Sustainable Futures and the Development of New Retirement Villages

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Abstract

Retirement villages and retirement communities have existed since Roman times. Whilst enduring and sustainable as a concept, recent years have witnessed a considerable expansion in the UK in new retirement developments. Despite this expansion, we know very little about what it is like to live in, and age in, such villages over time in the UK. In this plenary presentation, I consider whether these new retirement villages are both sustainable and sustaining for those who live in them. Even if they didn’t start out that way, will they, as Maggie Kuhn – the former charismatic leader of the Gray Panthers in the US – argued, turn into ‘geriatric ghettos’ and are they simply, as she put it, ‘playpens for the elderly’? Whilst they appear to be attractive to older people from all kinds of backgrounds, what does the proliferation of these villages – aimed solely at people over the age of 50/55 - say about society’s attitudes towards ageing and old people? Why hide them away on the edges of towns and the margins of community life – sealed away – often literally behind walls and gates – from younger generations? In policy terms, this seems to run directly counter to current government strategies aimed at social inclusion, community cohesion and intergenerational engagement.

Acknowledgements

Whilst I am clearly responsible for everything I say here, I want to begin by acknowledging the debt I owe to all the colleagues and students with whom I’ve worked on this and closely related topics over the last 25 years. At Keele, we have been undertaking research on retirement communities since the mid-1990s - but I personally have very long standing interests in housing, the environment, urban design, and in issues around ‘space and place’ having graduated, originally, as a social geographer. During my six years as Research Officer at the Beth Johnson Foundation in the 1980s, the one thing that people always knew about us - or rather, got us mixed up with - was the Beth Johnson Housing Association. This was, in fact, the Foundation’s very first development project which then outgrew the Foundation and became a
separate organisation. We had a Beth Johnson sheltered housing complex in the building next door to us and many of the tenants joined in activities at the Foundation. So, although we were never formally able to research the housing association, I used to talk with the men and women living there about what the benefits and drawbacks were to this kind of retirement community. It was whilst I was at the Foundation, that I also first attended BSG conferences and got to know many colleagues who have been important supports and sources of inspiration and help over the years - and discovered that, like me, a number of them were originally geographers!

Since taking up my academic post at Keele in 1988, I have taught about retirement communities on our Masters/Diploma and Certificate courses in Gerontology and on various undergraduate courses. As our research on retirement communities has gathered momentum, we have built too on the critical orientation and earlier research for which our own Centre for Social Gerontology is known including, for example, our studies of the family and community life of older people; of informal care; and of older people living in deprived communities. Past projects, former colleagues and of course present colleagues, have therefore all been important to the thinking and work we are currently doing. More widely too, colleagues associated with the ‘Housing and Care for Older People Research Network’ (http://www.hcoprnet.org.uk/) are crucial in what is now a growing area for research and policy critique in this country - and what I shall say in the main part of my presentation, is underpinned by the accumulating evidence base and policy critiques to which we are all contributing.

Introductory Remarks

In order to set the scene, let me just comment on the remarkable growth in retirement village developments in the UK, and indeed elsewhere, over the last decade or so. If you Google ‘UK Retirement Villages’ you get over 310,000 hits in a quarter of a second! Looking at some of the images and language used on these sites would be a research project in itself. There is an emphasis on things like: the beautiful settings; luxury accommodation; hand-picked locations; their pioneering nature; tailor-made services; living a fulfilled lifestyle; security, comfort and companionship; a new concept in retirement living; and the support of professional and skilled staff. On the whole though, these are mostly private developments which show us just how these communities are now being ‘sold’ to people who – at least up until the recession began to bite – can afford them.

Drawing on the experience outlined above, and on the research which has been and is taking place, what I would like to try and do is consider where we are in respect of UK research and developments and present some thoughts about what the challenges might be especially for research and, by implication, for the communities themselves and for wider policy.

I want to ask - and see if I can go some way towards providing answers - to two, ostensibly very simple questions:
Are new retirement villages sustainable?

and

Are new retirement villages sustaining?

I propose to do this by considering the following areas and issues:

- The policy context/policy drivers
- What’s in a name? New? Retirement? Village?
- The evidence base
- Sustainability – environment and design issues
- Sustainability – social and community issues
- Challenges for research
- The Future – or where do you want to live?

**The Policy Context/Policy Drivers**

It is always difficult to know how far back or not to go when trying to paint the historical context - so I’m going to be a bit selective and try to encapsulate where our thinking and academic critique was 20 or so years ago by showing you this quotation:

‘This report is being written at a time of great turbulence for housing and associated policies… yet none of them are targeted specifically at older people. To a considerable extent, future housing issues and problems in later life are not being created by an ageing population but by a plethora of policy changes which have other objectives or are targeted at many more groups than just older people…Immediate policy goals must [therefore] aim to tackle…notably the relationship between sustainable and affordable housing and community care’.

(p144)

This quotation comes from none other than our conference organiser Robin Means and his then colleagues in Bristol University’s School for Advanced Urban Studies (Mackintosh et al., 1990). Their report was entitled *Housing in Later Life – the housing finance implications of an ageing society* and it examined the implications of the increasing population of older people for both housing policies and housing provision. Although it didn’t specifically look at retirement communities, and although sustainability as we’ve come to know it wasn’t really on the ageing or housing agendas, it did ask some difficult and challenging policy questions including:

- How best might we meet both the accommodation and care needs of people as they age?

