

2021 - 2025 Comprehensive Economic Development Strategy Central Arizona Governments



Local governments working together to improve the health, safety and general welfare of their citizens, and planning for the future development of the region.

Prepared by Central Arizona Governments (CAG), in partnership with Northern Arizona University Economic Policy Institute, the Center for the Future of Arizona, and U.S. Economic Research, on behalf of the CAG Economic Development District Board of Directors and the Comprehensive Economic Development Strategy (CEDS) Committee.

We thank our partners, the CAG CEDS Committee, local government staff, and others who contributed their time, experience, and expertise to the creation of a document that illustrates the regional values, philosophy, and goals of the Central Arizona Governments Economic Development District.

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CAG REGIONAL VISION AND MISSION

The **vision** for the CAG Region is to create a region that is connected to the Arizona, national, and global economy. This will be accomplished by focusing on five areas within economic development. These focus areas include:

Workforce Development

Infrastructure

Economic Diversification

Water Conservation/Management

Tourism and Experience

Improvement in each of these areas will address many of the challenges of the region while improving incomes, creating jobs, and creating a brighter economic future for the CAG Region.

Upon incorporation, the governmental entities within Gila and Pinal Counties together created the following **mission** statement:

- Encourage local units of government to join and cooperate with one another to improve the health, safety and general welfare of their citizens and to plan for the future development of the region,
and
- Develop and implement constructive and workable policies and programs for meeting and solving the region-wide problems of local government.

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INTRODUCTION

The Central Arizona Governments (CAG) is one of six planning regions within the State of Arizona and was incorporated under the statutes of the State of Arizona on July 31, 1975, as a private, non-profit corporation.

CAG provides regional planning services in transportation, economic development, Community Development Block Grant (CDBG), environmental planning, workforce training, information services, and public facilitation.

CAG was designated by the U.S. Department of Commerce as an Economic Development District (EDD) in 1994. The EDD serves CAG's entire region, which includes two counties, 17 incorporated governments and four Indian Communities. Municipalities include Globe, Hayden,

Map 1: CAG Region



Miami, Payson, Star Valley, and Winkelman in Gila County, and Apache Junction, Casa Grande, Coolidge, Eloy, Florence, Kearny, Mammoth, Marana, Maricopa, Queen Creek, and Superior in Pinal County. Native American Indian Community members include the San Carlos Apache Tribe and the White Mountain Apache Tribe in Gila County, and the Ak-Chin and Gila River Indian Communities in Pinal County.

The EDA developed the CEDS Program as a means of evaluating and quantifying districts across the country. The purpose of a CEDS is to assist EDA and the EDD in establishing regional priorities for projects and investments. A CEDS is intended to promote economic development and opportunity, to foster effective transportation systems, to enhance and protect the environment, and to balance resources through sound management of development.

Map 2: CAG Region Communities



This year's Comprehensive Economic Development Strategy (CEDS) is a 5-year update and has been created in cooperation with the CAG's CEDS Committee and EDD Board. A listing of the CEDS Committee and EDD Board members are identified in Tables 1 and 2.

The CAG CEDS Committee is made up of private and public sector representation from the region.

Table 1: CAG CEDS Committee Members

City of Apache Junction	Janine Hanna-Solley	Town of Hayden	<i>Vacant</i>
Town of Payson	Courtney Page Trever Fletham	Town of Kearny	Sharon Jakubowski Wolz
Ak-Chin Indian Community	<i>Vacant</i>	Town of Mammoth	<i>Vacant</i>
APS	<i>Vacant</i>	City of Marana	Curt Woody
Central Arizona College	<i>Vacant</i>	City of Maricopa	Adam Shipley
City of Casa Grande	Richard Wilkie Fernando Garcia	Town of Miami	Micah Gaudet
City of Coolidge	Rick Miller	Northern Gila County Economic Development Corporation	<i>Vacant</i>
Copper Corridor Economic Development Coalition	Bill Bolin	Pinal County	Stephanie Maack
Town of Winkelman	Sylvia Kerlock	Pinal Partnership	Sandie Smith
City of Eloy	Jeff Fairman	City of Queen Creek	Marissa Garnett
City of Florence	Elan Vallender	Salt River Project & North East Pinal Economic Partnership	Caryn Sanchez
Resolution Copper Company	Bryan Seppala (Chair)	San Carlos Apache Tribe	Kyia Jackson
Gila County	James Menlove	Town of Superior	Arlene Diaz- Gonzalez
Gila River Indian Community	<i>Vacant</i>	Western Bank	Terry Strain
City of Globe & Southern Gila County EDC	Linda Oddonetto (Vice-Chair)		

The CAG EDD Board is made up of representation from CAG’s Regional Council and other appointees from throughout the region. The EDD Board approves the final draft of the CEDS for submission to the Economic Development Administration (EDA).

Table 2: CAG Economic Development District Board

Name	Representing
Chairman Robert Miguel	Ak-Chin Indian Community
Councilmember Robert Schroeder	Apache Junction
Councilmember Robert Huddleston	Casa Grande
Mayor Jon Thompson	Coolidge
Mayor Micah Powell	Eloy
Mayor Tara Walter	Florence
Supervisor Tim Humphrey	Gila County
Governor Stephen Roe Lewis	Gila River Indian Community
Mayor Al Gameros	Globe
Mayor Dean Hetrick	Hayden
Mayor Jamie Ramsey	Kearny
Mayor Patricia Armenta	Mammoth
Mayor Ed Honea	Marana
Councilmember Vincent Manfredi	Maricopa
Mayor Sammy Gonzales	Miami
Councilmember Jim Ferris	Payson
Supervisor Kevin Cavanaugh	Pinal County
Councilmember Robin Benning	Queen Creek
Don Breiland	Salt River Project
Chairman Terry Rambler	San Carlos Apache Tribe
Councilmember Bobby Davis	Star Valley
Mayor Mila Besich	Superior
Vice-Mayor Anita Hinojos	Winkelman
Chairman Ronnie Lupe	White Mountain Apache Tribe

ECONOMIC RESILIENCE

The COVID-19 pandemic has shifted all plans for economic development, growth, and resilience. Some have argued that a new normal has developed and that the economic landscape has been changed moving forward. To this end, we submit that the pandemic has shifted from the notion of an economic shock to a change-point. The pandemic impacts all aspects of this comprehensive economic development strategy and should be considered when attempting to make initiatives successful in this new age.

In building economic resilience, economic development organizations will consider their roles in the pre- and post-incident environment to include steady-state and responsive initiatives. Steady-state initiatives are long-term efforts that seek to bolster the community or region's ability to withstand or avoid a shock. Responsive initiatives establish capabilities for the economic development organization to be responsive to the region's recovery needs following an incident.

Within this 5-year time period, a toolkit will be developed for businesses as part of a responsive economic resilience initiative. The purpose will be to provide businesses in the region with resources they can use in the event of an unexpected disaster. This may include natural disasters, such as wildfires, droughts, and flashfloods; health issues, such as what has been experienced in the current pandemic; communication channels for notification in unexpected scenarios; and collaboration in working with partners statewide and across state boundaries.

The CAG Region is resilient. Research by the University of Arizona after the 2008 recession indicated that these factors, present in parts of the CAG region, would increase a county's economic vulnerability: a greater distance to a metropolitan area, a larger percentage of public land, and a natural environment that makes development more challenging [*Economic Resilience and Vulnerability in the Rural West*, T. Rahman et.al. pg. 11-12]. However, the CAG region displayed resilience in weathering the 2008 recession and surviving global market ups-and-downs in key industries. In a February 2021 survey of businesses in the region, 48% reported having maintained operations during the COVID-19 pandemic and 13% expanded operations. Only 2% closed permanently due to the pandemic. The majority of businesses (83%) reported having adapted their businesses, and 86% are confident their business will continue to cope.

There are opportunities for improvement in five key factors that would have long lasting effects on the resilience of the region. These factors are workforce development (including education), infrastructure, economic diversification, water conservation/management, and tourism and experience.

Workforce Development

Educational attainment will be a key to the future economic success of the region. The CAG Region would benefit from increasing the number of graduates with bachelor's degrees and higher degrees. The region significantly drops below the U.S. average in the number of graduates. Education leads to greater incomes and opportunities for residents. This can come in either attracting graduates to the region or keeping graduates in the region.

Compared to the U.S. and to the state of Arizona, Pinal County has struggled with a greater

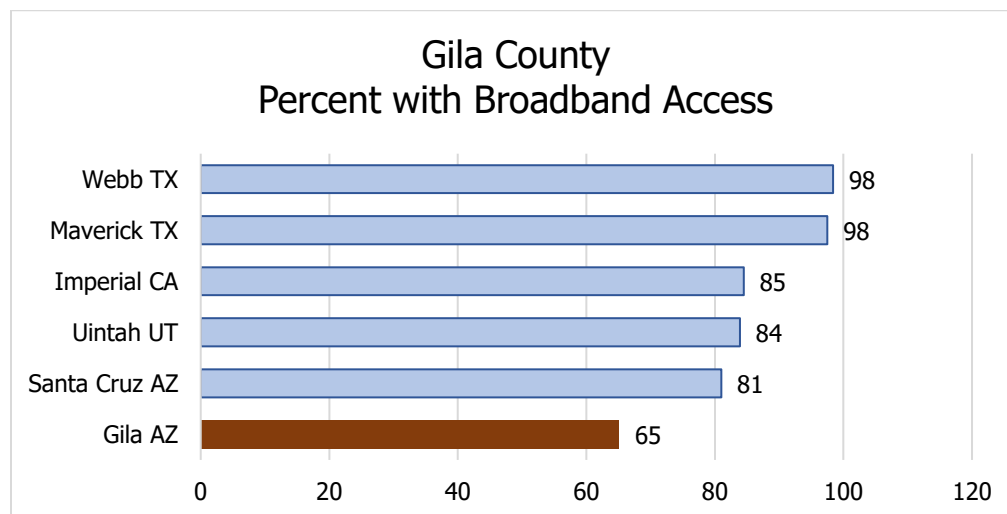
negative percent change in employment between January 2020 and mid-October 2020. For low wage workers the percent change in employment between those timeframes was: US -19%, Arizona -19.5%, Pinal County -36.3%; and for middle-wage workers: US -4%, Arizona +0.9%, Pinal County -6.4%. [tracktherecovery.org]

The CAG region includes two regions of Arizona@Work: Arizona@Work Pinal County and Arizona@Work Northeastern Arizona. Both regions work independently under their respective elected boards, however cross county collaboration does occur. Both regions serve job seekers of all backgrounds, all skills levels, and all ages; for those looking to find employment or further education. COVID-19 has increased the capability of Arizona@Work to offer these services virtually, and the two regions will see this continue to increase as the communities recover from the pandemic.

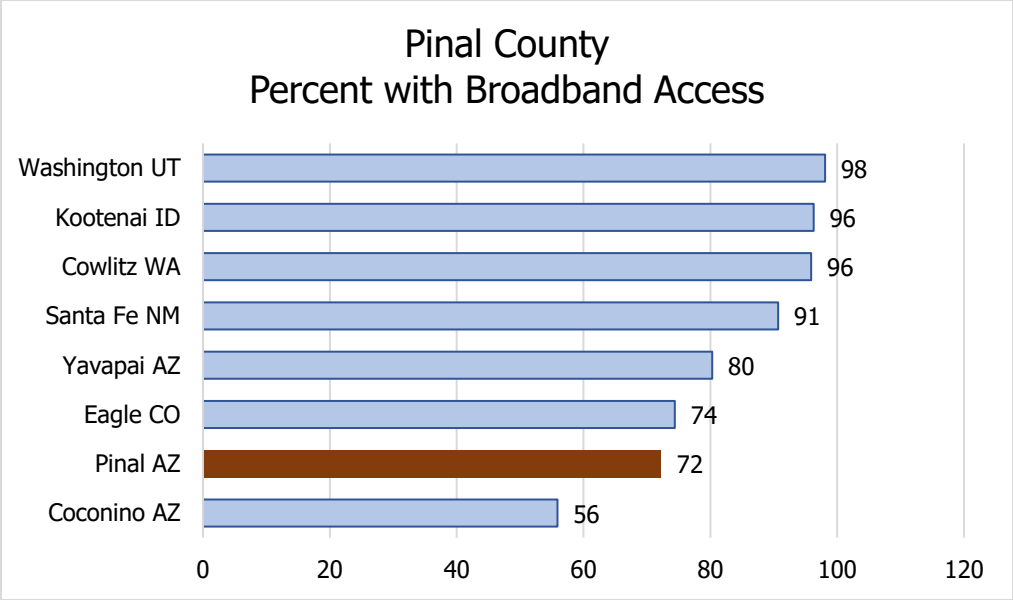
Central Arizona College is also a key partner in workforce development activities in Pinal County, with a variety of training programs for growing industries including Lucid Motors, Nikola, and Resolution Copper. Resolution Copper just recently completed their pilot apprenticeship program, in which 12 local residents earned certifications in one of three trades to support future underground construction.

Infrastructure Broadband

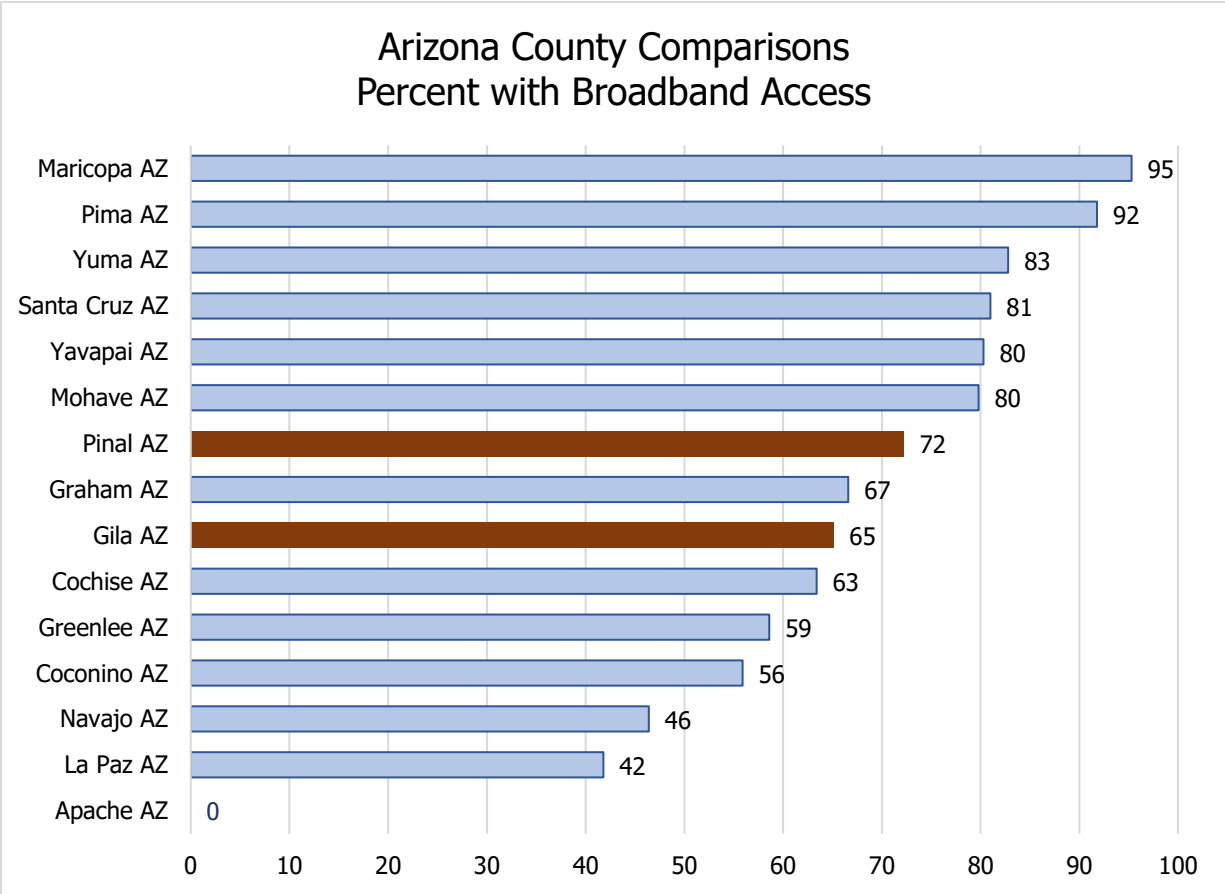
In joint meetings with two of the other Economic Development Districts (EDDs) in Arizona, it became obvious that all three regions share the lack of broadband access and connectivity, which is a steady-state economic resilience initiative. These 3 regions (CAG, SEAGO, NACOG) account for 10 of the 15 counties in Arizona. The Arizona Commerce Authority (ACA) is working on a statewide plan to extend the middle-mile for broadband access and recommended that the rural areas work on the last-mile plans by communicating with service providers (carriers) and ensuring the rural infrastructure is upgraded so that service providers (carriers) can easily work with rural areas to extend their service to the last-mile. Cities in Arizona have been identified as good examples because of the way they work with large carriers. The pandemic has highlighted the critical need for reliable broadband in everything from remote work to telehealth to required new online business offerings to remote students.



Source: www.fcc.gov



Source: www.fcc.gov



Source: www.fcc.gov

Housing

Another steady-state economic resilience initiative that all three EDDs share are housing issues, both of affordability and of availability.

Stakeholders shared that in Payson there is no housing supply for workers, and the prices are escalating. This area is close to Phoenix with more moderate temperatures, making it an attractive location in which to live, but service industry workers are priced out. The residents of Payson are averse to apartments or any kind of high-density housing and low-income housing. Payson hasn't had the funds to do a newer housing study. In Globe, the housing inventory is very old; the hospital has tried to attract employees but people can't find an adequate home so they won't bring their families to the area. Payson and Globe are in Gila County, which has only 3.5% private land, in other words, land that can be developed. Housing has disappeared in the whole county. Gila County is partnering with Globe and CAG on a housing analysis study.

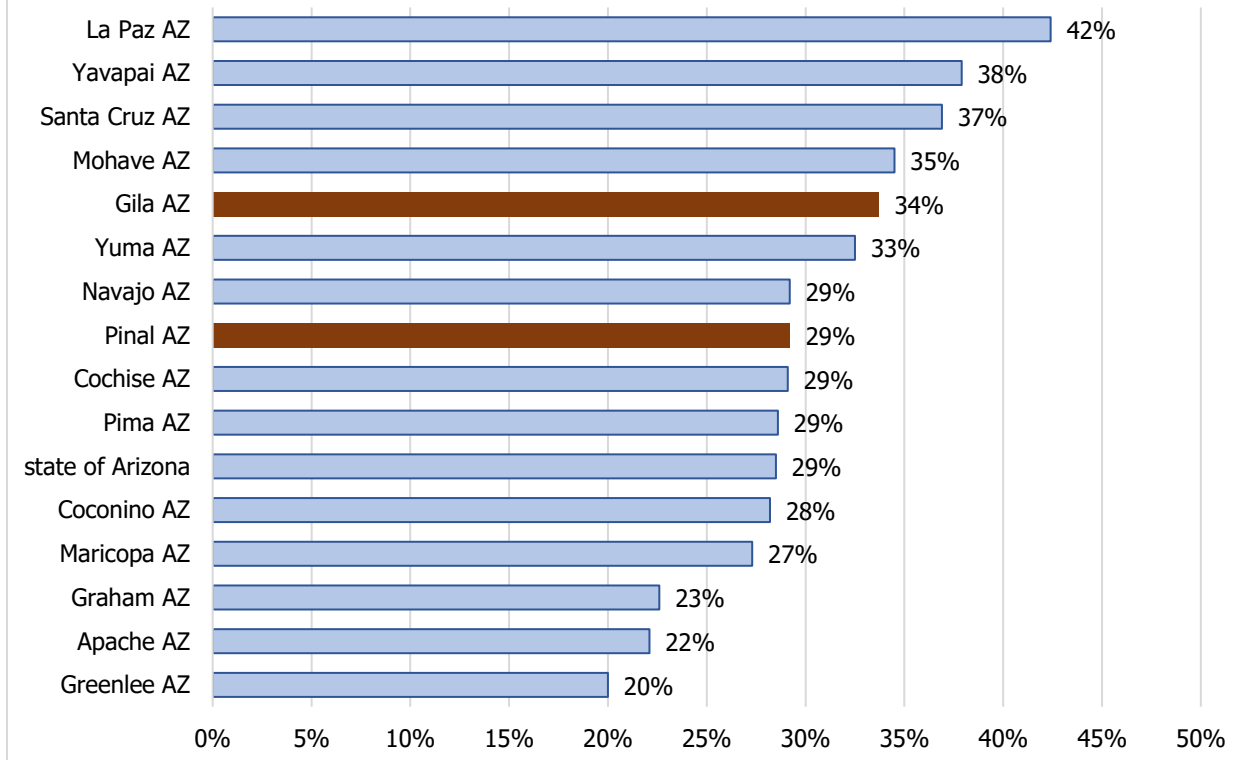
In Pinal County, Apache Junction did a housing assessment 10 years ago. Fifty-five percent of housing was manufactured or mobile homes. The area struggled in the past to get high-density housing because developers weren't able to drive the rent prices; however, that is changing. Recently, nearly 2800 acres of state land was bought by a developer to build a master planned community, and in northern areas of the city, infill parcels are being purchased by condo and townhome developers. Homes are selling quickly, and though they have been affordable in the past, there is concern that it will change.

In the Casa Grande area of Pinal County, neighborhoods are starting to come to life with more multi-family housing on the market. There are proposals in process with hopes of completion. More variety would help as the area is lacking low-income housing on one side of the pricing scale and homes acceptable to executives on the other side of the pricing scale. The latter has been something that potential businesses mentioned as a reason for not locating in that area. One company is bringing 2000 jobs to the area in the next 2-4 years, and housing is needed for that increasing workforce.

One company in Superior, which straddles Gila and Pinal Counties, has employees willing to drive 40 miles to find homes. Additionally, there is almost no new housing in the area, with the exception of Florence. A new copper mine will be operating there within 10 years. During the construction time leading up to that, there will be 2000-3000 construction jobs for which workers will need housing. The lack of private land is also a challenging factor. The schools own a lot of the land, yet there is insufficient housing for their teachers. However, there is some hope because recently the school sold 40 acres, and Superior annexed land that can be used for housing.

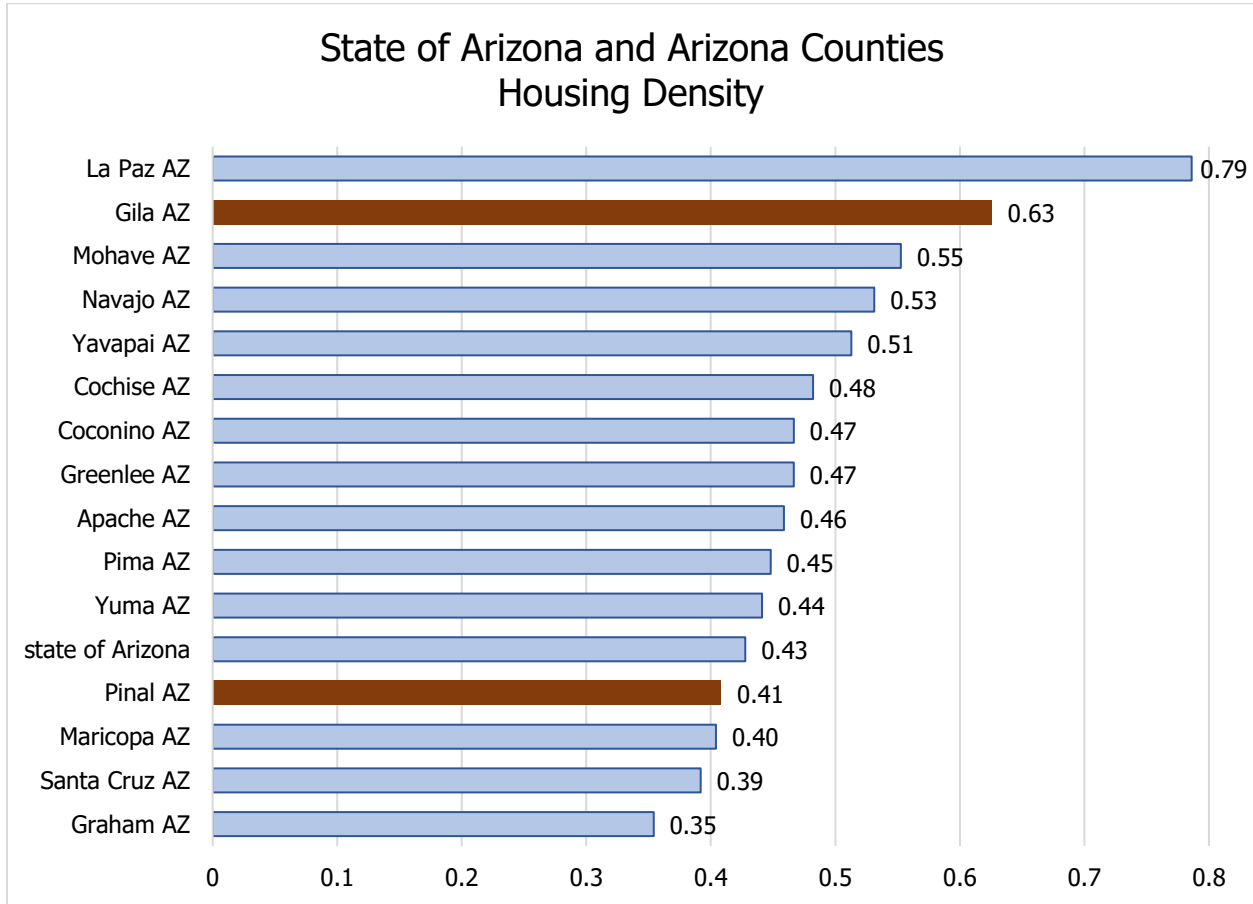
Home ownership is less affordable in the CAG region than statewide and nationwide. Within the CAG region and in the state of Arizona, housing is considerably less affordable in Gila County where more than a third of homeowners pay 30% or more of their income for housing.

State of Arizona and Arizona Counties Homeowners paying 30% or more of income for housing



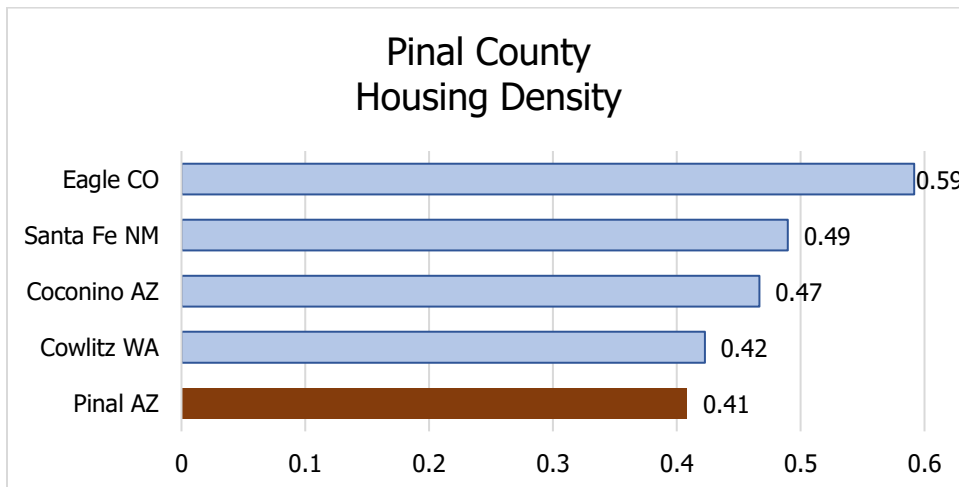
Source: American Community Survey 2014-2018

Pinal County struggles with housing availability. When measuring availability using housing density, the number of housing units per person, Pinal ranks 4th from the bottom.



Source: American Community Survey 2014-2018

Pinal County has the lowest housing density, when compared to 4 Western counties, based on a study performed by Northern Arizona University in identifying economically comparable Western counties in the U.S.



Source: American Community Survey 2014-2018

Transportation

The CAG Region has developed along transportation corridors, with the Interstate 8, Interstate 10 and US 60 corridors serving the main population centers for the region. Additional highways, such as US 87 and State Routes 77, 188, and 287 connect much of the remaining population centers. Following are maps detailing the transportation assets in the region. These assets include railroad service within Pinal County, municipal airports, and highways. The only fixed-route transit within the region is the Central Arizona Regional Transit system, connecting Florence, Coolidge, Casa Grande, and Central Arizona College. Continued investments in transportation infrastructure are important to the region in order to maintain existing road networks, while investing in strategic new roads and highways. With an expanded transportation network, the CAG Region would be poised to capitalize on growth between Phoenix and Tucson, while connecting the region to domestic and international markets.

