

Urban Transition: Here today, gone tomorrow?

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ABSTRACT

What happened to the dreary box styled office parks? Where is the dirty, rough and tough industrial precinct? When did an Airport become more than just a place to merely catch planes? What do you mean that is a Retirement Village and not an office tower?

This paper discusses observations of the way in which development has evolved throughout the property sector to constantly challenge the transition between traditional and evolutionary development. It will examine and provoke thought as to the transitional nature of different property sectors and its applicability to Retirement Villages as a platform for future development.

Office parks have evolved to become integrated business communities, industrial precincts embrace modern design that is cleaner, greener and more pleasing to the eye, Airports become an economic hub for development and Retirement Villages become more compact from large tracts of flat land on the urban fringe to vertical villages situated within the heart of it all.

The ability to transform the property market to satisfy evolving preferences and target markets represents a significant opportunity to tailor development to satisfy one of the most expansionary markets of today – Retirement.

This paper examines the design and lifestyle preferences of retirees and future retirees, in challenging the industry response to sustainable living alternatives that meet evolving living expectations for our urban places.

KEYWORDS: Retirement, Design for Living, Urban Environment, Transitional Property Development.

1. INTRODUCTION

Development within the property sector has continually evolved and challenged the transition between traditional and evolutionary development. Airports seemingly served one purpose, a place to merely catch planes and yet Airports are increasingly becoming an economic hub for development. Traditional office parks primarily consisted of office buildings, which typically excluded services and facilities for businesses and their employees. As such, office and business parks are no exception to urban transition with the advent of new developments taking shape as integrated business communities such as Norwest Business Park in North Ryde, Sydney, which incorporates a mix of retail, commercial, recreational, industrial and residential components. Industrial precincts have generally been aligned with dirty trucks, smoke stacks, hazardous materials etc. However, with increasing emphasis being placed on environmental awareness, new industrial estates and precincts are slowly adopting a clean and green image, emphasised by the modernity of its urban design façade.

Is this what urban transition is all about? Are such development transitions indicative of things to come across the gamut of the property sector? Do developments become so readily obsolete to make way for a new dawn of urban development and the adoption of more socially acceptable development? Such transitions in development have ultimately been a market response to an evolution of preferences and motivations in the way in which individuals live, work, and relax within the urban environment. The ability to transform the property market to satisfy evolving preferences and target markets represents a significant opportunity to tailor development to satisfy one of the most expansionary markets of today – Retirement. Retirement Villages are slowly beginning to experience such a transition. The notion of a Retirement Village being a “final resting place” is slowly subsiding, with a greater emphasis being placed on retirement “living”, embracing individual lifestyle choices.

This paper examines the design and lifestyle preferences of retirees and future retirees, in challenging the industry response to sustainable living alternatives that meet evolving living expectations for our urban places.

2. Retirement Living in Australia

2.1 Ageing in Australia

An ageing population is not an event that occurs in isolation nor is it confined to a certain town, city or country. However, some areas may experience a greater preponderance of an ageing population than others. The age cohort for retirement living is generally established as those aged 65 years and older. In particular, emphasis in retirement has been placed on the Baby Boomer generation (those individuals born between 1946 and 1961) as they near retirement age and whether there is sufficient health care service infrastructure to accommodate this increase.

In Australia, the proportion of persons aged 65 years and older has increased significantly over time, as illustrated in TABLE 1. In 1947, the proportion of persons aged 65 years and older was about 8.0%, marginally increasing to 8.3% in 1954, 8.5% in 1966 and 10.6% in 1986, representing an increase of 2.6 percentage points over this period (Australian Bureau of Statistics, 1976, 1981, 1986). A review of census data post 1986 illustrates that the proportion of persons aged 65 years and older has continued to increase at a greater rate than the period between 1947 and 1986. The results of the 1991 ABS Population and Household

Census, recorded the proportion of persons aged 65 years and older in Australia was 11.3%, increasing to 12.1% in 1996, 12.6% in 2001 and 13.3% in 2006 representing an increase of 2 percentage points over the corresponding period (Australian Bureau of Statistics, 1991, 2006). The increase in the 65 years and older age cohort has been more pronounced in the 15 year period between 1991 and 2006 than the period between 1947 and 1986, highlighting the demographic shift in Australia's population.