- How might housing policy and health and social care policy get joined up?
and,

- With the growth in owner occupation as the dominant tenure in later life, would people be prepared to use their housing equity to pay for services in retirement?

I would suggest that there are still strong resonances today with the concerns from 20 years ago. However, one key difference is that policy then - as the quotation highlights - wasn’t really targeted at older people. Today, by contrast, I would argue that there has been a renewed political focus on older people - perhaps especially since the 2005 General Election. What then has driven the changes that we’ve seen? Clearly, demography has played a part but changes to family structures and associated changes in both expectations of, and willingness to provide family support for older relatives, have also had an impact. Increasing numbers of people live alone in old age and distance, migration and the forces of globalisation separate families both physically and emotionally.

Other drivers of policy would include growing concerns about the breakdown of communities which, today, find expression in social cohesion/social inclusion debates and policies; agendas around citizenship, civic engagement and around choice and flexibility in later life living arrangements; and, more recently, what is happening around age discrimination. Changes to work, employment, education and leisure and to what we expect of life in retirement with its associated notions about what makes for ‘active’ or ‘healthy’ or ‘successful’ later lives, have also driven some of the more recent policy initiatives. And last, but by no means least, growing concerns about the environment and what makes for sustainable and sustaining lifestyles for all age groups.

In respect of our current concerns I would therefore flag a number of policy documents, strategies and initiatives which have appeared since the start of the new millennium as crucial to our considerations. These include:

- July 2008: The Department of Health announces that it is making another £80 million available to local authorities and their housing partners between 2008 and 2010 for ‘extra care’ housing schemes. This will provide a further 2,000 flats including accommodation for people with dementia and other long-term conditions. There will be 25 of these schemes on top of the £147 million made available between 2004 and 2008 which funded 72 extra care housing projects that provided approximately 4,200 separate dwellings.


• **2006:** *Our health, our care, our say: a new direction for community services*, (DoH).

• **January 2006:** *A Sure Start to Later Life: Ending Inequalities for Older People*, (SEU/OPDM).

• **2003:** *Preparing Older People’s Strategies – linking housing to health, social care and other local strategies*, (DoH, ODPM and the Housing Corporation).

• **Feb 2003:** The Deputy Prime Minister launches *Sustainable Communities: Building for the future*. The Plan set out a long-term programme of action for delivering sustainable communities in both urban and rural areas. It aims to tackle housing supply issues in the South East, low demand in other parts of the country, and the quality of our public spaces. The Plan includes not just a significant increase in resources and major reforms of housing and planning, but a new approach to how we build and what we build.

• **2002:** *Quality and choice for older people’s housing – the story so far*, (DoH and ODPM).

• **2001:** *Quality and choice for older people’s housing: a strategic framework*, (Dept for Environment, Transport and the Regions, and DoH). First time a vision was set out for older people’s housing and housing-related support.

The 2008 National Strategy is especially important. Its key elements and aspirations relating to older people and ageing include:

• ‘Housing options for older people shouldn’t be limited to ‘care homes or sheltered housing’. (p11)

• Accommodation and care needs to be ‘future proofed’: ‘so that it does not alienate or exclude; and to allow everybody, regardless of age, to participate and enjoy their home and their environment for as long as possible’. (p11)

• Need to design homes and communities to meet people’s changing needs as they grow older: ‘all public housing will be built to Lifetime Homes Standards by 2011. Our aspiration is that all new housing will be built to these standards by 2013’. (p14)

• Life time neighbourhoods as well as lifetime homes: ‘where older people are not left out or forgotten… where transport, good shops, green spaces, decent toilets, and benches, are consciously planned for people of all ages and conditions in mind’. (p15)
As I present some of the research evidence, consider if you would whether new retirement villages fulfil these aspirations? Consider too if they provide answers to my two questions about their sustainability and their sustaining of the people who live in them?

New Retirement Villages

Before looking at the evidence base, I want to ask: what’s in a name? What in fact do we mean by the phrase ‘New Retirement Village’?

**New?** – we have in fact had such communities in Britain since Roman times. Briefly, we can trace the historical development of these communities as follows:

- **Roman times**: the Roman Government built retirement villages for military officers who retired from active duty with distinguished service records. They were located on the outskirts of large cities/towns and equipped with gymnasia, baths and other recreational facilities.

- **Medieval times**: in England, the guilds constructed villages – again on outskirts of towns and cities – especially for retired craftsmen. Also, across Europe, there was the development of retirement schemes with religious affiliations.

- **17th/18th centuries**: saw the development of inland spas (e.g. Bath which had flourished in Roman times and then became a popular centre again in the 17th century!) and then coastal resorts as favoured retirement areas. Growth was due to a combination of the promotion of the health-giving qualities of sea-bathing; royal patronage; and the spread of rail travel. Both spas and resorts had a role as residential locations for sick and older people, with wealthy people having both town houses and seaside houses.

- **19th/20th centuries**: in England, there was an expansion in the proportions of older people moving to/living in seaside resorts like Worthing, Hastings and Hove. In the USA, there were similar unplanned movements of older people to areas of milder climate - notably Florida, Arizona and California.

- **Second half of 20th century**: saw the emergence – in the USA in particular – of what Michael Barker (1966) from the University of California called ‘planned-package retirement communities’ which were often called ‘retirement villages’. In 1956 there were no such developments in California; by 1966, there were 35 ‘villages’ with a total of 54,000 elderly residents (see also: Pastalan et al., 1984).

