

Central Arizona Governments
One Region • No Boundaries

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)

2026-2031

OCTOBER 2026

ACKNOWLEDGEMENTS

Prepared by Central Arizona Governments (CAG), in partnership with the Arizona Town Hall and Northern Arizona University Economic Policy Institute, 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, CAG Management Committee, CAG Regional Council, CAG Economic Development District Board of Directors, 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.

Central Arizona Governments

2540 W Apache Trail, Suite 108, Apache Junction, Arizona 85120

Phone: 480-474-9300 • 800-782-1445 • Fax: 480-474-9306

www.cagaz.org

This report was funded by a grant from the United States Department of Commerce Economic Development Administration.

TABLE OF CONTENTS

EXECUTIVE SUMMARY 1
- FOCUS AREA #1: DYNAMIC BUSINESS ENVIRONMENT 2
- FOCUS AREA #2: LIVABILITY AND HOUSING 2
- FOCUS AREA #3: INFRASTRUCTURE AND SITE READINESS 2
- FOCUS AREA #4: READY WORKFORCE 2

INTRODUCTION 3
REGIONAL OVERVIEW 4
- Gila County: 6
- Pinal County: 6
- Native American Communities: 7
- Arizona Sun Corridor: 7

WHAT SETS THE CAG REGION APART 8
- Strategic Location and Transportation Connectivity: 8
- Available Land and Lower Business Costs: 8
- Business-Friendly Environment: 8
- Geographic Diversity: 8

REGIONAL SWOT ANALYSIS 9
- STRENGTHS 10
  - Resilient Economy: 10
  - Transportation and Infrastructure: 10
  - Livability: 11
  - Labor Force and Education: 11
- WEAKNESSES 12
  - Housing: 12
  - Costs: 12
  - Infrastructure: 12
  - Labor Force and Education: 13
- OPPORTUNITIES 14
  - Business Diversification: 14
  - Transportation: 15
  - Tourism Growth: 15
- THREATS 15
  - Environmental: 15
  - Social Issues: 16
  - Market and Funding Shifts: 16

STRATEGIC ACTION PLAN 17
- FOCUS AREA #1: DYNAMIC BUSINESS ENVIRONMENT 18
  - Target Opportunity: Legacy Industry Support and Expansion 18
  - Target Opportunity: Economic Diversification 19
  - Target Opportunity: Existing Business Support and Readiness 19
  - Target Opportunity: Tourism and Destination Recreation 19
- FOCUS AREA #2: LIVABILITY AND HOUSING 20

Target Opportunity: Adequate Water Supply 20
Target Opportunity: Workforce Housing 20
Target Opportunity: Healthcare 20
FOCUS AREA #3: INFRASTRUCTURE AND SITE READINESS 21
Target Opportunity: Broadband 21
Target Opportunity: Water and Wastewater 21
Target Opportunity: Energy 21
Target Opportunity: Comprehensive Transportation Network 22
Target Opportunity: Disaster Preparedness 23
FOCUS AREA #4: READY WORKFORCE 23
Target Opportunity: Workforce Development 24
Target Opportunity: Education 26
EVALUATION FRAMEWORK 27
ACCOUNTABILITY 27
Central Arizona Governments 27
Economic Development District 27
Community and Tribal Partners 28
HOW SUCCESS IS MEASURED 29
JOBS: 29
EDUCATION: 30
LIVABILITY & HOUSING: 30
INFRASTRUCTURE: 30
APPENDIX A. Demographic and Economic Overview of CAG Region 31
POPULATION AND GROWTH 31
ECONOMIC GROWTH 32
EMPLOYMENT AND LABOR FORCE 33
K–12 EDUCATION: THIRD-GRADE READING PROFICIENCY 34
EDUCATIONAL ATTAINMENT 35
WAGES AND PERSONAL INCOME 36
HOUSING AND LIVABILITY 37
BROADBAND INFRASTRUCTURE 39
TOURISM AND VISITOR ECONOMY 41
APPENDIX B. Tribal Community Profiles 42

LIST OF FIGURES

Figure 1: CAG - CEDS SWOT ANALYSIS 9
Figure 2: SWOT Analysis Foundation for Strategic Focus Area 18
Figure A.1: Population Growth, 2023-2025 31
Figure A.2: Projected Population Growth, 2025-2030 32
Figure A.3: Real GDP Growth, 2020-2024 32
Figure A.4: CAG Region Real GDP, 2020-2024 33
Figure A.5: Unemployment Rate, 2025 33
Figure A.6: Labor Force Participation Rates 34
Figure A.7: Population Age 25 and Older with a High School Diploma or Higher 35
Figure A.8: Population Age 25 and Older with a Bachelor's Degree or Higher 35
Figure A.9: Average Annual Wages per Employee, 2021 and 2025 36
Figure A.10: Per Capita Personal Income, 2024 37
Figure A.11: Homeownership Rates 37
Figure A.12: Homeowners Paying 30 Percent or More of Income for Housing 38
Figure A.13: State of Arizona and Arizona Counties Housing Units per Person 39
Figure A.14: Residential Fixed Broadband Availability at 100/20 Mbps by Arizona County 40
Figure A.15: CAG Region Total Direct Travel Spending, 2020-2024 41
Figure A.16: CAG Region Visitor Spending by Category, 2024 41