TABLE 1: Australia's Population by age cohort

Age	1947 (%)	1954 (%)	1961 (%)	1966 (%)	1971 (%)	1976 (%)	1981 (%)	1986 (%)	1991 (%)	1996 (%)	2001 (%)	2006 (%)
0-4	10.1	10.8	10.6	9.9	9.6	8.8	7.6	7.6	7.5	7.1	6.6	6.3
5-9	8.0	10.0	10.0	10.1	9.6	9.2	8.6	7.4	7.5	7.2	7.1	6.6
10-14	7.1	7.7	9.7	9.4	9.6	9.2	8.9	8.3	7.4	7.3	7.1	6.9
15-19	7.7	6.6	7.7	9.1	8.7	9.0	8.6	8.4	7.8	7.0	7.1	6.8
20-39	31.3	29.6	27.2	26.4	28.0	29.6	31.6	32.4	31.8	30.9	28.7	27.6
40-64	27.8	27.0	26.3	26.5	26.2	25.3	24.9	25.3	26.7	28.4	30.7	32.4
65+	8.0	8.3	8.5	8.5	8.3	8.9	9.8	10.6	11.3	12.1	12.6	13.3

Source: Australian Bureau of Statistics 1976, 1981, 1986, 1991, 2006

The demographic shift in Australia's population is expected to continue with the proportion of persons aged 65 years and older projected to comprise 17% of the nation's population in 2016, 21% in 2026, 24% in 2036 and 25% in 2046. In the short to medium term, the rate at which the proportion of persons aged 65 years and older is anticipated to continue to increase significantly before declining highlighting the increasing presence of early Baby Boomers entering retirement (Australian Bureau of Statistics, 2009).

In comparison, the proportion of persons aged 65 years and older has more than doubled in the Northern Territory, Australian Capital Territory and Tasmania between 1947 and 2006 as illustrated in TABLE 2. However, the Northern Territory and Australian Capital Territory comprise the lowest proportion of persons aged 65 years and older in comparison to other States, with South Australia and Tasmania comprising the highest proportion.

TABLE 2: Proportion of Persons aged 65 years and older by State

State	1947 (%)	1954 (%)	1961 (%)	1966 (%)	1971 (%)	1976 (%)	1981 (%)	1986 (%)	1991 (%)	1996 (%)	2001 (%)	2006 (%)
QLD	7.1	7.8	8.5	8.9	9.1	9.4	10.2	10.8	11.6	12.0	12.4	13.0
NSW	7.8	8.5	8.8	8.7	8.5	9.2	10.1	11.0	11.9	12.7	13.1	13.8
VIC	8.9	8.6	8.6	8.6	8.4	9.0	9.8	10.5	11.1	12.1	12.7	13.3
NT	2.9	2.7	2.5	.2	2.5	2.7	30	3.7	4.6	4.9	5.2	6.6
ACT	3.0	3.1	3.0	2.9	2.8	3.1	4.3	5.1	6.1	7.1	8.3	9.4
WA	8.1	7.4	7.5	7.6	7.4	7.9	8.7	9.3	9.8	10.5	11.2	12.1
SA	8.7	8.9	8.8	8.5	8.5	9.1	10.5	11.6	12.7	13.9	14.5	15.2
TAS	7.7	7.6	7.7	7.8	7.9	8.6	9.8	10.6	11.5	12.4	13.5	14.5

Source: Australian Bureau of Statistics 1976, 1981, 1986, 1991, 2006

With the continued increase in the proportion of persons aged 65 years and older expected to continue in the future, increased emphasis is being placed on the social implications for aged care services.

