DISRUPTIVE DEMOGRAPHICS: INVENTING THE FUTURE OF PLACE & SPACE

New Thinking on Housing, Retail and Community in an Aging Society

Symposium Synthesis Report
The demographic transition from a primarily young population to an older one is the most profound socioeconomic factor shaping the future of markets and society. On Oct. 5, 2012, the AARP, in partnership with the MIT AgeLab, convened a symposium of business leaders, innovators and researchers to discuss the disruptive implications of aging on the future of housing, retail, and community. This report captures the participants’ insights and predictions about the challenges and opportunities that lie ahead.
The boomer generation—those born between 1946 and 1964—is the major player in the broad demographic shift from young to old. This affluent and influential cohort has driven trends in housing, retail, and community development for the past six decades. However, the boomers have not all prospered equally with age. The recent financial crisis, in particular, created divergent trends in wealth and income that will affect boomers’ ability to realize their wants and needs, exerting a strong impact on the future economy.

In terms of housing, most boomers hope to “age in place,” either in their home of many years or, for those accustomed to relocating frequently, the latest in a series of homes. Dwellings designed or renovated to enable aging in place tend to include features that prioritize residents’ safety, ease, and comfort—ideally without making explicit the infirmities of aging that they’re designed to counter. Soon, age-ready houses may also incorporate new in-home technologies that keep older homeowners healthy, able to delay the transition to assisted living for longer.

Product makers and retailers are also investigating how to adapt to an aging consumer population. For example, older consumers will be more likely to buy products that avoid deterrents such as fine print and packaging that is difficult to open. A reversal of the decades-old trend of larger and larger retail conglomerates and outlets may take place, as these retailers reconsider store design to account for the limited mobility and vision that many older shoppers experience.

Finally, as boomers navigate the challenges of aging, community will play a crucial role in stitching them together. The new approaches that are already helping connect older adults to each other and to the private sector include master-planned housing developments, creative approaches to senior housing, and the evolution of “villages” of older adults who provide trusted mutual aid and support to each other.

Despite their different backgrounds, the symposium’s experts identified three overarching recommendations for housing, retail, and community. The best products will provide improved usability not only for older consumers, but for all ages, including older consumers. The language used to market to the older demographic must resonate with aspirations and vitality, instead of age and infirmity. Last, any organization hoping to connect older adults with a product or service must personalize their offerings or provide concierge-like guidance, to overcome today’s claustrophobia of abundance.

Ultimately, forward-thinking companies, non-profits and policymakers will need to create the equivalent of a new American Dream to drive the private sector’s success in an aging America.

“Soon, the demographics of the entire United States will resemble those of Scottsdale, Arizona.”

Nancy Leamond, Executive Vice President, State and National Group, AARP
America’s largest generation, the baby boomers, are now turning 66 at the rate of one every seven seconds, said Dr. Joseph Coughlin, Director of the MIT AgeLab. Nearly 80 million strong, the aging boomers expect not just to live longer than their parents, but to live better. These expectations will be reflected in the built environment—where we live, shop, work and play.
Boomers have long wielded outsized economic influence, James Chung, president of Reach Advisors, revealed while providing an overview of the changing economic demography of the US. But today, income, wealth and home equity is spread very unevenly among the boomers, a fact that poses challenges for business incumbents and opportunities for new entrants.

Boomers started driving significant changes in housing, retail, and communities as children in the 1950s, when their parents’ demand for single-family dwellings led to the creation of suburbs and their secular cathedrals: the first shopping malls. By the 1970s, boomers entering adulthood defied a stagnant economy by driving the construction of apartments and condos; shopping malls gave way to megamalls. Twenty years later, boomers with children of their own traded up to larger houses and bought vacation homes, and flocked to outlet malls and big box stores, which precipitated another surge in homebuilding and reshaped real estate markets. Bigger, from homes to stores and even to the SUVs traveling between them, had become synonymous with better.

Today, the first boomers are reaching 67. Given their history of shaping housing, retail, and communities, this generation will continue to wield outsized influence on the economy and built environment. However, economic uncertainties in the wake of the housing and economic crisis, combined with changes to pensions, have cast long shadows over the boomers’ future. Will boomers have enough money to retire? Will businesses find profits or losses?

