

DEL E. WEBB
DEVELOPMENT COMPANY

SUN CITY WEST
RESIDENT / VISITOR STUDY

VOLUME I:

Summary Report

MAY, 1983

prepared for

Del E. Webb
Development Company
Bell Professional Building - South
17220 Boswell Boulevard
Sun City West, Arizona

prepared by

Behavior Research Center, Inc.
Phoenix, Arizona

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INTRODUCTION

This study was commissioned by the Del E. Webb Development Company. The primary purpose of this project was to determine the attitudes and opinions of three distinct groups towards Sun City West. The three groups studied were:

- A. Residents: Current residents of Sun City West
- B. Recent Purchasers: Individuals who purchased property at Sun City West between January 1, 1983 and March 31, 1983.
- C. Recent Visitors: Individuals who visited Sun City West between January 1, 1983 and March 31, 1983.

The information contained in this report is based on a total of 593 telephone interviews conducted between May 9 and 16, 1983. Two hundred and ninety (290) interviews were conducted with Sun City West residents while 183 interviews and 120 interviews were conducted with recent visitors and purchasers, respectively.

Respondents for the resident segment of this study were selected via a directory sampling methodology. Using this methodology, telephone numbers were systematically selected from the 1983 Sun City West Homeowner's Directory in a random manner. Respondents for the purchaser and visitor surveys were randomly selected from lists provided by the Del E. Webb Development Company. Residents of Metropolitan Phoenix were not included in these samples.

All of the interviewing on this study was conducted by professional interviewers of the Behavior Research Center, at the Center's central location interviewing facility in Phoenix, Arizona. All of the interviewers who worked on this project were under the direct supervision of BRC supervisory personnel 100 percent of the time.

The Behavior Research Center has provided all of the data germane to the basic research objectives of the project. However, if the Del E. Webb Development Company requires further data retrieval or analysis, we stand ready to provide such input.

Behavior Research Center

OVERVIEW

- * The "average" Sun City West resident is 65.5 years old, was employed in a white collar occupation, lives full-time in Sun City West, and has lived 2.9 years in the community.
- * The "average" Sun City West recent purchaser or visitor is slightly younger than the average resident (63.3 years), also employed in a white collar occupation, and is currently a resident of the North Central region of the country (60%).
- * Most recent purchasers (71%) first became aware of Sun City West through friends or relatives -- 67 percent of whom are themselves Sun City West residents. Over 90 percent of Sun City West residents say they actively promote the community to their friends and relatives -- 47 percent of whom say their efforts have played an important part in convincing some of them to move to Sun City West.
- * Fifty-eight percent (58%) of recent purchasers and 76 percent of recent visitors recalled seeing either home town or local (Phoenix area) advertising for Sun City West. Visitors are far more likely than purchasers (45% vs 8%) to have seen local advertising for the vacation special package while purchasers are more likely to have seen the local advertising.
- * Billboards were noted as the major source of local advertising (63%) among both visitors and purchasers, followed by newspapers (32%). Newspapers were sighted far more frequently (41% vs. 26%) by purchasers than visitors.
- * Twenty-eight percent (28%) of all purchasers and 50 percent of all visitors said advertising played a role in their decision to visit Sun City West.
- * Thirty-eight percent (38%) of purchasers and 88 percent of visitors made use of the vacation special package with the typical purchaser user making 1.7 visits prior to buying. Thirty percent of all purchasers and 62 percent of all visitors said the vacation special package played a major role in their decision to visit Sun City West.
- * Thirty-eight percent (38%) of visitors and purchasers combined visited other Arizona retirement communities while 48 percent visited retirement communities in other states. Florida and California were the most frequently visited states.