Water, Sewer, Power & Gas

The majority of the region contains inadequate infrastructure, whether due to a lack of service, or through needed repairs and upgrades to local systems. As with many cases within the U.S., rural areas, and even some urban areas within the CAG Region, struggle to maintain their existing systems. It is imperative that these systems are upgraded and expanded to provide for the needs of residents and businesses currently invested in the region. By expansion of these utilities, the CAG Region will be able to attract new businesses with the expanded capacity, and accommodate the overall population growth of the region. Central Arizona is home to the Central Arizona Project, an aqueduct system bringing water from the Colorado River to the central part of the state.

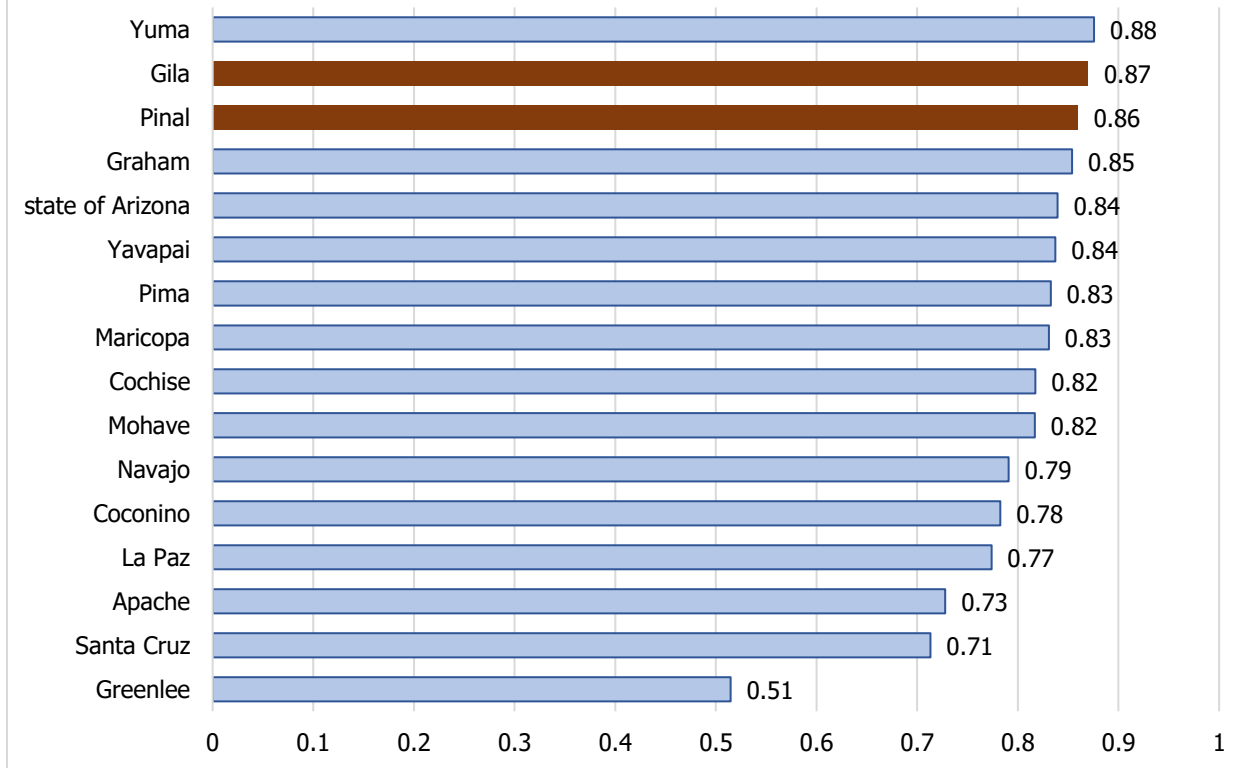
Economic Diversification

The CAG region relies heavily on a few industries. Diversifying the economy, while maintaining the current legacy industries (mining, agriculture, etc.), is of great importance. Diversification allows for recovery in other industries if one or two industries experience a downturn. This can be accomplished through new business creation, targeting new industries that have linkages to current regional industries, and building a workforce to meet the needs of current and future employers. With the passage of Proposition 207 by Arizona voters in 2020, the cannabis industry could become one of the “new industries” in the CAG region.

Exports play an integral role in the resilience of any economy and will be important in the future. As the CAG Region continues to grow in between the large metropolitan areas of Phoenix and Tucson, so too will its influence on the state, national, and global economy. Businesses need to focus on increasing international trade so when national markets experience lags or downturns, international markets can support regional industries. According to a study by the University of California, Berkeley, regions that have many export industries are more resilient to employment downturns. Focusing on growing industries with export potential will also bolster the resilience of the CAG Region.

The CAG Region has a high level of industrial diversity. Industrial diversity is based on the percentage of employment in each industry in a county and measures the variety of different industries. Research shows that counties with more diverse industry structures fare better during times of national or local employment shocks. [The Role of Industry Diversity in Economic Resilience by L. Brown et.al. 1/19/2016] In the state of Arizona, Gila and Pinal counties rank 2nd and 3rd of all 15 counties.

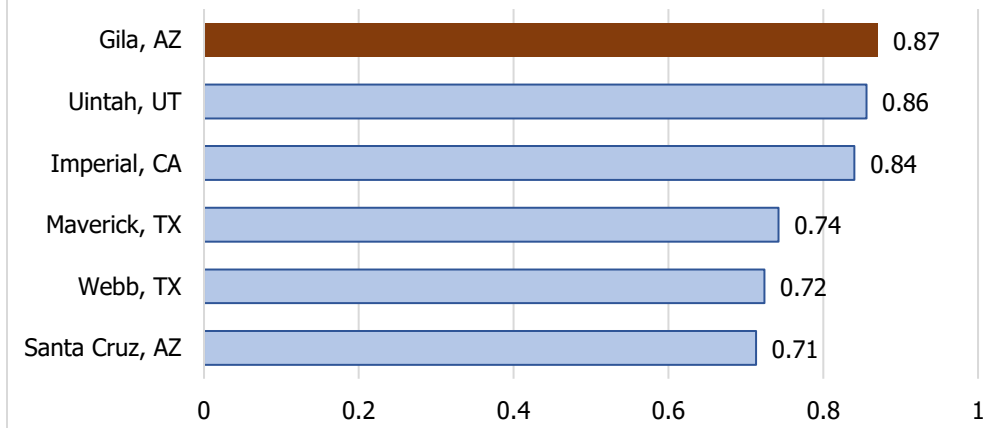
State of Arizona and Arizona Counties Industrial Diversity



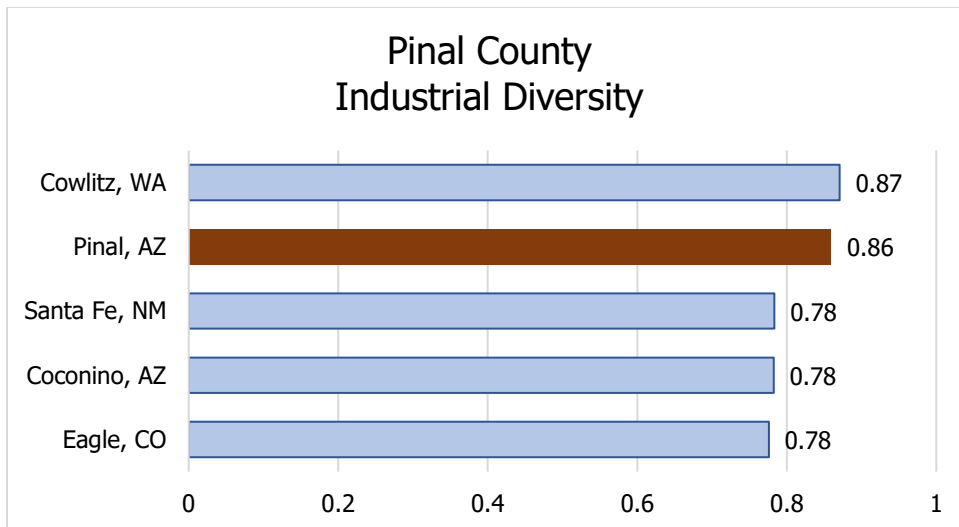
Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW) 2019 annual average

When compared to similar western counties, Gila ranks 1st and Pinal ranks 2nd.

Gila County Industrial Diversity



Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW) 2019 annual average



Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW) 2019 annual average

It remains to be seen how the CAG region will recover from the pandemic. The Western Rural Development Center analyzed vulnerable industries and employment by U.S. county as a result of this pandemic. Their method was based on the fact that certain industries, which they labeled “high-risk”, were hit harder by this pandemic, including travel and tourism; accommodations and food; arts, entertainment, and recreation; passenger transportation; and the energy sector, including oil and gas. On a scale of 1-6, where 1 is the least vulnerable to these pandemic issues and 6 is the most vulnerable, Pinal County was rated 3 and Gila County was rated 6, i.e. the most vulnerable. [*Vulnerable Industries and Employment in U.S. Counties* by T. Harris et.al, June 24, 2020] This would indicate that the pandemic may affect the CAG region to a greater extent than other regions in the U.S.

Water Conservation/Management

In this desert region, the need to carefully manage water is an ongoing issue for all 3 EDDs. One of the challenges in the region is the multi-decade Arizona Water Adjudication, as well as pollution. Water usage varies in different parts of the county. The majority of water in Arizona originates from below ground aquifers and subflows. Communities and regulators need to continue to pursue water management best practices to ensure adequate water for future generations while also fostering industry.

Stakeholders shared that water systems in Gila County are antiquated and some are at risk. Some cities are on wells, and there is no centralized wastewater system in Claypool. Homeowners are heavily taxed in this low-valuation area. Yet they need to produce \$25-35 million in 3 phases, some of which needs to be raised before USDA money can be accessed for this \$70 million project. People can only sell homes in this area if the buyer has cash because banks won't finance these due to septic systems vs. wastewater treatment areas. The city of Apache Junction has been working very hard to secure and manage multiple water sources to reduce groundwater usage. Part of their water challenge ahead may be that allocations of water for housing compared to economic development uses. Also, the water utility is not currently a city service; there are two service providers: Apache Junction Water District and a private Arizona water company. That sometimes makes long-term planning and prioritizing water infrastructure more difficult.

In northern Gila County, a pipeline from Cragin Reservoir was completed and water is flowing, but the forest around it is dense and overgrown. Unless the area can be thinned, any high intensity fire could fill the reservoir with debris.

The Water Infrastructure Funding Authority (WIFA) provides loans and grants to small communities for water and wastewater systems as well as to private providers to make necessary upgrades. Grants and loans can be used to do engineering work and to fund the necessary pre-development work. The possibility exists for a significant part of the loan to become a forgivable principle component.

Tourism and Experience

The natural beauty and small town charm of the region offer the potential to attract film and media projects. Because tourism and experience is a significant economic driver in the region, included here are some examples of existing programs.

Gila County has a website to draw visitors to the area (<https://www.discovergilacounty.com/>). In this website's first year of existence, hotel occupancy increased by 15%.

In 2019, Pinal County saw over \$774 billion dollars in direct spending and over \$65 billion in tax revenues from tourism. The same year, Pinal County Board of Supervisors added tourism to their targeted economic development sectors. The county has a dedicated tourism website: <https://www.pinalcountyz.gov/Visitors/Pages/Home.aspx>. Pinal County's first visitors guide was published in 2019: <https://www.pinalcountyz.gov/Visitors/Documents/PinalCountyVisitorGuide.pdf>.

Pinal County has created videos to attract visitors and provide information about local activities and opportunities, titled Pinal County Wide Open Opportunity:

<https://www.youtube.com/watch?v=ZbqTotzIqVM&t=1s>

<https://www.youtube.com/watch?v=N35TQ8xpMKo>

https://www.youtube.com/watch?v=fsK_AmTVDSA

The city of Casa Grande would like to do something similar for their city.

The Town of Superior is working with Resolution Copper to develop an economic development framework, in partnership with Arizona Strategies. As part of Resolution Copper's COVID-19 relief funding, Arizona Strategies will be assisting the Town of Superior with economic development efforts, specifically in support of a tourism centered economy that is complimentary to and not dependent on the mining industry.

Arizona Strategies initial work has included land use planning, stakeholder engagement, site criteria maps, conceptual site plans, community vision exercises and identification of potential key partners. Arizona Strategies work in 2021 will include the development of a roadshow book and recruitment tool for the Town of Superior and Superior Chamber of Commerce, including a deck for outdoor adventure tourism and Historic Main Street. In addition, Arizona Strategies will build on their work from 2020 and support with the recruitment of strategic development partners. A lead cultivation report will be developed to support the Town of Superior and Superior Chamber of Commerce in their economic diversification efforts.

The purpose of marketing and tourism for the Town of Payson is to create a cohesive brand that fosters community pride and compels visitors to experience Payson through the eyes of a

local. Payson has operated under a successful and sustainable Adventure Where We Live Campaign which has resulted in community generated content for residents and businesses to affiliate with, and a recognizable brand to connect with visitors and other communities. Initiatives within the campaign have developed various levels of content for the website and social platforms.

DEMOGRAPHIC AND SOCIOECONOMIC PROFILE

Employment, Wages, and Income

Employment. The Central Arizona Governments (CAG) region is heavily reliant on government employment, particularly at the state- and local-government levels. Regionwide, 33% of total nonfarm employment is in the government sector (more than double the statewide rate of 14.4%). Government employment is especially prevalent in both Gila County (where 36.7% of total employment is in the government sector) and Pinal County (with overall government employment accounting for 32.2% of all jobs there).

The CAG region, like Arizona overall, is predominantly a service economy with 86.4% of all jobs in service industries (including government)—just behind the statewide rate of 87.7%. Pinal is the more heavily service-oriented county in the region with 87.8% of all jobs in services (including government). Gila County is less dependent on service-sector jobs, which account for 80.6% of all employment. Gila County has a larger share of goods-producing jobs than regionwide and statewide at 19.4%. Statewide and regionwide, goods-producing jobs account for just 12.3% and 13.6% of jobs, respectively.

Employment in the CAG Region is driven by mining, agribusiness, manufacturing, logistics, and food processing, arts & entertainment, and recreation. These three sectors account for a majority of the employment in the region. Industries that have potential to grow in the region include these sectors, as well as defense and security, education and knowledge creation, biomedical/biotechnical, business services, distribution and e-commerce, and the chemical based product sector. Following are the employment figures and cluster analysis for the CAG Region.

Cluster analyses measure the saturation of employment or establishments (businesses) within a region. A location quotient of 1.00 indicates the national average for saturation. A location quotient of more than 1.00 indicates higher saturation; while numbers below 1.00 indicate saturation lower than the national average. For example, mining in the CAG Region has an employment location quotient of 29.39. This means that there is a hugely concentrated sector of employment in mining in the CAG Region. This is primarily due to copper mines and resources. The mining establishment location quotient is 5.67. This means there are more companies than what would be expected using the national average, but these companies are quite large when comparing them against the employment location quotient.

When considering lower saturation, transportation equipment manufacturing in the region has an employment location quotient of .07. This means that very few people in the region are employed in this sector when compared against the national average saturation.

Arizona Employment by Industry (2019)

	Jobs (000s)	Share of Total Nonfarm Jobs
Total Nonfarm	2,937.4	100.0%
Total Private	2,514.9	85.6%
Goods Producing	361.4	12.3%
Natural Resources and Mining	13.5	0.5%
Construction	170.7	5.8%
Manufacturing	177.3	6.0%
Service-Providing	2,576.0	87.7%
Private Service-Providing	2,153.5	73.3%
Trade, Transportation, and Utilities	542.8	18.5%
Information	48.8	1.7%
Financial Activities	229.9	7.8%
Professional and Business Services	444.6	15.1%
Educational and Health Services	461.8	15.7%
Leisure and Hospitality	330.7	11.3%
Other Services	94.9	3.2%
Government	422.5	14.4%
Federal Government	56.3	1.9%
State Government	91.6	3.1%
Local Government	274.7	9.4%

Source: Arizona Office of Economic Opportunity and US Economic Research

CAG Region Employment by Industry (2019)

	Jobs	Share of Total Nonfarm Jobs
Total Nonfarm	76,950	100.0%
Total Private	51,525	67.0%
Goods Producing	10,475	13.6%
Service-Providing	66,475	86.4%
Private Service Providing	41,050	53.3%
Trade, Transportation, and Utilities	13,300	17.3%
Other Private Service-Providing	27,750	36.1%
Government	25,425	33.0%
Federal Government	1,750	2.3%
State and Local Government	23,675	30.8%

Source: Arizona Office of Economic Opportunity and US Economic Research

Gila County Employment by Industry (2019)

	Jobs	Share of Total Nonfarm Jobs
Total Nonfarm	15,075	100.0%
Total Private	9,550	63.3%
Goods Producing	2,925	19.4%
Service-Providing	12,150	80.6%
Private Service-Providing	6,625	43.9%
Trade, Transportation, and Utilities	2,150	14.3%
Other Private Service-Providing	4,475	29.7%
Government	5,525	36.7%
Federal Government	275	1.8%
State and Local Government	5,250	34.8%

Source: Arizona Office of Economic Opportunity and US Economic Research

Pinal County Employment by Industry (2019)

	Jobs	Share of Total Nonfarm Jobs
Total Nonfarm	61,875	100.0%
Total Private	41,975	67.8%
Goods Producing	7,550	12.2%
Mining and Construction	3,525	5.7%
Manufacturing	4,025	6.5%
Service-Providing	54,325	87.8%
Private Service-Providing	34,425	55.6%
Trade, Transportation, and Utilities	11,150	18.0%
Information	600	1.0%
Financial Activities	1,525	2.5%
Professional and Business Services	6,750	10.9%
Educational and Health Services	6,600	10.7%
Leisure and Hospitality	6,100	9.9%
Other Services	1,700	2.7%
Government	19,900	32.2%
Federal Government	1,475	2.4%
State and Local Government	18,425	29.8%

Source: Arizona Office of Economic Opportunity and US Economic Research

Comparisons: Employment by Industry (2019)

	Arizona	CAG Region	Gila County	Pinal County
Total Nonfarm	2,937,400	76,950	15,075	61,875
Total Private	85.6%	67.0%	63.3%	67.8%
Goods Producing	12.3%	13.6%	19.4%	12.2%
Service-Providing	87.7%	86.4%	80.6%	87.8%
Private Service-Providing	73.3%	53.3%	43.9%	55.6%
Trade, Transportation, and Utilities	18.5%	17.3%	14.3%	18.0%
Other Private Service-Providing	54.8%	36.1%	29.7%	37.6%
Government	14.4%	33.0%	36.7%	32.2%
Federal Government	1.9%	2.3%	1.8%	2.4%
State and Local Government	12.5%	30.8%	34.8%	29.8%

Note. Percentages show share of total nonfarm employment accounted for by the sectors/industries shown.
Source: Arizona Office of Economic Opportunity and US Economic Research

Gila County Major Employers

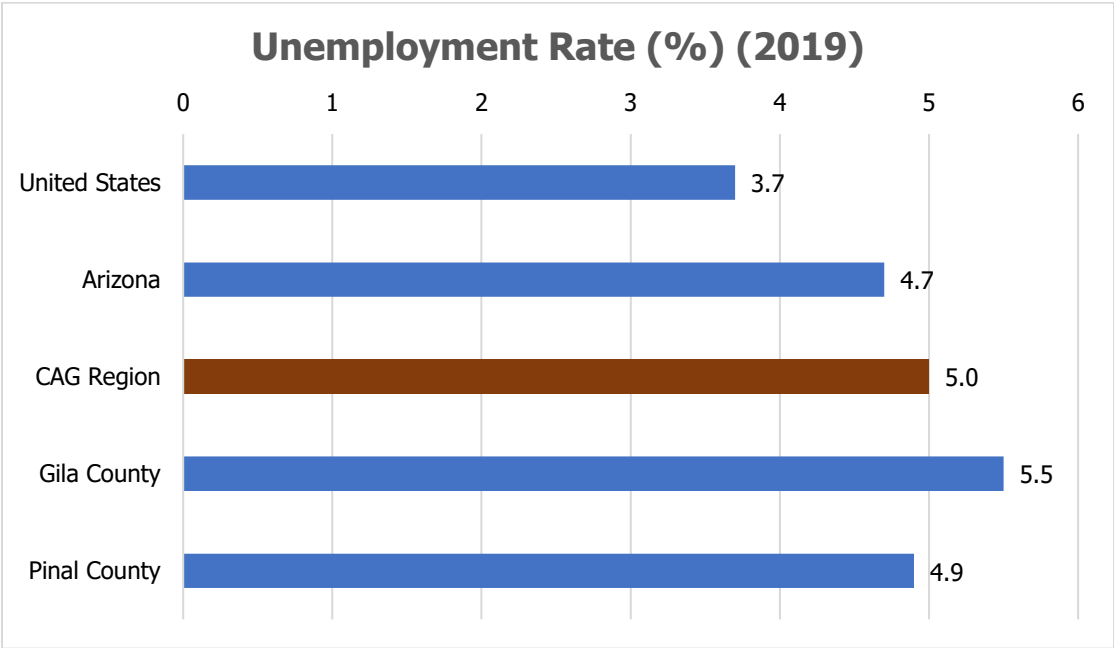
- Apache Gold Casino
- Arizona Department of Corrections
- Banner Health
- BHP
- Capstone Mining Corp
- City of Globe
- Cobre Valley Regional Medical Center
- Freeport-McMoRan
- Globe Unified School District
- Gila Community College
- Gila County
- Mazatzal Casino
- Payson Unified School District
- San Carlos Apache Healthcare Corporation
- Town of Payson

Pinal County Major Employers

- Abbott Nutrition
- Arizona Department of Corrections
- ASARCO
- Banner Health
- Casa Grande, Maricopa, Apache Junction, Florence, Eloy and Coolidge school districts
- Central Arizona College
- Cities of Casa Grande, Maricopa, Apache Junction, Florence, Eloy and Coolidge
- Corrections Corporation of America
- Florence Hospital
- Frito Lay
- Hexcel Corporation
- Lucid Motors
- Monsanto
- Pinal County
- Resolution Copper
- Stinger Welding
- Union Pacific
- Walmart
- Western Emulsions

Labor Force, Employment, and Unemployment. Unemployment in the CAG region in 2019 was higher than statewide and national levels. The regionwide unemployment rate in 2019 was 5.0% (compared to 4.7% statewide and 3.7% nationally). Gila County had the higher unemployment rate in the region in 2019 at 5.5% (compared to 4.9% for Pinal County).

The regionwide civilian labor force consists of 209,157 actual or potential workers as of 2019 with 90% of those in Pinal County. Labor force participation rates (share of the population ages 16 and older who are employed or actively seeking work) in both counties in the CAG region are lower than statewide and nationwide. For the region overall, labor force participation was 48.8% from 2014 to 2018 (compared to 59.5% for all of Arizona and 63.3% nationwide). Within the CAG region, Pinal County had the higher labor force participation rate at 49.1% (compared to just 46.4% in Gila County).

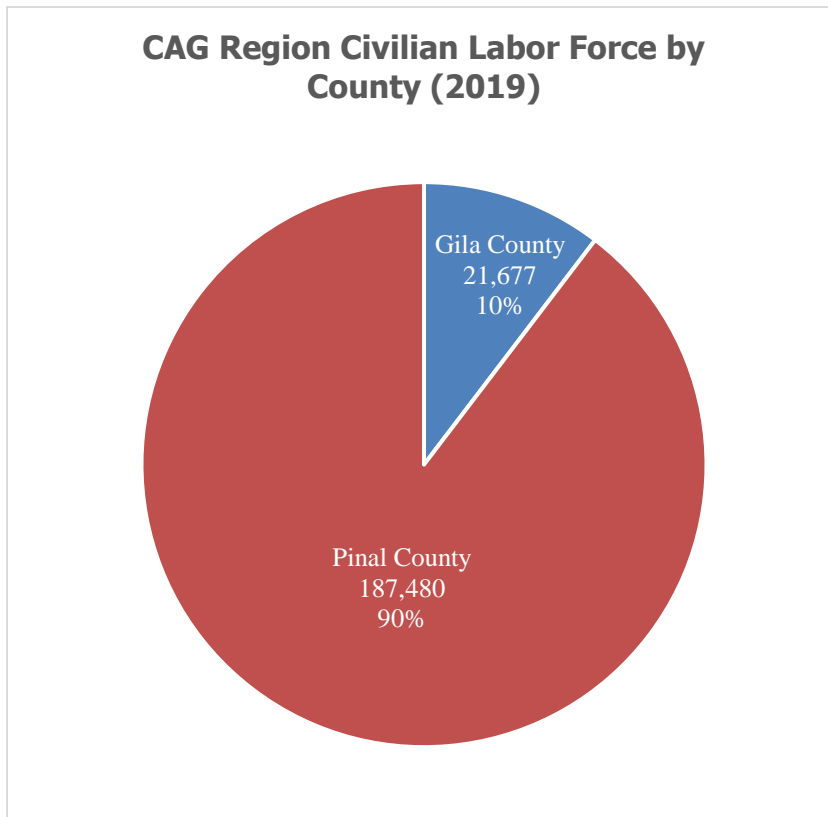


Source: Arizona Office of Economic Opportunity and US Economic Research

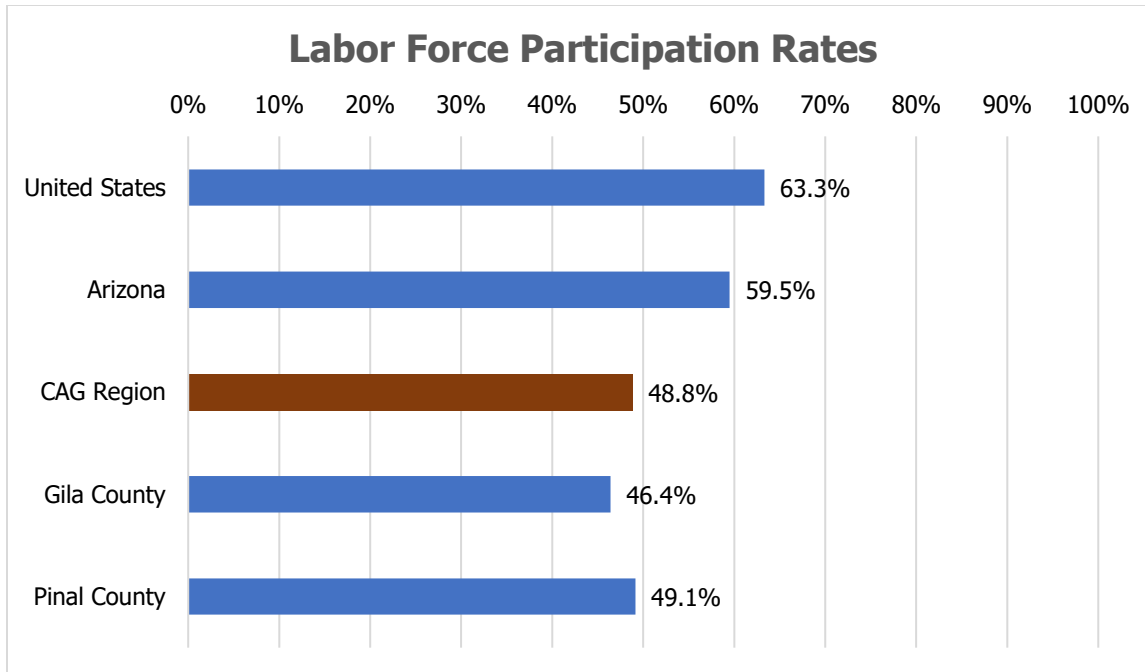
Labor Force, Employment, and Unemployment (2019)

CAG REGION	
Civilian Labor Force	209,157
Employment	198,794
Unemployment	10,363
Unemployment Rate	5.0%
GILA COUNTY	
Civilian Labor Force	21,677
Employment	20,485
Unemployment	1,192
Unemployment Rate	5.5%
PINAL COUNTY	
Civilian Labor Force	187,480
Employment	178,309
Unemployment	9,171
Unemployment Rate	4.9%

