”

Regards

Amanda Sircombe
 Research Manager

**WAIKATO MANAGEMENT SCHOOL
APPLICATION FOR ETHICAL APPROVAL**

Outline of the Research Project

(for the benefit of the Waikato Management School Ethics Committee)

1. Title of Project: An organisational and individual analysis of organization communication within the New Zealand aged-service sector

2. Researcher(s) name and contact information: Mary

Mary Simpson	Email: mary@waikato.ac.nz .
Department of Management Communication	Ph: 07 838 4466 ext 8357.
Waikato Management School	Fax: 07 8384358
University of Waikato	Mobile: 027 2946586
PB 3105, HAMILTON.	

3. Supervisor's name and contact information:

Professor George Cheney	Professor
Adjunct Professor	
Department of Management Communication	Department of Communication
University of Waikato	The University of Utah
	255 S. Central Campus Drive,
	Room 2400
	Salt Lake City, UT 84112
	E-mail: george.cheney@utah.edu
	Phone: 1-801-581-6888
	Fax: 1-801-585-6255

AND

4. Brief Outline of the Project (what is it about and what is being investigated):

The purpose of the research is to analyse the communication strategies of aged-sector-organisations and the response(s) of current and potential clients. The research will focus particularly on communication concerned with retirement including: organisations' assessment of activities and trends in New Zealand society (e.g. positive ageing) and developments within the aged-services sector; organisations' communication strategies; and responses of older people to the same.

5. Methodology:

The researcher will conduct a series of semi-structured individual interviews, and focus groups with three groups of participants:

- Older people who are resident in independent living accommodation operated by two organisations: Presbyterian Support (Northern) and Harbour Group Holdings. (Current clients)
- Older people living independently outside of these situations. (Potential clients)
- Staff of Presbyterian Support (Northern) and Harbour Group Holdings, specifically management employees (involved in research, marketing, communication)

Focus groups will include: focus groups comprising industry sector employees only; focus groups comprising older people only; and cross-sectional focus groups involving both industry sector employees and older people.

The researcher will analyse a range of different communication documents used by the organisations Presbyterian Support (Northern) and Harbour Group Holdings to participate

in the debate about the introduction of genetically modified crops and foods to New Zealand.

6. Expected Outcomes of the Research:

The research will contribute to an understanding of the role of communication in the development of the aged-services sector market, and especially retirement living options for older people. The research will explicate the role of internal and external communication processes in organisations' assessment of the market and development of strategic plans, and developing relationships of service with clients and potential client groups.

7. How will the participants be selected and how many will be involved?

Up to 16 interviews will be conducted. Of these 6-8 will be with management staff (some from each organization), and 8 will be with older people (balanced between those who are clients of the organizations, and those who are not).

A total of 10 focus groups will be conducted with 4-9 participants in each group: four focus groups comprising industry sector employees only; four focus groups comprising older people only; and two cross-sectional focus groups involving both industry sector employees and older people. Aged-services sector groups will reflect the specialist knowledge of a particular functional group within each organization (e.g., care staff; managers of residential facilities; marketing and communication staff; senior management).

8. How will the participants be contacted?

Participants who are staff and clients will be contacted through the organizations concerned. Other participants will be contacted through the researcher's existing networks.

9. Explain incentives and/or compulsion for participants to be involved in this study.

Participation is voluntary, and no incentives are offered. Refreshments will be provided for participants attending focus groups, particularly those held outside normal work hours (for employees), or near morning or afternoon tea times (for older people).

10. How will your processes allow participants to:

- a) **refuse to answer any particular question, and withdraw from the study at any time** – participants may contact the researcher at any time
- b) **ask any further questions about the study, which occur during participation** – participants may contact the researcher at any time
- c) **be given access to a summary of the findings from the study when it is concluded** – participants may contact the researcher at any time up to the conclusion of the research.

11. Explain how any publications and/or reports will have the consent of participants, and how the anonymity of participants will be protected.

The real names of participants/industry organisations will not be used in research reports or publications unless explicit consent has been given.

12. What will happen to the information collected from participants?

All research material will be held by, and confidential to, the researcher and her supervisors. All notes and transcripts will be destroyed and all tapes will be erased once the project is completed. A research report will be made to participating organisations. The outcomes of the research may be published in both academic and industry publications.

Information Sheet for Participants

1. Title of Project:

Organisational communication within the New Zealand retirement-villages sector: An organisational and individual analysis

2. Researcher(s) name and contact information:

Mary Simpson	Email: mary@waikato.ac.nz .
Department of Management	Ph: 07 838 4466 ext 8357.
Communication	Fax: 07 8384358
Waikato Management School	Mobile: 027 2946586
University of Waikato	
PB 3105, HAMILTON.	

3. Supervisor's name and contact information:

Prof George Cheney, Adjunct	Ass Prof C. Kay
Professor	Weaver
Dept of Management Communication	Department of
University of Waikato	Management
E-mail: george.cheney@.utah.edu	Communication
Dept of Communication	University of Waikato
The University of Utah, Salt Lake City	Ph 07 838-4466 ext 6222

4. Outline of the Research Project

The purpose of the research is to analyse the communication strategies of retirement village organisations and the response(s) of current and potential residents. The focus is on retirement village organisation communication activities, and on how residents and potential residents respond to communication about retirement village living. "Communication activities" covers a whole range of everyday things that happen in retirement village organisations – from dealing with enquiries about the villages, to developing the webpage and brochures, to conducting market research.

Research benefits: We know so little about retirement village living and perceptions of retirement villages, and yet in New Zealand, there are now around 23000 people living in retirement villages. In the last 15 years the growth has

been extensive, and more villages are being built now. So, investigating organisational communication practices, along with experiences with and perceptions of retirement villages may reveal opportunities for retirement villages and (potential) residents to develop together, new approaches to aging and retirement. So the outcomes of the research project will be useful for people moving into retirement villages, and organisations building them

Research participants: There are three groups of participants: those working for village organisations; residents of retirement villages; and potential residents who live in same locality as retirement villages. To contact potential retirement village residents who may participate in the study, I will offer to give short presentations at local clubs, and invite attendees to participate in a focus group to be arranged at a time and place convenient to those who volunteer. I may also advertise in community newspapers or community group newsletters.

5. Company or Organisation sponsoring or funding the research:

There is no sponsor or funding organisation for this research.