- * Sun City West received a very positive overall rating by each respondent group (resident / purchaser / visitor). The recreational facilities were ranked as the feature "liked most" about the community by each group. The one area receiving the most negative comments was the lack of or need for more retail shopping facilities.
- * Thirty-two percent of residents and 58 percent of recent purchasers indicated they considered buying a Sun City resale home but did not, either because of the price of Sun City homes or because they preferred the newness of or housing styles / types available in the Sun City West area.
- * The Phoenix area climate and the variety of recreational facilities were the most frequently mentioned factors residents and recent purchasers gave for purchasing a home at Sun City West. Also receiving frequent mentions was the retirement lifestyle, the close proximity of friends and relatives, and the price.
- * Two percent of recent visitors have already purchased a retirement home while 26 percent plan on doing so in the future. In addition, 43 percent are not sure if they will purchase one while 30 percent definitely will not. Among those visitors who plan on buying a retirement home, 49 percent will buy it at Sun City West.
- * Eighty-seven percent of Sun City West residents feel the area needs additional retail businesses while 43 percent feel it needs additional professional service businesses, 37 percent additional outdoor recreation facilities and 33 percent additional indoor recreation facilities. The most frequently called for facilities in each area were:
 - Retail: Grocery stores (40%), department stores (36%), hardware stores (35%), restaurants (32%)
 - Professional Services: Doctors (70%), dentists (49%), lawyers (29%)
 - Outdoor Recreation: golf courses (42%), swimming pool (32%)
 - Indoor Recreation: Indoor pool (66%)
- * Ninety percent of Sun City West residents attended an event at the Sundome during the past year with the average resident attending 10.9 events per year. The Sundome received a very positive overall rating from residents.

- * Sun City West residents are very much against allowing other builders into the community (65% negative), building pre-fabricated housing (59% negative), or building a 3-story apartment near Hillcrest golf course (58% negative). Their reactions to building a first class resort hotel are far less negative (45% positive / 29% negative) while their reaction to Webb's acquisition of Boswell's shares is basically positive to neutral.

- * Sixty-two percent of Sun City West residents own a General Motors automobile.

SUMMARY OF THE FINDINGS

A. Respondent Profile

The average Sun City West resident is 65.5 years of age, was employed in a white collar occupation, lives full-time in Sun City West and has lived in the community for approximately 2.9 years. As might be expected, recent purchasers and recent visitors are slightly younger than current residents with average ages of 63.4 years and 63.2 years, respectively and have occupational profiles very similar to current residents.

Recent purchasers are also a far more likely (34% vs 7%) than current residents to use their Sun City West dwelling as a secondary residence. It may also be seen in the table that six out of ten purchasers and visitors currently reside in the North Central region of the country.

RESPONDENT PROFILE

<u>Age</u>	<u>Resident</u>	<u>Purchaser</u>	<u>Visitor</u>
Under 55	2%	4%	8%
55 to 59	11	18	20
60 to 64	32	35	29
65 to 69	36	35	31
70 or over	<u>19</u>	<u>8</u>	<u>12</u>
	100%	100%	100%
MEAN AGE	65.5	63.4	63.2
<u>Employment Status</u>			
Employed	6%	31%	33%
Semi-Retired	9	15	16
Fully Retired	85	53	50
Refused	*	<u>1</u>	<u>1</u>
	100%	100%	100%
<u>Occupation (Current/Former)</u>			
Professional/Technical	29%	33%	30%
Business/Manager/Owner	35	29	29
Sales	11	13	14
Clerical	3	2	3
Service	4	6	3
Blue Collar	16	13	12
Refused	<u>2</u>	<u>0</u>	<u>9</u>
	100%	100%	100%

* Indicates * .5

RESPONDENT PROFILE (CONTINUED)

<u>Use of Sun City Residence</u>	<u>Resident</u>	<u>Purchaser</u>	<u>Visitor</u>
Primary Residence	93%	58%	
Secondary Residence	7	34	N/A
Investment	0	3	
Not Sure	0	5	
	100%	100%	
<u>Months Per Year Live (Plan to Live) at Sun City West</u>			
Under 4	1%	8%	
4 to 6	5	26	
7 to 9	13	14	N/A
10 or More	80	44	
Not Sure	1	8	
	100%	100%	
<u>When Planning to Move to Sun City West</u>			
Within 6 Months		52%	
7 to 12 Months		29	
Over 1 Year	N/A	4	N/A
Not Sure		15	
		100%	
<u>Length of Residence in Sun City West</u>			
Under 1 Year	5%		
1 Year	8		
2 Years	20	N/A	N/A
3 Years	33		
4 Years	29		
5 Years	5		
	100%		
<u>Current Region of Residence</u>			
North Central		59%	63%
Pacific		15	13
Northeast	N/A	10	7
Mountain		9	11
South		5	5
Canada		2	1
		100%	100%
 (BASE)	 (290)	 (120)	 (183)

B. Awareness of Sun City West

Recent purchasers and visitors were asked how they first became aware of Sun City West. As may be seen in the next table, among purchasers, friends and relatives were the key introductory source while among visitors, Sun City West advertising played the largest role. Further, among both groups, 67 percent of the friends or relatives that informed the respondents of Sun City West were themselves Sun City West residents.