2.2 The Retirement Living Sector

It is pertinent to distinguish the difference between aged care and Retirement Villages, as these terms are quite often mistakenly used interchangeably. Aged care generally infers that some level of health care is required by an older individual and is generally perceived more as a collective choice of the individual and their family as means of ensuring care is available on hand and a diminished level of independence. More generally *“Aged care accommodation takes the form of nursing homes and hostels. The difference between the two depends upon the level of health related services provided in each. Nursing homes provide a high level of care and include dementia specific centres. Hostels provide low care services”* (Koumoukelis, 2009).

Conversely, Retirement Villages are more focused on sustaining individual independence as a part of a community, hence the composition of Retirement Villages primarily comprise of Independent Living Units. Koumoukelis’ (2009) review of the Retirement Villages Act by State jurisdiction highlighted that Retirement Villages are broadly defined across the jurisdictions to mean *“a complex containing residential premises that are predominantly or exclusively occupied by retired persons who have entered into village contracts with an operator of the complex”*. Some Retirement Villages may also include some form of aged care to a lesser extent to allow residents to transgress from Independent Living Units to aged care if and when required. Essentially it is important to note that Retirement Living does not necessitate that retiree’s need assistance.

Traditionally, Retirement Villages have comprised of low density residential, developed on large tracts of land towards the urban fringes, with limited facilities and a basic layout and design. With evolving lifestyle preferences and changing motivations, Retirement Villages are becoming a lifestyle fuelled by individual choice and preference. As such, the development of higher density residential Retirement Villages or more commonly referred to as “Vertical Villages” is slowly emerging. No longer is a Retirement Village development confined to traditional low density residential design and layout, nor does it necessarily adorn the title of a Retirement Village. Lifestyle resorts, 55+ villages, senior living etc. are all names synonymous with Retirement Living and are increasingly replacing the Retirement Village persona. Nevertheless, the concept of Retirement Living is becoming more appealing.

According to Peter McMullen of Jones Lang La Salle as at July 2007, there were some 1,700 Retirement Villages in Australia comprising about 106,000 units, with 560 villages located in New South Wales, 230 villages located in Queensland, and 230 villages in Victoria.

Interestingly, despite South Australia recording the highest proportion of persons aged 65 years and older (15.2%) at the time of the 2006 Census, South Australia comprised the least amount of retirement units in comparison to 33,900 units in New South Wales, 20,400 units in Queensland, and 22,950 units in Victoria (Mc Mullen, 2007). However, South Australia has the highest proportion of persons aged 65 years and older living within Retirement Villages as illustrated in TABLE 3.

TABLE 3: Proportion of Persons Living in a Retirement Village

State	Proportion living in a Retirement Village (2006)	Proportion of persons aged 65 years and older (2006)
South Australia	7.9%	15.2%
Western Australia	7.2%	12.1%
Queensland	5.5%	13.0%
New South Wales	4.9%	13.8%
Australian Capital Territory	4.9%	9.4%
Victoria	4.5%	13.3%
Tasmania	2.5%	14.5%
AUSTRALIA	5.25%	13.3%

Source: McMullen 2007, Australian Bureau of Statistics 2006

Although Tasmania comprised a greater proportion of persons aged 65 years and older (14.5%) than Queensland (13.0%), New South Wales (13.8%) and Victoria (13.3%) as at the 2006 Census, the proportion of persons residing in a Retirement Village is significantly lower in comparison.

With an increasing acceptance of retirement living and a continued ageing of the population, the proportion of persons aged 65 years and older residing in a Retirement Village could increase to a rate of about 7.5-8% over the next 15 years in Australia (McMullen, Sam 2008).

2.3 Attitudes towards Retirement Living

The concept of Retirement Living is nothing new, however, the way in which it is undertaken has evolved and is constantly challenging the Retirement Village sector as a result of changes in attitudes and preferences.

