



Marketing Plan 2014



SUN CITY
WEST

Arizona's Premier Active Adult Golf Community

As Sun City West moves into its fourth decade, this Marketing Plan helps ensure the Association's success and the community's future well-being by outlining a slate of programs, activities and facility improvements to meet the demands of incoming and existing residents. The plan also dictates continued promotion of the many existing activities, events and amenities, allowing us to take better advantage of tools already in place.

The Best Way to
Predict the Future Is to
Create It

Predicting a Bright Future for Sun City West Through Diverse Programs and Promotions

Special thanks to the RCSCW Marketing Team
for their dedication and commitment to improving the Sun City West Lifestyle

David Bennett, Beardsley and RH Johnson Recreation Center Supervisor

Barry Hardesty, Sports Pavilion Manager

Deborah Hevesy, Multimedia Specialist

Jason Hiller, Webmaster and Graphics Designer

Jane Kauzlaric, Library Director

Jim Keane, Financial Analyst

Cindy Knowlton, Recreation Activities Manager

Roger Lansberry, Chief Financial Officer

Tani LeClair, Sports Pavilion Marketing Coordinator

Pat O'Hara, Golf Operations Manager

Todd Patty, Environmental Services Manager

Mel Shirey, Sports Pavilion Tournament Coordinator

Katie Van Leuven, Village Store Supervisor

Mike Whiting, General Manager

Chair: **Katy O'Grady**, General Services Officer

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**SUN CITY
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Recreation Centers of Sun City West Inc. Marketing Plan

May 14, 2014

1.0 Executive Summary

The Recreation Centers of Sun City West Inc. is a 501(c) 4 non-profit company organized to provide recreational and social opportunities to some 29,000 Association owner-members in Sun City West. The Association offers a broad variety of opportunities to meet the needs of a 50-year age span ranging from Baby Boomers to Greatest Generation members.

As the community's demographics change, there is an increasing need to ensure the amenities and recreational opportunities meet the needs and wants of the owner-members. The Association's goal is to find new and creative ways to involve new owner-members in existing activities, clubs and events; and where necessary, create new events and amenities to ensure the community grows as a vibrant, attractive destination for active-adults.

The Association values the community's membership requirement and aims to preserve it for the benefit of Association members, but also recognizes the need to supplement the fixed market base by attracting, through controlled programs, outside players to participate in fee-based programs. Residents always will be given priority in using the amenities, and non-residents will be charged a premium rate for those amenities that are open on a limited basis.

The major challenges moving forward are branding Sun City West as the premier active-adult community in Arizona with an image and logo all its own; and balancing the needs of current Association owner-members while finding ways to attract newcomers. All of this must be done with an eye toward keeping our annual owner-member dues and fees reasonable in the face of new competing age-restricted communities. And of course, to remain vital, we must commit enough capital funding to maintain and operate our amenities at the Sun City West level that our residents have come to expect.

We will enhance our marketing and public relations efforts as it relates to Sun City West's image and branding, and put forth an increased number of special events and activities. Getting the word out about our service and amenities, combined with financially competitive rates, will make us an unparalleled active-adult community for future generations.

2.0 Situation Analysis

- 2.1 The Market:** Externally, we will target our promotions to attract middle-income to upper-income active adults 55 and older looking to live in a debt-free, well maintained but affordable retirement community. They will be golfers, bowlers and socially and physically active individuals. Internally, we will create and market events and activities to our existing residents.
- 2.2 Market Needs:** The age-restricted retirement community business is trending toward higher fees and fewer amenities. There is a need for affordable, amenity-rich communities. We fit that need, but need to better promote ourselves to attract individuals looking for amenities.

Reasons for moving to SCW: Amenities that were available				
	Not Important	Somewhat Important	Important	Very Important
Female Boomers	4%	9%	34%	53%
Male Boomers	3%	7%	28%	63%
Female Non-Boomers	5%	8%	31%	56%
Male Non-Boomers	4%	7%	35%	54%
<i>Data from Sun City West's 2008 Baby Boomer study.</i>				
<i>Chart 2.1</i>				

2.3 Market Demographics: The average age of existing residents is above 74 and will continue to increase before the regentrification process begins lowering that average again. The income and education levels vary widely. Our target market is aged 55-65, active in golf and/or bowling, etc., socially inclined, with middle- to upper-level income. Our target audience is looking for an active, diverse lifestyle with modern, attractive, state-of-the-art amenities, and unique, quality entertainment and events.

2.4 Market Growth: Baby Boomers (those born between 1946 and 1960) began turning 55 in 2001, meaning there is a large market of potential homebuyers. There are an estimated 77.5 million Boomers, and they are among the wealthiest generations in American history.

3.0 Market Trends: Along with offering fewer amenities and charging higher fees, the new active-adult communities are high-tech, offer social gathering centers, lifelong learning programs, sports-themed atmospheres. The newer communities are smaller, more country club style, and the homes and lots are smaller. We know from the market surveys that most retirees will choose to move close to home if they do move; we should therefore target most of our efforts within Maricopa County.

