"Residential 'Social Mix': The Debate Continues"

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1.0 Introduction

The idea of the socially mixed community is truly resilient. While the "annuals" in the town planning garden bud, bloom and disappear from sight, one perennial continues to influence residential planning in Australia and baffle those who seek to evaluate its effectiveness. As Australian cities become more polarised and governments seek to reduce spatial inequality by implementing "mix" policies, it is timely to review the pedigree of this hardy concept. (1)

This paper discusses some of the goals which the concept of residential social mix has sought to achieve in the century since its emergence as a town planning ideology. Recent research is reviewed and some general guidelines for planning socially mixed residential areas in Australia are suggested. The need for Australian evaluative research is emphasised.

1.1 Historical Overview

Since the middle of the last century, the planning of many residential areas has been based on the assumption that a socially mixed community is a desirable goal and that physical planners can achieve real social mix, interaction, awareness and a "feeling of community". As early as 1849, a British industrialist proposing a new "model town" for his employees claimed that "the highest degree of health, contentment, morality and enjoyment yet seen in any existing community" would result if his town of New Victoria were peopled by "an adequate number of inhabitants with such due proportions between the agricultural and manufacturing classes and between the possessors of capital, skills and labour" (Buckingham, 1849, quoted in Heraud, 1968:34).

Probably the first planned example of a socially balanced community was George Cadbury's Bournville, established in 1879 with an explicitly enforced mix of renters and owner-occupiers, high-status and low-status Cadbury employees and employees and non-employees (Sarkissian and Heine, 1978).

The view that the neighbourhood could accomplish certain social goals was also held by planners of the Garden City Movement. Among their aims was "the decentralisation of city populations to smaller scale settlements planned on low density, neighbourhood lines as socially balanced communities" (Heraud: 33-34)

The idea of a "balanced community", containing a population which was heterogeneous in age, class, and income, grew in popularity during the 1930s and 1940s and became an important objective of the Reith Committee, established in 1945 to plan the British New Towns. By that time, however, social researchers were beginning to question the benefits of heterogeneity.

Some writers, such as Australian urbanist Hugh Stretton, have argued that without a heterogeneous population a neighbourhood cannot provide the choices and experiences necessary for a meaningful life (Stretton, 1970:103-118). Others argue that age mix is essential if community organizations are to have effective leadership (Pitt, 1959:263-265). One striking fact, however, overshadows all the tributes paid to the idea of social mix over the last century. Residential areas in developed western countries are characterized by a high degree of homogeneity in their social composition. Planners have despaired at their inability to integrate populations and governments have responded by proposing policies based on social and racial mix which have, on the whole, been unsuccessful (2) Throughout this debate scholars have questioned the initial assumption of the neighbourhood as a social unit, as well as the scale at which balance should be achieved, and the benefits and liabilities of heterogeneity. (3)

1.2 Goals which social mix has been directed to achieving

Over the years the idea of social mix in housing has been suggested as a means of achieving a wide variety of goals. Some of the key goals are summarised below (see also Sarkissian, 1976; Sarkissian and Heine, 1978).

GOAL 1: *To raise standards by nurturing a spirit of emulation.*
This has been a goal since the nineteenth century. Early advocates of mix argued that the neatness, cleanliness and general attractiveness of the poor could be expected to improve through frequent visual contact with the higher order. The lower classes might at least be roused from their lethargy and indolence by the example of nearby models of middle-class respectability.

GOAL 2: *To encourage aesthetic diversity and raise aesthetic standards.*
Diversity of buildings in residential areas occupied by different social classes could add beauty and stimulate inhabitants to keep their housing up to a standard worthy of the whole.

GOAL 3: *To encourage cultural cross-fertilisation.*
It has been argued that socially mixed residential areas promote intellectual and cultural advances and could help maintain the cross-fertilisation of ideas among social groups.

GOAL 4: *To increase opportunity.*
Many social theorists have promoted social mix as a means of restoring lost opportunities to communities. They argue that mixed communities are essential to a society with freedom of choice, freedom to move up occupational and social ladders, and opportunity to participate fully in economic and political life. George Cadbury's Bournville was seen at the time of its establishment and even t o d a y as a successful example of enlarged opportunity achieved through mix in high-quality schools. Other have claimed that privileged, homogeneous communities become hot-beds of reactionary political action, limiting opportunities for underprivileged people, and that the schools in segregated, poor communities impair the ability of the child to profit from educational opportunities. This has been an important debate in the United States, where the socially mixed community has been seen as a way of avoiding the problems of segregation.

GOAL 5: *To promote social harmony by reducing social and racial tensions.*
Social harmony could be achieved, it has been argued by reopening channels of communication and interaction, decreasing distrust and hostility, and promoting a better understanding between classes.

GOAL 6: *To promote social conflict in order to foster individual and social maturity*.
By contrast, mix has been advocated by some social critics as a source of disharmony essential to individual psychological growth and society's salvation. By recognising the "vitalizing challenge of dissonance", some have sought finally to reconcile varieties and antagonisms by emphasising them.

GOAL 7: *To improve the physical functioning of the city and its inhabitants.*
The apparent incompleteness and dependence of homogeneous cities has produced several functional (or `hard') arguments for neighbourhood mix, including: leadership; employment balance and economic stability; and maintenance of essential services at minimum expense. Similar `hard' reasons for mix are recommended by many contemporary planners. In order to support even the most elementary civic equipment, such as roads, sewers, fire departments, public transport, police services and schools, a mix of income groups is essential, particularly where local taxes still account for a significant proportion of expenditure on local services. Mix would reduce strain on public facilities and help to spread the peaks of non-use and over-use.

GOAL 8: *To help maintain stable residential areas.*
Community stability is seen as a beneficial outcome of a policy of mixing by those who believe that a high degree of residential mobility threatens social and kinship networks. A mix of housing types, sizes, costs and tenures permits existing residents the choice of staying within their own area as their housing requirements change. Age mix is recommended for the same reason. Advocates of a fairer housing policy for low-income families have argued that a varied housing stock also permits the most equitable allocation of resources, reduces problems of underutilisation of housing and may lower total housing costs.