"How did you first become aware of Sun City West?"
(Summary Q.1 and Q1a)

	<u>Total</u>	<u>Purchaser</u>	<u>Visitor</u>
Friends or Relatives	56%	71%	46%
Advertising	35	16	48
Just drove by it	3	5	2
Sun City resident	1	2	0
Don't Recall	5	6	4
	<u>100%</u>	<u>100%</u>	<u>100%</u>
(BASE)	(303)	(120)	(183)

C. Advertising Awareness/Recall

Over two-thirds (69%) of total recent purchasers and visitors recalled having seen advertising for Sun City West either in their home town or locally. Local advertising outpaced home town advertising among both purchasers and visitors, however, local advertising was far more dominant versus home town advertising among purchasers. Thus, as may be seen, among purchasers local advertising received a reading of 53 percent versus eight percent for home town advertising while the readings among visitors were 49 percent and 45 percent, respectively.

Advertising Awareness Summary

	<u>Total</u>	<u>Purchaser</u>	<u>Visitor</u>
Saw Home Town Advertisements	30%	8%	45%
Saw Any Local Advertisements	50	53	49
Saw Any Advertisements	69	58	76

Billboards were mentioned as the primary source of local advertising with a combined reading of 63 percent followed by newspapers with a reading of 32 percent. In addition, newspaper advertising received a much larger reading among purchasers (41%) than among visitors (26%)

Source - Local Advertising

	<u>Total</u>	<u>Purchaser</u>	<u>Visitor</u>
Billboard	63%	48%	73%
Newspaper	32	41	26
Television	3	6	0
Magazine	2	3	1
Circular	1	2	1
Don't Recall	5	6	2
	106%	106%	103%
(BASE)	(153)	(64)	(89)

Totals exceed 100% due to multiple answers

Among recent purchasers, the virtues of retirement living and the home prices were the primary advertising messages recalled from the local advertising. The Sun City West and Del E. Webb names and a general description of Sun City West were the primary messages recalled by the recent visitors. In addition, over 50 percent of recent purchasers and nearly 40 percent of recent visitors could not recall any advertising message. While this volume may seem quite high it is not unusual given the age of the audience and the time which has passed since they first viewed the advertising.

Message Recall - Local Advertising

	<u>Total</u>	<u>Purchaser</u>	<u>Visitor</u>
Virtues of Retirement Living	16%	17%	16%
Del E. Webb/Sun City West Name ID	16	9	20
Homes Types / Model	12	14	11
General Description of Sun City West	12	5	17
Home Prices	11	17	7
Recreation Facilities	7	3	9
Directions / Location	5	3	7
Vacation Special	5	3	6
Invitation to Visit	4	3	4
Sundome	1	0	1
Don't Recall	44	52	39
	<u>133%</u>	<u>126%</u>	<u>137%</u>
(BASE)	(153)	(64)	(89)

Totals exceed 100% due to multiple answers

Among the viewers of the home town advertisement the possibility of a one or two week vacation (53%) and the price of the vacation special (35%) were the primary messages recalled.

Message Recall - Home Town Advertising

	<u>Total</u>	<u>Purchaser</u>	<u>Visitor</u>
One / Two week Vacation	53%	40%	55%
Price Mention (Vacation Special)	35	20	37
Golf / Free Round of Golf	19	10	20
Retirement Community	13	30	11
Toll Free Number / Information Address	10	20	9
Apartments / Townhouses	9	0	10
General Description of Sun City West	9	20	7
Recreation Facilities	7	0	7
Climate / Weather	3	0	4
Don't Recall	10	10	10
	<u>168%</u>	<u>150%</u>	<u>170%</u>
(BASE)	(92)	(10)	(82)

* Totals exceed 100% due to multiple answers

Those respondents who saw any Sun City West advertising were asked whether the advertising they saw played any role in their decision to visit Sun City West. As the following table reveals, 48 percent of the purchasers and 65 percent of the visitors said the advertising played a role in their decision.

Role of Advertising in Decision
To Visit Sun City West

	<u>Total</u>	<u>Purchaser</u>	<u>Visitor</u>
Major	37%	21%	44%
Minor	23	27	21
None	36	43	33
Don't Know	4	9	2
	<u>100%</u>	<u>100%</u>	<u>100%</u>
(BASE)	(210)	(70)	(140)

Those respondents who said the advertising played a role in their decision were next asked which factors mentioned in the advertising caught their attention the most. As the accompanying table indicates, prices, either for the homes or the vacation special received the greatest mention from purchasers while golf and the vacation special prices received the greatest mention from visitors.