Market Trends	
Careerbuilder.com survey –Jan. 2014	Only 1 in 20 boomers likely to move around; most boomers will stay where they already live. If they do move: <ul style="list-style-type: none"> • They will move to be near their children and grandchildren • They will relocate to areas with a lower cost of living • They will choose less congested areas • They will move into senior living facilities
Del Webb’s 2012 Baby Boomer Survey	<ul style="list-style-type: none"> • 62% think when they retire they will continue to live in their current state of residence • 35% plan to retire and move to a different state • 43% plan to retire and stay in the same city where they currently live • Boomers want communities that age friendly, including those with accessible transportation, opportunities for lifelong learning, and opportunities for civic engagement through working or volunteering.
<i>Chart 3.1</i>	

We also have a strong profile of the individuals who might prospectively move to Sun City West. More 55-plus residents are working, are less involved in churches, are less inclined to volunteer – or will volunteer differently than our existing residents - but are more inclined to donate to non-profit organizations. They are also more inclined to be involved in a variety of activities and hobbies, rather than just a few. Nationally, there are fewer golfers and they play fewer rounds.

Baby Boomer Stats	
<i>From Del Webb's 2012 Baby Boomer Study</i>	<ul style="list-style-type: none"> • 68% would rather lend their child financial support than allow them to move back home
	<ul style="list-style-type: none"> • 62% want to focus on activities and hobbies that enhance physical /mental well-being
	<ul style="list-style-type: none"> • 32% want to live within 20 miles of their children or grandchildren upon retirement
	<ul style="list-style-type: none"> • 51 percent anticipate spending more time focusing on family
	<ul style="list-style-type: none"> • 30 percent anticipate their job will be a primary focus
	<ul style="list-style-type: none"> • 34 percent will focus on traveling
<i>March 2014 Gallup Poll</i>	<ul style="list-style-type: none"> • Average retirement age is growing; currently at 61, and 20 years ago it was at 57:
<i>Second50years.com Active retirement communities 2013</i>	<ul style="list-style-type: none"> • People reaching retirement age want to live in active communities; communities filled with doing as opposed to waiting – retire and begin an era of activity
Chart 3.2	

Additionally, we know from the surveys that more Boomers plan to work past traditional retirement age. Some are doing this for financial reasons. Others to keep their minds busy.

Work Trends	
<i>Barclays Wealth Insight 2014 Report</i>	<p>“Nevertirees” – increasing numbers of people 55+ choose to stay in the workforce</p> <ul style="list-style-type: none"> • 50% of Del Webb residents are still engaged in the workforce • 72% of those born in 1960 plan to work in “retirement” • 74% of those born in 1946 plan to work during this time
<i>March 2014 Gallup Poll</i>	<p>Three quarters of workers plan on delaying retirement:</p> <ul style="list-style-type: none"> • 40% of people who are going to delay retirement expect to do so because they want to rather than out of necessity • Many boomers are electing to pursue an encore career – one that combines both their passions and a sense of purpose
<i>Del Webb's 2012 Baby Boomer Study</i>	<ul style="list-style-type: none"> • 50% of current retirees work part-time or have started new businesses or careers • 51% plan to work full-time either in their current or at an entirely new job • 18% anticipate doing something different than their current career • 28% anticipate working part-time or having a flexible schedule • 21% anticipate no longer working for a paycheck <p>Some boomers are making a deliberate choice to work longer for other reasons:</p> <ul style="list-style-type: none"> • 51% to ward off boredom/maintain a sense of purpose • 46% like to work and are doing it for self-satisfaction • 29% want to maintain insurance benefits • 6% want to spend time away from spouse/significant other
Chart 3.3	

And finally, our Market Trends capture the growing body of statistics related to retirees' Internet, smart phone and tablet habits. Research on older adults and technology use shows two different groups of older American emerge. The first group leans toward younger, more highly educated, or more affluent seniors who have relatively substantial technology assets and a positive view toward the benefits of online platforms.

50+ Internet Usage	
<i>Nielsen Norman Group 2012 survey</i>	Seniors use the internet and broadband at rates approaching – or even exceeding – the general population <ul style="list-style-type: none"> • 19 million American seniors on the Internet, 16% growth rate in decade • In contrast, Internet users aged 30-49 increased only 3%
<i>Pew Research Internet Project – April 2014</i>	<ul style="list-style-type: none"> • 59% of seniors report they go online (a 6% increase in one year) • 77% have a cell phone (up from 69% in 2012) • Annual household income of \$75,000 or more: 90% go online • Annual household earning less than \$30,000: 39% go online
Chart 3.4	

The second group tends to be older and less affluent, often with significant health or disability challenges. This group is largely disconnected from the world of digital tools and services.

Although physical challenges and skeptical attitudes are among the hurdles to senior adults adopting new technology, once seniors join the online world digital technology often becomes an integral part of their daily lives.

