Lifestyle Neighborhoods: The Semi-Exclusive World of Rental Gated Communities

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ABSTRACT

This study looks at characteristics of rental gated communities in the United States from a national perspective and based on a case study of four Southwestern Counties, Riverside County and San Bernardino County in California, Maricopa County in Arizona, and Clark County, Nevada. Tenure differences between owned and rental gated communities are compared. The study also debates who actually benefits from rental gated communities and what that effect that has upon the community. This analysis is done by assessing whether minorities experience higher housing opportunities in rental gated communities newer, fast growing areas as the study area. Descriptive statistics of rental gated community characteristics are presented and neighborhood diversity indices are analyzed. The study finds that rental gated communities are much like their owned gated community counterparts and that new housing markets do not present better housing opportunities (at the neighborhood level)for minorities, particularly those neighborhoods with more rental gated properties present. Policy implications are discussed.

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Preface

There have been several books and dissertations written about gated communities since the mid 1990s. Thus, it is fair to question what the need is for yet another study on the subject. The simple answer is that researchers on this topic focus primarily on the owned gated community sector rather than exploring whether there are in fact rental versions of these properties and if there is anything different about them. But I am not too sure that many people, including researchers, recognized that developers were even building rental gated communities in any great numbers.

I, too, am guilty of not being particularly aware of these types of properties. Earlier in my career as director of housing policy and practice at the Urban Land Institute (about 10 years ago), I remember one of the multifamily developers telling me that they were in the process of building a gated master planned rental community in Rancho Cucamonga California. While I thought it was an intriguing idea, it struck me as something that was unique and not particularly commonplace. In addition, the international literature on gated communities makes passing reference to a very small number (maybe 1 or 2 properties) rental gated communities but lumped them together rather than determining whether this was widespread or again a small proportion of the rental stock.

The 2001 American Housing Survey (AHS) changed all this because the survey asked questions about gates and walls for the first time. The AHS made it evident that enough rental gated communities existed to pursue as a separate area of inquiry, particularly after the Sanchez, Lang and Dhavale (2005) study highlighted some of the unique dimensions to this housing. When I decided this was to be my dissertation topic and told people what I was studying, I still got very quizzical looks from people because most were not aware that these type of rental communities even existed.

The explosive growth of gated communities over the last two and a half decades would predict that most Americans know at least one person who lives behind gates. With popular conceptions of gated communities conjuring images of neighborhoods with owned single-family homes or condominiums. Thus, one of the more interesting aspects of studying what has been called rental gated communities (for lack of a better term) is that they seem to be invisible to most people even in areas of the southwest where people pass them everyday. I found this to be the case among almost everyone I know even among policy faculty in the southwest that most might expect to be more observant than the general public and who passed these property types everyday. While this might be a partly a result of the age of those I queried (that is, they are not renters for the most part), this still puzzles me as to why these properties are so well camouflaged in the urban fabric despite the proliferation of rental gated communities since about the mid 1980s.

I should also admit that I had never lived in a gated community although I have visited many (both owned and rental gated communities) across the country as part of my personal and Urban Land Institute experience. So to better understand why these communities are not included in the gated community debate and to gain more insight into the experience of living behind gates, I lived in a rental gated community in the Phoenix metropolitan area for six months in 2006.

One of the things I first noticed besides the broken gate for cars was that the entire apartment complex felt like it was under lockdown. To go from one part of the property to another (either to the pool area, workout room or walkways) required a keyless remote to open a metal door that buzzed and slammed much like jail cells do. The racket it caused was a constant reminder that one lived in a gated community. Indeed in my site tours of apartment communities in Phoenix and in the Inland Empire of California, I found the same types of features in many of these complexes. In owned gated communities, residents are somewhat more removed from the gated noise because

their houses are further away from the gate and the pool. Thus, the density of apartment complexes made me more acutely aware that I was behind many security barriers.

Another observation I made when undertaking several site visits of apartment complexes in California and Arizona is that there appears at some level to be a thin veneer of housing opportunity. For instance, as I asked to speak to several property managers to get a basic feel for what rental gated communities were like, I inquired as to what the ethnic makeup of these communities was like. Although I could tell by sight which complexes were diverse, all of the leasing agents I asked this question calmly responded that they do not keep records on ethnicity and then pointed the Equal Housing Opportunity (EHO) sign hanging prominently on a nearby wall.

I also asked how the application process worked. I was told that to qualify for these communities involved running a credit score and a monthly income that was about three times the monthly rent for the unit the prospective tenants were interested in. If the property was older or had some subsidy attached to it, the income threshold would be lowered to 2.5 times the monthly rent. The leasing agent would then say, (sometimes with a wry smile) after pointing to the EHO sign that anyone who qualifies under those income guidelines would be leased an apartment—certainly not the most cordial way to start a relationship. Although it was very subtle, these responses seemed somewhat discriminatory despite the lip service to the EHO sign.

I also found other similar types of subtle discrimination as I visited these apartments. Before I identified myself as a researcher, I was asked if I wanted to look around the property. I said not initially but in the process of waiting to talk to the property manager, I noticed that minorities who did look at the apartments were asked to leave a license in exchange for a key more often than prospective white tenants were. As Turner and Ross (2005:82) note "it is rare today for a real estate or rental agent to blatantly "slam the door" on a Black or Hispanic customer. I have to say it was a little unsettling to see what this looks like in person.

Another dimension to the field work was to witness that housing opportunities were not just limited by race and ethnicity but also income. For instance while waiting for one property manager in a town in Southern California, I started to talk to other prospective tenants. One of the other people waiting noted that she was a teacher in a nearby town and could not afford to rent, much less buy a home, in the wealthier town where she worked. This teacher was young and certainly not poor but was affected by the rise in housing costs over the last decade in Southern California. This affordability situation, while eased somewhat now in this current economic climate, was exacerbated by the rapid conversion of apartment complexes, particularly gated properties, into condominiums. Thus, the pool of rental units turned condo also turns into an opportunity for further discrimination if minorities and teachers are unable to purchase these units. South and Crowder (1997) argue that high vacancy rates in a metropolitan area should provide more housing opportunities for minorities. The few anecdotal situations of diminished supply and subtle discrimination I witnessed, suggested that what I found empirically was on the right track.

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I would also like to thank the Department of Housing and Urban Development's Office of University Programs (OUP) for awarding me an Early Doctorate EDSRG) grant which made it possible for me to live in the Phoenix area for 6 months to get a better feel for what rental gated communities were like. It would have been less informative to stay just in Virginia where the incidence of these developments is still relatively low.

I would also like to thank Ed Blakely for more than just agreeing to be on my committee (but for which I am very grateful) but for his help when I was in the Inland Empire in January 2005. Ed offered great suggestions for what to look for and people to talk to in the Inland Empire about rental gated communities.

I would also like to thank Casey Dawkins at Virginia Tech for his help with the technical details associated with using segregation indices.

And last but not certainly not least, I thank the other members of the doctoral committee, Tom Sanchez, Chris Nelson and Paul Knox for their guidance and support on this dissertation.

Chapter 1
Introduction

The term "gated community" is now a cliché among planners, politicians, developers and the public, alike. But, the underpinnings of gated communities intuitively appeals to many who equate it with an archetype of what community should be in terms of creating a sense of place, increasing participatory democracy, providing safe and private residential spaces, designed to promote a neighborhood vitality not found often in other neighborhoods. The act of separating neighborhoods from each other with physical barriers may well confer these benefits upon the neighborhood's residents but at the same time disassociates these individuals from the goings on elsewhere in the community. One of the more unfortunate side effects of gated communities is the segregative effects they heap upon those less fortunate who too would benefit from the interactions of their neighbors.

One of the themes of this dissertation is to debate who actually benefits from gated communities and what that effect that has upon the community. This will be determined, fundamentally, by analyzing whether minorities experience higher housing opportunities in newer, fast growing areas. More specifically, this study looks at gating to determine if it helps or hinders diversity. Emily Talen (2006) argues that planners "lack a clear understanding of the conditions that are associated with a diverse place." This study argues that planners are essentially ceding the opportunity to promote diversity by permitting gates.

Rather than focusing on homeowner gated communities that have already been demonstrated to promote segregation,[1] this study looks at apartment properties that are gated

[1] See for example LeGoix (2005) and Vesselinov, Cazessus, Falk (2007).

similar to their owned counterparts to investigate whether gating any property produces similar outcomes.

Gated communities are commonly defined as residential areas that are enclosed by walls, fences or landscaping that physically prevents entry. This definition also usually includes discussions of restricted access to all portions of the community from the surrounding community (Low 2003; Blakely and Snyder 1997). The next set of defining characteristics that are typically discussed are the self-governing ability of gated communities that have Homeowner Associations (HOAs) that function as private governments (McKenzie 1994, 2003; Blakely and Snyder 1997). Before the seminal studies of Sanchez and Lang (2002) and Sanchez, Lang, and Dhavale (2005), only passing references were made to apartment complexes that are gated.

Rental gated communities have much of the same characteristics of owner gated communities but also express significant differences between tenures that are detailed in Chapter 2. For instance, a difference observed from field work finds that rental gated communities are also part of larger master-planned communities. In these cases, the entire rental gated community complex (which may have hundreds of units) is considered to be but one "residence" under the governing are documents of the homeowner's association. In the recent past, rental gated communities are the preferred multifamily properties to have undergone condominium conversion, the progenitor of more owned gated communities. Thus, it is clear to see that rental gated communities are in the cross hairs of many different market dynamics and neighborhood shaping processes.

It is important to remember that rental gated communities are considered commercial properties much like retail and hotels. Fieldwork suggests that much of this commercial multifamily is sited similarly to other commercial properties, partly because of zoning and partly because apartments complexes need to be located in highly visible places with traffic much like a grocery store. Many times the immediate environment around these complexes is not as residential

as homeowned developments because of the placement on busy streets. Thus, at one level it is no difficult to see that gates do have the benefit of mitigating the intrusion of the abutting street. But in the end, it is sometimes difficult hard to see who really benefits from creating neighbors in this fashion.

Themes and Research Questions

This study fundamentally assesses who benefits from gated communities. I approach this by exploring broad themes often associated with housing availability, mobility and opportunity but more specifically in terms residential inequality. I also assess this by weighing in on whether gated communities contribute to or deter community cohesion. The research questions I ask here are how do the spatial arrangements wrought by rental gated communities influence the "geographic opportunity structure" in terms of inequalities and do new housing markets offer more opportunities for minorities to live in less segregated situations (Galster and Killen 1995; Crowder, Tolnay and Adelman 2001; South and Crowder, 1998)[2]? Is there integration occurring at the neighborhood level or are minorities in rental gated communities still segregated (Maly 2005)? Are reasons for increased integration/segregation due to new housing markets or general rental market dynamics? And finally, to what extent do rental gated communities contribute to the social distance between races and classes (Simmel 1909, Caldeira 2000, 1996; Wilson-Doenges 2000)?

The second chapter provides a general overview of national trends associated with rental gated communities. In order to better define rental gated communities, chapter two also detail the features that distinguish owner and rental gated communities. The chapter also provides a cursory

[2] I use the term opportunity structure in terms of how Galster and Killen (1995:10) define the geographic dimension of equal housing opportunity. In particular, they argue equal housing opportunity is the ability of a household to have equal access to reside in any metropolitan location that they deem most desirable. This definition also assumes that there is an equitable delivery of goods and services across the metropolitan area.

exploration of the policy issues associated with gated communities in general, some of which will be discussed in more detail in later chapters.

Chapter 3 considers to what degree the national trends are operating at a more local level. This chapter analyzes data derived from a unique database I developed for this study from various online sources and site visits that I am calling the Rental Gated Community Database (RGCDB). The descriptive analysis focuses on four Southwestern counties, Clark County, Nevada, Maricopa County, Arizona, Riverside and San Bernardino Counties in California.[3] In this chapter I compare the characteristics of gated rental properties to non gated rental properties in these metropolitan areas. For instance, I discuss the frequency of rental gated communities and the degree of subsidy for these properties and compare the age of gated and nongated rental properties. This chapter also looks at rent and income characteristics, types of security on these properties and how the properties are managed. This chapter also discusses the collection of data to probe the extent of Hispanic residents in rental gated communities and discusses the significant degree of gated rental properties catering to this demographic.

In chapter 4 I take a different approach to a literature review considering first a theoretical notion of why boundary creation is so socially important based on sociologist Georg Simmel's ideas on that issue. I then turn to weight benefits that gates and walls confer to residents and perhaps the communities where they are located based on an approach developed by sociologist and urban planner Herbert Gans (1972) in his article *The Positive Functions of Poverty*. This chapter, rather than focusing on the negatives of gated communities, looks at 22 positive dimensions of gated communities from economic, social/cultural and political/government perspectives.

[3] In this document, I sometimes refer to Riverside County and San Bernardino Counties collectively as the Inland Empire. While I mostly analyze the counties separately, it makes for better comparisons to other data reported at the metropolitan level that is comprised of both counties (Riverside-San Bernardino-Ontario, CA Metropolitan Statistical Area).

Because it can be demonstrated that gated communities do provide at least some benefits, the next chapter considers whether gated communities represent good community form or are they the harbinger of further community decline and alienation. To assess this, the theories underlying the "Community Question" are debated to reveal which urban theoretical tradition would best explain the growth and proliferation of gated communities. Barry Wellman, as a way to classify and to better understand the theoretical contributions of major urban and community sociologists developed broad categories of "Community Saved" or "Community Lost" to describe these theorists' perspectives. A theorist is grouped under the "saved" or "lost" category depending how they viewed the effects of modernity on community ties: The "Lost" theorists argue that modernity breaks down community cohesion. "Saved" theorists, on the other hand, counter that in spite of the alienating effects of modernity, community ties still remain although structured somewhat differently or even changed for the better. The ensuing discussion will be used to determine which theoretical tradition best captures the effect that the gated community phenomenon has on communities (Wellman 1979; Wellman and Leighton 1979; Connerly 1985; Lupi and Musterd 2006; Webber 1966; Suttles 1972). As will be argued, wrestling with these theories has led me to conclude that gated communities are a transitional community form that may in fact offer an opportunity for more community engagement and cohesion.

Based on promising trends over the last two censuses towards less segregation in large metropolitan areas, in chapter 6 I empirically analyze what some call "area effects" or the impacts that neighborhoods have on residents' life chances (Berube 2005). The most common way of assessing area effects is to measure various forms of segregation such as income inequality and residential segregation. This is important because, as John Logan put it, "the housing market and discrimination sort people into different neighborhoods, which in turn shape residents' lives…" (Logan 2003:33). After a brief background to using segregation indices, chapter 6 analyzes the

results of these calculations applied to the study area using a neighborhood level dissimilarity index referred to as Simpson's D. This will be followed by a regression analysis to see which variables, drawn from Simpson's D scores based on 200 census tract data matched to the RGCDB, predict the presence of gated communities.

The final chapter first deliberates on conclusions from the analysis and the policy implications from these findings. The chapter ends with suggestions for continuing exploration on this topic as well as directions for other types of related research.

Chapter 2

How the Other Half Lives: Overview of National Trends Rental Gated Communities[4]

The current literature on gated communities characterizes residents as mostly wealthy, fearful, white homeowners. It surprised the first researchers on the topic that many gated community residents live in apartments (Sanchez, Lang and Dhavale 2005). In fact, they find that renters are nearly 2.5 times more likely to live in walled or gated communities than those in owned gated neighborhoods. These renters are also much less affluent and are more likely to be Black or Latino. As a relatively unexplored dimension to enclaved communities, rental gated communities offer the opportunity to discover new insights into neighborhood dynamics.

The reasons for gating apartments represent a complex matrix of social processes not yet fully documented or understood. For instance, rental gated communities may be the device of choice worldwide to manage diverse social environments (Briggs 2002; Giglia 2003; Lemanski 2006; Billig and Churchman 2003; Caldeira 2000; Salcedo and Torres 2004) or to lower nearby homeowner resistance to multifamily and affordable housing (Lemanski 2006), or allowing minority groups access to homes that they might otherwise not be able to occupy (Crowder et al. 2001; South and Crowder 1998). These rental communities may serve to integrate land uses and races on a small scale but increases the social distance between tenures and people (Billig and Churchman 2003; Fischer 2003).

Chile, Brazil, Israel, and Mexico have had a similar experience using gates in relatively homogeneous populations (in terms of ethnicity not class) to decrease the physical distance between rich and poor in urban areas and to increase the social distance between those same populations

[4] A version of this chapter appears in *Housing Policy Debate*.18:3.

(Billig and Churchman 2003; Briggs 2002; Caldeira 2000; Giglia 2003; Lemanski 2006; Low 2003; Salcedo and Torres 2004).[5] Indeed, this checkerboard pattern of gated and ungated communities may be what integration looks like in a fast growing, urbanizing, diverse, and heterogeneous country.

While many of these observations are speculative, it does indicate that the findings by Sanchez et al. (2005) raised many questions about why rental gated communities exist, what their effects are on surrounding neighborhoods and how they differ from their owned counterparts. To set the context of a relatively unknown phenomenon, I begin by exploring the major themes and trends associated with neighborhood dynamics that are also of concern to gated community research as a whole. The themes of gated community demographics, crime, segregation, wealth and poverty concentration, and affordable housing will be discussed and then are assessed as to how rental gated communities differ.

Factors Leading to the Growth of Gated Communities

Community Cohesion

Research on gated communities centers on the loss of community in terms of maintaining or increasing community cohesion (Blakely and Snyder 1997; Lang and Danielsen 1997; McKenzie 1994, 2005; Barton and Silverman 1994; Blandy and Lister 2005; Atkinson and Flint 2003; Callies, Franzese, and Guth 2003; Fischel 2004; Grant 2005; Grant, Greene and Maxwell 2004; Grant 2004; Thuiller 2005).

This same literature considers the downsides to the wealthy separating themselves from the larger community. Wilson-Doenges (2000) finds that high-income gated community residents report a lower sense of community than their lower income non-gated counterparts. Yet gating

[5] Orange County, California is trending the same way as these less developed countries according to one study (Maher 2004).

increasing is not limited to the wealthy or homeowners as Sanchez et al. discovered. Another recent study by Kirby et al. (2005) documents that blue collar families will be found in homeowner gated communities in the Phoenix metropolitan area.

But by the act of isolating themselves from the surrounding town, gated communities are perceived by most observers as an impediment to maintaining the public realm and public involvement by those residing in gated communities. Studies have documented a growing demand for enclaves arising from several social currents centering on a perceived fear of crime, globalization and demand for more security that local communities cannot fulfill that will be discussed below.

Governing Fear and the Culture of Fear

Criminologists have documented a recent governing tactic of *governance-through-fear* where government encourages individuals to take on a large measure of crime prevention upon themselves. This according to these researchers represents governments' failure to control crime (Lee 2004). These tactics are a product and a creature of the *culture of fear* that preceded the rise of gated communities (Davis 1990, 1992; Maher 2003; Blakely and Snyder 1997; Low 2001, 1997; Wilson-Doenges 2000; Flusty 1997; Ellin 1997; Jencks 1997, 1993; LaGrange 1992; Greenberg 1986). Gated communities are but one among many approaches designed to increase security to combat the fear of crime but as Lee (2004:34) points out, "that the more we attempt to govern fear the more fearful we become."

The culture of fear particularly focuses on middle-class homeowners' obsession with safety and fear of crime (Davis 1992; Clark 1993). Davis (1992, 1990) even goes so far as to assert that the culture of fear results in a "militarization of space." Gated communities represent the physical expression of this fear. Indeed, some have dubbed gated communities as *the architecture of fear*

(Jencks 1997 1993; Ellin 1997; Marcuse 1997) creating a new *aesthetic of security* (Caldeira 1996) as part of a larger trend of *wallification* (Jencks 1993).

The fear of crime and the culture of fear have arisen in part because governments cannot adequately protect the population from crime to the level desired by residents. Municipalities have limited capacity to expand these services due to fiscal constraints and a changing political climate seeking to limit government (Hunter 1985; Lang and LeFurgy 2007). The failure of government to accommodate the security demands of their residents has lead to the governance of fear that diverts the burden of crime control onto citizens. This includes shifting the responsibility onto each individual who is expected to become a *fearing subject* whose civic duty is to look after their self and their property (Lee 2004). The proliferation of gated communities, as one of these means, appears in the wake of a variety of publicly involved self-policing efforts that have developed over the past 25 or so years that are briefly described here.

First, to effectively leverage smaller police forces there has been an increased emphasis on community policing. Community policing consists of strategies such as voluntary neighborhood watch strategies and crime prevention. Crime prevention includes both public education and utilizing many of Oscar Newman's idea of defensible space or CPTED (crime prevention through environmental design). A large part of the CPTED strategy includes physical barriers and "target hardening" devices such as gates, walls, and limited access systems (Felson and Peiser 1998; Newman 1972, 1980, 1995, 1996; Jeffrey 1971; Meck 2005; Robinson 1998; Greenberg and Rohe 1986). Gates are increasingly becoming the crime prevention device of choice according to a recent poll of apartment dwellers. Twenty-five percent these renters responded that gated community was one of the security measures they used to prevent crime (Apartments.com 2006).Newman's ideas of defensible space, while incorporating target hardening devices, also include having the residents

themselves be responsible for some self-policing by clearly defining perimeters and knowing who belongs.

Another related trend is that there is an increased level of spending on private police in large growing metropolitan areas. D'Alessio et al. (2005) and Barkan and Cohn (2005) find that economic inequality and racial prejudice account for the growth in private police spending, most often by whites. D'Alessio et al. (2005) in particular observe that as the relative size of Black and Hispanic populations grow in a metropolitan area, the bigger the size of private police forces. Indeed, Chiricos, McEntire, and Gertz (2001) find that the perceived risk of victimization is influenced by the perception that Blacks or Hispanics live nearby.

Lang and LeFurgy (2007) find that certain Sunbelt municipalities are encouraging the growth of gated communities, both owned and rented, as part of a larger process of shrinking government. A few communities that have only part-time mayors and councils, in fact, require new residential developments to be gated in order to alleviate municipal service responsibilities.

Real vs. Perceived Crime

There has been much discussion as to whether gates actually reduce crime. Blakely and Snyder (1997) observed that it was fairly easy to gain access to gated communities. They also point out that gated community residents may feel a false sense of security and leave their guard down. In addition, residents can never be certain that their neighbor will never perform a criminal act.

More recent newspaper accounts report that residents have become jaded about just how secure their community is (Overbeck 1997; Richards 1996). The reason is that entry is not always restricted because codes and access cards are not always controlled due to deliveries. In gated apartment complexes, many gates are only closed after the manager leaves for the day. Apartment

developers offer 24-hour restricted access as a luxury amenity. [6] There is also some speculation that perimeter walls may offer safe haven for criminals because police cannot gain immediate access to the wall and that walls may offer a place for criminals to hide (Blakely and Snyder 1997). Yet as many criminologists note with women and men both in the workforce, many houses are empty during working hours creating a situation that invites crime (Rengert and Wasilchick 2000; Felson and Peiser 1998).

This also points out that there are different public safety needs among different income classes living in gated communities. Wealthier gated communities, whether owned or rented, require surveillance because residents are largely absent during the day or the house is a second home (Rengert and Wasilchick 2000). These residents are willing to pay for private police forces merely for quieting anxiety about crime whether or not there is actual reason to be afraid.

Yet statistics kept of gated and ungated apartment complexes by the Glendale Arizona Police Department prove illustrative here. While there are more ungated apartments than gated apartments in the town, Table 2-1 shows that gated complexes summoned police (CFS or calls for services) more often than ungated apartments but on a per apartment basis ungated apartments tend to call police more often.[7]

Table 2-1
Glendale Arizona Police Call for Service First and Second Quarter 2005

Property Gated	Number of Apartment Complexes	Number of Units	1st Quarter	2nd Quarter	2005 Total CFS	CFS per Apt Complex (Total)	CFS per Apt Unit (Total)
Yes	26	6,651	1,703	1,423	3,126	120.23	0.47
No	139	18,586	5,469	5,517	10,986	79.04	0.59
Total	**165**	**25,237**	**7,172**	**6,940**	**14,112**	**85.53**	**0.56**

CFS=Calls for Police Service
Source: Glendale Police Department

[6] This observation is based on fieldwork in the Inland Empire, California and in the Phoenix, Arizona Metropolitan area and on Lang and LeFurgy (2007).
[7] What is not shown in this table is that the gated complexes in the town tend to have more units per complex, thus the CFS per apartment unit may not be the best measure to assess this issue.

Gates and Walls in Public and Other Subsidized Housing

The 1990s were a time when much scholarly attention was devoted to reassessing the country's public housing stock. This attention came on the heels of the release of the Final Report of the National Commission for Severely Distressed Public Housing (NCSDH) in 1993. Design elements that would make public housing a better place to live was also considered. Particularly influential was Oscar Newman's defensible space concept.[8]

Gates, fences, and walls are integral Oscar Newman's idea of defensible space where defined perimeters are the basis of safety. The HOPE VI program[9] in the 1990s incorporated these design elements as part of a rehabilitated public housing's security plan (Newman 1996). Henry Cisneros, the former secretary of HUD, also approved of these strategies as a way of creating community. He recognized that gating and walling in subsidized housing has the same effect as fortressing in higher income gated communities but argues:

> Legimate as these concerns may be, they are not relevant, in my judgment, to the use of defensible space in the low- and moderate-income communities I am addressing here (Cisneros 1996:13).

He goes on to explain that the difference between gates as a community improvement and fortressing is a matter of the materials used in the gates:

> Cheap wire mesh fences create a "fortress" impression, connoting a community that considers itself under siege. Open ironwork fences with attractive landscaping signal a stable and pleasant place to live (Cisneros 1996:13).

The idea of creating a stable, safe home for poor residents before engaging the larger community harkens back to Lee Rainwater's (1966) work on public housing in the late 1960s. Rainwater argued that security and safety in the home is necessary for people to be able to function well in society. If people do not feel safe at home, they are expending efforts to keep safe at the

[8] The New Urbanism was also influential but will not be discussed in this context.
[9] HOPE VI was established in 1993 to correct the public housing deficiencies detailed in the NCSDPH report.

expense of being a productive member of society. Thus, securing safety inside the walls of an apartment and by extension increasing security through installing walls and gates at the while creating some initial isolation would allow public housing residents to more fully engage the community in the long run. This same argument permeates both Cisneros's and Newman's writing on defensible space as an improvement for public housing.

Gating subsidized housing appears to be much more of a standard practice and sometimes requested by residents (Kreyling 1999; Richards 1996). For instance, Atlanta and Pittsburgh metro areas, and cities of Richmond Virginia and Birmingham Alabama have policies of gating some or all of public housing projects (Hilden 2003; McNulty1998; Silver 1998; National Public Radio 1998; Overbeck 1997). Nashville gates public housing on a case-by-case basis depending on the distress of the neighborhood. Indeed, while the idea that creating a safe public housing environment is the goal of gating and walling, that does not always work in reality. For instance, a HOPE VI coordinator at the local housing authority in Nashville noted:

> The residents asked for the gates. They said it was necessary to keep crime at bay. Normally, when you redo public housing, you try to link it back into the surrounding neighborhood…But we agreed because at Vine Hill there's not really much of a neighborhood to link to." (Kreyling 1999).

It is not clear if these measures actually reduce crime but may act more as a psychological boost as Rainwater predicted. For instance, a NPR story reported that in one public housing community that the crime rate went up 5.7 percent after fences and gates were installed. But the director of the Birmingham Housing Authority attributed the increase to residents feeling more secure to call police rather than an increase in crime (NPR 1998). As would be expected, reactions vary. Some public housing residents protest the gate as a means of "fencing in the poor" or that it produces a feeling of being caged or that they feel like criminals themselves while some welcome the gates and better security (Overbeck 1997; Richards 1996; McNultry 1998; NPR 1998).