- **21st century**: by 2001 there were around two thousand retirement communities in the UK. As Simon Evans notes in his forthcoming book *Community and ageing in housing with care settings*, they first
appeared in the 1950s as groups of privately owned residences for retired older people in relatively good health who were able to live independently. However, the nature of retirement communities has broadened and they now incorporate a range of housing options, including privately owned apartments, extra-care housing, nursing care homes and specialist dementia care units.

What then of the word retirement?

If ‘new’ is difficult in this context, then the word ‘retirement’ is even more problematic, not least because retirement itself and our understanding of it has changed markedly over the last 100 years or so. With my Keele colleagues, I have argued elsewhere that the word ‘retirement’ sits uneasily with the ethos many of the developers of these villages are trying to promote (Bernard et al., 2004). Far from wanting people to retire, they are presented very much as environments in which people are presented with opportunities to participate, and to get or stay active. In fact, in our study of Berryhill Retirement Village (Bernard et al., 2004), residents and other respondents pointed out that using the word ‘retirement’ in the phrase ‘retirement village’ or ‘retirement community’ often meant that both they and their families had expectations that people would be looked after in ways akin to being in a residential home or, even, a nursing home. We also know from early studies of these environments that retirement - in the sense of formal retirement from paid work - may not in fact be ‘the most important reason for seeking a new residence’ or moving to a retirement village (Marans et al., 1977). In fact, the word ‘retirement’ has been dropped in some of the newer developments, as in the case of our current study of Anchor Trust’s flagship retirement community at Denham Garden Village in Buckinghamshire.

Denham Garden Village, July 2008 – current site of the LARC project (www.keele.ac.uk/larc)
Lastly, what then of the word *village*? As a geographer, you might think that there would be a fairly simple and straightforward definition of what a village is - but not so!

In early 2002, five Government bodies, namely the Department for Environment, Food and Rural Affairs (Defra), the Office of the Deputy Prime Minister (ODPM), the Office for National Statistics, the Welsh Assembly Government and the Countryside Agency formed a consortium to commission a new definition of urban and rural areas and develop a classification (Bibby and Shepherd, 2004). This classification is based on a fairly complex methodology which is derived, initially, from a grid covering England and Wales and which has some 35 million cells each of 1hectare. From this is derived a measure of density which, when considered together with how the land is actually used (ie. its function in terms of the economic character), leads to a classification of settlement types. Settlement type and context are then brought together to create the classification. However, in terms of villages, what we get are a number of different morphological categories including things like ‘village’, ‘village envelope’, ‘village envelope (peri-urban)’, ‘sparse village’, ‘less sparse village’ and ‘dispersed villages’ in both sparse and less sparse areas!

At about the same time as this classification was being derived, the Department of Transport found in a survey that only a small number of local authorities had a formal definition of a village and those that did covered a range of different circumstances and complexity (DoT, 2004). They attempted to assist local authorities by providing a simple definition of a village based on the length of frontage and the number of houses. So, their definition of a village was: ‘a settlement of 20 or more houses; and a minimum length of 600 metres’.

By contrast, that other principle tool of the geographer, the Ordinance Survey, defines a village as: ‘a centre of population with an area less than 2.5 square kilometres (1 square mile). A village will always have a church’. This comes somewhat closer to the more common or familiar definitions we find in dictionaries or indeed, in the infamous Wikipedia. These tend to define villages as: ‘a settlement usually larger than a hamlet and smaller than a town’. Interestingly too, Wikipedia (http://en.wikipedia.org/wiki/Village) goes on to look at villages in different countries and areas of the world and, for England, says this:

> ‘From an English point of view, the village represents an ideal of England. Seen as being far from the bustle of modern life, it is quiet, harmonious, if a little inward-looking’.

Is it perhaps any wonder then that there isn’t an accepted and widely used definition of a ‘retirement village’ let alone a ‘new’ retirement village? If you look at aerial images of some of the English retirement villages and retirement communities that we and colleagues know and have done work in (see for example, Bradeley Retirement Village, Stoke-on-Trent; Berryhill Retirement Village, Stoke-on-Trent; Hartrigg Oaks, New Earswick, North Yorkshire;
Westbury Fields Retirement Village, Bristol; Denham Garden Village, Buckinghamshire; and Whiteley Village, Surrey), then it is clear that hardly any of them truly fit these definitions of a ‘village’. They are morphologically very different and their locations vary from rural to suburban to urban.

The Evidence Base

Partly because definitional issues are complex and unresolved I draw on - in the remainder of this presentation - a range of research which has been taking place in a UK context. Whilst some of it, including our own, has been focussed specifically on retirement villages, I also draw on wider work on extra-care developments and on other models of housing with care (see for example: Bernard et al., 2004, 2007; Callaghan, 2008; Croucher et al., 2003, 2006, 2007; Darton et al., 2008; Evans and Means, 2007; Evans and Vallelly, 2007; Peace and Holland, 2001; Peace et al., 2005; Tinker et al., 2007; Vallelly et al., 2006).