"Which of the various factors mentioned in the advertisement caught your attention the most?"
(Among respondents who said ads played major/
minor role)

	<u>Total</u>	<u>Purchaser</u>	<u>Visitor</u>
Prices / Rates of Vacation Special	20%	15%	23%
Golf	19	6	24
Recreational Facilities	14	12	15
Opportunity to Take One/Two Week Vacation	11	0	16
Retirement Lifestyle	10	12	9
Home Prices	8	15	6
Climate / Weather	3	0	5
Variety of Activities	2	6	1
The Homes	2	3	2
Toll Free Number / Information Address	1	0	1
Not Sure	20	38	12
	<u>110%</u>	<u>107%</u>	<u>114%</u>
(BASE)	(125)	(34)	(91)

Totals exceed 100% due to multiple answers

D. Vacation Special

Recent purchasers and visitors were asked a series of questions to determine their use of the vacation special package offered by Sun City West. As the following series of tables reveals, nearly nine out of ten recent visitors made use of the vacation special package while 38 percent of recent purchasers did so. However, those recent purchasers who used the vacation special did so (1.7 times) far more frequently than recent visitors (1.2 times).

It is also evident from the tables that the vacation special played a significant role in purchasers and visitors decisions to visit Sun City West and that advertising was the primary source of visitors introduction to the package while word of mouth played a significant role among purchasers. Overall, nearly two out of three purchasers and three out of four visitors saw advertising for the vacation special package.

<u>Ever Used Vacation Special</u>	<u>Total</u>	<u>Purchaser</u>	<u>Visitor</u>
Yes	68%	38%	88%
No	32	62	12
	<u>100%</u>	<u>100%</u>	<u>100%</u>
(BASE)	(303)	(120)	(183)

Among Respondents Using Vacation Special

<u>Role in Decision to Visit</u>			
Major	68%	62%	70%
Minor	22	27	21
None	8	7	8
Don't Know	2	4	1
	<u>100%</u>	<u>100%</u>	<u>100%</u>
<u>Number of Times Vacation Special Used</u>			
One	75%	53%	81%
Two	20	38	15
Three or More	5	9	4
	<u>100%</u>	<u>100%</u>	<u>100%</u>
(MEAN)	1.3	1.7	1.2

Source of Introduction
To Vacation Special

	Total	Purchaser	Visitor
Friends / Relatives	35%	42%	33%
Magazine Ad	27	16	30
Newspaper Ad	54% - 24	40% - 20	58% - 25
Direct Mail Ad	3	4	3
Visit to Property	4	7	3
Other	3	4	2
Don't Recall	4	7	4
	<u>100%</u>	<u>100%</u>	<u>100%</u>

Saw Advertising For Vacation
Special (Summary)

Yes	73%	62%	76%
No / Don't Recall	27	38	24
	<u>100%</u>	<u>100%</u>	<u>100%</u>

(BASE)

(206)

(45)

(161)

E. Visits to Other Retirement Communities

Over 50 percent of recent purchasers and 38 percent of current residents visited other Arizona retirement communities prior to purchasing their Sun City West homes. Among recent visitors the figure was 33 percent. Similarly, nearly half of current residents and recent purchasers visited retirement communities in other states while 38 percent of recent visitors have done so to date. Florida, California and Arkansas were the staes most frequently visited.

	<u>Resident</u>	<u>Purchaser</u>	<u>Visitor</u>
<u>Visited Other Arizona Retirement Communities</u>			
Yes	38%	51%	33%
No	62	48	67
Don't Recall	0	1	*
	100%	100%	100%
 <u>Other Arizona Communities Visited</u>			
Green Valley	48%	34%	50%
Leisure World	44	37	15
Sun Lakes	22	29	17
Sunland Village	11	16	8
All Others	16	24	39
Don't Recall Name	4	11	7
 <u>Visited Retirement Communities In Other States</u>			
Yes	48%	48%	38%
No	52	51	61
Don't Recall	0	1	1
	100%	100%	100%
 <u>Other States Visited</u>			
Florida	54%	39%	51%
California	41	49	19
Arkansas	13	17	20
Texas	11	9	4
All Others	36	32	24
(BASE)	(290)	(120)	(183)

* Indicates % \neq .5

F. Evaluation of Sun City West

Each class of respondent was asked to evaluate Sun City West on 20 specific variables. As can be seen, Sun City West was rated quite high in most areas with the exception of the availability of shopping and medical facilities. Visitors tended to give the highest overall ratings while residents the lowest.