The AHS[10] neighborhood quality data offers some support to resident's mixed perception of how useful gates are creating a haven in public and other subsidized apartments. When residents of all gated subsidized housing (vouchers, public housing and other government subsidies) were asked if they perceived of any crime in their neighborhood, 50 percent or more households reported no crime. The mixed perception arises when looking at the responses by ethnic groups and the various subsidy types. All African Americans living behind gates and using vouchers or other government subsidies reported no crime in their neighborhood but only 50 percent of public housing residents reported this perception. Sixty to 70 percent of ungated African American apartment residents reported crime in their neighborhood.

Hispanics using vouchers in gated communities demonstrated a similar mixed pattern of crime perception with 100 percent reporting some crime in their neighborhood. Four out of five gated apartment residents (84 percent) with other types of subsidized rent and roughly two-thirds of public housing residents (63 percent) and reported perceiving crime in their neighborhood. However in ungated situations, at least 75 to 80 percent of residents in all subsidized situation similarly reported no crime in their neighborhoods.

These data do not directly prove that gating public housing reduces crime but it appears that gating has a strong impact on residents' perception of crime; particularly among African-American and Hispanic voucher users and African American public housing residents. Thus appears that gating is not always necessary to produce safe neighborhoods but it at least creates the perception of safety which can be very important to the well being of low income residents[11]

[10] I used data from the 2001 national sample here and not the latest data from 2005 because the results between gating and non-gating were much clearer.
[11] See discussion of Rainwater (1966) in Chapter 4.

Tenure and Gated Communities

Gated communities in general are defined by the restricted access and the physical barriers to the development by walls, fences, and security system (gates and or guards) to non-residents. A spate of recent research has refined the definition to include four major dimensions: the functions of enclosure, security features and barriers, amenities and facilities and residents (Grant and Mittlesteadt 2004). Grant and Mittlesteadt (2004) believe that these studies have not gone far enough and suggest that four additional dimensions be considered including tenure, location, size, and policy context. Each dimension also can be further differentiated by its physical (such as the gate), economic (eg. property values), social (eg. privacy or exclusion) and symbolic (eg. status) characteristics. Although the authors consider policy context as a dimension, I would add to governance to this list because governance be differentiated by the same four characteristics and represent a significant part of the literature, particularly in the United States (McKenzie 1994; Blakely and Snyder 1997).

Rental gated communities have not been defined well because there is not much attention given to tenure in the literature. Other than Sanchez et al. (2005), passing reference is made to the lowest income gated communities which are typically public or some form of social housing or as apartment condominium communities (Blakely and Snyder 1997; Wilson-Doenges 2000; Giglia 2003; Grant and Mittlesteadt 2004; LeGoix 2003).

The Census Bureau has a similar definition but offers a somewhat ambiguous distinction between communities and buildings in the American Housing Survey. The AHS first gathered data on gated communities in the 2001 National Survey and the data has appeared in ensuing national and metropolitan surveys. The printed editions of the survey refers to gated communities as "secured communities" defined as "…types of communities [that] are typically residential communities in which public access by nonresidents is restricted, usually by physical boundaries

such as gates, walls, and fences, or through private security. These communities exist in a myriad of locations and development types, including apartment complexes, retirement developments, and resort and country club communities." The Census has also provided a separate category in the printed edition for "Secured Multiunits." While this sounds like apartments, the definition makes no reference to tenure. The difference between the two categories is that secured communities refer to the community while the later refers to one or more buildings. In fact, "secured multiunits" are tabulated under both tenures.

Tenure Differences between Homeowner and Rental Gated Communities

Tenure is an important variable to gated community research because it fundamentally shapes the character of the neighborhood. In addition tenure affords different sets of rights, benefits (both social and economic), experiences, and built environment to the respective residents. Table 1 summarizes the differences and similarities between these gated community types.

Table 2-2Tenure Differences between Common Interest Developments (CID) and Rental Gated Communities

Characteristic	Rental	CID
Tenure	▪ Renter ▪ Length of residency is often short term ▪ Easily converted to Condominium/HOA	▪ Owner ▪ Length of residency is more long term than rental ▪ Units can be rented but tenants most often do not have rights of owner
Management	▪ One on-site property manager/management company hired by owner ▪ May be managed by owner	▪ On-site Community Manager hired by developers and/or homeowners; ▪ May have multiple managers tied to a master homeowner association manager
Contract/effect on residents	Lease Agreement ▪ Rules in lease protect property owner not tenants ▪ Lease control tenants' behavior ▪ Violation of rules = eviction ▪ Rules detailed in lease ▪ Always under control of owner	Conditions, Covenants, & Restrictions (CC&R) ▪ CC&Rs protect all homeowners ▪ CC&Rs control homeowner behavior ▪ Violation of rules = foreclosure ▪ Rules encoded in deed ▪ Ambiguous control over governance during buildout
Law, Rights, and Governance	▪ Tenants need legislated law for protection of rights ▪ Owner must obey tenant/landlord laws; ▪ Owner maintains fee simple property rights ▪ Municipal governance ▪ Tenants and owners maintain more constitutional rights ▪ Social control of tenants maintained by management company and/or property owner and local police ▪ Subject to more scrutiny under fair housing laws ▪ Subject to state and local land use control ▪ Tenants-in-Common (TIC) ownership arrangement operates much like an HOA; investors own and are deeded fractional shares of property but are not involved in the day to day operations of property. ▪ Rental gated communities may be part of a larger owned Home Owners Association (HOA) and subject to the HOA's governance.	▪ Homeowners subject to contract law not legislated law ▪ Contract law may supersede regular fee simple property rights ▪ Private governance ▪ Homeowners in CIDs cede many constitutional rights to contract law ▪ Social control of homeowners maintained by management company and enforcement of CC&R through court system as an additional layer to local municipality ▪ Harder to enforce fair housing laws ▪ Subject initially to state and public land use control ▪ Converts to private land use control
Taxation, fee assessment and expenses	▪ Treated like businesses; ▪ Can deduct expenses and maintenance fees ▪ Owner can raise rents and other fees without tenant input subject to local law	▪ Maintenance fees (or condo fees) not tax deductible for homeowners ▪ Double taxation claimed ▪ Owners cannot treat expenses like business ▪ Condo fees and other assessments can only be raised with agreement of all homeowners
Maintenance/ Amenity provision	▪ Management company or owner provides services and amenities ▪ Tenants are not responsible for direct upkeep	▪ Management company may or may not provide services and amenities; ▪ Homeowners pay for upkeep through homeowner association fees
Diversity	▪ More heterogeneous by race and income ▪ Some homogeneity by age (senior housing)	▪ More homogeneous by age, race and income

Based on: Barton and Silverman 1994; McKenzie 1994; Blakely and Snyder 1997; Kirby 2005; Foong 2005

Housing Opportunity and Segregation in Subsidized and New Housing Markets

The Origins of Rental Gated Communities

Based on the literature and available data, it is difficult to determine the exact origins of this product type. A further complication in establishing baseline dates arises because apartment communities often retrofit gates and walls around their perimeters for various reasons that may not be reflected by the year the property was built. Because the AHS only began to ask questions on whether a household lived in a gated community in 2001, it is difficult to discern when the trend began.

The raw numbers in the AHS do not demarcate any clear line between gating and non-gating but the modal year for all and market rental gated communities is 1985 (see Table 2-2). The modal figures offer some indirect proof that gated rental communities as a product type began to appear during that period. These data confirm much of the homeowner gated community literature that anecdotally observes that the most recent round of gating began in earnest in the mid to late 1980s (Davis 1990; Blakely and Snyder 1997). If rental gated communities mirror this trend, which is a reasonable assumption, these data suggest that much gating and walling (fencing) is built *ex post facto*, particularly among the subsidized housing communities. The data indicate the newer apartment complexes are market rate communities that exhibit the modal year of 1985.

Table 2-3 Age of Rental Gated Communities

Type of Rental Gated Community	Mean	Median	Mode
Public Housing	1969	1970	1970
Voucher	1973	1975	1960
Subsidized Rent	1970	1975	1970
Market	1972	1975	1985
All	1977	1980	1985

Source: Author's calculation from 2003 American Housing Survey National Sample

Much of what gave rise to gated communities in general are lifestyle preferences of consumers, the prestige associated with gates, a mounting concern with safety, security, and privacy and perhaps a concern with growing diversity in large metropolitan areas (Blakely and Snyder 1997; Grant and Mittlesteadt 2004).

Developers also find gates to be in their interest as a marketing tool and to maintain a larger measure of control during the construction phase of the development. Although the literature applies these trends to homeowner gated communities, much of these same characteristics are found in rental gated communities. This is particularly the case where rental properties are embedded within large master planned communities.

Developers are also now building gated apartment complexes to condominium standards in anticipation of converting the property and file a subdivision map many years before they intend to sell units as condominiums. These apartment communities are referred to in the business as "Shelf" condominiums because the condo documents are put away for the duration of the rental period (Van Atta 1994). Tenants may not even be aware that the building has the right to go condo (Schubert and McGuire, 2005).

Segregation or Housing Opportunity?

The question left unanswered by Sanchez et al. (2005) is why so many minorities opt for multifamily gated communities? One reason may be that rental gated communities represent an unexpected dimension to segregation. Wealthy Americans have always employed a number of devices to control neighborhood dynamics the past. The more familiar mechanisms have been restrictive covenants, large lot, minimum house size, and minimum frontage and other types of exclusionary zoning in addition to gating private residential neighborhoods (Higley 1995). Scholarly evidence (Blakely and Synder 1997), newspaper accounts (eg. Overbeck 1997), and my

field research suggests that gating and walling, particularly in the western US, may represent two sides to the same coin. The wealthy may have turned to gating not only as a solution to enclaving themselves as a means to protect property value but to enclose apartment residents behind gates for the same reason.

Yet another somewhat speculative answer may arise from the small decrease in some forms of segregation observed over the last ten years. The decline in segregation has been detected most often in the fast growing Sunbelt areas where rental gated communities are most prevalent such as Phoenix and the Inland Empire of California (Lewis Mumford Center).

Some researchers have suggested that fast growth may contribute to more housing access for minorities. For instance, South and Crowder (1998) demonstrate that minorities have significantly more housing choice, availability and opportunity in places where there are new housing markets such as the Sunbelt as opposed to more entrenched parts of the Northeast. Yet, despite the prospect of more opportunity, minority housing prospects in general are still limited because of more familiar housing access difficulties such as credit problems, affordability, or a continued "lack of choice" due to more subtle and systematic forms of discrimination and segregation (Aalbers 2003; Ards and Myers 2001; Berry 2001; Yinger 1998). Thus decreases in segregation while perhaps a contributing factor cannot account for this phenomenon alone.

Sanchez et al. (2005) also discovered more renters than owners live in gated communities but that an even larger proportion of residents in rental gated communities are minorities and particularly Hispanic (See Table 2-3). These authors puzzled over the reason for gated rental communities having such a high percentage of Hispanic residents.

Table 2-4
Gated Communities by Tenure and Race/Ethnicity

Tenure	% White			% Black			% Hispanic		
	2001	2003	2005	2001	2003	2005	2001	2003	2005
Owner	4.2	4.2	4.2	3.1	3.8	3.5	7.0	6.3	6.2
Renter	10.3	11.4	10.7	12.0	13.3	12.3	15.2	17.2	15.4

Sources: Sanchez et al. (2005) and author's tabulation of 2003 and 2005 American Housing Survey National Sample. U.S. Department of Housing and Urban Development

Setha Low (2003) in her ethnographic account of gated communities offers some cultural reasons that may explain the number of Latinos in these apartment complexes. It appears that Latinos flock to gated communities and apartments both here and in Latin America for safety and security concern based on previous experiences both here and elsewhere. Gated communities and apartment complexes are commonplace in Latin America, so much so that in Brazil, there is "an "aesthetic of security" based on walls, fences and guards…" (Low 2003:123). One Latina informant in Low's book remarked that "In Sao Paulo you have those kinds of areas, gated communities in the suburban areas….So we picked a place in an apartment complex, gated closer to town." She goes on to say that she "only feels secure with gates" (Low 2003:87).

Indeed, Mexico has had a long tradition of gating and walling in its colonial architecture (Low 2003:124). Latinos do not see walled off space as a liability or an impediment to community activities. In fact, Latinos use all of the space within closed off areas. Mendez (2004) notes that in Los Angeles that Mexicans often wall off their property to use the entire space up to the yard in the plaza tradition that increases the space for social interaction between household members. Moura (2003:5) remarks that "the openness of the spaces within the walls [are] more relevant than the actual closing off of the area." Low's Brazilian informant echoes this tendency: "In Latin America, there was socializing within the gated community" and "lots of activities for families and children" (Low, 2003:87). Davis (2000) hints at how important gates are culturally to Latinos when he mentions that successful immigrants leave behind their gated *casas de suenos* (translation: dream

houses) in Mexico to work full time in the US. Arabs live similarly and fully use the enclosures as Glasze and Alkhayyal (2002) classify as "extended-family compounds."

Trends in Gated Subsidized Housing

Another reason for high percentages of minorities in rental gated communities is that a substantial proportion of minorities live in subsidized rental housing. Blakely and Snyder (1997) were among the first scholars to systematically investigate gated communities. The authors performed a nationwide survey of gated communities and used newspaper articles as supplement facts where they did not have hard data. But their analysis mostly focused on homeowners. The few newspaper accounts that they incorporated into the book mentioned two incidents of public housing developments that retrofitted gates in 1992 as a security measure: Potomac Gardens in Washington DC and Mar Vista Gardens in Los Angeles. Wilson-Doenges (2000) describes a similar retrofit on a public housing project in Los Angeles in 1991.[12]

Table 4 compares the percentage of households in gated rental communities that are public housing or have residents using vouchers or other government subsidies. These data indicate that although a small percentage of all rental gated communities are public housing, that nearly 1 in 8 public housing families (in 2003) lives behind walls or fences. Gated apartments are also home to voucher recipients and other forms of government subsidized rent (such a tax-exempt bonds and other state affordable housing programs). Although the AHS shows in Table 4 that as a percentage of gated communities that the percentage of voucher recipients in gated communities is going down, the percentage of those units receiving some form of subsidized rent increased somewhat in 2003 but has dipped somewhat in 2005.

[12] Interestingly, that these two studies use public housing projects as their examples of low-income gated communities rather than finding low-income market rate projects. It seems that rental gated communities that are not public housing are assumed have residents with high income.

Table 2-5 Percent Households in Enclosed Subsidized Housing Communities						
	As a Percentage Rental Gated Communities			As a Percentage of Subsidized Housing Type		
	2001	2003	2005	2001	2003	2005
Public Housing						
Gated	5.8	6.3	5.8	11.9	13.5	11.5
Non-Gated	5.7	5.5	5.8	87.8	86.5	88.5
Vouchers						
Gated	2.7	2.6	2.4	12.0	10.9	10.0
Non-Gated	2.7	2.9	2.8	88.0	89.1	90.0
Other Government Subsidized Rent						
Gated	8.1	8.2	8.2	13.7	14.7	13.9
Non-Gated	6.9	6.6	6.6	86.2	85.3	86.1
Source: Author's tabulation of 2001, 2003 and 2005American Housing Survey National Sample, U.S. Department of Housing and Urban Development						

Table 2-5 shows the demographic characteristics of these communities. Hispanics do not occupy as high a percentage in public housing as they do in other forms of subsidized gated rental housing. Blacks, on the other hand, are a higher percentage of gated public housing than Hispanics or whites. Blacks are gaining as the larger share of those groups that are gated in public housing. Interestingly, whites (which are mostly seniors) using vouchers and other subsidized rent are found more often in gated rental situations.

Table 2-6 Demographic Characteristics of Gated Subsidized Housing						
	Gated as a Percentage of Racial/Ethnic Group Renters			Gated as a Percentage of Subsidized Housing Type		
	2001	2003	2005	2001	2003	2005
Public Housing						
White	4.1	2.7	1.5	51.1	43.1	37.3
Black	11.2	12.3	10.9	36.5	44.9	53.6
Hispanic	5.7	6.7	3.4	16.6	27.4	19.5
Vouchers						
White	58.1	49.3	61.7	2.2	2.3	1.0
Black	28.5	48.9	56.3	4.7	5.6	2.9
Hispanic	23.0	31.7	40.8	3.8	3.2	2.9
Other Government Subsidized Rent						
White	57.7	48.9	56.7	5.7	5.6	6.7
Black	30.2	44.1	36.5	11.4	15.0	13.1
Hispanic	17.3	24.1	18.5	7.3	7.4	6.3
Source: Author's tabulation of 2001, 2003, and 2005 American Housing Survey National Sample, U.S. Department of Housing and Urban Development						

New Housing Markets and Housing Opportunities for Minorities

Although a significant amount of rental gated communities serve the lowest income groups, most minorities in rental gated communities lease at market rates. The 2003 and 2005 AHS points to a continued growth in gated communities in most major metropolitan areas. As Table 2-6 indicates seven out of the ten largest metro areas experienced at least a slight increase in the percentage of walled and access controlled communities. Several metro areas including Atlanta, Dallas, Detroit, Houston, Los Angeles, and Washington DC have almost doubled or more than doubled their percentage of renter household in gated communities from 2001 to 2005. Boston and New York show dips in the percentages in that same period.

Table 2-7
Percent Households in Gated Rentals in Top 10 Metropolitan Areas

Top 10 Metropolitan Areas	Percent Households Gated		
	2001	2003	2005
Atlanta	7.4	12.2	24.3
Boston	3.5	2.7	2.8
Chicago	5.3	4.4	9.2
Dallas	17.8	18.9	34.8
Detroit	2.3	3.7	5.9
Houston	26.7	24.1	52.7
Los Angeles	18.2	19.4	30.7
New York	5.2	7.5	5.1
Philadelphia	2.0	2.3	6.2
Washington DC	4.3	4.9	9.8

Source: Sanchez et al. 2005 and Authors Calculation of 2003 and 2005 AHS National Survey

Atlanta, Houston, Dallas and Los Angeles however show at least a quarter to up to more than half in the case of Houston of its renter households in gated communities. The trend indicates of that these metro areas that are south of Boston and New York and even more so south of the

Mason-Dixon Line have been adding substantially to the stock of rental gated communities over the 2001 to 2005 period.

Beyond just these larger metropolitan areas, rental gated communities are found in smaller but growing areas in the south and the western parts of the United States. These fast growing housing markets were until recently overheated. What these housing markets have in common is that because they are sprawling into new ground, there is not much of an entrenched housing market and the municipal fragmentation that is prevalent in the east is not present in the same fashion in the west. These trends offer new housing opportunities for minorities[13] (Crowder, Tolnay, and Adelman 2001; South and Crowder 1998). Because there is no expectation of how an area should be divided racially coupled with fair housing laws, minorities have somewhat less restraint on their housing choice than minorities in eastern cities and suburbs (Rosenbaum 1994). In fact, Crowder et al. (2001) note that blacks are more likely to move into newer housing in a white or a mixed tract in the west when compared to the Midwest or the South. And Ellen too (2000a, 2000b) finds that racial mixing is more "tenable" in areas further outside the city rather than close in especially when initiated early into the city development process.

Rental housing offers more opportunity overall for lower segregation because of the very nature of the apartment market. Ellen (2000a, 2000b) posits that renters are more open to diversity because they do not own their homes and are not concerned with property values. Renter demographics also favor mixing because renters are more likely to be young, unmarried and, if married, without children or empty nesters. This reduces concern for safety and quality of schools. Thus, it is not entirely surprising that rental gated communities may offer more opportunity for

[13] Researchers often examine housing opportunities as access to homeownership with one of the dimensions being discrimination. Here I will focus on housing opportunities as a function of less discrimination and more availability in rental housing. Housing opportunity can be defined in terms of availability, discrimination practices, tenure and amenity preferences, and persistent segregation patterns.

minorities. In addition, most analyses of rental markets look only at renters as short-term residents. Wulff and Maher (1998) conducted one of the only studies of long-term renters and found that in addition to short-term renters there are two types of long term renters. The first, *continuals* are those who have always rented and usually have lower household income and higher unemployment rates. The other long-term renter, *returners* are those who have resumed renting after owning a home at some point. This group is more socioeconomically diverse, usually older, and often has had marital difficulties such as separation or divorce. Although they conducted their study in Australia, it is not difficult to see cross-cultural similarities in the US.

The tendency of gates and fences to increase the social distance between those inside and outside the gate would be similarly effective in allowing diversity in a situation where there are non-gated homeowner developments outside the rental gated community. There is no disputing that generating social distance in this manner creates segregation but because gated communities occur worldwide among homogeneous populations (see Low 2003; Billing and Churchman, 2003) this behavior may be based more in class/income separation or density rather than solely on race.

Pendall (2005) confirms this tendency at least for native-born Hispanics who live in dense, class-stratified neighborhoods rather than in ethnic enclaves. Harris (1999) offers a cautionary conclusion that in some cases, social class is more segregating than race even for blacks. His hedonic model finds that people avoid black neighborhoods more for reasons of social class. That is, whites are not necessarily avoiding black neighbors but rather have a stronger preference for affluent, well educated neighbors. In addition, Iceland, Sharpe and Steinmetz (2005) find that higher SES African Americans tend to live in more integrated neighborhoods, although the effect is small. It is important to note that Cutler, Glaser, and Vigdor (1999) find that whites often pay a premium for living in white neighborhoods and that decreasing segregation is not a product of

integrating all black census tracts. They also observe that segregation has not declined in the largest cities but smaller cities and in particular the suburbs.

Housing Restraints: Expensive Housing Markets

The housing market has been becoming more and more expensive in areas where gated rental communities are proliferating. Apartments become the affordable housing of choice by default. In addition, the most active rental gated community building is often found in areas with large immigrant populations such as California, Florida, and Texas. In these markets, most recent immigrants rent, are rent burdened and live in more crowded conditions than native born households. For instance, more than 75 percent immigrants rent, with less than a quarter of those who arrived from 1991 to 2000 owning their own homes. This is compared to about 69 percent of native households (Greulich, Quigley, and Raphael 2003). In addition, rent burden is also aggravated by high housing demand even from the influx of immigrants themselves. For instance, Saiz (2003) estimates that high immigration in a market increases rent by about one percent.

Condominium conversions until recently had been adding to fuel to already expensive markets. When housing values were rising coupled with low interest rates, gated rental communities were prime targets for condo conversion. Although 2007 has seen demand cool because of credit market gyrations, the previous demand for second homes and affordable entry prices stimulated demand for condos and conversions in the past three-five years (see Table 7). Part of the allure of conversion is the shortage of land zoned for multifamily housing or infill housing in expensive, desirable housing markets. And although converters were paying a premium for these properties (because of competing demand from other condo converters) these investors claim that conversion costs much less than building new construction. New construction involves costs in locating appropriate land and the expense of getting permission and permits to develop. Existing buildings

skirt most of these problems by bringing the building up to "condo" standards and to conform to local conversion laws.

Apartment builders and REITs often prepare newly constructed multifamily developments to be converted in the near future by building to "condo specifications." In California, standard practice over the last five years is to build to condo spec to rent first and then convert after ten years (Real Facts 2004). But analysts have reported that conversions have slowed to a trickle and many condos with less than stellar sales are returning to the rental market (Marcus and Millichap 2006; National Association of Realtors 2005; Slatin 2005).

Table 2-8 Apartment Units Converted to Condos and Vacancy Rates

Markets	2002 Total Units	2003 Total Units	2004 Total Units	2005 Total Units	2005 Vacancy Rate	2006 Vacancy Rate	Difference 2005-2006
Average US	--	--	--	--	6.3	5.9	-0.4
Boston	--	108	1,897	1,531	6.8	5.8	-1.0
Ft. Lauderdale	--	2,234	5,594	11,955	3.7	3.4	-0.3
Chicago	261	863	1,333	7,495	4.9	5.7	-0.8
DC		4,087	4,877	7,082	4.0	3.8	-0.2
Jacksonville	696	1,050	1,757	3,496	7.3	5.8	-1.5
Las Vegas	--	648	6,823	4,847	3.7	3.3	-0.4
Los Angeles	159	308	2,173	2,203	3.7	3.3	-0.4
New York	--	--	1,460	5,697	3.4	3.2	-0.2
Miami	1,295	2,851	11,524	8,695	3.7	3.6	-0.1
Orange County	--	344	357	1,530	4	3.9	-0.1
Orlando	148	288	4,406	14,183	3.5	3.2	-0.3
Palm Beach	690	932	2,936	7,510	3.7	4.1	0.4
Phoenix	274	252	981	11,862	5.05	5.2	-.15
San Diego	1,113	2,062	7,345	5,092	3.5	3.3	-0.2
Seattle	--	184	521	2,868	3.5	3.3	-0.2
SW Florida	348	732	2,300	8,298	6.2	5.3	-0.9
Tampa	95	1,133	2,356	13,468	5.1	4.6	-0.5

Source: Real Capital Analytics and Marcus and Millichap Research Services

Affordable housing preservation becomes an issue during periods of condominium conversion because much rental gated communities are the seeds of homeowner gated communities.

Real estate market analysts report that conversion trend was profitable for the leasing market because the rents have been flat in some markets and conversions tend to tighten up the market and raise rents (Marcus and Millichap 2007). Table 2-7 indicates that in most US markets that apartment vacancies are dropping indicating more expensive markets. The top seven lowest vacancy rates are among the most active condo conversion markets in the recent past. These market conditions indicate a serious loss of affordability among the lower income groups that live in these communities.

Aggravating this problem is a concurrent trend of less new rental construction to both replace condominium conversions and to meet continued demand. As Table 2-8 indicates, the percentage of housing units started for rent has been declining steadily for the last eight years. Indeed, the percent for sale starts exceeded the percent for rent starts in 2005 for the first time during this period. Industry observers have noted that in some markets, apartment construction is in tough competition with for-sale multifamily counterparts. This includes many large apartment REITs that, under the right market conditions, shift their business strategy to include some condo construction and conversions (Smith 2005; Handley 2005; Mattson-Teig 2005).

In response to the potential loss of affordable rental housing, several large cities and communities initiate moratoriums on conversions or began legislative activity. Examples of these communities are Los Angeles, San Francisco, East Palo Alto, San Diego, and Hayward California; Las Vegas, Key West, Pembroke Pines, Daytona Beach Shores, Florida; Asbury Park, NJ; and Montreal Canada. Ironically, the loss is slowing somewhat since the market is undergoing a correction.

Table 2-9 New Privately Owned Housing Units Started by Purpose (000s of units)							
Year	Total	Family	Units in Buildings with 2 or More Units				
			Total	For Rent	For Sale	% for Rent	% for sale
1998	1,271	882	346	287	59	82.9	17.1
1999	1,302	912	339	270	69	79.6	20.4
2000	1,568	1,230	338	263	75	77.8	22.2
2001	1,603	1,274	329	258	71	78.4	21.6
2002	1,706	1,359	347	274	73	79.0	21.0
2003	1,849	1,499	350	265	85	75.7	24.3
2004	1,957	1,611	346	226	120	65.3	34.7
2005	1,716	1,359	352	149	203	42.3	57.7
Source: Census Bureau 2005							

Affordability is still challenged in the current unstable housing market. Even though there is a stock of unsold single family houses and condos and condo that have reverted to rental, analysts still suggest that rental property owners should be able to see increases in rent due to how demand has been reconfigured. Consider that because people cannot get mortgages under current mortgage approval guidelines, they still have to compete for rental housing. Supply is constrained to meet this demand because of the declining construction of new multifamily units.

The next chapter takes up some of these national trends, such as affordability and demographics and explores them on a more regional level. This chapter focuses on a case analysis of these trends in three metropolitan areas in the Southwestern US, Phoenix AZ, Las Vegas, NV and the Inland Empire, CA.