6. Confidentiality: Anything you talk about in the focus group is confidential to the group, and no identifying information will be used in any subsequent reports or publications. Your real name will not be used in research reports or publications unless you give explicit consent.

7. You may

- d) refuse to answer any particular question
- e) withdraw from the study at any time
- f) ask any further questions about the study
- g) contact me any time during the research
- h) have access to a summary of the findings when the study is concluded

8. What will happen to the information collected from participants?

All research material will be held by, and confidential to, the researcher and her supervisors. All notes and transcripts will be destroyed and all tapes will be erased once the project is completed. You are entitled to receive a summary of findings at the end of the project, and I will also offer to give a presentation at your village. A research report will also be made to retirement village organisations which participated. The outcomes of the research may be published in both academic and industry publications.

THE UNIVERSITY OF WAIKATO
Waikato Management School

Research Title: Organisational communication within the New Zealand retirement-villages sector: An organisational and individual analysis

Consent Form for Retirement Village Participants

I have read the **letter** from Mary Simpson and the **Information Sheet** form for this study and have had the details of the study explained to me. My questions about the study have been answered to my satisfaction, and I understand that I may ask further questions at any time.

I also understand that I am free to withdraw from the study at any time, or to decline to answer any particular questions in the study. I agree to provide information to the researchers under the conditions of confidentiality set out in the **letter** from Mary Simpson and **Information Sheet**.

I agree to participate in this study under the conditions set out in the **letter** from Mary Simpson and **Information Sheet**.

Signed: _____

Name: _____

Date: _____

I agree that while participating in the study my responses and comments may be audiotape recorded for the purposes of the research analysis.

Signed: _____

Name: _____

Date: _____

Researcher's Name and contact information:

Mary Simpson	Email: mary@waikato.ac.nz .
Department of Management Communication	Ph: 07 838 4466 ext 8357.
Waikato Management School	Fax: 07 8384358
University of Waikato	Mobile: 027 2946586
PB 3105, HAMILTON.	

Supervisors' Names and contact information:

Prof George Cheney, Adjunct Professor	Ass Prof C. Kay Weaver
Dept of Management Communication	Department of Management
University of Waikato	Communication
	University of Waikato
E-mail: george.cheney@.utah.edu	Ph 07 838-4466 ext 6222
Dept of Communication	
The University of Utah, Salt Lake City	

APPENDIX 2

Interview Schedule

Prior to interview:

- Go over Information Sheet /letter
- Consent to interview, and tape record interview is obtained
- “You are free to participate as you think fit, including choosing not answer particular questions, or withdrawing from the interview at anytime.”
- I will use your comments so that you will not be able to be identified

Participants: Organisations offering accommodation services to older people

Organizational representatives e.g. Management – marketing and communication and service managers.

Introduction:

Thank you for agreeing to this interview...

During the last 20 years there have been many changes for older people in NZ society.

For example: later entitlement to NZ superannuation; more retirement villages to choose from; promotion of positive ageing; diverse range of organisations offering retirement living, and so on. In addition people are generally living longer than their parents, and often experiencing healthier old age.

My research is about recent developments in retirement village living options for older people – that is the increase kinds and range of retirement living options.

My research focuses on communication between retirement village organisations and older people – that is on this organisation 's communication activities, and on how residents and potential residents respond to communication about retirement village living.

“Communication activities” covers a whole range of everyday things that happen in this organisation – from dealing with enquiries about the villages, to developing the webpage and brochures, to conducting market research.

In this interview I will ask you questions related to these issues.

So to begin: Tell me a bit about your job here at this organisation

- o What parts of your job do you consider relate to communication with residents and/or potential residents? (directly or indirectly)

Interview Schedule:

Key Area	RQ	Interview Question	Priority
1.	1.1 and 1.2	In recent years there have been a number of changes in retirement village options. What do you think has contributed, or is contributing, to these changes?	
		<p>Prompts/probes/follow up questions:</p> <p>e.g., societal trends, govt policies, etc</p> <p>What do you think has enabled business organisations such as this organisation (among others) to move into what used to be the domain of religious and welfare organisations?</p> <p>How do you think older people themselves may have contributed to these developments? (e.g. involvement in lobby groups such as Grey Power, Age Concern; in a position to choose more (financially/socially), expectations etc)</p>	
2.		What do you think is this organisation’s view of ageing and older people?	
	2.3	<p>Prompts/probes/follow up questions:</p> <ul style="list-style-type: none"> • How is that communicated to current and prospective clients? (in services it offers, communication strategies) • In the past hospital boards had ‘old people’s wards’, church trusts ran resthomes, and there were some private individuals who ran (often) small resthomes. How do you think these organisations viewed and portrayed ageing and older people? • What did these organizations do (or not do) that makes you think this? • How do you think private organizations such as Metlife Care, Harbour Group Holdings, view and portray ageing and older people? • What do these organizations do that made you think this? • How do you think the current situation with more private organisations offering retirement living, similar to and/or different from the past? 	
		<i>Transition statement to link where the respondent does not mention any differences.</i>	
3.	1.5	How did this organisation decide to offer and develop the villages	

Key Area	RQ	Interview Question	Priority
		<p>and services it has?</p> <ul style="list-style-type: none"> What does this organisation do to determine whether those services should remain the same, change, be deleted, developed or increased in some way? 	
4.	2.1	<p>What general information does this organisation collect to use in its policy decisions/ service development?</p> <ul style="list-style-type: none"> E.g., environmental scanning, research competitors activities, trends in population, needs/wants of older people, and views on aging How does this organisation decide how useful or relevant the information is? 	
5.		<p>What role specific role do marketing, advertising and PR activities play in this organisation?</p>	
	1.3	<p>Prompts/probes/follow up questions:</p> <p>What kinds of these (MAPR) activities does this organisation undertake?</p> <p>What does this organisation seek to achieve with these activities</p>	
6.	2.2	<p>What factors/processes do you perceive as restraining, constraining or assisting this organisation decision making?</p> <ul style="list-style-type: none"> For instance ... 	
7.	1.4	<p>What do you think makes an organisation good at, successful or effective, in providing retirement village living for older people?</p>	
		<p>Prompts/probes/follow up questions:</p> <p>How do you think they get to be good at it? What do these organizations do to be good at it?</p> <p>How do you think older people benefit from organisations that work like this?</p> <p>What downsides if any, do you see for older people with this approach?</p> <p>What downsides if any, do you see for organizations like yours with this approach?</p>	
8.	3.1 and 3.2	<p>What personal factors do you think influences older people to move into a retirement village/resthome? (e.g., preferences, needs, finance, location, etc)</p>	
		<p>Prompts/probes/follow up questions:</p> <p>How do you know about them? (contacts, reading material etc)</p>	
9.	4.2	<p>Many of today's organisations promote note only their services, but also themselves in newspapers, TV, websites, brochures etc.</p>	
		<p>Prompts/probes/follow up questions:</p> <p>How do you think this organisation likes to present itself as in these forums?</p>	