The answer for all of these questions, unsatisfyingly, is “yes and no.” Although most people’s real incomes dropped between 2000 and 2010, older Americans enjoyed an increase. But compared to retirees a decade ago, upcoming retirees have saved less and accrued more debt. Looking more closely at boomer finances, the wealth in this cohort is strongly divided. The most affluent boomers have only grown more prosperous in the past decade, even as most became poorer. As a result, the position of companies serving the mid-market has weakened. As a silver lining, however, most boomers yet to retire say they will delay retirement, and half believe they will never stop working, which means they will continue to earn money for longer than their parents’ generation.

Like wealth, which has become confined to fewer wallets, the housing boom and bust has also favored some people and geographic areas over others. Those who were hurt by the housing crisis may have zero or negative home equity. For those less affected, reverse mortgages may be an option to help fund retirement.

Independent of all the outside economic forces that threaten boomer spending power, per-capita spending tends to decline with age. Although boomers are now entering these years of diminished spending, those selling to this demographic will actually benefit, because boomers represent a 38 percent increase in that cohort.

In short, if a company is already positioned to serve an aging marketplace, it will see remarkable potential in market growth. Additionally, some sectors such as telecom and fitness, which offer compelling value to cash-strapped older workers and retirees, can buck negative economic trends even if overall spending declines. But of all sectors, the aging demographics of America will have the greatest potential impact on healthcare. Health in turn affects housing, retail, and communities because it determines activity levels, spending patterns, and needs. For instance, the aging of boomers will drive the expansion of hospitals, because hospital visits increase with age. What’s more, the obesity epidemic will add to healthcare utilization and necessitate the redesign of hospital beds and other healthcare equipment to hold greater weight.

Health, like wealth and home equity, has not been evenly distributed among the boomer generation. Different people will be physiologically affected by age in different ways and at different rates, which can render marketing specific products to traditional age segments ineffective. Customer needs will be determined by conditions, which may have little to do with date of birth.

A changing health landscape may allow new entrants to move in and dominate the healthcare market. Rod Vickroy, Director at Gensler, suggested that new wellness-oriented businesses may want to avoid medical office buildings in order to separate themselves from the ambiance of illness-oriented healthcare, aligning instead with Starbucks, Whole Foods, and fitness centers. Incumbents, meanwhile, tend to have a hard time dealing with changes to areas in which they previously excelled. For example, hospitals may find it hard to focus on prevention as opposed to cures, if that approach isn’t part of their existing business model. As Patrick Hurst, Managing Director of Houlihan Lokey said: “If you’re an incumbent with a hammer, everything looks like a nail.”

Throughout the symposium, attendees repeatedly raised the idea that the monolithic concept of “old” can hamstring our understanding of this huge, diverse demographic. Common definitions of “old” span more than 40 years, encompassing people who grew up during the Depression as well as those who came of age after Woodstock. This wide age range, often mistakenly conflated into one amorphous group, presents both challenges and opportunities for businesses, organizations, and government. For those attuned to the wide range of needs, desires, and assets available to the rapidly growing, diverse subpopulations that constitute “older adults,” the future will be full of possibilities.
As people age, their housing needs change. Today’s 45-plus population owns the majority of existing housing stock, but the question of where they will live tomorrow depends on whether they want—and can afford—to move as they age. Meanwhile, the senior housing industry has undergone significant upheaval of its own in recent decades. In the mid-1980s, the industry was dominated by nonprofits that built communities and sold access via entrance fees and buy-in models. However, today’s market consists increasingly of for-profit providers who build rental communities.
A s the members of the senior housing industry prepare for an influx of aging boomers, it will be important for them to recognize that boomers’ housing decisions will be guided by different expectations than those of their parents. Previous generations often lived in their family homes for their entire lives, but boomers are more accustomed to moving from one physical structure to the next. As some boomers renovate their existing houses for old age and others move to “age-ready” housing, the goal will be the same: to live independently for as long as possible.