Chapter 3

Characteristics of Rental Gated Communities in the Inland Empire, Phoenix, and Las Vegas

Introduction

This chapter is a case study of rental gated communities in three large metropolitan areas in the Southwestern United States: the Inland Empire (Riverside and San Bernardino Counties), California, Phoenix, Arizona and Las Vegas, Nevada. The case study drills deeper into some of the trends outlined in the previous chapter and details basic characteristics of rental gated communities in this region. The descriptive analysis in this chapter uses data drawn from a combination of a newly created database matched with other existing databases. The chapter first defines the concept of a rented gated community as operationalized for this study. Then the rationale for research project is discussed including a description of the study area and the elements of the database created for this study. The final portion of the chapter analyzes the data drawn from the database.

Rationale for the Study Area

The study area was selected based on the prevalence of rental gated communities in southern and southwestern states revealed by the American Housing Survey. I selected three metropolitan areas to study: Riverside/San Bernardino California, Phoenix Arizona, and Las Vegas, Nevada. Because these areas have been growing rapidly over the last 15 years into previously undeveloped areas, it is reasonable to assume that they have less of an entrenched housing market and offer potentially higher housing opportunities for minorities.

Table 3-1A Population Change 1990-2000								
Metro	Population				Rank		Density	
	2000	1990	Change 1990-2000	% Change 1990-2000	2000	1990	2000	1990
Las Vegas-Paradise, NV	1,375,738	741,368	634,370	86	36	56	173.9	93.7
Phoenix-Mesa-Scottsdale, AZ	3,251,876	2,238,498	1,013,378	45	14	20	223.1	153.6
Riverside-San Bernardino-Ontario, CA	3,254,821	2,588,793	666,028	26	13	14	119.4	94.9
Source: US Census Bureau and author's tabulation of Census Data Table B-1. Metropolitan Areas -- Area and Population State and Metropolitan Area Data Book: 2006 Metropolitan and Micropolitan Area Data Tables www.census.gov/compendia/smadb/SMADBmetro.html Note: Rank is based on total population in the 361 metropolitan areas defined by the census								

Table 3-1B Population Change 1990-2005								
Metro	Population				Rank		Density	
	2005	1990	Change 1990-2005	% Change 1990-2005	2005	1990	2005	1990
Las Vegas-Paradise, NV	1,710,551	741,368	969,183	131	31	56	216.3	93.7
Phoenix-Mesa-Scottsdale, AZ	3,865,077	2,238,498	1,626,579	73	14	20	265.2	153.6
Riverside-San Bernardino-Ontario, CA	3,909,954	2,588,793	1,321,161	51	13	14	143.4	94.9
Source: US Census Bureau and author's tabulation of Census Data Table B-1. Metropolitan Areas -- Area and Population State and Metropolitan Area Data Book: 2006 Metropolitan and Micropolitan Area Data Tables www.census.gov/compendia/smadb/SMADBmetro.html Note: Rank is based on total population in the 361 metropolitan areas defined by the census								

Population growth and change have been displayed in Tables 3-1A and 3-1B. Table 3-1A shows the population change in the study area metros from 1990-2000 and Table 3-1B reports the same statistics but over the 1990-2005 period. While both these tables indicate a substantial amount of growth in both periods, the more dramatic growth is visible during the 15-year period of 1990-

2005. What is also evident from these tables is that the metropolitan areas are getting denser. The fast growth and density indicate these areas are ripe targets for all types of development but are particularly attractive to multifamily developers. The census bureau also reports that most of the growth is not due to natural increase. Las Vegas leads all these metropolitan areas with nearly 81 percent of its growth attributable to inmigration (both foreign and domestic), Riverside/San Bernardino ranks second on this list followed by 72 percent more newcomers moving to the Phoenix metropolitan area (U. S. Census Bureau 2007).

Data Collection

I have created a nonrandom database, I call the Rental Gated Community Database (RGCDB), to identify both the location and physical characteristics of rental gated communities at the property level rather than the household level that is the basis of the American Housing Survey. The database was created by compiling as many unique rental properties as possible (both gated and nongated) in a metropolitan area from several online rental listing services such as Rentnet.com, Apartments.com, and ApartmentGuides.com. The commercial rental listing services do not necessarily contain every property in a particular metro area. The combination the information gathered from all these websites enabled me to verify existing listings and find additional information on these properties as well as to add more data from other sources if a complex was missing. Some of the information was verified through property tax databases where the information was available. The database contains information on whether the property is gated, its address, managed professionally, has any subsidized units, rent, number of bedrooms, number of floors, square footage of apartments, year built, and year remodeled.

The commercial listings did not always report whether the property offers subsidized units and it was not always clear what subsidies was used. I matched available HUD and state housing

authority databases to the properties and tracked whether the property was subsidized through these additional checks. I tried to collect information on national housing programs for consistency across states and because information on state subsidies was not very complete. The subsidies I tracked were Housing Choice Vouchers (aka Section 8), Low Income Housing Tax Credits (LIHTC) and Tax Exempt Bonds (TEB), Section 202, Section 221(d)(4) and 223(d)(f) in various combinations. HOME grants were also used in some instances.[14] The point here is to identify the incidence of these programs for the purpose of understanding potential neighborhood effects.

I gathered additional information on the degree of security from the property listings that includes whether the property is gated 24 hours, has a guarded gate, and has security guard patrols. I have also developed proxy measures of whether the property caters to families (the ad lists a playground amenity) or Latinos (the ad notes that property management company speaks Spanish or the property was listed on a site with listings in Spanish).

Sample Size

Table 3-2 displays the rental gated community database size distinguishing the number of gated properties from nongated communities. The mix of gated and nongated complexes was kept for comparative purposes and to get a rough sense of the percentage of gated rental communities that exist in the metropolitan area. As indicated by the table 3-2 the database contains less gated complexes as a percentage of the total database, which is consistent with data derived from the American Housing Survey. As Table 3-3 shows, these same metropolitan areas contain less households in gated complexes than in nongated complexes.

[14] For an explanation of each of these programs, please see www.hud.gov.

Table 3-2
Distribution of Gated and NonGated Properties in Study Area

Metro	Gated Rental Properties	% Gated Rental in Metro	% Gated Rentals in Study Area	Non Gated Rental Properties	% NonGated in Metro	% Nongated in Study Area	Totals
Las Vegas	325	46.6	9.9	372	53.4	11.4	697
Phoenix	585	37.2	17.9	989	62.8	30.2	1,574
Inland Empire	448	44.7	13.7	554	55.3	16.9	1,002
Totals	1,358	41.5	41.5	1,915	58.5	58.5	3,273

Source: Author's tabulation of study database
Note: Inland Empire is Riverside and San Bernardino Counties

Table 3-3
Households in Gated Communities in Study Areas

Metro/Tenure	HH in Gated Communities	% of Owned or Rented Metro	% Metro	% Study Area	HH Not Gated	% of Owned or Rented Metro	% Metro	% Study Area	Totals
Las Vegas									
Owned	54,106	25.8	15.9	2.9	155,275	74.2	45.7	8.2	209,381
Rent	38,555	29.5	11.3	2.0	92,035	70.5	27.1	4.9	130,590
Phoenix									
Owned	67,889	10.6	7.1	3.6	573,282	89.4	60.0	30.2	641,171
Rent	79,459	25.3	8.3	4.2	234,940	74.7	24.6	12.4	314,399
Riverside/ San Bernardino									
Owned	49,556	11.9	8.2	2.6	366,233	88.1	60.9	19.3	415,789
Rent	53,234	28.7	8.8	2.8	132,504	71.3	22.0	7.0	185,738
Totals	342,799	18.1	16.5	18.1	1,554,269	81.9	74.6	81.9	1,897,068

Source: 2005 American Housing Survey National Sample

The total number of gated properties appears to be fairly accurate indication of rental gated communities in these metropolitan areas. Consider the Las Vegas Metro area as displayed in Table 3-4 below as an example. The database indicates that the average number of units in gated properties is 270, so a rough estimate of the total units in gated complexes is about 87,750. If one assumes that the average household size is about 2 that would equal about 43,875 households or

5,300 more households than the 2005 American Housing Survey's tally.[15] The same calculation for Phoenix is about 4 percent less than the AHS and the Inland Empire is about 20 percent less than the AHS. This exercise suggests that the online listing services are useful to identify most of the rental gated complexes.

Table 3-4
Comparison between the Rental Gated Community Database and American Housing Survey

Metro	Gated properties	Avg # Units Per Gated Property	Estimate HH	Estimate People per HH	AHS Gated HH #	Difference AHS to Estimate	Percent
Las Vegas	325	270	87,750	43,875	38,555	-5,320	-13.8%
Phoenix	585	260	152,100	76,050	79,459	3,409	4.3%
Inland Empire	448	191	85,568	42,784	53,234	10,450	19.6%

Source: Author's Tabulation of 2005 American Housing Survey and Rental Gated Community Database

The database was also geocoded to matching these properties to census tracts to elicit information about the surrounding neighborhood and for a segregation analysis discussed in the chapter 6. The analysis will be between Clark County, Nevada, Maricopa, County, Arizona and the Inland Empire counties of Riverside and San Bernardino. Comparisons will be made at the county, census tract and property levels. In order to make comparisons with other data, the individual property data was aggregated to the census tract level. In some cases the variables were totaled, in others the median figure for all the properties was used. Table 3-5 displays the total count of census tracts that were enumerated in 2007 and the number of tracts that data was available for use in this study. The final column indicates the percent of tracts covered by the database. The best coverage was in Maricopa and Clark Counties with the California counties yielding about half of the census tracts.

[15] The count of properties in the study's database was based on 2007 numbers while the AHS was based on 2005 numbers which is the latest survey available.

Table 3-5 Study Census Tracts			
County	**Total Tracts**	**Tracts Analyzed**	**Percent of Total**
Clark County, Nevada	345	219	64
Maricopa County, Arizona	663	437	66
Riverside County, California	334	164	49
San Bernardino County, California	244	122	50
Totals	1,586	942	59
Source: Author's tabulation of Census Tracts from 2007 FFIEC.com database and Rental Gated Community Database			

Rent and Income

Based on the monthly rent collected for each property, I was able to derive additional variables related to income. Based on interviews with property managers in the field, a tenant qualifies to rent a particular apartment based if their monthly income equals three times the monthly rent. In poorer neighborhoods or as part of an affordable housing agreement (usually affordable housing set-aside agreements in California), potential renters were allow to qualify if their monthly income was 2.5 times the monthly rent. Based on these rule of thumb guidelines, I was able to estimate the income needed to qualify for the rent on both a monthly and yearly basis. This enabled me to analyze various income parameters and compare income diversity to population diversity. The rent data in the database is the most current rent posted as of June 2007. Rents often change quickly because of turnover to new tenants or to meet current (changing sometimes daily or weekly) market demand particularly in REIT-owned properties. The rent reported here does not include any incentives, taxes or utilities. Also, the rent data was not always available for subsidized properties because the amount is fixed at a specific percentage of tenant's income, usually 25 to 30 percent depending on the program.

Rent Premium. Rent is more expensive in gated apartment complexes in the study area. This reaffirms the hedonic research done by Benjamin, Sirmans and Zeitz (1997) who found that having 24 hour security in an apartment complex commands a rent premium. The presence of the

24-hour security measures, according to Benjamin et al. (1997) "seems to increase demand for apartments and increase rent." (Benjamin et al 1997:355).The rent premium was found specifically in "safer" neighborhoods where the security measures were not installed because of neighborhood safety concerns. While this analysis looked at non-gated high rise apartments in Washington DC, it suggests that various security measures are a service that tenants are willing to pay extra for.

In the study area, the median rent for gated communities are least $50 more for smaller apartments as in San Bernardino. The median rent in larger gated apartments in all the counties are at least $100 more than the nongated units. This finding is not surprising given that hedonic models of new-single family residential structures indicate that the newer the structure, the higher the value (Thibodeau 1995). Hedonic analyses construct house price indexes to measure housing quality by looking at changes in house prices relative to the existing bundle of housing characteristics measured against changes in the quality of the housing stock (See for example Thibodeau 1995). These studies find that in general increased housing prices signal higher quality housing and also neighborhoods. While these models more often look at single family homes, the general trend still applies to the rental stock.

Table 3-6 Rent in Gated and Non Gated Rental Communities (in dollars)

County/ Measure	Gated		Not Gated	
	Min	Max	Min	Max
Clark				
Mean	$735	$1,015	$657	$843
Median	750	1,000	650	824
Maricopa				
Mean	$672	$971	$570	$762
Median	665	900	549	710
Riverside				
Mean	$860	$1,169	$750	$989
Median	850	1,095	775	960
San Bernardino				
Mean	$900	$1,188	$832	$1,059
Median	895	1,110	850	1,000

Source: Author's calculation of the RGCDB See Appendix for more detailed table

Correspondingly, Table 3-7 gives an indication of the income necessary to be able to rent a gated or nongated apartment in these counties. The estimate annual income for gated apartments requires more income than the non-gated apartments according to the table. Gated apartments in the California counties require much more income to qualify for leasing than the other two regions. In fact the income needed for gated apartments is apartments in the Inland Empire are about two-thirds of the median income for the larger units. Even the smaller apartments require more than half the area's median income (AMI). Affordable housing programs that lower the qualifying income in California to 2.5 times the monthly rent, allow renters to lease larger apartments. For instance, rather than requiring 66 percent of the AMI in San Bernardino County, the prospective tenant would have to have an income that was 56 percent of AMI, 10 percent less than the market rate qualifying income.

Table 3-7 Estimated Annual Income Need to Qualify for Gated and Non Gated Properties (in dollars)

County/ Income Figures	Minimum 2.5X Rent		Maximum 2.5X Rent		Minimum 3X Rent		Maximum 3X Rent	
	Gated	Non Gated	Gated	Non Gated	Gated	Non Gated	Gated	Non Gated
Clark (2007 MSA Median Income 2007 $60,100)								
Mean	22,038	19,708	30,453	25,282	26,446	23,650	36,543	30,339
Median	22,500	19,500	30,000	24,720	27,000	23,400	36,000	29,664
Maricopa (2007 MSA Median Income $60,100)								
Mean	20,163	17,096	29,129	22,869	24,196	20,516	34,954	27,443
Median	19,950	16,470	27,000	21,300	23,940	19,764	32,400	25,560
Riverside (2007 MSA Median Income $59,200)								
Mean	25,787	22,507	35,070	29,683	30,945	27,009	42,084	35,620
Median	25,500	23,250	32,850	28,800	30,600	27,900	39,420	34,560
San Bernardino (2007 MSA Median Income $59,200)								
Mean	27,007	24,946	35,630	31,762	32,408	29,935	42,757	38,114
Median	26,850	25,500	33,300	30,000	32,220	30,600	39,960	36,000

Source: Author's tabulations of the Rental Gated Community Database and HUD's 2007 estimate of Median Income for the MSA

Notes: Minimum and Maximum figures are based on lowest monthly rent reported by property, usually for an efficiency or one bedroom unit. Minimum most often refers to efficiency or one bedroom, maximum rent usually is rent for a unit with 3 bedrooms or more. In some cases the minimum and maximum may be the same because the property has only one unit type available and a single rent charge. Annualized figure is calculated by multiplying original monthly figure by 12. A more detailed version of this table will be found in the Appendix

Property Age

Gated communities and various forms of restricted access neighborhoods have existed since at least the middle of the 19th century (see for instance Blakely and Snyder 1997; McKenzie 1994). The more recent variation that resembles the modern structure in term of the number and form and is often dated to around the early to mid 1960s (McKenzie 1998). The 1960s when organizations such as the Urban Land Institute (ULI) and its progeny the Community Association Institute began to create the antecedent CC&Rs that resemble those found today and large master-planned communities and new towns such as Columbia, Reston and the Woodlands began to emerge (Weiss 1987; Forsyth 2005; ULI 1974).

Because homeowned gated communities have been documented for so long, it is somewhat easier to pinpoint to their origins. Now, for the first time, the 2001 American Housing Survey allowed researchers to explore various household characteristics of all gated communities, including estimating the year(s) that rental gated communities began to be built in earnest (Danielsen 2007). Tabulating the American Housing Survey suggests that the mid-1980s is the jumping off point for the mass construction of rental gated communities. The pooled Rental Gated Community database confirms a similar finding of 1986 (see appendix for the pooled data measures of central tendency). Table 3-8 details the regional contrasts for these trends, with Clark County being the most recent arrival to this trend and San Bernardino having the older rental stock. It is also evident that rental gated communities are much newer than their nongated counterparts.

Table 3-8 Year Property Operational—Measures of Central Tendency

Measure	Clark			Maricopa			Riverside			San Bernardino		
	All	Gated	Non Gated	All	Gated	Non Gated	All	Gated	Non Gated	All	Gated	Non Gated
Mean	1991	1995	1987	1983	1989	1979	1990	1991	1990	1986	1988	1984
Median	1992	1997	1988	1984	1987	1981	1989	1989	1990	1986	1987	1985
Mode	1989	1998	1988	1986	1986	1985	1987	2006	1987	1986	1986	1985

Source: Author's calculation's of the Rental Gated Community Database

The newness of rental gated communities as a product type is more clearly seen in Tables 3-9 and 3-10. These tables detail the year when the property became operational by 5 and 10 year intervals. It is important to note that is not possible to know why there are quite a few gated communities prior to the 1980s, but field visits and interviews suggest that much of these complexes were gated many years after the initial building phase. Since the literature suggests that the 1980s are a much more likely starting point for the properties to have been built with the gates, the analysis here will focus mainly on this time period.

Table 3-9 shows the momentum of rental gated communities, particularly in the 1980s. Although the 1980-1984 year recorded a substantial rise of rental gated communities over the previous five years, the second half of the decade more than doubled the production of the first half. The sharp dip in the early 1990s of both gated and nongated properties reflects the economic downturn of that time. There was also a multifamily restructuring fallout following the Tax Reform Act of 1986 that made rental properties a less desirable investment until the laws governing REITS were changed in the early 1990s. The economic upswing of the mid-late 1990s coupled with cheap money fueled the dramatic turnaround of 212 properties built. This represents nearly three times the number of gated properties built in the 1990-1994 period.

Table 3-9, while providing necessary detail to understand when gated properties become the dominant product form, masks the bigger picture provided in Table 3-10. The striking picture that emerges out of Table 3-10 is that although more rental properties in total database were built in the 1980s, the 1990s is when gated rental communities became the industry standard. In the 1980s, 60 percent non-gated and 40 percent gated properties were built, but in the 1990s that percentage almost exactly reversed itself by the 1990s and persisted (and even increased somewhat).

Table 3-9 Year Properties Operational 5 Year Intervals									
Year Property Operational	**Gated**	**% Gated Year**	**% Gated**	**% of Total**	**Not Gated**	**% Not Gated Year**	**%Not Gated**	**% of Total**	**Total**
<= 1949	5	50.0	0.4	0.2	5	50.0	0.3	0.2	10
1950 - 1954	2	18.2	0.2	0.1	9	81.8	0.6	0.3	11
1955 - 1959	2	7.4	0.2	0.1	25	92.6	1.7	1.0	27
1960 - 1964	23	19.5	2.0	0.9	95	80.5	6.5	3.6	118
1965 - 1969	23	26.4	2.0	0.9	64	73.6	4.4	2.4	87
1970 - 1974	62	25.5	5.3	2.4	181	74.5	12.4	6.9	243
1975 - 1979	54	28.9	4.6	2.1	133	71.1	9.1	5.1	187
1980 - 1984	121	30.3	10.4	4.6	279	69.8	19.1	10.6	400
1985 - 1989	280	45.9	24.1	10.7	330	54.1	22.6	12.6	610
1990 - 1994	71	44.9	6.1	2.7	87	55.1	6.0	3.3	158
1995 - 1999	212	68.6	18.2	8.1	97	31.4	6.6	3.7	309
2000 - 2004	212	66.5	18.2	8.1	107	33.5	7.3	4.1	319
2005+	97	66.9	8.3	3.7	48	33.1	3.3	1.8	145
Totals	1,164	44.4	100.0	44.4	1,460	55.6	100.0	55.6	2,624
Source: Author's Tabulation of Rental Gated Community Database									

Table 3-10 Year Properties Operational by Decade									
Year Property Operational	**Gated**	**% Gated Decade**	**% Gated**	**% of Total**	**Not Gated**	**% Not Gated Decade**	**%Not Gated**	**% of Total**	**Total**
<= 1949	5	50.0	0.4	0.2	5	50.0	0.3	0.2	10
1950 - 1959	4	10.5	0.3	0.2	34	89.5	2.3	1.3	38
1960 - 1969	46	22.4	4.0	1.8	159	77.6	10.9	6.1	205
1970 - 1979	116	27.0	10.0	4.4	314	73.0	21.5	12.0	430
1980 - 1989	401	39.7	34.5	15.3	609	60.3	41.7	23.2	1,010
1990 - 1999	283	60.6	24.3	10.8	184	39.4	12.6	7.0	467
2000+	309	66.6	26.5	11.8	155	33.4	10.6	5.9	464
Totals	1,164	44.4	100.0	44.4	1,460	55.6	100.0	55.6	2,624
Source: Author's Tabulation of Rental Gated Community Database									

Property Management

Rental communities have a broad range of management structures. Many of course are run by a single proprietor landlord but this is not the norm. The property management industry is operated by many types of corporate structures including REITS (Real Estate Investment Trusts) and large real estate firms that perform their own property management. These large real estate firms could be private or public, some of them built new apartments, other just buy and sell existing

properties. More often, these larger firms subcontract out the management functions to smaller companies specializing in property management functions. In addition, with the advent of the various subsidies available for rental housing, more complex public/private relationships have emerged that also manage property. But often these nonprofits at times subcontract out the management to those same specialized property management firms.

The RGCDB contains this information in attempt to get a handle on how gated communities are managed. It is important to note that it was difficult to discern at times whether the specialized property management firm owned the property (which they sometimes did) so for the purpose of tabulation, these two categories were merged with the large real estate firms. Although it was sometimes difficult to categorize some properties, these data provide baseline estimates of how gated and nongated properties are managed.

Table 3-11 displays the management structure gated and non-gated properties. The vast majority of all properties are managed professionally by large corporations. It is also evident that these large firms more often own and operate properties that are gated. Privately owned apartment complexes, which are generally smaller properties and many times older are less likely to be gated. The same is true of those properties that have some sort of subsidy attached to them (Nonprof/Govt category). Interestingly, those properties that are owned/operated by for-profit developer/non-for profit partnerships are about equally likely to be gated.

Table 3-11 Property Management

Management	Gated	% of Mgt Type	% Gated	Nongated	% Nongated	% of Mgt Type	Total
Prof. Mgt/RE Firm	845	56.8	71.7	643	62.5	43.2	1,488
REIT	214	59.0	18.2	149	14.5	41.0	363
Private owner	71	36.2	6.0	125	12.1	63.8	196
Nonprof/Govt	44	28.8	3.7	109	10.6	71.2	153
Private/Nonprof.	4	57.1	0.3	3	0.3	42.9	7
Totals	1,178	53.4	100.0	1,029	100.0	46.6	2,207

Source: Author's tabulation of the RGCDB

The trends for the pooled data are similar for the county level data. However, the Inland Empire counties are more likely to have gated properties professionally managed by large companies than those properties located in Clark and Maricopa counties. On the other hand, REITS seem to be present more rental gated communities in Clark County than in the other counties. Gated communities in the other counties are management by REITS in almost the exact same proportion.

Table 3-12 Percent Gated and NonGated Properties by Property Management Type

County	Professional Mgmt		REIT		Private Owner		NonProfit/Gov't		Private/Non-Prof		County Totals
	% Gated	% Non Gated	% Gated	% Non Gated	% Gated	% Non Gated	% Gated	% Non Gated	% Gated	% Non Gated	
Clark	36.6	32.2	12.0	9.4	2.7	3.0	2.3	1.9	0.0	0.0	566
Maricopa	35.9	30.5	8.9	6.8	3.8	8.3	0.5	5.2	0.0	0.0	995
Riverside	42.2	24.6	8.9	3.1	1.5	3.7	3.7	10.8	0.9	0.6	325
San Bernardino	44.9	24.3	8.7	5.6	4.0	4.0	4.4	3.4	0.3	0.3	321
Totals	38.3	29.1	9.7	6.8	3.2	5.7	2.0	4.9	0.2	0.1	2,207

Source: Author's tabulation of RGCDB
Note: Mgmt=management;gov't=state or federal government; nonprof=nonprofits, REIT=Real Estate Investment Trust

Prevalence of Hispanics in Rental Gated Communities

One of the more interesting and unexpected findings in the Sanchez, Lang, Dhavale (2005) research using the American Housing Survey was the incidence of Hispanic households in rental gated communities when compared to all White and Black renters (see Table 2-3). While the spread in percentages was not particularly large, the data did suggest that it would be worth confirming whether this was unique to the AHS or if this was true across other databases.

In order to get a sense of how prevalent this was in the study area, I chose to develop a proxy measure. The online apartment listing services provided two sources of information that I was able to collect that suggested that the properties were advertising in order to attract this demographic. First, the listing would indicate that either the staff or at least one person in management spoke Spanish. Second, one of the listing services publishes a version of the same

listings in entirely in Spanish. If the property listing had either of these "flags," I considered the property actively marketing to Hispanics. Table 3-13 displays these results. What is evident that these results seem to confirm the Sanchez, Lang, and Dhavale (2005) findings. Gated properties were more likely to market to Hispanics of all the properties that were marketed in one form or another to Hispanics. This was true in all four counties in the study area. This tendency is most dramatically seen in Riverside and San Bernardino counties where the number of gated communities marketing to Hispanics is more than double the nongated communities that market to Hispanics.

Table 3-13 Properties that Market to Hispanics

	Marketed to Hispanics	% of Total Properties	Not Directly Marketed to Hispanics	% of Total Propeties	Total Properties
All Properties					
Gated	312	23.0	1,046	77.0	1,358
Nongated	198	10.3	1,717	89.7	1,915
Total	510	15.6	2,763	84.4	3,273
Clark					
Gated	72	22.2	253	77.8	325
Nongated	69	18.5	303	81.5	372
Total	141	20.2	556	79.8	697
Maricopa					
Gated	90	15.4	495	84.6	585
Nongated	68	6.9	921	93.1	989
Total	158	10.0	1,416	90.0	1,574
Riverside					
Gated	69	31.4	151	68.6	220
Nongated	30	10.6	253	89.4	283
Total	99	19.7	404	80.3	503
San Bernardino					
Gated	81	35.5	147	64.5	228
Nongated	31	11.4	240	88.6	271
Total	112	22.4	387	77.6	499

Source: Author's tabulation of the RGCDB

Security and Rental Gated Communities

After visiting quite a few rental gated communities in Southern California and Arizona, I began to notice that gates were not the only security measure provided by apartment complexes. Non-gated complexes also provided additional level of security on some properties, most often security guards.

When compiling the RGCDB, I was able to collect data on the various levels of security both physical, mechanical and human that are present on these properties. As Table 3-14 points out, many properties provide a combination of many different types of security such as courtesy patrols (which is an euphemistic name for a security guard) or gated parking. Another observation that came from field observations is that many properties do not close their gates during business hours. Property managers reported several reasons for this. First, some leasing offices are not accessible for prospective tenants unless the gates are open. Second, keeping the gates open reduces the number of times the gates need to be repairs. Apparently gates fail quite often partly because of the number of times they open during the day for repairs, deliveries and residents. Some properties have solved this problem by gating only the parking areas or just the pedestrian areas.[16] Field work suggests that less upscale properties keep their gates open during the day.

Keeping the gates closed for the full day, based on these anecdotal accounts is an expensive enterprise because it requires employees to open the gate during the day for workers, prospective tenants and to keep the gate in good repair (from overuse). Thus, it was not surprising to me to find that gates that are closed all the time have been advertised as an amenity and are more often found in the expensive gated communities. Similarly the incidence of guard gated communities was limited to these same upscale properties. In fact, some properties not only gate the perimeter of the property but provide additional gating around parking or some sort of barricaded garage. Gates that

[16] I was unable to get systematic data on how often pedestrian areas are gated and locked.

have been put up after the property was operational have been referred to as retrofitted gates. These retrofitted gates, while often put up after increased crime incidents on a property, are also advertised as an amenity or as a strategy to reposition a property after a new owner takes over the property.