GOAL 9: *To reflect the diversity of the urbanised modern world.*
A 'global' or `holistic' approach to planning has found supporters, such as Lewis Mumford, who have argued that the residential area should reflect in itself and its immediate surroundings, the variety and mix of the wider physical and social world. Contact with different sorts of people should also be a part of residential life. The physical environment in the mixed neighbourhood can be provided with urban places designed for democratic meeting places, in residential neighbourhoods where the whole national social structure could be represented. Feminist writer Dolores Hayden provides a recent example of this idea in her design for a non-sexist city (Hayden, 1980:S181).

GOAL 10: *To provide freedom of choice in housing.*
This goal is expressed particularly to aid minority and disadvantaged groups, who have traditionally been denied access to "open housing". This argument has been advanced by civil rights advocates in the United States and by those who have argued in favour of providing housing for the poor in the suburbs, subsidising housing in private developments, and access to housing for one-parent families, homeless people, teenagers and members of communes (Gans, 1961; Davidoff et al., 1970; Downs, 1973; Gruen and Gruen, 1972; Rubinowitz, 1974, Hayden, 1980).

This goal is also found in the literature on British New Towns. The structure plan for Telford New Town, for example, states that one of its goals is to provide "Freedom of Choice". Housing mix is a recommended way of achieving that goal.

1.3 Philosophical and Ideological Critiques in the 1970s

While planners have somewhat simplistically continued to advocate mix, sociologists led the attack against planning for "social mix" by explaining that attempts to foster interaction are based on a fundamental misunderstanding of the neighbourhood as a social unit. As early as 1942 the *American Sociological Review* published an article begging for research into the interaction which planners expected of the neighbourhood (Sweester, 1942:525).

In the mid-1970s in England, James Simmie made a very different argument for the mixing of people from different social backgrounds (1975). He argued that looking at people's lifestyles is, in fact, turning a blind eye to the real issues. Irrespective of the outward appearance of lifestyle, the key problem f a c i n g planning is one of resource allocation. Simmie was extremely critical of planning which, he argued, primarily perpetuated a single philosophy: all resources for the rich and no resources for the poor. The actions of planners, government and social administrators inevitably reflect this philosophy of one-way resource allocation. It is obvious that in practice the social backgrounds of the planners and administrators frequently tend to dictate the desirability of heterogeneity. That is, planners are imposing their values on unsuspecting users.

Although it did not directly treat the issue of social mix, Simmie's work provided a new perspective. He argued that with social planners lie both the opportunity and the responsibility for accelerating social change. The deliberate interaction of people with differing social backgrounds will facilitate the development of an alternative society. To Simmie, mix was a way to threaten the security of the social system as it existed and a way to ensure that there is a more equitable distribution of resources.

Bell and Newby's (1976) influential critique of the concept of "community" in planning also indirectly criticized the idea of social mix, particularly the idea of the neighbourhood unit with its underlying ethos of harmony and local hierarchical authority. They suggested that mere proximity does not provide "community", and that other variables like class-consciousness and conflict may lead to strong ties among residents.

Richard Sennett's provocative book, *The Uses of Disorder,* (1970) viewed the average person's desire to be with their own kind as a weakness and advocated conflict as the means to self-awareness and community awareness. For Simmie, heterogeneity at the micro-level provides the opportunity for constant interaction and conflict and the re-learning of important social skills that we have lost in the process of our voluntary enslavement to routine and boredom. Greenbie (1976) suggested, however, that conflict can occur in both homogeneous and heterogeneous neighbourhoods. An important aspect of the homogeneous neighbourhood (also recognised by Perin [1972:51]), is that residents rarely express conflicting thoughts about the way in which conflicts should be resolved.

1.4 The Revival of Interest in Social Mix

In the early 1980s the mix of income groups in residential areas, fashionable as a planning and housing concept from the early 1950s until the 1970s, seemed to drop from public view as other priorities were identified by planners and urban administrators and fewer research funds were available for social research into urban issues, particularly in the United States. By the mid-1980s, however, attention (if little research) had again focused on "social mix", apparently for three reasons. First, in Australia there was a growing concern in the three tiers of government about the negative effects of large concentrations of low-income residents, especially in inner city and outer suburban areas of large cities.

The second reason for renewed interest is related to costs. Private housing is less attractive to

purchasers if it is located near large concentrations of housing for low-income people. Not surprisingly, therefore, State government housing authorities in most Australian States developed "social mix" policies in the mid-1980s, sometimes limiting the numbers of public rental units on one site and/or requiring a (usually quite small) proportion of dwellings in a new private development to be for low- income people. This mix of equity considerations and stigma reduction to boost private sales is now fairly well established in Australian housing policy.

Cost considerations also feature in the third main reason behind renewed government interest in social mix. State governments are increasingly short of funds for public housing, while waiting lists have risen alarmingly in recent years. As Federal funding for public housing has diminished, State governments have searched elsewhere, increasingly in the private sector, for assistance. Pugh has commented that "for the future, and for those with an interest in practising residential mix, it is now a matter of taking a circumspect view of constraints and opportunities" (1978:39). Thus we see the flowering of a wide assortment of projects which allow governments to form partnerships with private enterprise to reduce housing and associated costs. A byproduct is social mix. In the United States, the use of "linkage" and exaction programs where local governments impose a fee on developments, often in the form of the provision of a certain number of low-income housing units, has also led to a form of socially mixed housing development. Like the Australian case, it is more a byproduct of innovative financing of low- income housing than intentional social mix. (4)

2.0 Empirical Studies of Social Mix to the 1970s

Among the principal issues which have been addressed in empirical studies of social mix are the following: the degree to which there is a supportive atmosphere in the host community; the extent to which the community is established, stable, or changing; levels of resident satisfaction; the effects of integration upon property values and schools; the effects of socio-economic status, housing types, prices, and locations; and the long-run stability of mixed communities (Clapp, 1975:4-5).