The generations following the boomers will present challenges of their own. In prior decades, when boomers were in their peak earning years, they clamored for trade-up homes, causing an expansion of new housing development and elevated prices. But for the foreseeable future, while boomers shift from trading up to selling down, erasing the demand for new trade-up homes, Generation Y will be buying their first starter homes, not trade-ups. Real estate prices may remain low as a consequence of the glut of trade-up homes, not to mention uncertainty about interest rates and the possibility of changes to the tax code that impact the tax deductibility of mortgage interest. As a result of all these factors, boomers may find it difficult to sell their large homes.

When boomers do find a home in which to age in place, technology will allow them to do so for longer than their parents. Some exciting upcoming examples include sensors in the home that alert a neighbor or relative when the home’s occupant deviates from a daily routine, and other devices that monitor health or remind people to take their medications. Remote monitor services can even feed data to doctors, enabling older adults to receive a high level of healthcare while maintaining an independent lifestyle.

The biggest unknown that impacts age-related housing decisions is the question of when aging in place needs to give way to assisted living. In general, symposium attendees agreed that aging in place works as a solution when needs remain consistent. But when needs become unpredictable, assisted living/care is called for.

In the future, however, such traditional dichotomies of aging may become blurred. A resident, for instance, is someone who lives in her home, while a patient is someone receiving healthcare treatment. Future models that focus on wellness and move acute care into the home will defy the resident/patient dichotomy. This trend may be detrimental to incumbents like hospitals or nursing home providers that are wedded to their facilities.

For organizations hoping to make the best of the effects of disruptive demographic change on housing, age-friendly design is an essential tool. Even among communities that claim to serve the aging population, many homes require the use of stairs, lack key features such as no-step entries or bathrooms on the ground floor, and exist in locations that require the use of a car. Fortunately, home alterations that appeal to older adults can also provide ancillary benefits, including cost savings and improved environmental sustainability. For example, motorized blinds are not only easy to operate but also increase a home’s energy efficiency, while touchless faucets are both gentle on arthritic hands and also save water. The challenge in marketing age-friendly design is to focus on these side benefits, while treating age-related features more subtly. Many who don’t see themselves as in need of assistance readily accept age-ready features when they’re marketed as high-end style, or presented as useful in a way unrelated to age.

Home insurers and government entities making decisions about building codes should also pay close attention to trends in housing for older adults, attendees asserted. For home insurers, the longer policyholders can stay in their home, the longer they remain a customer. Consequently, The Hartford is looking to help people consider making age-ready changes to their homes, including grab bars, sit-in showers or easy-open cabinets, during times when they are remodeling for other reasons, such as due to a fire or flood. Meanwhile, most building codes “were developed for wheelchair-bound paralyzed veterans, whose needs are very different than 85-plus-year-old females,” said David Schless, president/CEO of the American Seniors Housing Association. Ideally, codes should promote design features that support safe, comfortable and convenient living across the lifespan, including old age.

If there’s a ray of light peeking through the cloud of the difficult housing decisions boomers will face, it’s that they’ve seen their parents navigate the same issues. Unlike previous generations, boomers who have helped their parents downsize already know a great deal about aging in place, assisted living and other senior care facilities. If boomers can take that experience and apply it to themselves, it will ease their own transitions when the time comes.
Consumers over age 45 control the largest share of the nation’s discretionary income, and how these older consumers spend their money and influence the spending of other generations will significantly impact product makers, retailers, and retail space developers. Will big parking lots disappear as walking becomes more difficult for boomers? Will the specialized needs of increasing numbers of older consumers spark the creation of expanded service centers within retail stores, such as health services, financial advice, and technology services and education?
One way to better understand the challenges of navigating a retail environment as an older consumer is to step into that consumer’s shoes, as literally as possible. To better allow younger store designers, product developers, architects and planners to understand these challenges, the MIT AgeLab developed AGNES (Age Gain Now Empathy System), a jumpsuit that replicates the physical challenges associated with aging and advanced chronic disease. CVS Caremark executives who wore AGNES while walking through CVS stores experienced first-hand what it’s like to navigate store aisles, pick products off store shelves, and check out as an older consumer. In a similar vein, artist and educator Leslie Fontana, professor of industrial design at RISD, experienced reduced dexterity when she suffered a serious accident that almost amputated her hand. The injury gave Fontana a new sense of empathy about the challenges seniors face, and led her to offer a class focused on designing for older adults.