LIST OF TABLES

Table A.1: Third-Grade English Language Arts Proficiency, 2025 34
Table B.1: Key Social and Economic Indicators for the Four Tribal Communities[1] 42

LIST OF MAPS

Map 1: CAG Region 4
Map 2: CAG Region Communities 5

ABBREVATIONS

ACA	Arizona Commerce Authority
ACS	American Community Survey
ADOT	Arizona Department of Transportation
APS	Arizona Public Service
BEA	Bureau of Economic Analysis
BNSF	BNSF Railway Company
CAC	Central Arizona College
CAG	Central Arizona Governments
CAVIT	Central Arizona Vocational Institute of Technology
CEDS	Comprehensive Economic Development Strategy
CFA	Center for the Future of Arizona
CTE	Career Technical Education
CVIT	Cobre Valley Institute of Technology
EDA	Economic Development Administration
EDD	Economic Development District
ELA	English Language Arts
FCC	Federal Communications Commission
FEMA	Federal Emergency Management Agency
GDP	Gross Domestic Product
GPEC	Greater Phoenix Economic Council
HIT	High-Impact Training
HUD	U.S. Department of Housing and Urban Development
LAUS	Local Area Unemployment Statistics
MPO	Metropolitan Planning Organization
Mbps	Megabits per second
OEO	Office of Economic Opportunity
PCI	Per Capita Income
PCPI	Per Capita Personal Income
PM10	Particulate matter with a diameter of 10 micrometers or less
PRTA	Pinal Regional Transportation Authority
SCIP	San Carlos Irrigation Project
SRP	Salt River Project
SWOT	Strengths, Weaknesses, Opportunities, and Threats
UPRR	Union Pacific Railroad

EXECUTIVE SUMMARY

In 2026, the Central Arizona Governments, with its allied public, private, and tribal partners, worked to complete the 2026-2031 Comprehensive Economic Development Strategy. The Economic Development Administration requires this five-year update for Economic Development Districts. Since the last strategy, the region has grown, and its economic profile has changed, requiring a new examination of the future economic landscape.

After a thorough analysis of demographic and economic shifts and a comprehensive evaluation of the region's strengths, weaknesses, opportunities, and threats (SWOT), the region established a foundation for developing a five-year strategy. The following factors set the region apart and provide the pillars for economic success.

- Strategic location and transportation connectivity.
- Available land and lower business costs.
- Business-friendly environment.
- Geographic diversity.

Building on the regional pillars that set the region apart, the strategy further evaluated key components from the SWOT analysis.

STRENGTHS	WEAKNESSES
• Resilient Economy • Transportation and Infrastructure • Livability • Labor Force and Education	• Housing • Costs • Transportation and Infrastructure • Labor Force and Education

OPPORTUNITIES	THREATS
• Business Diversification • Transportation • Tourism growth	• Environmental • Social Issues • Market and Funding Shifts

The Strategic Action Plan presents the regional economic vision, CAG mission statement, and the region's definition of economic resiliency. To advance the vision and mission and work toward economic resiliency, the plan identifies four focus areas. These focus areas provide the foundational structure for moving the region forward. Within each focus area, the plan identifies target opportunities, timeframes for substantial effort, goals describing intended outcomes, and objectives that outline specific strategies for achieving those goals.

FOCUS AREA #1: DYNAMIC BUSINESS ENVIRONMENT

Target Opportunities:

- Legacy industry support and expansion
- Economic diversification
- Existing business support and readiness
- Tourism and destination recreation

FOCUS AREA #2: LIVABILITY AND HOUSING

Target Opportunities:

- Adequate water supply
- Workforce housing
- Healthcare

FOCUS AREA #3: INFRASTRUCTURE AND SITE READINESS

Target Opportunities:

- Broadband
- Water and wastewater
- Energy
- Comprehensive transportation network
- Disaster preparedness

FOCUS AREA #4: READY WORKFORCE

Target Opportunities:

- Workforce development
- Education

The region's economic strategy is not intended to circumvent, but to support economic development efforts by communities, tribal, and private entities. The strategy outlines how this collaboration works in the Evaluation Framework and includes the performance factors to assess progress toward goals and objectives. Implementing the CAG Comprehensive Economic Development Strategy depends on effective communication with regional, state, and federal entities, with a shared focus on strengthening and building a more resilient regional economy.



INTRODUCTION

The Comprehensive Economic Development Strategy (CEDS) is both an actionable blueprint for sparking inclusive regional growth and a comprehensive economic strategy that meets Economic Development Administration (EDA) requirements. The CEDS (2026-2031) recognizes that the CAG region is diverse, with dynamic needs requiring flexibility to advance local and regional initiatives.

CAG performed a competitive analysis to understand the region's economic position. Using this analysis, CAG identified strategic actions to enhance economic resiliency, innovation, and long-term livability. The CEDS is the overarching planning document and data source that CAG uses to prepare regional priorities and projects for implementation. However, it is not intended to be the only document directing economic development in the region. It aligns with and enhances ongoing economic development efforts and supports broader regional, state, and local plans.

The CEDS resulted from meaningful engagement with community leaders and stakeholders from throughout the region. The update process used existing working groups in the two counties to solicit input from the public and private sectors. The CEDS Committee membership represented the region and met several times to develop strategies to address regional issues.