"On a scale of 1 to 10, where 1 is the most negative response and 10 the most positive, how would you rate Sun City West on..."

	<u>Mean (Average) Rating</u>		
	<u>Resi-</u> <u>dents</u>	<u>Pur-</u> <u>chasers</u>	<u>Vis-</u> <u>itors</u>
Overall appearance of Neighborhoods	9.3	9.1	9.4
SCW Compared to other retirement communities visited	9.3	9.0	8.6
Variety of outdoor recreational facilities	8.9	9.1	9.1
Landscaping of neighborhoods	8.8	8.7	8.9
Variety of indoor recreational facilities	8.7	8.9	8.9
Appearance of homes	8.7	8.7	8.7
Variety of cultural activities in area	8.4	8.8	8.7
Image of Webb Company as quality developer	8.3	8.5	8.9
Variety of features offered in homes	8.2	7.8	8.3
Variety of housing styles available	8.0	7.8	8.1
Value for the dollar of the homes	8.0	8.2	7.7
Availability of religious facilities in the area	8.0	8.1	8.7
Prices of the homes	7.9	8.0	7.6
Variety of floor plans available	7.8	7.5	8.0
Energy saving qualities of the homes	7.8	7.8	7.8
Layout of the streets	7.7	8.5	8.7
Variety of financing alternatives available	7.5	7.3	7.6
Quality of home construction	7.4	7.7	8.1
Availability of medical facilities	6.6	7.3	8.1
Availability of shopping facilities	5.9	6.9	7.6
(BASE)	(290)	(120)	(183)

In a related question, respondents were asked to indicate what they "liked most" and "liked least" about Sun City West. The recreational facilities at Sun City West received the most positive response among each respondent group. Among purchasers and visitors the physical appearance of the community was the second most frequently mentioned response while among current residents the people of Sun City West rated highly.

"Liked Most" About Sun City West

	<u>Resident</u>	<u>Purchaser</u>	<u>Visitor</u>
Recreational Facilities	43%	59%	62%
The People/Neighbors	35	27	11
Retirement Lifestyle	29	20	15
Climate/Weather	29	23	26
Physical Appearance	28	45	48
Security/Safety	5	7	2
Sundome	4	8	9
Location	3	7	2
The Homes	3	13	18
All Other Mentions	5	16	12
Everything - Not Specific	17	3	7
Nothing	5	*	*
(BASE)	(290)	(120)	(183)

* Indicates % \leq .5

Totals exceed 100% due to multiple mentions.

On the other side of the coin, the weather received the most negative comments among residents and purchasers while the retirement lifestyle received the most among visitors. Of particular interest in the next table, however, is the high volume of respondents who stated there was nothing they disliked about the community.

"Like Least" About Sun City West

	<u>Resident</u>	<u>Purchaser</u>	<u>Visitor</u>
Climate/Weather	18%	8%	8%
Lack of Shopping Facilities	13	6	4
Retirement Life Style	8	3	16
The People	7	*	3
Webb's Efforts to Turn SCW Into a Resort Development	6	2	0
Physical Appearance	6	3	3
Lack of Restaurants	4	3	6
Distance from Family & Friends	4	*	5
High Utility Bills	3	*	0
Crowded Facilities	3	3	5
Transportation Problems	2	0	1
The Homes	2	3	2
Loose Dogs/Pets	2	0	0
Home Prices	1	2	3
Too Sterile/Organized	0	2	6
All Others	7	3	3
Not Sure	3	6	1
Nothing - Like Everything	29	60	44
(BASE)	(290)	(120)	(183)

* Indicates % \leq .5

Totals exceed 100% due to multiple answers

Next, in this section, residents and visitors were asked what could be done to Sun City West to make it a better place to live. By nearly a two to one margin the need for additional shopping facilities was the primary concern among current residents. In addition, 12 percent of residents also stated the desire to have Sun City West maintained as a retirement community, not as a resort.

"What Could be Done to Make Sun City West a Better Place to Live?"