Maintaining Mix
The literature dealing with urban sociology and urban problems often concludes that social mix is an unworkable concept in practice. Johnston (1971) for example, argued that in the early period of suburban development, neighbourhoods were very much places of extensive social interaction; over time they have developed into homogeneous units reflecting similarities in residents' occupations and social backgrounds. This trend toward neighbourhood homogeneity is also examined by Heraud (1968:48). His study suggested that residential mobility in new housing estates is a sifting process: families move in and out of neighbourhoods until they find an area which they consider to be comparable with their background and aspirations. Heraud concluded that planners must accept the reality of homogeneous neighbourhoods, since planners' attempts to create mixed neighbourhoods have failed. Research by Caplow and Forman (1950) reached a similar conclusion. While their findings were not as pessimistic about the opportunities for maintaining dissimilarity in neighbourhoods, they emphasised social aspiration as a more important factor in neighbourhood planning.

Research does indicate, however, that certain groups are more tolerant of heterogeneity. For example, there is less concern with the "social tone" of the area in the pre-child and post-child periods in the family cycle. Ethnic and minority groups may be more tolerant of racial or social mixtures than representatives of the majority group. And persons who view current housing arrangements as temporary, in particular single adults, newlyweds, very young families in the pre-purchase stage, and transients, may tolerate heterogeneity well (Foote *et al.*, 1960:203-207). This is a delicate issue, as people with the resources to do so can move to the kinds of neighbourhood they desire, no matter what mix planners may propose.

Emulation
In the London suburb of Dagenham, Willmott (1963) found a high degree of satisfaction with housing and the social environment, partly because residents believed that they all had similar social aspirations. Willmott was not, however, willing to concede the primary importance of homogeneity. He saw value in "working-class" people bettering themselves through emulation of the "middle classes", and pointed to the increasing amounts of furniture and fittings in "working-class" homes as evidence that this process was already taking place.

Klein (1965) suggested that where social factors are equal, individual resident behaviour can alter neighbour relations. Families who do manage to 'better' themselves often feel alienated from their neighbours if they change spending and social patterns. Similarly, people who do not share the norms of the surrounding population often find interaction with neighbouring residents difficult.

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Gans (1961) also argued that local heterogeneity would encourage low-income families in the United States to better themselves. He questioned the success of mixing at a neighbourhood level, however arguing that planners should concentrate on providing the population with wider social and economic choices. Cooper (1975) supported this view from her studies into the lack of `community' in a new subsidised housing development in San Francisco. She argued that lack of contact among neighbours led to varied perceptions of the resident families by other families living in the development and resulted in the residents perceiving their area as being heterogeneous. Some residents, therefore, did not wish to create ties with their neighbours.

Class Mix and Life-style Mix
The desire to be with one's own is an underlying finding of many studies in this area. Ineichen (1972:387) contended that much contemporary neighbouring behaviour reveals the preference of people to be with their own kind. In Britain, according to Ineichen, people prefer neighbours of similar occupational and social backgrounds.

Collison's *Cutteslowe Walls* (1963) distinguished between class mix and the inter-weaving of different lifestyles. He suggested that the relevance of theories of mix depends upon the section of the social strata being considered. Mix is affected by factors in the community, such as housing decay renewal, both of which have an effect upon the lifestyles of residents and may bring about changes in the facilitates some degree of social mix. In Collison's study, the removal of a wall between a private housing estate and a council estate effectively created a mixed community in which people reported that they were happy. Collison proposed that, paradoxically, people generally favour a housing policy which mixes people of different social backgrounds. Given freedom to choose, people will seek socially homogeneous areas, however.

Keller (1968) warned planners that, unless they have a thorough knowledge of the ways of life of different class and status groups, they should be very wary of recommending mixed communities. She argued that it was doubtful whether people from separate class or status backgrounds would socialise or make friends easily with people from social backgrounds different from their own. This is particularly true for those from different positions in a status hierarchy. As a consequence, one typically finds in housing estates people of similar social class, ethnic or cultural backgrounds congregating together to the exclusion of people of dissimilar backgrounds.

There is ample evidence to support this contention in the way in which people attempt to obtain some level of exclusivity in their neighbourhood, irrespective of their social background. According to Keller, attempts to achieve mix on new housing estates have been decidedly unsuccessful; in many cases this policy has led to hostility and conflict, rather than to the development of a more varied community.
Social contrasts, she argues, definitely do not create or foster community development. In fact, Keller argued that the concept of planning for mix at the neighbourhood level should be abandoned. While her evidence from studies by Gans (1963), Foote *et al.* (1960) and Schorr (1963) refuted some of the notions of social mix, she agreed with Willmott (1963) that mixing at a wider *community* level for economic, social and cultural reasons is a desirable aim.

Keller also suggested that it would pay to study a homogeneous population (that is, homogeneous as to social class). Here one might find that in terms of its heterogeneity of religion, education, ethnic and cultural backgrounds, mixing does occur on a neighbourhood level. Quite often people are not concerned about issues of homogeneity and heterogeneity (where they relate to the characteristics of an individual), as long as their lifestyle and values reflect the homogeneity of the neighbourhood. This common acceptance of a value system is closely related to a number of other factors. People living on a housing estate who are satisfied with their environment, particularly people who own their own homes, are more likely to perceive their neighbourhood as being homogeneous, even if they are diverse in ethnic or economic terms. One could conclude that in some cases it could be more appropriate to mix home owners than to mix renters.

2.1 The Bournville Study

A study in Bournville, a suburb of Birmingham, England, designed specifically to assess resident satisfaction with a planned mixed community (Sarkissian and Heine, 1978), began with some preconceived notions of homogeneity and heterogeneity, primarily based on sociological considerations and the explicit mixing policies of the founder, George Cadbury. The results indicated, however, that people in the so-called 'heterogeneous' community of Bournville saw themselves as being relatively `homogeneous', because of their common value systems and lifestyles, and because of the high standard of their housing, combined with home ownership or low rents. In the `control' sample,

the homogeneous Council housing estate of Weoley Castle, the opposite was found to be true. People in that estate saw themselves as living in a relatively heterogeneous area because of the wide and easily perceived differences in residents' lifestyles. In the 'control' sample there were more conflicts and neighbours did not know each other as well as they did in Bournville.