Key Area	RQ	Interview Question	Priority
		<p>How do you account for this? Reasons?</p> <p>How would you describe this organisation in terms of its Culture? Values?</p> <p>In what ways does this organisation enable staff and clients to identify with the organization?</p>	
10.	4.4	What do you think makes organisations successful at telling people about and selling retirement village living?	
		<p>Prompts/probes/follow up questions:</p> <p>What organizations say in their promotional material?</p> <ul style="list-style-type: none"> o About their product/service? o About themselves? o About older people? o About ageing? <p>What others say? ...</p> <ul style="list-style-type: none"> o Friend, current residents, family? <p>What they do? ...</p> <ul style="list-style-type: none"> o How they treat enquiries? o How they treat older people? o How they treat family? o ? 	
11.	3.3	<p>Finally, let's talk about your view on ageing and older people in general.</p> <p>What do you think about ageing, getting older?</p>	
		<p>What similarities/differences do you notice ageing and older people of say 30 years ago, and now? E.g. your grandparents/parents</p> <p>How do think NZ society sees ageing and older people – then and now?</p> <p>Where would you place yourself in terms of this societal view on ageing and older people?</p> <p>What does 'retirement' and 'retirement living' mean to you?</p> <p>What do you think about retirement villages, resthomes, hospitals, serviced apartments and the like?</p>	

Well, that's it from me. Do you have any questions for me?

Here is my contact phone number & address (email inc) should you think of anything more you want to know about...

APPENDIX 3

Focus Group Documents

Sample Letter

Dear Resident,

I am writing to ask you to participate in my doctoral research project. The project is titled "Organisational communication within the New Zealand retirement-villages sector: An organisational and individual analysis". [name] CEO of [the RVO] has consented to my inviting you to participate.

Who am I?

My name is Mary Simpson, and I am a Lecturer with the Department of Management Communication at the University of Waikato. My research field is organisational communication, and I also teach managing conflict and consensus, and careers and consulting methods. Prior to moving to tertiary education three years ago, I worked for some time in residential and community "aged-care" in Thames, Hamilton, and Auckland. My doctoral research brings together my interest in organisation communication, and my experience with, and passion for, the development of new ways of living for retired people.

Why choose [this RVO]?

The main reasons for involving [this RVO] in my research are that the organisation

- Offers high-quality retirement living
- Focuses on relationships with its clients
- Uses a distinctive brand theme to identify its retirement facilities

What is the focus of study?

The focus is on the organisation's communication activities, and on how residents and potential residents respond to communication about retirement village living. "Communication activities" covers a whole range of everyday things that happen in the organisation – from dealing with enquiries about the villages, to developing the webpage and brochures, to conducting market research.

What do you need to do?

Shortly, I will arrange to give a short presentation about the research project at your village. Afterwards, I will invite those present to participate in a focus group which will take place at a time and place convenient to the people who volunteer. Participation is voluntary, so if you are one of those who agree to take part you will need to sign a participation consent form. Importantly, you are free to withdraw from the research project at any time, and free to decline answering any particular questions. You may ask questions of me any time during the project.

How long will the research project take?

How long the project takes depends on my ability to fit in with everyone's busy schedules. The aim is to finish information gathering with this organisation by the end of June 2004.

What about confidentiality?

Anything you talk about in the focus group is confidential to the group, and no identifying information will be used in any subsequent reports or publications. Your real name will not be used in research reports or publications unless you give explicit consent. The real name of [the RVO] will not be used without the explicit consent of [the RVO], and name of your village will not be used at all.

How are the research outcomes reported?

In July or August 2004 I will formally report back on preliminary findings to [name] CEO of [RVO]. You are entitled to receive a summary of findings at the end of the project, and I will also offer to give a presentation at your village. A research report will also be made to retirement village organisations which participated in the study. The outcomes of the research may be published in both academic and industry publications.

So what happens next?

If you have any questions feel free to contact me directly by phone or email. Otherwise, I'll be in touch with your village sometime between now and early June 2004.

Looking forward to meeting you -

Regards

Mary Simpson

Notice

[village name] Residents

You are invited to a group discussion:

"RESIDENTS' VIEWS ON COMMUNICATION ACTIVITIES OF [RVO NAME]"

[time], [date]

[venue]

with

Mary Simpson

from the Dept of Management Communication,
University of Waikato. She is doing a doctoral
study about communication activities of
retirement villages and how residents respond
to them.

*[NAME] CEO of [RVO] has consented to [village
name] taking part.*

SO, if you want to find out more about the
study and take part in this group discussion,
please put your name on the attached list.

THANKS!

Yes, I want to attend the discussion on [date]

Name	Contact ph and/or email
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

If this sheet is full, please put your name on the next one and another
session will be arranged

Focus Group Schedule:

Prior to FG:

- Go over Information Sheet /letter
- “You are free to participate as you think fit, including choosing not answer particular questions, or withdrawing from the interview at anytime.”
- I will use your comments so that you will not be able to be identified
- 1. The ways the group may address confidentiality, and that my suggestion is that “what’s said in the group stays in the group”
- 2. What the RV organisation gets to hear and in what format:...
- 3. What appears in the final reports and publications:....
- 4. What I will do, if you tell me things that are beyond the scope of the focus group, but clearly need addressing either with the retirement village or some other agency: consult with my supervisors, and with your permission inform the rightful parties (to be identified as needed)
- 5. . If we run out of time, I am more than happy to schedule another one if you want to continue
- 6. If you would like to talk to me in private after the FG you can do so, just see me after the session, or contact me later.
- Consent from for participation, and tape record interview is obtained

Participants: Residents of retirement villages

Thank you for agreeing to this participate in this discussion

During the last 20 years there have been many changes for people in NZ society.