	<u>Resident</u>	<u>Visitor</u>
Nothing Needed/Everything Fine	<u>33%</u>	<u>49%</u>
More Shopping Malls/Stores	23	8
Maintain as Retirement Community, Not a Resort	12	0
Less Crowded Facilities/Activities	12	2
Better Landscaping/Too Barren	10	2
More Restaurants	8	7
More Public Golf Courses	7	1
Higher Quality Homes	6	3
More Varied Age Mixture	3	6
Better Transportation/Bus/Cab	3	1
More Medical Facilities	3	1
Keep Kids Out	2	0
Lower Home Prices	*	3
More Social Life	1	2
More Grocery Stores	1	2
Wider Variety of Home Styles	2	2
More Coin-op Laundries	*	2
Get Rid of Fences/Walls	0	2
All Other Responses	11	12
Not Sure	3	9
(BASE)	(290)	(183)

* Indicates % \approx .5

Totals exceed 100% due to multiple mentions.

G. Consideration Given to Purchasing Sun City Resale Home

Thirty-two percent of current residents and 58 percent of recent purchasers said they considered buying a Sun City resale home prior to purchasing their new home at Sun City West. The primary reasons they gave for selecting Sun City West over Sun City were the prices, the newness of the area and the housing styles and types.

Considered Sun City Resale Home

	<u>Total</u>	<u>Resident</u>	<u>Purchaser</u>
Yes	40%	32%	58%
No	60	68	42
	<u>100%</u>	<u>100%</u>	<u>100%</u>
(BASE)	(410)	(290)	(120)

Reasons for Selecting Sun City West
Rather than Sun City Resale

The Price	34%	26%	44%
Prefer Newness	33	29	38
Prefer Housing Styles / Types	24	28	20
Younger Population	9	12	6
Better Facilities	4	3	4
Nothing I wanted			
Available at Sun City	3	4	1
Friend Relative Lives in			
Sun City West	3	2	3
Previously Lived in Sun City	2	2	0
Miscellaneous	7	6	9
Don't Know	1	1	0
(BASE)	(163)	(93)	(75)

Totals exceed 100% due to multiple answers

H. Reasons for Purchasing Home at Sun City West Rather Than At Some Other Retirement Community

The Arizona climate was the primary reason given by residents and purchasers for buying at Sun City West rather than at some other retirement community. Also high on their lists were the recreational facilities, the retirement lifestyle, the proximity to their friends or relatives and the home prices.

Reasons for Purchasing Home at Sun City West Rather Than at Some Other Retirement Community

	<u>Total</u>	<u>Resident</u>	<u>Purchaser</u>
Climate / Weather	31%	30%	33%
Recreational Facilities	23	21	28
Retirement Lifestyle	19	18	20
Close to Friends / Relatives	18	14	29
Home Prices	16	14	22
Cleanliness of Area	15	15	15
Just Like the Area	12	9	19
Like the Homes	10	8	16
Planned Community - Everything Here	6	5	9
Health Reasons	5	5	7
Homes Are New	5	5	4
Security / Safety	3	2	4
Low Taxes	3	3	1
Investment Possibilities	2	2	2
The Advertising	*	*	0
Miscellaneous	6	6	8
Don't Know	2	3	0
(BASE)	(410)	(290)	(120)

* Indicates % \approx .5

Totals exceed 100% due to multiple answers

I. Future Buying Plans - Recent Visitors

Recent visitors were asked a series of questions to determine if they already had purchased or planned to purchase a retirement home and their reasoning behind their decision. The following important pieces of information were revealed:

- * Only two percent of recent visitors have already purchased a retirement home while 27 percent definitely plan to do so.
- * Forty-nine (49) percent of those visitors who definitely plan to buy a home will buy it at Sun City West.
- * The primary reasons visitors gave for planning to buy at Sun City West were: The climate (41%), the physical appearance of the area (41%), and the recreational facilities available (41%).
- * The climate was the primary decision factor among visitors regardless of where they purchased or planned to purchase.
- * The main reason visitors gave for not planning to purchase a retirement home was that they are happy where they currently live.
- * Only one out of nine visitors who did not / will not purchase a home at Sun City West said they would have been more likely to purchase at Sun City West if the financial alternatives offered were more attractive.