Research presented at the Property Council of Australia's Age of Aquarius Conference in 2007 by Professor Andrew Beer of Flinders University, highlighted the social and attitudinal drivers observed within Retirement Living. There has been a societal shift in the view of older generations, with Baby Boomers now entering retirement age considered to have greater levels of consumption, a focus on the neighbourhood environment, community cohesion and the realisation that there is not a single retirement market. As such, a range of retirement products will need to be provided to cater for a range of preferences and lifestyle choices. Beer's research also highlights the on-going desire for retirees to age in place, however, this does not necessitate that this occurs in one place but over a number of places. Today's retirees are considered to be more willing to consider retirement living alternatives such as high density apartments, residential parks and lifestyle resorts etc (Beer 2007).

Retirement Living is essentially governed by a combination of lifestyle choices, motivations and preferences. This may include a number of "push" and "pull" factors, which effectively determine an individual's retirement living options as to a Retirement Village or Aged Care facility. Push factors may include a desire for a change in lifestyle, maintenance, social isolation, health and mobility, while pull factors include built environment and affordability, maintaining existing lifestyle and location as illustrated in TABLE 4 (Stimson, McCrea, Star, 2002).

TABLE 4: Push and Pull Factors for Retirement Living (Self Care)

Push Factors	Pull Factors
<u>Change of Lifestyle</u> <ul style="list-style-type: none"> - more free time - more time with other people - change the ways they live and do things 	<u>Built environment and affordability</u> <ul style="list-style-type: none"> - size, design, staff (respect)
<u>Maintenance</u> <ul style="list-style-type: none"> - difficulty in maintaining home and garden - wanting a smaller place - more free time - children and family left home - 	<u>Maintaining existing lifestyle</u> <ul style="list-style-type: none"> - close to family and friends - close to existing services - being a local
<u>Social Isolation</u> <ul style="list-style-type: none"> - death of spouse - being lonely - want to spend more time with people 	<u>Location</u> <ul style="list-style-type: none"> - access to public transport - proximity to recreational facilities - climate of the area - attraction to the area ‘been there on holidays’ proximity to the coast and water
<u>Health and Mobility</u> <ul style="list-style-type: none"> - deteriorating health - need for assistance (part care) - not being able to drive 	

Source: *Stimson, McCrea, Star 2002*

The core “push” and “pull” factors present a significant opportunity for developers to successfully design a Retirement Village that reflects the motivations and preferences of individuals who choose to reside in a Retirement Village.

As the Baby Boomer generation nears retirement age, it is pertinent account for their preferences. It is considered this generation has greater levels of consumption and an increased notion on the ability to enjoy their ‘second teenage years’ whilst maintaining a focus on the neighbourhood environment. The ability for retirees to maintain their social cohesion within the broader community is important (Beer, 2007). For the Baby Boomer generation there is a greater precedence to sustain independence for as long as possible.

As a result of the willingness to maintain independence, there has been an increased emphasis placed on active retirees. As such, there has been an increasing presence of recreational and community facilities provided within newer retirement villages, coupled with the overall design, layout and external façade. TABLE 4 summarises the proportion of retirement villages comprising community and recreational facilities as highlighted by research undertaken by Jones Lang La Salle (Mc Mullen, 2007).

TABLE 4: Proportion of Retirement Villages with Community/Recreational Facilities by Facility Types (Australia 2007)

Community/Recreational Facility	Proportion of Retirement Villages
Bowling Green	23%
Swimming Pool	22%
Tennis Courts	4%
Boat and Caravan Storage	6%

Source: Mc Mullen 2007

Whilst Retirement Villages have traditionally focused on low density designs, there has been an emergence of higher density villages or “Vertical Villages” particularly in more populated areas such as Sydney. Such development has occurred as infill development within the existing urban footprint and concentrated in areas with close proximity to services and facilities.