For example: later entitlement to NZ superannuation; more retirement villages to choose from; promotion of positive ageing; diverse range of organisations offering retirement living, and so on. In addition people are generally living longer than their parents, and often experiencing healthier old age.

My research focuses on communication between retirement village organisations and people – that is on this organisation’s communication

activities, and on how residents and potential residents respond to communication about retirement village living.

“Communication activities” covers a whole range of everyday things that happen in this organisation – from dealing with enquiries about the villages, to developing the webpage and brochures, to conducting market research.

In this interview I will ask you questions related to these issues. This will be in include how you found out about this village before you moved here, and the communication activities you experience now that you live at this village

So to begin: Let’s introduce ourselves first.

Tell me your first name or the name you wish to be called by, and then one word that you associate with the phrase “retirement village”

Today, I want to start with broad communication themes and activities and move towards the more specific communication activities that this village/this organisation and residents use in communication with each other.

Interview Schedule:

Key Area	RQ	Interview Question	Priority
1.	1.4	What do you think makes an organisation good at, successful or effective, in providing retirement village living for people?	
		Prompts/probes/follow up questions: How do you think they get to be good at it? What do these organizations do to be good at it? How do you think people benefit from organisations that work like this? What downsides if any, do you see for people with this approach? What downsides if any, do you see for organizations like yours with this approach?	
2.		What role do you think marketing, advertising and PR activities play in promoting retirement village living?	
	1.3	Prompts/probes/follow up questions: For instance - What kinds marketing, advertising and PR activities did you remember from your investigation of retirement village living? e.g., advertisements, newsletters, event & tournament	

Key Area	RQ	Interview Question	Priority
		<p>sponsorship, dinners,</p> <p>What did you notice, like/dislike about them?</p> <p>Which of these, if any influenced your choices of retirement village?</p> <p>What do you think this organisation/this village seeks to achieve with these activities? (other than residents in villages)?</p>	
3.	4.2	Many of today's organisations promote not only their services, but also themselves, retirement, and "this generation of seniors" in newspapers, TV, websites, brochures etc.	
		<p>Prompts/probes/follow up questions:</p> <p>How do you think this organisation likes to present itself as in these forums?</p> <p>How do you account for this? Reasons?</p> <p>How would you describe this organisation in terms of its Personality? Culture? Values?</p> <p>What do you think of this culture?</p> <p>How do you think this organisation presents retirement to you?</p> <p>How do you think this organisation presents "getting older" "ageing"?</p>	
4.	4.4	Let's look at what some organizations say in their promotional material – this organisation included	
		<p>Prompts/probes/follow up questions:</p> <p>Look at these – which do you think are effective – and why? (show OHTs or samples)</p> <ul style="list-style-type: none"> o About their product/service? o About themselves? o About people? o About ageing? <p>What others say? ...</p> <ul style="list-style-type: none"> o E.e. testimonials (show ads using these) o Friend, current residents, family? <p>What they do? ...</p> <ul style="list-style-type: none"> o How they treat enquiries? o How they treat people? o How they treat family? 	
5.	3.1 and 3.2	What personal factors do you think influences people to move into a retirement village? (e.g., preferences, needs, finance, location, etc)	
		<p>Prompts/probes/follow up questions:</p> <p>How do you know about them? (contacts, reading material etc)</p>	
6.	3.3	Now, let's talk about your view on ageing, people, retirement in general.	

Key Area	RQ	Interview Question	Priority
		What do you think about ageing, getting older?	
		What is retirement? <ul style="list-style-type: none"> o How did you learn that?/come to that 	
		What is "old" or "ageing" mean to you? What similarities/differences do you notice ageing and people of say 30 years ago, and now? E.g. your grandparents/parents How do think NZ society sees ageing and people – then and now? Where would you place yourself in terms of this societal view on ageing and people? What do you think about retirement villages, resthomes, hospitals, serviced apartments and the like?	
7.		Finally, lets talk about the ways this organisation/ this village and residents communicates with each other?e.g. Meetings, newsletters, clubs <ul style="list-style-type: none"> • What kinds of things happen everyday? Weekly? Monthly? Annually? • How do you communication with V or this village? • Which forums work well for you? • What do you think are some of the barriers to effective communication with V/this village? 	

Well, that's it from me. Do you have any questions for me? Do you want to meet again?

Here is my contact phone number & address (email inc) should you think of anything more you want to know about...Business cards

APPENDIX 4

Timeline for data collection

Month	Day/Date	Data Gathering
Mar 2004		First contacts with RVOs
April		Interviews - employees Interviews - employees Interviews - employees
May		Interviews - employees Interviews - employees
June		FG- Residents FG- Residents
July	Tue 20 Thurs 22	FG - Residents Interviews- employees FG - Residents
Aug	Tue 3 Thurs 5 Wed 11 Thurs 12 Wed 18 Wed 19 Wed 25 Thurs 26 Fri 27 Mon 31	Interviews - employees FG- Residents FG- Residents Interviews - employees Interviews - Presentation - Interviews - employees Interviews - employees Interviews - employees Interviews - employees
Sep	Wed 8 Thurs 9 Tues 14 Thurs 16 Fri 17 Tues 21 Mon 27 Tues 28 Wed 29	Interviews - employees FG - residents Interviews - employees Presentation Presentation Interviews - employees Interviews - employees Interviews - employees Interview - employees

Month	Day/Date	Data Gathering
Oct	Wed 6	
	Thur 7	Recruiting FG participants
	Mon 11	Interviews - employees
	Tue 12	Interviews- employees
	Wed 13	Interviews- employees FG - residents FG - residents
	Thurs 14	Interviews- employees
	Fri 15	Recruiting FG participants
	Mon 18	FG - non- residents
	Nov	Tues 9
	Wed 10	FG - non-residents
Mar 2005		FG - non-residents FG - non-residents FG - non-residents

APPENDIX 5

Sample of Coding Tools

A Check-sheet for Recording Key Terms in Interview and Focus Group Texts

Key Term “	When/where used			
“Community”	Non-residents	Residents	Village Staff	Senior
Defines “community” specifically explains features of “community”				
“the community” – usually used in conjunction with something else e.g. “of value to the community”; “go out there in the community”;				
“a community” : a given group or location; e.g., used as in “it’s a smaller community than”				
“Community” – as wider community as label only – external to retirement villages eg. “retirement village are part of the wider community”				
“Community services as label only – usually external to retirement villages				
“Retirement village Community” as label only				
“Retirement village Community” as value; may define e.g., “retirement villages have community feel and spirit”, explain features of RV as “community”				
“Community facilities” usually in reference to facilities at retirement villages				
“Retirement village Community” defines/explains features of RV as “community”; as sense of belonging				
“sense of community” as sense of belonging, connection				
Designing community – usually as retirement village				

Key Term “	When/where used			
“Community”	Non-residents	Residents	Village Staff	Senior
Rvo as “community” and “community of villages”				
retirement villages as creating “community”				
Community as attitude – staff & residents				
Older people’s views on community				
Business community - label				
“Genuine community” retirement villages as such – usually defines key features of as in “a genuine community is...”				
Community as identity Claim – e.g., my, our				
Other				

Analysis coding sheet: Use a separate sheet for coding each article. Continue coding for an individual article on two or more pages.