Source: Arizona Office of Economic Opportunity and US Economic Research

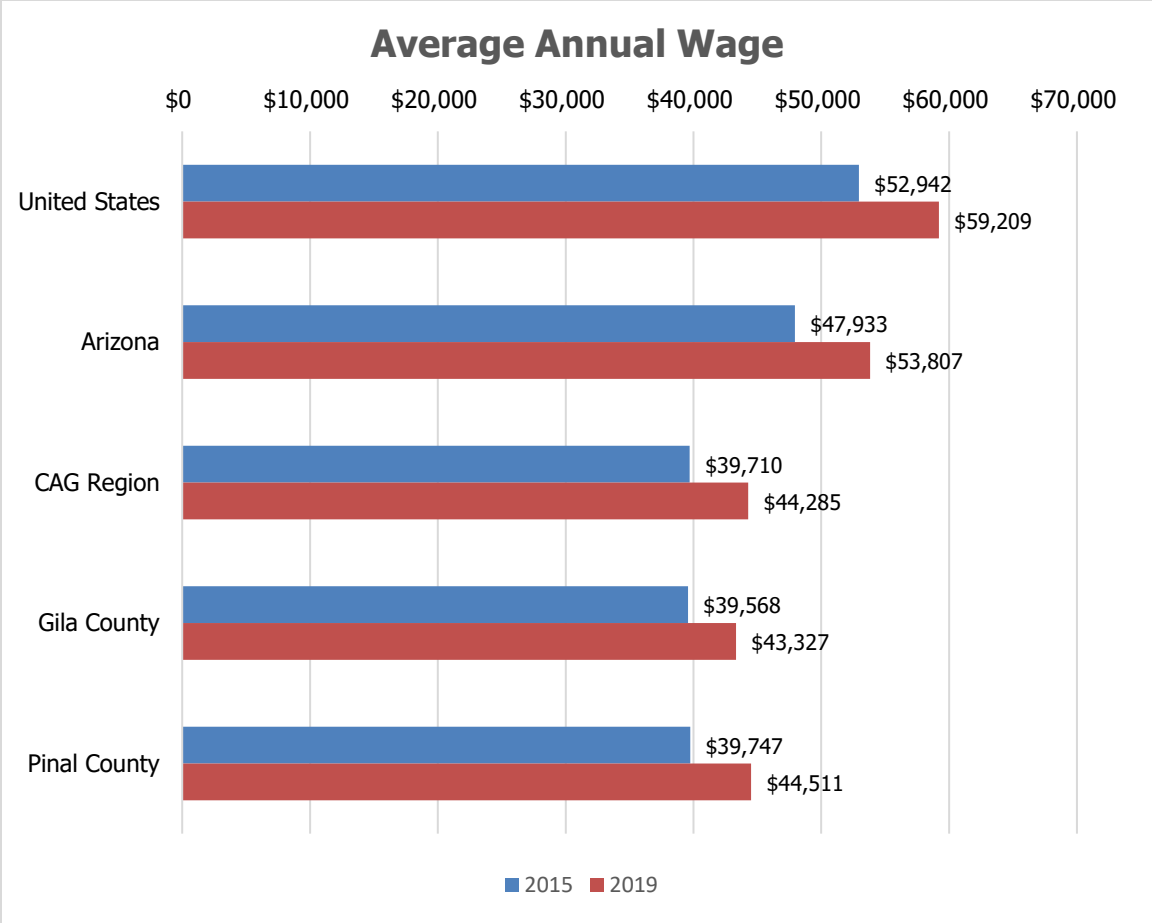


Source: Arizona Office of Economic Opportunity and US Economic Research

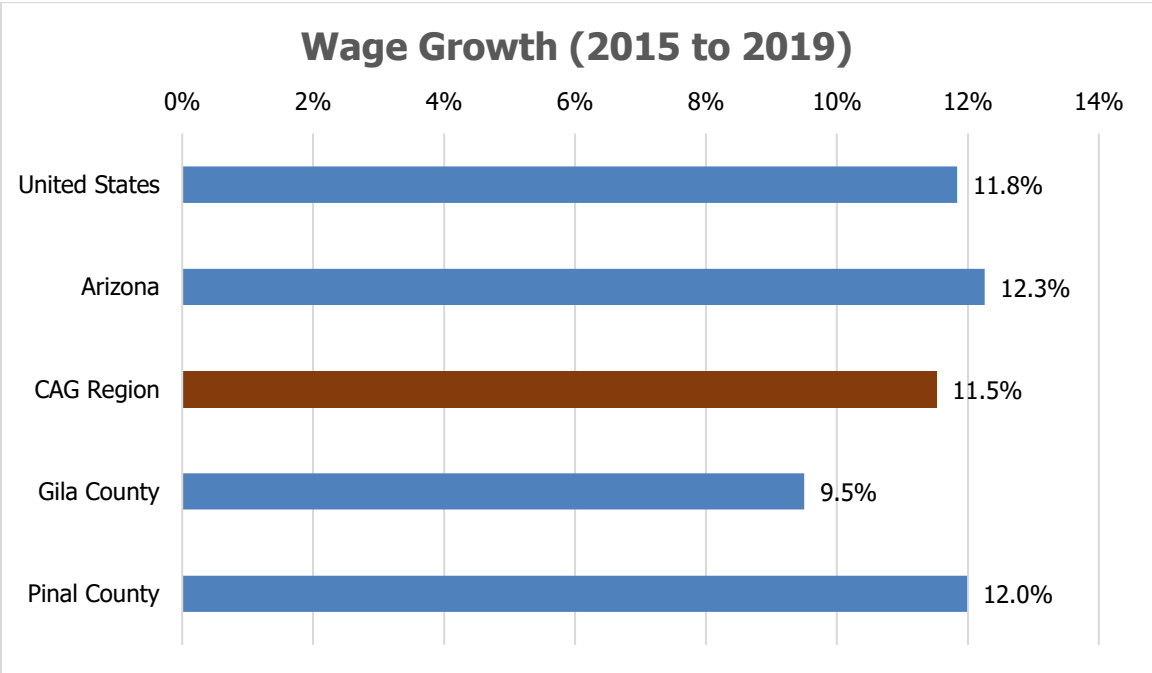


Source: U.S. Census Bureau (2014-2018 American Community Survey 5-year Estimates) and US Economic Research

Wages. The average annual wage in the CAG region was \$44,285 in 2019 (17.7% lower than statewide and 25.2% lower than the national average wage). Wages in the CAG region were pulled up by higher wages in Pinal County with its average wage of \$44,511 (17.3% lower than statewide and 24.8% lower than nationally). Gila County’s average annual wage in 2019 was lower at \$43,327 (19.5% below statewide and 26.8% lower than the national average wage). Wage growth in the CAG region from 2015 to 2019 was 11.5% (trailing both statewide growth of 12.3% and nationwide growth of 11.8%). Pinal County saw wage growth of 12% over the 5-year period, lower than statewide but higher than U.S. wage growth. Wages in Gila County grew by only 9.5% from 2015 to 2019, considerably slower than regionwide, statewide, and nationwide growth.



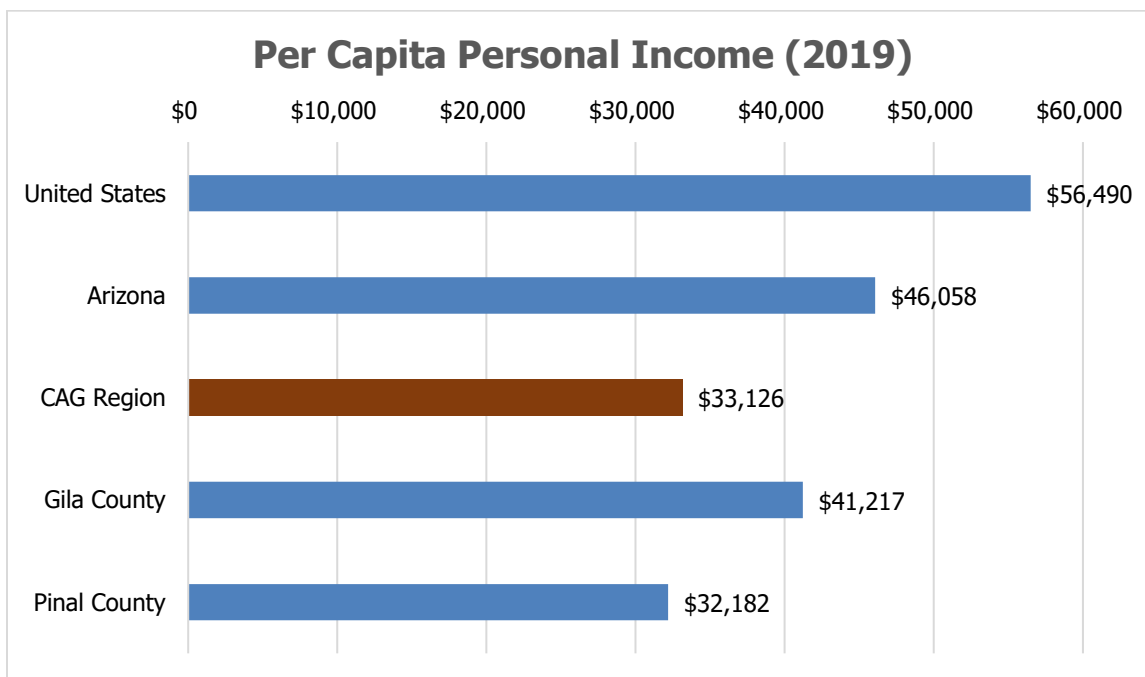
Source: U.S. Bureau of Labor Statistics (QCEW) and US Economic Research



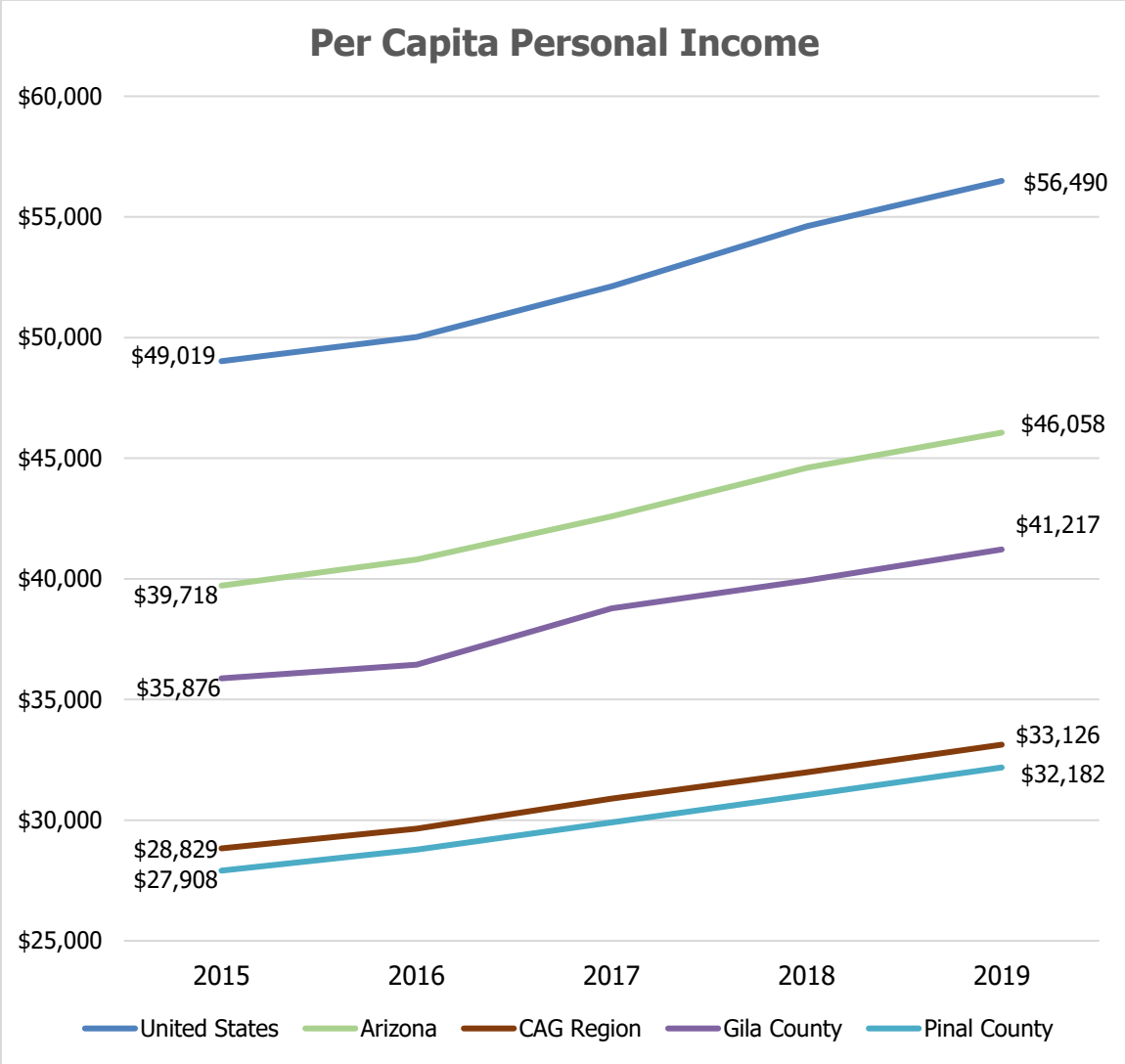
Source: U.S. Bureau of Labor Statistics (QCEW) and US Economic Research

Personal Income. Per capita personal income in the CAG region was \$33,126 in 2019 (28.1% lower than statewide and 41.4% lower than nationally). Per capita personal income in the CAG region was pulled down considerably by lower income in Pinal County, which was just \$32,182 in 2019 (30.1% lower than statewide and 43% lower than nationally). Per capita income was much higher in Gila County at \$41,217 though that was still 10.5% below the state level and 27% lower than nationally.

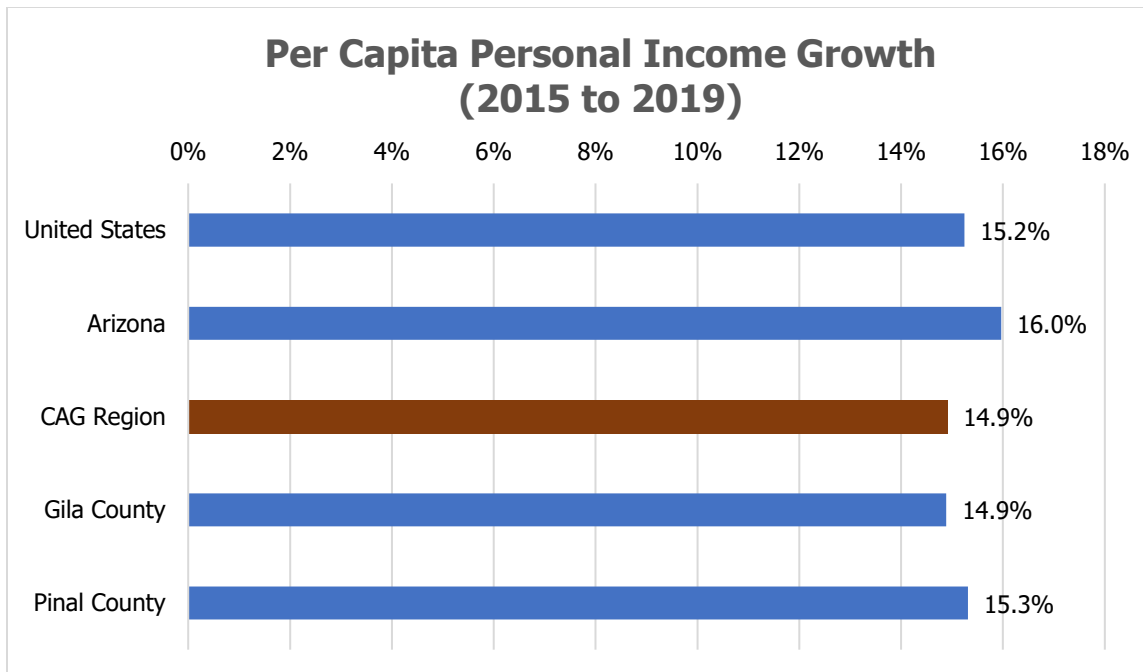
The CAG region saw per capita income grow by 14.9% from 2015 through 2019, with stronger growth in Pinal County (15.3%) than Gila County (14.9%). The stronger growth in Pinal County was slightly ahead of nationwide (15.2%) but below statewide (16%). Per capita income growth for Gila County and the CAG region overall was slower than both the national and state levels.



Source: U.S. Bureau of Economic Analysis and US Economic Research



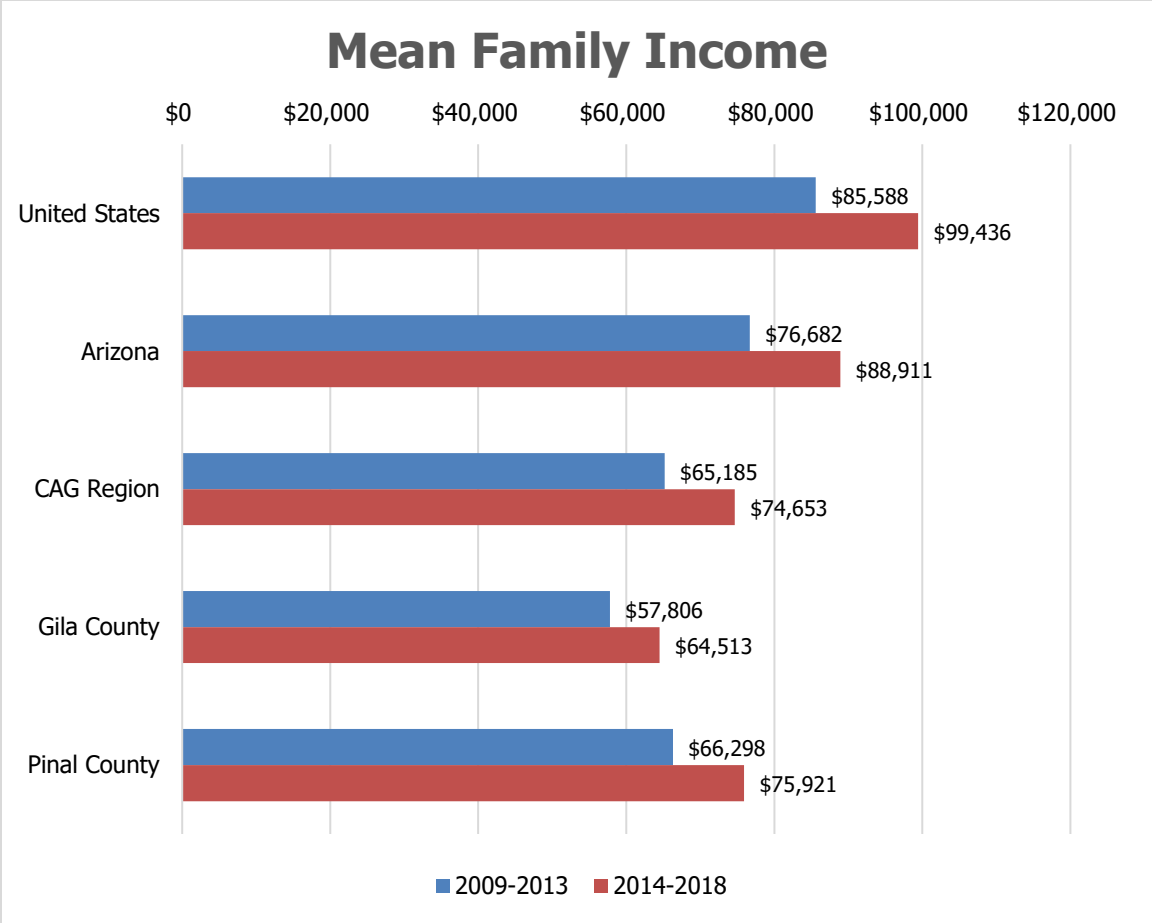
Source: U.S. Bureau of Economic Analysis and US Economic Research



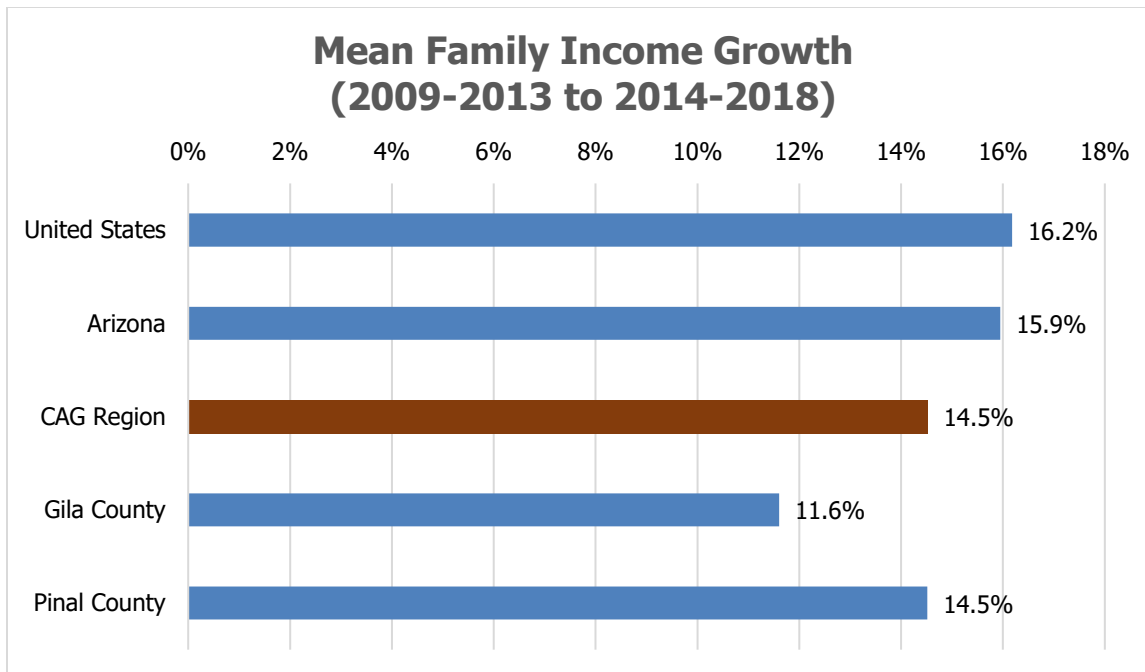
Source: U.S. Bureau of Economic Analysis and US Economic Research

Family Income. Mean (average) family income in the CAG region was \$74,653 from 2014 to 2018 (in 2018 dollars)—16% lower than statewide and 24.9% lower than nationally. Mean family income in the region was pulled up by higher levels in Pinal County (\$75,921, compared to just \$64,513 in Gila County). Family income levels in both counties were lower than the state and national levels from 2014 to 2018. Gila County’s mean family income was 27.4% lower than statewide and 35.1% lower than nationally, while Pinal County was 14.6% lower than state and 23.6% lower than national levels.

Mean family income both in the CAG region and in Pinal County grew by 14.5% from 2009-2013 to 2014-2018, while Gila County saw growth of only 11.6%. The CAG region and both counties saw growth rates below those at the state and national levels (15.9% and 16.2%, respectively) between the 5-year periods.



Note. Data for 2014-2018 expressed in 2018 dollars; data for 2009-2013 expressed in 2013 dollars.
 Source: U.S. Census Bureau (2009-2013 American Community Survey 5-year Estimates and 2014-2018 American Community Survey 5-year Estimates) and US Economic Research



Source: U.S. Census Bureau (2009-2013 American Community Survey 5-year Estimates and 2014-2018 American Community Survey 5-year Estimates) and US Economic Research

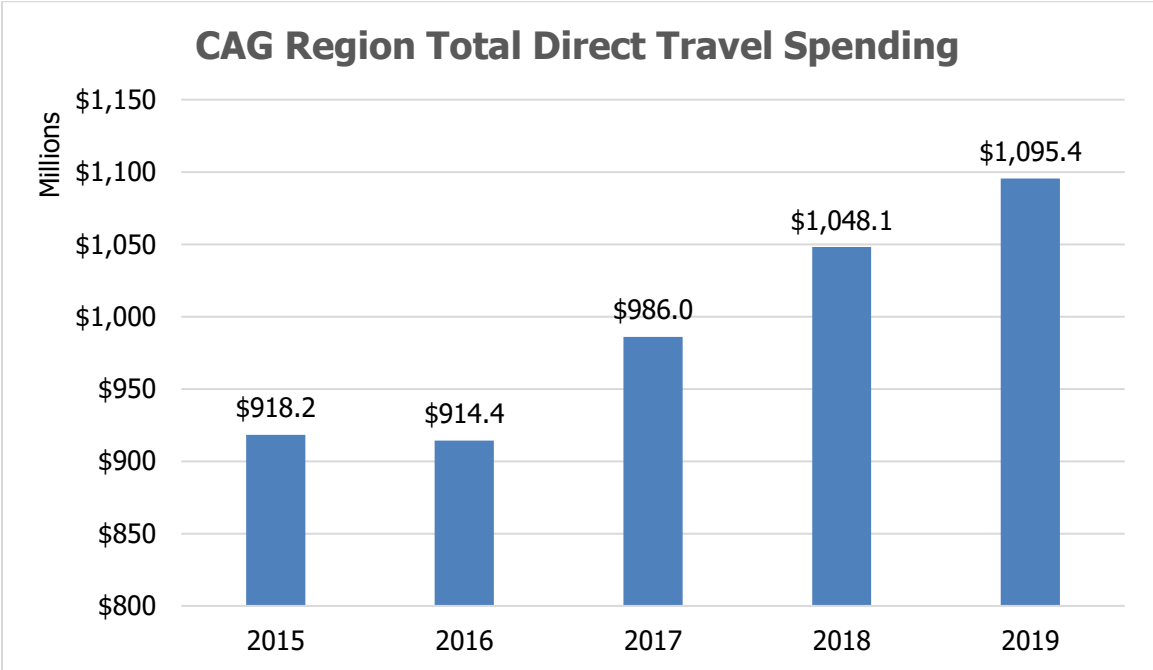
Tourism

Attractions. The CAG region’s major visitor attractions include Apache Gold Resort and Mazatzal Hotel & Casino, Apache Lake, Arizona Trail, Arizona Zipline Adventures, Besh Ba Gowah Archaeological Park, Biosphere 2, Black River, Boyce Thompson Arboretum State Park, Canyon Lake, Casa Grande Ruins National Monument, Coronado National Forest, Florence Historic District, Goldfield Ghost Town and Museum, Granite Dells, Harrah’s Ak-Chin Casino, Hells Gate Wilderness, Hohokam Pima National Monument, Homestead Rock, Ironwood Forest National Monument, Juan Bautista de Anza (National Historic Trail), Legends of Superior Trails (LOST), Lost Dutchman State Park, Mazatzal Wilderness, McFarland State Historic Park, Mogollon Rim, Native American Ruins, Oracle State Park, Ostrich Farm, Peridot Mesa, Picacho Peak State Park, Ray Cooper and San Manuel mines, Renaissance Fair, Roosevelt Lake and Dam, San Carlos Apache Culture Center, San Carlos Lake, Seneca Falls, Shoofly Village Archaeological Ruins, Sonoran Desert National Monument, Superstition Mountains, Skydive Arizona, Stewart Pocket, Tom Mix Memorial, Tonto Creek, Tonto National Forest, Tonto National Park Cliff Dwelling, Tonto Natural Bridge, Tonto National Monument, and Woods Canyon Lake.

Activities. Popular activities in the CAG region include biking, birding, boating, camping, canoe/kayaking, casinos, community events, farmers markets, festivals and parades, fishing, golfing, hiking, horseback riding, hunting, local craft breweries and wineries, motorcycling, mountain biking, museums, off-roading, rock climbing, rockhounding, sightseeing, rafting and tubing, rodeos, scenic drives, shopping, skydiving, stargazing, water sports, and water parks/aquatic centers.