The development of higher density villages has placed an increased emphasis on lifestyle as opposed to Retirement. For example, Lifestyle Manor in Bondi is a medium rise lifestyle village located in the heart of Bondi, Sydney. It includes a cinema, swimming pool, library, beauty room, hair salon and communal lounge. The manor comprises a mix of studio, two and three bedroom apartments. The layout and design of the manor makes it difficult to differentiate between a lifestyle village and a typical multi-residential apartment block.

Another example is Waterbrook Greenwich, in Sydney’s lower North Shore, which comprises a mix of two, three and penthouse apartments. Facilities include a full-time concierge, restaurant, hair and beauty salon, gymnasium, cinema, indoor heated pool and spa, craft room, woodworking room, putting green and bowling green. Marketed as a lifestyle resort, Waterbrook Greenwich, focuses on Retirement Living tailored towards a maintaining independence and activeness.

Nevertheless, greater emphasis will be placed on the ability of Retirement Villages to provide a range of services and facilities as well as being located proximate to alternative services such as public transport, health services, community services, shopping opportunities and other support services (Beer, 2007). The development of higher density villages is expected to continue within urban areas as a result of land constraints and increasing legislative requirements by local councils.

2.4 Retirement Living for the Generations

The process of urban transition within the Retirement Village sector as a result of evolving lifestyle choices and preferences is best reflected in the generational shift between the Builder Generation (those individuals born between 1925 and 1946), the Baby Boomer Generation, and Generation Y (those individuals born between early 1980’s and the mid-1990’s).

The Builder Generation inadvertently had limited choices for Retirement Living. Consequently, the Builder Generation generally “accepted” their Retirement Living arrangements although these were construed to the negative connotations of a “final resting place”. The concept of moving into a Retirement Village for this generation was somewhat a social expectation.

In contrast, the Baby Boomer Generation have a plethora of Retirement Living options available to them – Retirement Village, grey nomad lifestyle, lifestyle resort, manufactured homes, service apartments, villas etc. The development of higher density Retirement Villages reflects the Baby Boomer trend of enjoying life, maintaining their independence and living in the heart of it all through inner city living. While the Retirement Village Sector is currently experiencing a shift in development trends from traditional low density to higher density developments as result of such generational changes in lifestyle preferences and motivations, it does suggest that such a transition may also occur when the tech-savvy Generation Y near retirement. Perhaps Retirement Living for this generation will comprise of an online retirement community through facebook or twitter, or maybe Retirement will be last years phase and simply be a thing of the past. For Generation Y, there maybe a desire to maintain the active adventurous lifestyle they have become accustomed to.

Either way, acknowledging the reasons as to why people choose to live in a Retirement Village provide the basis for successfully responding to the market, however, caution still needs to be ensured the product effectively caters to the target market.

3. CONCLUSIONS

The research reviewed in this paper has highlighted the growing trend towards the development of Retirement Villages that are more user-friendly and focused on maintaining individual independence of the active retiree. Retirement Villages are becoming a more acceptable form of living for older generations with these generations become more adaptable to their lifestyle choices.

With evolving preferences, motivations and awareness within the Retirement Living sector it is pertinent to consider the implications for future Retirement Village development. Whilst there is a general consensus as to the preferences and motivations of retirees, it is pertinent to note that this may be somewhat restricted to the targeting of more affluent retirees and as such result in more upmarket retirement villages. Although, not discussed within this paper the issue of affordability will still need to be addressed within the Retirement Village sector.

Essentially, like many other property sectors the Retirement Village sector is entering a period of transition with evolving attitudes, preferences and motivations, as well as design, layout and the facilities and services provided within newer developments. With the proportion of persons living in a Retirement Village estimated to increase to about 7.5-8% in the next 15 years (McMullen, Sam 2008), the Retirement Living sector will need to sufficiently and adequately provide accommodation that satisfies evolving retirement preferences and target markets. The industry response to an ageing population, evolving lifestyle preferences and increasing acceptance of Retirement Living will effectively challenge the industry response to such growth and the future of the Retirement Village sector.

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