CAG made the draft CEDS available on its website for public review and comment and published notices in newspapers throughout the region to encourage public input. No comments were received during the public comment period. The CEDS Committee, Management Committee, Regional Council, acting as the Economic Development District Board, approved the 2026–2031 CEDS in October 2026. Following approval, CAG submitted the final CEDS to the EDA for approval.

CAG OVERVIEW

The Central Arizona Governments (CAG) was established in 1975 and provides regional planning services to Gila and Pinal Counties. CAG is the designated regional economic development district (EDD) and is required by EDA to maintain and update the CEDS every 5 years. The CAG Regional Council serves as the Economic Development District board.

CEDS PURPOSE

EDA developed the CEDS Program to evaluate and quantify districts nationwide.

The purpose:

- Establish regional priorities for projects and investments.
- Promote economic development and opportunity
- Foster effective transportation systems
- Enhance and protect the environment
- Balance resources through sound management of development.

REGIONAL OVERVIEW

Historic and projected regional development points to a promising future but also highlights fundamental challenges. For decades, the region has had abundant developable land, particularly in Pinal County; relatively affordable housing; and excellent quality-of-life attributes that have fueled Pinal County's strong population growth and Gila County's stability. The region has and will continue to struggle to maintain these attributes as growth continues and the economy shifts.

Map 1: CAG Region



The CAG region includes two very different counties (Pinal and Gila), 18 distinct incorporated governments, and four sovereign Native American communities. Gila County covers 4,757.6 square miles, and Pinal County covers 5,366.7 square miles (excluding water bodies). The EDD land area is 10,124.3 square miles.

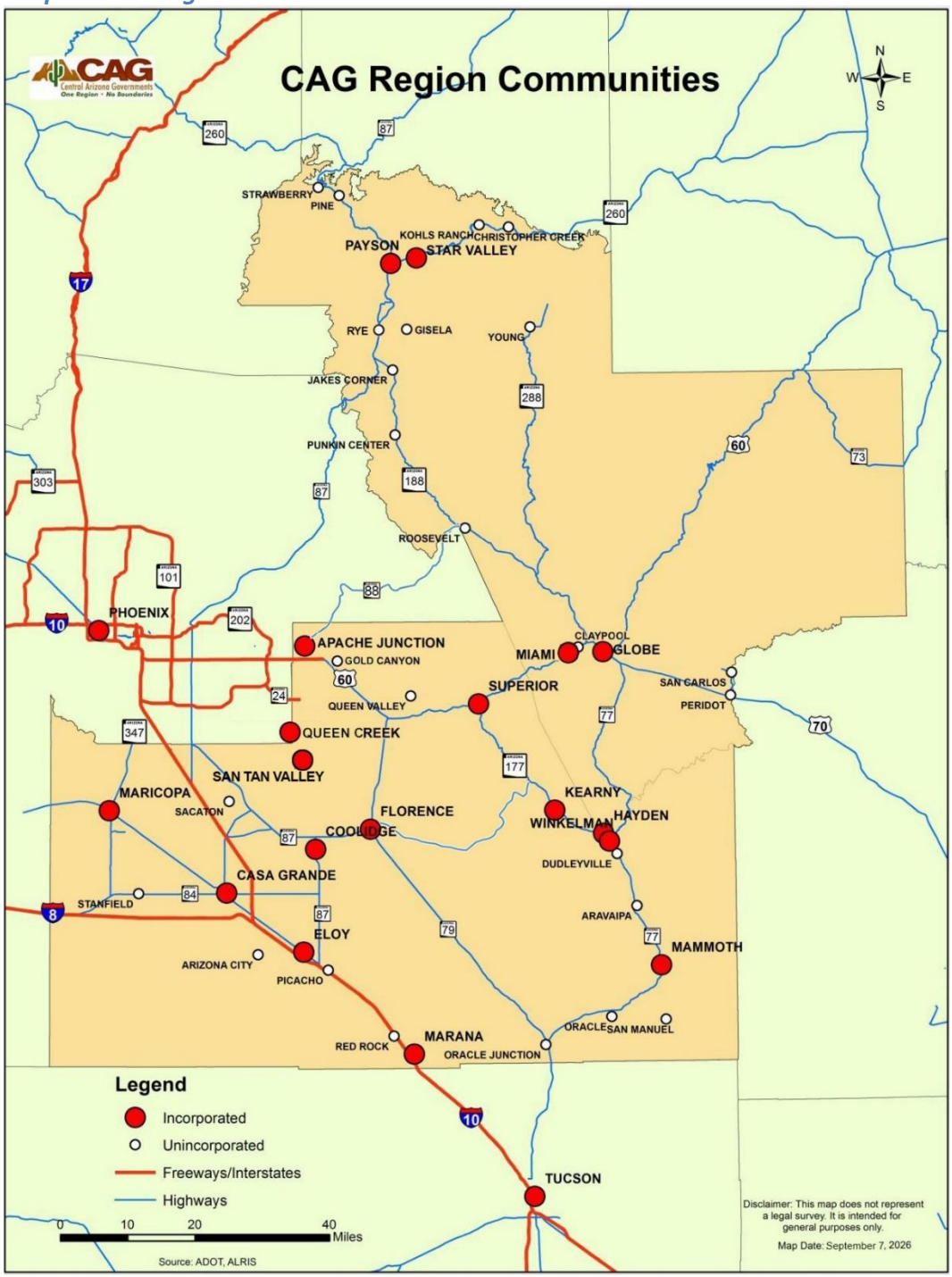
- **Gila County:** Globe, Hayden, Miami, Payson, Star Valley, and Winkelman.
- **Pinal County:** Apache Junction, Casa Grande, Coolidge, Eloy, Florence, Kearny, Mammoth, Marana, Maricopa, Queen Creek, San Tan Valley, Winkelman, and Superior.
- **Native American Communities:** Ak-Chin Indian Community,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