Table 3-14 Types of Security on Gated Properties (in number of properties)

Forms of Security	All		Clark County		Maricopa County		Inland Empire	
	Gated	Total	Gated	Total	Gated	Total	Gated	Total
Courtesy patrol or security guard	172	332	65	127	46	104	61	101
24 Hour Gate	14	14	9	9	3	3	2	2
Courtesy patrol and 24 hour gate	8	8	6	6	0	0	2	2
Guard gated, 24 hour gate	4	4	3	3	0	0	1	1
Gated Parking	15	15	3	3	9	9	3	3
Retrofitted gate	54	54	8	8	32	32	14	14
Courtesy patrol and gated parking	5	5	3	3	1	1	1	1
Courtesy patrol and retrofitted gated	6	6	1	1	2	2	4	4
24 hour gated and gated parking	5	5	0	0	0	0	5	5
Courtesy patrol, 24 hour gate and retrofitted gate	1	1	0	0	0	0	0	0
Totals	284	444	98	160	93	151	93	133

Source: Author's Tabulation of the Rental Gated Community Database

Subsidized Properties

Part of this investigation was to determine how many gated properties were built with some type of subsidy. As I began to collect this data, it became very difficult to accurately determine if a property was indeed subsidized, let alone determining which subsidy or subsidies were used. The online databases did indicate whether the property had some type of income restriction for renters but did not always indicate which one. In addition, California in particular presented problems with matching these properties to the correct subsidy(ies) because the state provides many additional

subsidies that mimic some of the federal programs. Matching was further complicated by counties that have their own programs. Furthermore, lists provided by the state for federal programs were not always accurate. Thus, the numbers reflected in table 3-15 are accurate to the best of my ability to assess the sources from which they came. In addition, because it was difficult to pinpoint the source of the subsidy, I tallied the number of properties based on whether there was an indication that a subsidy was used on the property.

Table 3-15 Gated and Nongated Rentals with at least one subsidy by County

All Properties	Subsidy	%	No Subsidy	%	Total Properties
Gated	307	22.6	1,051	77.4	1,358
Nongated	503	26.3	1,412	73.7	1,915
Total	810	24.7	2,463	75.3	3,273
Maricopa	**Subsidy**	**%**	**No Subsidy**	**%**	**Total Properties**
Gated	134	22.9	451	77.1	585
Nongated	257	26.0	732	74.0	989
Total	391	24.8	1,183	75.2	1,574
Riverside	**Subsidy**	**%**	**No Subsidy**	**%**	**Total Properties**
Gated	56	25.5	164	74.5	220
Nongated	117	41.3	166	58.7	283
Total	173	34.4	330	65.6	503
San Bernardino	**Subsidy**	**%**	**No Subsidy**	**%**	**Total Properties**
Gated	58	25.4	170	74.6	228
Nongated	70	25.8	201	74.2	271
Total	128	25.7	371	74.3	499
Clark County	**Subsidy**	**%**	**No Subsidy**	**%**	**Total Properties**
Gated	59	18.2	266	81.8	325
Nongated	59	15.9	313	84.1	372
Total	118	16.9	579	83.1	697

Source: Author's tabulation of the RGCDB

Table 3-15 indicates that the ratio of gated to nongated properties that used some type of subside is fairly equal in most of the study area. Riverside County, unlike the other counties, proved

the exception, where the nongated apartments more often employed a subsidy. Given the anecdotal reports of property managers about the expense associated with gates, it is not surprising that the number of nongated subsidized apartments exceeds that gated versions. Also, Riverside leads in the total percentage of subsidized housing with over a third of the properties in the sample having a subsidy.

Discussion

The closer examination of the rental gated community characteristic in these southwestern counties has mirrored national trends discussed in chapter 2 but revealed quite a few new traits. I will review the chapter's findings based on how rental gated communities in these regions follow national trends followed up a summary of characteristics uniquely derived from the RGCDB.

The RGCDB seems to capture the relatively high percentage of apartment units/properties in these metropolitan areas that re gated. The percentage of rental properties is significantly high about 40 percent (on average). Thus, renters will find it increasingly difficult to live in ungated rental communities in these counties if current trends hold. The choice of ungated or gated apartment complexes is particularly restricted in Las Vegas where nearly 50 percent of properties are gated.

Another trend that mimics national patterns is that the age of gated rental properties are newer than their nongated counterparts. This pattern also does not bode well for those renters that would prefer to live in newer properties without gates because their choices look to be more and more restricted. At some point, in order for all multifamily properties to remain competitive, owners will have to recognize that gates should be considered a commonplace amenity much like a pool.

The higher rent associated with rental gated communities, while somewhat a function of newness, will wreak havoc on the affordability of apartment units in these metro areas. Indeed, qualifying incomes to rent these gated apartments is fast approaching the AMI for these counties. At

the same time, since rent is used as a valuation measure for commercial properties, these properties also become ripe targets for condo conversions under the right market conditions.

The RGCDB also confirms Sanchez et al.'s (2005) that rental gated communities are actively marketing to Hispanics. It is difficult to discern from the data whether this is due to the market preference of Hispanics, the high population of Latinos in the study area or perhaps even a concerted effort to comply with fair housing laws. This would be an interesting direction for future research.

This chapter also points out that there are many layers to security embedded in rental gated communities in addition to the gates. The variety includes roving patrols, pedestrian gates, guard gates. The purposes of the gates themselves are open to question as well because they are not closed all day and night in many cases, particularly in those lower income communities. My interpretation, based on pure conjecture, is that property owners only see a need to protect residents and their property only when the management is not present. That is, they might feel that safety is not an issue during the day but at night. Property managers also express the convenience factor of having the gates open during the day for maintenance and deliveries. The mere presence of that gates during the day seems purely ornamentational (or a selling point for the community), and not functional as they are after hours.

The proliferation of RGCs and gated communities in general suggests that there might be some positive benefits to these types of community. The next chapter identifies and details 22 positive functions that gated communities offer based on current literature.

Chapter 4

The Positive Functions of Gated Communities?: Theoretical Reflections on the Purpose of Gated Communities in Modern Life

What boots it at one gate to make defence,
And at another to let in the foe?

John Milton
Samson Agonistes. Line 560.

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Introduction

One of the first researchers to delve into a deeper understanding of post World War II suburbs was the sociologist and urban planner, Herbert Gans in his now classic book *The Levittowners*. (1967). This book was one of the first scholarly attempts to debunk public notions about the homogeneity of suburban neighborhoods. Researchers have now recognized that although the suburbs have retained some of these characteristics, the landscape has changed significantly in terms of class and diversity since that time (See for example Palen 1995; Knox 2005; Davis 1990, 1998). This chapter explores a modern equivalent to the rather thorny neighborhood dynamics of diversity that have evolved since the *Levittowners* was published.

This study also analyzes a neighborhood type that has been around for more than 20 years in some parts of the United States but has remained virtually invisible to researchers—the rental gated community. Because gated communities, both rental and owned, have now in many cases have been around for more than a quarter century, it is important to consider why this is so. To do this, I take a different approach than merely weighing the relevance of recent research on gated communities to this study. Rather than focusing on the entire gated community literature (and the decidedly negative conclusions that this research tends to reach) I will consider the benefits that gates and

walls confer to residents and perhaps the communities where they are located. While some of this discussion has a somewhat tongue-in-cheek tone, this perspective developed by Herbert Gans in his 1972 article on the *Positive Functions of Poverty*, offers what I believe is a useful exercise to understand why communities and residents place such a high value on these places.

But before detailing Gan's "Functional" approach, Georg Simmel's theoretical notions of why boundary creation is so socially important will be explored first. After applying Gan's approach to gated communities, the next chapter will consider the theories underlying the "Community Question" to evaluate the urban theoretical traditions gated communities fall into. Barry Wellman, as a way to classify the theoretical contributions of major urban and community sociologists such as Tonnies, Durkheim, Park, and Gans among others, developed the broad categories of "Community Saved" or "Community Lost" where he sorted these theorists depending on their perspective. These concepts will be developed later as a means to determine whether there are positive benefits to communities based on Wellman's nomenclature (Wellman 1979; Wellman and Leighton 1979; Connerly 1985; Lupi and Musterd 2006; Webber 1966; Suttles 1972).

Simmel on Boundaries and Doors

Janus am I; oldest of potentates;
Forward I look, and backward, and below
I count, as god of avenues and gates,
The years that through my portals come and go.

Henry Wadsworth Longfellow
The Poets Calendar 1886-1891

Georg Simmel was an early thinker on the functions of boundaries and openings particularly in terms of the dualities created by these transitional spaces such as separation and connections or distance and proximity. One of the more interesting characteristics of gated communities arises from the dualities of the gate itself and the boundaries created. While Simmel does not directly consider gates and walls, he wrote a seminal piece called "Bridge and Door" in 1909 (Simmel 1994

orginal 1909) and a small section on "Boundaries*"* in his larger work *Soziologie* that apply here (Simmel 1908; Fearon 2001).

According to Simmel, social interactions between humans begin when space is divided and bounded. In fact he suggests that humans have a natural tendency to divide space. Bounded space has five dualistic functions. First, bounded space creates its own social order that integrates and exercises authority over its members while simultaneously influencing relations outside the boundaries. Second, boundaries define conflictual relationships with those outside its sphere of influence, exclude all who surround it, and create distance and unity (Simmel, 1994; Fearon n.d; Simmel, 1994; Simmel, Frisby and Featherstone 1997; Lechner 1991). Third, Simmel argues that setting boundaries creates a special type of relationship between the inhabitants. He asserts when the bounded space is purposely insular, those inside the space do not want to have an effect outside the boundary. Fourth, boundaries produce offensive and defensive functions between neighbors that may be conflictual (which is a topic that Coser takes up in his 1956 book the *Social Functions of Conflict*) but are mostly expressed as indifference (Simmel, Frisby and Featherstone 1997; Coser 1956). Finally, boundaries must be created and accepted by members inside the space. For instance, in the *Social Construction of Communities*, Suttles (1972) describes the concept of a defended neighborhood as a residential area that has sealed "itself off through efforts of delinquent gangs, restrictive covenants, by sharp boundaries or by forbidding reputation" (Suttles 1972:21). He also observes that if outsiders rather than the residents define the neighborhood's boundaries that these residents report an impermanent and transient feeling to the neighborhood because they were not involved in the process.

Doors or gates to Simmel also have dualistic functions.[17] Gates both separate and connect—a social experience that Simmel argues is the same act. Atkinson and Blandy (2005:180) observe this feature of gated communities when they remark: "Where the wall starts a new social area begins, whether one lives inside or out." Simmel also notes that because gates can be opened, its closure more strongly isolates those within. Conversely, when open or removed, people tend to feel free because they can leave the boundaries. Thus, gates function as confining and freeing as the point of potential interaction with both sides of the boundary. This function is important to the human condition because, Simmel claims, people "cannot connect without separating" because of what he asserts is a natural tendency to separate (See also Marcuse 1997:103). Indeed, this principle has been observed in the gated community literature by Manzi and Smith Bowers (2004:36) who argue that "the principles of privatism and cohesion may not necessarily be mutually exclusive."

It will be obvious throughout this chapter that this same dualistic tendency is exhibited in many other traits of gated communities where many positive features also are negative. For instance, gated communities both attract and prevent crime (Blakely and Synder 1997; Manzi and Smith-Bowers 2004). Further, Marcuse (1997) expounds extensively about the dualities of walls in terms of whether the presence of walls provokes fear or provides safety. Yet, the literature focuses mostly on the negative features rather than to consider what benefits gates may confer (Grant and Mittelsteadt 2004; Manzi and Smith Bowers 2004).

This same literature almost universally concludes that gated communities represent a deep loss of community or what Wellman would refer to as "Community Lost."[18] But is that really the case? The worldwide proliferation and staying power of the gating phenomenon suggests that there is more than meets the eye. Indeed, more recent literature such as Smith –Bowers (2006) and Lee

[17] The word door in German can also be translated to gate. For the sake of argument here, I will assume that it means gate. Marcuse (1997:103) points out that the words for fence and wall is derived from the word for town.
[18] Some exceptions are Newman (1996, 1995, 1980, 1972) and Cisneros (1995), Jencks (1997) and Nelson (2005, 2003); Manzi and Smith-Bowers 2004a, b, Smith-Bowers 2006; Lee and Webster 2006.

and Webster (2006) are wrestling with the notion that gating represents more complex social and governmental processes than meets the eye.

Gans's Functional Analysis of Poverty

Herbert Gans, more known for his community studies, has written extensively about poverty. Of particular interest here is a famous paper he wrote 1972 paper entitled "The Positive Functions of Poverty." His paper uses the sociological perspective known as functionalism.[19]

I use functional analysis here because the continued prevalence of gated communities both here and abroad suggests that there has to be some social benefit to those inside the gate and perhaps, as Simmel contends, those outside the gate. Functional analysis will reveal what these may be. Gans's article begins by reviewing Robert Merton's (another leading functionalist) reasons for undertaking functional analysis. Merton was interested in understanding the positive functions of those "persistent social patterns and structures"… "which are at the time not adequately fulfilled by other existing patterns and structures" (Merton as quoted in Gans 1972:275).

Gans then defines functions much as Merton does as "those observed consequences which are positive as *judged by the values of the groups under analysis*; dysfunctions as those which are negative by these values" (Gans 1972:276 emphasis in the original). I will follow the same criteria of judging those positive functions based on those who benefit from gating. These groups range from the residents themselves (of various socioeconomic strata as discussed below), developers, and multifamily apartment owners to the municipalities that contain them and perhaps even criminals. I

[19] Before beginning this functionalist analysis, I offer a couple of caveats. First, I do not necessarily believe that gated communities are good neighborhood form. Although I am focusing mainly on positive functions, I intend to highlight the negative functions of gated communities or "dysfunctions," primarily as a point of comparison or to draw attention to the trait's positive and negative duality where appropriate. Second, as the title suggests, I write this paper in the spirit of Herbert Gans's (1972) article on the positive functions of poverty. As Gans, and two other noted functionalists, Merton (1957), and Parsons (1975) argue, the functionalist perspective here, as in their works, is not conveying any normative point of view but to explain why gated communities have appeared, proliferated, and persist over the last generation. I take them at face value on this.

follow Gans's format in dividing the functions into three major categories: economic functions, socio/cultural functions and political. The political category is expanded somewhat from Gans's to include not only politics but policy and urban governance, themes that have evolved in urban planning and gated community research.

This list is by no means exhaustive but a literature review has yielded 22 positive functions of gated communities: nine economic, seven social/cultural and six political/ governance functions. Within each of these major categories are a number of subvariant functions that are discussed. Some of them are commonly cited characteristics of gated communities and others are drawn from more subtle interpretations of how gated communities work. See tables 4-1, 4-2 and 4-3 for summaries of these functions.[20]

[20] Please note that because there very little written about specifically about rental gated communities, this literature reviews the general gated community research. The research is also germane to rental gated communities in part because rental gated community complexes are often part of a larger master planned community thus much of this material applies to rental gated communities as well.

Economic Functions

Table 4-1 The Positive Economic Functions of Gated Communities	
1.	**Investment Protection** 1. Property Value Preservation 2. House Value Premium
2.	**Reduces Uncertainty through Predictability** 1. Predictable space 2. Predictable neighborhood Future; prevents decline and ensures neighborhood sustainability 3. Predictable behavior or deviance (Social Control) 4. Manages risk
3.	**Can produce affordable housing** 1. Gated communities are built with necessary higher densities for cost savings 2. Rental gated communities already use many subsidies both in public housing and market rate apartments 3. Can be a pool of potential condominium conversion units that are affordable to those in more expensive single family home markets 4. Can offer more housing opportunities for minorities because they are in newer housing markets 5. Can support mixed-tenure developments 6. Serves all income levels
4.	**Persistent Source of Jobs for the Poor and Immigrants**
5.	**Creates New Professions, Industries, Associations, and Programs to Serve and Manage Gated Communities** 1. Community Association Managers 2. Gate and security system inventors, manufacturers, installers, servicers 3. New law specialty 4. New lobbying category 5. Security Guards 6. Specialty insurance products 7. Mediators/Arbitrators 8. Home service workers (housekeepers, landscapers and other groundskeepers) 9. Third-party program creators
6.	**Allocates scarce resources more efficiently** Scarce resources are better enclosed; open access resources suffer from overuse
7.	**Product Standardization** Standardization of environments in global cities makes mobility more comfortable for -Multinational companies -Corporate "relo's," i.e., international business employees -Tourists in resort communities
8.	**Marketing Tool** 1. Draws buyers to remote greenfield locations that don't have urban amenities 2. Uses common worldwide images that evoke prestige of US gated communities 3. Draws buyers to gentrified parts of cities
9.	**Creates New Markets; Stabilizes others** -Infill and Gentrification -Allows higher density housing forms to sell; more profit for developers -New housing opportunities for minorities -International market for standardized product -Predictability and perfect information -Target for burglary -Market for gates and surveillance equipment and technology -Employment: Servicing and for Poor and Immigrants -New types of Insurance and Law Specialties -Allocates scarce resources more efficiently -Created new housing equity market because of raised awareness of need for property value protection -Products available for almost all income levels and tenure

1. Investment and Investment Protection

Property Value Preservation. Among the most oft cited reasons for the existence of gated communities is that they offer investment protection (See for instance Blandy and Lister 2004; Kirby et al. 2006; Grant and Mittlesteadt 2004; Blakely and Snyder 1997; McKenzie 1994; Blandy and Parsons 2004). As a person's house is often their largest investment, it makes economic sense to use legal, social or physical devices to preserve or even enhance value. Insurance is often the way to do this as with most other high ticket items but as Fischel (2001, 2004) notes, there is no home equity insurance that homeowners can buy (at least that is widely available currently) to protect the investment stake in the property. Gates have evolved as the functional alternative to this type of insurance particularly in the West. Since most of the housing in the eastern United States was built with exclusionary zoning practices in place prior to civil rights reforms of the 1960s and 1970s, the gated community form is less necessary there (Fischel 2001, 2004).

House/Property Value Premium. Based on several hedonic studies gates attract investment because of the price premium for houses in these communities fetch compared to those surrounding unenclosed neighborhoods (Kirby et al. 2006, Bible and Hseih 2001,LaCour-Little and Malpezzi 2001). Although this tends to be more the case for newer gated neighborhoods, a recent study by LeGoix (2007) indicates that over time, middle income and senior gated communities may actually lose value as the community is unable to maintain the cost of private governance and infrastructure upkeep. In those gated communities where the residents are extremely wealthy, the property value is maintained and even increases.

This increased value not only applies to house value but rental properties in terms of increased rent and property value. Hardin and Cheng (2003) compared rents on apartments with security measures such as gates with those with less security and found that those with more

security commanded more rent. Because rental property value is based primarily on the rental stream of the property, this translates into higher property values for multifamily operators.

2. Gated Communities Reduce Uncertainty through Predictability

One dimension of Fischel's (2001, 2004) *Homevoter Hypothesis* asserts that homeowners consistently act to reduce the risk associated with losing value of their largest investment, their home. Protecting home values involves diminishing uncertainties of neighborhood lifecycles (Frankel and Pauzner 2002; Harris 1999 and 2001; Crowder 2000; Cutler, Glaeser and Vigdor 1999; Parsons and Stevens 2004). While property condition is important to maintain and to overcome the drop in home value often associated with older homes, the other important indicator that concerns homeowners is, unfortunately, the demographic composition of the neighborhood. This tendency is not limited to just the white population but all races and ethnicities. All homeowners believe that there are predictable characteristics of neighborhoods that are wealthier and whiter such as property maintenance and good public schools. Indeed, Ellen (2000:1529) argues that "individual choice is not the present racial concentration of mixed neighborhoods but rather assumptions about what the structural strength of such neighborhoods will be in the future."

Furthermore, Harris (2001 and see also 1999) in a study of why blacks and whites do not like to live near black neighbors finds that preferences for white neighborhoods derives from two different but related attitudes. Race is the most powerful motivator for white but for blacks, white neighborhoods are seen to be wealthier and safer, or have a stronger sense of order. And as Waldrop (2004:99) asserts "gating is one among several means used to re-establish a sense of order."

3. Managing Risk through the Creation of Predictable Space

Order not only depends on reliably estimating who will live in the neighborhood but managing or controlling those who have access to the neighborhood. Maher's (2004) observed a

regular pattern to how minority laborers are regulated within an Orange County gated community space:

> …service workers were visible only when there was some apparent work related reason. Gardeners stayed close to their trucks and tools. Child-care providers were generally visible only when in the company of their employers' children. Housekeepers were rarely visible. The only instances in which home owners reported seeing female service workers alone was when they were coming to work, walking to the bus stop, or waiting for a ride. Many domestic workers in South Orange County depend upon public transportation, such that suburban neighborhoods tend to have a mass exodus of Latina pedestrians at the end of the workday toward the bus stop. This moment of visibility has come to be part of the expected social landscape and among Ridgewood residents did not seem to incur any anxiety, given that there was a work-related explanation for it (Maher 2004:794-795).

Thus, creating a "predictable space" to preserve order manages risk and thus property value is another positive function of gated communities (Manzi Smith Bower 2004). Predictable space is important as Ellen (2000) argues because it sets up expectations of a neighborhood's future to the best that can be estimated from this type of limited information.

Predictable space extends not only to workers who service these areas but to those within the walls. The formal social control embedded in the CC&R's lays down a set of predictable behaviors or conversely predictable levels of deviance. (Maher 2004; Ellen 2000). This type of contractual commitment becomes necessary because it is sometimes difficult to encourage people to take responsibility for the social control of their neighborhoods. Merry (1981) observed that left to their own devices combined with the spatial configuration of a particular neighborhood (in terms of the how visible or desolate areas around neighborhoods affect behavior) and the demographic composition, people may or may not intervene in the social control of a neighborhood. Thus, so the logic goes, it is impossible to predict how behaviors will be controlled without the intervention of a contractual agreement to allowed behaviors.

Because the permitted behaviors are spelled out, gated communities also allow for what is sometimes called self-help or community policing. Self-help policing involves neighbors who are somewhat coerced into providing for their own safety but gain the control of the neighborhood

lifecycle to stem decline and maintain long term sustainability of the neighborhood(Lee 2004:35 Maher 2004:790).

4. Can produce affordable housing

Gated communities are not built just for the wealthy anymore; indeed many gated master planned communities have been built with a range of housing types and tenure and at various densities. Because of the higher densities allowed, the houses built at these densities are usually more affordable, many times subsidized by the larger homes in the community. Thus, a positive function of gated communities is that they can provide a means to produce affordable housing. (Boddy 2002; Williams 2001; McKenzie 2005; Manzi and Smith-Bowers 2004:31; Grant 2004). Indeed, both owned and rented gated communities are priced at a wide range of incomes from weathly to blue collar (Kirby et al. 2006), to public housing (Danielsen 2007; see also Sanchez, Lang Dhavale 2005). As I will reveal elsewhere (see chapter 6) many rental gated communities are part of larger master planned communities thus, gated communities also support mixed-tenure developments that provides a situation where wealthy and poorer live relatively near each other (Maher 2004:787; Manzi and Smith Bowers 2004:30; Minton 2002:4)

Rental gated communities also represent a pool of potential condominium conversion units that are affordable to those in more expensive single family home markets (see above and Danielsen 2007). Theoretically, gated communities both owned and rented may offer more housing opportunities for minorities because they are in newer housing markets (Danielsen 2007; see also Crowder, Tolnay and Adelman 2001; South and Crowder 1998; Fischer 2003).

4. Source of Jobs for the Poor and Immigrants

One of the functions that Gans observes about the persistence of poverty is that capitalistic societies need an underclass population in order to fulfill less desirable jobs. Many of the jobs he noted back in 1972 are found in great quantities in gated community settings such as landscaping,

pool maintenance, nannies, garbage collection, or house cleaning. Indeed, in South American countries, poorer neighbors welcome gated communities as a steady source of employment (Webster and LeGoix 2005; Caldeira 2000,1996; Salcedo and Torres 2004). Maher (2004 and 2003) Hondagneu-Sotelo 1994).

5. Gated Communities Create New Higher Skilled Professions, Industries, Associations, and Programs to Serve and Manage These Communities

Gated communities, while providing an employment base for many minorities and immigrants, has also spawned several niche professions and expanded other industries to meet the growing demand for these related services.

Community Association Managers are a relatively new profession created specifically to manage issues arising from operating large master planned communities that differ from managing rental properties. While these professionals are similar to property managers, there are differences related to the common interest ownership of the development (Lynch 2001). These managers are also certified by the Community Associations Institute (CAI), an advocacy organization in Alexandria Virginia that has also gained momentum not only as a credentialing organization but as a lobbying organization created in the early 1960s to represent and serve common interest communities.[21]

A new law specialty has emerged not only to lobby for the interest of these organizations but to take care of legal matters associated with executing new Homeowner Associations and the lawsuits that arise from the various disputes between residents, developers and the local government

[21] There are various credentials offered depending on the function of the manager or management company. See the CAI website for examples of credentials: www.caionline.org/about/designations.cfm.

(Hyatt 2000; McMahon 1999).[22] Related to this, there are mediators and arbitrators that are specially trained to deal with these disputes (Avgerinos 2004)

Industries and services that have expanded as a consequence of gated communities are gated and security system engineers/ inventors, the manufacturers, specialty installers, those who maintain them (Falzon 2004:157; Roitman 2004; McMahon 1999). Security guards are another profession that has expanded as a result of gated communities (D'Alessio, Eitle, and Stolzenberg, 2005; Davis 1998; Barkan and Cohn 2005). There are also new specialty insurance products that protect of community association board members from liability associated with potential housing or employment discrimination, architectural disputes, inadequate reserves, and negligence.[23]

The convenience of gated communities has also expanded more traditional types of home service workers housekeepers, landscapers and other types of groundskeepers (eg. painters, carpenters). The homeowner association fee paid by residents allows them to forego exterior maintenance of the community. While the management company employs much of these workers, individual homeowners also hire additional workers to maintain the interior of the home or to enhance their own property (Falzon 2004; Hondagneu-Sotelo 1994).

6. Allocates scarce resources more efficiently

Gated communities offer a solution for reducing what Garrett Hardin (1968) referred to as the "Tragedy of the Commons." Hardin paints a picture of an enclosed common area where all users when left to their own devices, would seek to maximize their gains without regard for others. While the commons in this case is enclosed, without regulation, Hardin notes that the common resource does not last very long and suffers from overuse. Thus, the moral of Hardin's tale is that

[22] CAI sponsors an ethical organization of these specialized attorneys called the *College of Community Association Lawyers* www.caionline.org/ccal/index.cfm.
[23] See for example www.chubb.com/businesses/csi/chubb798.html. CAI also offers professional designations for those insurance companies that offer this type os insurance (www.caionline.org/about/designations_cirms.cfm).

scarce resources are better enclosed but enclosed with restrictions to ensure that all members have mutual access or what Hardin calls "mutual coercion, mutually agreed upon" Hardin 1968:1247). A more modern term for these mutually coercive dictates is the CC&Rs that come with owned gated communities and those rental gated communities that are part of larger master planned communities.

Lee and Webster (2006) apply much of Hardin's notions of the inherent instability of public commons to gated communities and confirm some of Fischel's (2003) notions that contractual enclosed urban spaces are an efficient evolution of modern governmental processes. They contend that it has been necessary for urban societies to "search for effective ways of organizing cities." (Lee and Hardin 2006:41). From their perspective it is too expensive to fix the public realm to accommodate the services delivered by gated communities because "To design, create and administer a system of rights is a costly business" (Lee and Webster 2006:36). As governments continue to shrink and political will lacking, gated communities are the functional outcome of these trends.

7. Product Standardization

While the construction industry has not globalized in the same fashion as multinational corporations, building techniques have reached a modest level of standardization around the world (Coy 2006). Some of these techniques and popular US urban forms such as gated community are regularly shared at trade organizations such as the Urban Land Institute in Washington DC.[24] Gated community products have thus become fairly standardized around the world.