In the well-established community of Bournville, length of residence and, indirectly, economic investment in the community, were important factors in determining levels of satisfaction (see also Durand and Eckart, 1973). One of the conclusions was that people are less concerned with sociological, economic and political concepts of class and more concerned with the way people live. This finding reinforces the view that lifestyle, or at least the appearance of a similar lifestyle, is a significant factor in residents' acceptance of mix. No clear-cut evidence of 'embourgeoisement' of low- income families in Bournville was revealed, although the attitudes of low-income people in the two sample populations differed. In Bournville low-income respondents showed a tendency to agree with middle and high-income respondents in their attitudes to environment.

2.2 The Possibilities of Micro-integration

In an American study, Durand and Eckart (1973) argued that there is little or no evidence of a relationship between community feeling or satisfaction and neighbourhood homogeneity. They were less convinced that there is no relationship between these same factors and neighbourhood heterogeneity. Durand and Eckart found that resident satisfaction is likely to be higher in areas where intensive neighbourhood contact occurs than in areas where there is little contact. Their findings link neighbourhood contact to length of residence. The Durand and Eckart study is important because the authors concluded that maximisation of community satisfaction should not necessarily be the main ingredient in resolving the issue of homogeneity and heterogeneity in neighbourhoods.

In an earlier article, not based on empirical evidence, Gans (1973) suggested, on the other hand, that through a deliberate policy of housing location, neighbourhood contacts can be stimulated and therefore community satisfaction enhanced. At the same time such a policy can integrate residents from widely different racial and social class backgrounds. Gans did not suggest that heterogeneity (through the integration of different racial and class groups) can occur in every neighbourhood at every level. That is, he did not advocate micro-integration in every case. By means of a careful policy of small-group integration in basically homogeneous neighbourhoods, heterogeneity can result.
Therefore, it may be possible to integrate one, two or even three households of different racial backgrounds in a predominantly homogeneous neighbourhood to give it a heterogeneous atmosphere. This is possible only after careful consideration of the goals of such action.

In addition, a number of other factors including dwelling location, neighbourhood planning and acceptance by other residents must be considered. Micro-integration is therefore feasible only when there are few significant class differences among those involved or when, perhaps, the groups to be integrated are of a higher status than the groups with whom they are to live.

The Importance of Physical Design
An empirical study prepared in 1971 for the Massachusetts Housing Finance Agency (MHFA) reported the effectiveness of Massachusetts housing legislation, which required that 25 percent of in all housing developments financed by the MHFA be made available through Government subsidy programmes to low-income tenants. As many tenants as possible were to come from minority groups to ensure not only an income mix but also a racial mix. The study, which compared a number of MHFA housing developments with other developments, showed that MHFA tenants (both renters and home owners) were far more satisfied with their housing developments than were residents of comparable developments built for the private market.

The researchers investigated whether this high level of community satisfaction was a result of income and racial mix or other factors. Levels of satisfaction were found to be directly related to the physical development of the areas, satisfaction was related more to neighbourhood design, development, management and maintenance than to population characteristics such as income and racial mix.
Relationships also existed between satisfaction and the characteristics of neighbours. The most significant characteristics of neighbours were that they were friendly, well-behaved and similar. These issues of management, maintenance and planning were also found to be important attributes of satisfaction in the Bournville study (Sarkissian and Heine, 1978).

2.3 "Defensible Space" and Social Mix

A somewhat different perspective on the issue of mix within housing estates was provided by Oscar Newman in *Defensible Space* (1972). From his study of territoriality and social problems in high-rise and medium-density housing estates in New York, Newman suggested that mix is an unworkable concept which can lead to conflict in the residential environment. He proposed that mix does not work either in terms of social class or of lifestyles. He cited examples of homogeneous communities where the poor quality of the housing environment led to conflicts both among residents and between residents and managers. Conflicts developed with such rapidity and force that the residential environment became intolerable. In his opinion, the introduction of a further variable, that is, a mix of people with different lifestyles, aspirations and backgrounds, would not improve the social environment of these poorly designed developments.

Suttles (1972) concluded, however, that the most significant factors affecting resident perceptions of low-income areas were relations between neighbours and with people in other communities and whether neighbours saw their neighbourhood as an area of self-interest (see also Rainwater, 1970; Keller, 1968).

2.4 Selling Social Mix

One large American study has looked at class integration in the public sector with interesting results. Smookler's study of 3245 residents, conducted in fifteen new suburban communities in nine American States, analysed the consequences of class integration policies for residents and the housing market (Smookler, 1976). Seven of the communities had adopted policies of class integration and eight had not. The researcher found that:

> . . . class integration is not a chimera. Many new suburban communities have integrated without negative market impact. Not only is class (and racial) integration
> politically and economically feasible, the data shows that integration is beneficial for low income families. Based on low-income residents' evaluations of their community and personal life components, class integrated communities provide an excellent living environment. The key factor which appears to distinguish between those communities which have implemented integration policies and those which have not is the developer's perception of the market. In effect, the developer creates the market. If there is a commitment to integration policies, they can be implemented in almost any area.

Smookler's findings indicated that honest advertising attracted self-selected middle-class and upper class residents who supported class integration. In addition, people who lived in class-integrated communities experienced an attitude change, becoming more positive toward integration.

2.5 Social Mix and Social Conformity

Often simplistic, middle-class-nuclear-family ideals are used in the planning of new towns and suburban estates. Even in socially mixed communities such as Rouse Corporation's Columbia in Maryland, diversity is allowed but "controlled". Lynne Burkhardt used ethnographic techniques to evaluate the success of the planned economic and racial integration in Columbia. She found that residents maintained many of the ethnic, racial, class, religious, marital status and age divisions found in American society but that Columbia had become a good working example of a pluralistic community (Burkhardt, 1981).

2.6 Other Studies

An important Canadian study was conducted for a doctoral thesis by Ann McAfee (1975), an experienced urban analyst, who has been for many years a senior housing planner with the City of Vancouver. Her research revealed some interesting guidelines for the staging of mixing:

If a variety of income groups are to be accommodated in an area it is recommended that no one income group be housed before the others. First residents will establish prior claims over later residents' expected behaviour patterns. As the area grows newcomers of household types already represented in the area are seen as less of a threat to neighbourhood stability than is the introduction of another household type (McAfee, 1975:211).