Type: Potential Investors Brochure

5 documents (in order of presentation)

1. Booklet: “First Banking Debenture Stock; 18 months 7.5%; 24 months 8.5%; 36 months 9.00%”
 - 10 pages plus cover (4 pages)
 - 5 Sections”
 - T1= “Key *Investment* Features” (original italics) 1 page
 - T2= “Industry *Overview*” (original italics) 2 pages
 - T3= “Vision *Senior Living Philosophy*” (original italics) 2 pages
 - T4= “Our Villages *Our Residents*” (original italics) 4 pages
 - T5= “Directors” 1 page

RVO D/2	Type of doc	Where printed	Year	If internal doc Total pages	No. of articles	Avg pp/article	Pp with prose	Pp with photo
RVO D	Investor Broch.		July 2004	10 + cover (14)			10 + cover (12)	10 + cover (12)
Title of doc	First ranking debenture stock 18 months 7.5% 24 months 8.5% 36 months 9.00%							
Powerful or illustrative quotations with pp nos			Values mentioned (see list). words or phrases;			Accounts. Episode; min one paragraph; commentary on specific decisions (past, present, future). (1) brief (one sentence) description: identify (2) value(s); (3) target(s) of a/c; & (4) targets of identification		
<p>(T2) <u>We</u> at Vision Senior Living believe that “baby boomers” will not “retire” in the same way as their parents. They will definitely not stop work. Their home will not become a cocoon in which they live out their golden years. (p. 3)</p> <p>(T3) As far back as 1996, the founding directors of Vision Senior Living had already started to <u>appreciate the trends</u> that were going to bring extraordinary growth to the “retirement industry” (p. 4)</p> <p>(T3) But perhaps the <u>greatest breakthrough</u> in Vision Senior Living’s attitude to retirement living came with the realisation that villages could be built which were to all intents and purposes “resorts”. (p. 4)</p> <p>(T1) = Key <i>Investment</i> Features <u>To meet</u> the growing desire of New Zealanders to live in a Vision Senior Living <u>community</u>, the company is offering first ranking debenture stock. (p. 1)</p> <p>(T3) = Vision <i>Senior Living Philosophy</i> H= Locations at the <u>heart of the community</u> Vision Senior Living retirement villages would be centrally located, where residents could be within walking distance of shopping centres, community, health and leisure facilities that provide a natural adjunct to the villages own amenities. (p. 5)</p>			<p>(1) Achievement/performance/success: (T1) “major force” ... completed 117 retirement dwellings; (T3) “perhaps the greatest breakthrough in Vision Senior Living’s attitude to retirement living came the realisation that villages could be built which were all intents and purposes “resorts” (T4) Sales and rate of growth in each of the villages (hitting or exceeding sales and construction targets</p> <p>(2) Adaptation to social/business changes: (T1) demand for retirement village living will increase dramatically over the next 20 years (T2) Uses four ideas to support the organisation’s focus on retirement villages – an ageing population, growing population, changing expectations of “Boomers” and greater acceptance of retirement villages. This organisation is “doing nothing” other than adapt to environmental changes (T3) details specific changes i.e., New Zealanders expectations of home and lifestyle ... and the organisation’s response i.e., it’s philosophy (also prestige/ reputation)</p> <p>(3) Prestige/product/service: (T1) “to meet the growing desire of New Zealanders to <u>living in a VSL community</u>” (organisation prestige) (T3) details organisation’s philosophy – heart of the community (resident wellbeing), focus on hospitality (customer service), flexible financial options (customer focus), quality design & construction (prestige), long term relationships (also innovation,</p>			<p>A. Not strictly an account – rather a persuasive text on reasons for investing in retirement villages</p> <p>1. Foregrounds the organisation and its response to growing numbers of people entering the “retirement age”. Promotes organisation AND sector as worthy of investment.</p> <p>2. Argues: Growing numbers of residents are dependent on the “resort” retirement village concept because that’s what 65+ year olds want.</p> <p>Values: see middle column</p> <p>3. Target Investor audience: Growing numbers of residents mean good financial returns.</p>		

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RVO D	Investor Broch.		July 2004	10 + cover (14)			10 + cover (12)	10 + cover (12)
Other comments and notes e.g. absent values			<p>& wellbeing): (T4) Each of the villages is described (product prestige i.e., material manifestation of organisation philosophy) in terms of its size & location, design & architecture, and style of "village", and implies benefits for investors (e.g., good locations, growth, and sales imply good investment).</p> <p>(4) Credibility: (T1) "the considerable <u>equity</u> Vision Senior Living <u>already holds</u> in a number of companies" (trustworthy investment); (T2) organisation has "done the homework" " [my words] with these stats; "even if growth is modest, it will compound demand for retirement village dwellings" (T3) Links trends (more specific social rather than demographic figures) with organisation's own philosophy (T4) Sales in each of the villages (also achievement/success)</p>					
<p>1. Terms (excluding proper names) in "quotation marks": (T1) "resort"; (T2) "baby boomers" x3, "boomers" x 2 [4th & 5th refs] "retirement", "retirement age" x 2, "boom", "retirement industry", "ageing" population, "retire"; (T3) "resorts"; "just in case"; "wellness"; (T4) "resort"; "off the plan"; "village" design.</p> <p>Suggests playfulness with current meanings of words; organisation's use is convenient because that is the current language, but the quotation marks imply that these words don't really – and also that its readers may agree.</p>								
<p>2. Terms such as age and ageing: few references except in quotation marks, which implies a sense of irony and/or that these terms are not taken seriously by the organisation – and invites the reader to agree. These are terms that others may use, but we (like you?) don't.</p> <p>Strength: Aligns with the notions of "positive ageing" What does it say about "agelessness" as opposed to "agefulness"?</p>								
<p>3. The word customer is NOT used: instead residents referred to as "residents", or "resident</p>								
			<p>Consistent or recurrent linkages of values e.g., retirement is choice,</p>			Apparent logics to be inferred (refer to list)		
			<p>Growing numbers of 65+ = growing numbers of 65+ choosing retirement village [indirect links]</p>			See values		
			<p>Discourses in use "universal, historically situated, set of vocabularies"... "orders of discourse"</p>					