65+ Internet Usage	
<i>Pew Research Internet Project – April 2014</i>	<ul style="list-style-type: none"> • 68% of Americans in their early 70s go online while Internet use and broadband adoption each drop-off dramatically around age 75
<i>Nielsen Norman Group 2012 survey</i>	<ul style="list-style-type: none"> • Users aged 65 and older are 43% slower at using websites than users aged 21-55 • 45% of seniors showed behaviors that indicated they were uncomfortable trying new things or hesitant to explore. • Seniors were almost twice as likely to give up on a task • Seniors blamed themselves 90% of the time when they had computer search problems
Chart 3.5	

As we've seen in our own website trends – where the number of mobile and tablet devices being used to access our sites between 2013 and 2014 spiked 151 percent and mobile Facebook referrals leaped 3,500 percent! – mobile devices and mobile friendly marketing materials must be taken into consideration as we move forward with our communication and special event plans.

65+ Social Media Usage	
<i>Pew Research Internet Project – April 2014</i>	Seniors are more likely to own a tablet or e-book reader than a smartphone and 46% of online seniors use social networking sites
	<ul style="list-style-type: none"> • 18% of seniors own a smartphone
	<ul style="list-style-type: none"> • 27% of seniors own a tablet, e-book reader, or both
	<ul style="list-style-type: none"> • 18% feel comfortable learning to use a new technology device such as a smartphone or tablet on their own
	<ul style="list-style-type: none"> • 77% indicate they would need someone to help walk them through the process
	<ul style="list-style-type: none"> • 56% would need assistance to use social networking sites such as Facebook & Twitter
	<ul style="list-style-type: none"> • 71% go online every day or almost every day
<i>Chart 3.6</i>	

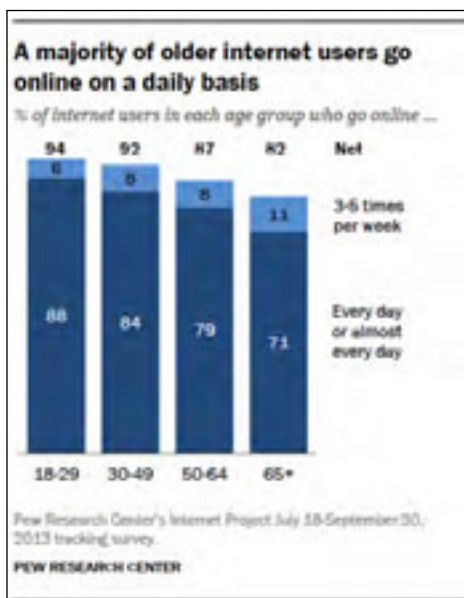
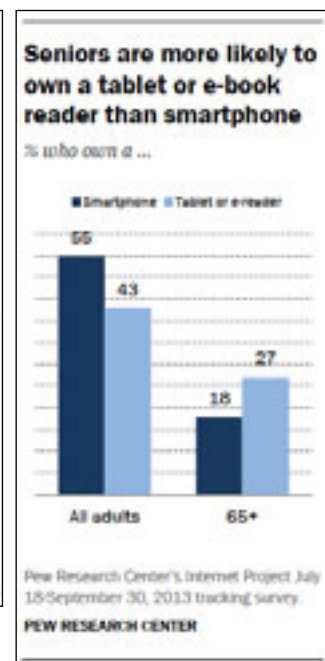
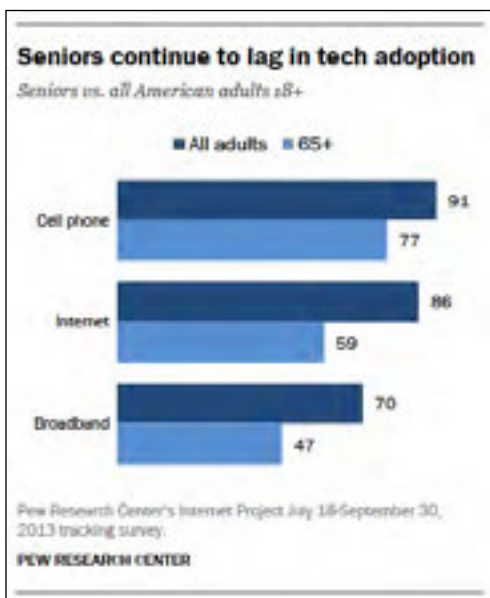


Chart 3.7



Because golf is such an important part of our community, our market survey must also take a look at these trends. It comes as no surprise that the downward trend in golf rounds nationally continues to decline:

Golf Trends	
<i>From National Golf Foundation, July 2012</i>	<ul style="list-style-type: none"> • A golfer is defined as anyone having played an 18-hole round in the last 12 months. Core golfers are defined as people who play eight or more rounds annually; occasional golfers are defined as people who play one to seven rounds annually. • The number of core golfers dipped 4.5%, from 17.3 million to 16.6 million. The number of occasional slipped 1.5%, from 12.2 million to 12.0 million.
	<ul style="list-style-type: none"> • Trends in number of golfers (age 6+): 2000 - 28.8 million 2005 - 30.0 million 2008 - 28.6 million
Chart 3.8	

4.0 The Association

- 4.1 Marketing Plan Goal:** The goal of this document is to develop a comprehensive Marketing Plan that defines this Association’s internal and external marketing goals and creates a realistic set of measurable objectives.
- 4.2 Service Offering:** This Association offers unparalleled amenities and social opportunities for active adults. Specifically, this Plan addresses marketing objectives for promoting the Community as a whole, the Chartered Clubs, and the Bowling and Golf programs. To a lesser extent, it also outlines objectives for promoting technological advancements, library and special events, advertising revenue, and the Village Store.
- 4.3 Positioning:** This Association and many of its amenities are nearly 35 years old and are competing with newer communities offering more state-of-the-art facilities. We have, however, much more to offer with extremely competitive annual dues and fees, and we are debt free. With some promotion, branding and public relations, along with a capital campaign that maintains our amenities at the Sun City West standard, we are well positioned as one of America’s finest active-adult communities.