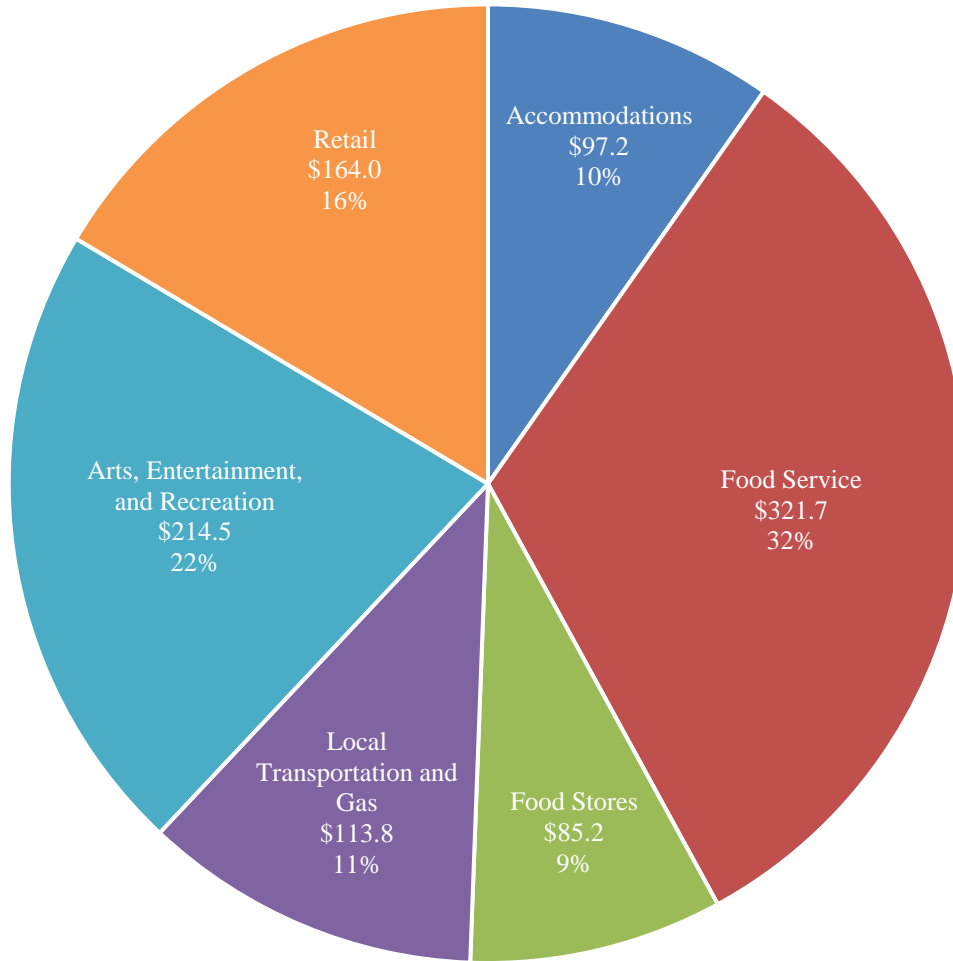
Travel Spending. According to a study by Dean Runyon Associates, commissioned by Arizona Office of Tourism, direct travel spending in the CAG region saw considerable growth from 2016 through 2019. In 2019, direct travel spending in the region totaled \$1.1 billion, up 4.5% from 2018 and 19.8% from 2016. In 2019, spending for food service accounted for the largest share

of visitor destination spending at 32%, followed by arts, entertainment, and recreation at 22%. Retail accounted for the third largest share of visitor destination spending at 16%.



Source: Dean Runyon Associates, Arizona Office of Tourism, and US Economic Research

CAG Region Travel Destination Spending (2019)

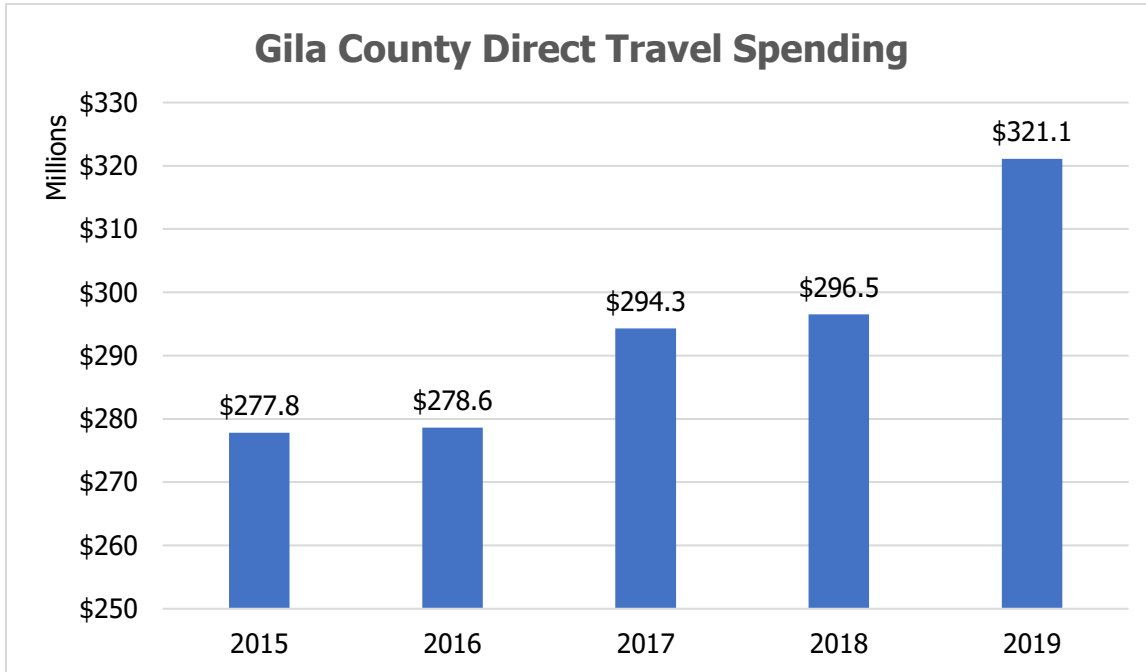


Note. Spending figures in millions of dollars. Source: Dean Runyon Associates, Arizona Office of Tourism, and US Economic Research

Gila County. Major attractions in Gila County include Apache Gold Resort and Mazatzal Hotel & Casino, Arizona Trail, Besh Ba Gowah Archaeological Park, Black River, Bullion Plaza Cultural Center & Museum, Gila County Historical Museum, Granite Dells, Hells Gate Wilderness, Homestead Rock, Mazatzal Wilderness, Mogollon Rim, Native American Ruins, Peridot Mesa, Pinal Mountains, Rim Country Museum and Zane Grey Cabin, Roosevelt Lake and Dam, San Carlos Apache Culture Center, San Carlos Lake, Seneca Falls, Shoofly Village Archaeological Ruins, Stewart Pocket, Tonto Creek, Tonto National Monument, Tonto Natural Bridge, and Woods Canyon Lake.

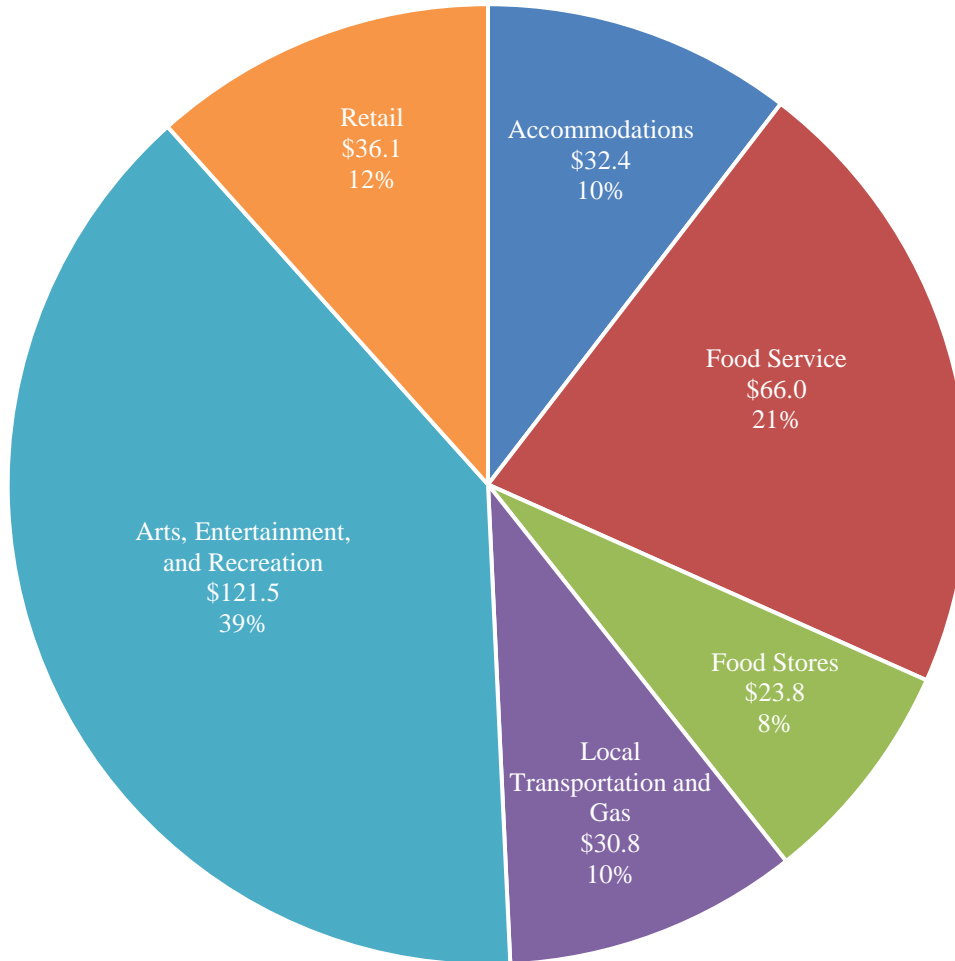
According to Dean Runyon Associates, direct travel spending in Gila County saw continuous growth from 2015 through 2019. In 2019, direct travel spending in Gila County totaled \$321.1

million, up 8.3% from 2018 and 15.6% from 2015. In 2019, spending for arts, entertainment, and recreation accounted for the largest share of visitor destination spending at 39%, followed by food service at 21%. Retail accounted for the third largest share of visitor destination spending at 12%.



Source: Dean Runyon Associates, Arizona Office of Tourism, and US Economic Research

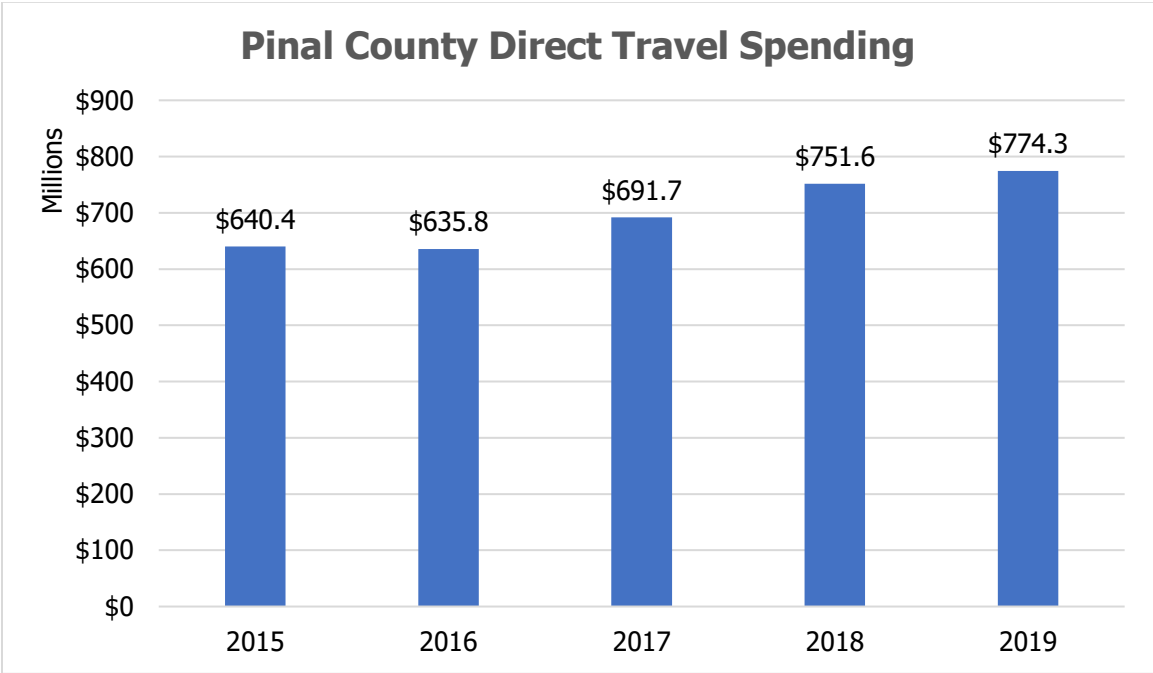
Gila County Travel Destination Spending (2019)



Note. Spending figures in millions of dollars. Source: Dean Runyon Associates, Arizona Office of Tourism, and US Economic Research

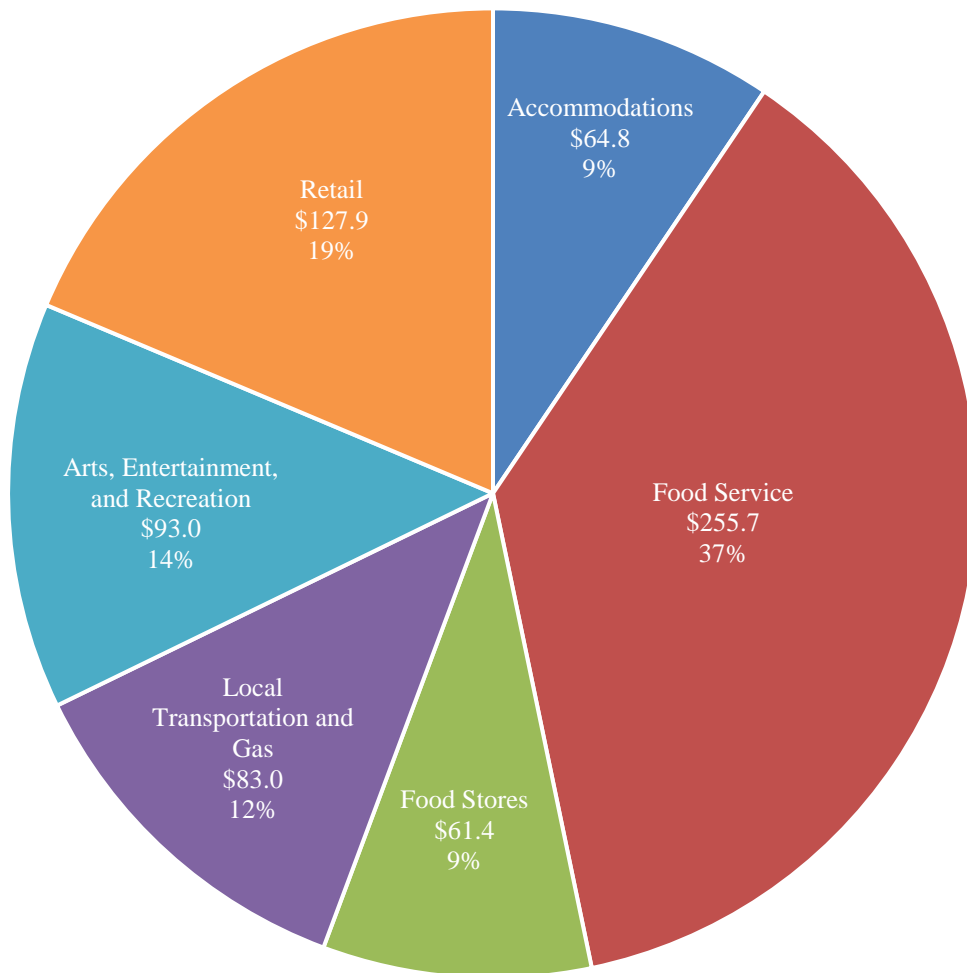
Pinal County. Major attractions in Pinal County include Aravaipa Canyon, Arizona Speedway and Central Arizona Speedway, Arizona Zipline Adventures, Biosphere 2, Boyce Thompson Arboretum State Park, Canyon Lake, Casa Grande Ruins National Monument, Coronado National Forest, Dwarf Car Museum, Florence Historic District, Goldfield Ghost Town and Museum, Harrah’s Ak-Chin Casino, Hohokam Pima National Monument, Ironwood Forest National Monument, Juan Bautista de Anza (National Historic Trail), Lost Dutchman State Park, McFarland State Historic Park, Neon Sign Park, Oracle State Park, Peralta Trail, Picacho Peak State Park, Poston Butte, Queen Creek Olive Mill, Ray Cooper and San Manuel mines, Rooster Cogburn Ostrich Ranch, Sonoran Desert National Monument, Superstition Mountains, Saint Anthony’s Greek Orthodox Monastery, Skydive Arizona, Tom Mix Memorial, Tonto National Forest, Tonto National Park Cliff Dwelling, and West Pinal Park.

According to Dean Runyon Associates, direct travel spending in Pinal County increased steadily from 2016 through 2019. In 2019, travel spending in Pinal County totaled \$774.3 million (up 3% from 2018 and 21.8% from 2016). In 2019, spending for food service accounted for the largest share of visitor destination spending in Pinal County at 37%, followed by retail at 19% and arts, entertainment, and recreation at 14%.



Source: Dean Runyon Associates, Arizona Office of Tourism, and US Economic Research

Pinal County Travel Destination Spending (2019)



Note. Spending figures in millions of dollars. Source: Dean Runyon Associates, Arizona Office of Tourism, and US Economic Research

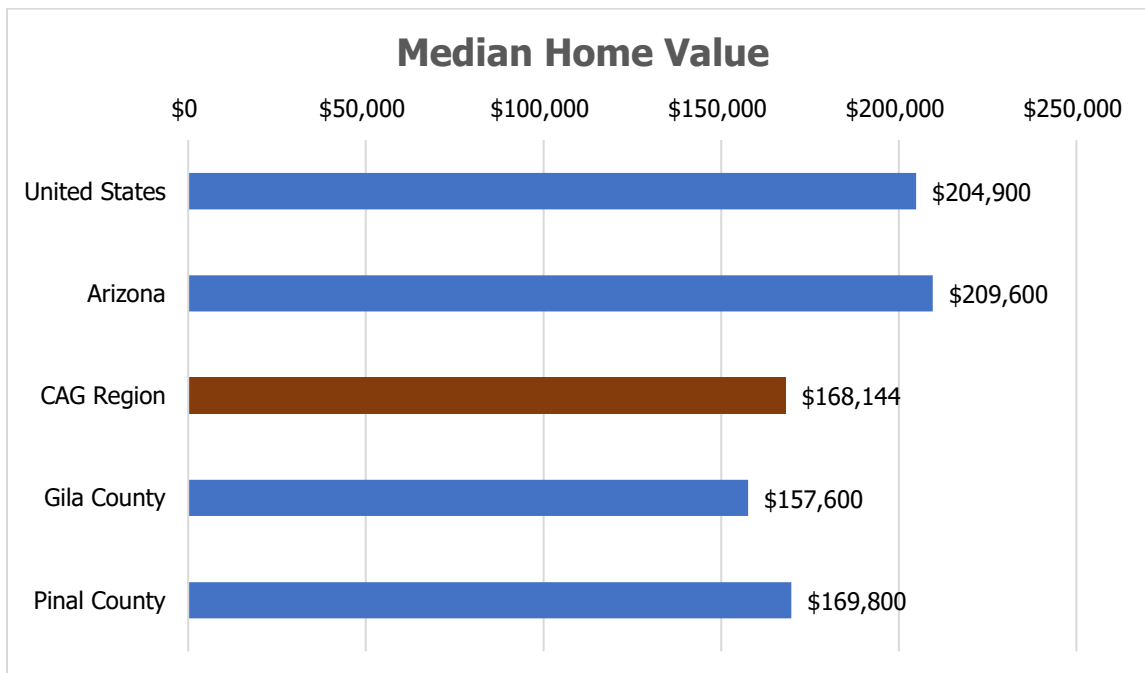
Housing

Home Values. The median home value in the CAG region is \$168,144 (nearly 18% below nationwide and 20% below the statewide median home value), as of the 2014-2018 American Community Survey. The region’s median home value is largely determined by higher values in Pinal County, which accounts for more than 86% of the region’s owner-occupied homes. The median home value in Gila County is lower at \$157,600, about 23% below nationwide and 25% lower than the statewide median home value.

Home Affordability. Despite substantially lower home values, home ownership is less affordable in the CAG region than statewide and nationwide. As of the most recent 5-year period (2014-2018), 29.6% of homeowners with a mortgage pay 30% or more of their income

toward housing (compared to 28.5% of homeowners statewide and 28.7% of homeowners nationwide). Within the CAG region, housing is considerably less affordable in Gila County where more than a third of homeowners pay 30% or more of their income for housing.

Home Ownership. Within the CAG region, the homeownership rate of 74.3% (2014-2018) is considerably higher than statewide (63.6%) and nationally (63.8%). From the 2009-2013 to the 2014-2018 American Community Survey, homeownership rates declined nationwide, statewide, and in the CAG region. Gila County saw a steeper drop than regionwide, statewide, and nationwide, with home ownership falling from 75.8% to 73.9%. Despite the decline, home ownership remained considerably higher in Gila County (and regionwide) than statewide and nationwide rates.

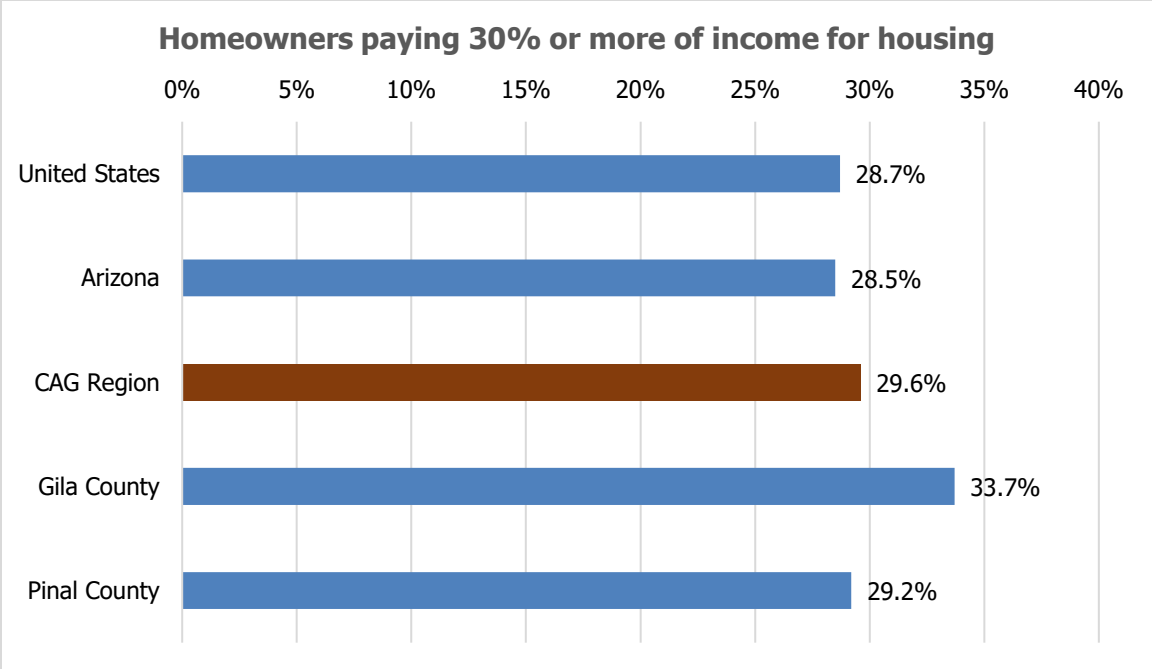


Note. Figures expressed in 2018 dollars. CAG region estimate is a weighted-average of county median prices. Source: U.S. Census Bureau (2014-2018 American Community Survey 5-year Estimates) and US Economic Research

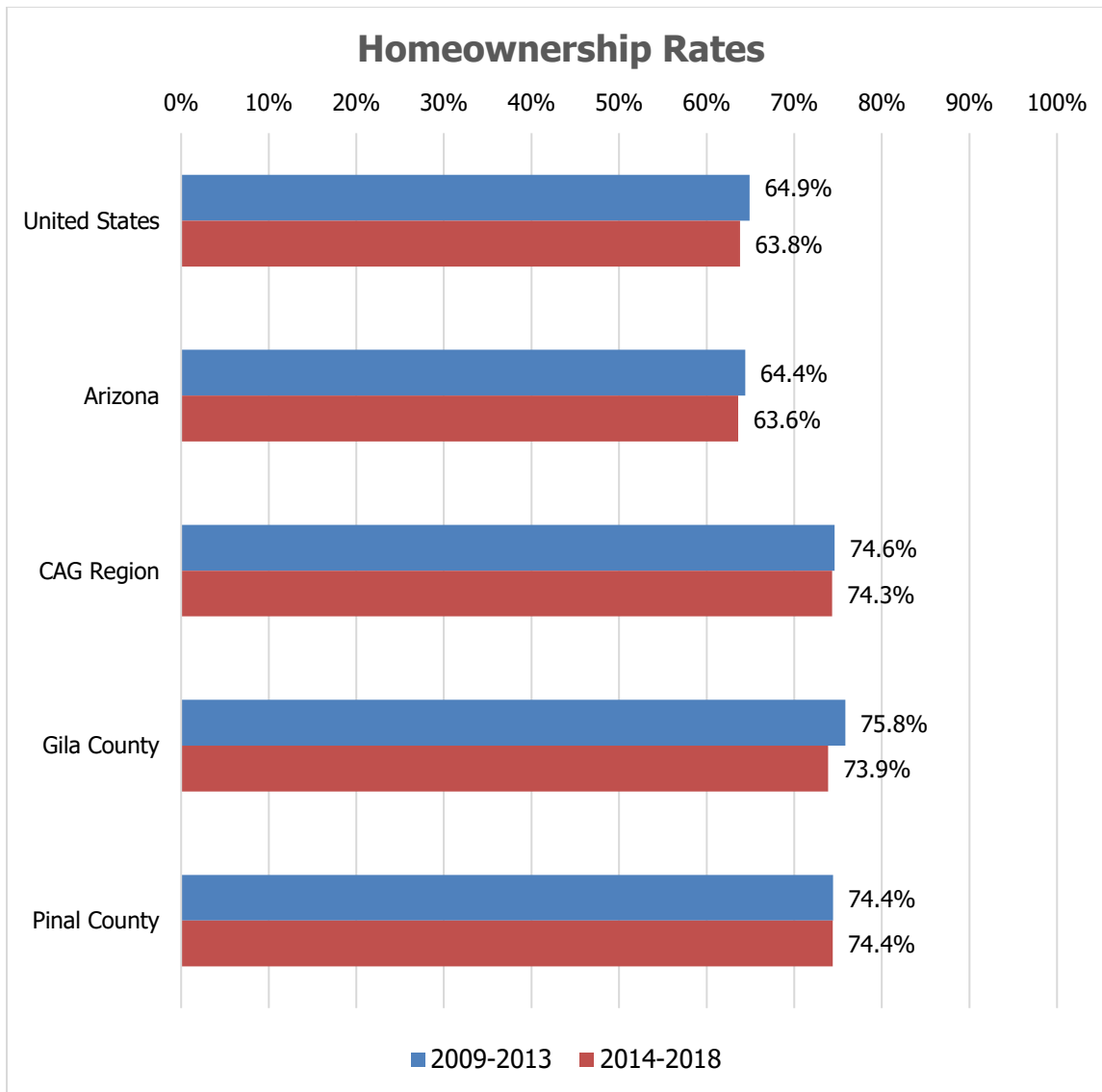
Monthly Homeowner Housing Costs as a Percentage of Household Income

% of Income	United States	Arizona	CAG Region	Gila County	Pinal County
Less than 20%	44.8%	45.7%	43.9%	38.2%	44.6%
20% to 24.9%	15.8%	15.6%	16.2%	17.6%	16.0%
25% to 29.9%	10.7%	10.2%	10.2%	10.4%	10.2%
30% to 34.9%	7.1%	6.8%	7.2%	7.5%	7.2%
35% or more	21.6%	21.7%	22.4%	26.2%	22.0%

Note. Includes only owner-occupied homes with a mortgage. Source: U.S. Census Bureau (2014-2018 American Community Survey 5-year Estimates) and US Economic Research



Note. Includes only owner-occupied homes with a mortgage. Source: U.S. Census Bureau (2014-2018 American Community Survey 5-year Estimates) and US Economic Research



Source: U.S. Census Bureau (2009-2013 American Community Survey 5-year Estimates and 2014-2018 American Community Survey 5-year Estimates) and US Economic Research

Population

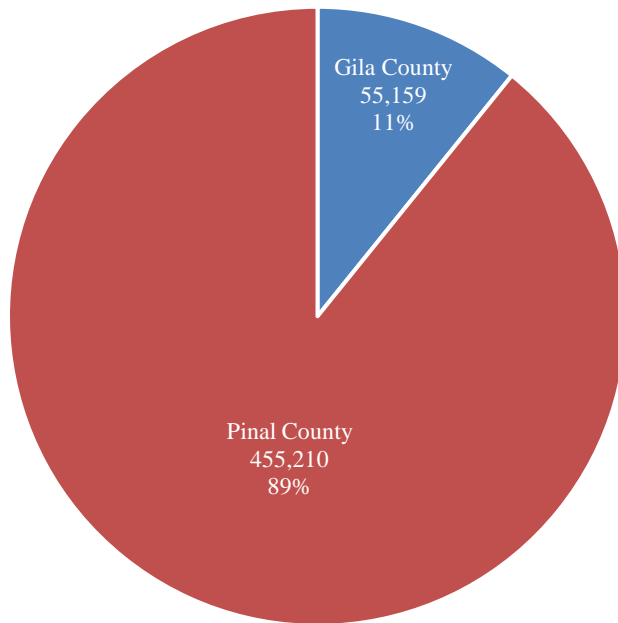
Estimates. The population of the CAG region is 510,369 as of 2019, according to estimates by Arizona Office of Economic Opportunity. A large majority of the regional population (89%) resides in Pinal County, with Gila County accounting for the remaining 11%.