Buying Plans Summary

Have Purchased Retirement Home	2%
Will Purchase Retirement Home	26
Not Sure if Retirement Home will Be Purchased	43
Will not Purchase Retirement Home	30
	<u>100%</u>
 (BASE)	 (183)

Location of Purchase

	<u>Have Purchased</u>	<u>Will Purchase</u>
Sun City West	0%	49%
Florida	0	4
Sun City	50	2
Other Arizona Community	0	2
California	50	2
Not Sure	0	41
	<u>100%</u>	<u>100%</u>
(BASE)	(4)	(47)

Primary Reasons For Deciding
Where to Purchase HomeAmong Those Respondents Who:

	<u>Have/Will Purchase At Sun City West</u>	<u>Have/Will Purchase Elsewhere</u>	<u>Will Purchase But Don't Know where</u>	<u>Have Not Decided Whether Or Not To Purchase</u>
Climate / Weather	41%	44%	60%	36%
Physical Appearance of Area - Clean, Well Kept, Attractive, Well Planned	41	11	0	0
Recreational Facilities	41	0	25	28
Facilities (Non-Recreational)	27	11	40	18
Close to Friends / Relatives	18	33	0	10
Quality Homes	14	0	10	10
Variety of Activities	9	0	30	5
Home Price / Value For Dollar	5	33	25	26
Liked Everything About it - Has all We Wanted	23	0	N/A	N/A
Area Contains Various Age Groups	0	22	0	1
The People / Neighbors	0	0	15	4
All Other Responses	0	22	10	13
Not Sure	0	0	5	17
(BASE)	(23)	(9)	(20)	(78)

Reasons For Not Planning To
Buy Home In Retirement Community

Happy Where I am, Established	48%
Don't Want To be Tied to One Location, Want to Travel, Will Rent	17
Don't Want to Live Among a Lot of Old People	11
Too Expensive	9
Not Ready to Retire	9
Other Comments	4
Not Sure	8
	<u>106%</u>
 (BASE)	 (54)

More Likely to Purchase At Sun City West
If They Offered More Attractive
Financing Alternatives

Yes	11%
No	78
Not Sure	11
	<u>100%</u>
 (BASE)	 (9)

J. Important Factors in Buying Decision - Residents

In an earlier section, current residents were asked an open-ended question on the primary factor which convinced them to buy a residence at Sun City West. In this section, residents were asked how important each of 18 factors were to them in their decision to buy a home at Sun City West.

As the next table reveals, the fact that the homes are well maintained and the low crime rate were the two highest rated factors. Following these two categories were the variety of recreational opportunities and the area climate. The least important of the 18 factors was the financing alternatives available.

	Very Important	Somewhat Important	Not Important	Not Sure
Homes are Well Maintained	88%	10%	1%	1%
Low Crime Rate	83	11	5	1
Variety of Recreational Opportunities	79	13	7	1
Climate in the Phoenix Area	79	13	7	1
Life Style of Sun City West	73	16	10	1
R.H. Johnson Recreation Center	72	15	12	1
Physical Design of Homes	61	27	11	1
Reputation of Del E. Webb Development Company As a Builder of Quality Retirement Communities	60	23	15	2
Price of the Home You Purchased	58	29	11	2
Lot Sizes	55	26	18	1
Close Proximity to Shopping Facilities	55	21	22	2
Boswell Memorial Hospital	54	20	23	3
Desire to Live Among Neighbors in Same Age Bracket	52	27	21	0
The Sundome	52	22	25	1
Sun City West Library	49	30	19	2
Close Proximity to Metro Phoenix Area	46	28	25	1
Number of Golf Courses	39	19	41	1
Financing Alternatives Available	26	13	46	15

K. Additional Facilities Needed At Sun City West - Resident

Eighty-seven percent of current Sun City West residents feel there is a need for additional retail facilities in the area while 43 percent feel there is a need for additional professional service business. Grocery stores (40%) department stores (36%), hardware stores (35%), and restaurants (32%) lead the list of needed retail businesses while doctors (70%), dentists (49%) and lawyers (29%) lead the list of professional service businesses.

In the area of recreation facilities, 37 percent and 33 percent of residents feel there is a need for additional outdoor and indoor facilities, respectively. Golf courses (42%) and swimming pools, both indoor (66%) and outdoor (32%) lead the list of desired recreational facilities.