The EDD borders Maricopa County, with large, growing suburban communities to the north and west, and Pima County to the south. Yavapai, Coconino, and Navajo counties border the EDD to the north, and Graham County to the east. Land ownership patterns also shape the region's development. Only 15 percent of the region's land is privately owned; the remaining 85 percent is divided among federal lands (37 percent), Native American Indian Communities (29 percent), and Arizona state trust lands (19 percent). The lack of privately owned land challenges the region's ability to diversify. A good portion of the state trust land is located near or within existing communities and is ideal for development. Opportunities for physical expansion in eastern Pinal County and all of Gila County are limited, but opportunities remain to improve local economies and quality of life.

The region falls into three distinct elevations: low-lying desert across 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, further complicated by variation in physical environment and land ownership. Together, these factors create distinct sub-regions throughout Gila and Pinal counties. Additionally, soil-type variations limit development across large portions of the region. In general, the western portions of the CAG region have more developable soils.

Map 2: CAG Region Communities



Gila County: Gila County covers approximately 4757.6 square miles in east-central Arizona. Its varied topography and geology have shaped its development and economy. Mountainous terrain and the heavily timbered Mogollon Rim dominate the north and east. The Gila, Salt, and East Verde Rivers, all major surface-water tributaries, help define the county's physical, political, and resource-management areas. Globe is the county seat and the second-largest urban population area. Approximately 96-98 percent of Gila County is publicly held or under tribal jurisdiction; only 2-4 percent is privately held.

Because of its varied physiographic features and existing development patterns, Gila County can be divided into geographic regions, each with a unique identity and history. Southern Gila County, which roughly extends south from Globe and Miami to the Hayden/Winkelman area, has an economy and culture rooted in copper mining. The eastern region comprises portions of the San Carlos and Fort Apache Indian Reservations. The central Gila County region, including Tonto Basin, has grown steadily, supported by easy access to the Phoenix metropolitan area, available private land, and proximity to Roosevelt Lake. The northeastern portion, which contains the community of Young, is surrounded by public lands and is very rural. The northern Gila County region, including Payson, Pine, and Strawberry, has seen a population surge as local economies have shifted from mining and timber to tourism, attracting visitors for second-home development and recreation. The Town of Payson is the trade center for northern Gila County and has experienced steady population and employment growth since 2000.

Pinal County: Pinal County is one of Arizona's largest counties. It covers 5,366.7 square miles and includes thirteen incorporated municipalities, four Native American communities, and unincorporated areas. Pinal County continues to grow rapidly. While Gila County's population remained relatively stable, adding about 605 residents between 2020 and 2025 (an increase of 1.1 percent), Pinal County has added about 62,943 residents between 2020 and 2025 (an increase of 14.3 percent). Rapid growth over the past several decades has been attributed to abundant, low-cost, developable land and relatively inexpensive commutes to employment centers in the Phoenix and Tucson metropolitan areas. Most notable is new employment growth in the county from emerging industries, expansions, and supplier companies. Pinal County is a mosaic of public and private land ownership, with the county having planning authority over privately owned unincorporated land. Arizona state trust lands represent about 2/3 of available land in Pinal County, and other jurisdictions include federal lands managed by the Bureau of Land Management, the Bureau of Reclamation, and the U.S. Forest Service.

To provide a more recent view of population change within individual communities, the CEDS also examines growth from 2023 to 2025. The shorter period reflects stakeholder concerns that pandemic-era population estimates may not fully capture recent local growth patterns. Based on the 2023-2025 estimates, population growth remains concentrated in Pinal County communities, including Queen Creek (33.3 percent), Apache Junction (14 percent), Coolidge (13.4 percent), Maricopa (13 percent), and Casa Grande (12 percent). Figure 1 in Appendix A provides the complete community-level growth rates.

Population growth is expected to continue. Arizona Office of Economic Opportunity projections indicate that the CAG region could grow another 15.6 percent between 2025 and 2030, reaching approximately 642,900 residents. Pinal County is projected to grow 17.3 percent during this period, while Gila County

is projected to remain relatively stable, increasing approximately 0.6 percent. These differing growth patterns create different economic development needs across the region, including accommodating rapid population and employment growth in portions of Pinal County while maintaining services, infrastructure, economic opportunity, and quality of life in slower-growing rural communities.

Pinal County broke ground on the final mile 5G wireless internet project in early 2026. This fully funded project will build 32 radio towers across the county, providing 5G wireless internet to rural communities. The upgraded service will improve opportunities for remote learning, telemedicine, government services, emergency management, and local business and economic development.

Native American Communities: The CAG region includes four sovereign nations: Ak-Chin Indian Community, Gila River Indian Community, San Carlos Apache Tribe, and White Mountain Apache Tribe. These communities play a major role in the region's economy and have a significant presence. For example, the Gila River Indian Community has several industrial parks and many successful tribal enterprises that provide jobs and revenues. All four tribal communities operate casinos and are working to diversify their economies to support tribal members. Agriculture, tourism, and resource management play a significant economic role in all four communities.