A United Nations Study (1978) examined goals for "social integration" and summarised the research findings on social integration by means of housing programmes. The report comments that "socio-economic interpretation in housing has not been achieved with as much success as racial integration," but does

conclude that the outlook for socio-economic integration may not necessarily be negative. The quality of housing and neighbourhood services is a very important means to encourage resident satisfaction in integrated neighbourhoods (United Nations, 1978:13).

Australian Research

In a study in an Adelaide suburb with a mix of ages and tenures, researchers from the public housing authority found that some interaction took place among people living in different housing types, but only among those who could be regarded as long-term residents (Knapman *et al.,* 1975). The study concluded that if any of the claims for social mix are valid, mixing does not occur except on an occasional or random basis in a `heterogeneous' suburb such as the one studied.

Lewis' (1975) Canberra study made a significant contribution to the understanding of social mix. After studying several suburban locations with different population mixes, he concluded that social mix in Canberra had not failed: the policy had no significantly detrimental effects, although mixing was very gradual and probably not perceived by most Canberra residents. Lewis found a high level of mixing among different sorts of people in particular locations. Manual workers in a mixed area tended to have far more social contacts outside their employment group than a similar group in a more homogeneous area. Social contacts tended to be upward in nature rather than downward. That is, manual workers were more likely to have white-collar social contacts than vice-versa. In general, Lewis' findings provide support for the concept of social mix.

In the mid-1970s and early 1980s Adelaide the focus of a significant amount of research on social mix (see Etherington, 1974, 1975 and Lambert, 1977). Brennan (1974) examined social mix at Elizabeth, Adelaide's new town, citing Michael Jones's study of housing and poverty in Australia, noting "the massive cost of subsidizing middle-income groups incurred by the South Australian Housing Trust so as to get mixed communities." Acknowledging the political and ethical issues underlying tenure mix policies, Brennan concluded:

That it [mixing] can be done is not in doubt; that something in that direction should be tried is widely accepted. The real question is whether the benefits, with relevance to poverty or any other problems, are worth the political and economic price. And, if they are, whether the choice would be the ethical one to make (Brennan, 1974:95).

A 1981 thesis by Josephine Schumann (1981) analysed social mix in inner Adelaide, using a network analysis approach. She examined how the social patterns found within a mixed area are different from, or at variance with, the findings of network analysis for relatively homogeneous areas (Schumann, 1981:28). Looking at the Australian research literature, Schumann highlighted the equity and resource allocation arguments for mix: it is seen as an "opportunity to equalize access to scarce resources in the city" (Schumann, 1981:7). Research by Adelaide geographer Blair Badcock has argued, however, that mixed residential areas do not always achieve the desired results in terms of diverse school populations, a fact supported by UK research. Research on the satisfaction of working-class residents in mixed developments is inconclusive (Schumann, 1981).

Looking at the *functional* arguments, Lambert (1979) showed that a policy of social mix in new housing areas may not always be the solution to cyclic redundancy and underutilisation of services and facilities. Rather, a small group may not be able to justify provision of specialised services and facilities. Pugh (1978) highlighted the complexities involved in making social policies work in economic terms. He argued that some of the aims of residential mix can be achieved only "in mutuality with the co-ordination of investments...." That is, all the questions about urban services and redistribution -- resourcing, accessibility, intergovernmental finance and land development policies -- need to be part of any debate about residential social mix (Pugh, 1978:36-37).

Of course, there is always the difficulty of *maintaining* the ideal mix. As Lambert's (1977) Adelaide study showed, it may not be possible to maintain a specific social mix, given the mobility of some groups. Heraud (1968) also highlights the difficulty in preserving a specific social mix with regard to three factors: area migration patterns, mobility between classes, and fertility and mortality rates.

A number of studies reviewed by Sarkissian and Heine (1978) and Schumann (1981) argue that the experience of living in a neighbourhood for a long time, where one has relatives, friends and acquaintances nearby contributes to a sense of community and of personal security (Young and

Willmott, 1957; Willmott, 1963). Interestingly, Bryson and Thompson's Australian research (1972) indicated that the time element was important for the first two years and then lost significance as a factor.

Among recent studies is Braddock's 1979 study on "Population Dynamics and Social Infrastructure" for the Australian Housing Research Council. Spelling out the implications for dwelling mix, with respect to the operations of the South Australian Housing Trust, she arrived at the following guidelines:

(1) Separation of public rental estates from other dwellings aggravates problems of social status distinctions. Different housing types can be integrated through increasing the variety of rental dwelling design, landscaping, and allocation of the same types of housing to rental and sale applicants.

(2) If large estates of rental housing continue to be built, special attention must be paid to the physical design of the boundary between house tenure types, and to allocations to dwellings on the boundary.

A 1980 study in Canberra looked at the changing perspectives of newcomers to that city. The reactions of thirty families who migrated in 1976/77 were assessed, providing information about the following factors: social mix, building block size, building covenants and government houses. It was shown that attitudes towards the advantages and disadvantages of social mix were significant in newcomers' abilities to adjust to a new home (Jones, 1980:85-89).

In 1978 a joint CSIRO-AHRC seminar was held in Melbourne to discuss social mix as a planning tool (Gribbin ed., 1979). One of the important issues raised was that those in the weakest position in the housing market may be concentrated into residential areas which may get a reputation which will increase turnover. This could lead to a concentration of those who are least likely to subsequently improve their social and economic position (Gribbin in Gribbin, ed., 1979:74).

Gribbin found that in a situation where there was marked disparity in the relative social standing of public housing tenants compared with others in the surrounding neighbourhood, the greater the visibility of the tenant, the more likely she is to perceive discrimination and stigma (Gribbin, 1979:98). The results of this study have clear implications for a policy of reducing the visibility of public housing, and especially for reducing the size of public housing estates.