CAG’s population centers are located along major transportation routes within the region. The Interstate-10 corridor in western Pinal County provides the majority of the urban development within the region. CAG’s two largest communities, Casa Grande and Maricopa, lie within a short distance of Interstate-10. The other regional population centers of significance include Apache Junction, Payson, Globe-Miami, and an unincorporated portion of Pinal County called San Tan Valley.

From 2010 to 2019, the region's population grew by 18.7%—well ahead of the statewide rate of growth of 12.3% during the same period. The strong regional population growth was driven by Pinal County, which saw its population increase by 20.9% from 2010 to 2019. During the same period, the Gila County population grew by just 3%, well below regional and state levels. The Town of Queen Creek (located in Pinal and Maricopa counties) saw the fastest population growth rate in the region, with the share of the population residing in Pinal County increasing from 450 to 6,867 for growth of more than 1,400%. All municipalities in Pinal County saw population growth from 2010 to 2019, with the city of Maricopa adding the largest number of new residents at 11,193 (25.7%). Casa Grande added the second highest number of new residents at 8,298 (17.1%), followed by the portion of Queen Creek located in Pinal County, which added 6,417 new residents. In Gila County, the municipalities of Globe, Hayden and Miami all saw population declines from 2010 to 2019, with Hayden seeing the steepest drop at 2.9% (Globe and Miami populations fell by 0.3% and 1.0%, respectively). The strongest population growth in Gila County was its largest city Payson, which added 898 new residents, up 5.9% from 2010 to 2019.

Projections. The region's population is projected to grow at nearly double the rate statewide in the short term (2019-2025) and more than triple the statewide rate over the long term (2019-2055). From 2019 to 2025, the region's population is projected to grow by 15.7% (compared to Arizona's projected growth rate of 8.4%). Over the longer term, from 2019 to 2055, the CAG region is projected to grow by 141.9% (compared to 46.1% for all of Arizona). The strong regional population growth in both the short- and long-term is expected to be led by Pinal County, which is projected to grow by 17.5% from 2019 to 2025 and 159.4% from 2019 to 2055 (compared to growth of just 0.4% for Gila County in the short term and a projected population decline of 3.4% out to 2055).

CAG Region Population (2019)



Source: Arizona Office of Economic Opportunity and US Economic Research

Population Estimates and Projections

	Arizona	CAG Region	Gila County	Pinal County
2019	7,189,020	510,369	55,159	455,210
2025	7,791,810	590,409	55,395	535,014
2035	8,777,552	767,957	55,065	712,892
2045	9,682,306	989,303	54,111	935,192
2055	10,504,530	1,234,342	53,309	1,181,033

Source: Arizona Office of Economic Opportunity and US Economic Research

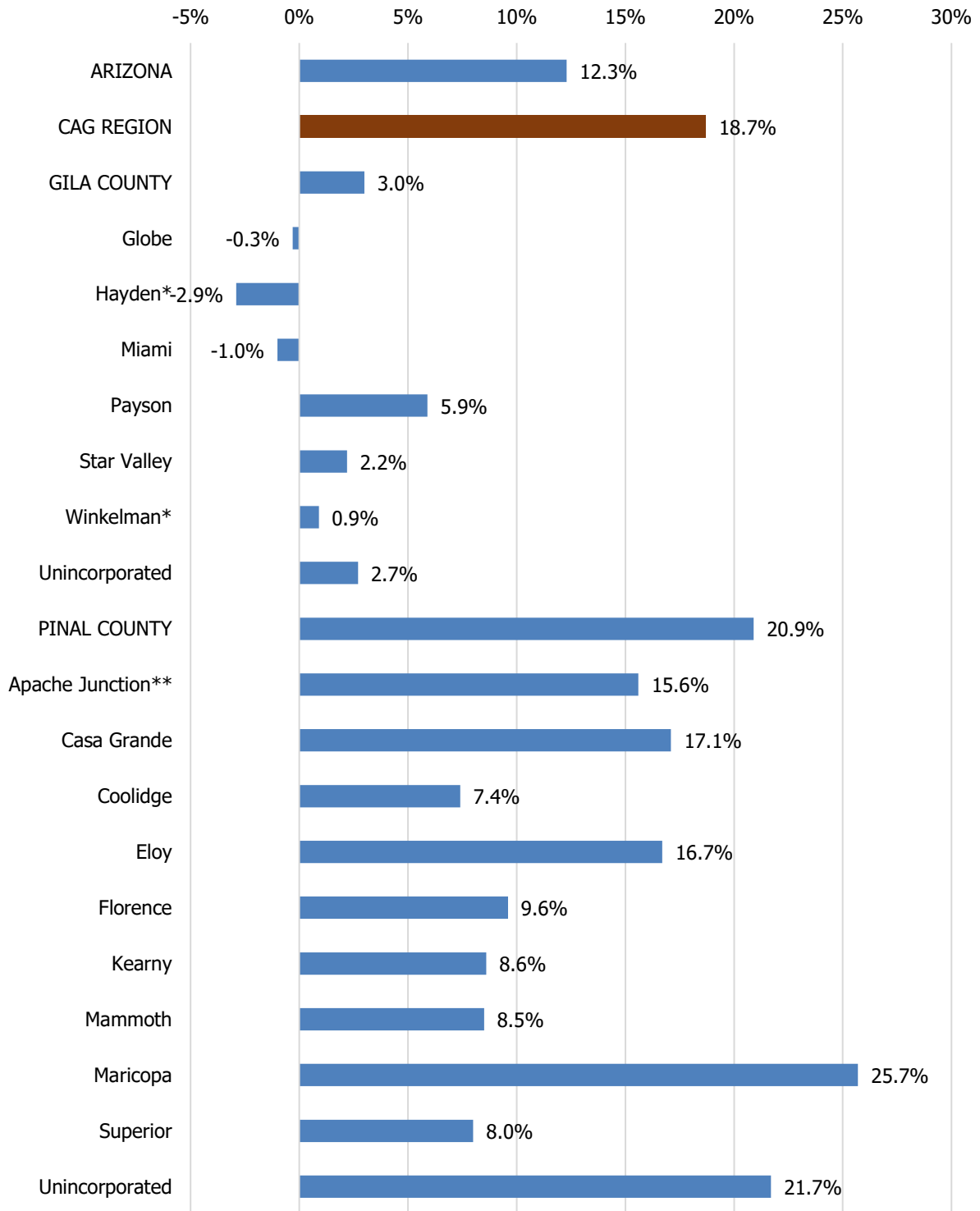
Population Growth (2010 to 2019)

	2019	2010	Growth	Growth %
ARIZONA	7,189,020	6,401,568	787,452	12.3%
CAG REGION	510,369	429,934	80,435	18.7%
GILA COUNTY	55,159	53,565	1,594	3.0%
Globe	7,514	7,533	-19	-0.3%
Hayden*	644	663	-19	-2.9%
Miami	1,815	1,834	-19	-1.0%
Payson	16,168	15,270	898	5.9%
Star Valley	2,353	2,303	50	2.2%
Winkelman*	355	352	3	0.9%
Unincorporated	26,310	25,610	700	2.7%
PINAL COUNTY	455,210	376,369	78,841	20.9%
Apache Junction**	41,066	35,534	5,532	15.6%
Casa Grande	56,962	48,664	8,298	17.1%
Coolidge	12,734	11,855	879	7.4%
Eloy	19,438	16,657	2,781	16.7%
Florence	27,980	25,537	2,443	9.6%
Kearny	2,115	1,947	168	8.6%
Mammoth	1,546	1,425	121	8.5%
Maricopa	54,791	43,598	11,193	25.7%
Queen Creek**	6,867	450	6,417	1,426.0%
Superior	3,063	2,835	228	8.0%
Unincorporated	228,648	187,867	40,781	21.7%

* Located in Gila and Pinal counties. ** Located in Pinal and Maricopa counties.

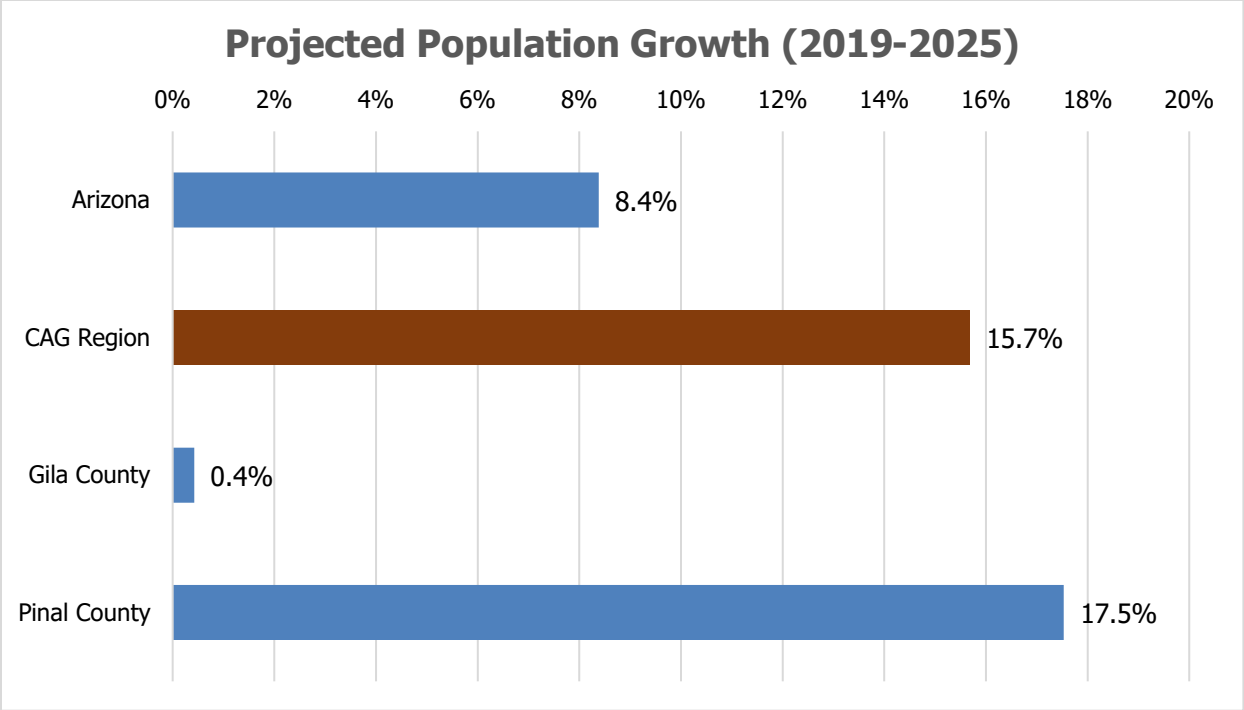
Source: Arizona Office of Economic Opportunity and US Economic Research

Population Growth (2010-2019)

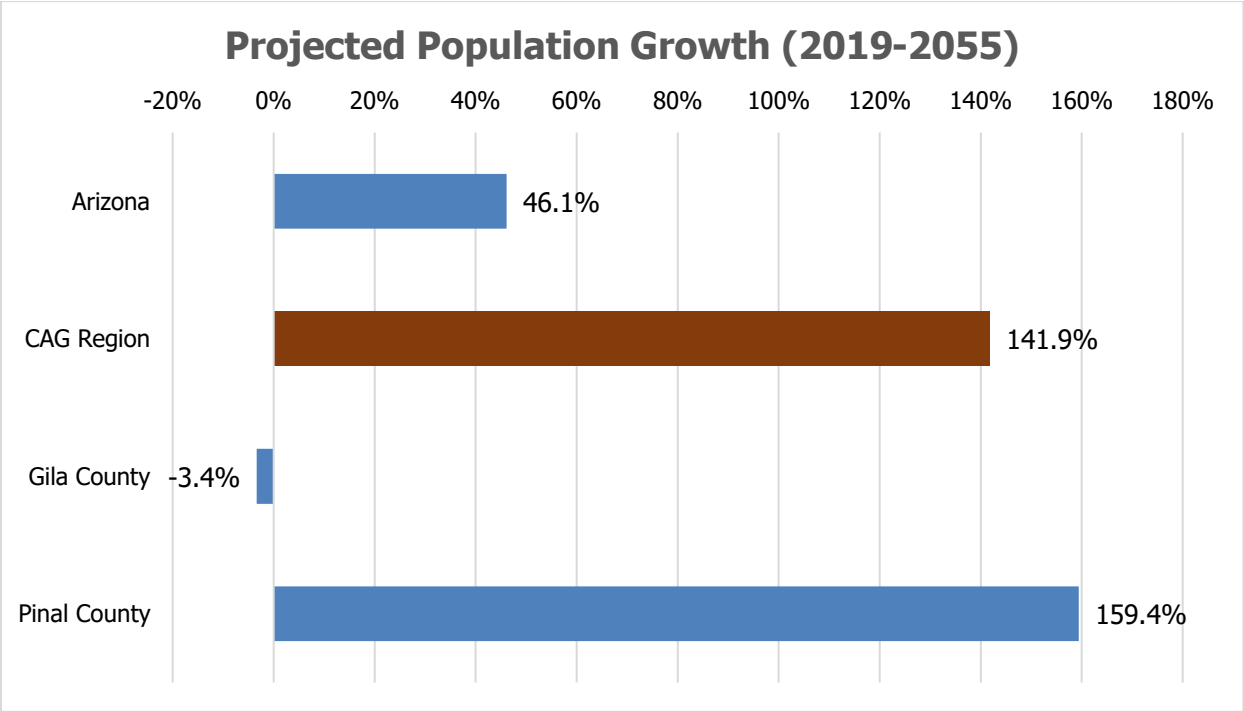


Note. Queen Creek (not shown) in Pinal County grew from 450 to 6,867 from 2010 to 2019 (an increase of 1,426%). * Located in Gila and Pinal counties. ** Located in Pinal and Maricopa counties.

Source: Arizona Office of Economic Opportunity and US Economic Research



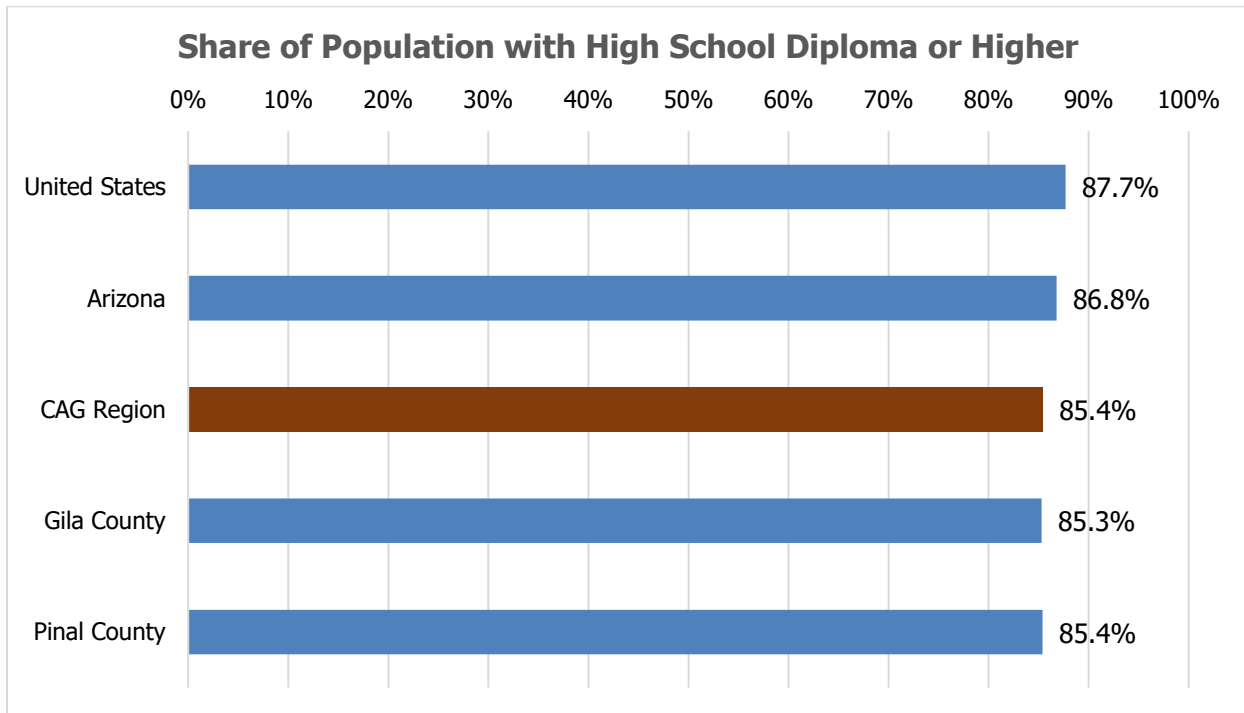
Source: Arizona Office of Economic Opportunity and US Economic Research



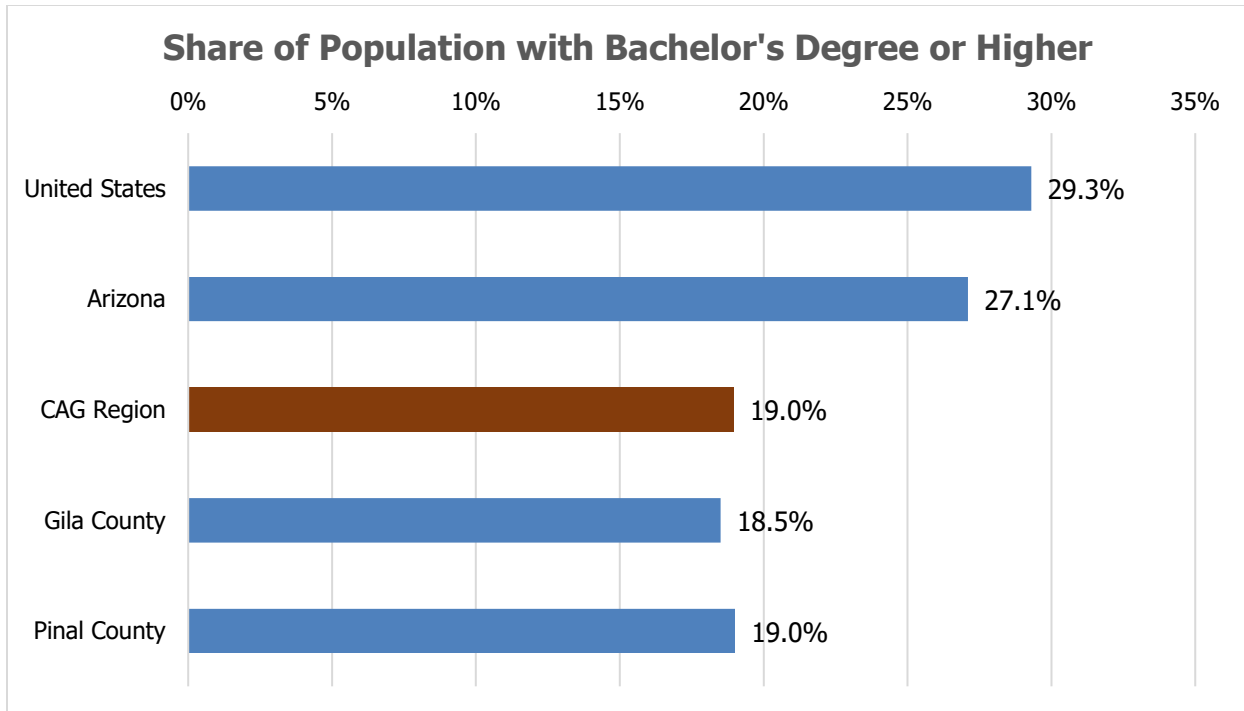
Source: Arizona Office of Economic Opportunity and US Economic Research

Educational Attainment

Educational attainment levels in the CAG region are lower than statewide and nationwide at both the high-school-diploma-and-above and the bachelor's-degree-and-above levels. Regionwide, 85.4% of the population ages 25 and older have earned a high school diploma (or equivalent) or higher (compared to 86.8% statewide and 87.7% nationwide) as of the 2014-2018 American Community Survey. At the post-secondary level, the difference is much larger with just 19% of the region's population ages 25 and up having earned a bachelor's degree or higher (compared to 27.1% statewide and 29.3% nationwide).



Note. Population ages 25 and older. Source: U.S. Census Bureau (2014-2018 American Community Survey 5-year Estimates) and US Economic Research



Note. Population ages 25 and older. Source: U.S. Census Bureau (2014-2018 American Community Survey 5-year Estimates) and US Economic Research

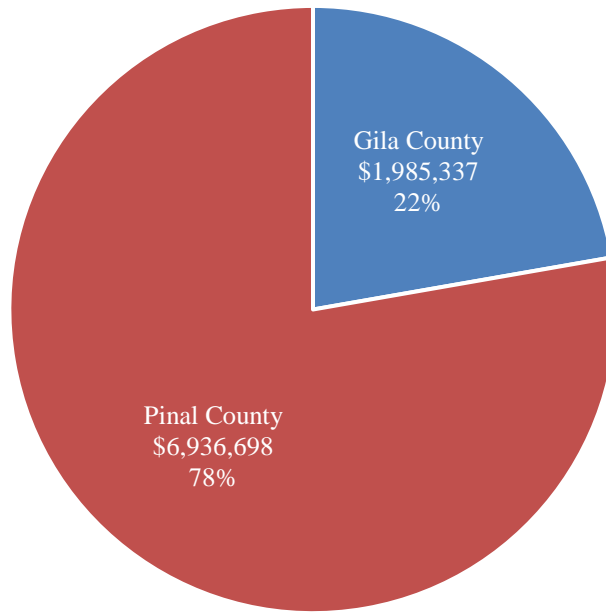
There are several institutions of higher learning within the CAG region. The Central Arizona College has five campuses and three centers throughout Pinal County, providing opportunities for Associate’s Degrees and certificates in business, science, and the arts. Gila Community College, in partnership with Eastern Arizona College, has three campuses throughout Gila County and also provides Associate’s Degrees in business, science, and the arts. Each community college provides partnerships with Arizona universities for Bachelor’s Degree tracks.

The University of Arizona in Tucson lies to the south of the CAG Region, while Arizona State University lies to the northwest in the City of Tempe. Both universities are large, offering a myriad of programs and degrees, and allowing the regional workforce to become trained in a variety of fields. There are also a variety of for-profit and religious institutions within close proximity to the CAG Region. All of these options provide a strong network for workforce training within the region.

Gross Domestic Product

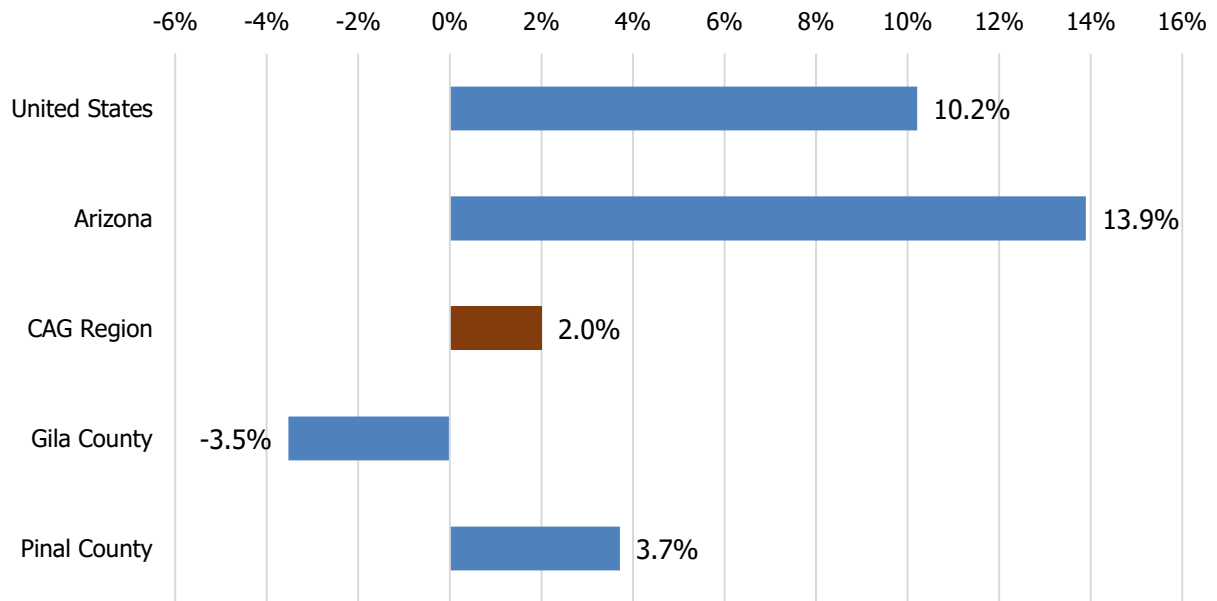
Real GDP. Real (i.e., inflation-adjusted) GDP in the CAG region totaled \$8.9 billion in 2018 (in 2012 chained dollars) with the larger share (78%) produced in Pinal County. Gila County accounted for 22% of regional GDP in 2018. From 2014 to 2018, regional real GDP grew by just 2% (considerably trailing statewide GDP growth of 13.9% during the same period). Regional GDP was pulled down by Gila County, which saw real GDP fall by 3.5% from 2014 to 2018. Pinal County GDP grew by 3.7% during the same period—still substantially lower than the statewide and national rates of economic growth.