Degree to Which SCW Residents’ Expectations Were Met				
	Not at all	Somewhat	Met my expectations	Exceeded my expectations
Female boomers	1%	10%	60%	29%
Male boomers	1%	8%	70%	21%
Female non boomers	1%	7%	60%	22%
Male non boomers	1%	9%	67%	22%
Differences not significant. <i>Data from SCW’s 2008 Baby Boomer Study.</i> Chart 4.1				

4.4 SWOT Summary

- 4.4.1 Strengths:** We have among the nation’s lowest annual fees; no debt; adequate reserves; proximity to medical facilities and high-end entertainment opportunities, casinos, Las Vegas, Palm Springs, California beaches, Mexico resort destinations, fine dining, Westgate, Arrowhead Towne Center, Spring Training Facilities, Arizona Cardinals

stadium, Phoenix Suns, FBR Open, PIR NASCAR racing track, Heard Museum, Phoenix Opera, Ballet, Symphony, etc. We are an all-inclusive community (with restaurants, shopping centers, etc.) The new Fry's shopping center shows a rejuvenation of the community, and our plans to update the look and feel of the RH Johnson complex with new paint, signage and landscaping will keep us fresh and competitive. We have a strong reputation among those who know us, and word of mouth is our greatest advertising asset. We have a strong online presence and social media following; and these individuals help promote us to their online friends.

- **Other amenities:** We offer WiFi; private Library and Computer Center; copious entertainment opportunities; seven golf courses (9 total in community); a popular 30-lane bowling center; softball field; 100+ chartered clubs; stand-alone Metal and Woodshop clubs; computer club facilities; lawn bowling; theater facilities; six pools; four state-of-the-art fitness centers; retail store; 21 pickle ball courts; Wii gaming center; Social Hall; ballroom; Lecture Hall; tennis courts; two mini golf courses; on-site restaurant; horseshoes; park with ramadas; performance pavilion; garden railroad; greenhouse; agricultural plots; indoor and outdoor walking track; bocce ball courts; lawn bowling; table tennis; racquetball; children's playground; billiards tables; volleyball; two dog parks; and soon an automobile restoration facility and community radio.

4.4.2 Weaknesses: We have a fixed base of golfers, and our courses, although now public with restrictions, are still seen as private among many nonresidents. . To attract new golfing homeowners, we need to invite them in to play our courses so they can experience the community. Newer communities offer more extensive hiking/biking trails, which is one area we could improve. We also know Boomers are more than twice as likely as their older predecessors to choose an active-adult community that is part of a larger all-ages community; that's not something we can possibly offer – but we can be more grandchild friendly and promote our proximity to the multigenerational areas. We are constrained by Articles of Incorporation; Covenants, Conditions and Restrictions; Bylaws and other Governing Documents that will need modification to further promote the community. We do not have the social gathering opportunities such as lounges, sports-themed facilities, restaurants, etc. Perhaps our biggest weakness, however, is our identity. We are well received by those who know of us through word of mouth, but for those who don't hear about us from a friend or family member, we are often confused with Sun City or Sun City Grand; there is no differentiation. "Sun City" is seen as one big retirement area, not individual communities. As such, our golf courses, our age, and our facilities are confused with other Sun Cities.

4.4.3 Opportunities: Open Play and VIP programs are growing opportunities for exposure. We also have the opportunity to establish and market an image and branding for SCW with the new logo and the RH Johnson facelift. Boomers are reaching retirement age, and there are 1.5 million people 55 and older living in Metropolitan Phoenix. Women are the fastest growing segment in golf. We have flexibility with our seven golf courses. There is an increased willingness by the Governing Board to explore marketing opportunities. The Northwest Valley attracts thousands of visitors a year for professional sporting events (Super Bowl, Spring Training, NASCAR, etc.) and to visit families, etc., and we can market to them. The Kuentz Courtyard is a good example of a cost-effective way to revitalize and old space to make it meaningful and well used for all our generations of

users, and an attractive lure for newcomers. More of these opportunities exist. We already have much of what retiring seniors want, we just need to let them know that we have lifelong learning, WiFi, more than 100 clubs, a debt-free community and more. Because we have seven golf courses, we have an opportunity to experiment with one or two of them; for example converting an executive course to two nine-holes.