Need for More Facilities

	Yes	No
Retail Businesses	87%	13%
Professional Service Businesses	43	57
Outdoor Recreation Facilities	37	63
Indoor Recreation Facilities	33	67

Types of Additional Facilities Needed

Retail Business (BASE = 252)

Grocery / Food Stores	40%
Department Store / Shopping Mall	36
Hardware Stores	35
Restaurants	32
Variety Stores	15
Men's Stores	11
Dry Cleaners	10
All Others	41

Professional Service Businesses (BASE = 124)

Doctors	70%
Dentists	49
Lawyers	29
Medical Facilities / Hospital	14
All Others	16

Types of Additional Facilities Needed (Continued)

Outdoor Recreation Facilities (BASE = 108)

Golf Courses	42%
Pools	32
Another Recreation Center	14
All Others	32

Indoor Recreation Facility (BASE = 95)

Indoor Pools	66%
All Others	57

L. Home Amenities - Residents

Current residents were asked whether they felt each of 14 home design features were: (a) a necessity in a retirement home, (b) a nice amenity but not a necessity, or (c) an unnecessary frill. As may be seen in the following table, none of the 14 amenities received a necessity rating of less than 50 percent. Not surprising is the fact that insulation (99%) and smoke detectors (95%) received the highest readings. Quite surprising, however, given the market being studied, is the relative low reading for the security system.

	A Necessity	Not A Necessity	Frill	Not Sure
Insulation	99%	1%	0%	*
Smoke Detectors	95	5	*	*
Lighted Hall / Bedroom/ Bath Switches	91	8	1%	*
Pre-wired Telephone Outlets	90	8	1	1%
Built in Cupboards	90	7	2	1
Enclosed Garages	87	12	1	*
Lighted House Numbers	84	14	2	*
Garbage Disposal	84	14	2	0
Roof Mounted TV Antenna and Pre- wired Outlets	81	17	1	1
Wall-to-Wall Carpeting	77	20	3	*
Patio Cover	70	25	5	0
Solar Water Heater	62	31	4	3
Double Carport	56	37	4	3
Security System	50	41	6	3

* Indicates % \leq .5

M. Attendance At The Sundome - Residents

Ninety percent of Sun City West residents attended an event at the Sundome during the past year with the average resident attending 10.9 events, or roughly one event per month.

Attended Any Events At Sundome - Past Year

Yes	90%
No	10
	<u>100%</u>

Number of Performances Attended - Past Year

1 to 5 Events	31%
6 to 10 Events	30
11 to 19 Events	21
20 Events or More	14
Don't Recall	4
	<u>100%</u>

MEAN (AVERAGE) 10.9

When residents were asked to evaluate the Sundome on five different factors it received positive ratings in each area. Only the ticket prices, with a negative reading of 23 percent received any sizeable negative reading.

Evaluation of Sundome

	<u>Excellent</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>	<u>Not Sure</u>
The Sound System	55%	35%	7%	3%	*
Parking Situation	51	40	5	3	1%
Overall Variety of Events or Performances Offered	49	44	5	1	1
Ticket prices	45	32	22	1	0
The Tram	28	34	5	2	31

The Bob Hope show was the most enjoyed event held at the Sundome last year followed by classical performances such as operas, ballets and symphonies. no event received a significant negative reading.

Events Enjoyed Most

Bob Hope	16%
Operas / Ballet / Symphony	15
Musicals / Dance	13
Travel Shows	12
Wayne newton	12
Red Skelton	10
All Others	85

Events Enjoyed Least

Wayne Newton	6%
Operas / Ballet / Symphony	3
Lecture Series	3
Travel Logs	3
Dance Groups	3
All Other	37
None-Enjoyed Them All	30
Don't Recall	21

Types of Events Would Like To See At Sundome

Broadway Shows / Theatre / Drama	12%
Musicals	6
Operas	4
All Others	28
Don't Know / No Others	60

O. Other DataPreferred Leisure Time Activities

	<u>Residents</u>	<u>Purchasers</u>	<u>Visitors</u>
<u>Outdoor</u>			
Golf	57%	67%	72%
Swimming	42	38	31
Biking/Cycling	18	8	6
Walking/Jogging	18	15	17
Tennis	9	12	9
Mini Golf	8	3	2
Lawn Bowling	5	4	0
Other Outdoor	18	31	29
<u>Indoor</u>			
Bowling	29%	19%	21%
Arts & Crafts	24	26	19
Socializing	15	12	18
Playing Cards/Bridge	13	10	17
Pool/Billiards	12	3	1
Reading	10	6	8
Dancing	10	8	4
Other Indoor	28	42	27

Types of Automobiles Owned By Sun City West Residents

General Motors	62%
Ford Motor Company	27
Chrysler	9
American Motors	1
Foreign	17
None	1

Sun City West Promotion By Current Residents

I actively promote Sun City West to my friends or relatives and feel I've played an important part in convincing some of them to move here. 47%

I actively promote Sun City West to my friends or relatives but don't know if any of them have or will move here because of it. 45

I don't actively promote Sun City West to my friends or relatives 8

Don't Know *
100%