Broadband expansion is an important component of economic development and community connectivity across the CAG region's tribal communities, supporting access to education, healthcare, employment, and business opportunities. The National Telecommunications and Information Administration's Tribal Broadband Connectivity Program has awarded funds to all four CAG tribal communities or their associated entities: approximately $3.1 million for Ak-Chin Indian Community, $4.5 million for Gila River Indian Community, $9.9 million associated with the San Carlos Apache Tribal Council, and $24.4 million for the White Mountain Apache Tribe. For example, Ak-Chin Indian Community's project will connect 255 previously unserved Native American households and include fiber, wireless infrastructure, and workforce training.

Arizona Sun Corridor: The Arizona Sun Corridor stretches from Santa Cruz and Cochise Counties to central Yavapai County. The Sun Corridor is an emerging megaregion that connects Mexico to the Intermountain West. It is one of the United States' major megaregions. By 2050, the Sun Corridor is anticipated to double in size and contain 85 percent of Arizona's population and jobs. Pinal County is an integral part of the Sun Corridor. Western Pinal County, located within the Sun Corridor, is poised to benefit directly from the region's trade and development, as well as its proximity to metropolitan Phoenix and Tucson. Eastern Pinal County and Gila County will also benefit from the Sun Corridor's future expansion.

The Sun Corridor is positioned to trade with other regions in the United States and internationally through trade with Mexico/Latin America and 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 succeed. The Sun Corridor Metropolitan Planning Organization (MPO) was formed to address the region's transportation infrastructure to support sustainable economic growth within Pinal County.

WHAT SETS THE CAG REGION APART

Strategic Location and Transportation Connectivity: The region is positioned between two major urban counties (Maricopa and Pima) with strong, growing economies and workforces. It sits along major transportation corridors, offering a day's drive to major West Coast markets and connectivity within three hours of Mexico's international ports of entry. Rail service via the Union Pacific Railroad main line provides coast-to-coast service. The region also has access to three major airports within about one hour, with two offering international service (Phoenix Sky Harbor International Airport and Tucson International Airport).

Arizona Department of Transportation (ADOT) is conducting the Phoenix to Tucson Intercity Passenger Rail Corridor Study. The study will explore passenger rail service along a 158-mile segment of the Union Pacific Railroad (UPRR) Corridor between the greater Phoenix and Tucson regions. The project offers an alternative mode of transportation that would connect the state's two largest metropolitan areas and complement travel on I-10, the interstate highway linking the two regions. The passenger rail corridor is not currently funded for implementation. Historically, passenger service has existed, but no passenger rail service currently runs between Tucson and Phoenix.

The two Class 1 railroads in Arizona, BNSF Railway Company (BNSF) and Union Pacific Railroad (UPRR), facilitate the coast-to-coast movement of various commodities. UPRR is the primary freight operator in the Tucson-Phoenix corridor and owns the Sunset Route, which supports Amtrak service in the Phoenix-Tucson corridor through the CAG region, with a station in the City of Maricopa. In addition, multiple active regional and short line railroads are located in the region.

Available Land and Lower Business Costs: Compared to surrounding Phoenix and Tucson urban areas, the CAG region offers more affordable commercial and industrial land. With only 15 percent privately held land, development is challenging. Arizona state trust lands make up 19 percent, and much of the land is ideally located for development.

Business-Friendly Environment: Pinal County and the cities within the Sun Corridor have taken a proactive approach to economic growth, attracting capital investment, major business development, and job creation. Gila County communities have also pursued coordinated economic development, resulting in business diversification and increased tourism. The region has a positive business image, with communities providing streamlined permitting and targeted incentives to support business growth. The region offers outstanding workforce training opportunities and site-selection assistance.