4.4.4 Threats: We have aging facilities. We're competing with new active adult communities with brand-new facilities and extensive marketing budgets. We have seven golf courses competing for limited golfers. Some longtime residents are resistant to change, while new residents demand it and our competitors offer it. We need to hit the sweet spot that appeases both. The greatest risk to our community's future is trying to please everyone and ending up doing nothing, in which case we cannot attract those future homeowners who will keep this community sustainable.

4.5 Competition

See chart below for details of Direct Competition.

4.5.1 Direct Competition: Active Adult Community Summary

- **Minimum Age** – Unless otherwise indicated most are 55+.
- **Golf** – #'s include country club; m= membership required ; ex = executive course
- **Tennis** - # of courts; **86%** of those surveyed offer tennis
- **Pickle ball** – # of courts; **56%** surveyed offer pickleball
- **Sport courts** – Includes courts for basketball, bocce ball, shuffleboard, and horseshoe pits
- **Bowling** – Only two on list are SCW & SC
- **Fitness** – All have some kind of fitness facility or exercise room (**100%**)
- **Pool** – All have at least one pool
- **Spa** – Unless specified as DS (Day Spa); listing refers to having hot tubs and/or jacuzzis
- **Arts & Craft Centers** – In some cases includes only one room for all craft projects
- **Billiards** – **63%** offer billiards
- **Club House** – Various types of rooms included similar to RHJ-SH (**100%**)
- **Dining** – Wide variety including elegant, casual, snack bar at golf (**86%**)
- **Lounge** – **33%** (Assume many golf courses serve beer/wine)
- **Library** – (**83%**) have a library
- **WiFi/Computer Club** - **73%** now include Internet facility/access
- **Theater** – includes outdoor amphitheater; only 10 make mention of a theater with permanent seating
- **Pet Park** – only **16%** have dedicated pet facility
- **Walk/Bike/Hike trail** – W = walking; B = biking; H = hiking; **60%** of communities are including some kind of exercise trail in their development.

Conclusions re: Direct Competition

- Our Open Play golf program is doing well and growing, with more than 25 percent of our golf revenue coming from this source now. We need to continue to build it and advertise it to those who continue to think we are public, or who think they have played our courses because they played “Sun City” courses. We need to continue improving customer service so every first time player wants to come back. We should consider relaxing our booking constraints during those time frames when we have a lot of capacity so nonresidents don’t have to wait until five days out to book.
- Bowling is cost intensive to build. There is no real competition for non-residents other than Sun City. This advantage can continue to be promoted to our benefit.
- SCW has 6 indoor and outdoor pools; others, in most cases, don’t have both.
- SCW has more tennis courts than anyone else.
- No one can claim as many clubs as Sun City West, nor do they have the arts and craft facilities. Once automobile restoration and radio are operational, we should promote these heavily as we will be in an elite class with these two added to our offerings.
- Dining/lounge facilities vary widely, and many are attached to the golf courses.
- Formal theaters are almost non-existent. Many do show movies in club rooms.
- Newer developments have higher dues/fees. Sun City West dues/fees are among the lowest. An aggressive campaign to educate SCW residents of our affordability, especially when compared to other communities, would be beneficial and could help reduce future resistance to fee increases. However, we must reduce the urge to promote low dues as our biggest asset, else we risk attracting residents who are only price conscience, which has the long-term effect of making it difficult to raise dues at a responsible level in future years as we need to keep our amenities in tip-top shape.
- Many communities are adding computer and Internet access facilities, i.e., Facebook, Twitter, WiFi, computer clubs etc. Baby Boomers are interested in technology and older residents are increasingly picking it up. We could promote this to our advantage. We continue to add and keep up with the social media trends of our residents, improving our WiFi equipment and increased information distribution via social media venues. We will also have KSCW radio on the air by the end of 2014. We will also provide iPads in the Library this year to help our willing but nervous residents learn how to use tablets so they, too, can use this technology for staying informed and in touch with peers.
- More incoming residents choose bicycling as their sport of choice. The addition of defined bicycle paths/trails within our community would be a marketing advantage.