[24] In my experience working at the Urban Land Institute, it was not unusual to have developers from all over the world attending conferences on how to build master planned communities. I particularly noticed the most interest from developers in Latin American and South America (particularly Argentina and Brazil) where there has been the some of the greatest proliferation of gated communities over the past 15 years or so.

The positive function of standardization is primarily to attract and to make familiar environments in global cities more comfortable for corporate "relo's," or those international business employees that must relocate around the world. In addition, these same type of developments are aimed at tourists in resort communities (Kuppinger 2004:48; Falzon 2004:152; Giroir 2003; Mycoo 2006; Coy and Pohler 2002). Despite deep cultural differences, the relo's and tourists can expect at least a minimum level of familiarity aimed at increasing comfort and reducing adjustment time. By reducing the risk associated with adjusting to new cultures, these types of gated communities represent an economic efficiency to being able to attract talented employees to places that are truly foreign to them.

8. Marketing Tool

Because of the standardization of gated communities, developers around the world can use common worldwide images or a gated community language that evoke prestige of the US versions as a way to market their products (Maxwell 2004; Kuppinger 2004:48; Falzon 2004:152; Coy 2006). Yet, gating communities offers developers a strong marketing advantage (in addition to the prestige factor) that they would not have in older housing development forms. As Murray Lee (2004:34) argues, gated community properties are sold on their "safety credentials." Maxwell (2004:6) finds evidence of this in Canadian marketing advertisements for gated communities which are "explicit about gates and security features." These "safety credentials," as Lee (2004) calls them, allow developers to attract potential buyers to parts of the metropolis that they might not normally venture much like relocating employees. For example, Manzi and Smith-Bowers (2004:30) have observed in gentrifying sections of London that developers use high density forms of gated communities to draws buyers transitional neighborhoods. Conversely, gated communities also allow developers to build in remote greenfield locations that do not have many services. High

level urban amenities such as restaurants and necessities such as schools and grocery stores are provided as part of the package. Developers are able to market the community as being self-contained (Falzon 2004; Leisch 2002; Luymes 1997). Raposo (2003) also finds that developers are able to create a prestigious air about newer areas in an urban area that have no existing class labels.

9. New and Expanded Markets and Stabilization

Gated communities are more than a marketing tool; they are the basis of new markets. For instance, gated communities aid in creating new demand for infill and gentrification in areas that otherwise would not be attractive to wealthier buyers. Likewise, there is now an international market for a standardized gated community market.

Markets for gates and surveillance equipment have expanded as a consequence to the growth of gated communities. The most obvious is that the wealthy are not the only target as developers are building this product to meet demand at many price points, for both renters and homeowners and as some have suggested more housing opportunities for minorities(Kirby et al. 2006; Danielsen 1997; Wilson-Doenges 2000). Developers also reap the profits from building higher density housing forms. Job markets have swelled to accommodate demand for new types of insurance and law specialties as well as for those workers who directly service these communities such as landscapers, housekeepers and the like.

From an economist's perspective gated communities offer many functions that are cost effective including allocating scarce resources as noted elsewhere. The property value stabilization created by gated communities offers owners, developers, and insurance and financial institutions nearly perfect information on the likely future course of the investment because the potentially variable neighborhood conditions are controlled. Thus, the risk associated with the investment is diminished, a factor that allows for more favorable financing for both developer and owner.

A positive function (somewhat tongue in cheek) from is that gated communities are fertile grounds for burglars. This is the case for a couple of reasons. The most obvious positive function is the wealth and prestige usually associated with these neighborhoods (whether true or not). Moreover, gated communities often tend to be vacation homes and because people are not occupying them year round; gates theoretically reduce the incidence of crime. Without gates, these types of second homes are an easier target.

Finally because housing represents the largest investment of most people, gated communities are part of a larger awareness for the need for property value protection, a new market is emerging for home equity insurance (often called home equity assurance).While gated communities are not the sole reason for the creation of this financial instrument, the basis for the need home equity insurance are bound up in many of the reasons that lead to the popularity of gated communities. For instance, traditional zoning has been a de facto home equity insurance program but reforms to exclusionary zoning practices has created, unfortunately, a need to find a legal way to do the same thing privately (Fischel 2001). As Fischel (2003) more recently points out, gated communities emerged to "rationally" protect homeowner property values include homeowner associations within large master-planned communities and condominiums. Homeowner associations force, through the CC&Rs (conditions, covenants and restrictions), a set of behaviors and obligations upon all homeowners that reduces risk and protects property values (Blakely and Snyder 1999; McKenzie 1996; Lang and Danielsen 1997). The CC&Rs give homeowners the power to enforce standards of property maintenance and social behavior upon their neighbors that traditional fee simple neighborhoods cannot.

Socio/Cultural Functions

Table 4-2 The Positive Socio/Cultural Functions of Gated Communities	
10.	**Manages Social Problems and Conflict** **Social Problems** 1. Avoids social problems 2. Encloses social problems 3. Prevents invasion and filtering **Manages Conflict** 1. Safety valve 2. Detached from neighborhood 3. Avoidance 4. Free of strife 5. Sedentary social control 6. Creates necessary social distance 7. Functions of Distancing -Helps individuals preserve a sense of voluntarism or choice. -Distancing seems to help develop a stable affiliation along a gradient which reaches from complete strangers to extreme intimates. -Distancing signals seem especially able to allow people to hint at and move between levels of intimacy without making themselves irreversibly responsible for their actions
11.	**Symbolic Functions** 1. Conveys prestige/Image/ Distinction 2. Emulation 3. Lifestyle and Quality of Life, Prestige (and prestige associated with social control or regulation)
12.	**Creating interior safety allows external neighborhood connection** 1. Housing as Haven 2. Wall of security 3. Need to gain control of neighborhood before can engage the neighborhood; resident empowerment 4. Age-restricted communities can lead to self-actualization of seniors because gated communities are haven and they feel they have supportive services outside gates 5. Preserves customs and lifestyles and strengthens social and identity ties through development of nets of reciprocity and help; helps defend interests 6. Creates social capital by demanding security improvements and is a bonding act that encourages social cohesion;
13.	**Safety from Outside** 1. Freedom from fear 2. Reduces crime 3. Protects cars 4. Reduces traffic 5. Safe for children
14.	**Expression of traditional housing forms** 1. Examples in Middle East, Chinese, Mexican Indian cultures as well as medieval walled cities 2. Chinese work-unit compounds -China's traditional culture of inwardly oriented private spaces and weak interaction between public and private based on lack of, or nearly nonexistent, civic services across historical government structures
15.	**Expression of modernization/globalization of less developed countries**
16.	**Stabilizes Community and Acts as Response to Diversification** 1. Gentrification and Infill -Can reduce white flight 2. Safety Valve 3. Allows newcomers/transients 4. New housing markets offer new housing opportunities 5. Creates necessary social distance between classes and, mostly by default, races 6. Gated communities can be either homogeneous or heterogeneous 7. Response of urban overpopulation of less developed countries 8. Maintains structure of privilege that form the underpinnings of a stable community

10. Manages Social Problems and Conflict

Another attractive function of gated communities is that most of the amenities that are provided are meant to promote an easy carefree lifestyle. An amenity that is not directly listed in any of the brochures is the convenience of not dealing with social problems outside the gate (Marcuse 1997; Roitman 2005). As an extension of Baumgartner's (1988) notion of "moral minimalism," gated communities are the next generation suburban neighborhoods that are designed, (rather than to develop naturally) to allow residents to avoid social problems (see also Low 2003, 2006).

On the other end of the spectrum, avoidance works in the other direction too. Because gated and walls are also used in public housing, some have argued that gated communities that are meant for security, enclose social problems rather than dealing with the problems head on (Brunson, Kuo and Sullivan 2001; Leavitt and Loukaitou-Sideris 1994 and 1995; National Public Radio 1998). The social distance created by the gate also prevents so-called "neighborhood invasion" and/or filtering of other groups into the neighborhood (Bogardus 1922).

As an extension of this idea, it can be argued that the right amount of social distance, that can be created by a wall and/or a gate, in a neighborhood, manages much conflict (Falzon 2004; Billig and Churchman 2003; Maher 2004; Manzi and Smith Bowers 2004:29). For instance, Billig and Churchman (2003) describe a situation in Israel where conflict is managed effectively when many different ethnicities of different income groups are separated by wall.

Social distance is important component to community life according to Suttles (1972:180-181). He outlines the following three functions of social distancing: distancing

- helps individuals preserve a sense of voluntarism or choice in the degree of involvement;
- seems to help develop a stable affiliation along a gradient which reaches from complete strangers to extreme intimates and 3.

- signals seem especially able to allow people to hint at and move between levels of intimacy without making themselves fatally culpable for their actions.

Thus, distancing allows for much flexibility and ambiguity that diminishes the amount of conflict to little or none.

In a similar vein, in theorizing about the functions of conflict, Coser (1957) portrays modern life as consisting of many low-level conflicts between people. Because they are low-intensity, he continues, that this serves as a safety valve against larger conflicts. Gated communities can also be seen as a crucible that allows for some of these low level conflicts to be managed indirectly through the third party rather than in the confrontational manner that suburbanites avoid. As such, people do not have much strife in their life because there is always a third party to intervene, yet another convenience provided by gated communities (Garreau 1991; Suttles 1972). Horwitz (1984) has coined a more appropriate term for the convenience embodied in the lack of direct confrontation as "sedentary social control."

11. Symbolic Functions

One of the stereotypical reasons attributed to the popularity and hence is a positive function that gated communities convey prestige to residents (See for example Blakely and Snyder 1997; Maher 2004; Luymnes 1997). Along this same line, the prestige promotes emulation among those who are not in gated communities, fueling demand for developers. Gated communities are also thought to provide a certain high quality of life. Images from gated community sales brochures are crafted to sell a certain lifestyle or at least the expectation of a certain lifestyle (Leisch 2002; Maxwell 2004; Thuillier 2005; Blandy and Lister 2005; Falzon 2004; Kuppinger 2004; Maher 2004). Maher (2004:795) even goes so far as to suggest that there is prestige associated with social control and regulation that comes with gated communities. Maher's argument is echoed by Lee

(2004) who contends that gated community residents buy these neighborhoods for their safety credentials.

12. Creating Interior Safety Encourages External Neighborhood Connections

One of the more interesting treatments of understanding the meaning of housing was written by Lee Rainwater (1966) about primarily public housing but housing for the poor in general. His thesis is that the main purpose of a home is to provide a haven from the outside world where the individual can feel safe. In poor neighborhoods, he argues, it is not possible to feel completely safe because of all the social problems that often come with poverty. He continues that when individuals do not feel their house is a haven from the outside world that the stress of worrying about safety causes much stress that affects the individual's everyday life. For example, stress is associated with health problems such as sleep deprivation.

But more important for application here is that the unease felt in unsafe neighborhoods causes the individual to withdraw from the unsafe outside and to disengage from the community. Thus, Rainwater contends that in order for people to engage in the community at large outside their home, they must first feel secure inside their home (Rainwater 1966). Counter intuitively, this reasoning suggests that the perceived safety provided by gated communities is just the ingredient needed for residents to engage their larger communities. Another reason that gates may be important is that it has been observed that poorer neighborhoods exhibit an unequal access to security from local police unlike more affluent areas of town that usually have a better relationship with local authorities (Atkinson and Flint 2003).

Oscar Newman (1995, 1996) and Henry Cisneros (1996) update this idea by applying the principles of defensible space idea to public housing. They argue that the safety created by the defensible space inside gates and walls around public housing are a form of resident empowerment.

In other words, by taking control of the residential environment allows residents the safety to use their neighborhood more often.

On the other hand, Marcuse (1997:101, 104) poses a more metaphysical question: Do walls provide security or do they create fear? His answer in short is that both outcomes come from the same source yet those higher in the hierarchy benefit more from walls but at a price, particularly to the community at large. For all the relief from fear that higher social classes enjoy, the resulting unequal relationship that walls produce is not worth the price to the community or those living inside the walls..

Other research has concluded that age-restricted gated communities have important psychological benefits for the elderly (Townshend 2002; Helenius-Maki 2003). She makes an argument similar to Rainwater (1966) that when the elderly, who are often frail, having a strong sense of safety and security, they can achieve self-actualization, particularly if they have additional supportive services outside the gates.

Manzi and Smith Bowers (2004:25) maintain that gated communities are a vehicle by which residents create the social capital needed to demand security improvements. The process of creating the social capital is a bonding experience that is the glue of future social cohesion. Roitman (2005) develops a similar notion that gated communities preserve residents' customs and lifestyles and by extension strengthens social and identity ties through development of nets of reciprocity and helps defend residents' interests. Tracy Gordon's study of gated community residents' voting patterns in Southern California reinforces the notion that gated community and their representatives advocate in their own behalf. She demonstrates that homeowned gated community residents' vote more often than those not in gated communities and that homeowner associations represent a powerful coalition within municipalities to defend and promote their interests.

Some of the more practical social functions that are mentioned in the literature are that gated communities reduce traffic, make the neighborhood safer for children and protect cars from theft and vandalism (Blakely and Snyder 1997; Manzi and Smith-Bowers 2005; Harris and Evans 1999; Darien 2003).

14. Expression of traditional housing forms

The study of gated communities has become a worldwide effort. Researchers have observed that contrary to the idea that gated communities are a completely new phenomenon (medieval walled cities notwithstanding), that gated communities actually express traditional housing forms in many cultures. Examples of these cultures are found in Arab countries, China, Mexico and India. Scholars have indicated that these forms probably survive more in traditional cultures that encourage inwardly oriented private spaces (i.e. less publicly accessible space). They are also characterized by a weak interaction between the larger public and private life based on lack of provision of civic services across historically weak government structures. Citizens are expected to fend for themselves in the provision of "public" services (Low, 2003 Glasze and Alkhayyal 2002; Wu 2005; Webster, Wu and Yanjing 2005; Kuppinger 2004; Falzon 2004; Miao 2003:49, 59).

15. Expression of modernization/globalization of less developed countries

While gated communities are, many times, expressions of traditional housing forms, the more modern forms of these neighborhoods signals the arrival of globalization in western countries as well as less developed countries. Many studies point to the stark contrast made by the image of a newer westernized gated community in a sea of more traditional neighborhoods in large cities worldwide from Hungary, South America, India, Egypt and South Africa to name a few. At some level this has been interpreted as signaling the advent of a country's modernization and the development of a middle class. On the other hand, others suggest that it represents the exploitative

elements that comes with globalization of developing nations (Maher 2004:801; Leisch 2002; Thuillier 2005; Kuppinger 2004; Falzon 2004; (Maher 2004: 801 US); Mycoo 2006; Coy and Pohler 2002).

16. Stabilizes Community and Acts as Response to Diversification

The underlying social function to gentrification and infill is that providing secured neighborhoods can reduce white flight and at the same time allow newcomers and transients to live in relatively close quarters if separated by walls and gated (Manzi and Smith-Bowers 2004 Lang and Danielsen 1997; Marcuse 1997; Webster and LeGoix 2005). Diversification, theoretically, can be better tolerated in the presence of gated communities because as noted before, gated communities function as a safety valve managing social problems and conflicts. This too also extends to the idea of the "necessary amount of social distance" necessary to separate classes but many times class lines also represent racial lines (Leisch 2002; Hondagneu-Sotelo 1994; Falzon 2004; Billig and Churchman 2003; Maher 2004). On the other hand, Falzon (2004:148) has argued that in other countries gated communities can provide community stability in either homogeneous or heterogeneous neighborhoods. Thus, gated communities may offer all potential residents more housing opportunities in newer less established housing markets (Danielsen 2007).

Finally, as will be discussed in more detail in the next chapter, Brint (2001) remarks that community stability has always been rooted in established hierarchies. According to some of the original sociological community studies the structure of privilege that is the foundation of a stable.

Political/Policy/Governance

Table 4-3 The Postive Political/Policy/Governance Functions of Gated Communities	
17.	**Offers more Regulation** 1. Private Zoning 2. Evolution of zoning (People want more regulation) and HOAs help enforce zoning outside gates 3. Private Club 4. Satisfies demand for more police protection
18.	**Promotes civic mindedness** 1. Residents vote more often in public elections 2. More residents are registered voters than those not in gated communities
19.	**Innovative, flexible, efficient and more powerful municipal government** 1. Wider latitude in land use control 2. Finer degree of control than zoning ordinance 3. Response to Tragedy of the Commons -Reduces free riders -Creates positive spillover in urban areas) -Reestablishes public goods (such as safe children's play area) -In specific locations gated communities can provide positive externalities, or be neutral in operations 4. A new, more flexible and efficient government form that does not totally mimic municipal government 5. Gated communities have more powers than municipal government -Can discriminate -Can admit people for money -Can limit the number of residents -Can enter into commercial activity -Can make commitments for life of community -Can hire and fire like corporations -Can terminate themselves and sell the neighborhood 6. More opportunities for self dealing 7. Debt collection powers 8. No checks and balances 9. No due process 10. Selective enforcement of governing documents is not subject to same scrutiny as public enforcement 11. Flexible for many different sizes of private cities (from 200 to 200,000 residents) 12. Efficient because gated communities provide the opportunity for collectively consumed goods to be provided by market rather than by public entities -privatizes civic services -enclosures are efficient means of conserving at-risk, congested and depleted resources -reduces free rider problems 13. Shifts high cost of new development to residents -Maintenance at higher level than municipality -Less taxation (in theory) -Less municipal cost -Extra policing -Allows governments to seek growth and more taxes with less expenditures -Allows public police more capacity elsewhere outside gated community 14. Public/Private Partnership -Municipality retains some powers that gated communities don't want to take on (cherry picking liabilities) 15. Applies rules and regulations evenly in municipalities with weak town planning 16. Decentralized local government that meets residents needs better than centralized government 17. Provides level of safety (real or perceived) that government cannot provide -Potential freedom from fear of crime -Potential to reduce crime -Protect cars -Other public safety demands met (eg. reduce traffic and increased safety for children)

Table 4-3 The Positive Political/Policy/Governance Functions of Gated Communities(Continued)	
20.	**<u>Supports many Urban Planning Values</u>** 1. Provides density and compact form 2. Communities are safe, quiet and private 3. Traffic calming and pedestrian friendly 4. Quality design 5. Communities amenities 6. Sense of Place and Community 7. Extension of cul-de-sac 8. Higher community surveillance 9. Protect environmental resources and open space 10. Conserve congestible urban space and infrastructure
21.	**<u>Brings infrastructure, new services, facilities and tax revenue to remote, poor or blighted areas</u>** -Potential economic development tool -Gentrification and Urban Renewal -Social seams
22.	**<u>Expression of right of collective privacy on the part of residential groups</u>** -Club goods

17. Gated Communities offer more Regulation

As Fischel (2003) has noted, people want more land regulation, not less. Nelson (2005, 2003) and Fischel (2003) among others have observed that one of the major advantages to gated communities is that they offer the opportunity for private zoning that is not under the scrutiny of the public. Indeed, the benefit of private zoning is not just limited to regulating what is behind that gate but the Homeowners Association structure allows the gated community to enforce existing municipal zoning outside the gates because of the sheer demographic weight that gated community command (Fischel 2003; Webster 2002). Steele(1986) in assessing the functions of zoning found that the community's opinion (whether positive or negative) swayed decisions depending the level of community participation.

Many have noted the similarities between gated communities and private clubs which have always had the power to demand more regulation upon its members (McKenzie 2006, 2005, 2003; Webster 2005, 2002; Nelson 1989; Glasze 2003; Giroir 2003; Manzi 2005).

In an era where the fear of crime or the perception of the fear of crime[25] has elicited a demand for more protection, residents have clamored for more police protection. Yet, municipalities are unable to meet this demand because of shrinking budgets and a corresponding citizen dislike for increased taxation. Municipalities have responded by allowing, encouraging or even requiring gates, security systems and even security guards for new residential development which has to some degree satisfied demand for more police protection (Lang and Lefurgy 2007; Davis 1998; Hunter 1985; Falzon 2004:153; Newburn 2001).

18. Promotes civic mindedness

Because gated communities require homeowner input into the governance of their community, in an idealistic sense, it would be expected that this public behavior would extend

[25] Chapter 2 provides a more complete discussion of this issue.

beyond the confines of the gated communities. A more cynical view is that because residents are not only taxed by the municipality but also in the form of condominium association dues, that homeowners are self interested in legislation that affects taxation. Furthermore, because CIDs in larger states are subject different regulations than fee simple homeowners, residents should have a more of a stake in legislation that effects them.

I have seen anecdotal newspaper accounts calling for the end to "double taxation," one study at least has systematically looked at the public participation of gated community residents. Gordon's (2004) study of gated community voters in Southern California finds that these citizens vote more often and that these communities have more registered voters than their non-gated counterparts. Kohn (2004) relates a case study of a condominium in New Jersey where residents actively campaigned on the part of candidates the condominium association endorsed.

19. Innovative, flexible, efficient and more powerful municipal government

One of the oft cited reasons for municipal fragmentation is that residents are in more control of smaller jurisdictions (Fischel 2001). Fischel (2001a, 2001b, 2003, 2004) in several publications about his "Homevoter Hypothesis" notes that municipal fragmentation may not be enough land use control for homeowners since these citizens want more regulations not less. Another reason that gated communities are appealing is that they offer residents even more control than a public jurisdiction.

Robert Nelson (2003, 2005) argues that because of the private governance structure gated communities are a new and better form of government that is more flexible and efficient than public government. This is partly because it mimics municipal government but does not operate exactly the same way. These private governments allow the finer degree of land use control craved by residents by allowing for wider latitude in regulation. He and others have also noted that CID's also are a cure to the Tragedy of the Commons (Hardin 1968) problem in municipal government by reducing

free riders (Glasze 2003, 2005; Chen and Webster 2005; Foldvary 1994).[26] In fact, because of the ability of gated communities to be used as a gentrification or economic development tool, it can be argued that under specific circumstances gated communities can actually create positive spillover in urban areas by reestablishing public goods such as safe children's play area (Manzi and Smith-Bowers 2004). Manzi and Smith Bowers (2004) also suggest that in specific locations gated communities can provide positive externalities, or at least neutral to the municipal operating budget.

CIDs also have more powers than municipal government; some that may be positive for residents that would not be tolerated in public governments because of civil rights violations. Some of these powers are discrimination, admitting people for money, limiting the number of residents. This also includes opportunities for corruption such as self dealing, selective enforcement of government documents because there are no checks and balances or due process necessary. (Lewin 2001; Nelson 2003, 2005; Chen and Webster 2005).

CIDS also have some unusual powers such as being able to enter into commercial activity and debt collection powers, making commitments for life of community, hire and fire like corporation, and terminate themselves and sell the neighborhood (Lewin 2001; Nelson 2003, 2005). Lewin (2001) also notes that there are opportunities for self dealing partly because there are no checks and balances or due process required other than those rights spelled out in the CC&Rs. He also notes, that the lack of built in oversight, in addition to reported resident apathy, allows for a selective enforcement of communities documents.

Gated communities and their private governance structure are flexible enough to accommodate many different sizes of private cities from for example, 200 to a private city in China that contains 200,000 residents (Webster and LeGoix 2005). This flexibility also becomes an economic efficiently because it provides collectively consumed goods to be provided by market by

[26] Yet, Nelson does not directly address the how separating these facilities from the larger municipality solves the free rider problem.

privatizing civic services (Gooblar 2002; Foldvary 1994; Webster 2002; Chen and Webster 2005; Glasze 2005; Roitman 2005). And as noted as an economic efficiency, enclosing neighborhoods are also politically efficient means of conserving at-risk, congested and depleted resources and reduces freerider problem inherent in the distribution of public goods. (Webster and LeGoix 2005; Chen and Webster 2005; Foldvary 1994; Glasze 2005).

Municipalities also find positive functions to gated communities because they shift the high cost of new development directly onto residents. In return, residents get community maintenance at higher level than a municipality could normally provide such as extra policing.[27] Residents outside the gated community, theoretically enjoy less taxation and other municipal costs (LeGoix 2006). The other benefit to municipalities is that the lower costs associated with using private governance structures allows municipalities to seek growth and more taxes with less expenditure (McMahon 1999; McKenzie 2005). In some Phoenix area jurisdictions, this allows some towns not only to seek more growth but the ability to shrink government by having only a part-time mayor (Lang and LeFurgy 2007; see also LeGoix 2006 for examples in Southern California). Some have also suggested that because gated communities are self-policing that this gives the public police more capacity (Webster 2006).

Municipalities also do not have to worry that they will fade away despite the popularity of private governance. Webster and LeGoix (2005) see that there will always be a need for public government structure even in the dominance of private government. This is because there are many powers that private governments do not want to take on such as a penal system. In their terminology, gated communities get to "cherry pick" their liabilities. LeGoix (2006) suggests that "cherrypicking" makes gated communities "predators of public resources" because they do not take

[27] Indeed some residents can also get their enhanced services and a rebate to boot. According to Steven Siegal (1998) Houston, Kansas City, Montgomery County Maryland and selected New Jersey municipalities have begun to refund property taxes to gated communities that provide municipal services such as trash removal and snowplowing.

on the heavy lifting of public service provision that public government bears. He sees this as particularly detrimental when gated communities (as in a large master planned community) receive public infrastructural resources from a municipality and then turn around and secede from that same jurisdiction. However, what would be termed dysfunctional by the municipality is certainly positively functional to the gated community residents. Internationally, private governance appears to be better for residents in areas with weak town planning and government because these private governments applies rules and regulations in a much more evenhanded way that the local jurisdictions (Thuillier 2005).

Since the 1980s, there has been a widespread notion that decentralized, local government as epitomized by gated communities, meets residents needs better than centralized government (Webster 2006). As Kohn (2004:118) puts it: "Given that local government often seems remote and rigid, disaggregating decision to the neighborhood level is one way to deepen democracy." Thus, as a positive function, residents, whether they take advantage of it or not, do have the convenience of this decentralized political structure at their disposal.

Gated communities also provide a level of safety (whether real or perceived) that public government cannot provide (Luymes 1997; Atkinson and Flint 2003). Since government cannot meet the public's demand for more security, Lee argues that gated communities are part of a larger national governance strategy (spreading among industrialized nations) that encourages individuals to regulate their own risks (Lee 2004:35). Thus, because residents are responsible for their own safety, gated communities, according to Atkinson and Flint (2003) have the potential to produce a freedom from the fear of crime that seems to permeate modern society Others note that the gate purpose is mainly to protect the cars parked there (Blandy and Lister 2005). Gated communities also meet other public safety demands such as reduced traffic and increased safety for children

(Blakely and Snyder 1997; McKenzie, 1994; Manzi and Smith-Bowers 2005; Harris and Evans 1999).

20. Supports many Urban Planning Values

Among urban planners, gates engender mixed reactions based on the perceived harm they might cause a community. Ironically, though, gated communities do support many model urban planning practices and policies. As Grant (2004) notes, many gated communities because they have many shared facilities actually are developed at higher densities and are a more compact form of development than most greenfield development (see also McKenzie 2005 and Boddy 1995). Most comprehensive plans also allude to the idea their community should be "safe, quiet and private" and provide "quality design." (Grant 2004). Grant also points out that the layouts of many gated communities are pedestrian friendly and are built with traffic calming features. Another ironic twist is that gated communities are designed to create a sense of place and community (Grant 2004).

In many ways, gated communities support sustainable community practices. First and foremost is the need for fewer individual resources because community amenities such as pools and golf courses are shared among a good number of residents (Grant 2004; McKenzie 2005). Similarly, gated communities conserve urban space and infrastructure and, as many master planned communities are required to, dedicate a substantial among of open space within the development. (Webster and Le Goix 2004). The access to this type of open space is just as important in other countries such as in Brazil. de Moura finds that the openness of space within the enclosure to be more important than the actual closing off of the neighborhood (de Moura 2003). Part of the reason for this, suggests Charmes (2003:3), that people are buying the environment around the house as much as the building itself.