CAG Region GDP (2018)

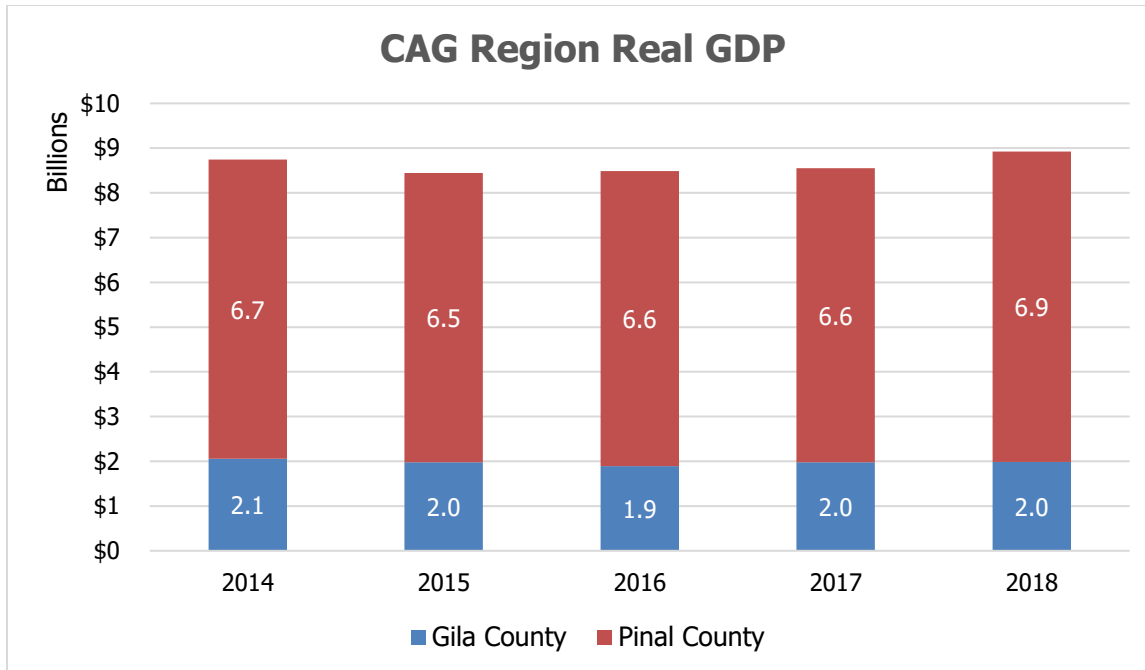


Note. Thousands of chained 2012 dollars. Source: U.S. Bureau of Economic Analysis and US Economic Research

Real GDP Growth (2014 to 2018)



Note. Growth based on chained 2012 dollars. Source: U.S. Bureau of Economic Analysis and US Economic Research



Note. Chained 2012 dollars. Source: U.S. Bureau of Economic Analysis and US Economic Research

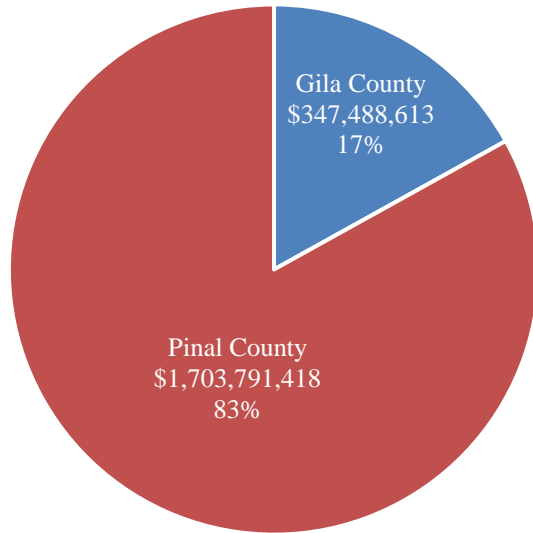
Trade and Commerce

Retail. Retail sales in the CAG region totaled \$2.1 billion in 2019 with 83% occurring in Pinal County. Gila County accounted for the remaining 17%. From 2015 to 2019, regional retail sales grew by 23.4% (well ahead of the statewide rate of growth of 21.1% during the same period). Gila County saw slower growth at 16.7% from 2015 to 2019, well behind regional and statewide levels. Pinal County saw a 24.9% gain in retail sales over the five-year period.

Restaurant and Bar. Restaurant and bar taxable sales in the CAG region totaled \$474.6 million in 2019 with 82% occurring in Pinal County. Gila County accounted for the remaining 18%. From 2015 to 2019, regional restaurant and bar sales grew by 32.8% (well ahead of the statewide rate of growth of 27.9% during the same period). Gila County saw slower growth at 26.4% from 2015 to 2019, trailing regional and statewide levels. Pinal County saw a 34.3% gain in restaurant and bar sales over the five-year period.

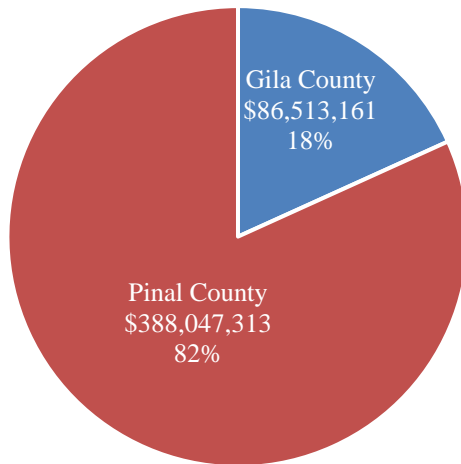
Hotel and Motel. Hotel and motel taxable sales (stays of less than 30 days) in the CAG region totaled \$55 million in 2019 with 62% occurring in Pinal County and 38% in Gila County. From 2015 to 2019, regional hotel and motel receipts grew by 51.9% (well ahead of the statewide rate of growth of 36.7% during the same period). Gila County saw slightly slower growth at 51.4% from 2015 to 2019 while Pinal County saw a 52.3% gain in hotel and motel receipts over the five-year period.

CAG Region Retail Sales (2019)



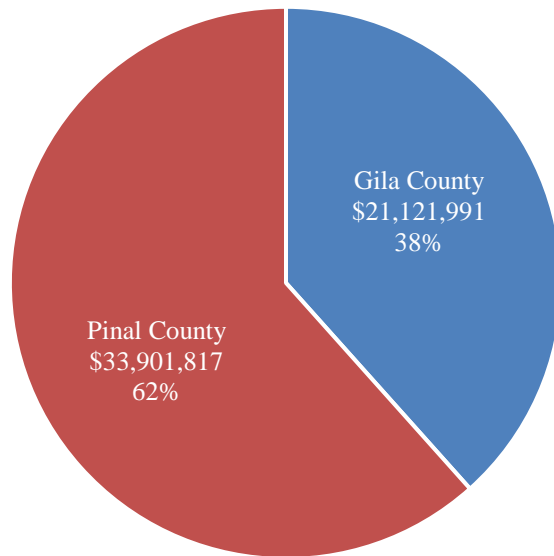
Source: Arizona Department of Revenue and US Economic Research

CAG Region Restaurant & Bar Sales (2019)



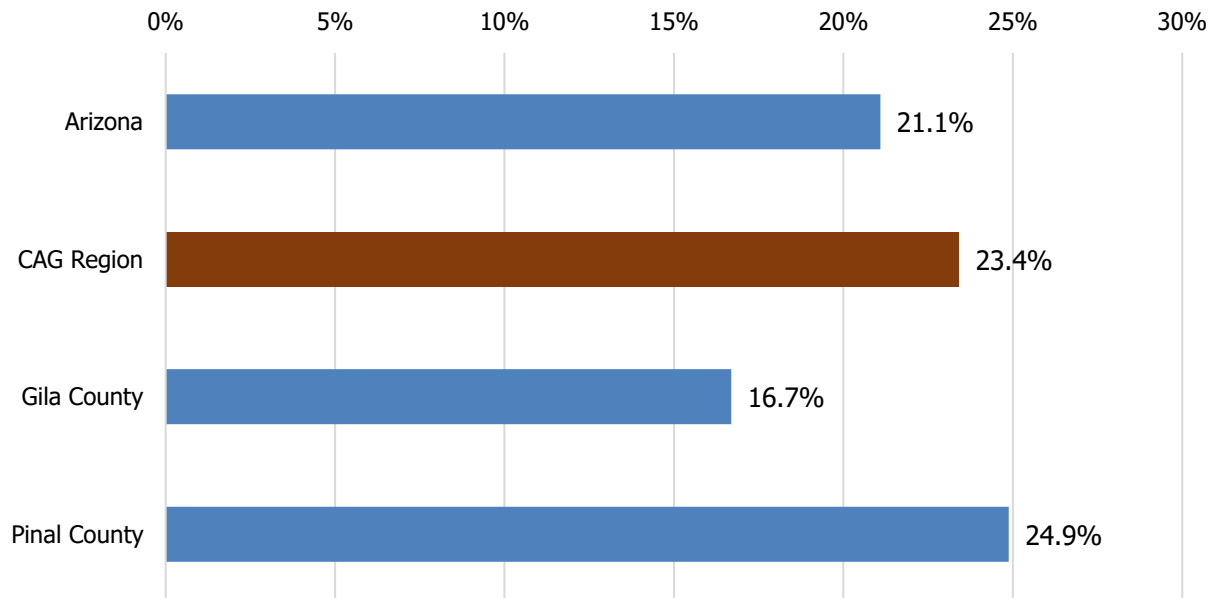
Source: Arizona Department of Revenue and US Economic Research

CAG Region Hotel/Motel Taxable Sales (2019)

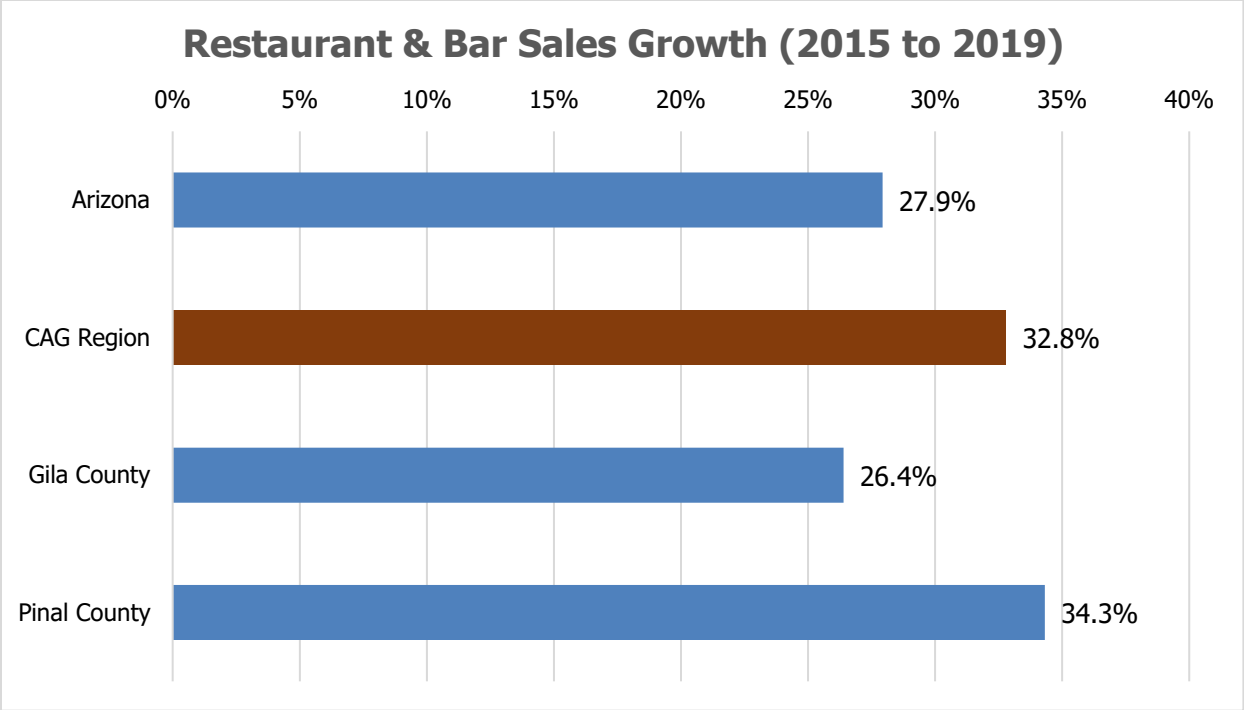


Source: Arizona Department of Revenue and US Economic Research

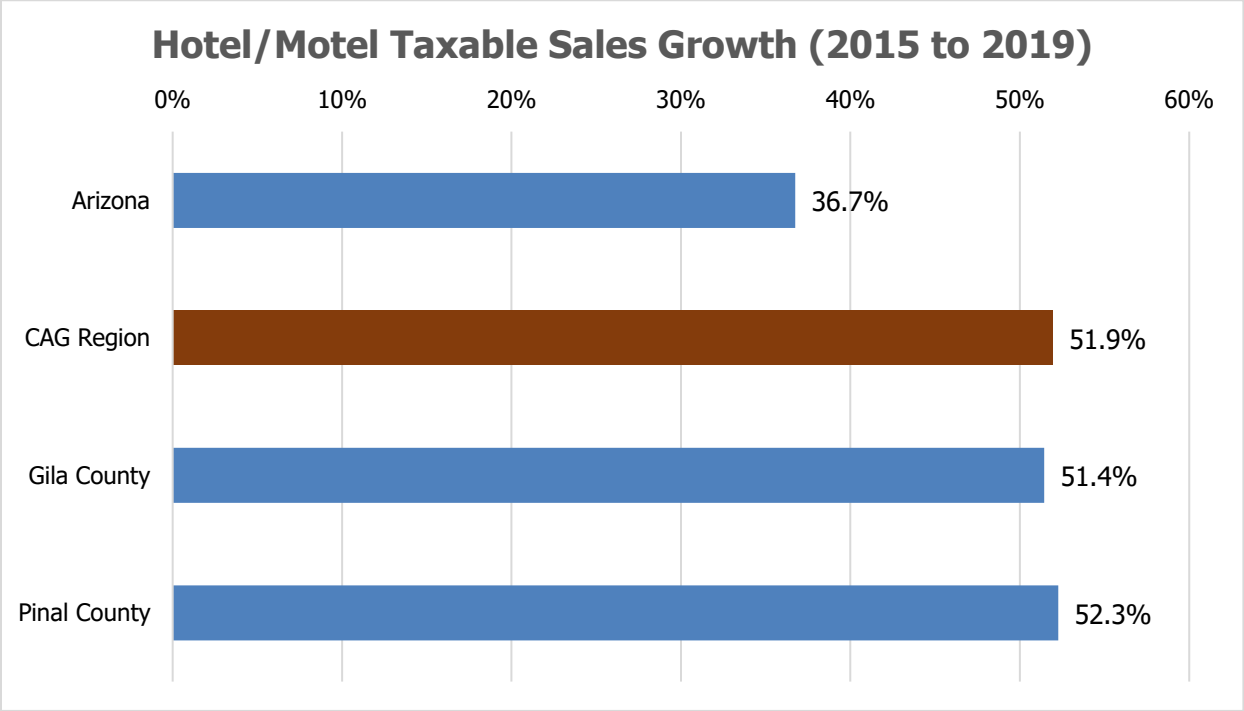
Retail Sales Growth (2015 to 2019)



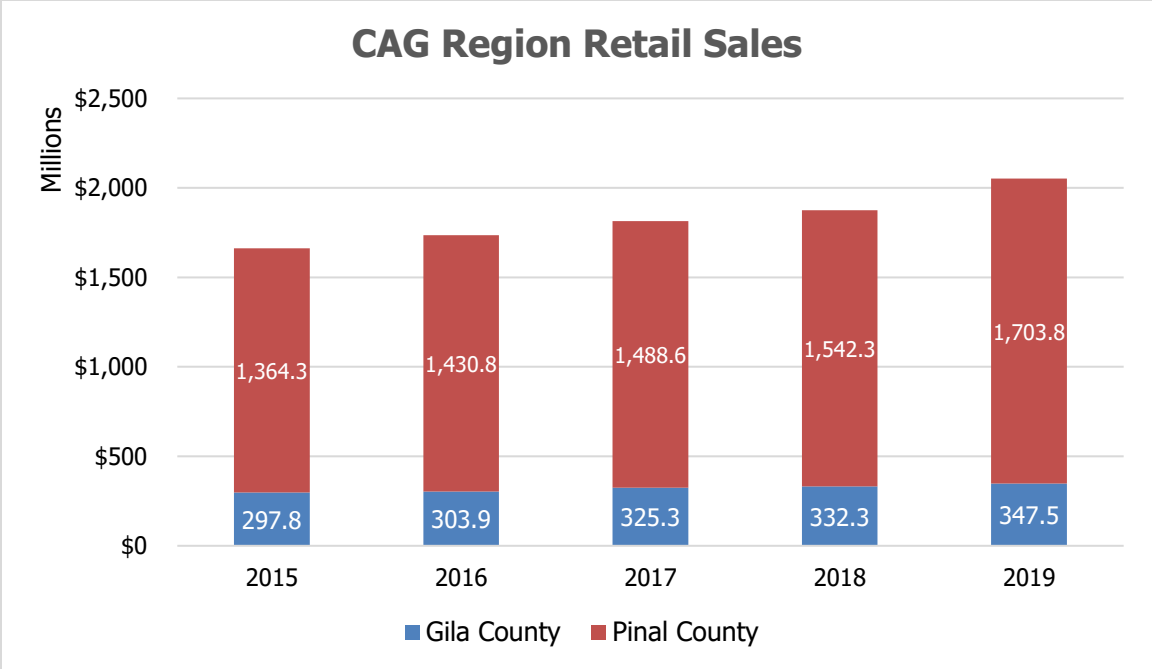
Source: Arizona Department of Revenue and US Economic Research



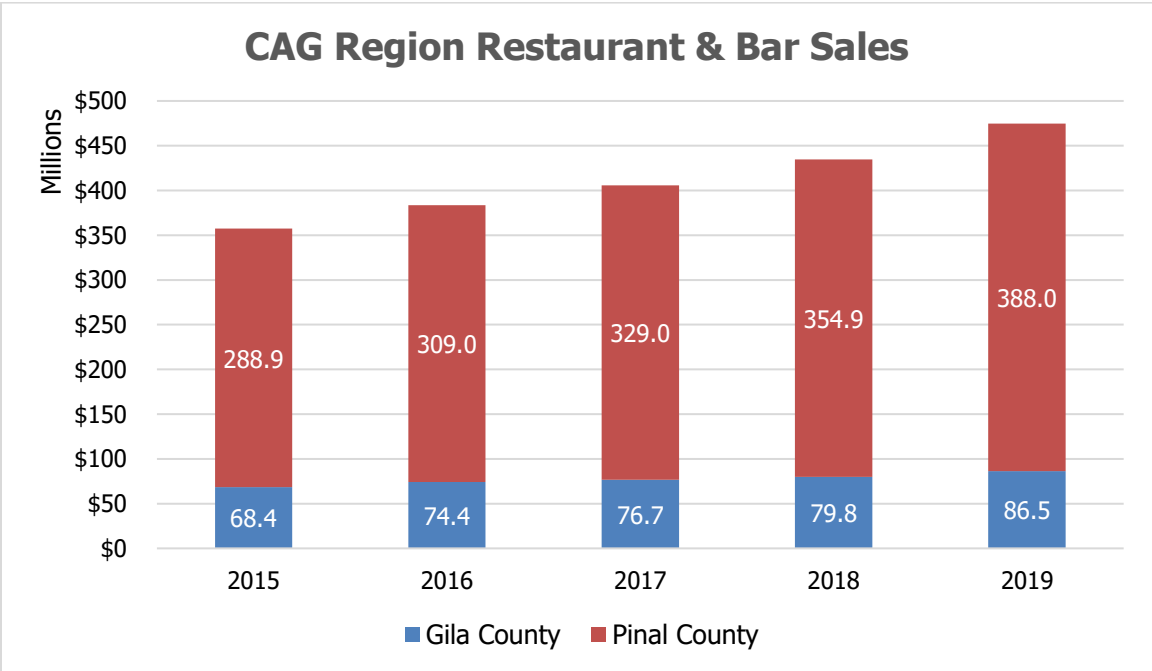
Source: Arizona Department of Revenue and US Economic Research



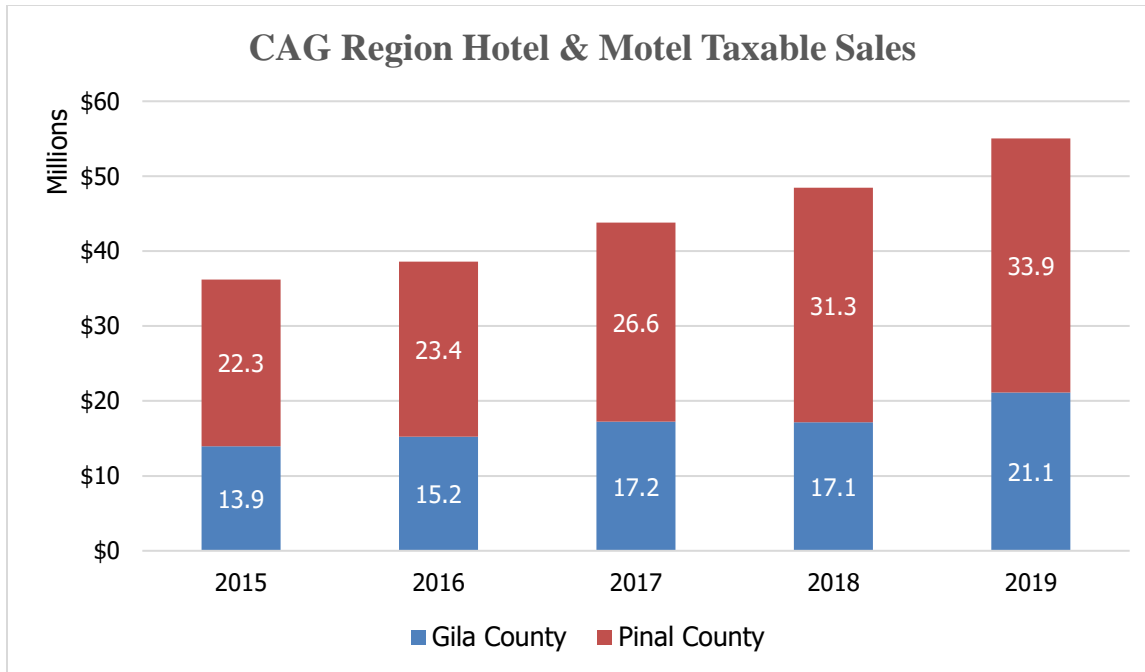
Source: Arizona Department of Revenue and US Economic Research



Source: Arizona Department of Revenue and US Economic Research



Source: Arizona Department of Revenue and US Economic Research



Source: Arizona Department of Revenue and US Economic Research

Retail Sales

	2015	2016	2017	2018	2019
Arizona	\$60,861,931,664	\$62,631,438,566	\$65,332,460,008	\$69,745,200,290	\$73,698,519,574
CAG Region	\$1,662,126,604	\$1,734,702,016	\$1,813,895,467	\$1,874,680,293	\$2,051,280,031
Gila County	\$297,790,229	\$303,888,998	\$325,288,170	\$332,339,681	\$347,488,613
Pinal County	\$1,364,336,375	\$1,430,813,018	\$1,488,607,297	\$1,542,340,612	\$1,703,791,418

Source: Arizona Department of Revenue and US Economic Research

Restaurant and Bar Sales

	2015	2016	2017	2018	2019
Arizona	\$12,324,144,356	\$13,141,373,774	\$13,912,783,201	\$14,794,857,763	\$15,766,594,997
CAG Region	\$357,351,606	\$383,335,502	\$405,651,698	\$434,735,475	\$474,560,474
Gila County	\$68,444,716	\$74,350,933	\$76,656,959	\$79,823,134	\$86,513,161
Pinal County	\$288,906,890	\$308,984,569	\$328,994,739	\$354,912,341	\$388,047,313

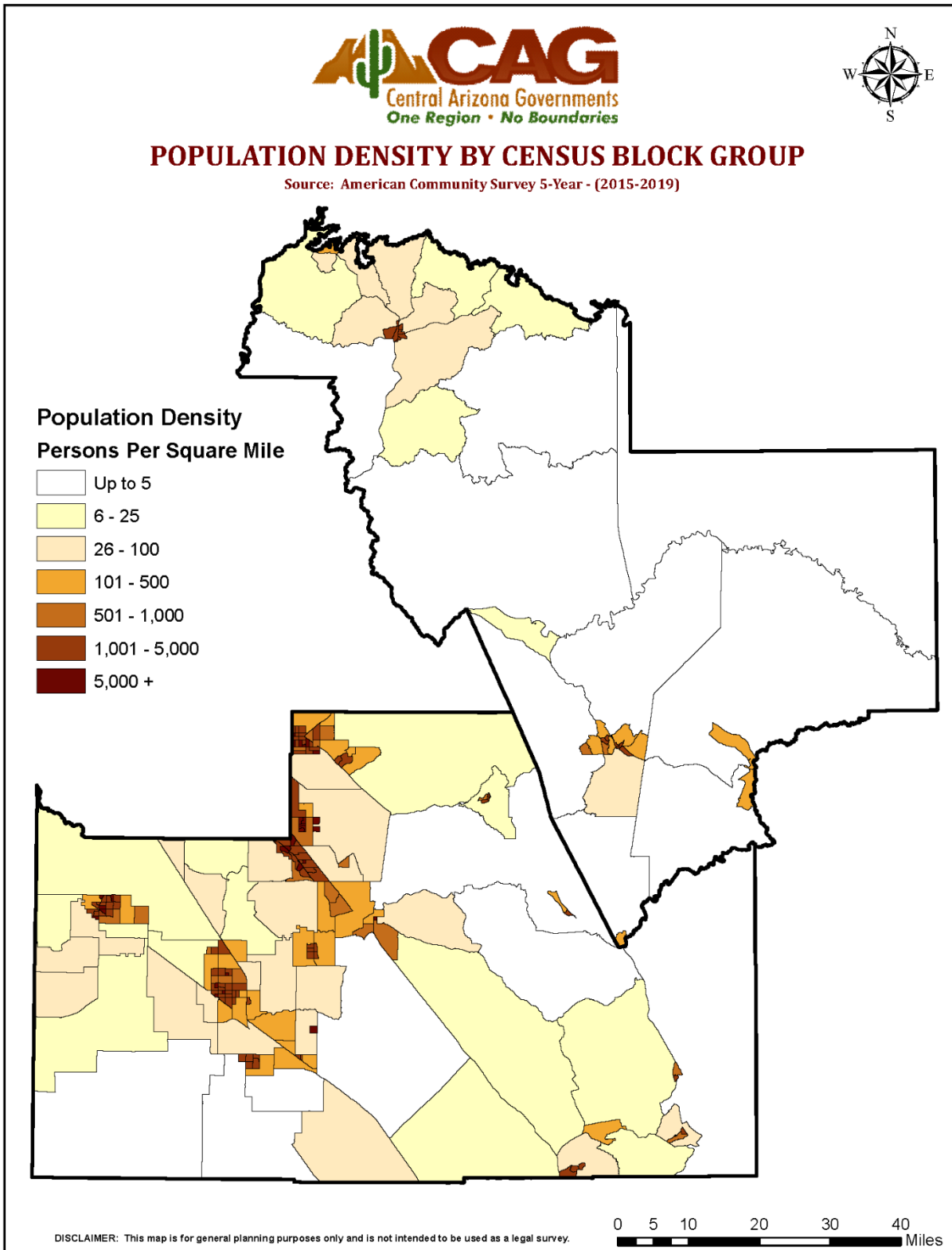
Source: Arizona Department of Revenue and US Economic Research

Hotel/Motel Taxable Sales

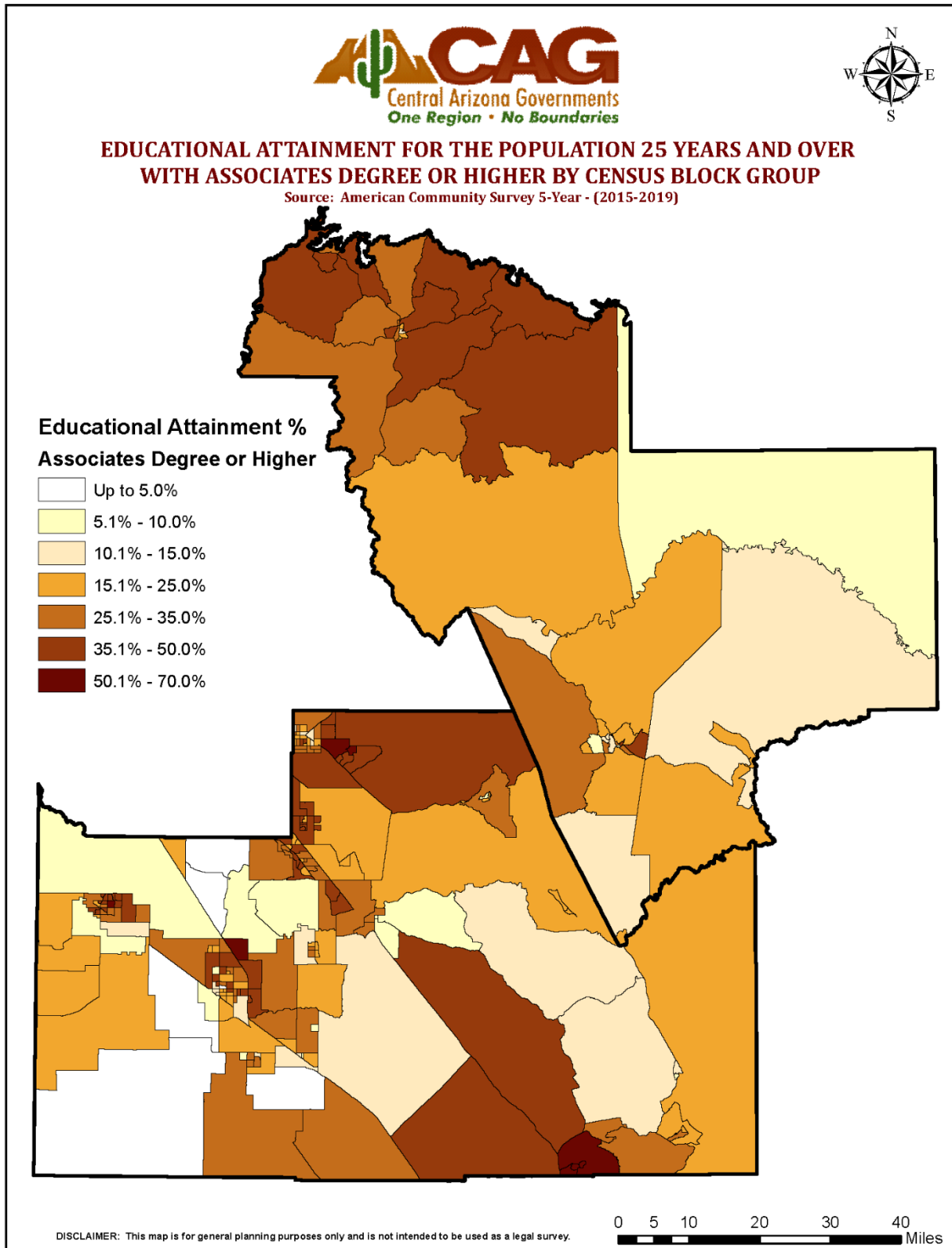
	2015	2016	2017	2018	2019
Arizona	\$2,776,669,934	\$2,913,671,369	\$3,168,862,893	\$3,497,341,641	\$3,796,916,376
CAG Region	\$36,213,515	\$38,616,340	\$43,785,173	\$48,482,125	\$55,023,808
Gila County	\$13,948,341	\$15,226,657	\$17,233,534	\$17,135,401	\$21,121,991
Pinal County	\$22,265,174	\$23,389,683	\$26,551,639	\$31,346,724	\$33,901,817

Source: Arizona Department of Revenue and US Economic Research

Map 3: Population Density



Map 4: Educational Attainment - College Degree



PHYSICAL CHARACTERISTICS

The CAG Region contains a total of 10,096 square miles. The region falls into three distinct elevations: low-lying desert in most of western Pinal County, steep hills and mountains in eastern Pinal County and southern Gila County, and a distinct physical break to higher elevations in northern Gila County (the Mogollon Rim). The CAG Region's physical characteristics directly affect its regional economic development. The Region has an exceptionally large geographic extent, which is further complicated by the variation in physical environment and land ownership. These combine to create distinct sub-regions throughout Gila and Pinal counties.