In addition, it is worth just noting that there are elements of the sustainability debate and literature that dovetail very closely with the orientations of those of us who work within what we like to call a critical gerontological approach. Whilst ‘sustainability’ is still a contested and much debated concept, historically, it has its roots in the 1960s’ environmental movement (Dresner, 2002). Sustainability and sustainable development then came fully onto the political agenda in the late 1980s when the United Nations’ World Commission on Environment and Development published its report entitled *Our Common Future*. This was designed to create an international agenda around how best to protect the global environment whilst, at the same time, sustaining and expanding the world’s environmental resource base. In what has become an oft-quoted and very well known phrase, the report defined sustainable development as activity that ‘meets the needs of the present without compromising the ability of future generations to meet their needs’ (WCED, 1987: 8). Interestingly for us, sustainability in these terms is both about equity between generations and equity within generations - notions that resonate very closely, I would suggest, with some of critical gerontology’s concerns - but which throw up challenging issues in terms of looking at age-segregated retirement villages.

The second element of the sustainability movement which links especially closely with our concerns is its communitarian basis. This approach overtly links sustainable environments with issues about liveability, about human interaction and human relationships (Portney, 2003). In other words, it is about how individual people are affected by the environments in which they live (and work) and what we can do to create and enhance the community aspects. So - this approach to sustainability looks beyond issues relating just to the physical environment, and would consider a wide range of social issues such as whether and to what extent people participate in civic and political activities; the extent to which there is social and economic equality; or how diversity is accommodated and treated (Williams et al., 2000). Essentially, this approach places great importance on how civil society functions or not.
Again, I would suggest that this resonates very closely with our concerns about new retirement villages and leads me now to consider the evidence base around the first of my questions:

- Are new retirement villages sustainable?

**Sustainability: Environment and Design Issues**

Here, I look principally at what retirement villages are like as 'built environments' and whether or not they are being built to last. The design aspects have been described in the sustainability literature as ‘the hardware’ of sustainability. One aspect of sustainability is about building durability and, in design terms, the move now is towards designing to Lifetime Homes Standards. The Lifetime Homes movement was launched originally by the Joseph Rowntree Foundation in 1989 (Hanson, 2001; Kelly, 2001) and is about designing homes that adapt to changing needs over the life course and which have certain space, accessibility and energy efficiency standards (see slide).

Many of the newer retirement villages are designed to Lifetime Homes Standards. In addition, in recent years a number of Housing Associations and developers have gone on to produce their own design guidance and ‘barrier free’ housing policies and the expectation is that the more this becomes standard practice, the less we will think about these features as somehow special. In addition, the work of Anthea Tinker, Julienne Hanson and colleagues (2007) suggests that in terms of future proofing:

‘A remodelled building should be future proofed for at least a 30 year design life. This should include a high specification for finishes, fixtures and fittings so as to avoid premature renewal as a consequence of having skimmed on the initial cost of construction. There is also a need to take account of older people’s changing aspirations in this respect.’

However, whilst Lifetime Homes Standards are an important element of the move towards more inclusive design, they are not in/of themselves necessarily ‘green’ or sustainable in terms of use of technology, the wider environment and the use or re-use of local materials. Consequently, any consideration of whether or not retirement villages are environmentally sustainable would also need to consider, for example:

- What use is made of pre-existing dwellings or are they just demolished and removed?
- What materials are being used in the construction of these communities and whether they are, and can be, recycled?
- How efficiently the land is being used eg site contouring to optimise use of storm water and reduce run-off.
• Minimising the needless destruction of trees/re-locating trees etc.
• Water efficiencies and possible recycling plants.
• Energy efficiencies such as insulation, window efficiencies etc.
• Safe streets/lighting.

In addition, the sustainability literature talks about what is sometimes referred to as the ‘software’ of sustainability’. This could include looking at things like the extent to which these communities have some/all of the following:

• Common meals
• Growing your own/organic produce
• Ride-sharing schemes
• Communal transport provision/shop-provided transport
• Waste recycling
• Shared vehicle ownership
• Shared tools/equipment (eg. computers; garden tools; washing machines)
• Collective celebrations
• Collective activities/outing

The Evidence

We have accumulating case study evidence of environmental sustainability as it relates to cities and urban and rural developments like Eco villages but, to date, we have very little empirical research on any of the above in connection with retirement villages. There is some (again case study) evidence from the development of co-housing in other countries - notably North America and Europe - but the philosophical basis of such developments may be very different to that of retirement village developers.

However, from the research currently taking place in the UK, there are indications that, on the whole, residents are very satisfied with these new villages and communities in terms of the general design and layout of the schemes, the buildings and their individual accommodation. Despite this general satisfaction, certain design and locational features can be problematic and create physical barriers. At scheme level, Croucher et al.’s (2007) comparative study showed that the locations of some schemes meant that people felt stranded ‘in here’, although some relished being away from ‘all that madness out there’. At Westbury Fields Retirement Village (Evans and Means, 2007), planning restrictions meant that they had to retain the original cricket pitch in middle of village which now forms a physical barrier between the very sheltered housing to the south-east and most of the lease purchase apartments to the north-west (plus the care home):
I think it’s in two distinct sections which is a pity. We are very cut off from the other side and it would be easy to become “we” and “they”.

Shared buildings and shared facilities with the wider community are both a resource for the wider community (Croucher et al., 2007) and may be a way of raising additional income to help sustain the viability of facilities. However, this also raises tensions over ‘ownership’ on the part of residents who may feel that having ‘outsiders’ come in compromises security. One response to this is the development of ‘progressive privacy’ whereby, for example, facilities are accessible to the wider community on lower floors but with access to upper floors (ie. apartments) restricted. This was certainly the case in Berryhill (Bernard et al., 2004) and is also evident in Denham Garden Village.