The design of gated communities also supports urban planning supported CPTED practices advocated by Jane Jacobs and Oscar Newman that encourage residents to increase surveillance in

their community. It can be argued that gated communities serve as a collective cul-de-sac or an extension of the old style cul-de-sac as one observer suggests (Boddy 1995).

21. Brings infrastructure, new services, facilities and tax revenue to remote, poor or blighted areas

Somewhat related to the planning values function, gated communities have been found to be an important economic development tool. Webster and LeGoix (2004) note that gated communities can serve as a potential economic development tool particularly in areas ripe for gentrification and urban renewal. In areas that are in transition, they argue, gated communities and the security they offer, may be just the incentive to seed further gentrification (See also Atkinson 2006, Manzi and Smith Bowers 2003 and Chao, Oc and Heath 2003). For instance, Manzi and Smith Bowers (2003) detail an example of a gated community being used to bring higher income residents to create a mixed-tenure development. This type of planning tool is similar to the "social seam" concept developed by Jane Jacobs (1961), where the infusion of higher incomes can inoculate the neighborhood against the ups and downs associated with business cycles (See also Nyden, Maly and Lukehart 1997).

This same expression of this tool can be seen from another angle. Caldeira (2000) notes that gated communities in Brazil, while not conscience policy, have been found to boost local amenities in poorer rural areas. She cites examples gated communities being built in existing rural neighborhoods. She remarks that the existing residents were unable to successfully secure public services in their remote area. With the completion of the new gated community in the area, existing residents benefitted from the social and political clout of the higher income gated community residents and their ability to steer services to this area (see also Glasze 2005).

22. Expression of right of collective privacy on the part of residential groups

Recent research on gated communities has made comparisons between them and private clubs. In this perspective, gated communities function much as a country club. Club economies (as they are sometimes referred to) provide members many public-style goods that a municipality would such as golf courses and swimming pools but only to members. These scholars contend that it might be a better idea to portray gated communities in this fashion rather than referring to them as private governments. Repositioning the idea of a gated community as more of a country club would certainly stir up less negative public sentiment if they were defined in this manner (Giroir 2003; Glasze 2003; Manzi Smith-Bowers 2005; Webster, Wu and Yanjing 2005; Webster 2002).

Conclusion

Despite the fact that this chapter has identified positive functions of gated communities, the majority of the literature is unsympathetic to the continued spread of this community form. But why? Most analysts strongly argue that gated communities are detrimental to community. Yet, by looking at this same literature in a different light, the arguments here suggest otherwise. Based on these findings I would recommend that future gated community research should strongly consider not only the negative aspects to gated communities but at least take stock of why they are so popular from the producers' and consumers' points of view in a more direct manner.

The next chapter takes this idea a little further by doing something similar from the point of view of community theorists. Here I will debate whether gated communities represent a loss to community on terms of diminishing social ties (cohesion) or do they promote community cohesion (albeit not in the traditional sense), or are gated communities a transition to a newer modern form of "traditional" community.

Chapter 5
Gated Communities and the Community Question: Community Lost or Gained?

As Jill Grant (2004) observes, planners express a strong ambivalence towards gated communities in part because they embody many positive planning elements but at some cost to the community at large. But some have suggested that the tendency of humans to be ambivalent is a healthy and natural part of the human condition. Neil Smelser (1998), for example, suggests that there is a social dimension to the emotion "ambivalence." According to Smelser, *ambivalence*, rather than *certainty* is the way that most individuals experience social life and "because ambivalence is such a *powerful, persistent, unresolvable, volatile, generalizable,* and *anxiety-provoking* feature of the human condition, people defend against experiencing it in many ways" (Smelser 1998:6 emphasis in original). [28] Furthermore, by institutionalizing what appears to a democratic process in the form of a gated community's private governance, governments (particularly local governments) can forestall the exit of wealthier residents. And, although he is talking about the relation between a nation-state and its citizens, Smelser's argument[29] about the ambivalence of freedom and intrusions on liberty can just as easily be applied to lower governmental jurisdictions:

> Liberty can be regarded as a principle of limited exit within a context of loyalty-a way of minimizing governmental involvement in the lives of citizens. This principle, however, stands in permanent tension with the political imperatives of the sovereign nation, which are to discourage exit and to demand loyalty, both of which impinge on liberty, absolutely defined. By institutionalizing a democratic principle- or fiction, if one prefers-that the rulers are ruled by the people they rule, limited intrusions on liberty are defended as legitimate, particularly if rulers are policed by a quasi-independent agency, the courts. (Smelser 1998:13).

[28] Smelser defines ambivalence as a social state where individuals have "opposing affective orientations towards the same person, object or symbol" (Smelser 1998:5).

[29] Some of these ideas are extensions of Hirschman 's (1970) notion in his book *Exit, Voice, and Loyalty: Responses to Decline in Firms, Organizations, and States.* These concepts will be discussed in more detail below.

In this same vein, I bring much ambivalence in discussing whether gated communities represent "community lost or saved or transformed," the basis of what is now termed the *Community Question* (Wellman and Leighton 1979; Wellman 1979; Connerly 1985; Suttles 1972). Wellman and Leighton (1979) in a seminal article on the subject place the major sociological theoretical perspectives on community into the three broad categories of community lost, gained or liberated (sometimes referred to as transformed) (Lupi and Musterd 2006). I first briefly discuss the components of the Community Question and then apply it to the characteristics of gated communities.

The Grand Theoretical Traditions in Community Studies: Community Lost, Gained and Transformed

The *Community Lost* perspectives conclude that modern life has weakened primary relationships increasing compelling individuals to rely on formal organizations for every necessity. These perspectives arose with the transition stemming from the Industrial Revolution. The dominant theorists that fall into this camp are Tonnies, Durkheim, Simmel and much influenced much of the thinking of the Chicago School of sociology at the turn of the 20th century. These thinkers were concerned with the weakening of primary relationships in modern urban life and the shift towards more impersonal interactions and alienated communities.

What is particularly relevant for the purpose of the analysis is that these "lost" scholars characterize "…modern urbanites as alienated isolates who bear the brunt of transformed society on their own" according to Wellman and Leighton's interpretation (Wellman and Leighton 1979:369). Lee (2004, 1999), as discussed elsewhere, has continued this thinking with his discussion of how many modern governments have shifted the responsibility of crime and governance onto their citizens.

Community Saved, a more recent set of ideas, contends that communities, particularly neighborhoods, have persisted despite the widespread development of large bureaucratic institutions. Indeed, these arguments insist that urbanites have more localized relationships and create relationships and organizations among family, work and neighborhoods in order to mediate and cope with large bureaucratic institutions (Wellman and Leighton, 1979). . The most well known proponents of this approach include Herbert Gans and Daniel Bell. Other thinkers on community have combined the best of the "saved" and lost" arguments and propose that modern society still retains its community despite the impersonal level of society. However, the community *transformed* or *liberated* approach suggests that there is a moral order in the "collective organization of individuality" in that it is inherently more flexible and the mobility necessary to negotiate modern life (Lupi and Musterd 2006).

Gated Communities and Community Lost

Gated communities as has been suggested are an outgrowth of the natural tendency of humans to create boundaries. But there are boundaries that are necessary create the sense of belonging and those that are detrimental to society at large, some created by agreement, others the outcome of conflict. Merry (1993:74) notes that many community theorists such as Durkheim, Wirth or Gans (1962) see the idea of community as the relationship between formal and informal social control. To the degree that Americans continue to manage conflict by the use of "moral minimalism" (otherwise known as avoidance) and increasing social distance, the community lost of theorists would see gated communities as a further erosion of community (Baumgartner 1988).

Gated Communities and Community Saved

Conflict Management as a Community Saved?[30]

One of the more "convenient" amenities offered by gated communities is the avoidance of conflict. Many urban legends abound about the ability of gated community residents to anonymously resolve conflict through the homeowner's association structure. Coser (1964) suggests that conflict is positive and is a group building or perhaps even a community building tool. However, before deliberating on gated communities, I will first look at NIMBYism as a predecessor to gated communities, at least in terms of conflict and conflict management.

At its most fundamental level, NIMBY refers to neighborhood opposition to any land use placed in or in the surrounding area. Dear (1992) defines it as "protectionist attitudes of and oppositional tactics adopted by community groups facing unwelcome development in their neighborhood." Community resistance is strongest at the beginning of process where residents mobilize to block development soon after the public announcement is made (Piat 2000; Dear 1992; Lake 1991).

The traditional explanation for NIMBY assumes homeowners' fears that their property value will decline if the proposed project is built. Newspaper accounts characterize NIMBY attitudes as selfish, greedy neighbors. Recent literature suggests, however, NIMBY attitudes are much more complicated than the stereotypical characterizations. Pendall (1999), for instance, demonstrates that there is often more than one reason why neighbors will resist development, most community residents in his study expressed resistance over environmental issues. Low income housing generated a controversy in only one out of 182 projects.

[30] This section refers primarily to homeowned gated communities but much of this is applicable to rental gated communities. Despite tenure differences, rental gated communities have similar effects on their surroundings and may be subject to many of the same conflicts because these complexes are embedded in larger master planned communities and subject to homeowner association CC&Rs. Also, since RGCs have the potential to turn condo, all these positive functions would eventually apply to these properties.

Fischel (2001a), who tries to answer the question "Why are there NIMBYs?," suggests that NIMBYs are not selfish and greedy homeowners but are investors acting rationally. According to Fischel's (2001a and b*) "*homevoter hypothesis," homeowners are behaving "rationally" to protect their uninsured home equity by carefully screening those land uses that could reduce their property values. In the past, property values were protected by zoning, in particular, exclusionary zoning.

Fischel was inspired by Tiebout (1956) who noted that voters choose the community that provides the best public goods that meets their needs, in a principal that has come to be referred to as "residents voting with their feet." Preferences would be met in an environment where there are larger numbers of local governments because each town would provide a different set of public goods that comes close to meeting the voter's needs. Fischel finds that fragmented governments located particularly in the Eastern United States were and still are the prime places where the homevoter system of property protection can be maintained.

In areas with less government fragmentation, a newer strategy has emerged to "rationally" protect homeowner property values. Fragmentation has turned private with the creation of homeowner associations, found in large master-planned communities and condominiums compel a predictable and rational set of behaviors and obligations on all residents by contractual agreements known as CC&Rs (conditions, covenants and restrictions). Rather than relying on publicly regulated zoning and land use law to protect property values, these private contractual agreements reduce the risk of neighborhood disorder and decline (Blakely and Snyder 1999; McKenzie 1996; Lang and Danielsen 1997). Some of these developments include low income housing that would often be refused in other more traditional town frameworks but the CC&Rs give homeowners the power to enforce standards of property maintenance and social behavior upon their neighbors that traditional fee simple neighborhoods cannot.

The economic evidence is clear that purposely preserving desired land uses and excluding unwanted land uses such as affordable housing and the poor increases property values. For examples restricting age (Allen 1997; Gunterman and Moon 2002; Quang and Grudnitski 1997), increasing apartment security (Hardin and Cheng 2004), installing walls and gates (Bible and Hseih 2001; LaCour-Little and Malpezzi 2001); and preserving historic districts (Gale 2002) all increase rents and property value. Ironically, crime has little impact on house prices overall particularly in low crime areas but house prices in high crime areas are discounted (Lynch and Rasmussen 2001). Lynch and Rasmussen also discovered that gated communities are valued higher in lower crime areas than in higher crime areas and speculate that the premium for gated communities in low crime areas is attached to status and perceived marginal safety.

Homeowner associations are the next generation NIMBY's coalitions. Because of the velocity of NIMBY fights to preserve property values, these conflicts sparked the innovation of and increased the number of homeowners associations within gated communities to more formally regulate conflict regulation. Homeowner associations, because of the social regulation in the CC&Rs, should retard NIMBY activities associated with preserving property values. In addition, CC&R's detail appropriate and therefore predictable behavior that preserves the social order, spells out specific grievances that may be remedied and the means available to resolve through such third party vehicles as mediation or through the court system. Because these restrictions limit the type and the number of grievances allowed, conflict remains at its low intensity. Thus, gated communities theoretically should more effectively reduce conflict at least within the confines of the enclave. In addition, gates, walls, and the homeowner association structure serve as a safety valve that releases tensions and eases anxieties about increasing diversity, density, and incompatible land uses.

Because all homeowners in a gated community agree to these conditions for the preservation of property value, this produces an enormous amount of solidarity among the residents. In fact, many localities lament that gated communities have stepped up the NIMBY process for development outside the walls because they form such a solid and large coalition.

Privatopia?

These positive functions of conflict form the basis of what McKenzie terms Common Interest Developments or CIDs. Although common interest developments do effectively manage conflict, at least on paper, they do so in a manner more restrictive and sometimes more punitively than the local municipalities. And while types and numbers of conflicts may be restricted, many times the conflicts that do get aired may end up being more hostile than a NIMBY type of fight. What appears like solidarity on the surface may actually reflect a contractual suppression or squelching of civil and private property rights enjoyed by those with fee simple land.

McKenzie reveals that one of the original function of homeowner associations was to enforce exclusionary race-restrictive covenants. After this was deemed unconstitutional, developers retooled the language in covenants to ostensibly preserve property values although in practice this new spin still has the same effect of maintaining segregation and exclusion. The end result is that property values are maintained through providing an insurance policy that traditional suburbs cannot provide. Homeowners, while beholden to these "servitude regimes" that limit their rights, buy the confidence that the neighborhood will not decline, will suffer no disorder and that the threat of crime will be diminished. Property owners continue to reproduce this expectation through the continued demand and price premium on gated developments (Knox 2005).

Mitigating NIMBYs through Increasing Social Distance

Much to everyone's surprise, Sanchez, Lang, and Dhavale (2005) found that gated communities are found not only among homeowners but renters. In fact, their study revealed that

renters are 2.5 times more likely to live in a gated community and that the majority of these renters are low income minorities, particularly Latino. The question that they could not answer was why this was so or why this escaped the notice of gated community scholars.

Blakely and Snyder (1997) are among the few scholars of gated communities that observe that gated communities are found in a wide range of income groups although they did not make differentiations by tenure. They argue that the lower the income, the more the gates actually serve to increase safety. This may be true to a large extent but does not actually take into account other related reasons.

Walls and fences have been observed to be a NIMBY mitigation strategy. For example, if fee simple homeowners are confronted with a plan to build an apartment building (a typical NIMBY) that encourages their creation of a temporary association for the purpose of defeating the plan. After much negotiation with the developer the residents agree to the development as long as a gate and wall are installed. The gates around a low income apartment community serve almost as a metaphor of respectability that are imposed upon developers of these places by middle class neighbors whose social construction of community requires an emphasis of predictability and social control, which the gates signify. In South Africa gating is national policy to reduce NIMBY opposition to placing lower income housing developments near middle and upper class (read white) neighborhoods (Lemanski 2006).

Gates have been characterized as having the double function of excluding oneself from society while diminishing access and choice of those not included (Aalbers 2003). The use of gates as a NIMBY mitigation strategy may in fact, serve to exclude the excluded from the included as long as the gates/walls separates the land uses. In more common and wealthier gated communities, gates keep residents distant and free from intruders by increasing social distance.

Social distance (Simmel, Park, Bogardus 1925, 1959) is composed of two dimensions, vertical and horizontal distance. Vertical social distance refers to someone's place on a hierarchy and horizontal social distance describes degrees of intimacy and familiarity. Although a gated community resident may be physically close to those outside the gate demonstrating close horizontal social distance but at the same time the exclusionary dimension of the gate serves as a visible representation of the resulting immense vertical social distance between them. In the case of rental gated communities, exclusion in some ways is in the eye of the beholder (although power still rests with the property owners): homeowners exclude apartment dwellers inclusion in their neighborhood while renters exclude homeowners from the various amenities offered by gated communities. But the fundamental function of the gate in this instance is to increase the social distance, and thus full integration, into the neighborhood.

Mitigating land uses through the use of gates for apartments or less desired land uses such as supportive housing or public housing represents a counterintuitive dimension to gating.[31] In these cases, the disamenities associated with the undesirable land uses are still controlled by the elite through containing or hiding them behind walls. Yet this behavior is totally rational when looked at through Fischel's Homevoter Hypothesis, Coser's functions of conflict (see below), and Bogardus's idea of social distance. By enclosing the undesirable land use, property values are preserved, conflict is avoided or kept to a minimum and seemingly large distances (social) between uses are maintained.

The Functions of Conflict

Coser (1964) posits several functions of conflict in society between and within groups as displayed in Table 5-1. There are several outcomes arising from the lower the intensity and violence of conflicts. Lower intensity conflicts are likely to release hostilities before sides harden, that is they

[31] See Applied Real Estate Analysis (AREA), Inc. (1995) for an example of gates used as part of a NIMBY mitigation negotiation for supportive housing in North Carolina.

serve as a safety valve (connection) within groups and form the basis of negotiation that promote more formal regulation of conflict relations. These conflicts create a group identity that is based on common interests (definition and revitalization). Conflicts increase awareness of realistic issues facing the group in terms of understanding what is worth fighting for and who should be included in the group (Reconnaissance). Successful tactics are replicated and emulated by other groups thereby increase the number of associations (Replication). Conflicts can also increase the level of innovation through creating new institutions and during negotiation process. Finally, the more conflict promotes these outcomes, the greater the group solidarity and the greater capacity to adjust to a changing environment.

Table 5-1 The Functions of Conflict
Based on Coser (1956) *The Functions of Conflict*

Function	Among Groups	Within Groups
1. Connection	Asserts relationship to other groups (negotiation)	Maintains relations by releasing tension (safety valve)
2. Definition	Sharpens exterior boundaries (Them)	Sharpens internal boundaries (Us)
3. Revitalization	Revitalizes mores and traditions	Strengthens underlying values of membership (commitment)
4. Reconnaissance	Gets information for peacemaking or war (Is it worth the fight?)	Gets information for cooptation or persecution of deviants
5. Replication	Given a balance of power, generates a similarity of structure (emulation)	Given a balance of power, generates a similarity of behavior (conformity)

Source: Rozycki, and Clabaugh 1999

As society becomes more differentiated and interdependent or modern, we witness more low intensity conflicts like NIMBY. NIMBYism embodies much of the positive aspects of the effect conflicts has on communities. Because the many associations created by NIMBY's do not last very long, sides do not often harden because the conflict generated by them is of this low intensity type.

Gated Communities and Community Transformed

Despite his early entry into this "debate," Emile Durkheim (1964) would see the development of gated communities in a more positive light. Durkheim viewed the modern form of order superior because it was based on objective and less subjective basis of order as characterized by less modern communities. According to Durkheim, order in urban or modern environments relies on more formal methods of social control such as contracts and law that impose obligations on individuals based on mutual self interest or reciprocity of obligations. Order is enforced by large formal impersonal institutions (a specialized function in society in and of itself) that create just laws and rules used in constructing contractual obligations. In fact, the "culture of avoidance" that Baumgartner (1988) observes would be an appropriate expression of Durkheim's thinking. Furthermore when people deviate from societal norms this presents an opportunity to either create harsher punishments or to respond in some different fashion. Less modernized societies tend to retaliate while modern societies rely more on restitutive law based on contracts, third parties, and courts to restore damaged interests. To Durkheim, gated communities would be continued evolution of how social order is maintained in modern life because he believed that complex societies need more organization not less (Garland 2001:101).

Fischel (2003) comes to a similar conclusion but arrives there through an extension of Tiebout's (1956) theory of homeowner's economically driven motivations to maintain order. In economic terms, if order is able to be purchased through the services offered by any municipality, home value will be maintained and will, mostly likely, increase. If order (or other high levels of municipal services) is lost, Tiebout (1956) suggests that homeowners will "vote with their feet" and move to another town that meets their needs for these services. Municipalities, at least since the early 20th century, have relied on zoning to achieve the order craved by homeowners protecting their largest investment. Fischel (2003) argues that zoning was apparently not enough for

homeowner's who actually want more restrictions on land use. Fischel explains that the basis for more control was met by homeowner's associations initially created for high density condominiums. The same regulatory structure then evolved to larger master planned communities, some that were gated.

The community question has been a fairly dormant debate for some 20 years. However, a recent article, Lupi and Musterd (2006) wrestle with the community question as it applies to the suburbs and argue that the suburbs from day one were community transformed because the suburban environment appeared after the industrial revolution was fairly well established. The suburban lifestyle, they argue, values privacy, order and well maintained neighborhoods. Yet, they argue that because the suburbs have evolved to have more diversity, the popular perception is that the suburbs represent the community lost perspective. These collective values of privacy do, at some level, create a "functional" community spirit in the sense that all neighbors have a mutual stake in preserving their individual economic assets. But at the same time, these same values, because they are financially based, produce an atmosphere of distrust and fragmentation leading to the growth of gated communities (Lupi and Musterd 2006:807).

Community Gained or Lost?: Does Predictability equal Cohesion?

The foregoing discussion applies theories of community to the characteristics of gated communities. But I return here to the question as to whether gated communities represent community lost as most researchers conclude or community gained. On face value, the answer is *community gained* because of the stability inherent in social hierarchy and segregation. As Brint (2001:6) concludes, early community studies such as Lynd and Lynd's (1929 and 1937) Middletown studies "emphasized the structure of privilege as the hidden truth underlying nominally cohesive communities." Brint goes on to note that there is usually a purpose behind the rise of

community stratification, one being a means of social control particularly in communities that require a great deal of face-to-face contact. Conversely, those communities that do not have a geographic dimension are often more egalitarian (eg. internet communities). Thus, site-based community structures (both physical and social) that prop up and reproduce social hierarchy such as gated communities or segregation are the glue that keeps communities predictably cohesive (Brint 2001:15-16).

It highly likely that the social ambivalence that pervades modern life will fuel new debates over whether gated communities are even predictable enough to allay the fears of homeowners. Thus, we can expect more policy exchanges over whether gated communities help or hinder the surrounding neighborhood and municipality despite the certainty inherent in these stratified structures. The ambivalence does not just extend to a larger discussion of community gained or lost but also to the fundamental tendency of humans to create boundaries in the first place.

However, based on the various perspectives discussed here, the best conclusion one can arrive on is that at best, gated communities are a transitional community form as suggested by Fischel (2003). Despite the enthusiasm espoused by Robert Nelson (2003 and 2005) who champions private governance as a new form of democracy, I see this as a step on the way to a different local governance form. I arrive at this conclusion based on Hirschman's concepts of *Exit, Voice* and *Loyalty*. These concepts will be defined here briefly before continuing with the idea of the transitional nature of the current state of private governance.

An individual's reactions to the negative side of their ambivalence towards government can be what Hirschman refers to as *Exit.* In order alleviate the ambivalence, this requires the individual leaving the municipality, state or even the country depending on the person's tolerance level. The other option is to suppress dislike for the government through *Loyalty* where the individual stays put and focuses on the positive aspects rather than dwelling on the negative.

The middle ground is *Voice* where the individual is not happy with the way things are but does not want to give up on the situation. *Voice* entails all efforts to change or fix the unacceptable conditions (Hirschman 1970:30; Smelser 1998:12). *Voice*, which is another way of saying political participation, is practiced in various forms of democratic institutions and becomes important when *Exit* is not an option or too expensive. Hirschman suggests that these same principles apply in every basic form of social organization including family, government or religion (Hirchman 1970:33; Smelser 1998:12).

Hirschman (1980) contends that ambiguity and uncertainty play a big part in how public goods and policies are created. Unless costs are well-defined for a common public good such as police, any efforts or participation to create new public goods or change old policies will be avoided by the individual because participation itself is seen as a cost. Yet, according to Hirschman (1980)

> Uncertainty is an important element in this strange transformation of means into ends, and of costs into benefits. Success in the advocacy of a public policy is always uncertain: nobody knows the size of citizens' advocacy or protest that is needed to impose, change, or stop a given public policy. If a citizen feels strongly, he may therefore experience the need to negate the uncertainty about the desired outcome by the certainty of participation in the movement to bring about that outcome. In a more rational vein, uncertainty may act at times as a discriminating monopolist as it extracts from each person with a "taste" for a certain policy the *full* amount he would be willing to pay to have that policy; this would happen if each individual becomes convinced that his contribution makes the difference between success and failure of the movement (1980:433-434).

He continues that there is a second condition that is necessary to encourage individuals to pay for the cost of participation. Uncertainty must be paired with *ignorance* in the sense that participants do not know how to set up the public good (as in a product produced by the government such as infrastructure) or much about the problem and/or the need underlying the creation the good or service or what would be considered an appropriate response the problem. This situation presents itself when there is strong public demand to solve a “poorly understood” problem quickly.

I demonstrate earlier that the rise of gated communities and private governance is seen as a response to the fear of crime and/or a stop-gap measure to deal with increasing diversity in metropolitan areas. And, as Hunter observed in 1985, around the time gated communities began their ascendency, citizens in many jurisdictions demanded more police protection that could not be met by shrinking municipal budgets (Hunter 1985; see also Garland 2001:93). Thus, in an effort to "do something," as Hirschman (1980) refers to the knee-jerk manner that "ignorance and uncertainty" gets resolved, municipalities allowed gated communities and required a contractual condominium-style governance as a way to solve the dilemma (Fischel 2003).

Hirschman's concepts of *ignorance* and *uncertainty* are also useful to explain the recent backlash against gated communities in some communities both in the United States and internationally.[32] Hirschman argues the quick-fix solution enacted under pressure from *ignorance* and *uncertainty* about a problem casts doubts about the goods and services created after a period of experience with the public products. Indeed, he suggests that the revisiting of the issue may arise after a long period of widespread and undisputed acceptance. He notes that the more complicated and tenuous an issue, the more likely the public products produced will be prone to these "cycles of acceptance and questioning." McKenzie (2006) chronicles such reform legislation trends in California, Florida and Arizona, a process that has been going on for more than a decade. These reforms are aimed at making the gated community governance structure more transparent and democratic with varying degrees of success.

Yet despite the small but growing discontent with gated communities in the United States, Cséfalay (2007:4) asserts that the growth of gated communities are part of a larger "reshuffling of the level of governance" where the nation-state is losing importance and supranational and

[32] Ashville, North Carolina is the most recent municipality to ban gated communities (Summer 2007). This is not the only community to do so and many communities have place moratoriums on either temporary or permanent in response to citizen complaints.

subnational governance structures are gaining strength. The reshuffling of governance, according to one observer, can be traced to the 1960s when a broader movement towards democratization, or "desubordination" eliminated more traditional stratification systems (Miliband 1978). Desubordination, as Miliband defines it, fundamentally reflects a waning deference towards social elites but also manifests itself as a growing disrespect for the authority of government officials and agencies and even the right to govern. The outcome was a shift in governance styles that changed from "governance by command" to "governance by negotiation" where citizens are more like customers than subordinates and "top-down decision making" became a thing of the past (Garland 2001).

With the demise of the predictable, regulated hierarchical structure, a landscape of perhaps too much freedom creates an atmosphere of insecurity that Garland (2001) suggests produced a "renewed interest" in social control particularly in the 1980s and 1990s. This resulting pluralistic political is context that gated communities would find eager consumers, who were uncomfortable with the risk brought by this level of deregulation.

As countries see the shortcomings of the first wave of deregulation and the inherent problems with gated communities, a more refined version of "pluralism" is evolving and in some unexpected places. What is broadly termed "structured self-organization," is a process where public goods arise from citizens with various degrees of oversight from the government or some governing agency or body. The process is flexible enough to apply at a small scale as in voluntary environmental protection agreements or at a higher jurisdictional level such as a municipality. The model that is often cited for the municipal level is Curitiba Brazil, where it is sometimes termed "Open Source Government" (Leadbeater 2007?).