Several speakers advocated another approach to help older shoppers: the use of computer-aided technologies, both online and in-store. Carley Graham Garcia, head of Google’s Global Industry Relations team, shared three ongoing trends in online shopping: the increasing use of video on retail websites, use of smartphones in online shopping, and growing importance of user-generated information, such as product reviews. All three of these trends stand to help consumers of all ages make decisions.

Computers can aid shopping in bricks-and-mortar stores as well. Multiple product choices on the shelf can be overwhelming, but in-hand business intelligence software can provide shoppers with personalized information, such as the right shampoo for a particular type of hair. Additionally, computers can provide a secure communication channel to trusted service providers and advisors, such as physicians, which may become increasingly essential as the line between retail and healthcare becomes less distinct. Currently, boomers account for $500 billion per year of direct healthcare spending, and that money may increasingly go to wellness and prevention businesses in a retail— as opposed to hospital— setting.

“The big trend we see coming now is retail-oriented healthcare,” said Rod Vickroy, Director at Gensler, who sees outpatient facilities combined with emerging retail as a means to get as far away from the hospital as possible. Product designers face a similar challenge to that of store designers, taking into account consumers’ experiences at two key moments: when the customer is in the aisle deciding what to purchase, and when she is at home about to use the product for the first time. In particular, tiny print on the product in the aisle may appear indecipherable to aging or even young eyes, and at home, tough plastic packaging designed to prevent theft and optimize display can be a real challenge for anyone to open. The most age-friendly products will not only account for users’ physical needs, but their psychological ones as well. Take incontinence underwear: the current institutional design ethos of this product seems more aligned with sickness and infirmity than with wellness and activity. Products of the future must be personal, easy, lasting, original, and whenever possible, aspirational: enabling the user to do the activities she wants, not serving as a reminder of the conditions that hold her back.

The members of the symposium came up with a number of recommendations for those looking to help an aging population navigate an increasingly complex retail environment, online and off. Older consumers tend to prefer smaller, easy-to-navigate stores where it’s easy to locate personal help, and thanks to insights like those provided by AGNES, store designers may start to include higher, Shallower shopping carts that make it easier to get items in and out, and relocate age-relate products from lower shelves to eye level, to reduce the need to bend down. Meanwhile although older shoppers with diminished eyesight are likely to need personalized help within the store, CVS will soon ask store clerks not just to indicate where an item is located, but to walk with the shopper to the product’s location, a practice that will promote loyalty among customers of all ages. For stores lacking the staff necessary to provide personal assistance, technology will be used to provide that consultation instead.

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What makes a community? Antiquated notions of retirement communities are becoming more exception than norm: today’s retirees are more interested in living near family or friends than a golf course, and often choose to do so in their homes of many years. How will existing and new communities develop services to support their needs? How can business, government, and other organizations promote an age-friendly built environment?
Baby boomers will demand six characteristics from a community, symposium participants said: quality of life, connection, access, affordability, wellness, and qualified caregivers.

Several presenters outlined master-planned communities designed to accomplish these requirements, which have on the order of a few thousand people living in a well-provisioned, mixed-use built environment, with co-located walking paths and parks. In The Pinehills, a community built on 3200 acres, 70 percent of the land is open space. The homes in the community were built by different homebuilders and offer different lifestyle choices. All mail is delivered to a central post office, which is located next to a cafe and retail, maximizing the likelihood of chance encounters among friends. And in Rouzan, Baton Rouge, LA, connectivity is of the utmost importance. Homes have front porches that overlook interconnecting sidewalks, and there are plans to build a new public library, Montessori school and nondenominational church. Daybreak in South Jordan, Utah is a larger community, with 10,000 people of all ages. Tethered by a light rail connection to Salt Lake City, 19 miles away, Daybreak’s Senior Living Community is near the village center, transit hub, health center, and a large green space.