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RVO D	Investor Broch.		July 2004	10 + cover (14)			10 + cover (12)	10 + cover (12)
clientele" or more generally as "ppl 65+" or "New Zealanders" o				<p>Market discourse: presents leisure as a desirable "commodity" and "retirement" and retirement village living as leisure materialised; vocab e.g., "investment" "resort", implies "customers" [word not used see above].</p> <p>"Clientele" implies service and choice and payment which are key concepts in the market model. Signals change – in market speak "point of difference" e.g., "A culture of service would be instilled in all staff to provide everyday courtesy, respect and helpfulness to the resident clientele, and at the same time catering for their traditional health and personal needs."</p> <p>Notion of "discerning customer" implied with 65+ "wanting a retirement 'resort' lifestyle. Inference is that if these people desire this, those with money would be mad not to invest financially.</p>				

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RVO D	Investor Broch.		July 2004	10 + cover (14)			10 + cover (12)	10 + cover (12)
(1) Sections, titles, subtitles, Beginnings			(2) End of sections			(3) Terms at mathematical centre		
<p>T 1 = <i>Key Investment Features</i> (original italics) B = Vision Senior Living is a major force in the retirement industry... In year to March 2004.... Completed 117 retirement dwellings</p> <p>T2 = <i>Industry Overview</i> B= In 2006 the first of the "Baby Boomers" will turn 60. It will signal the start of a twenty year period when a generation of babies born in the post-war years will reach the age of "retirement</p> <p>T3 = <i>Vision Senior Living Philosophy</i> B= As far back as 1996, the founding directors of Vision Senior Living had already started to appreciate the trends that were going to bring extraordinary growth to the "retirement industry".</p> <p>T4= <i>Our Villages Our Residents</i> B= Vision Senior Living intends to make mortgage advances and investments in subsidiary and associated companies to fund this development and expansion of retirement villages, particularly the five Vision Senior Living branded retirement village. The principal assets of Vision Senior Living are the equity it holds in village owning companies (through its investments) and secured advances to village owning companies.</p>			<p>E= [debenture] Holders may elect to have interest paid quarterly or compounded</p> <p>E= RVO D expects the proportion [of pple over 65 in retirement villages] to increase, and even if that growth is modest, it will compound the demand for retirement village dwellings already anticipated by the above-mentioned factors.</p> <p>E= Today this philosophy [described in text] has been inculcated in the five Vision Senior Living villages ... becoming home to a growing number of residents since Vision Senior Living began in 1996.</p> <p>E= [no specific ending. This opening is followed by snap shop descriptions of each of the five villages. See code sheet further on for details.</p>			<p>T = <i>Key Investment Features</i> <u>To meet</u> the growing desire of New Zealanders to live in a Vision Senior Living community, the company is offering first ranking debenture stock.</p> <p>T= <i>Industry Overview</i> H= Changing expectations We at Vision Senior Living believe that "baby boomers" will not "retire" in the same way as their parents. They will definitely stop work. Their home will not become a cocoon in which they live out their golden years.</p> <p>T= <i>Vision Senior Living Philosophy</i> H= Locations at the heart of the community Vision Senior Living retirement villages would be centrally located, where residents could be within walking distance of shopping centres, community, health and leisure facilities that provide a natural adjunct to the villages own amenities.</p> <p>T= <i>Our Villages Our Residents</i></p>		