2.7 Recent Empirical Studies

Minto Post-occupancy Evaluation
A post-occupancy evaluation (POE) conducted in southwestern Sydney in 1983 for the then New South Wales Housing Commission addressed just this issue. While attempting to assess the degree of congruence (or "fit") between public tenants' needs and the medium-density outer suburban housing estate where they lived, the study revealed that one street, in particular, had gained the reputation for housing those who had few other choices. or who acted without complete information (Sarkissian and Doherty, 1987).

In answer to a number of questions about "residential social mix", residents overwhelmingly supported the view that a district is better with a `mixed" rather than a 'similar' population. Nearly two-thirds of respondents felt that a mix was more acceptable. When asked the question "should Housing Commission and private units be mixed?", a smaller percentage of respondents felt that a mixture should occur (56 percent). When asked how many Housing Commission units should be grouped together in one estate, there was quite a wide dispersion of views. However, tenants overwhelmingly voted for the single dwelling. While 21 percent stated that only one unit at a time should be located in a mixed estate (that is, a "salt and pepper" scattering of public dwellings), 13 percent felt that two units should be sited together and 18 percent felt that three to four units were acceptable. Only one percent felt that more than 40 Housing Commission units should be included in a mixed estate.

When asked how many units should be grouped together, an overwhelming response was for one at a time (41 percent). An additional 48 percent felt that between two and four units would be acceptable. This is a very strong statement about the stigma associated with medium-density public housing where large numbers of units are clustered together (Sarkissian and Doherty, 1987:38).

Mixing Older People
In an annotated bibliography Forsyth (1987) reviews studies of age-segregation and comparisons of segregation and integration. These studies generally showed that both mixed and unmixed communities had benefits and problems. In terms of satisfaction what mattered most was whether older people had chosen to live in that particular type of community. Forced movers, or people stuck in a kind

of community which they disliked, were generally less satisfied, highlighting the importance of choice for older people.

In a questionnaire survey conducted in Metropolitan and country centres in Victoria and New South Wales in 1988, 388 respondents in twenty public sector and resident-funded retirement villages were interviewed to determine both attitudes toward tenure mix and mixing activities (Sarkissian Associates Planners, 1988). Village managers were also interviewed, discussion groups and in-depth interviews held with tenants, and extensive site assessments were conducted.

In this study almost all the findings confirmed previous empirical research uncovered in the literature review. The concept of mixed-tenure villages was accepted by at least half, or more, of the residents of public sector and private sector retirement developments. The rejection of the concept was based on a belief that owners and tenants were too dissimilar. Old stereotypes persisted and were at the source of negative opinion on mixed-tenure villages.

No direct and systematic links could be found between personal characteristics such as age, sex, last occupation and so on, and acceptance of the idea of tenure mix. The only factor which appeared to influence attitudes on tenure mix was a professed belief in moral and religious values.
Private villages with a professed Christian outlook generated a more favourable response to the idea and the practice of mixed-tenure villages.

Supporting other research findings, respondents felt that mixed villages should start mixed from the beginning. Residents of either tenure were highly unlikely to welcome a new form of tenure in an established village.

One of the most important findings was the absence of significant differences in satisfaction between respondents living in uniform-tenure villages.

Propinquity alone did not necessarily enhance interaction between residents. The extent of social interaction did not depend on perceptions of homogeneity and attitudes to tenure mix. Residents of serviced dwellings showed a higher acceptance of tenure mix than those in self-care dwellings. Owners were in general more aware of the existence of social mix than tenants. Personal characteristics and housing background did not directly influence the acceptance of mixed-tenure villages. But moral and religious values did so.

The False Creek Study

Jacqueline Vischer's "Social Mix and Environmental Design":

Vischer's "Exploration of a Contemporary Concept" (1986) offers one of the few recent explorations of the concept of social mix and its implications for environmental and site design. Looking at contemporary interest in planned social mix, Vischer identifies three areas of urban policy planning, focussing generally on the North American experience. The first is the trend to integrate subsidized units into housing developments in order to avoid "the undesirable side-effects of mammoth public housing projects." The Massachusetts study cited earlier is given as an example.

The second area is the change in the former socio-economic homogeneity of suburbs to include a more mixed demographic profile. The question is raised about how much social and economic diversity can be introduced without detracting from "the desirable social homogeneity which first attracted families to the suburban environment."

The third area of interest identified by Vischer is focused on inner-city neighbourhoods. In these areas housing planners and policy analysts "are being required to formulate standards for a desirable degree of neighborhood diversity" (Vischer, 1986b: 316).

Vischer's article asks some pointed questions about the concept of social mix, which are summarised below:

- How can a unit of measurement be defined?
- What does 'successful' social mix mean:
  - Achievement of a quantitatively "balanced community"?
  - Maintenance of this particular mix over time?
- How much mix is mix?
- What level of environment should remain homogeneous and where should heterogeneity occur?

- To what extent will residents accept and tolerate mix?
- Do residents actually derive "social and cultural enrichment" from a more diverse social environment?
- Do people who live near each other actually 'mix'?
- How much mix, at what scale, has positive effects, and for whom? (pp. 317-318)
- Which elements of spatial organization and physical features contribute to satisfaction?

The second part of Vischer's article summarises results of a post-occupancy evaluation of a socially mixed housing development, False Creek, in Vancouver, Canada, which began in 1975. In this development, the planners' intention was to achieve population diversity and to provide residents with both individual privacy and a shared sense of community, through the design of the physical environment. Christopher Alexander *et al.*'s *Pattern Language* (1975) was used as a guide. The three most significant social mix patterns followed were:

- a social mix of household types and income groups
- an enclave concept of clustered housing, and
- a hierarchy of open spaces.

The development has been widely discussed in the research literature and is regarded as one of the foremost examples of medium-density housing established on social planning principles. A 1984 article by Vischer in *Plan Canada* summarises the relationship between planners' intentions and residents' reactions, focussing on the key social mix issues: community and privacy (Vischer, 1984). When the study was conducted 55 percent of residents were owners and 45 percent renters.