A master-planned development isn’t the only way to create a supportive community for people as they age. The Village to Village Network, a peer-to-peer nonprofit, enables local organizations, known as “Villages,” to help members stay in their own homes as they age, in part by vetting and negotiating with providers of services and programs. Beacon Hill Village in Boston was the first of these Villages, and there are now 110 others nationwide and 150 in development. Beacon Hill Village, which is run primarily by volunteers, has 400 members but only 4 staff. Villages are grassroots, non-profit, self-governing and self-supporting. “It’s about crowd-sourced aging-in-community,” Dr. Coughlin said.

Cultural facilities such as museums, which attract the young and old alike to highly social and “authentic” gathering places, can serve as community anchors. “Nothing is more authentic than real objects in real spaces,” said Philip Katz, Assistant Director for Research at the American Alliance of Museums. “Lifelong learning, in museums or elsewhere, should truly be lifelong,” he added. By offering mixed-use facilities with age-friendly design and compelling events, a community can avoid the stigma of a nursing home or old-age ghetto.

It’s impossible to discuss communities without bringing up transportation. Symposium members emphasized that communities designed for older people need to be planned and built with transportation and mobility in mind, especially walking, which has a tangible health benefit. Forty-two percent of older adults meet targets for aerobic exercise if a safe place to walk is within ten minutes of their home, but that value is halved if walking opportunities are further away.

Despite the desirability of walkable communities, zoning laws that separate housing and retail stymie such behavior. Regulations requiring multiple parking spaces per home make little sense for older and younger homeowners alike who have one or no cars. Fortunately, in the near term, innovations such as carsharing and ridesharing services can help the 70 percent of Americans over 50 who live in suburban or rural areas where walking and mass transit are not viable options, said Mitsuaki Hagino, Deputy General Manager of the Mobility Services Lab at Nissan. Looking to the future, autonomous vehicles, such as Google’s self-driving car, may someday come to pick people up and drive them safely to their destination, on demand.
In Daybreak, near Salt Lake City, Utah, land once intended only for mining is being transformed into a vibrant master-planned community that has had great success in attracting residents of all ages.

Although the three roundtables covered distinct but interrelated areas—housing, retail, and community—many participants mentioned crosscutting issues relevant to all three. As boomers grow older, organizations involved in housing, retail, and community face three shared challenges: deciding what to offer to a new generation of older consumers, explaining those offers in an enticing way, and guiding and advising consumers to the most suitable products and services.

Recommendations: Creating a New Vision for Aging
Age-friendly design, for instance, in addition to addressing the needs of older consumers, needs to be innately enticing: hip or useful enough that it appeals to all ages. Take OXO’s easy-to-grip kitchen utensils: although they were designed for arthritic hands, their top-shelf usability is something anyone can appreciate. Accessibility principles apply to computers as well, such as in the case of a browser plugin that IBM built for a department store in Japan that lets the user customize font size.

But “universality” in design may be less universal than we think, some roundtable members said. Current accessibility codes weren’t designed with frail 90-year-olds in mind, nor are they universal—someone in a walker or with balance problems needs smaller bathrooms than someone in a wheelchair, for instance. The challenge for designers is to find the best common denominators for diverse needs.

Like designers, marketers for housing, retail, and communities share the problem of how to attract older consumers without implying that a product or service makes the consumer “old.” Terms like “healthcare,” for instance, carry connotations of illness. Words like “easy,” “convenient,” “personalized,” “authenticity,” and “wellness,” meanwhile, can stand in for more obvious references to aging. For more age-aware consumers, the endorsement of a trusted brand like AARP might indicate age-friendly features. Done well, marketing can promote conversations and decisions that help people achieve their long-term goals, even if some of those people would rather avoid thinking about those issues.

Even as designers and marketers come up with more and better-targeted products and services, overabundant options in retail, housing, and community can create a stifling burden of choice, especially as we age. One solution to addressing the claustrophobia of abundance is to create greater personalization—producing more relevant information rather than just more information. This personalization can be handled in at least three ways: personal concierge-type service, peer-to-peer recommendations, and big-data-driven insights, such as personalized medicine and nutrition.