Further, there are variations in soil types that limit physical development in large portions of the Region. In general, there are more developable soils in the western portions of the CAG Region.

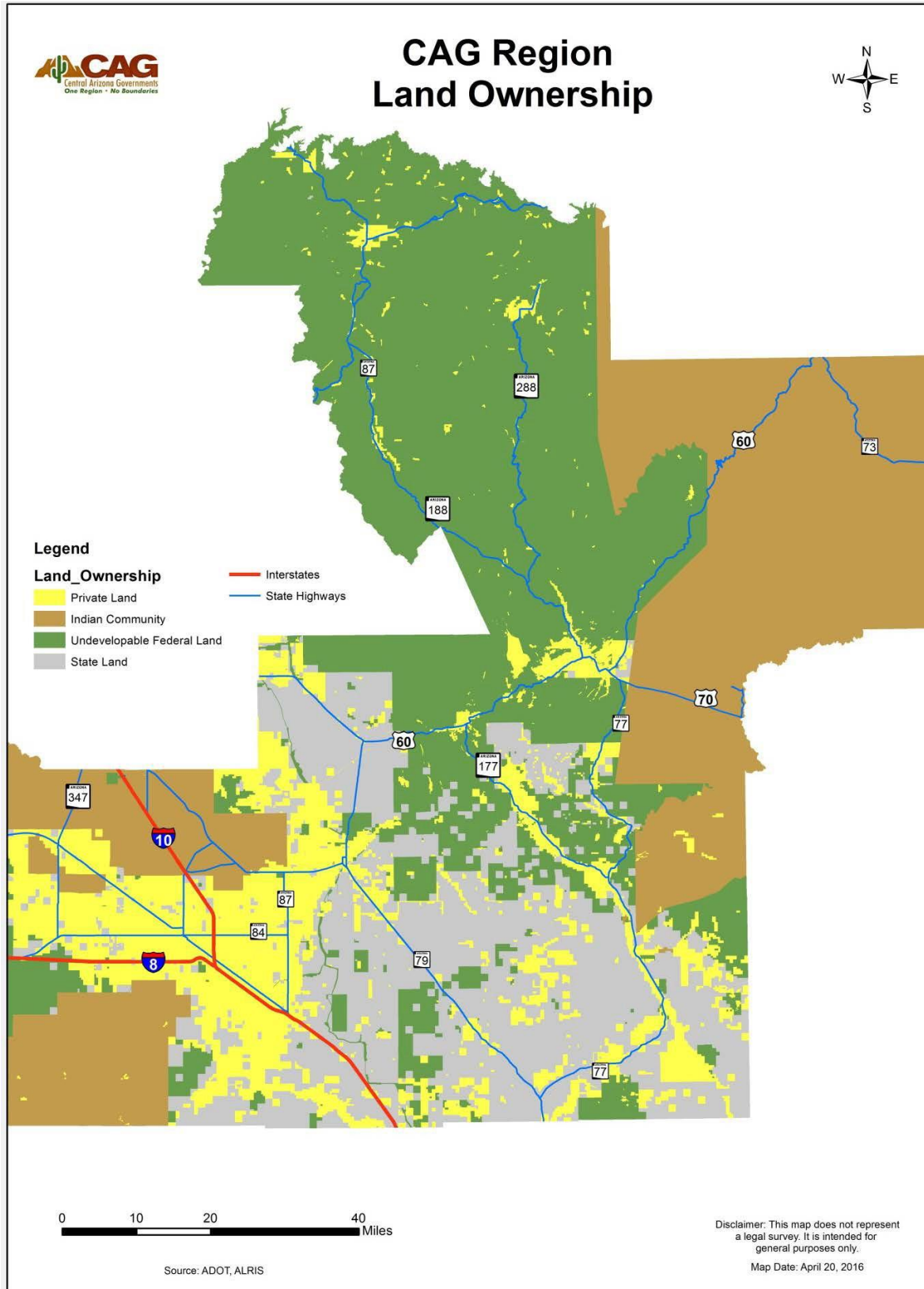
The majority of the southern portion of the region lies in the Basin and Range Province. This physiographic region is characterized by steep elevation changes and flat valleys. It covers much of the western United States and parts of Mexico (U.S. Geological Survey). This physiographic region is also associated with desert climates with associated flora and fauna.

The northern portion of the region lies within the physiographic region called the Arizona Transition Zone. This region serves as the bridge between the Basin and Range Province and the Colorado Plateau. The Arizona Transition Zone experiences a climb in elevation as it transitions into the Colorado Plateau (U.S. Geological Survey). The Mogollon Rim serves as the southern border of the Colorado Plateau, stretching for nearly 200 miles across eastern Arizona.

LAND OWNERSHIP

The pattern of land ownership is also a key contributing factor to the development of the region. Only 15 percent of the land in the region is privately owned, the other 85 percent is divided between Federal lands (37 percent); Native American Indian Communities (29 percent), and Arizona State Lands (19 percent). Opportunities for physical expansion for communities within eastern Pinal County and all of Gila County are limited, but opportunities still exist to improve the local economies and quality of life.

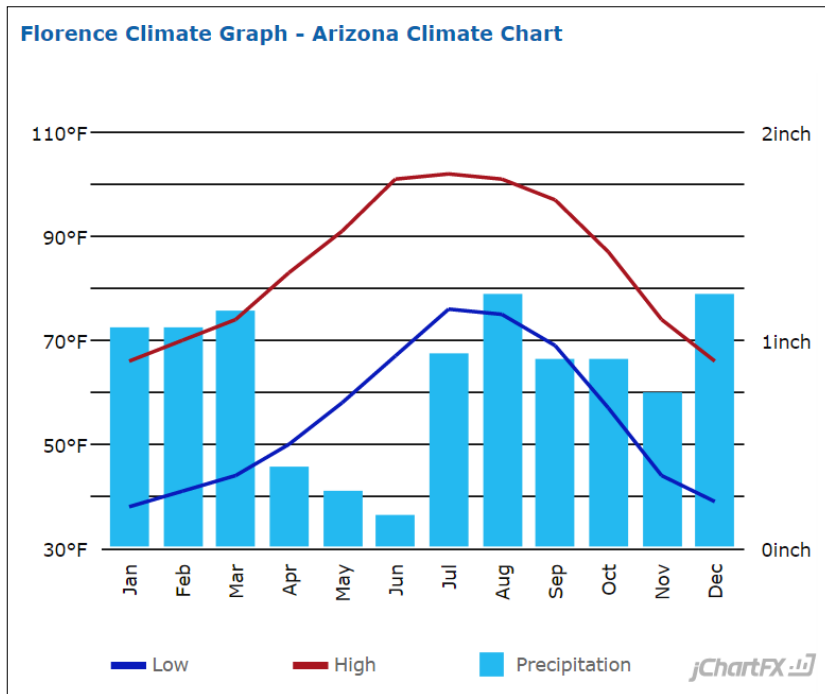
Map 4: Land Ownership



CLIMATE

The CAG Region is largely defined by low lying desert in the southwestern area, and the mountains to the north. Elevation plays a major role in central Arizona's climate, ranging from approximately 1,000 feet above sea level to nearly 8,000 feet. The county seat of Pinal County, the Town of Florence, averages 10 inches of rainfall per year. The average year-round high is 84 degrees Fahrenheit, and the average low is 55 degrees Fahrenheit. Summer averages climb to the low 100s during the day.

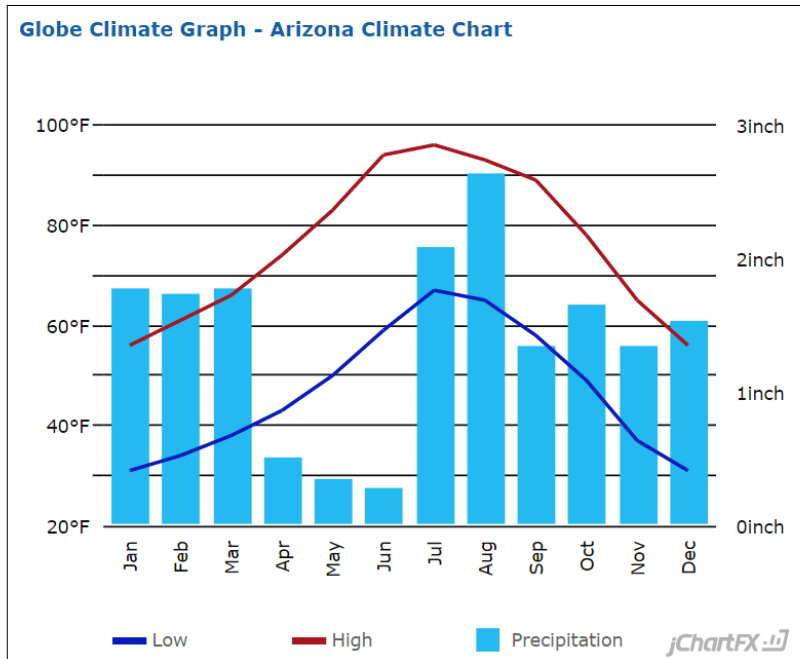
Figure 1: Pinal County Temperature and Precipitation



Source: usclimatedata.com

In contrast, the county seat of Gila County, the City of Globe, receives 17 inches of precipitation annually with average annual temperatures ranging between 47 and 76 degrees Fahrenheit. Northern Gila County experiences the coolest weather with average annual temperatures between 40 and 72 degrees, and precipitation at more than 21 inches. A portion of the precipitation comes in the form of snow, with February averaging the most snow at six inches.

Figure 2: Gila County Temperature and Precipitation



Source: usclimatedata.com

The climate of the CAG Region plays a major role in winter visitors living in the region during the winter, and also supports tourism.

NATURAL AND CULTURAL RESOURCES

The CAG Region hosts a large amount of natural and cultural resources that are important to the overall quality of life, and tourism potential of the region. The region is home to a portion of the Sonoran Desert which supports unique flora and fauna, including the saguaro cactus which can only be found in the southwestern U.S. Although private land ownership is limited in certain areas of the region, the vast amount of public lands provides opportunities for scenic views and outdoor recreation. The following is a list of Federal, state, and other open lands that contribute to the overall quality of life in the region:

- Sonoran Desert National Monument
- Tonto National Forest
- San Tan Mountain Regional Park
- Casa Grande Ruins National Monument
- Picacho Peak State Park
- Superstition Mountains
- Lost Dutchman State Park
- Tonto National Monument

These areas support a variety of activities ranging from hiking, bird watching, camping, and ATV trails, to other outdoor activities. Other natural amenities include the Gila River, Theodore Roosevelt Lake, and the many mountains that cover the regional landscape.

Cultural amenities are also abundant within the CAG Region. The Casa Grande Ruins host one of the largest prehistoric structures built in North America and attracts thousands of tourists each year. The area has also been defined by copper mining, being celebrated by some communities with an Ore Cart Trail where visitors can learn about copper as part of the region’s heritage. Native American heritage is also prevalent in the region, with many sites named after this heritage. Arizona has been inhabited for over 10,000 years, and there are many unique opportunities to look back in time.

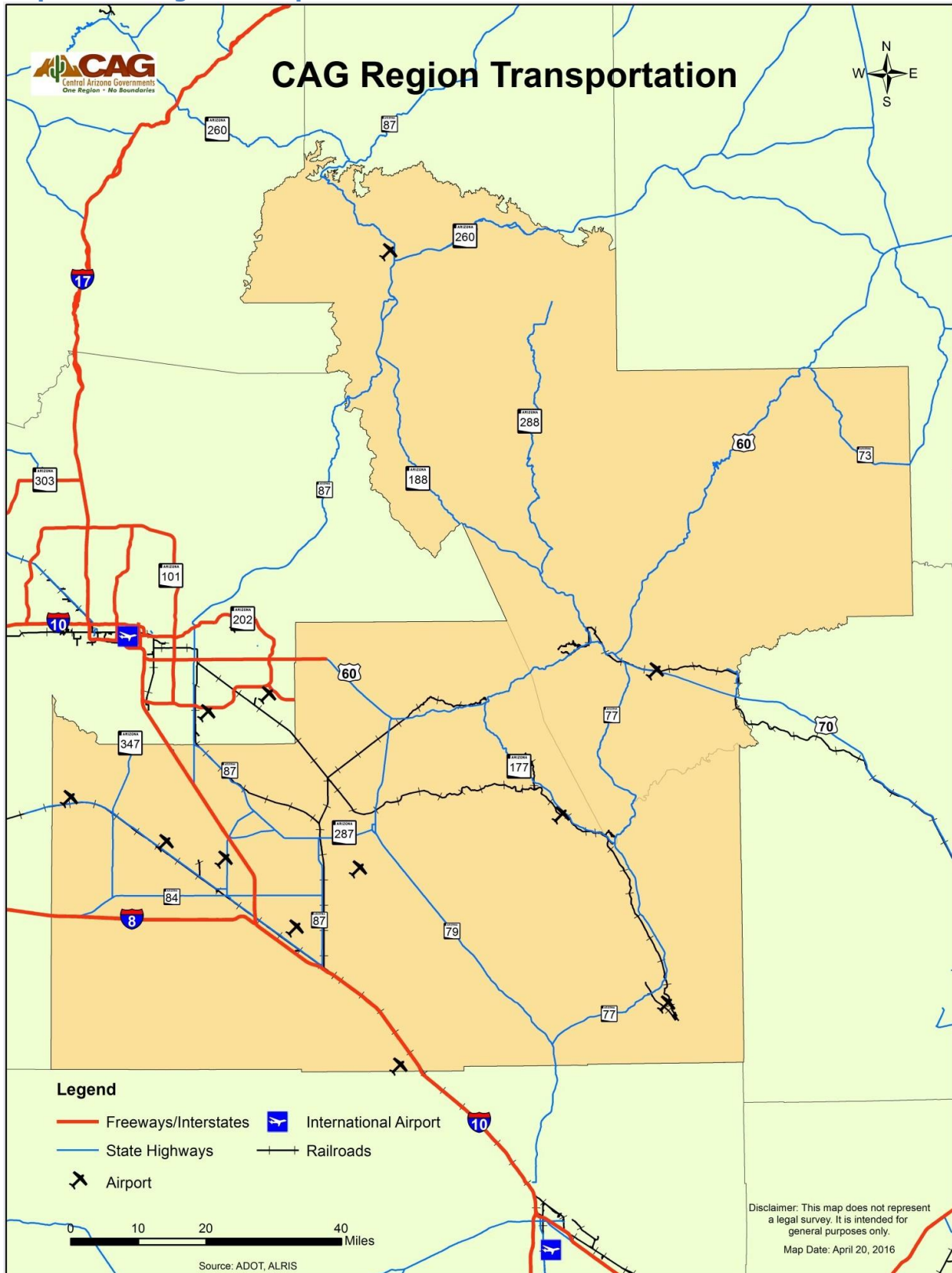
Figure 3: Arizona Trail



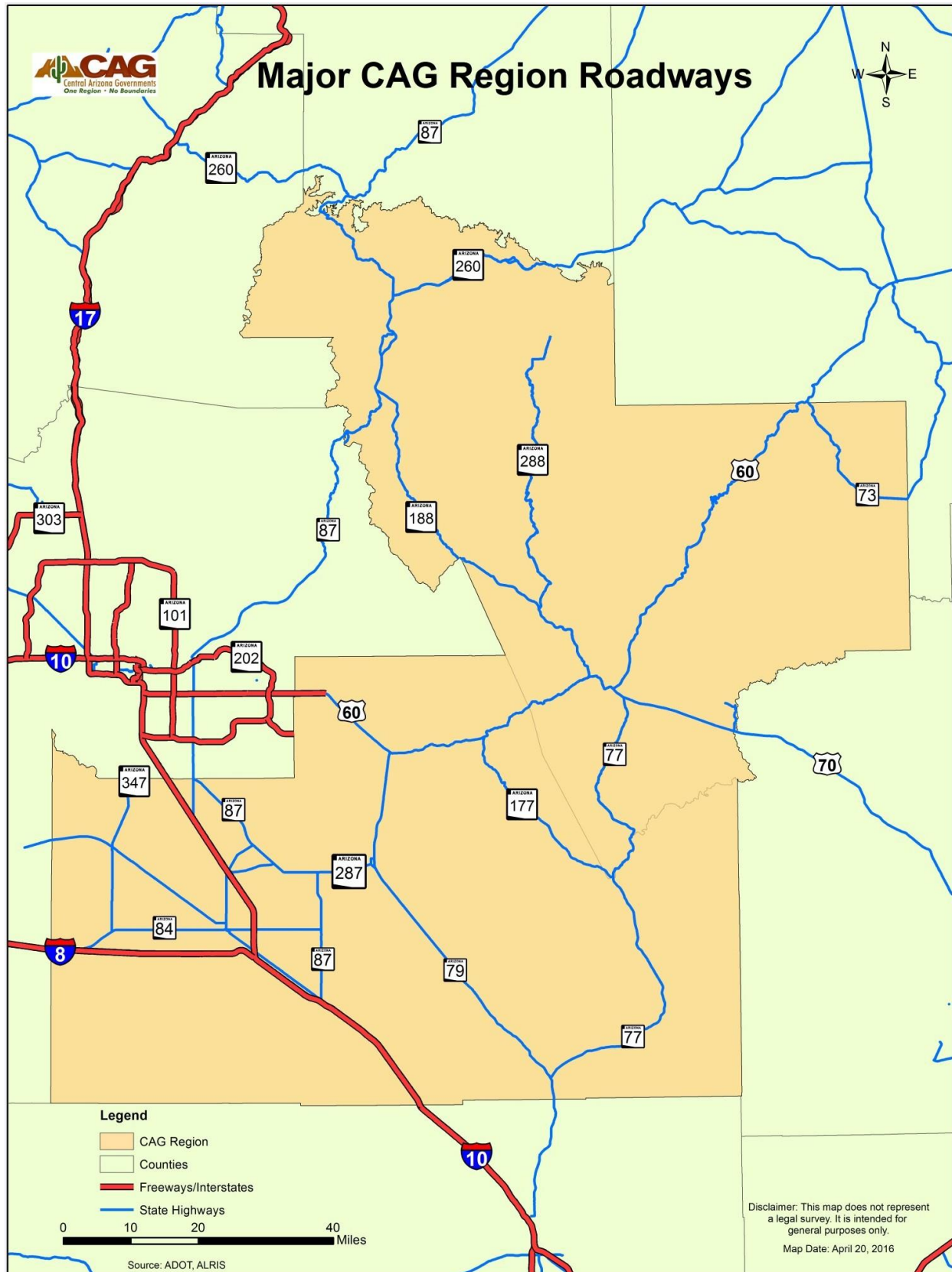
Source: aztrails.org

There are many trails within the CAG Region, most notably the Arizona Trail. The Arizona Trail stretches from northern Arizona all the way to the Mexican border to the south. It is estimated that there are more than 100,000 visitors that pass through the region on the Arizona Trail annually. This brings in-state and out-of- state visitors and spending potential for tourism-related businesses. Other trails, both motorized and non-motorized, are prevalent within the region at federal and state parks. This makes the region popular for outdoor recreation.

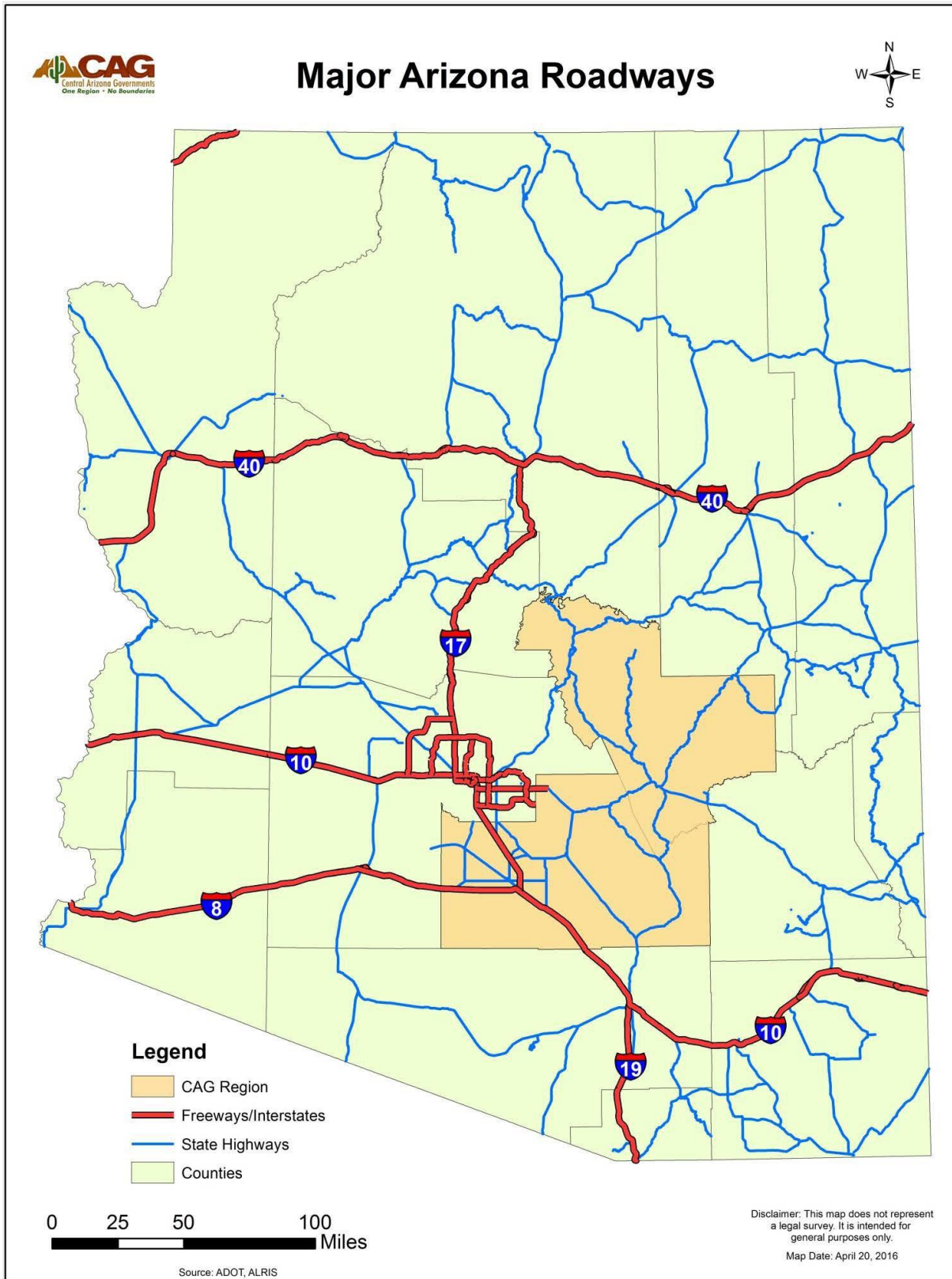
Map 5: CAG Region Transportation



Map 6: Major CAG Region Roadways



Map 7: Major Arizona Roadways



CAG REGION VS. GLOBAL ECONOMY

The Sun Corridor, which is perhaps the best long-term development opportunity for the CAG Region, is one of the major mega-regions in the United States. By 2050, the Sun Corridor is anticipated to double in size and contain 85 percent of Arizona's population and jobs.

Western Pinal County, which is geographically situated within the Sun Corridor, is poised to directly benefit from the trade and development of this region and its close proximity to metropolitan Phoenix and Tucson. Eastern Pinal County and Gila County will also benefit from the future expansion of the Sun Corridor.

The Sun Corridor is geographically positioned to trade with other regions in the United States, and internationally through:

- Trade with Mexico/Latin America and with the Asia Pacific, and
- Nationally, with the Pacific Coast, the Intermountain West, the Midwest, and the South.

These economic development opportunities will require billions in infrastructure investments to come to fruition. In December 2009, the three Councils of Governments (including CAG) that are the regional planning agencies for the Sun Corridor counties agreed by resolution to form the Joint Planning Advisory Council (JPAC), to more formally cooperate in regional planning at an integrated mega-region scale.

Sun Corridor mega-region planning has focused on transportation improvements that would stimulate and support significant economic development opportunities. These include:

- Three studies on Sun Corridor mega-region opportunities, by Arizona State University, the Brookings Institution, and AECOM.
- Planning for a new Interstate – I-11 – that would connect Mexico to British Columbia, a CANAMEX corridor that passes through the CAG Region. A coalition has been formed to lobby for I-11.
- A freight study to understand whether pass-through trucking and rail movement could generate inland port and other freight-related economic development opportunities for the entire Sun Corridor.

Beyond transportation, it is likely that future JPAC regional planning activities will include mega-region economic development planning.

SWOT ANALYSIS FOR THE CAG REGION

The Economic Development Administration requires the CAG Region to perform a SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis of the regional and local economies. The CAG Region has a variety of economic and demographic profiles, but common themes were identified after considerable discussion by the CEDS Committee. Following is a general summary of regional strengths, weaknesses, opportunities, and threats.