See Chart 4.2 on next page

COMPARISON OF ACTIVE ADULT COMMUNITIES IN PHOENIX AREA

Community	Min. Age	# of homes	Golf	Tennis	Pickleball	Sport Courts	Bowling	Fitness	Pool	Spa	Art/Crafts	Billiards	Club House	Dining	Lounge	Library	WiFi / computers	Theater	Pet park	Walk/bike/trails	Price Range	Built
Apache Wells - Mesa	55+	1825	1.38h-m	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	below \$100 - mid \$500s	1960-1987	
Arizona Traditions - Surprise	55+	1762	1.38h	4	x	x	x	x	2										B	high \$100s - mid \$300s	1997-2013	
Carra Mesa - Goodyear	55+	1700	1.38h	x	2	x	2	2	2	2	x	x	x	x	x	x	x	x		mid \$1000s - low \$2000s	2010-2014	
Corner Basin by DW - Sun City West	65+	1650	1.38h-m	5	4	x	x	x	x	DS									WB	high \$100s - high \$500s	2003-2007	
Dreamland Villa - Mesa	55+	2732	1.5h	x	x	x	x	3											WH	below \$100 - high \$100s	1959-1978	
Empire of the Sun - Mesa	55+	2296	1.38h-m	x	x	x	x	3												below \$100 - mid \$200s	1975-1987	
Leisure World - Mesa	45+	2564	2.38h	6	x	x	x	3	x	x	x	x	x	x	x	x	x	x	WB	below \$100 - high \$400s	1971-1994	
Pebble Creek - Goodyear	40+	6700	2.38h	12	8	x	2	5	x	x	x	x	4	2	2	x	x	x		high \$1000s - mid \$600s	1994-2014	
Pueblo El Mirage - El Mirage	55+		1.18h	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x		below \$100 - mid \$100s		
Elis Verde - Phoenix	55+	980	2.38h-m	6	x	x	x	x	2										WB	low \$200s - low \$150s	1975-2010	
Solera by DW - Chandler	55+	1149	1.38h	4	2	x	x	2											WB	high \$100s - high \$500s	2001-2005	
Solera at Johnson Ranch - Queen Creek	55+	772	1.38h	4	x	x	x	x	1										WB	mid \$1000s - low \$300s	2004-2008	
Springfield - Chandler	55+	742	1.18h/1.5h	2	x	x	x	x	x	x	x	x	x	x	x	x	x	x		mid \$1000s - low \$100s	1996-2000	
Sun City - Sun City	55+	24,000	1.18h-1.5h	x	x	x	2	7	10	5	x	x	7	x	x	2	x	2	WB	below \$100 - low \$600s	1960-1978	
Sun City Anthem by DW - Florence	55+	4200	1.38h	8	x	x	x	x	x	x	x	x	2	x	x	x	x	x	WB	mid \$100s - low \$400s	2006-2014	
Sun City Festival by DW - Buckeye	45+	7200	1.38h	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x		high \$100s - high \$600s	2006-2014	
Sun City Grand by DW - Surprise	45+	9002	4.38h	x	x	x	2	4	DS				4	x	x	x	x	x	WB	low \$100s - mid \$400s	1996-2005	
Sun City West by DW - SOV	55+	16,500	9.38h	24	38	x	3	4	4	x	x	x	x	x	x	x	x	x	W	below \$100 - low \$600s	1978-1997	
Sun Lakes Arizona - Sun Lakes	40+	6,681	4.18h/3.9h	7	x	x	x	x	x	x	x	x	5	x	x	x	x	x	WB	below \$100 - high \$500s	1977-2006	
Sun Village - Surprise	55+	1382	1.38h	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x		Below \$100 - High \$200s	1985-1996	
Sunbird - Chandler	55+	1631	1.38h	4	x	x	x	x	x	x	x	x	x	x	x	x	x	x		below \$100 - mid \$100s	1985-1990	
Sundance - Buckeye	45+	1102	1.38h	2	6	x	x	2											WB	mid \$100s - mid \$500s	2007-2014	
Sunland Springs Village - Mesa	55+	3390	2.78h/1.5h	6	x	x	x	2											WB	mid \$100s - high \$400s	1997-2014	
Sunland Village East - Mesa	55+	2437	1.38h	6	x	x	x	2					2	x	x	x	x	WB	below \$100 - low \$300s	1984-1994		
Tonto Verde - Rio Verde	55+	613	2.38h	6				x					x	x	x	x	x	WB	high \$200s - low \$150s	1997-2009		
Trilogy at Encantada - Queen Creek	55+	2400	1.38h-m	4	x	x	x	2	DS				x	x	x	x	x	x		high \$100s - Mid \$600s	2008-2014	
Trilogy at Power Ranch - Gilbert	55+	2025	1.18 h	4				x	2				x	x	x	x	x	WB	high \$100s - low \$600s	1999-2008		
Trilogy at Vista Verde - Peoria	55+	2450	1.38h	4				x	DS				x	x	x	x	x	WB	high \$100s - low \$800s	2004-2014		
Venansia Lakes - Peoria	55+	1701		x	x	x	x	4	2				x	x	x	x	x	WB	low \$100s - high \$200s	1986-2002		
Westbrook Village - Peoria	40+	3919	2.38h	x	x	x	x	x	2				x	x	x	x	x			mid 100s - low \$400s	1982-1993	

KEY: x = amenity exists, number underlined, golf = # of 18 hole or 9 hole courses, "m" means membership required, DS = Day Spa, SB = biking trails, H = hiking trails, W = walking trails

Chart 4.0.2

4.5.2 Indirect Competition: Non-Age Restricted Communities and Golf Courses

- **Residential**

Multi-age communities in Maricopa County are competing for Baby Boomers just as we are. A major new one that is looking to lure Boomers by appealing to their self-image as game-changers and social leaders is Victory at Verrado. We will need to keep an eye on this model to see if it is successful and requires adjustments in our own philosophies. The community certainly has the imagery and attitude to appeal to this generation, but as we've seen time and time again, very few communities can compete with our sheer number of amenities and activities. So again, one of the focuses this year in our marketing plan is on logo, image and branding.

