

Making the case for retirement villages

There has been a growing policy emphasis on promoting independence for older people, offering them choices, and improving their quality of life. Retirement villages appear to serve current policy agendas very well. They offer purposefully designed barrier-free housing with its associated autonomy, a range of facilities and activities that are not care related which generate opportunities for informal and formal social activity and engagement, alongside a range of care and support services that can respond quickly and flexibly to a range of care needs over time. Drawing on previously published studies and data from an on-going comparative evaluation of seven different housing with care schemes for older people, research by Karen Croucher finds:

- Evidence shows very clearly that older people see retirement villages as a positive choice. They are particularly attracted by the combination of independence and security, as well as opportunities for social engagement and an active life.
- The size of retirement villages (i.e. more than 100 dwellings) allows certain economies of scale and the development of facilities and care services that would not be viable in smaller developments.
- Mixed-tenure developments may be one way of extending the accessibility of schemes to older people with a wide range of levels and types of income.
- Affordability may be an issue for those who are self-funding their own care. Offering older homeowners opportunities to rent their homes may allow some to release their housing equity to assist with paying for care services.
- Retirement villages play an important role in promoting health and well-being among older people. Flexible on-site care services can assist residents as their care needs change, and may promote early hospital discharge and reduce the need for hospital admission.
- Retirement villages can help address the current shortage of homes suitable for later life, by developing housing that is purposefully designed to meet the current and future housing needs of older people, as well as releasing significant numbers of under-occupied properties for use by the wider community.
- Retirement villages also provide employment opportunities for the wider community, and increase the viability of local services and facilities.



Retirement villages

Retirement villages are a relatively new development in the UK, and there are as yet relatively few examples – including Hartrigg Oaks operated by the Joseph Rowntree Housing Trust (JRHT), Berryhill, and Ryefield Village both operated by the Extra Care Charitable Trust. Retirement villages usually have more than 100 units of accommodation, and offer high levels of care and support in environments that maintain and promote independence with the additional benefits of range of social and leisure activities. The model appears to be attractive to older people from a range of different socio-economic backgrounds. This *Findings* draws on previously published studies and data from an on-going comparative evaluation of seven different housing with care schemes for older people to explore five main themes:

- enhancing older people's choices for independent living;
- economies of scale;
- accessibility and affordability of retirement villages;
- health impacts of retirement communities;
- impacts on local communities.

Enhancing older people's choice for independent living

Evidence from Hartrigg Oaks and Berryhill shows very clearly that retirement villages are seen by older people as a positive choice, offering them an attractive combination of independence and security, as well as opportunities for social engagement and an active life (Croucher et al., 2003; Bernard et al., 2004; Croucher et al., 2006).

Independence is associated with having your own private living accommodation, and choices about how you spend your time. Concepts of security are complex, covering a range of domains including care, home maintenance, advice and advocacy, security of tenure, living in a barrier-free environment, and a reduced risk of being a victim of crime or harassment. Retirement villages are seen by residents as places to live as opposed to 'care settings'.

Economies of scale

The size of retirement villages (i.e. more than 100 dwellings) allows certain economies of scale, and the development of facilities and care services that would not be viable in smaller developments. Amenities that are not directly care-related (such as cafés, fitness centres, crafts rooms) provide opportunities for leisure, education, health promotion and social activities, and informal social encounters. Such facilities may also offer opportunities for income generation. In a larger development it is easier to plan care services and have a stable core of staff that can respond flexibly to changes in care needs.

Accessibility and affordability of retirement villages

A key question for retirement villages is how to make them accessible to people with a range of financial resources. Schemes that offer properties to buy and to rent may be one way of extending access to people with different levels and types of income. Other types of tenure, for example, shared ownership are also being tested. Evidence suggests that some older people are willing to forgo home-ownership, partly to release the equity in their homes, but also because the costs and responsibilities of home-ownership have become onerous. All the schemes in the comparative study – whatever model of payment for care and other services was adopted – were relatively expensive places to live for those who were self-funding their care and support services. This partly explains residents' preferences in some cases to change tenure and release housing equity to fund either future or current care needs.