Chapter 6
The Persistence of Segregation in Gated Communities: Measuring Diversity in Rental Gated Communities

Introduction

Gated communities have become synonymous with segregation in the public mind and in the research literature, particularly for those homeowner communities. Since there has not been much focus on the rental version of these communities, I was optimistic that I would find some integration occurring in the neighborhoods where these communities are found. Also, based on Ellen's (2000) profile of renters (see Chapter 2 for a longer discussion), it seemed likely that RGCs might be more likely to tolerate diversity. If this was true, this would go a long way towards improving the public image of gated communities in general.

However, the more important policy consideration if RGCs improve the lives and opportunities of those who live in these type of neighborhoods. As John Logan put it, "the housing market and discrimination sort people into different neighborhoods, which in turn shape residents' lives—and deaths. Bluntly put, some neighborhoods are likely to kill you" (Logan 2003:33).

In this chapter, I explore the extent to which RGCs present more of the same tendencies that their homeowned counterparts. I do this through an empirical analysis of whether gated communities are more likely to be present in segregated neighborhoods or if they are a sign of integration. But first I provide a brief background to measuring segregation.

Introduction to Segregation Indices

Measuring residential segregation traditionally has sought to understand the distribution of various groups within a given area (Iceland, Weinberg and Steinmetz, 2002). Over the long history of segregation measures studies, five dimension of segregation (of which there are as many as 20

different equations) have been developed. To simply the ideas behind the dimensions even further, four of the five dimensions can have been portrayed as opposites. Concentration, or the physical space occupied by the group is the opposite of Evenness, the differential distribution of populations. Clustering, the degree of minority concentration can be thought of as the reverse dimension of Exposure that measures the potential for contact between groups. The last dimension, Centralization, measures how close a group is to a central city, which some have argued has little meaning in the current complicated urban landscape (Iceland Weinberg and Steinmetz 2002; Brown and Chung, 2006).

While all of these measures contribute different perspectives on residential segregation, I will focus here only on the dissimilarity index (a measure of evenness/concentration) as background for discussing another measure of evenness, Simpson's D which is more applicable to neighborhood level studies. The dissimilarity index is the most well known and most commonly used measure. This index determines the percent of a group's population that would have to move for each neighborhood to have a similar percent of that group as the larger area as a whole. The index ranges form 0 to 1 with zero meaning complete integration and one indicating complete segregation (Iceland, Weinberg, Steinmetz 2002).

Part of the justification for this study arose from studies finding that Southwest has among the lowest levels of dissimilarity in the country (See for example Frey 1996, 2003) including an ambitious project by the Lewis Mumford Center. [33] Researchers at the Mumford Center have calculated several different types of segregation indexes for every metropolitan area in the United States for 1990 and 2000. The data at the Mumford Center while looking at traditional segregation measures on a metropolitan level have also broken the data down by city and suburbs and also by tenure. The Mumford Center site suggests that dissimilarity score of .40 or .50 (or 40to 50 percent)

[33] See http://mumford.albany.edu/CensusPagesScripts/MSAinfo.asp

are considered a moderate rate of segregation and values of 30 percent or less are considered to be fairly low. Table 6-1 displays these scores for the Phoenix Metropolitan area.[34] What these data indicate is that there is a downward trend in segregation from 1990 to 2000 particularly among renters.[35] Despite this pointing to a continued inequality in terms of access to homeownership, these data do suggest that diversity is increasing among renters. Much of this increased diversity can be explained by the demographic profile of renters as noted earlier. The encouraging trend towards more integration suggested that more investigation was needed to see if this trend carried on into lower geographic units.

[34] Riverside-San Bernardino and the Las Vegas show similar tendencies. Tables for these metro areas can be found in the appendix.

[35] The purpose of displaying the data in this manner, according to the Mumford Center, is to determine whether segregation is caused by differences in homeownership. The Center cautions users of this data to consider that because minorities are less likely to buy a house (particularly blacks) that this may intensify segregation effects.

Table 6-1 Phoenix Metropolitan Area Dissimilarity Index by City and Suburbs 1990 and 2000										
Segregation of One Group from another	City						Suburb			
	1990			2000			1990			
	All members of both groups	Homeowners of both groups	Renters of both groups	All members of both groups	Homeowners of both groups	Renters of both groups	All members of both groups	Homeowners of both groups	Renters of both groups	Al memb of bo grou
White from black	49	57.1	43.2	44	47.9	35.6	42	43.6	36.3	3
White from Hispanic	44.9	47.7	41.8	50.7	53.3	46.3	49.3	50.3	45.7	4
White from Asian	26.7	26.3	31	26.2	25	29.6	39.6	44.4	32.5	3
Black from white	49	57.1	43.2	44	47.9	35.6	42	43.6	36.3	3
Black from Hispanic	28.2	37.2	27.4	28.4	34.9	27.8	37	40.5	37.1	3
Black from Asian	45.2	52.2	44.3	38.3	43.1	38.8	37.5	36.9	37.1	3
Hispanic from white	44.9	47.7	41.8	50.7	53.3	46.3	49.3	50.3	45.7	4
Hispanic from black	28.2	37.2	27.4	28.4	34.9	27.8	37	40.5	37.1	3
Hispanic from Asian	42.5	43.1	45	47.3	48.2	50.1	53.8	55.8	53.3	5
Asian from white	26.7	26.3	31	26.2	25	29.6	39.6	44.4	32.5	3
Asian from black	45.2	52.2	44.3	38.3	43.1	38.8	37.5	36.9	37.1	3
Asian from Hispanic	42.5	43.1	45	47.3	48.2	50.1	53.8	55.8	53.3	5

Source: Lewis Mumford Center for Comparative Urban Regional Research www. mumford.albany.edu/CensusPagesScri

Measuring Neighborhood Diversity

Maly (2000) observes that most studies of segregation focus on the metropolitan area as the unit of analysis. He also argues that at that geographic scale, it is difficult to learn how segregation operates at the neighborhood level. Measuring segregation at the neighborhood level requires aggregating all the census tract data upward to form the metropolitan areas rather than focusing solely on the diversity within the neighborhood itself.

Simpson's D

The most common neighborhood index originally used to measure biological diversity and has since been used to measure other forms of segregation such as economic and residential inequality is Simpson's D (Talen 2006).[36] The index (also known as "Index A", see White, Kim, and Glick 2005), measures the probability that two individuals randomly selected from a sample will belong to the same category. Diversity is defined as a uniform distribution among all categories (this can be any variable such as race, income housing type among others). Like most diversity indexes the calculation yields a number that ranges between 0 and 1. For the purposes of this analysis, I use what is sometimes called Simpson's Reciprocal Index (see also Talen 2006) that produces whole number solutions rather than fractional scores. The equation for the reciprocal form of the original Simpson D equation is:

$$\mathrm{A} = \frac{N(N-1)}{\sum_i n_i(n_i-1)}$$

[36] Maly (2000) proposed an alternative research approach that he calls the "neighborhood diversity index." This index is very similar to Simpson's D. The formula he proposes is $ND = \frac{1}{2}\left(\left|C_W - T_W\right| + \left|C_B - T_B\right| + \left|C_H - T_H\right| + \left|C_A - T_A\right|\right)$. I use Simpson's D rather than the neighborhood diversity index because the analysis also focuses on distribution of other variables in the census tracts such as income and housing types. Maly's measure was not appropriate for these other purposes.

In this equation, N is the total number of cases in each category; n_i is the number of cases in the i^{th} category. The resulting output of this equation provides whole numbers rather than the fractional numbers typically used in other diversity indices. The value of this index starts with 1 as the lowest possible figure. This figure would represent a community containing only one species. Higher values represent greater diversity. The maximum value is the number of categories used in the sample. For example if there are five categories in the sample, then the maximum value is 5. Thus, when the index equals 1, there is no diversity because there is only 1 category. The higher values indicate the degree of diversity up to the total number of categories in the sample (Talen 2006).

Diversity indices provide more information about community composition than simply the number of categories and take account of the relative abundance of each category. Consider two communities of 100 individuals each and composed of 10 different races. One community has 10 individuals of each ethnicity; the other has one individual of each of nine, and 91 individuals of the tenth ethnic group Clearly the first one is more diverse, but both communities have the same number of individuals. By taking relative abundances into account, a diversity index depends not only on the count but also on the evenness, or equitability, with which individuals are distributed among the different categories. Diversity indices also provide important information about rarity and commonness of specific categories in a community. The ability to quantify diversity in this way is an important tool to understand community structure.

Method and Data

To measure diversity in the study area, I borrow elements from the research approach outlined in Talen's (2006) article on measuring neighborhood social diversity in Chicago but add

a count of the rental gated communities in the "neighborhoods." Much as she did, I compare income diversity, housing diversity, and population diversity and also regress these variables with the incidence of rental gated communities.

In order to calculate the diversity indices, after geocoding the Rental Gated Community and aggregated the necessary variables to the census tract level, these data were matched to the Neighborhood Change Database (NCDB). The NCDB, published jointly with by the Urban Institute and Geolytics assembled census tract data for the 1970, 1980, 1990 and 2000 Census. I use the 2000 portion of the data which is derived from 2000 Census Bureaus Summary File 3 (SF3) and Summary File 1 (SF1).[37]

Table 6-2 Variables used to compute Simpson D

Diversity variable	Categories	Diversity variable	Categories
Resident Diversity		**Housing diversity**	
Race/ethnicity	White alone	Units in structure	1 unit detached
	Black alone		1 unit attached
	Asian alone or Pacific alone		2 units
	Hispanic		3 or 4 units
	Other		5–9 units
Age	5 years and under		10–19 units
	6 to 18 years		20–49 units
	19 to 34 years		50+ units
	35 to 64 years	Year built	Built 1939 or earlier
	65 years and over		Built 1940–1959
Family income	Under $20,000		Built 1960–1979
	$20,000 to $39,999		Built 1980 or later
	$40,000 to $74,999	Unit size	No bedroom
	$75,000 and over		1 bedroom
Family type	Married, with children under 18		2 bedrooms
	Married, no children under 18		3 bedrooms
	Single, with children		4 bedrooms

[37] Data from the 1970, 1980 and 1990 was not used in the analysis for a couple of reasons. First, many of the tracts in these fast growing regions either did not exist or the boundaries changed considerably. Secondly, matching it over time to the gated data did not make sense.

	under 18 Single, no children under 18 Non-family household	Housing value Monthly rent	5+ bedrooms Less than $100,000 $100,000 to $174,999 $175,000 to $299,999 $300,000 and over Under $500 $500 to $799 $800 to $1,249 $1,250 and over
Source: Adapted from Talen (2006:435) Note: All variables are from the 2000 Census, by census tract			

Results

Table 6-3
Percent White Population in Study Area Census Tracts

County	# GT 50 %	% of County	# LT 50 %	% of County	Total
Clark	205	93.6%	14	6.4%	219
Maricopa	402	92.8%	31	7.2%	433
Riverside	114	75.0%	38	25.0%	152
San Bernardino	73	62.9%	43	37.1%	116
All	794	86.3%	126	13.7%	920

One of the first things I noticed as I originally scanned the NCDB data was the prevalence of mostly white tracts. For instance, 86 percent of all tracts in the sample are majority white. By county, these percentages are Clark 94%, Maricopa 93, Riverside, 75% and San Bernardino 63%. This initially signaled that there was not going to be much diversity in any outcome but at that point, it was difficult to know whether tracts that had rental gated community were still segregated or diverse. The raw results of Simpson D scores for race/ethnicity are presented in Table 6-3 by tracts with RGCs and those without any RGCs Because Simpson's D defines diversity as the highest score and concentration as the lowest score, it was difficult to discern initially which tracts were concentrations of whites or minorities. Thus, in order to better

interpret the results the table is also broken down by whether the tract had a majority white population (over 50 percent). The table is also broken down by those tracts that contain less than 50 percent white population, which is becoming standard of a integrated neighborhood (See for example, Maly 2000, 2005; Ellen 2000 (sharing), Galster 1998).

The most important finding out of this table is that there is no score above 3 out of a total of five racial/ethnic categories used in the calculation (see Table 6-1 for the categories). What is also readily apparent is that there is very little diversity in any of the census tracts under study.

Table 6-3 also points out that there are more tracts with one or more RGCs present than those without RGC. Thus, the raw numbers do not give a proportional sense of these scores. Table 6-4 provides the percentages of tracts receiving a particular score. The largest proportions of the scores, particularly when separated by whether the census tract had more or less than 50 percent white, indicates that Clark County exhibits the most diversity in the sense that the bulk of the scores were 2—particularly in the gated communities. Maricopa County's non gated tracts had a higher percent of homogeneously white tracts than gated tracts.

Table 6-4 Number of Study Area's Census Tracts Race/Ethnicity Simpson's D Scores by Gated and Non Gated Apartments

D	Clark		Phoenix		Riverside		San Bernardino	
	Gated	Non Gated	Gated	Non Gated	Gated	Non Gated	Gated	Non Gated
Number of Census Tracts with Greater than 50 % White Population								
1	47	30	211	109	38	21	57	2
2	98	26	70	11	39	14	42	11
3	2	0	0	0	1	0	0	1
Totals	147	56	281	120	78	35	99	14
Number of Census Tracts with Less than 50 % White Population								
1	5	1	14	9	13	7	13	11
2	6	2	1	4	7	8	13	2
3	0	0	1	0	3	0	4	0
Totals	11	3	16	13	23	15	30	13
All Census Tracts								
0	0	0	1	1	4	8	2	0
1	52	31	225	118	51	28	66	13
2	104	28	71	15	46	22	55	13
3	2	0	1	0	4	0	3	1
Totals	158	59	298	134	105	58	136	27

Source: Author's calculation of Rental Community Database and NCDB
Notes: Scores were separated by gated and nongated if the tract had at least 1 rental gated community.
These Simpson D scores are based on a total of 6 categories (White, Black, Hispanic, Asian, American Indian and Other). There were no scores above 3.
Tracts with score of 1 and greater than 50 percent white population are white and segregated;
Tracts with score of 1 and less than 50 percent white are concentrations of minorities
A score of 0 indicates missing data

Table 6-5 Percent of Study Area's Census Tracts by Simpson D Scores for Race/Ethnicity by Gated and Non Gated Apartments

D	Clark			Maricopa			Riverside			San Bernardino			All Sample Tracts	
	Gated %	No Gate %	All %	Gated %	No Gate %	All %	Gated %	No Gate %	All %	Gated %	No Gate %	All %	#	%
Number of Census Tracts with Greater than 50 % White Population														
1	32.0	53.6	37.9	75.1	90.8	79.8	48.7	60.0	52.2	57.6	14.3	52.2	515	62.0
2	66.7	46.4	61.1	24.9	9.2	20.2	50.0	40.0	46.9	42.4	78.6	46.9	311	37.5
3	1.4	0.0	1.0	0.0	0.0	0.0	1.3	0.0	0.9	0.0	7.1	0.9	4	0.5
Number of Census Tracts with Less than 50 % White Population														
1	45.5	33.3	42.9	87.5	69.2	79.3	56.5	46.7	52.6	43.3	84.6	55.8	73	58.9
2	54.5	66.7	57.1	6.3	30.8	17.2	30.4	53.3	39.5	43.3	15.4	34.9	43	34.7
3	0.0	0.0	0.0	6.3	0.0	3.4	13.0	0.0	7.9	13.3	0.0	9.3	8	6.5
All Census Tracts														
0	0.0	0.0	0.0	0.3	0.7	0.5	3.8	13.8	7.4	1.5	0.0	1.2	16	1.6
1	32.9	52.5	38.2	75.5	88.1	79.4	48.6	48.3	48.5	48.5	48.1	48.5	584	59.9
2	65.8	47.5	60.8	23.8	11.2	19.9	43.8	37.9	41.7	40.4	48.1	41.7	354	36.3
3	1.3	0.0	0.9	0.3	0.0	0.2	3.8	0.0	2.5	2.2	3.7	2.5	11	1.1

Source: Author's calculation of Rental Community Database and NCDB
Notes: Scores were separated by gated and no gate if the tract had at least 1 rental gated community.
These Simpson D scores are based on a total of 6 categories (White, Black, Hispanic, Asian, American Indian and Other). There were no scores above 3.
Tracts with score of 1 and greater than 50 percent white population are white and segregated; Tracts with score of 1 and less than 50 percent white are concentrations of minorities

Income Diversity

In terms of wealth, the my analysis sought to determine whether fences/walls/gates are more important to lower income populations than higher income populations and to what extent do rental gated communities contribute to the social distance between races and classes (Simmel 1909; Caldeira 2000, 1996; Wilson-Doenges 2000). Calculating a segregation index for income diversity would indicate whether census tracts with RGCs have greater wealth disparities than those than do not have RGCs.

Table 6-5 displays the scores from these calculations. What this table indicates is that there is more income diversity than racial diversity in these census tracts. With the highest score possible being

4, the more of the census tract scored 3 or 4, indicating that these tracts have high or moderately high income diversity in the entire table. In relative terms, the percentage of gated communities and nongated communities both display the same tendencies. The observation can be made when looking at tracts that have greater than 50 percent white population or less than 50 percent white population.

Table 6-6 Number of Census Tracts with Gated and Non Gated Apartments by Simpson D Scores for Income Diversity

Simpson D Score	Clark		Phoenix		Riverside		San Bernardino	
	Gated	Non Gated	Gated	Non Gated	Gated	Non Gated	Gated	Non Gated
Number of Census Tracts with Greater than 50 % White Population								
0	0	0	1	0	0	0	0	0
1	0	0	0	0	0	0	0	0
2	6	2	14	9	1	0	2	2
3	94	30	166	64	30	15	25	7
4	43	23	95	47	45	19	33	5
Totals	143	55	276	120	76	34	60	14
Number of Census Tracts with Less than 50 % White Population								
0	0	0	1	0	0	0	0	0
1	0	0	0	0	0	0	0	0
2	0	0	2	1	2	0	4	1
3	7	2	13	9	14	7	14	9
4	4	1	1	4	6	8	12	3
Total	11	3	17	14	22	15	30	13
All Census Tracts								
0	0	0	4	1	4	8	2	0
1	0	0	0	0	0	0	0	0
2	6	2	16	10	3	0	6	3
3	101	32	179	73	44	22	39	16
4	47	24	96	51	51	27	45	8
Totals	154	58	294	135	102	57	92	27

Source: Author's calculation of Rental Community Database and NCDB
Notes: Scores were separated by gated and nongated if the tract had at least 1 rental gated community.
These Simpson D scores are based on a total of 4 categories: 1. Under $20,000; 2. $20,000 to 3. $39,999;$40,000 to $74,999; 4. $75,000 and over

What this suggests is that Kristen Maher's (2003) observations about wealthier populations requiring a pool of minority workers metropolitan areas proves to be the case here as well. These census tracts, while having pockets of minority concentrations, are surrounded by neighborhoods of more affluent residents (see also Hondagneu-Sotelo 1994).

Do Simpson D indexes predict presence of Gated Communities?

The raw percentages of Simpson's D show that RGC's are not necessarily associated with the most extreme version of segregation. Thus, in this section, I report on an Ordinary Least Square regression analysis to predict which variables better predict the presence gated communities. I regress several Diversity index variables calculated from census tract variables listed in table 6-2 along with four additional variables. The density variable is the census tract value from 2000. The other three variables are created from the RGCDB. The MPC variable notes those tracts that have properties in master planned communities; the Condo variable indicates whether the property (at the time of data collection) was converted to or in the process of converting to a condominium; and the final variable SE HABLA is a proxy variable that tallies the number of properties that actively market or encourage Hispanic clientele.

The results of the regression using the number of RGCs in the census tract are displayed in Table 6-5. This model produced an R^2 value of .33, which is a moderately strong result.

Some of the directions of the coefficients are not surprising. The presence of RGC would be predicted by younger residents, small families, small unit size (i.e. apartments not a single family home). .It was also expected that the MPC and Condo Conv variables would predict RGCs. Further, the positive coefficient for the D Income variable indicating that RGCs require higher income was also not a surprise.

This model confirms Sanchez, Lang and Dhavale (2005) finding that the presence of Hispanics is positively associated in tracts with more RGC and is highly significant at .0000. The

positive coefficients suggest that RGCs also predict slightly more diversity of both race and income but at lower densities. The coefficient for density indicates a negative association with RGC's and hence diversity in more urbanized areas. This is contrary to Talen (2006:441) and Maly (2005) who found that diversity more often associated with density in Chicago. This is also surprising considering that the *D Year* built variable suggests that RGCs are found in areas that have older buildings which would be expected to be in denser parts of the region. While I cannot be certain why this is so, I would suggest that this outcome is mostly a pattern of sprawling development patterns that are associated with these areas.[38]

Table 6-7 Results of Ordinary Least Squares Regression

Variables	Unstandardized Coefficients		Standardized Coefficients	t	Sig.
	B	Std. Error			
(Constant)	1.0217	0.4448		2.30	0.0219
D Income	0.1998	0.0857	0.0728	2.33	0.0199
D Rent	0.0716	0.0865	0.0247	0.83	0.4080
D Family type	-0.1497	0.0840	-0.0632	-1.78	0.0750
D Unit Size	-0.1644	0.0718	-0.0810	-2.29	0.0223
D Year built	-0.0912	0.0717	-0.0421	-1.27	0.2041
D Resident Age	-0.0519	0.1164	-0.0155	-0.45	0.6558
Density	0.0000	0.0000	-0.0476	-1.54	0.1234
Se Habla	0.7611	0.0506	0.4576	15.04	0.0000
D Race Ethnicity	0.2744	0.0920	0.0881	2.98	0.0029
Condo Conv.	0.5229	0.0813	0.1862	6.43	0.0000
MPC	0.4260	0.1037	0.1212	4.11	0.0000
Dependent Variable: GatedSum					
R Square	0.3336				
Adjusted R Square	0.3250				
N (Census Tracts)	864				
Notes: D=Diversity Index; MPC=Complex is in a Gated Community; SeHabla-proxy for Hispanic presence;					

[38] Another possibility is what Lang (2007) (see also Lang and Dhavale 2005) calls the San Bernardino effect, where because of the vast size of the county, density figures are often distorted because of the amount of space outside the urbanized area. I do not find this particularly likely in this case because I only included census tracts that had apartment properties in them. Upon visual inspection, these tracts were not rural or empty.

In my study areas, I expected to find some minor but increased housing opportunities for minorities with some limited integration within gated communities because of newer, less entrenched housing markets. I also had expected to find that lower income populations rely more on the gate for security than higher income populations. Depending on where the rental gated community is located, social distance will be increased by the presence of a gate. Yet, from my results, it seems that rental gated communities represent much the same social tendencies as their owned counterparts.

Besides developing a fundamental understanding of this type of rental housing, I sought to affirm whether new housing markets offer more opportunities for minorities to live in less segregated situations as suggested by the work of Crowder, Tolnay and Adelman (2001) and South and Crowder (1998). Since their work focused on metropolitan level data, my analysis drilled down to the census tract level to determine whether some micro-integration occurs at the neighborhood level (or at least the census tract level) or does the prevailing pattern of gated communities of all types still signal segregation (Maly 2005). Unfortunately, as in most segregation studies, it is often difficult to interpret whether any increased integration is due to new housing markets dynamics or general rental market dynamics that are based on all the inherent segregative processes underlying American multifamily zoning (Berry 2001).[39]

[39] Although not a completely new argument, Berry (2001) offers a model that demonstrates that the structure of zoning regulations that separate homeowners from renters effectively results in the same outcome as if racial and income zoning restrictions were in place.

Chapter 7

Conclusions and Policy Implications

The most basic conclusion I derived from this study is that rental gated communities are more like their homeowned gated community counterparts than expected. This study explored housing availability, mobility and opportunity in rental gated communities as a function of residential inequality. The research question that I sought to answer was to determine how rental gated communities might influence the "geographic opportunity structure" in terms of inequalities and do new housing markets offer more opportunities for minorities to live in less segregated situations? Based on the findings in this study, the answer is that rental gated communities in newer housing markets do not offer more opportunities to minorities, at least in the study area I looked at.

Another question I sought to answer is whether integration might be detectable at the neighborhood level or are minorities in rental gated communities still segregated? Based on the results presented here (and somewhat confirming Ellen's and Maly's work), diversity seems to be present in denser urbanized areas, which are more often older, more established areas, than in the newer less entrenched housing markets. Thus, the answer to my other research question, as to whether increased integration/segregation due to new housing markets or general rental market dynamics, seems to point to rental gated communities, even in new areas, conforming to general rental market conditions. At the outset of this study, I had expect to find some minor but increased housing opportunities for minorities with some limited integration within gated communities because of newer, less entrenched housing markets. Ironically, the regression analysis suggests that although rental housing in the study areas are in less dense areas, that older

gated apartment complexes are more diverse rather than the newer rental developments. This suggests that traditional forms of filtering are occurring even in fast growing areas but in the older core of the regions.

The development of the RGCDB allowed me investigate characteristics of gated communities that are not generally researched in the literature such as property age, property management and types of security. Some of the more noteworthy findings from this database include the fact that the majority of gated properties are newer properties, professionally managed and that gated properties many times employ more than one type security (both physical and human) on the property. In other words, the level of security in rental gated communities varies widely, particularly by age of property and wealth of residents. In addition, RGCs are as likely to have subsidies attached to the property as nongated properties. It was also unexpected to find that many RGCs were incorporated into larger master planned communities and that the entire property was subject to the same rules and regulations as individual homeowner in the development.

Some of the findings from the database confirm, although in more detail, the results of other studies. For instance, RGCs market rather extensively to Hispanics. Other expected findings are that RGCs charge more rent and hence require more income than their nongated counterparts. The database also generated estimated dates (mid to late 1980s) of when RGCs began being constructed which were predicted anecdotally by researchers such as Mike Davis. RGCs. Further, this study confirmed the extent to which RGCs are ripe targets for condominium conversions under the right economic conditions.

I also expected to find that lower income populations rely more on the gate for security than higher income populations. However, although gates are present at all points on the income scale, the reality is that gates still serve the higher income groups but that the more RGCs there are the more likely there is to be segregation. Thus, depending on where the rental gated community is located, social distance will be increased by the presence of a gate.

The final question I address is whether rental gated communities contribute to the social distance between races and classes? Using income as a metric of socioeconomic diversity as well as population diversity measures, the results here suggest (as some other sociological studies have found), that income diversity does not equal population diversity. That is, that just because minorities may have high income, it does not mean that this will translate into a spatial integration on the neighborhood level.

Despite the relatively small study area, creating a larger database using similar methods could be easily replicated for the remainder of the country. And while I would consider many of the findings here to be fairly generalizable across the United States and to some degree cross culturally, some of the findings may apply more strongly the study area or perhaps the Sunbelt portion of the United States. This is because it is more typical to build rental gated communities in fast growing regions which during the time that this product type has been popular, this product has mostly been built in the Sunbelt regions of the US. While rental gated communities are built elsewhere in the country and the numbers of them are increasing, they are far rarer in the Northwestern and Northeastern portions of the US.

Potential Policy Implications

Because rental gated communities have not been studied in great depth, this study offered the opportunity to look at neighborhoods and segregation/integration from a different perspective. The initial intent of this study was to find that rental gated communities are to some degree useful for increasing housing opportunities for minorities and as a first step to embrace the expanding diversity faced by fast growing major metropolitan areas. The discussion on the potential positive functions of gated communities has suggested that although people from all income levels do benefit from gated communities, these advantages still favor those of higher incomes. Even Rainwater's notion about the poor having to feel safe inside their homes (and by extension here, gated communities) before they can engage larger community, can be applicable to all residents who experience fear of crime and want to avoid diversity.

Based on these results, resident composition in rental gated communities, as much as their owned counterparts, point to a continuing pattern of segregation and disassociation from the larger community. In addition, it appears that these newer housing markets do little to increase housing opportunity as suggested by of Crowder, Tolnay and Adelman (2001) and South and Crowder (1998). Ironically, the opposite seems to be true, that older inner-city neighborhoods are the neighborhoods where diversity is tolerated and flourishes based Maly's (2005) and Nyden et al.'s (1997, 1998) work on stable diverse neighborhoods. Thus, as Tickamyer (2000:806) argues "spatial arrangements are both products and sources of other forms of inequality."