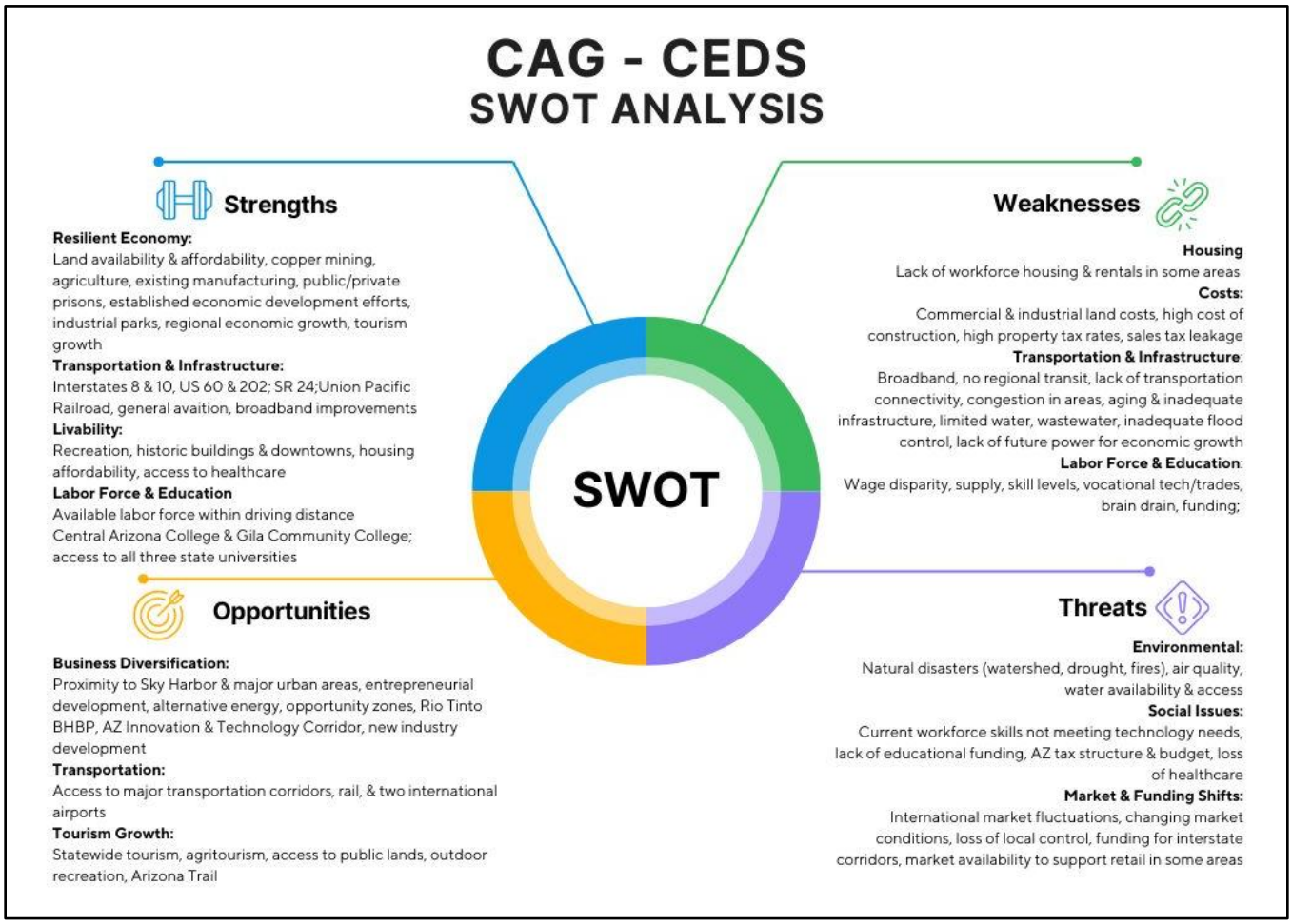
Geographic Diversity: Diverse geographic areas, historic sites, and recreational opportunities add to the region's uniqueness and livability. These assets attract visitors and support businesses, helping strengthen the economic base.

REGIONAL SWOT ANALYSIS

Understanding the region's economic position is essential to shaping effective economic strategies. This multidimensional economic assessment of strengths, weaknesses, opportunities, and threats (SWOT) guides strategic regional evaluation and links strategy development to projects. Strengths and weaknesses are internal factors the region can control and improve through strategy. A factor can be both a strength and a weakness. For example, the CAG region has made great strides in broadband development, but gaps remain in some geographic areas. Opportunities and threats are external conditions the region must recognize and prepare for. Opportunities are external elements the region can exploit to its advantage. Threats are external elements that can hinder or endanger the region.

The CAG analysis examines key components of economic competitiveness, including workforce development, business retention and expansion, economic diversification, and livability issues such as healthcare, education, housing, and affordability. This analysis includes site selection factors that influence investment decisions and identifies infrastructure or business support issues. Together, these factors inform the strategic action plan focusing on long-term prosperity.

Figure 1: CAG - CEDS SWOT ANALYSIS



STRENGTHS

Resilient Economy: The CAG region has a long history of economic resiliency. The area is large, with available, affordable land attractive for new business development. Historical resource industries such as copper mining and agriculture continue to drive economic activity and create opportunities. Almost all the region's population growth (+63,000 residents since 2020) and economic growth (+30 percent gross domestic product (GDP), 2020-2024) have occurred in Pinal County, while Gila County remains stable but not booming. Established organizations and consistent economic development efforts continue to play an important role in building a strong, resilient regional economy.

Recent economic data reinforces the region's overall economic strength while also highlighting differences between the two counties. Real GDP in the CAG region increased from approximately $11.2 billion in 2020 to $14.6 billion in 2024, measured in chained 2017 dollars, a 30.0 percent increase. Pinal County real GDP increased 34.5 percent during the period, compared with 5.1 percent growth in Gila County. Between 2023 and 2024 alone, regional real GDP grew 9.4 percent, including 10.7 percent growth in Pinal County and 1.0 percent in Gila County.

The employment base has also expanded and shifted somewhat toward private-sector and goods-producing employment. In 2025, the CAG region supported approximately 95,475 nonfarm jobs. Private-sector employment accounted for 72.1 percent of regional jobs, and goods-producing industries accounted for 17.5 percent. In the 2020-2025 CEDS, private employment accounted for 69.3 percent, goods-producing employment for 14.2 percent, and government for 30.7 percent of regional employment. The government's share is approximately 27.9 percent in 2025. These changes indicate an expanding private-sector and goods-producing employment base, although government remains an important regional employer.

From traditional mining to expanding industrial corridors, the CAG region is undergoing economic transformation. Over the past five years, key manufacturing companies such as Kohler and Procter & Gamble have established major operations in the region. The region has also attracted semiconductor suppliers and related businesses, including Chang Chun, NRS Logios, KPPC Advanced Chemicals, Solvay, and LCY. These companies are creating new jobs and helping diversify the regional economy. The region's outstanding transportation connectivity, UPRR, and access to three major airports are key reasons manufacturing and logistics companies choose to locate in the CAG region.