Despite the implementation of lifetime homes standards in terms of design, certain features remain problematic. In Berryhill for example, doors along corridors (internal streets) and front doors, were sometimes too heavy to manipulate effectively if you were in a wheelchair and the layout of ‘streets’ could be disorienting for people - especially those with dementia or other mental health issues (Bernard et al., 2004). Certain problems are also evident with some public spaces. Again, in Berryhill, the acoustics in public spaces such as the village hall, restaurant and bar, were sometimes difficult for those with hearing problems as this resident observed:

Margaret: Mary is - she can’t communicate unless it’s one-to-one because she can’t hear because of background noise - she can’t join in much at all.

In Denham, one of the architects felt that the winter garden doesn’t work well: inadequate heating and ventilation mean it is often too cold in winter; windy when doors slide open automatically; and sometimes too hot in summer. One consequence of this is that it is not used as the planned communal/circulation/meeting space. Contrast this with Westbury Fields and the main building called Sommerville. This is both the sheltered housing complex and the main village reception area, with a restaurant, a lounge and the gym. Here, there is a large glass atrium running along the front like an indoor street (similar to continental developments) – with café style tables and chairs, lampposts and facilities for activities like chess, boules, bowling and snooker: a design feature valued by residents (Evans and Means, 2007).

In terms of individual dwellings, some of the accommodation in existing schemes (both old and very new) is very small. In Croucher et al.’s (2007) study, residents’ main complaint was how their daily lives and activities, and sense of personal identity, were highly constrained by a general lack of living space, although others had adjusted to smaller spaces. Below a resident explains her feelings on first being shown a flat in her scheme:

Margaret: Mary is - she can’t communicate unless it’s one-to-one because she can’t hear because of background noise - she can’t join in much at all.
They took us into one the flats that was for a disabled person, and for me it was a culture shock. There were about ten of us, crowded into this small room, cos they vary in size the flats, and I saw this little flat, it was furnished, and I thought my god where do I put my vacuum cleaner, where do I put my furniture, that was such a … I was numb, absolutely numb. I couldn’t get away quick enough, I really couldn’t. I made some excuse, and said I had to leave. I was really upset.
[Interview with resident, Hawthorne House].

In Berryhill too it was difficult to entertain visitors and continue patterns of family-orientated activities (e.g. cooking Sunday lunch) as there simply was not enough room to cook a meal for a number of people, or have a dining-room table and/or sufficient chairs for more than two people to sit down (Bernard et al., 2004).

Again, this can be contrasted with a Westbury Fields’ lease purchaser (Evans and Means, 2007) who observed:

One of the things that attracted me to this flat was the fact that the kitchen is big enough for eating… the bedroom’s the biggest we’ve ever had. The kitchen’s the biggest we’ve had and the spare bedroom, as we call it, is bigger than the smallest bedroom I had in my semi…
[R26, lease purchase]

If space for living (or ‘liveability’ in the sustainability literature), not just for functioning, is a design issue, then size is but one aspect. Lack of storage space is emerging as a concern across a number of studies, making it hard for people to maintain hobbies and interests, to keep clothes tidy, or to store household appliances, tools, books or craft/study materials. Interestingly, the Lifetimes Homes criteria make no reference to storage space.

Similarly, it is other small design details that can cause both frustration and annoyance. In Croucher et al.’s (2007) comparative study, fiddly window catches and locks, cupboards that were difficult to access, the location of electrical sockets, heating controls, centralised heating systems, the location of meters, the height of kitchen cupboards and so forth, were all identified as problematic. The heating system in Berryhill was also problematic for some residents, as was the lack of soundproofing between flats (especially where residents were hard of hearing and needed to have televisions or radios turned up loudly) (Bernard et al., 2004). In Westbury Fields, problems with ground floor windows, climbing up to reach cupboards, and inaccessible controls, were also mentioned (Evans and Means, 2007):

The cooking facilities in the kitchen are ridiculous because they’ve put ovens in there that you can’t reach. Unless you’re tall and straight, you can’t see the dials because they’re too high… I’ve never used that oven yet.
[R15, lease purchase]
In Hartrigg Oaks (Croucher et al., 2003), a lack of interesting views from windows was also an issue, especially if residents had restricted mobility.

Set against this, it is evident across all recent studies that the design features most valued by residents of these communities include garden spaces, patios and balconies. In other words, having easy access to outdoor space and/or balconies is very important. Communal gardens too are especially valued. Likewise, within schemes, spaces where people can meet and also encounter each other informally are important as this resident of one of the bungalows in Hartrigg Oaks (Croucher et al., 2003) explains:

[In the coffee shop] … We met people, people said ‘oh hello, have you just moved in and how’s this and how’s that’, and you got all their stories about moving in and we knew an enormous amount of people in about a fortnight.

Designing in social spaces is linked with – and leads to – my second question which asks:

- Are new retirement villages sustaining?

**Sustainability: Social and Community Issues**

Here I consider some of the existing research evidence around how retirement villages do or don’t function as particular societies or communities, and whether they are indeed sustaining for those who live (and work) in them. I concentrate here on residents rather than staff and ask whether these communities are sustaining:

- At times of crisis, illness or loss?
- In terms of well being?
- Civically?
- Socially?