According to research into Boomer migration patterns, Boomers are not moving to the south as much as they did in the past. With Del Webb communities in such varied locations as Illinois, Colorado and Michigan, Boomers can live in an active adult community without moving thousands of miles from family, friends and social contacts with whom they are comfortable.

Boomers are looking to downsize in the home and forego yard work. Builders are creating homes with less square footage, high ceilings, screened porches, double sinks, and jacuzzi-style soaking tubs. Kitchens are not as important because Boomers dine out more than their predecessors. Laundry facilities are tucked away, out of site. Space utilization is key in a smaller house, with enough for hobbies. Hallways are wider, not for wheelchairs, but for walking bikes into the house.

New age-restricted communities offer high-quality fitness centers, hiking and biking trails. Swimming is important, as well as community clubhouses and public spaces.

"The most successful arrangements provide game and party rooms and lounges with space for private reservations and entertaining larger groups of guests. But again, this generation is not their father's retirement set. They don't want bingo and tea socials planned for them - but they want usable common space to host receptions or conduct group meetings," one article states.

Another article explains, "Of Baby Boomers who are considering purchasing a home in an age-qualified active adult community, 30% prefer an urban location; 29% a community that maximizes local natural benefits; 22% like an active adult community located within a multi-generational development; 6% want a small to mid-sized community with golf; 5% choose a country-club setting and **3% prefer a large community with golf.**"

Boomers are more than twice as likely as those 59-70 to choose an active adult community that is part of a multi-aged community. Another statistic shows 40% of Boomers anticipate that their adult children will move back in with them, while 30% anticipate their parents will move in with them.

Some of the Del Webb communities offer interesting activities. Fitness activities of interest to Boomers include tai chi, yoga and Pilates. More adventuresome activities include skydiving, white water rafting, hot air ballooning, sports flying, hang gliding and parachuting. Most of the fitness activities are being done in the early morning or afternoon as the Boomers are still working. As for passive recreation, media technology, ceramics, pottery, wood crafting, stained glass, painting and drawing and knitting are at

the top of the list. In the media technology area, computer, photography, computer graphics, desktop publishing and television/cable programming are of interest.

- **Golf**

Nationally, Del Webb still ranks golf very popular with 40% of residents in Del Webb communities playing seasonal golf at least one time per week and nearly 65% playing occasionally. 36% indicated they never play golf. This compares to 12.3% golfer participation for the same age groups in the general population. Golfers in Del Webb communities play an average of 103 rounds per year in the Sun Belt and 54 rounds per year in four-season climates.

The West Valley is a destination area for golfers, as evidenced by the number of courses here. We fall in the middle of the West Valley competition in terms of home prices and golf rates.

Area	Number of courses
Arizona	322
West Central AZ	216
Northwest Valley	26
<i>Chart 4.3</i>	

In Maricopa County, most of the new communities offer many recreational activities including golf. The rates for golf vary widely. We ensure through our annual budgeting process that our Open Play rates are very competitive as this is an important source of revenue.

- **Bowling**

There are relatively few bowling centers in the Valley, and really only two other (Sun City) that serves as our competition for outside play. Uptown Alley is relatively new in Surprise, and Brunswick has lanes in Avondale, Glendale and Phoenix, but they appear to cater mostly to a younger crowd.

5.0 Marketing Strategy

Our marketing strategy is two-pronged: those items that staff will tackle, such as specific programs and marketing efforts; and those items the Governing Board will pursue, such as setting rates, developing policies and changing Bylaws as necessary to accomplish goals.

6.0 Advertising

6.1 Locally, our advertising efforts do not have to be costly. The 2008 SCW Boomer Study shows most residents receive their information through word of mouth and either our own literature/ads, or the Visitors Center. Very few get their information from paid ads.

Sources of Information					
Sources of Information	Boomers		Non boomers		Are differences Significant
	Female	Male	Female	Male	
Family	42%	33%	26%	32%	Yes
Friends	36%	35%	42%	39%	No
RCSW website	8%	12%	4%	3%	Yes
SCW literature	20%	11%	14%	17%	No
Newspapers/magazines	5%	3%	10%	10%	Yes
Advertisements	2%	1%	7%	9%	Yes
Visitor Center	21%	24%	20%	26%	No
Visited SCW before decision	58%	66%	77%	68%	Yes
Considered other retirement communities	55%	64%	54%	63%	No
<i>Chart 6.1</i>					

6.2 Nationally, efforts to attract golfing residents to SCW will be costly, as advertising in national publications can run into the thousands of dollars. Still, this expense pays off not only through APF fees, but additional golf revenues from these future residents. Advertising dollars should be directed at golfers, not just any 55+ residents; we need to fill homes with residents who participate in revenue-generating activities. Our past effort at advertising a golf image in Military Officers Magazine resulted in a 75 percent increase in unique visits to a specific webpage for these visitors; while not a large raw number, it is significant and trackable.

6.3 Website Marketing: The Association's websites are perhaps our most economical and most easily controlled marketing avenues. Vast improvements already have been made to make them visually appealing, information packed and easily searchable. More use of video material will attract potential residents to the community.