Tourism is another source of economic resiliency and diversification. Tourism has moved from recovery to expansion since the 2020-2025 CEDS was adopted. Spending is now above the pre-pandemic peak. Direct travel spending in the CAG region reached approximately $1.36 billion in 2024, up 65.3 percent from $821 million in 2020. Current spending is approximately 24 percent above the region's 2019 pre-pandemic peak of $1.10 billion.

Transportation and Infrastructure: Major interstates, freeways, and transcontinental railroads are expanding, connecting the region to major markets. As a result, much of the region is within a one-day truck haul of major markets and international ports. Regional general aviation airports, Phoenix-Mesa Gateway Airport, Pinal Airpark, and international airports in Phoenix and Tucson are economic assets.

Rail is an important asset to support regional economic development. The region's Class 1 railroad, UPRR, provides coast-to-coast service for various commodities. The region also has Copper Basin Railroad and Magma Railroad, which provide short-line service. OmniTrax now operates in Central Arizona and is working to establish multi-modal operations.

The region has made great strides in improving broadband infrastructure, though work continues in rural areas as it collaborates with service providers (carriers) to extend broadband service in accordance with the last-mile plans. Broadband availability has become a significant infrastructure asset in much of the region. As of December 31, 2025, 97.2 percent of residential broadband-serviceable locations in Pinal County had terrestrial fixed broadband service available at advertised speeds of at least 100/20 megabits per second (Mbps).[1] This is comparable to availability in Maricopa County (98.6 percent) and Pima County (98.4 percent). Gila County's availability was lower at 83.2 percent, showing that broadband is both a regional infrastructure strength and an ongoing rural infrastructure need.

Livability: The region has abundant natural resources, recreational amenities, historic areas, and beautiful downtowns that attract visitors and residents. They play an important role in defining the region's livability. The region offers a variety of housing options. Home values are comparatively lower than the statewide median, although affordability remains a challenge for many households.

Housing and homeownership remain important components of regional livability, although growth is increasing housing pressures in some communities. Approximately 81.2 percent of occupied housing units in the CAG region were owner-occupied during 2020-2024, substantially above Arizona's 67.4 percent and the national rate of 65.2 percent. Median values for owner-occupied housing were approximately $269,400 in Gila County and $349,000 in Pinal County, compared with $394,500 statewide. These characteristics, combined with the region's natural and recreational amenities and distinctive communities, contribute to quality of place.

Labor Force and Education: Pinal County's growing population and Gila County's stable population, along with proximity to Phoenix and Tucson, provide access to an available workforce.

The regional labor force has expanded along with population and employment growth. In 2025, the CAG region had a civilian labor force of approximately 251,733 people, including 229,122 in Pinal County and 22,611 in Gila County. The regional unemployment rate was approximately 4.4 percent, close to Arizona's 4.3 percent and the national rate of 4.2 percent. Educational data also show that basic educational attainment is comparable with statewide and national levels: approximately 89.3 percent of CAG residents age 25 and older have a high school diploma or higher, compared with 89.4 percent statewide and 89.6 percent nationally.

Central Arizona College (CAC) in Pinal County responds to talent needs for legacy and emerging business and industry; provides degrees and certificates for skilled trades and traditional professions such as

[1] Current Federal Communications Commission (FCC) Broadband Data Collection estimates are not directly comparable with broadband percentages reported in the prior CEDS because the FCC's methodology, denominator, and service threshold have changed.

nursing and education; and offers university transfer opportunities. Creating bachelor's degrees at community colleges will also enhance offerings. Newly accredited Gila Community College is developing its curriculum to meet the needs of Gila County businesses and industry. Pre-K – 12 institutions throughout the region are also integrating career awareness and career exploration programs to start talent development with younger students, including career technical education (CTE) in high schools. Central Arizona Vocational Institute of Technology (CAVIT) in Pinal County and Cobre Valley Institute of Technology (CVIT) in Gila County are expanding high school training and certification. Access to the three state universities is also an asset.

WEAKNESSES

Housing: Growth is increasing pressure on housing availability and worsening household cost burdens. In the 2022 Statewide Needs Assessment Survey conducted by the University of Arizona Cooperative Extension, 91 percent of Pinal County respondents rated affordable housing as extremely or very important when asked about top priorities. The Pinal County Housing Needs Assessment provides detailed and comprehensive analysis of regional housing. Gila County does not have a County Housing Needs Assessment but does have a Continuum of Care Program that collects detailed housing needs information from individuals and households. Gila County continually identifies availability of safe, affordable housing as extremely important.

Current data indicate that housing challenges differ across the CAG region. Pinal County's rapid population growth is pressuring housing supply. The county had approximately 0.394 housing units per resident during 2020-2024, the third-lowest ratio among Arizona counties. By comparison, Arizona had approximately 0.433 housing units per resident.

Housing cost burden is also a concern, particularly in Gila County. Approximately 35.3 percent of Gila County homeowners with a mortgage spend 30 percent or more of household income on housing costs, compared with 29.9 percent in Pinal County and 27.5 percent statewide. Across the two counties combined, about 30.4 percent of CAG region homeowners with a mortgage are cost-burdened. The data suggest that Pinal County's main challenge is accommodating rapid growth and housing demand, while Gila County faces significant affordability and workforce-housing challenges despite a much slower population growth rate.