Squires and Kubrin (2006) pose a question that counters the ideas of Crowder, Tolnay and Adelman (2001) and South and Crowder (1998) that would undermine most findings of increased minority opportunity. They ask whether increased minority access to previously inaccessible neighborhoods is the result of higher socioeconomic status, enforcement of the Fair

Housing Act or finally perhaps a reduction of discriminatory barriers? In the face of the results reported here, it is difficult to see any lessening of discriminatory barriers despite metropolitan level changes to the contrary. Furthermore, it is somewhat disquieting to find evidence that discrimination is sprawling along with the rest of the development in these areas.

The lack of housing opportunity and mobility based on continuing discrimination patterns is exacerbated by other economic trends in these areas. At least in the recent past, housing affordability has been a real problem in the study area, particularly in California. Because RGCs are ripe targets for condominium conversion, the rental housing supply available is diminishing as rents are expected to go up as a consequence. Construction trends in multifamily properties do not bode well for easing this undersupply anytime soon. Thus these regions are facing an acute affordable housing preservation issue when economic conditions improve. The only bright spot in this issue at the moment is that many condominium conversions have been delayed because of market conditions. In fact, many of these conversions have switched back to operating as rental properties as a stopgap measure.

This study has shown that permitting RGCs in a city has some significant outcomes for minorities. Planners need to assess more carefully what the potential unintended outcomes of the siting decisions they make everyday. First, allowing unfettered condo conversions chokes the already limited supply of rental housing. Although part of the limited multifamily supply is due to existing zoning and potential NIMBY opposition to more projects, condo conversions just add fuel to the fire. The more beneficial route to correcting some of these consequences to more carefully review land use laws and zoning to perhaps limit the number of conversions either citywide or in a particular area much like accessory housing units are limited.

The other unintended outcome is that many of these permitted RGCs reduce the potential for social diversity on a local scale. The study area has demonstrated a capacity to support varied income levels. But encouraging racial diversity will require a whole other support system that most likely doe not exist at the necessary scale. This tendency is much more evident in cities that have chosen to cede much of their governmental powers to homeowned gated communities and their inwardly looking private governments.

Based on the discussion of the positive functions of gated communities, planners might actually reconsider the benefits of including gated rental communities as a planning tool. In certain situations, gated properties (both rental and owned) can serve as a economic development tools in gentrifying areas. It might be advisable to have all affordable housing development walled and gated, particularly those in unsafe areas or more industrial/commercial parts of the city because of the potential psychological benefits conferred to residents about increased safety. In addition, rental gated communities offer a mitigation solution to those homeowners who do not want rental housing nearby. By gating rental housing, NIMBY fears about the spillover effects from multifamily housing such as property devaluation can be diminished or eliminated. Indeed, in developing countries, the presence of gating higher income communities (whether owned or rented) represents an infrastructure commitment to an underdeveloped portion of a country.

Directions for Future Research

An obvious extension of this research would be to continue adding properties to the RGCDB from other areas of the United State to see if these same trends hold nationwide. Furthermore, it was difficult to get reliable data about the extent of gating in public housing and

other subsidized housing so another direction would be to conduct a more detailed survey of these properties across the country.

Another area to explore would be to look at positive aspects of rental gated communities in more depth. I believe the most compelling of these positive aspects are the economic development potential of rental gated communities, particularly in gentrifying areas.

Conducting a comparison on the efficacy of other measures of diversity, originally developed to understand species diversity in ecological studies, applied to neighborhood studies would also be another direction for future research. This study also suggest that rental gate communities does not only represent population segregation but also land use segregation. Thus, another area that would warrant further investigation is to understand in more depth why and how often gates on rental communities are used to reduce neighboring NIMBY concerns.

The major finding of this study is that RGCs continue the pattern of residential segregation. However, it does not address the relationship between RGCs and crime, which many researchers note has not been systematically investigated. Part of the reason for excluding that from this study is that the most widely available crime statistics, the Uniform Crime Statistics available from the US Department Justice, have been found to have many methodological problems that challenge some of the validity of the data. However, the Justice Department's Victimization study offers a potentially fruitful source to continue studying both owned and rented gated communities. While this database has been compiled for many years, the 2004 edition of the survey added a question asking the respondent whether they lived in a gated community and if they owned or rented their housing unit. This survey opens up a whole new area of investigation, not only looking at the relationship between crime and gated

communities but more race/ethnicity detail and some additional detail about the environment where the crime occurred.

Crime would be another important line of research because of the "uncertainty" in society and recent government policies that have pushed responsibility for crime management more onto the victim.[40] Since gated communities (both rented and owned) were the first solution to this problem, it would be useful to understand, in a more systematic sense, how useful gates are in reducing crime. By extension, if in fact, crime is not any better or worse in gated or nongated communities, this research would give more weight to those who are questioning the efficacy of gating as a crime prevention technique and what might be a better solution to allay residents' fears.

While it has been shown that gates serve multiple purposes[41], a study on crime would serve to reassess whether communities should encourage this neighborhood form for crime prevention. If in fact, gates do not really serve this purpose, perhaps a more interesting area of investigation might be the extent to which gated communities, either owned or rented are a transitional community form. But if, as some suggest, that residents begin to question the usefulness of the gated community form, what will these new communities look like? Some observers have already suggested that more and more control will be yielded to increasing smaller units of "volunteer" governments but under the "directed governance." Several anecdotal accounts around the country suggest that some communities are already in the process of reevaluating the gated community form and exploring these alternate governance forms.. It is difficult see to how this process would work on a national scale but it certainly presents an interesting look at the future prospects of the gated community form.

[40] Understanding the crime rate in gated public housing would also be another avenue to explore.
[41] Gates used a design element that confers prestige would probably continue to persist beyond the need for crime prevention.

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Appendix A
Additional Rental Gated Community Database Tables

Estimated Annual Income Need to Qualify for Gated and Non Gated Properties (in dollars)								
County/ Income Figures	Minimum 2.5X Rent		Maximum 2.5X Rent		Minimum 3X Rent		Maximum 3X Rent	
	Gated	Non Gated	Gated	Non Gated	Gated	Non Gated	Gated	Non Gated
Clark (MSA Median Income 2007 $60,100)								
Mean	22,038	19,708	30,453	25,282	26,446	23,650	36,543	30,339
Median	22,500	19,500	30,000	24,720	27,000	23,400	36,000	29,664
Mode	17,790	21,000	24,720	20,250	21,348	25,200	29,664	24,300
Range	47,550	44,250	114,150	93,750	57,060	53,100	136,980	112,500
Minimum	0	9,750	11,850	11,250	0	11,700	14,220	13,500
Maximum	47,550	54,000	126,000	105,000	57,060	64,800	151,200	126,000
Maricopa (2006 MSA Median Income $60,100)								
Mean	20,163	17,096	29,129	22,869	24,196	20,516	34,954	27,443
Median	19,950	16,470	27,000	21,300	23,940	19,764	32,400	25,560
Mode	17,250	15,750	19,500	18,750	20,700	18,900	23,400	22,500
Range	56,100	94,800	85,650	172,080	67,320	113,760	102,780	206,496
Minimum	9,900	1,200	10,200	7,920	11,880	1,440	12,240	9,504
Maximum	66,000	96,000	95,850	180,000	79,200	115,200	115,020	216,000
Riverside (MSA Median Income $59,200)								
Mean	25,787	22,507	35,070	29,683	30,945	27,009	42,084	35,620
Median	25,500	23,250	32,850	28,800	30,600	27,900	39,420	34,560
Mode	26,250	21,000	25,500	30,750	31,500	25,200	30,600	36,900
Range	32,550	39,000	55,650	54,240	39,060	46,800	66,780	65,088
Minimum	10,200	0	14,250	10,110	12,240	0	17,100	12,132
Maximum	42,750	39,000	69,900	64,350	51,300	46,800	83,880	77,220
San Bernardino (MSA Median Income $59,200)								
Mean	27,007	24,946	35,630	31,762	32,408	29,935	42,757	38,114
Median	26,850	25,500	33,300	30,000	32,220	30,600	39,960	36,000
Mode	27,750	19,500	37,500	25,500	33,300	23,400	45,000	30,600
Range	36,000	47,850	64,230	63,150	43,200	57,420	77,076	75,780
Minimum	11,550	0	13,770	8,850	13,860	0	16,524	10,620
Maximum	47,550	47,850	78,000	72,000	57,060	57,420	93,600	86,400

Source: Author's tabulations of the Rental Gated Community Database and HUD's 2007 estimate of Median Income
Notes: Minimum and Maximum figures are based on lowest monthly rent reported by property, usually for an efficiency or one bedroom unit. Minimum most often refers to efficiency or one bedroom, maximum rent usually is rent for a unit with 3 bedrooms or more. In some cases the minimum and maximum may be the same because the property has only one unit type available and a single rent charge. Annualized figure is calculated by multiplying original monthly figure by 12

Year Operational Measures of Central Tendency													
Measure	All Cases	Clark			Maricopa			Riverside			San Bernardino		
		All	Gated	Non Gated	All	Gated	Non Gated	All	Gated	Non Gated	All	Gated	Non Gated
Mean	1986	1991	1995	1987	1983	1989	1979	1990	1991	1990	1986	1988	1984
Median	1986	1992	1997	1988	1984	1987	1981	1989	1989	1990	1986	1987	1985
Mode	1986	1989	1998	1988	1986	1986	1985	1987	2006	1987	1986	1986	1985
Range Low	1924	1949	1956	1949	1940	1940	1940	1924	1924	1950	1945	1945	1955
Range High	2009	2009	2006	2007	2007	2007	2007	2008	2007	2008	2007	2007	2007
Valid		448			1501			393			282		

Year Properties Operational By County 5 Year Intervals										
County	Year Properties Operational	Gated	% Gated Year	% Gated	% of Total	Not Gated	% Not Gated Year	%Not Gated	% of Total	Total
Clark	<= 1949	0	0.0	0.0	0.0	1	100.0	0.5	0.2	1
	1950 - 1954	0	0.0	0.0	0.0	1	100.0	0.5	0.2	1
	1955 - 1959	1	100.0	0.4	0.2	0	0.0	0.0	0.0	1
	1960 - 1964	3	21.4	1.3	0.7	11	78.6	5.1	2.5	14
	1965 - 1969	1	25.0	0.4	0.2	3	75.0	1.4	0.7	4
	1970 - 1974	7	46.7	3.0	1.6	8	53.3	3.7	1.8	15
	1975 - 1979	4	13.8	1.7	0.9	25	86.2	11.6	5.6	29
	1980 - 1984	4	12.5	1.7	0.9	28	87.5	13.0	6.3	32
	1985 - 1989	32	37.6	13.7	7.1	53	62.4	24.7	11.8	85
	1990 - 1994	29	46.0	12.4	6.5	34	54.0	15.8	7.6	63
	1995 - 1999	82	78.1	35.2	18.3	23	21.9	10.7	5.1	105
	2000 - 2004	56	74.7	24.0	12.5	19	25.3	8.8	4.2	75
	2005+	14	60.9	6.0	3.1	9	39.1	4.2	2.0	23
County Totals		233	52.0	100.0	52.0	215	48.0	100.0	48.0	448
Maricopa	<= 1949	3	42.9	0.5	0.2	4	57.1	0.4	0.3	7
	1950 - 1954	1	12.5	0.2	0.1	7	87.5	0.8	0.5	8
	1955 - 1959	0	0.0	0.0	0.0	22	100.0	2.4	1.5	22
	1960 - 1964	13	14.0	2.3	0.9	80	86.0	8.6	5.3	93
	1965 - 1969	14	20.9	2.4	0.9	53	79.1	5.7	3.5	67
	1970 - 1974	30	17.0	5.2	2.0	146	83.0	15.8	9.7	176
	1975 - 1979	30	26.8	5.2	2.0	82	73.2	8.9	5.5	112
	1980 - 1984	88	28.9	15.3	5.9	216	71.1	23.3	14.4	304
	1985 - 1989	129	40.3	22.4	8.6	191	59.7	20.6	12.7	320
	1990 - 1994	14	37.8	2.4	0.9	23	62.2	2.5	1.5	37
	1995 - 1999	109	72.2	19.0	7.3	42	27.8	4.5	2.8	151
	2000 - 2004	114	69.1	19.8	7.6	51	30.9	5.5	3.4	165
	2005+	30	76.9	5.2	2.0	9	23.1	1.0	0.6	39
County Totals		575	38.3	100.0	38.3	926	61.7	100.0	61.7	1501

Year Properties Operational by County 5 Year Intervals (Continued)										
County	Year Properties Operational	Gated	% Gated Year	% Gated	% of Total	Not Gated	% Not Gated Year	%Not Gated	% of Total	Total
Riverside	<= 1949	1	100.0	0.5	0.3	0	0.0	0.0	0.0	1
	1950 - 1954	0	0.0	0.0	0.0	1	100.0	0.5	0.3	1
	1955 - 1959	1	50.0	0.5	0.3	1	50.0	0.5	0.3	2
	1960 - 1964	4	66.7	2.1	1.0	2	33.3	1.0	0.5	6
	1965 - 1969	4	50.0	2.1	1.0	4	50.0	2.0	1.0	8
	1970 - 1974	12	46.2	6.3	3.1	14	53.8	6.9	3.6	26
	1975 - 1979	12	52.2	6.3	3.1	11	47.8	5.4	2.8	23
	1980 - 1984	12	34.3	6.3	3.1	23	65.7	11.3	5.9	35
	1985 - 1989	52	54.2	27.5	13.2	44	45.8	21.6	11.2	96
	1990 - 1994	14	38.9	7.4	3.6	22	61.1	10.8	5.6	36
	1995 - 1999	18	40.9	9.5	4.6	26	59.1	12.7	6.6	44
	2000 - 2004	23	41.1	12.2	5.9	33	58.9	16.2	8.4	56
	2005+	36	61.0	19.0	9.2	23	39.0	11.3	5.9	59
County Totals		189	48.1	100.0	48.1	204	51.9	100.0	51.9	393
San Bernardino	<= 1949	1	100.0	0.6	0.4	0	0.0	0.0	0.0	1
	1950 - 1954	1	100.0	0.6	0.4	0	0.0	0.0	0.0	1
	1955 - 1959	0	0.0	0.0	0.0	2	100.0	1.7	0.7	2
	1960 - 1964	3	60.0	1.8	1.1	2	40.0	1.7	0.7	5
	1965 - 1969	4	50.0	2.4	1.4	4	50.0	3.5	1.4	8
	1970 - 1974	13	50.0	7.8	4.6	13	50.0	11.3	4.6	26
	1975 - 1979	8	34.8	4.8	2.8	15	65.2	13.0	5.3	23
	1980 - 1984	17	58.6	10.2	6.0	12	41.4	10.4	4.3	29
	1985 - 1989	67	61.5	40.1	23.8	42	38.5	36.5	14.9	109
	1990 - 1994	14	63.6	8.4	5.0	8	36.4	7.0	2.8	22
	1995 - 1999	3	33.3	1.8	1.1	6	66.7	5.2	2.1	9
	2000 - 2004	19	82.6	11.4	6.7	4	17.4	3.5	1.4	23
	2005+	17	70.8	10.2	6.0	7	29.2	6.1	2.5	24
County Totals		167	59.2	100.0	59.2	115	40.8	100.0	40.8	282

Rent in Gated and Non Gated Rental Communities (in dollars)				
County/ Measure	Gated		Not Gated	
	Min	Max	Min	Max
Clark				
Mean	$735	$1,015	$657	$843
Median	750	1,000	650	824
Mode	593	824	700	675
Range	1,585	3,805	1,475	3,125
Minimum	0	395	325	375
Maximum	1,585	4,200	1,800	3,500
N	320	320	305	305
Maricopa				
Mean	$672	$971	$570	$762
Median	665	900	549	710
Mode	575	650	525	625
Range	1,870	2,855	3,160	5,736
Minimum	330	340	40	264
Maximum	2,200	3,195	781	777
N	577	577	449	575
Riverside				
Mean	$860	$1,169	$750	$989
Median	850	1,095	775	960
Mode	875	850	700	1,025
Range	1,085	1,855	1,300	1,808
Minimum	340	475	0	337
Maximum	1,425	2,330	1,300	2,145
N	199	199	145	144
San Bernardino				
Mean	$900	$1,188	$832	$1,059
Median	895	1,110	850	1,000
Mode	925	1,250	650	850
Range	1,200	2,141	1,595	2,105
Minimum	385	459	0	295
Maximum	1,585	2,600	1,595	2,400
N	210	211	177	177

HUD 2007 Income Limits				
FY 2007 Income Limit Category	**1 Person**	**2 Person**	**3 Person**	**4 Person**
Las Vegas-Paradise, NV MSA 2007 Median Income $60,100				
Very Low (50%) Income	$21,050	$24,050	$27,050	$30,050
Extremely Low (30%) Income	$12,650	$14,450	$16,250	$18,050
Low (80%) Income	$33,650	$38,500	$43,300	$48,100
Phoenix-Mesa-Scottsdale, AZ MSA 2007 Median Income $59,100				
Very Low (50%) Income	$21,050	$24,050	$27,050	$30,050
Extremely Low (30%) Income	$12,650	$14,450	$16,250	$18,050
Low (80%) Income	$33,650	$38,500	$43,300	$48,100
Riverside-San Bernardino-Ontario, CA MSA 2007 Median Income $59,200				
Very Low (50%) Income	$20,700	$23,700	$26,650	$29,600
Extremely Low (30%) Income	$12,450	$14,200	$16,000	$17,750
Low (80%) Income	$33,150	$37,900	$42,600	$47,350

Table 6-1 Phoenix Metropolitan Area Dissimilarity Index by City and Suburbs 1990 and 2000												
Segregation of One Group from another	City						Suburb					
	1990			2000			1990			2000		
	All members of both groups	Homeowners of both groups	Renters of both groups	All members of both groups	Homeowners of both groups	Renters of both groups	All members of both groups	Homeowners of both groups	Renters of both groups	All members of both groups	Homeowners of both groups	Renters of both groups
White from black	49	57.1	43.2	44	47.9	35.6	42	43.6	36.3	38.6	36.5	37.1
White from Hispanic	44.9	47.7	41.8	50.7	53.3	46.3	49.3	50.3	45.7	46.1	43.9	45.6
White from Asian	26.7	26.3	31	26.2	25	29.6	39.6	44.4	32.5	39.4	40.9	37.7
Black from white	49	57.1	43.2	44	47.9	35.6	42	43.6	36.3	38.6	36.5	37.1
Black from Hispanic	28.2	37.2	27.4	28.4	34.9	27.8	37	40.5	37.1	32.3	33.7	36
Black from Asian	45.2	52.2	44.3	38.3	43.1	38.8	37.5	36.9	37.1	32.8	30.8	41
Hispanic from white	44.9	47.7	41.8	50.7	53.3	46.3	49.3	50.3	45.7	46.1	43.9	45.6
Hispanic from black	28.2	37.2	27.4	28.4	34.9	27.8	37	40.5	37.1	32.3	33.7	36
Hispanic from Asian	42.5	43.1	45	47.3	48.2	50.1	53.8	55.8	53.3	50.1	48.4	56.3
Asian from white	26.7	26.3	31	26.2	25	29.6	39.6	44.4	32.5	39.4	40.9	37.7
Asian from black	45.2	52.2	44.3	38.3	43.1	38.8	37.5	36.9	37.1	32.8	30.8	41
Asian from Hispanic	42.5	43.1	45	47.3	48.2	50.1	53.8	55.8	53.3	50.1	48.4	56.3
Source: Lewis Mumford Center for Comparative Urban Regional Research www. mumford.albany.edu/CensusPagesScripts/MSAinfo.asp												

Las Vegas Metropolitan Area Dissimilarity Index by City and Suburbs 1990 and 2000												
Segregation of One Group from another	City						Suburb					
	1990			2000			1990			2000		
	All members of both groups	Homeowners of both groups	Renters of both groups	All members of both groups	Homeowners of both groups	Renters of both groups	All members of both groups	Homeowners of both groups	Renters of both groups	All members of both groups	Homeowners of both groups	Renters of both groups
White from black	46.3	48.4	43.4	36.8	31.3	34.9	48	55.9	39.4	44.1	46.4	37.9
White from Hispanic	31.2	22.8	34.3	43.2	41.1	42.6	23.6	23.5	20.5	35.6	34	35.4
White from Asian	24.3	21.1	30.9	16.6	19.3	17.4	30.4	37.8	25	35.5	40.3	30
Black from white	46.3	48.4	43.4	36.8	31.3	34.9	48	55.9	39.4	44.1	46.4	37.9
Black from Hispanic	40.2	48.6	38.1	31.8	39.4	30.2	34.8	44.7	30.2	28.4	35	28.1
Black from Asian	42.5	51.4	41.1	32	30.9	31.7	41.6	49.3	37.3	36.8	40.3	35.2
Hispanic from white	31.2	22.8	34.3	43.2	41.1	42.6	23.6	23.5	20.5	35.6	34	35.4
Hispanic from black	40.2	48.6	38.1	31.8	39.4	30.2	34.8	44.7	30.2	28.4	35	28.1
Hispanic from Asian	18.4	15.4	18.6	36.4	37.2	34.7	26.2	30.9	24.3	37	39.1	34.6
Asian from white	46.3	48.4	43.4	36.8	31.3	34.9	48	55.9	39.4	44.1	46.4	37.9
Asian from black	31.2	22.8	34.3	43.2	41.1	42.6	23.6	23.5	20.5	35.6	34	35.4
Asian from Hispanic	24.3	21.1	30.9	16.6	19.3	17.4	30.4	37.8	25	35.5	40.3	30

Source: Lewis Mumford Center for Comparative Urban Regional Research www. mumford.albany.edu/CensusPagesScripts/MSAinfo.asp

Riverside San Bernardino Metropolitan Area Dissimilarity Index by City and Suburbs 1990 and 2000												
Segregation of One Group from another	**City**						**Suburb**					
	1990			**2000**			**1990**			**2000**		
	All members of both groups	**Homeowners of both groups**	**Renters of both groups**	**All members of both groups**	**Homeowners of both groups**	**Renters of both groups**	**All members of both groups**	**Homeowners of both groups**	**Renters of both groups**	**All members of both groups**	**Homeowners of both groups**	**Renters of both groups**
White from black	48.9	54.1	43.3	48.3	49.9	44.3	44.6	46.8	39.8	45.8	47.4	41.5
White from Hispanic	38	40.9	36.3	40.2	44.4	34.3	34.2	33.9	35	40.9	40.8	40
White from Asian	32.2	32.4	34.5	36.8	34.9	40.1	37.1	40.7	33.4	40.5	42.2	38.6
Black from white	48.9	54.1	43.3	48.3	49.9	44.3	44.6	46.8	39.8	45.8	47.4	41.5
Black from Hispanic	31.1	37.7	31.8	29.4	34.6	29.9	37	37.1	41.8	34.5	35.3	37.8
Black from Asian	39.3	49.8	35	40.8	40.7	41.9	35.5	38.9	31.9	36	36.1	35.4
Hispanic from white	38	40.9	36.3	40.2	44.4	34.3	34.2	33.9	35	40.9	40.8	40
Hispanic from black	31.1	37.7	31.8	29.4	34.6	29.9	37	37.1	41.8	34.5	35.3	37.8
Hispanic from Asian	32.7	36.9	37.1	38.3	39.1	41	37.2	36.7	39.2	40.8	41.4	42
Asian from white	32.2	32.4	34.5	36.8	34.9	40.1	37.1	40.7	33.4	40.5	42.2	38.6
Asian from black	39.3	49.8	35	40.8	40.7	41.9	35.5	38.9	31.9	36	36.1	35.4
Asian from Hispanic	32.7	36.9	37.1	38.3	39.1	41	37.2	36.7	39.2	40.8	41.4	42
Source: Lewis Mumford Center for Comparative Urban Regional Research www. mumford.albany.edu/CensusPagesScripts/MSAinfo.asp												

Percent White Population in Study Area Census Tracts					
County	# GT 50 %	% of County	# LT 50 %	% of County	Total
Clark	205	93.6%	14	6.4%	219
Maricopa	402	92.8%	31	7.2%	433
Riverside	114	75.0%	38	25.0%	152
San Bernardino	73	62.9%	43	37.1%	116
All	794	86.3%	126	13.7%	920

APPENDIX B

Rental Gated Community Database Code Book

Variables and Definitions

1. Case

Unique case number
Format: Case number.FIPS state code (04 for Arizona, 06 for California, 32 for Nevada)

2. Census Tract

2006 Census tract designation

3. Block Group

Census Block group

4. Source

Web based and other sources of data

AG=Apartment Guide
APTC=Apartmentcities.com
APTS=Apartments.com
EAM=Every Apartment Mapped.com
RN=Rentnet.com
AptMag=Apartment Magazine.com
HUD=Department of Housing and Urban Development
FR=ForRent.com
PR=Pararentar.com
Aptsch=apartmentsearch.com,
AZH=Arizona Housing
Loopnet=Loopnet.com

5. Gated

Property is gated or access controlled
1=Yes

6. SEC

Additional levels of security offered by property

1=Courtesy patrol
2=24 hour gate
3=Both courtesy patrol and 24 hour gate

4=24 hour gate & security guard at gate
5=Gated parking
6=Gated other (Dog park)
7=Retro (Property had gate installed after initial construction)

7. PG

Property has playground or other service aimed at children

1=PG (Playground on property)
2=Daycare or preschool available on property
3=Both Playground and Daycare available on Property
4=Playground is gated

8. INGUIDE

INGUIDE=Income Guidelines Apply

Property has some subsidy in place

1=Yes

9. LIHTC

Property has received Low Income Housing Tax Credit subsidy
1=Y

10. TEB

Property has received Tax Exempt Bond subsidy
1=Y

11. Sec8

Property accepts Sec8 vouchers (Housing Choice Vouchers)
1=Y

12. 202

Property has received Section 202 subsidy
1=Y

13. 221

Property has received Section 221(d)(4) subsidy
1=Y

14. 223

Property has received Section 223(a)(7) or section 223(f) subsidy
1=Y

15. 236

Property has received Section 236 subsidy
1=Y

16. 811

Property has received Section 811 subsidy
1=Y

17. HOME

Property has received HOME subsidy
1=Y

18. CONDO

Property has turned condo, is in the process of converting to condo or built to condo standards
1=Y

19. MPC

Rental property is part of master planned community and subject to CC&R

20. Name

Rental Property Name

21. Address

Rental property street location

22. City

City where rental property located

23. State

State where property located

24. Zipcode

Zip code for property

25. Phone

Business phone number for property

26. Min Rent

Minimum monthly rent charged for smallest apartment in dollars

27. Max Rent

Maximum monthly rent charged for largest apartment in dollars

28. MinBR

Minimum number of bedrooms apartment available on property

29. MaxBR

Maximum number of bedrooms per apartment available on property

30. SPFEATURE

Special apartment configurations available on property

1=Loft
2=Townhouse
3=Single family home (apartments designed as single floor, detached dwellings, garage, driveway and separate lot)
4=Penthouse
5=Quad (student housing; 1 apartment with four bedrooms and large common area, with separate lease for each bedroom)
6=Townhouse and Loft apartments are available either separately or together in the same apartment

31. MinSF

Minimum square footage of smallest apartments

32. MaxSF

Maximum square footage of largest apartments

33. Units

Total number of units on property (may or may not include manager's apartment in total)

34. Built

Year property built and operational

35. Remodeled

Year property remodeled

36. Managed

Type of property management company (if any)

1=Professional management company or other real estate company
2=REIT (Real Estate Investment Trust)
3=Owner managed
4=Nonprofit organization

37. Se Habla

Property has bilingual staff or advertises in Spanish apartment listing service
1=Y

38. SR

Property is designated for seniors or age restricted 55+

1=Y

39. Floors

Number of floors per apartment structure