6.4 Plan Philosophy: It's important to note that the programs offered through this plan were developed by a broad-based staff team. More than a dozen individuals from all areas of the Association provided input. This plan offers a significant variety and number of programs in order to provide a slate of possibilities:

6.5 Program Recommendations:

6.5.1 Golf

- Plan Pro Shop sales around major holidays/golf events (including pro golf events)
- Take existing events in SCW and tie golf events into it – multi sport local competitions
- Skills challenges with Reid-West
- Junior Summer program with kids
- Adopt a high school golf program
- Grandview Open House
- Celebration of Golf
- Michelob Challenge
- League development through Chamber of Commerce
- Spring Training tie-ins
- Launch Public Golf Portal
- LPGA Legends 2015
- Merchandise sales w/ email blasts
- Loyalty program expansion
- Vietnam Vets Tournament
- Investigate hosting Itty Bitty Open with JGA
- Investigate Spring Break, Christmas and summer weekly programs

6.5.2 Bowling

- Better promote Sports Pavilion offerings (including on website)
- Market leagues online and on eNews for last-minute signups
- More tournaments (sponsored by companies)
- Special events (Mel's Madness)
- Senior PBA Tour – Lona King Realty
- Vietnam Vets Tournament
- More corporate sponsorships
- Year-round ads on bowling walls/monitors
- Promote and expand Wii bowling (expand beyond SCW)
- Explore intercommunity bowling tournaments
- Promote Memo's Bistro
- Work with Memo's to offer more bowler/lane friendly food and service
- Promote Your Strike Shop
- Promote Coaching Program
- Launch happy hours at Shuffleboard Lounge Fridays and Saturdays
- Continue the Sunday specials
- \$1 lanes etc.

6.5.3 Recreation

- Look at new poster printing options
- Investigate more intergenerational (high school) partnering opportunities
- Investigate Spring Break/Christmas summer/weekly program
- Create fitness brochure to define what equipment is at each center
- Highlight the special equipment at each center
- Create plant identification brochure at Beardsley Park
- Promote the Explore! Program more
- Add online subscriptions to series events
- Promote emailed events to online subscribers (Arts People and Explore!)
- Promote Visitors Center VIP program
- Promote Chartered Clubs
- Work with clubs on promoting high-traffic events
- Promotion of special events
- Adjust hours of operation to meet needs of working residents
- Introduce group e-fitness (promote online; tie in to FB)
- Investigate activity trackers – award top fitness residents
- Promote Daily Fitness personal training program
- Review Space Utilization Study with Governing Board and re-exam Club Moratorium
- Promote UV Filtration systems at PR and Beardsley
- Promote renovation of Beardsley pool deck and restrooms
- Create geotracking event
- Look into augmented reality game (IT recreation apps)
- Create and promote biking trails
- Define RHJ renovation and architectural plan and promote
- Create hiking/walking trail at RHJ
- Open discussions with Fry's on sponsorships/events/etc

6.5.4 Community

- Look at possibility of redesigning New Member Packet
- Create community trifold
- Complete and distribute survey of 45-50 year olds in Maricopa County on what they want in a retirement community
- Explore keeping rec card numbers for residents no matter if they move within SCW to better track
- Cross-promote various divisions
- Distribute cards promoting rec tours/web/apps/VIP/etc.
- Budget more money for community marketing
- Create/sell SCW logoed merchandise
- Set date to phase out old staff shirts with old logos
- Look at improving SCW signage
- Place ads in active-adult appropriate magazines
- Talk to American Legion about putting banners on some of their flag poles (new logo)
- Create TORCH promotional video.

6.5.5 Library

- Develop more meaningful volunteer opportunities
- Promote technology/bring seniors up to speed
- Promote information literacy
- Better promote the library overall – March 2015 Open House
- Holiday children’s story times
- Book signings and author visits
- Promote local authors
- Summer puzzle
- Promote chess clubs, book clubs, Scrabble – etc.
- Promote the library as a community center
- Summer reading program
- Investigate intergenerational technology training (“the Teenager Is In!”)
- Investigate graduate school visitation/shadowing
- Better promote homebound
- Better promote book sales
- Discontinue Tuesday night late hours
- Promote residents tying VIP card to Friends of the Library

6.5.6 Technology

- Introduce keychain rec cards
- Promote Facebook for clubs/residents
- Promote Pinterest with our clubs
- Keep up with social media trends
- Offer more technology classes for residents through Library and Explore!
- Investigate mobile apps
- Expand WiFi to Beardsley Park.

6.5.7 Village Store

- Continue paid ads for fairs
- Work with Model Railroad to tie in to their special events (gifts for kids who attend Christmas event, i.e.)
- Hand out Sun City West logoed merchandise to visitors
- Promote Village Store at high traffic events (Pickleball tourney, Quilt show etc.)
- Promote UPS discount for Village Store shipments
- Do more email promotions of store
- Continue investigation of Village Store POS.

7.0 Marketing Expense Budget: \$6,000 set aside in FY 2014-15 for community marketing/advertising; \$55,100 for golf marketing.

8.0 Staff Goals: Staff members’ annual goals will include projects that fall under their purview for that rating period to ensure follow-through and accountability.