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Cluster analysis: Which key terms go with what			Cluster analysis (1): Key terms (frequency/section)			Cluster analysis (cont) : Which terms go with what																																																																																																											
<p>Retirement/R. age/"retire": (T2) notional age of "retirement"; importantly, there will be far more reaching this "retirement age"; we ... believe that "baby boomers" will not "retire"</p> <p>R. industry/ "R. industry" : (T1) Vision Senior Living is a major force in the <u>retirement industry</u>; (T2) that ["boom" in numbers of 65+] will have dramatic consequences for any business involved in the "retirement industry"; (T3) As far back as 1996, the founding directors of Vision Senior Living had already started to appreciate the trends that were going to bring extraordinary growth to the "<u>retirement industry</u>"</p> <p>Retirement villages/dwelling: (T1) demand for <u>retirement village</u> living will increase dramatically in New Zealand over next 20years; increasing propensity for 65+ year olds wanting to live in a <u>retirement village</u>; [Vision Senior Living] on completion of building programme will provide over 1000 <u>dwellings</u>; (T2) [tables] Increase in the number of <u>retirement village</u> residents x 2; number of new <u>retirement village</u> units needed x 2; number of new <u>retirement village</u> developments needed x 2; Investment in <u>retirement village</u> required x 2; demand for <u>retirement village</u> dwellings; just 3.5% ... choose a <u>retirement village</u> as their home; (T3) Vision Senior Living embraced a set of five key principles that would govern the development of all <u>retirement villages</u> under the company's brand; Vision Senior Living <u>retirement villages</u> would be centrally located; (T4) Vision Senior Living branded <u>retirement villages</u>; Vision Senior Living was first to appreciate the</p>			<p>Terms for people over 65 an/or residents:</p> <table border="0"> <tr> <td><i>Section T</i></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>65+ year olds/65+/Over 65:</td> <td>3,</td> <td>6,</td> <td>0,</td> <td>0</td> </tr> <tr> <td>New Zealand/ers:</td> <td>1,</td> <td>3,</td> <td>2,</td> <td>0</td> </tr> <tr> <td>People</td> <td>0,</td> <td>1,</td> <td>1,</td> <td>0</td> </tr> <tr> <td>Residents:</td> <td>0,</td> <td>2,</td> <td>5,</td> <td>2</td> </tr> <tr> <td>Resident clientele [unique]</td> <td>0,</td> <td>0,</td> <td>1,</td> <td>0</td> </tr> <tr> <td>Pronouns: you/your (not at all)</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Pronouns: Their/they</td> <td>0,</td> <td>4,</td> <td>4,</td> <td>0</td> </tr> <tr> <td>Org Pronouns: our/we/us</td> <td>0,</td> <td>1,</td> <td>0,</td> <td>0</td> </tr> <tr> <td>Retirement/R. age/"retire":</td> <td>0,</td> <td>3,</td> <td>0,</td> <td>0</td> </tr> <tr> <td>R. industry/ "R. industry"</td> <td>1,</td> <td>1,</td> <td>1,</td> <td>0</td> </tr> <tr> <td>R. Villages + dwellings</td> <td>3,</td> <td>10,</td> <td>2,</td> <td>3</td> </tr> <tr> <td>R. /"resort" /lifestyle</td> <td>1,</td> <td>2,</td> <td>3,</td> <td>3</td> </tr> <tr> <td>R. community/ies</td> <td>0,</td> <td>0,</td> <td>1,</td> <td>1</td> </tr> <tr> <td>R. Living/R. facilities</td> <td>0,</td> <td>0,</td> <td>2,</td> <td>0</td> </tr> <tr> <td>R. Development/s</td> <td>0,</td> <td>0,</td> <td>0,</td> <td>1</td> </tr> <tr> <td>Name of company:</td> <td>3,</td> <td>3,</td> <td>8,</td> <td>10</td> </tr> <tr> <td>(repeat line) Org P/nouns: our/we/us</td> <td>0,</td> <td>1,</td> <td>0,</td> <td>0</td> </tr> <tr> <td>Villages (only)</td> <td>0,</td> <td>0,</td> <td>4,</td> <td>7</td> </tr> <tr> <td>Age/aging (above)</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Resort/hotel (above)</td> <td></td> <td></td> <td></td> <td></td> </tr> </table>			<i>Section T</i>	1	2	3	4	65+ year olds/65+/Over 65:	3,	6,	0,	0	New Zealand/ers:	1,	3,	2,	0	People	0,	1,	1,	0	Residents:	0,	2,	5,	2	Resident clientele [unique]	0,	0,	1,	0	Pronouns: you/your (not at all)					Pronouns: Their/they	0,	4,	4,	0	Org Pronouns: our/we/us	0,	1,	0,	0	Retirement/R. age/"retire":	0,	3,	0,	0	R. industry/ "R. industry"	1,	1,	1,	0	R. Villages + dwellings	3,	10,	2,	3	R. /"resort" /lifestyle	1,	2,	3,	3	R. community/ies	0,	0,	1,	1	R. Living/R. facilities	0,	0,	2,	0	R. Development/s	0,	0,	0,	1	Name of company:	3,	3,	8,	10	(repeat line) Org P/nouns: our/we/us	0,	1,	0,	0	Villages (only)	0,	0,	4,	7	Age/aging (above)					Resort/hotel (above)					<p>65+ year olds/65+/Over 65: (T1) Growing proportion of <u>65+ year olds</u>; The increasing propensity of <u>65+ year olds</u> to elect to live in retirement village; The rising expectations of <u>65+ year olds</u> wanting a retirement "resort" lifestyle; (T2) Currently the New Zealand population <u>over the age of 65</u> is only 12%; growth in <u>over 65 year olds</u>; Today there are some 450,000* New Zealanders <u>over the age of 65</u>; Just 3.5* of people <u>over the age of 65</u> choose a retirement village as their home; If existing <u>65+</u> take up remains the same; If existing <u>65+</u> if take up increases.</p> <p>New Zealand/ers: (T1) To meet the growing desire of <u>New Zealanders</u> to live in Vision Senior Living community (T2) <u>New Zealand</u> population over the age of 65 x 3(T3) changes were occurring in <u>New Zealanders</u> expectations of home and lifestyle; <u>New Zealanders</u> were developing greater expectations of the design and construction of their home</p> <p>People: (T2) <u>people</u> over the age of 65; (T3) <u>people</u> were preferring to be closer to town;</p> <p>Residents: (T2) Increase in number of retirement village <u>residents</u> x2; (T3) where <u>residents</u> could be within walking distance; clientele; allowing maximum [financial] flexibility for Vision Senior Living <u>residents</u>; where <u>residents</u> could enjoy privacy and independence; Vision Senior Living anticipated that <u>residents</u> would spend a long, healthy and happy lifestyle (T4) <u>residents</u> are WG's best testimonial; an</p>		
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Org Pronouns: our/we/us	0,	1,	0,	0																																																																																																													
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R. industry/ "R. industry"	1,	1,	1,	0																																																																																																													
R. Villages + dwellings	3,	10,	2,	3																																																																																																													
R. /"resort" /lifestyle	1,	2,	3,	3																																																																																																													
R. community/ies	0,	0,	1,	1																																																																																																													
R. Living/R. facilities	0,	0,	2,	0																																																																																																													
R. Development/s	0,	0,	0,	1																																																																																																													
Name of company:	3,	3,	8,	10																																																																																																													
(repeat line) Org P/nouns: our/we/us	0,	1,	0,	0																																																																																																													
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Age/aging (above)																																																																																																																	
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			Cluster analysis (cont)																																																																																																														
			Name of company = Vision Senior Living:																																																																																																														
			(T1) <u>Vision Senior Living</u> is a major force; the company is offering first ranking debenture stock; already holds a number of companies; (T2) we at <u>Vision Senior Living</u> believe that "baby boomers" will not "retire" in the same way as their parents; "Boomers" will be looking for the sort of lifestyle that <u>Vision Senior Living</u> provides; <u>Vision Senior Living</u>																																																																																																														