Strengths

- Outdoor recreation
- Land availability and affordability for commercial, industrial, and residential uses
- Interstate 8 and 10 access in western Pinal County
- Historic buildings and downtowns
- Population growth
- Copper industry and mining activities
- Natural resources and beauty
- Arizona Trail
- Copper Corridor Economic Development Coalition
- Tourist destination for nearby Phoenix metro – CAG region serves as gateway and attraction
- Seasonal visitors
- US-60 and Loop 202 access
- Proximity to Phoenix Sky Harbor Airport
- Central Arizona College and associated programs
- Gila Community College
- Eastern Arizona College – Satellite locations
- Arizona Renaissance Festival
- Growing construction market
- Union Pacific Railroad
- Housing more affordable than Phoenix metro
- General aviation airports & industrial park possibilities for aviation business
- Health care and access to health care
- Established industrial parks

Weaknesses

- Small business support services
- Land availability and affordability for commercial, industrial, and residential uses
- Sales tax leakage
- Distance to major transportation corridors for rural areas
- Lack of and inadequate broadband service, especially in rural areas
- “Landlocked” communities surrounded by state lands
- Lack of adequate basic infrastructure to attract industrial development, i.e. water, sewer, adequate roads
- Lack of available buildings
- Mines provide little to tax base
- Aging infrastructure
- Fewer job opportunities in smaller communities
- Lack of public transportation
- Lack of workforce housing / low inventory
- High costs of construction
- High property tax rates in Gila & Pinal, especially compared to nearby Maricopa County

Opportunities

- Outdoor recreation promotion
- Phoenix Mart
- Red Rock Rail
- Healthcare service expansion
- Entrepreneurial Development
- Alternative energy production and employment
- Agritourism/Agritainment growth
- Community partnerships
- Marketing of tourism assets and promoting partnership attractions
- Provision of access to natural features and tourism amenities with the potential for scenic/eco-tourism
- Access to Arizona Trail from Copper Corridor
- At home business growth with broadband expansion
- Combining marketing and branding for the region as a tourist destination
- Develop stronger relationship with Economic Development Organizations throughout the region
- Downtown revitalization
- Development of resorts and leisure businesses
- North/South Corridor – Connection between US-60 and Interstate 10
- Higher education in Payson, U of A medicine
- Opportunity Zone Designations
- State Route 14 expanding from Phoenix Mesa to Pinal County
- North/South Corridor - Connection between US-60 and Interstate 10
- Infrastructure - connecting Maricopa, Pinal, and Pima counties
- Electric vehicles and batteries –new companies
- Rio Tinto BHBP - commence construction - copper production until 2030 - spending will be split between two counties - 70% of our workforce is within 70 miles of Superior
- Arizona Innovation and Technology corridor; bookended with ASU and UA; understand assets/resources-promotion
- Multigenerational center; CSPOT, entrepreneurship; education of trades (workforce training) in Superior
- Transit Governance Project (Public Transportation/Transit)
- Bedroom communities of focused development in Maricopa and Pima Counties

Threats

- COVID-19 recovery sluggish in rural areas
- Current workforce skills do not meet needs of technology driven companies
- Current market is for buildings, not sites
- Lack of demographics to support large-scale retail in some areas
- International market fluctuations with respect to resource extraction
- Arizona's tax structure and budget and the effects on small towns and schools
- Availability and access to water
- Lack of current and accessible demographic and economic information
- Lack of Education Funding
- We can't get the I-10 widened from Case Grande to Chandler -lack of state and federal funding for transportation as compared with Maricopa County light rail money ("We're not the great state of Maricopa")
- Maricopa getting built out; permits increasing in outlying areas since they have room to grow
- Infrastructure needs

ACTION PLAN FOR THE CAG REGION

CAG REGIONAL VISION

The vision for the CAG Region is to create a region that is connected to the Arizona, national, and global economy. This will be accomplished by focusing on five areas within economic development. These focus areas include:

Workforce Development
Infrastructure
Economic Diversification
Water Conservation/Management
Tourism & Experience

Improvement in each of these areas will address many of the challenges of the region while improving incomes, creating jobs, and creating a brighter economic future for the CAG Region.

The following goals and objectives centered on these focus areas will contribute to the economic health and vitality of the region. These will require stakeholders from each area to collaborate and seek resources, and success will be measured by the items in the evaluation section.

Workforce Development

Goal: Promote skills that fulfill gaps in workforce training in Gila and Pinal Counties

Objective: Perform a skills-gap analysis of the region in cooperation with businesses

Objective: Promote programs at community colleges and other workforce training entities that fill existing gaps

Objective: Gather and make available current workforce data

Goal: Attract and promote growth in companies that can utilize existing workforce

Objective: Provide local economic developers with workforce data to use in recruitment

Objective: Coordinate efforts between communities for marketing the region

Goal: Develop talent pipeline

Objective: Expand career expos (including all ages K-12)

Objective: Curriculum development for junior high school students

Objective: Increase access to trade school programming (i.e. we have a councilmember interested in actually adding a trade school in the city, or may be more practical to consider satellite facilities?)

Objective: Attract companies that provide higher quality jobs

Infrastructure

Broadband

Goal: Expand broadband capacity in urban areas while promoting expansion of existing networks into rural communities to increase resiliency of region

Objective: Provide resilient/redundant broadband networks within communities

Objective: Explore variety of broadband distribution methods for last mile connections

Goal: Promote telemedicine in the CAG Region

Objective: Promote a healthier population by increasing opportunities to meet with doctors and specialists

Objective: Decrease transportation costs associated with healthcare

Traditional

Goal: Maintain and expand water and sewer networks to meet the needs of businesses and residents

Objective: Public and private water providers evaluate and benchmark current water and sewer networks

Objective: Public and private water providers ensure that costs of service include future replacement and maintenance costs

Objective: Market available capacity to outside businesses

Regional Transportation Network

Goal: Expand existing road network to promote flow from population centers to employment centers

Objective: Create opportunities for traffic to travel through the region and create pass through commerce

Objective: Develop new funding streams to fund transportation improvements and new roads

Objective: Coordinate land use and local economic development with transportation improvements and along key corridors

Objective: Provide political input and support for plans or legislation that improves transportation options throughout the region (i.e. Formal Resolutions by cities and towns for freeway preferred alignments, etc. i.e. North-South corridor via ADOT)

Objective: Jointly ensure coordination and collaboration between all the transportation entities.

Goal: Maintain current roadways and coordinate with the Arizona Department of Transportation on state highways

Objective: Seek funding streams to improve existing roadways

Objective: Work with existing transportation groups to lobby for transportation projects that will have a strong economic impact

Regional Flood Control

Goal: Cooperate as a region to decrease the effects of flooding between communities

Objective: Coordinate flood controls within CAG communities and surrounding counties

Objective: Work with FEMA to identify potential projects for flood control and management

Objective: Cities coordinate with Pinal County Flood Control District for flood control mitigation that impacts businesses

Economic Diversification

Goal: Maintain current legacy industries (mining, agriculture, etc.)

Objective: Monitor legislation that affects the future of mining and agriculture and supporting industries

Objective: Promote programs at community colleges and other workforce training entities that fill existing gaps to support the needs of the legacy industry aging workforce; specifically trades such as welders, electricians, mechanics, and heavy equipment operators

Goal: Diversify the economy utilizing current strengths to promote business attraction and entrepreneurial startups

Objective: Encourage spin-off industries with existing workforce

Objective: Market the region to suppliers and bring them closer to the end user

Objective: Develop sub-regional studies and plans to strengthen specific areas within the region

Goal: Utilize broadband to promote online entrepreneurship and telecommuting/telework

Objective: Organize workshops to train entrepreneurs about online business

Water Conservation/Management (Manage existing and develop new resources)

Goal: Assure water supply for CAG communities while seeking out new opportunities

Objective: Ensure new developments meet standards for assured water supply

Objective: Develop new resources to draw water into the region

Objective: CAG helping with planning and conservation/management of these resources.

Tourism and Experience

Goal: Maintain existing quality of life and utilize assets and attractions to draw visitors

Objective: Create a coordinated effort to attract visitors to the region

Objective: CAG support and encourage individual communities in preserving their heritage

Goal: Preserve natural amenities within the CAG Region

Objective: Preserve views and natural landscapes

Objective: Mitigate effects of non-native species to protect existing flora and fauna

CAG Region Opportunity Zones

The CAG Region also plans to take advantage of opportunity zones. Qualified Opportunity Zones were created by the 2017 Tax Cuts and Jobs Act. These zones are designed to spur economic development and job creation in distressed communities throughout the country and U.S. possessions. This is achieved by providing tax benefits to investors who contribute eligible capital into these communities. Taxpayers may defer tax on eligible capital gains by making an appropriate investment in a Qualified Opportunity Fund and meeting other requirements. (irs.gov)

The following chart details the length of investment and associated benefits to investors.

Length of Investment	Benefits
Fewer than 5 Years	Deferred payment of existing capital gains until the date that the Opportunity Fund investment is sold or exchanged
5-7 Years	Benefits above 10% of tax on existing capital gain is canceled
7-10 Years	Deferred payment of existing capital gains until December 31, 2026 or the date that the Opportunity Fund investment is sold or exchanged (whichever comes first) + 15% of tax on existing capital gain is canceled
Greater than 10 Years	Benefits of 7 - 10 year investment + investors pay no capital gains tax on the Opportunity Fund investment (investments are exempt from any capital gains beyond those which were previously deferred)

*ofn.org

The CAG region is home to 11 designated Opportunity Zones (8 Pinal County, 3 Gila County). The Opportunity Zones are located in:

- Apache Junction
- Casa Grande
- Coolidge
- Eloy
- Florence
- Kearny
- Pinal County
- Superior
- San Manuel (Pinal County)
- Globe
- Miami
- San Carlos Apache Tribe Reservation

CAG communities have the chance to market these Opportunity Zones to potential investors for community and economic development projects.

EVALUATION FRAMEWORK AND RESILIENCE PERFORMANCE MEASURES

Many of the economic performance factors, outlined earlier, are important measures moving forward in the CAG Region. Perhaps of most importance is broadband density. The CAG Region lags behind significantly against the U.S. average. Additional measures of performance include:

- Innovation Index
- Unemployment Rates
- Population to Jobs Ratio
- High-Tech Employment Share
- Tourism Spending
- Educational Attainment
- Patents
- Workforce Statistics
- Degrees/Certificates Earned
- Tourism Visitor Counts
- Start-Up Businesses
- Arizona Progress Meters

The CAG Region will work toward improving these measures by utilizing the strategies outlined in the CEDS, and initiating projects as defined by the communities. Regional cooperation and partnerships will become more important to the improvement of these measures.

Arizona We Want Progress Meters

The Center for the Future of Arizona (CFA) presented these to the CEDS Committee to introduce and highlight the Arizona We Want Progress Meters. CFA developed a dynamic list of progress meters to assess the state's progress in the priorities identified by Arizonans as critical to the future success of the state of Arizona: <https://www.arizonafuture.org/az-progress-meters/overview/>. The Arizona Progress Meters are also aligned with the CAG CEDS, particularly but not exclusively, in the areas Jobs, Education, and Young Talent (Focus Area 1), Infrastructure, Health and Wellbeing (Focus Area 2), and Natural Resources (Focus Area 5). CAG encourages the communities within the region to use the progress meters as a benchmark for future success and support for moving the region and state forward. The Progress Meters will be updated annually by CFA, and when and if available, will include state, county and municipal-level data.

- **JOBS** Availability of jobs that align with the skill sets of residents, and that help the economy thrive;
- **EDUCATION** Equal access to education that prepares students for success;
- **YOUNG TALENT** A state that is attractive in keeping young talent here and drawing talent from other markets;
- **HEALTH AND WELLBEING** Healthy residents with access to healthy communities and affordable health care and wellness;
- **NATURAL RESOURCES** Protection of the state's natural resources as an asset for future generations;
- **INFRASTRUCTURE** Infrastructure that meets the needs of future demand in energy, water, transportation, housing and communications;
- **CIVIC PARTICIPATION** Engaged and informed residents equipped to participate in government at all levels; and
- **CONNECTED COMMUNITIES** Connected communities working together for the betterment of the state of Arizona.

CAG REGION PROJECT LISTING

2021-2025 Priority Projects - Central Arizona Governments Economic Development District

Government	Focus Area	Project	Estimated Cost
Ak-Chin Indian Community	I / ED	Broadband Internet @ Commerce Center	\$415,000
	I	Extension of Lopez Avenue to Miguel Street	\$550,000
Ak-Chin Indian Community Total:			\$965,000
Apache Junction	WCM	Citywide Storm Water Improvement Master Plan	\$250,000
	TE	Construction of Downtown off-leash dog park	\$650,000
	I	Baseline Ave improvements - Winchester to Tomahawk	\$2,200,000
	WCM	Water Infrastructure Upgrade - Pump Capacity	\$530,000
	WCM	Water Infrastructure Upgrade - WTP Improvements	\$1,600,000
	TE	Downtown Wayfinding Study	\$150,000
	I	Silly Mountain improvements (road, signage, etc)	\$2,600,000
	I	Baseline Ave improvements - Meridian to Ironwood	\$6,050,000
	ED	Business Park study	\$165,000
	TE	Development of multi-use trails	\$10,000,000
	I	US60 Corridor - Strategic Development Plan -NEW FY17	\$200,000
	I / WCM	Utility Master Plan Study	\$100,000
	I	Meridian Corridor (US60 south to Elliot) Study	\$300,000
	TE	Old West Highway Beautification	\$100,000
	WCM	Waterline extension on Cortez (OWH to Shouthern)	\$200,000
	Apache Junction Total:		
Casa Grande	I	Kortsen I-10 interchange	\$30,500,000
	I	Runway expansion project	\$5,000,000
	TE	Development of linear park with amenities including walking trails	\$3,000,000
	WCM	Wastewater effluent recharge project - phase I	\$2,500,000
	I	Thornton Rd. & Peters Rd. - Traffic signal	\$400,000
	I	Thornton Rd. & Selma Rd. - Traffic signal	\$400,000
	I	Widening of Peters Rd. from Commerce Dr. to Thornton Rd.	\$10,000,000
	I	Widening of Peters Rd. from Commerce Drive to Burriss Rd.	\$2,000,000
	I	Widening of Thornton Rd. (Maricopa-Casa Grande Hwy to Interstate 8)	\$11,000,000
	WD	Regional Technology/Training Center	\$15,000,000
	I	Extension of Peters Rd. sewer line (Commerce Dr. to Thornton Rd.)	\$2,000,000
	I	Construction of Burriss Rd. Effluent line	\$7,500,000
	I	Hennes I-8 interchange	\$35,500,000
	I	Val Vista I-10 interchange	\$35,500,000
	TE	Construction of a major community park including multiple amenities	\$5,000,000
	I	Improved road access to the city's airport industrial park.	\$600,000
	I	East Side Sewer Line Extension	\$10,000,000
	ED	Small Business Incubator development	\$1,500,000
	I	Selma Rd. improvements (Burriss Rd. - Thornton Rd.)	\$2,000,000
I	Burriss Rd. improvements (Hwy 85 - Selma Rd.)	\$6,000,000	
I	Burriss Rd. Improvements (Hwy 85 - W Cowtown Rd.)	\$8,000,000	
I	Ethington Rd. Improvements (Hwy 85 - W Cowtown Rd.)	\$8,000,000	
Casa Grande Total:			\$201,400,000
Coolidge	I	County (ADRP) Dirt Rd. Program	\$560,000
	TE	Landfill Closure	\$550,000
	TE	Recycling Operational Study	\$300,000
	TE	Coolidge Airport Improvements (New Hangers, Restrooms, Pilots Lounge, Parking Areas)	\$2,500,000
	I	Rail Siding and Spur construction	\$4,000,000
	I	Bartlett Effluent Line	\$560,000
	WCM	Farm Well Improvements	\$115,000
	WCM	Wastewater Treatment Plant Conversion	\$35,000,000
	I	Vah Ki Inn Railroad X-ing Improvements	\$500,000
	I	Citywide Roadway Improvements	\$30,000,000
	I	Wastewater Treatment Plant Improvements	\$169,900
	TE	Downtown Beautification	\$500,000
	I	Airport Wastewater Treatment Plant	\$1,500,000
	I	Central Avenue Railroad X-ing Improvement	\$500,000

Government	Focus Area	Project	Estimated Cost
Coolidge, continued	ED	Airport Industrial Park	\$5,000,000
	I	Increase Electrical Capacity to the Airport	\$1,500,000
	ED	Business Success Center	\$20,000
Coolidge Total:			\$83,274,900
Copper Corridor EDC	ED	Business Success Center	\$20,000
	TE	Preserve history and characteristics of the region	\$18,000
	TE	Celebrate natural and cultural history	\$10,000
	I / ED	Broadband expansion to un/underserved areas	\$10,000,000
	ED	Knowledge base of business data	\$10,000
	ED	Train small businesses in Copper Corridor on becoming licensed, bonded and how to qualify for procurement through local companies	\$150,000
	WD / TE	Develop youth component to local tourism. Create community kitchens within Copper Corridor	\$150,000
	ED	Create relationships to support agriculture, health care and tourism within Copper Corridor (mobile slaughter houses, mobile visitor center, community gardens)	\$200,000
Copper Corridor EDC Total:			\$10,558,000
Copper Corridor EDC / Pinal County	I / ED	Expansion of broadband infrastructure and services within Pinal County	\$25,000,000
Copper Corridor EDC / Pinal County Total:			\$25,000,000
Eloy	I	Wastewater Treatment Plant Expansion	\$46,200,000
	TE	Construction of New Community Center	\$8,000,000
	WCM	Water system improvements	\$6,451,250
	WCM	Water System Improvements – Sunland Gin & I-10	\$5,000,000
	WCM	Water System Improvements – Toltec Road & I-10	\$5,000,000
	I	Pavement of Rural Roads – PM10 compliance	\$5,000,000
	I	Battaglia Road Reconstruction	\$4,500,000
	I	Increase waste water treatment plant capacity to 4MGD	\$3,500,000
	I	Battaglia Road Improvements	\$3,500,000
	I	Sunshine Blvd Reconstruction – Frontier to Battaglia	\$1,400,000
	I	Frontier Street Resurfacing	\$1,240,000
	I	Toltec Subdivision Sewer Construction	\$850,000
	WCM	Regional Drainage Study	\$300,000
	TE	Main Street Eloy Beautification Project	\$300,000
	TE	Frontier Street Beautification	\$250,000
	TE	Downtown Theater Acquisition and Renovation Project	\$200,000
	ED	Downtown revitalization	\$125,000
	TE	Citywide Removal of Dilapidated Structures	\$100,000
	TE	Eloy Water Tower Public Arts Project	\$30,000
	TE	New Police Department Construction	\$10,000,000
	TE	Regional Park	\$8,800,000
	ED	Airport Industrial Park	\$65,000,000
	I	Construction of Miscellaneous Airport Improvements	\$2,500,000
	TE	Design and Construction of Community Center	\$3,000,000
	I	Relocation of Taxiway "A"	\$3,000,000
	I	Runway Extension-Southwest	\$1,800,000
	ED / TE	Design and Construct a Multi-Use Sports Complex	\$1,900,000
	I	Design and Construction of New Sewer Lines	\$2,000,000
	I	Toltec Road Chip Seal	\$750,000
	I	Phillips Road Reconstruction and Chip Seal	\$800,000
	I	Phoenix Avenue Resurfacing	\$750,000
	WCM	Waterline Replacements Throughout the City	\$1,250,000
	WCM	Regional Drainage Study	\$300,000
	TE	Main Street Eloy Beautification Project	\$300,000
	I	Eloy Proper-Slurry Seal for Streets	\$1,000,000
	I	Shedd Road Landscape Design and Construction	\$200,000
TE	New Public Safety Complex	\$1,250,000	
TE	Open Space, Trails and Parks Master Plan	\$100,000	
ED / TE	Downtown Master Plan	\$100,000	
WCM	New Well at Municipal Airport	\$1,000,000	

Government	Focus Area	Project	Estimated Cost
Eloy, continued	WCM	Fire Hydrant Replacement	\$600,000
Eloy Total:			\$198,346,250
Florence	I	Road and intersection improvements	\$15,184,000
	I	Sewer Main Extensions & Replacements	\$300,000
	WCM	Recharge Facility Expansion	\$300,000
	I	SCADA Tie-in/Sewer Controls	\$75,000
	WCM	Water Line Replacements	\$1,180,000
	WCM	SCADA Tie-in (water)	\$25,000
	I	Territory Square infrastructure improvements	\$12,500,000
	ED	Industrial park development	\$2,000,000-\$10,000,000
	I	South WWTP Expansion	\$19,000,000
	WCM	Water barn facility	\$400,000
	WCM	Territory Square flood reclamation	\$6,465,000
	I	Adamsville Road utility improvements	\$3,000,000
	WCM	Water Line Replacements - 8 inch line	\$7,000,000
	I	Roundabout/intersection improvement at SR 79/287	\$996,074
	WCM	Stormwater Master Plan	\$200,000
	WCM	Rodeo Well Replacement	\$1,000,000
	TE	Rodeo Ground Improvements	\$2,000,000
I	Main Street Sewer Line Replacement	\$1,000,000	
Florence Total:			\$70,625,074
Gila County	TE	Abandon housing demolition	\$500,000
	TE	Housing Rehabilitation	\$1,000,000
	TE	Affordable Housing Master Plan	\$60,000
	I	New Signal Peak Communications Tower	\$2,500,000
	TE	County Fairgrounds Improvements (Race Track)	\$5,000,000
	TE	Landfill Expansion Purchase (Townsite Act)	\$4,000,000
Gila County Total:			\$13,060,000
Globe	WCM	Waterline replacement and fireline installation	\$2,600,000
	I	Northeast Corridor Sewer Expansion	\$8,000,000
	TE	Fire Department Facility	\$5,000,000
	ED / TE	Regional Aquatic Center	\$5,000,000
	ED / I	Broadband Internet	\$1,000,000
	TE	Pinal Creek Trail System	\$5,000,000
	I	Sidewalks Replacement	\$10,000,000
	I	Asphalt Rehabilitation	\$30,000,000
Globe Total:			\$66,600,000
Hayden	I	Upgrade to lift/primary pump stations	\$350,000
	I	New Mountain View Street improvements	\$160,000
	I	Engineering for wastewater project/ADA doors	\$137,000
	I	San Pedro Ave sidewalk construction/renovation	\$375,000
	TE	Home & business demolition	\$300,000
	TE	Cemetery upgrade and land purchase	\$200,000
	TE	Develop Hayden Master Plan	\$75,000
Hayden Total:			\$1,597,000
Kearny	I	Roadway Improvements	\$1,000,000
	TE	Construction of new fire station	\$1,000,000
	TE	Construction of Multi-use facility	\$1,000,000
	TE	Construction of 24 hour urgent care facility	\$1,000,000
	I	Local Street Paving	\$950,000
	I	Street lighting - Public safety and meet Dark Sky standards	\$200,000
	WCM	Fire hydrant replacement	\$75,000
	TE	Public swimming pool renovations	\$2,000,000
	WCM	Kearny Lake and water quality improvements	\$1,000,000
	WCM	Repair and upgrade of water wells	\$1,000,000
	I	Wastewater Treatment Facility Improvements	\$500,000
	TE	Lake park facilities construction	\$250,000
	TE	Housing rehabilitation	\$250,000

Government	Focus Area	Project	Estimated Cost
Kearny, continued	WCM	New wells to decrease reliance on Gila Water Accords	TBD
	TE	Gila River Park	\$500,000
	TE	Fire truck(s)	\$350,000
	TE	Offroad Vehicle Park	\$150,000
	TE	Rail and Copper Park improvements	\$185,000
	TE	Construction of New Police Station	\$1,000,000
	TE	Recreation / Park Renovations	\$2,000,000
Kearny Total:			\$14,410,000
Mammoth	I / WCM	Update well pumps and sewer infrastructure	TBD
	WCM	Water main line replacements	TBD
Mammoth Total:			TBD
Maricopa	I	Extension of Estrella Drive	\$2,000,000
Maricopa Total:			\$2,000,000
Miami	TE	Town pool facilities renovation	\$250,000
	TE	Bridge/Park rehabilitation and renovation	\$500,000
	I	Sullivan Street and connector streets improvements	\$400,000
	I	Modification of sidewalks for ADA compliance	\$250,000
	TE	Demolition/renovation of vacated properties	\$5,000,000
	ED / TE	Sullivan Street Buildings Renovation	\$165,000
	I	Cleaning and Replacement of Diffuser at WWTP	\$75,000
Miami Total:			\$6,640,000
Payson	ED / I	Redundant Broadband	\$3,000,000
	TE	Multi-Generational Center	\$8,000,000
	I	American Gulch Improvements	\$10,000,000
	TE	Event Center Master Plan and Improvements	\$4,200,000
	TE	Green Valley Lake Parking Lot Expansion	\$500,000
	I	Payson Area Trails System Continuation	\$1,275,000
	TE	Rumsey Park Pedestrian Circulation and lighting plan	\$100,000
	TE	Highway Landscape Beautification	\$1,500,000
	I	Roadway Improvements	\$600,000
	I	New road construction in the Rumsey Drive alignment.	\$2,100,000
	TE	Master plan for park system	\$200,000
	I	Construction of new roadway	\$980,000
	TE	Purchase of redevelopment property for Main Street parking	\$400,000
	ED	Economic Development Plan update	\$30,000
	TE	Parking lot lights and Landscaping public lot on Westerly	\$45,000
	TE	Bird Viewing platform, Nature signage at Downtown Watercourse Park	\$75,000
	I	McLane Road Bridge Crossing at Downtown Watercourse Park	\$1,000,000
ED / TE	Purchase property in Downtown area for Affordable Housing, Watercourse Development and Commercial Development	\$3,000,000	
Payson Total:			\$37,005,000
Pinal County	I	BUILD Grant Hanna & Houser Roads	\$15,000,000
	ED / TE	Pinal AirPark Improvement Plan (Grant)	\$900,000
	I	Hunt Highway Ph V	\$3,130,000
	I	San Tan Valley Roadway Improvements	\$700,000
	TE	P25 Radio upgrades	\$20,000,000
	TE	Pinal County Complex (San Tan Valley)	\$16,000,000
	TE	Pinal County Administration / Services Building - City of Maricopa	\$11,000,000
	TE	New Development Services Building & EOC improvements - Florence	\$16,000,000
	TE	New County Attorney's Building	\$21,000,000
Pinal County Total:			\$103,730,000
Queen Creek	ED	Strategic Investment Plan for Commercial and Employment Uses in State Trust Land	\$200,000
	I	Riggs Road- Ellsworth to Meridian Roads	\$14,500,000
	TE	Update Development Services' fees	\$9,000
	TE	Initiate Study of Potential Public Art Ordinance/Program	\$9,000
	TE	Selectron Text Inspection Software Upgrade	\$84,000
	I	Rittenhouse Road widening project from Ocotillo to Riggs Road from 2 to 5 lanes.	\$14,000,000

Government	Focus Area	Project	Estimated Cost
Queen Creek, continued	I	Town Center Roads of Aldecoa and Duncan Street (New Roads in Town center area)	\$1,500,000
	I	Ocotillo From Hawes to Power widen from 2 to 5 lanes	\$7,000,000
	I	Ocotillo from Meridian to Ironwood Roads widen to 5 lanes	\$7,000,000
	I	Queen Creek Road from Ellsworth to Signal Butte widen to 5 lanes	\$10,000,000
	I	Meridian Road from Combs to future SR 24	\$20,000,000
Queen Creek Total:			\$74,302,000
San Carlos Apache Tribe	WD / ED	Apache College	\$5,000,000
	I	Cutter Airport Hanger/Lobby	TBD
	WCM	Ground Water Lease	TBD
	ED / WCM	Spring Water Sales	TBD
	ED	Economic Holding Corporation	TBD
	I	IRR Route #6 Road Repair	\$6,000,000
	TE	Seneca Lake Recreation	TBD
San Carlos Apache Tribe Total:			\$11,000,000
Superior	TE	Designation of Recreational User Trails - Superior Conceptual Trails Plan (Mountain Climbing, Hiking, Bicycle, Equestrian)	\$2,200,000
	TE	Upgrade of major community parks including multiple amenities	\$500,000
	I	Paving of town streets	\$6,000,000
	ED / TE	Renovation of Town Owned Buildings for Commercial use	\$250,000
	I	Airport Infrastructure	\$500,000
	TE	Development of Green Belt	TBD
	TE	Blight Mitigation	\$250,000
	TE	Construction of Multi-Generational Center and Library	\$4,000,000
	I	Marco Rail line infrastructure	\$15,000,000
	TE	Historical and Cultural Development center	TBD
	I	Waste Water Treatment Plant	\$2,570,000
	ED	Enteprenuership and Innovation Center	\$1,690,000
Superior Total:			\$32,960,000
Winkelman	TE	Arts in Public Places Improvements (Westside Town Entrance Design)	\$17,000
	I	Paving Town streets	\$1,000,000
	ED / TE	Renovation of buildings for commercial use	\$250,000
	I	Construct Restrooms at Park	\$150,000
	TE	Cobo Lane beautification and park entrance design	\$25,000
	TE	Murals & paint Town building	\$75,000
	TE	Historical Bridge Improvements	\$10,000
	TE	Museum	\$200,000
	TE	Fire Station Renovation	\$50,000
	TE	Affordable Apartments	\$400,000
TE	Landscaping (Plant Trees) at Park	\$1,000	
Winkelman Total:			\$2,178,000