Impact on local health and social services

Health and social service providers in host locations may be concerned that the establishment of a retirement village will increase the demands for services in a locality. Concerns about increased demands on health and social services may be overstated, and may be related to whether a village serves a predominantly local population or draws from further afield. How increased numbers of older people translate into demands for services is a key question that is not readily answered by currently available evidence. Evidence does, however, suggest that retirement villages play a role in maintaining and promoting health, provide opportunities for more efficient delivery of community services, and provision of interim and rehabilitative care.

In terms of community health service delivery, retirement villages offer many advantages to service providers. Time and resources are saved if general practitioners and other community-based health and social care professionals can visit more than one patient in one place. The relatively advantageous position of village residents (in terms of access to on-site care staff, meals, living in warm, barrier-free accommodation) can also assist community health care staff in prioritising their caseloads. Evidence from Hartrigg Oaks suggests that the provision of care in the on-site care home (as well as flexible domiciliary care) can allow early hospital discharge, and can sometimes reduce the need for hospital admission, with considerable saving for local NHS acute services.

Promotion of health and well-being

Retirement villages also play an important role in promoting health and well-being. Increased opportunities for social interaction and engagement can reduce the experience of social isolation, with consequent benefits to health, well-being, and quality of life. The study shows a much wider range of different resident-led interest groups in retirement villages compared to smaller schemes, and the benefits of a wider pool of people from which to draw friends and companions. This may be particularly important for older men, who are inevitably in the minority in age-segregated environments. The study also found much more evidence of 'solidarity in ageing' in larger schemes, with older people making organised responses to difficulties being experienced by individuals (for example, neighbours collectively organising assistance with shopping, meal preparation, visiting and so forth for people coming out of hospital) or by the community as a whole (for example, neighbourhood watch schemes).

Living in a purpose-built, barrier-free, efficiently heated environment removes many of the difficulties and dangers of living in inappropriate accommodation, in particular the risk of falls. Resident groups can be effectively targeted for health promotion initiatives (such as exercise programmes, falls prevention, blood pressure checking, flu immunisation, healthy eating). Larger schemes offer greater opportunities to provide health and exercise facilities, as well as more 'fun' exercise such as dancing groups, or exercise geared towards particular needs of those with particular health difficulties. On-site catering services can promote healthy eating, and cater for particular dietary requirements and ensure that everyone has the opportunity to have a hot, nutritious meal every day.

Impact of retirement villages on local communities

The benefits of retirement villages are not just confined to those who live there. They bring opportunities to address the current shortage of homes suitable for later life, by developing housing that is purposefully designed to meet the current and future housing needs of older people, releasing significant numbers of under-occupied properties in the wider community. They provide employment opportunities to local communities, and enhance the viability of local services. They offer older people living in the wider community the opportunity to access facilities that are purposefully designed and accessible.

Conclusions

Retirement villages are a relatively new development in the UK, thus 'hard' data that has measured the impact of living in retirement villages on residents' health status and quality of life, or the impacts on demand for other health and social care services is yet to be collated. Nevertheless the evidence we do have indicates the great potential of retirement villages to expand the choices of living arrangements for older people – offering the opportunity not just for decent age-appropriate housing, but also for enhancing older people's quality of life, health status, and sense of social well-being and security. Retirement villages bring opportunities for health and social care providers to deliver community services more effectively and efficiently, and can generate cost savings to acute health services through the provision of intermediate care.

About the project

The report was written by Karen Croucher, Research Fellow at the Centre for Housing Policy University of York, and draws on evidence from a previous study of Hartrigg Oaks (Croucher et al, 2003), an on-going comparative evaluation of different models of housing with care for later life, and a systematic literature review of the evidence related to housing with care for later life (Croucher et al, 2006). The reference to Bernard et al. is to Bernard, M., Bartlam, B., Biggs, S., and Sim, J. 2004, **New lifestyles in old age: Health, identity and well-being in Berryhill retirement village**, The Policy Press.

For further information

The full report, **Making the case for retirement villages** is published by the Joseph Rowntree Foundation (ISBN 978 1 85935 464 3, price £11.95).

The two reports on which this paper is based, **Housing with care for later life: A review of the literature** (Croucher et al., 2006) and **Living at Hartrigg Oaks: Resident views of the UK's first continuing care retirement community** (Croucher et al., 2003), are also published by the Joseph Rowntree Foundation and available through www.jrf.org.uk.

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