Vischer identifies the importance of the physical environment as a mediating influence on residents' behaviour. The site plan, architecture and physical setting appear to be "major determinants of resident compatibility in a mixed development". "Physical features of the environment can modify the intensity of intergroup contact, can emphasize or de-emphasize social and income differences, can provide a common source of pleasure or annoyance, and can foster individual and group pride." (p.3 18) Perceived density influenced residents' tolerance of social mix. In other words, if residents were satisfied with their physical environment, and if subsidized and unsubsidized housing were of similar quality, they tended not to perceive social and lifestyle differences

Vischer's survey results highlight some of the limitations of applying a social mix approach identified in the first part of this article. "The clearest response from the survey" is that social mix "is not a high priority to residents, either as a source of concern or as a source of satisfaction. While different social groups did exhibit a tolerance for one another, there is no strong indication that they actually mix outside the context of their immediate neighbours and the group they moved in with. As in Smookler's (1976) study: "Most residents knew the development was mixed before moving in, so households with reservations about mix probably did not move in in the first place" (Vischer, 1984:324).

While tenure differences affected attitudes toward mix the study did not find enough evidence to support the implementation of "fine-grained" mix. To achieve fine-grained social mix involves "cumbersome and time-consuming" administrative processes which are not seen as worthwhile in terms of residents' social enrichment (Vischer, 1984:324).

The following findings from False Creek are important if contradictory:

- Owners and renters were more mutually tolerant if they occupy different areas of the site.
- Child-oriented households should be somewhat screened from adult areas.
- While attempts to achieve fine-grained mix are probably not worth the effort, if different social groups are too large and too separated, what results can hardly be called a mix of development.

Some of the costs identified are the following:

- The extra administrative time required to manage and implement a planned mixed development.
- The necessity that the quality of housing be of a comparable standard for market and non-market housing, so that residents cannot be stereotyped on the basis of house appearance. The necessity of a high-amenity location to ensure that upper-income households are attracted. This means high land costs (Vischer, 1984:324-325).

- This will necessitate substantial subsidies for low-income residents, high land prices and good-quality housing.

Interestingly, large gaps exist in the empirical literature from North America. This may in part because in the United States, tenure mix is often racial mix. There has probably been a reluctance to evaluate integrated housing developments, in case the results may not justify in quantifiable social and economic terms the investments and commitment to equity principles embodied in the development.

3.0. Guidelines for Developing Socially Mixed Communities

The literature on social mix is thus inconclusive and often contradictory. There are arguments for and against mix across the political spectrum. It is apparent that mix can be achieved, but the benefits and costs are disputed. It appears that, even if mix can be achieved initially there is no guarantee that it can be maintained. Nevertheless, planners have tried to apply principles of mix in the past two or three decades. We will review some lessons from two important cases and conclude with a set of guidelines for the Australian context.

On the difficult subject of providing guidelines, Herbert Gans has been the most direct and specific. Gans was consulted in the 1960s by the developers of Columbia, Maryland, to provide planning guidelines. On the subject of mix, he advocated block (i.e., city block) homogeneity, as studies have shown that the city block is the major social 'arena' and should therefore be emphasised. Second, community heterogeneity was recommended if block homogeneity could first be achieved. This requirement is related partly to achieving a reasonable local tax base and providing schools of a high quality in a system where local taxes finance educational facilities (Gans, 1968:189-191). Gans advocated the artificial stimulation of neighbour contact in his early writings.
Vischer's 1984 conclusions indicate that developing a mixed community on the basis of "simple directives", such as those in *A Pattern Language* is likely to cause problems. Rather, "the design of an environmental context for a successful social mix involves a delicate balance between privacy and community, a balance that the design of open space can successfully mediate. But achieving such a balance requires a decision-making process that is . . . complex and requires . . . careful thought and subtle innovation...."

While social mix guidelines have been used in a major Canadian housing development with success (see Vischer, 1984 and 1986), little work has been done to "operationalise" this housing theory in Australia. This is not surprising, in view of the often contradictory findings of empirical research and the difficulties of cross-cultural comparisons. One of the few attempts in Australia to provide site-specific guidelines for social mix in housing was the study conducted by Taylor and Sarkissian for the Victorian Ministry of Housing (Sarkissian and Taylor, 1987). That study, for the mixed-tenure William Angliss redevelopment site in Footscray, Melbourne, spelled out by means of guidelines for site planning and design how the Ministry's policy of tenure mix should be implemented. The guidelines paid particular attention to boundaries between tenure types and allocations to dwellings on the boundary between the Ministry of Housing (public housing) part of the development and the dwellings built on the site for private owner occupiers.

Another study culminating in a manual of guidelines was conducted for the Australian Housing Research Council in 1987-88 (Project 166), which has been discussed above. Keyed to another manual for the planning and design of retirement housing (Sarkissian and Forsyth, 1986), the guidelines address: market analysis; assessment of sites and locations; feasibility assessment; management; legal and financial packages; resident sales and allocation; marketing; and maintenance for villages with a mix of tenures.

3.1 Some Preliminary Guidelines

From this discussion of the literature on social mix it is obvious that the factors affecting the success of mix are very diverse. Several guidelines can, however, be proposed in the hope that this work will generate further debate and experimentation:

1. Be prepared to use non-market forces to initiate and maintain mix.

2. Use salt-and-pepper mix only in spot-purchase situations; otherwise cluster households in groups of approximately 15 to 40 units.

3. Take care to avoid creating homogeneity through deprivation, such as in some low-income areas, particularly on large estates.

4. Ensure, where possible that the final mix of the development is reflected in the early stages, to ensure that there are no "surprises" later on.

5. Plan the mix to ensure that residents share at least some values or lifestyle characteristics. For example, if income mix is proposed, provide more homogeneity in, say, family type or tenure.

6. Pay careful attention to physical design. Good physical design -- including site planning, landscaping, provision of private open space, views, and housing design -- increases satisfaction and decreases negative perceptions of mix.

7. Ensure that different population groups are not distinguished, and possibly stigmatized, by different housing types or poorer quality finishes and maintenance.

8. Pay careful attention to the design of boundaries between populations, particularly populations with lifestyle differences like families with young children and retired people. Protect vulnerable residents from inappropriate or annoying behaviour by neighbours and others by means of buffers and other design solutions.

9. Ensure that community facilities and infrastructure are provided to serve all members of a "mixed" community. However, as lower income residents have fewer resources to leave their residential neighbourhood, the first facilities should be targeted toward those groups and available early in the life of the development.