**Deteriorating health, illness** and/or the health status of a partner is often a prime motivator for people moving to these kinds of environments as much of the recent research demonstrates (Bernard et al., 2004; Croucher et al., 2007; Evans and Means, 2007). By contrast, in Hartrigg Oaks, it was ‘anticipation’ of deterioration in health rather than health status per se that was the prime motivator (Croucher et al., 2003). Moving to these communities was also often the only option for couples who wished to remain together where one was unwell. Existing studies all seem to show that, particularly at times of illness or in the event of a crisis, these places are sustaining in the sense that they both remove the worry of anticipating that something might happen to you and, if and when it does, being assured that there are others on hand to help and support you. Here are two Berryhill residents (Bernard et al., 2004) talking about these aspects:
Angela: My health has been better since I’ve been in here because I haven’t got the worry of being on my own if I’m ill and who is going to find me?

Georgina: When I had falls in my other house, I used to have a lifeline. They had to shout and come in over the intercom to ask you if you were bleeding first. Then they had to ring my daughter, and she can’t drive now because of her back. She had to get her husband off work to come up and see me…. When I fell in here, they were there in a few minutes.

Crucially too, our work in Berryhill showed that at times of loss and bereavement it was the close proximity of friends that enabled people to cope and which saw them through and sustained them during these difficult times. You can’t get away from the fact that in environments like these there is a heightened visibility and intensity around death. As Alice, one of our respondents in Berryhill succinctly put it: ‘You see the problem here is when somebody dies we all know.’

But whilst death might be more visible, there is also support as these two friends explain:

Maura: I don’t think I could have coped on my own. But because I was in here, and I had got Kathleen next door to me who came into me every day, and loads of other people, I had a lot of support.

Kathleen: I think also when it happens to you, you know what it’s like: you know what other people are going through.

Despite high proportions of residents having long-term health conditions, large majorities generally report good health and good quality of life in these places. Our initial retirement community work in Broadway Gardens in Wolverhampton, which compared the residents with a community-based sample, showed that people also maintained their levels of functioning over a period of two years while people in the outside community deteriorated (Kingston et al., 2001).

People also talk about well being in terms of the atmosphere and ethos of these environments. Here for example is Bea, another Berryhill resident, who told us:

If I’d got to get a bus to town to go to aerobics, I wouldn’t dream of it. I come down here and quit enjoy it. Some days you think, ‘Oh I don’t think I can cope today, I’m not feeling too good’, but you come down and you feel so much better for it.

Well being is also about psychological and physical security and many residents talk in the kinds of terms that George - another of our Berryhill respondents - does about feeling safe and feeling secure:
I think I’m more relaxed here than out there: I’ve got no pressures in here as I had there. I was worrying about whether the house was big enough to carry on, "Where are we going to go?" you know, "What is going to happen to her? Are we going to be split up?", and things like that. But here we won’t, so we can get on with living. It has taken a lot of pressure off.

Perhaps above all, well being is linked to feelings about autonomy and, across many of the existing studies one can find very similar quotations from residents about liking privacy but having company available if and when one wants it.

In terms of communitarian ideals though, one of the key things for these kinds of developments is the balance between this ability to be private and independent, and the perhaps often unspoken emphasis on taking part and getting involved. In Berryhill, an element of fulfilling one’s civic duty was evident in the drive towards getting people to volunteer. As the ExtraCare Charitable Trust developed its retirement villages, it also recruited volunteers who they called ambassadors. Here’s Alice again, describing what they do:

In here, when you say ambassador, you mean someone who explains when visitors come round…you’re not under pressure to, ‘You mustn’t tell them this’, and ‘You mustn’t tell them that’ – you’re free to tell them: you’re free to answer their questions from your own point of view.

If volunteering is one aspect of community and civic life, then the opportunity to participate in shared decision-making is another. Again, many of these developments have residents’ forums or groups of one kind or another. However, having a voice isn’t just about voicing complaints, it is also about taking responsibility for things and being prepared to acknowledge when things are done well. Staff at Berryhill - and I suspect elsewhere too - could sometimes feel ambivalent about this because, providing opportunities for people to participate, meant that residents were then more likely to be challenging and keep staff on their toes. As individual staff, and indeed as organisations, they had to learn how to deal with this and be mature enough to accommodate and accept criticism where warranted.

Perhaps one of the clearest areas where the research shows that these environments are sustaining is when we look at this from a social point of view: in terms of social activities, friendships and social networks. A wide range of research shows how important social support is to people’s functioning in later life and our studies of retirement communities and those of our colleagues - demonstrate that there are many dimensions to this, including the opportunities these places afford to develop friendship networks; to participate in a wide range of activities; and just generally be sociable with people of varying ages. Here are three women from Berryhill (Bernard et al., 2004) talking about the importance of activities:

Maura: Yes. It's the activities in a place like this that keep them going, keep them young, because there's always something to do.
Beth: Oh no, you couldn't do it outside. We would be like cabbages if we didn't do something. We would be just like a cabbage and lose interest in everything.

Patricia: Here you are sort of going out but you haven't got to go outside the building have you? You come down for entertainment. It's like you are going out but you haven't got to go out in the cold or a taxi and you're alright.

And here is another woman from Evans and Valletly's (2007) study of social well being in Extra Care housing, talking about sociability:

We are all very friendly, we all speak to one another. Yes I would say we are, even if we don't have a lot to say or a lot in common, it's only politeness to say hello in my view.

[Female tenant 050]

Friendships and networks can also transcend ages and generations in these environments as Alice (Bernard et al., 2004) observes:

I've been in here two years... until he [another resident] had a birthday a few months ago we were on a level. He had a party and it was his 65th birthday. I'm old enough to be his mother! But when you're together, you're the same age.