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<p>opportunity to develop a <u>retirement village</u> that could capitalise on the appealing green parkland; an obvious extension to Vision Senior Living's portfolio of <u>retirement village</u> investments has been the planning of [another village];</p> <p>Retirement/Resort/lifestyle: (T1) 65+ plus year olds wanting a <u>retirement "resort" lifestyle</u>; (T2) "Boomers" will want to continue to lead an active lifestyle; [ditto] be looking for the sort of <u>lifestyle</u> that Vision Senior Living provide; (T3) perhaps the greatest breakthrough in Vision Senior Living's attitude to retirement living came the realisation that villages could be built which were all intents and purposes "<u>resorts</u>"; the company ... could boast the recreation, leisure and social facilities that characterised the <u>resorts</u> where many of us escaped for an annual holiday; like a <u>resort</u>, the accommodations could be either garden villas or multi-level apartments clustered about garden courtyards and spacious atria giving a sense of both privacy and community; (T4) WG is a true "<u>resort</u>" – with swimming pool [etc lists amenities]; resort-style leisure, activities and social complex; as with other Vision Senior Living group <u>retirement resorts</u>, the development centrepiece will be a communal facility housing [lists amenities].</p> <p>Retirement community/ies: (T3) the company conceived <u>Retirement community</u> that ... facilities that characterised the resorts [see T3 above]; (T4) Vision Senior Living's second <u>community</u> occurred in the fastest growing residential area in New Zealand; architects were determined to discover the character, charm and sense of <u>community</u> that characterised villages of old and the New Zealand of yesteryear</p>			<p>expects this proportion [of pple over 65 who will choose retirement village as their home] to increase; (T3) <u>Vision Senior Living</u> philosophy; As far back as 1996, the founding directors of <u>Vision Senior Living</u> had already started to appreciate the trends that were going to bring extraordinary growth to the "retirement industry"; perhaps the greatest breakthrough in <u>Vision Senior Living's</u> attitude to retirement living; retirement villages would be located...; allowing maximum [financial] flexibility for <u>Vision Senior Living</u> residents; <u>Vision Senior Living</u> would adopt the mantle of a hospitality provider; <u>Vision Senior Living</u> anticipated that residents would spend a long, health and happy lifestyle; today this philosophy has been inculcated into <u>Vision Senior Living</u> villages; (T4) <u>Vision Senior Living</u> intends to make mortgage advances and investments in subsidiary and associated companies to development expansion of retirement villages, particularly the five <u>Vision Senior Living</u> branded retirement villages; principal assets of <u>Vision Senior Living</u>; first of <u>Vision Senior Living's</u> retirement developments; <u>Vision Senior Living's</u> second community naturally occurred...; <u>Vision Senior Living</u> recently set a sales record for the company by selling...; <u>Vision Senior Living</u> was first to appreciate the opportunity to develop a retirement village that could capitalise on the appealing green parkland; joint venture between <u>Vision Senior Living</u> and the racing club; an obvious extension to <u>Vision Senior Living's</u> portfolio of retirement village investments has been the planning of [another village]; a subsidiary of <u>Vision Senior Living</u> entered into a joint venture; As with other <u>Vision Senior Living</u> group retirement resorts...;</p>			<p>impressive 40% of ongoing sales last year came about as a result of referrals from existing <u>residents</u></p> <p>Resident clientele: (T3) [unique use of term] A culture of service would be instilled in all staff to provide everyday courtesy, respect and helpfulness to the <u>resident clientele</u>, and at the same time catering for their traditional health and personal needs.</p> <p>Pronouns: Their/they: (T2) We at Vision Senior Living believe that "baby boomers" will not "retire" in the same way as <u>their</u> parents. <u>They</u> will definitely not stop work. <u>Their</u> home will not become a cocoon in which <u>they</u> live out their golden years. (T3) [People] <u>They</u> were preferring to be closer to town or the centre of a community; <u>They</u> were dispensing with the traditional quarter-acre section as <u>they</u> found interests outside gardening and home maintenance. <u>They</u> were opting for smaller living spaces befitting <u>their</u> needs, rather than retaining large family homes [all this in bold text]</p> <p>Villages (only): (T3) the realisation that <u>villages</u> could be built... that were resorts; Vision Senior Living <u>villages</u> would adopt ...; Vision Senior Living <u>village</u> residents; architecturally designed <u>villages</u> ...; long, healthy and happy lifestyle at the <u>village</u>; (T4) <u>village</u> owning companies x 2; preferred villages in eastern suburbs; <u>village's</u> communal facilities; Unique appeal of FLG has been its "<u>village</u>" design; ... architects were determined to discover the character, charm and sense of community that characterised <u>villages</u> of old and the New Zealand of yesteryear; fledgling <u>village</u> development and rebranded it.</p>		

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<p>Retirement Living/ Retirement facilities: (T3) Vision Senior Living's attitude to <u>retirement living</u>; traditional <u>retirement facilities</u> focussed on healthcare, Vision Senior Living villages adopt the mantle of a hospitality provider</p> <p>Retirement Development/s: (T4) WG was the first of Vision Senior Living's Retirement <u>Developments</u>.</p>			<p>Pronoun We/our: (T2) <u>We</u> at Vision Senior Living believe that "baby boomers" will not "retire" in the same way as their parents. They will definitely not stop work. Their home will not become a cocoon in which they live out their golden years. (T4) H=Our Villages <i>Our Residents</i>.</p>			<p>Pronoun We/our: (T</p>		
Equations (E) and Oppositions (O)			Metaphors in use; List and tally frequencies			Optional: Enthymeme (premises)		
<p>Tradition = institutions and healthcare Current = resorts and hospitality e.g., Whereas traditional retirement facilities focussed on healthcare, Vision Senior Living villages adopt the mantle of a hospitality provider</p>			<p>Cocoon: (T2) their home will not become a <u>cocoon</u> ... Golden years: ... in which they live out their <u>golden years</u>. Mantle: Vision Senior Living adopts the <u>mantle</u> of a hospitality provider Breakthrough: perhaps the greatest <u>breakthrough</u> in Vision Senior Living's attitude to retirement living came the realisation that villages could be built which were all intents and purposes "resorts" Heart: (Heading) Locations at the <u>heart</u> of the community. Vision Senior Living retirement villages would be centrally located, where residents could be within walking distance of shopping centres, community, health and leisure facilities that provide a natural adjunct to the villages own amenities.</p>			<p>Change is happening in New Zealand; Investing in retirement villages is good: (T1) [pop stats; increasing numbers choosing retirement villages; expectations about resort style retirement] (T2) the whole section – spells out list of reasons given in T1; (T3) id's changes "New Zealanders" expectations of home and lifestyle & links organisation's "philosophy" with these changes [puts in future]</p>		
Images (1): what pictures, used where; colours?			Images (2): Associated text			Images (3): Key ideas rep'd		

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Key themes (summary)			As indicated by (text/pictures)					

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