In Rouzan, LA, gathering places such as a public library give the community an authentic sense of connectivity.
Even as insights mounted throughout the symposium, many questions came up that would remain unanswered. Underlying many of these questions was a sense of uncertainty about what life could and should be like in old age, because the traditional narrative of American success stops giving instructions after “have kids, send them off, retire.” After completing that last step, decades of life remain, and many don’t know what to do with themselves. The vast majority of Americans want old age to be more than fairways and rocking chairs—much more.
As boomers pass into retirement and life expectancies continue to rise, it’s becoming clear that we need a new narrative for a new old age. This narrative may well be built upon strong communities, which in turn will rely on the retail products, wellness activities, mobility services, and housing design elements that allow people to actively participate in community life for as long as possible. Aging in a group setting, whether in master-planned communities, Village to Village cooperatives, next-generation senior housing—even in virtual, online networks—is a great way for people to stay in their homes and yet retain a support network to help them age in place.

The vision of what it means to grow old today is still unformed. But if innovators in businesses, non-profits and government can build a new, compelling dream of old age, boomers in search of a narrative will come. Should this new storyline of old age catch on, it’s possible that future generations will remember this narrative as the boomers’ most lasting legacy.

A thriving outdoor scene at master-planned community The Pinehills, in Plymouth, MA.
AARP

is a nonprofit, nonpartisan organization, with a membership of more than 37 million, that helps people turn their goals and dreams into real possibilities, strengthens communities and fights for the issues that matter most to families such as healthcare, employment security and retirement planning. We advocate for consumers in the marketplace by selecting products and services of high quality and value to carry the AARP name as well as help our members obtain discounts on a wide range of products, travel, and services.

The MIT AgeLab

was created in 1999 to invent new ideas and creatively translate technologies into practical solutions that improve people’s health and enable them to “do things” throughout the lifespan. Equal to the need for ideas and new technologies is the belief that innovations in how products are designed, services are delivered, or policies are implemented are of critical importance to our quality of life tomorrow. Based within MIT’s School of Engineering’s Engineering Systems Division, the AgeLab has assembled a multidisciplinary team of researchers, business partners, universities, and the aging community to design, develop and deploy innovations that touch nearly all aspects of how we will live, work and play tomorrow.
Authors:

Joseph F. Coughlin Ph.D.: Director of the Massachusetts Institute of Technology AgeLab, Dr. Coughlin’s research provides insights on how demographic change, technology, social trends and consumer behavior will converge to drive future innovations in business and government. He teaches transportation planning and policy at the MIT School of Engineering and School of Architecture and Urban Planning. Based in MIT’s Engineering Systems Division, he is the author of the online publication Disruptive Demographics. He is one of Fast Company Magazine’s “100 Most Creative People in Business” and was named by the Wall Street Journal as one of “12 pioneers inventing the future of retirement and how we will all live, work and play tomorrow.”

Nancy LeaMond Executive Vice President of AARP’s State and National Group, Ms. LeaMond leads government affairs, public education and integrated legislative and educational campaigns (including You’ve Earned a Say, AARP’s national initiative to engage Americans in the debate over Social Security and Medicare) for AARP’s social change agenda. She also has responsibility for AARP’s state operation, which includes offices in all 50 states, the District of Columbia, Puerto Rico and the U.S. Virgin Islands. A member of the AARP Executive Leadership Team, she began her tenure at AARP in 2001 as Director of Internal Affairs.

Karen Anderson President and CEO, Cordia Senior Management. The founder of Cordia, Ms. Anderson provides the strategic vision and leadership for all facets of the business.

Christopher Bernier Regional Vice President, Coldwell Banker Residential Brokerage, New England.

James Chung President of Reach Advisors, a strategy, research and predictive analytics firm focused on emerging shifts in the consumer landscape.

Lisa A D’Ambrosio Research Scientist, MIT AgeLab. Currently working on research with Dr. Coughlin on the social aspects of aging, focusing on what an aging population will need to enhance and improve the quality of life, and to enable elders to live independently longer.