10. Be particularly careful not to force vulnerable groups, such as older people, into mixed housing without offering real alternatives.

11. Ensure that all prospective residents are fully informed of the proposed mix, by means of appropriately worded material which avoids stereotyping, in all information provided about the development.

12. Be prepared to spend extra time in planning and consultation and extra money for high-amenity locations and higher standards of construction and finishes than might currently be acceptable in public sector housing.

13. Tailor all approaches to the local situation, through consultation with neighbours and new residents to reduce opportunities for friction.

4.0 Concluding Comments: A Research Agenda

The guidelines suggested above could form the basis for a research agenda for implementing and evaluating social mix strategies. To turn the theory into practical advice for planners and designers, more work is urgently needed: both systematic research and careful development of guidelines. The Footscray Study of the William Angliss site (Sarkissian and Taylor, 1987) is an attempt to do this on one site. That study raised a number of concerns which need to be addressed in a future work. They are summarised below:

4.1 The Limits of "Social Mix"

Mere physical proximity of dwellings will not necessarily encourage people of different values, backgrounds, lifestyles and socio-economic levels to interact in meaningful ways.

4.2 Mixing People, Not Dwellings

The mixing which will occur on any site will be between people -- not dwellings.

4.3 The Issue of "Protection"

Recommendations for some sites, particularly in high-crime neighbourhoods, need to be based not so   much on creating (or forcing) opportunities to mix with public tenants or private owners/tenants or   private owners/tenants as in ensuring that requirements or a safe and comfortable life in one's respective residential area are protected. Thus, it is important to pay particular attention to the needs of the most vulnerable groups. While interaction with neighbours should be encouraged, one must also acknowledge that some neighbours do not act in appropriate ways at all times. Some negative human behaviour is to be expected in any neighbourhood -- be in private or public.

The Permanency of Public Housing
It is important to acknowledge the lack of mobility of both public and private residents who will eventually live on any site. The permanency of public housing tenure is now well documented: tenants simple cannot "trade up" to owner-occupier status. Private rental is not an attractive or secure option.   Owner-occupiers, as well, find that lending practices and high interest rates will make trading up to a larger house increasingly difficult. We can assume that many of the new residents will live out their lives in a mixed-tenure housing development, at least until dwellings become too large to manage easily.

4.4 Limits to "Pepper-and-Salt" Mix

A fine-grained or "pepper-and-salt" mix of either public and private housing (tenure mix) or of household types within either the public or the private areas is not generally supported. Scattering has   not been shown to work except in spot-purchase situations. Rather, provision of clusters of housing for   different household types is supported. Each cluster will require a separate identity, provision of semi-   private communal open space associated with the clusters of units and links and buffers between the clusters, where appropriate. The key issue is not so much encouraging interaction as protecting   vulnerable residents from inappropriate behaviour by neighbours and others.

4.5 The "Moral Debate"

Both policy formulation and research on socially mixed communities in Australia need to address the question of whether in formulating policies for social mix we are planning for the short-term satisfaction   of residents (especially owner occupiers) or for the long-term benefit of the wider community. Multiple evaluative criteria will need to be used in any assessments; there is a great need for longitudinal research. The costs and benefits of tenure mix which has been accomplished by spot purchase of housing for public tenants in inner city suburbs such as Newtown and Redfern in Sydney should be closely studied.

4.6 Future Research

The Australian Housing Council should consider updating earlier Australian studies of social mix in Australia by incorporating the findings of studies explicitly on mix (such as Braddock, 1979; Sarkissian Associates Planners, 1988). More importantly, the Council could consider funding evaluative empirical studies of planned residential mix in sites such as Golden Grove in Adelaide, joint ventures with private enterprise (there are several by the Ministry of Housing and Construction in Melbourne) and mixed- tenure developments for older people (several have now been developed in Sydney).

If Australian planners are to continue to attempt to understand -- and consciously implement -- policies of residential social mix, we need a much better understanding of the long-term costs and benefits of   this hardy perennial. While it is important that it not be crowded out of the garden by the weeds of short-sighted planning, it must nevertheless earn its place as a feature of the modern Australian residential landscape.

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NOTES

1. This paper continues the work begun in two previous studies tracing the origins and development of this concept: Sarkissian, 1976 and Sarkissian and Heine, 1978. The authors acknowledge with thanks the assistance of David Eversley in the original work, especially the work on Bournville. The generous assistance of Sevan Sivaciyan, Kevin Taylor, Pamela Esdaile and Ian Bowden in preparing the material on tenure mix in retirement housing is also gratefully acknowledged.

2. American urban renewal policies, especially those originating in the 1960s and 1970s, have been strongly biased in favour of racial and "class" mix in neighbourhood redevelopment. While ethnic mix is now emerging as a major issue for residential planners in Australia, racial mix has not been the subject of wide public debate.

3. The efforts of the Aboriginal Housing Company in Redfern, Sydney, to maintain their position in the face of pressures to gentrify that neighbourhood is an interesting case study. See Wendy Sarkissian and Colin James, *Housing for Aboriginal People in Redfern*, March 1986 and Technical Assistance Group, University of Sydney and Sarkissian Associates Planners, *Planning Report for Redfern West*, November 1986.

4. For criticism of the results of extreme forms of heterogeneity, see: H.J. Gans (1961). "The Balanced Community: Homogeneity or Heterogeneity in Residential Areas?" *Journal of the American Institute of Planners*, XXVII: 176-184; H.J. Gans (1962) "Review of the Split-Level Trap by R.E. Gordon *et al.*," *Journal of the American Institute of Planners*, XXVII: 47-49; and N.N. Foote *et al.* (1960). *Housing Choices and Housing Constraints*. New York: McGraw Hill: 203-207.

5. Similar approaches are now being considered by local governments in Australian capital cities. A recent study for the City of Adelaide reviews linkages and other partnership approaches: W. Sarkissian, M. Sidhu and M. Williams (1989). *At Home in the City: Housing for Low-Income and Disadvantaged People in the City of Adelaide*: Sarkissian Associates Planners for the City of Adelaide.