But, perhaps the ways in which these environments are sustaining is best summed up by Rachel: another Berryhill resident:

My life was pretty restricted before I came in because I had a sick husband, we didn't get to go out, not that I'm grumbling. But now I go to the theatre, I paint, we have friends we talk to in a morning, we have entertainment - not every day - and I seem to have a more open life now.

Lest you think I'm painting an overly rosy picture of just how sustaining these places can be, let me now turn - as we get towards the end - to some of the (potential) drawbacks to these environments. Here I look briefly at three areas:

- Social isolation and loneliness
- Social exclusion
- Generational differences
From Berryhill and now from Denham, we have evidence of **social isolation and loneliness**. In Denham, about 60% of respondents to our questionnaire report being moderately lonely, although high proportions (about 85%) have friends in the village. Similar findings were evident in Berryhill and from Croucher et al’s (2007) comparative study which showed that many people said they were lonely, particularly those who had lost their partners:

> I am as happy as I can be, there is the problem of loneliness, undoubtedly there is the problem of loneliness. The evenings are very long.
> [Interview with resident, Sycamore Court]

Social isolation was also a particular difficulty for frail residents in many of the studies recently completed and currently underway (Croucher et al., 2006; Evans and Means, 2007).

Moreover, some residents and tenants in these communities are also at particular risk of **social exclusion** especially, again, people who have impaired mobility and/or reduced cognitive function. Here is Tilly talking about her situation (Bernard et al., 2004):

> The only people I've seen since I've been here is the cleaners… nobody knows. I am living on my own most of the time because I can't walk. Physically it is my balance. You see I'm not safe now because I lose my balance. So I am more or less tied to my flat… I do [come to the street meetings] but I have to be fetched and taken down.

In Hartrigg Oaks (Croucher et al., 2003) and in Berryhill (Bernard et al., 2004), some residents also talked about the formation of cliques. In places of this size, it is perhaps not surprising that groups and sub-groups form but, intentionally or not, other residents can be excluded, especially when some groups colonise particular spaces and places within the village and monopolise facilities. Whilst this kind of exclusion is reflected in the way space is used, here is Doug (at Berryhill) talking about exclusion based on false assumptions of people’s capabilities:

> Some people seem to think that because you’re in a wheelchair, you’ve gone up there [pointing to head], you know, and you haven’t. A lot of people are very active up in their mind. Because the body doesn’t work it doesn’t mean to say that your mind’s not working. But that’s what you get, I’ve noticed that. They can be very hurtful at times can’t they?... Being ‘wheelchair friendly’ doesn’t mean what it says: it’s not all for the buildings – a lot more people need to be wheelchair friendly as well, I think. It needs some education, I think.

Many of the existing studies also show the gendered nature of these environments and how men, in particular, may be reluctant to join certain groups or activities - especially if they are the only man there. From a woman’s perspective, being in the majority doesn’t appear to be a difficulty, except for some activities like dancing where there are never enough male
partners. Sexuality though is another matter and one which we know very little about in the context of preferences for housing and care in later life. In Croucher et al’s (2007) comparative study, one participant disclosed that he was gay to the research team and although he had been cautious about coming out, he felt that those residents he had taken into his confidence had in fact been very accepting.

Lastly, notwithstanding what I said above about some people feeling that age and generation doesn’t matter in these environments, others feel that there are indeed differences. In Berryhill, these differences manifested themselves in terms of activities like dancing and music. Here’s Doug again talking about dancing, and Nora about musical tastes:

_We were on about the dancing. They said, ‘Why aren’t you dancing?’ I said, ‘Well I don’t know what dancing you’re doing because I was in the sixties’. We had the jive and the twist and they’re doing ballroom things. I don’t know anything about it._

_Different music, that’s the biggest one, the music. You get the young ones, the middle ones and the older ones. The older ones want the old music, the middle ones want middle-of-the-road music and the younger ones want young music._

This brief overview of some of the evidence about sustainability and the development of new retirement villages leads me, penultimately, into looking at the challenges for existing and future research about these environments.

**Challenges for Research**

Here I comment on four areas:

- Theoretically informed research
- Access to research sites
- Research topics/areas
- Methods and methodological issues

So far, I have said nothing really about theory but, behind a lot of what I have said lurk questions about possible theoretical approaches we might take to studying and researching new retirement villages. This could range from looking at these environments through the lens of traditional social theories such as disengagement theory or activity theory; through to more radical social theories or even the kinds of Malthusian or ecological theories employed by some colleagues working in the sustainability field. Currently, much work in this area - our own included - hasn’t adopted very overt or clearly articulated theoretical frameworks for looking at these environments. On the other hand, you could perhaps argue that by moving on from descriptive evaluations and case study research to asking difficult policy-related questions, we are, of necessity, taking particular theoretical stances towards the evidence we are accumulating.
For example, in physical and economic terms, we could take the view that, at the cornucopian end of the theoretical spectrum, developing retirement villages makes sense: they give people choice and opportunity. Moreover, in a growing western economy we produce enough surplus to ‘look after’ older people in these kinds of environments as and when they need it; young migrant workers will in all likelihood meet the labour needs; and why shouldn’t older people have a life of leisure in their later years?