Jon Daupiné Senior Vice President of AARP’s Education & Outreach (E&O) group. Leads the Association’s efforts to engage and educate consumers and other stakeholders on key health, economic security, and livable communities issues, including those related to housing, mobility and safe driving.

Leslie Fontana Faculty member in Industrial Design at Rhode Island School of Design and a past recipient of RISD’s John R. Frazier Award for Excellence in Teaching.

Carley Graham Garcia Head of Global Industry Relations for Google, Inc., where her focus is fostering affinity for the company amongst the industry trade and customer audiences. As part of this global role, she leads the team responsible for managing relationships with key industry associations and for enhancing relationships with and driving revenue opportunities for Google’s media properties.

Larry Gotlieb Vice President, Government and Public Affairs, Associate General Counsel, KB Home. Advises senior management about legal and policy issues, with a focus on sustainability.

Tom Grape Founder, Chairman and CEO, Benchmark Senior Living, the largest provider of senior housing in the Northeast.

Tony Green Managing Partner of Pinehills LLC, home of the award-winning, master-planned community The Pinehills in Plymouth, Massachusetts.

Mitsuaki Hagino Deputy General Manager in charge of Mobility Services Laboratory, Nissan Research Center.

Patrick Hurst Founder and Co-Head of Houlihan Lokey’s Healthcare Group, a Managing Director in Houlihan Lokey’s Chicago office and a Houlihan Lokey Corporate Finance Board member.

Michal Isaacson Postdoctoral fellow at the MIT AgeLab. Research focuses on the individual’s spatial behavior using advanced tracking technologies.
Authors Continued:

Philip Katz
Assistant Director for Research at the American Alliance of Museums, where he compiles data on the impact of museums and scans the horizon for trends at the Center for the Future of Museums. His latest publication, co-authored with Elizabeth Merritt, is *TrendsWatch 2013: Back to the Future*.

Sandra Kulli
President, Kulli Marketing, which consults with residential builders and mixed-use developers on marketing strategy, leading outside marketing resources in concert with builder/developers’ staff.

Kent Larson
Director of the MIT Media Lab’s Changing Places group. Since 1998, he has also directed the MIT House_n research consortium in the School of Architecture and Planning.

Trapper Markelz
Head of Product, MeYouHealth, which was founded in 2009 to promote everyday wellbeing by bringing to market realistic, convenient, immediate, and genuine online consumer health products that encourage small actions and foster the social ties that drive meaningful behavior change.

Sarah Montante
Brand Manager, New Business Creation, Beauty & Grooming at Procter & Gamble.

Jodi Olshefski
Assistant Vice President & Gerontologist at The Hartford. Heads The Hartford Advance 50 Team, a nationally recognized corporate gerontology group that delivers services across The Hartford Financial Services Group.

David Schless
President of the American Seniors Housing Association (ASHA) since its creation in 1991. He holds a BS from the University of Connecticut and a MS in applied gerontology from the University of North Texas. Based in Washington, DC, ASHA represents the interests of companies that finance, develop and operate the full spectrum of housing for seniors—from independent living to assisted living and memory care, and continuing care retirement communities.

Vicki Shepard
Senior Vice President, Strategic and Government Relations, Healthways. Provides leadership, business development and ongoing relationship management with government officials, strategic company partners, stakeholders, and industry and trade associations.

J. T. “Tommy” Spinosa
Owner and manager of JTS, a developer of award-winning retail, mixed-use, multifamily and office projects throughout the Gulf Coast region.

Rod Vickroy
RID, LEED AP, Associate, Gensler, North Central Health & Wellness Practice Area Leader, Chicago.

Frances W West
Worldwide director of the IBM Human Ability and Accessibility Center (HA&AC), a part of IBM Research. In this position she advances IBM market leadership by driving inclusive technology innovation and solution development.

Judy Willett
National Director of the Village to Village Network, which services communities that are creating their own Villages all over the country.

Luke Yoquinto
Research Associate, MIT AgeLab. He is a science and academic writer and editor.