However, as I have tried to show, the social and emotional aspects might make less sense: in whose interest is it to have older citizens living in age-segregated villages, however ‘sustainable’? What do the residents of such villages lose, and what does the rest of society lose (grandparents, great uncles, experienced workers, volunteers living adjacent to areas of volunteering need, etc)? We might have a limited ‘bricks and mortar sustainability’, but does the rapid expansion of these environments make sense in broader social and anthropological terms?

In terms of access to research sites, and despite the evidence I have drawn on, I would argue that we are really only just beginning to scratch the surface of what it might be like to live - and indeed work - in these retirement developments and villages. Between 1999, when Anthea Tinker and colleagues wrote and presented their in-depth report on the funding of long term care to the Royal Commission, and 2006 when Karen Croucher and colleagues produced their literature review on Housing with Care for Later Life - there were only 11 UK papers reporting primary research and evaluation studies of housing with care schemes - and only two of these - our own study of Berryhill (2004) and Croucher et al’s (2003) study of Hartrigg Oaks - were specifically looking at larger retirement villages. Whilst some developers like the ExtraCare Charitable Trust, the Joseph Rowntree Housing Trust, the St Monica Trust and Anchor Trust, have been open and generous in both funding research and letting us researchers into these communities - we know very little, as yet, about private rather than charitable or RSL developments - and this is clearly an untapped area.

If you accept my contention that retirement villages are societies in miniature (albeit particular kinds of age-segregated societies) then, potentially, the topics or areas for future research are almost limitless. At the risk of simply producing a shopping list, from what I’ve already said there are still big gaps in our research evidence. I would argue that we probably know enough about what contributes to social well being in these environments, but we know much less about a range of other equally important issues including:

- Attitudes towards mixed dependency; mixing ‘fit’ and ‘frail’;
- Attitudes towards mixed tenure; and the implications for community cohesion and social inclusion;
- How the balance between environmental, economic and social sustainability might be achieved and sustained;
- Consumer attitudes to ‘trading down’ to retirement villages;
- Decision-making and conflict resolution strategies in these communities;
• Design and uses of space - inside and out;
• Dimensions of diversity; BME groups; generations; children; religion; class; income; sexuality, likes and expectations;
• Domiciliary versus on-site care facilities, payment for future care;
• End of life care;
• ‘Home for Life’, ‘ageing in place’ and exit criteria;
• The role of telecare; other assistive technologies and services;
• Working as well as living in these environments;
• Changes to all these things over time.

At the 2007 BSG conference, we were involved in a symposium on ‘Capturing daily life in retirement developments: methodological issues’. Professor Sheila Peace was the discussant and, amongst other questions, she asked importantly whether in our current studies crucial material needs to be comparative between projects? It seems to me that the use of some similar scales and tools is vital if we are to be able to compare findings coming from these studies in any meaningful way and if, in turn, they are to contribute further to policy and practice developments in the future.

A second crucial area for me is also implicit in what I have been saying. To date, the bulk of our evidence is cross-sectional. Although I know we always bemoan the lack of longitudinal studies, it would be fascinating and instructive to really look at how these new villages function over a timescale which is longer than just two or three years. What happens as new people come into these environments? Just how sustainable will the activities be? How will they sustain volunteer involvement? What will happen as residents grow older and, potentially, frailer - both physically and mentally? Our current work with Anchor Trust (which runs until June 2009) is laying the foundations for just such a longitudinal study and we are optimistic that, in due course, we will be embarking on work which will, potentially, enable us to look at Denham over a further 10 years.

In research terms then, there is much that can still be done. Although I have not had time today to consider policy and practice challenges in any great detail, there is one crucial policy-related research question I would like to pose, namely: might we in fact be expecting too much of these schemes/new developments in terms of being ‘all things to all people’? Although literature from around the world seems to suggest that people do actively choose to live in these environments I wonder if, like sheltered housing before it, they may be in danger of being seen as the solution - rather than just one option - to accommodating and caring for our ageing population.

I’ve said ‘our ageing population’ but I should really be directing that question at all of us and asking what forms of care and accommodation do we think we want as we get older? In early 2009, I become eligible to move into these kinds of villages so I want to conclude by asking you:
Is this the Future?

In thinking about our own old age, I wonder if anyone in the audience would like to live in one of the new UBRCs - or ‘University Based Retirement Communities’. Today, in the United States, there are reckoned to be approximately 50 retirement villages and retirement communities either on, or affiliated with, neighbouring University or college campuses - with another 50 or so in development. They have been variously described in the popular and promotional literature as ‘Retirement communities for the PhD set’; or billed in terms such as ‘Grandparents Are Returning to College, to Retire’; ‘Boomers on Campus’; or ‘Age at your alma mater’. One of the newest of these developments - due for completion in July 2009 - is Belmont Village Westwood in Los Angeles. The six-storey, 162-unit building is for retired faculty and staff of the University of California in Los Angeles, as well as for parents of current faculty and staff.
References


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**Resources**

Academy for Sustainable Communities  
[http://www.hcaacademy.co.uk/sustainable-communities](http://www.hcaacademy.co.uk/sustainable-communities)

Housing Learning and Improvement Network (LIN)  

Housing and Care for Older People Research Network  

Joseph Rowntree Foundation  
[http://www.jrf.org.uk](http://www.jrf.org.uk)

Longitudinal study of Ageing in a Retirement Community (LARC) – Keele University  
[http://www.keele.ac.uk/research/lcs/csg/larc](http://www.keele.ac.uk/research/lcs/csg/larc)

The Housing and Older People Development Group (HOPDEV)  