Costs: As Pinal County continues to grow quickly, development costs, including land acquisition and infrastructure construction costs, are rising. In more rural areas, limited developable land supply affects overall development costs.

Property tax rates are also higher in the region. Arizona Department of Revenue's 2024 countywide average property tax rates were $12.67 per $100 of assessed value in Gila County and $12.65 in Pinal County, compared with $10.28 in Maricopa County and $10.67 statewide.

Infrastructure: Regional collaboration to address flood control issues is currently lacking. As recently demonstrated in Gila County, devastating flooding is a major concern, causing infrastructure, business, and life losses. Regional transportation planning is also critical in both counties. The Pinal Regional

Transportation Authority (PRTA) was established in 2015 by the Pinal County Board of Supervisors as a public improvement and taxing subdivision under Arizona law (Title 48, Chapter 30) to manage multi-jurisdictional transportation planning and funding. The PRTA was created to develop a Regional Transportation Plan and provide a framework for a balanced, countywide transportation system, including roads, transit, and multimodal infrastructure. Pinal County began work on a regional transportation plan and aimed to bring it to voters for approval in 2028. The PRTA Board suspended work on the plan because of financial constraints and its inability to fund a viable 20-year plan. In 2026, the PRTA's future and the regional plan remain unclear. Although improvements are being made, transportation congestion along the I-10 corridor continues to affect the region. Additionally, roadway congestion within communities such as San Tan Valley has occurred as infrastructure has tried to keep up with rapid growth. Regional transportation planning in Gila County also requires improved collaboration to build an effective transportation network.

Arizona is projected to face extreme power needs to keep pace with economic development, remain competitive by keeping energy costs low, and ensure adequate capacity. The two largest power companies serving the region, APS and SRP, predict that they will need to double, if not triple, power systems over the next decade. As these companies work to meet overall system needs, solar, batteries, and natural gas offer opportunities to explore. However, the new Transwestern Pipeline (natural gas) is not expected to increase capacity until the end of 2029, and new nuclear generation is not expected until after 2040. Additional electrical providers include Electrical District 3, Electrical District 4, Trico, and San Carlos Irrigation Project (SCIP).

Labor Force and Education: Labor force participation has improved across the CAG region since 2020, with Pinal County showing the strongest gains. Labor force participation in both Pinal and Gila Counties remains below statewide and national levels. In the 2022 Statewide Needs Assessment, over 90 percent of respondents in both counties cited educational issues (quality K-12 education, recruiting and retaining qualified teachers, and improving graduation rates) as extremely or very important to address.

Although participation has improved, labor force participation remains a significant constraint. During the 2020-2024 American Community Survey (ACS) period, approximately 53.2 percent of the CAG population age 16 and older participated in the labor force, compared with 60.6 percent statewide and 63.5 percent nationally. The regional rate increased from 50.2 percent in the previous ACS period. Pinal County increased from 50.6 percent to 53.9 percent, while Gila County increased from 46.6 percent to 47.2 percent. The participation gap therefore remains substantial even as unemployment rates remain relatively low. The below-average labor force participation remains a regional issue. In addition to the low labor force participation rate, Gila County has a significant older population, with about 36.1 percent of residents aged 55 or older. These conditions underscore the need to replace workers, retain workers, develop skills, and increase participation among individuals currently outside the labor force.

The larger educational gap occurs in post-secondary attainment. Approximately 22.1 percent of CAG residents age 25 and older have a bachelor's degree or higher, compared with 33.3 percent statewide

and 35.7 percent nationally. Bachelor's degree attainment is about 18.7 percent in Gila County and 22.5 percent in Pinal County.

Wage levels also indicate a challenge. Average wages per employee in the CAG region were approximately $59,200 in 2025, about 18.7 percent below the Arizona average of $72,800 and 25.2 percent below the U.S. average of $79,100. Regional wages nevertheless increased approximately 26.7 percent in nominal terms between 2021 and 2025. These trends reinforce the need to expand the talent pipeline and attract and grow higher-wage employment opportunities.

OPPORTUNITIES

Business Diversification: Arizona's expanding, diversified economy, focused on advancing technology- and export-based industries, has a ripple effect across the CAG region. Arizona Commerce Authority (ACA), the statewide economic development office, actively works to attract out-of-state companies to establish new operations in Arizona, help existing companies expand, and partner with entrepreneurs to create new businesses and commercialize new technologies. Working closely with state and regional economic development organizations such as Greater Phoenix Economic Council (GPEC), Pinal Partnership, and Copper Corridor Economic Development Corporation, as well as local economic development departments, helps the region assess its assets and identify opportunities. Traditional industries like agriculture and mining continue to play a significant role, but industry diversification is increasingly driving economic impact.

ARIZONA TARGET SECTORS

When recruiting businesses to Arizona, growing Arizona's existing businesses, and creating new businesses, the ACA focuses on key sector opportunities.

- Aerospace & Defense
- Manufacturing
- Bioscience, Medtech, & Healthcare
- Business & Financial Services
- Film & Digital Media
- Technology & Innovation

Recent employment trends signal continued economic diversification. Between 2021 and 2025, the private-sector share of CAG nonfarm employment increased from 69.3 percent to 72.1 percent, and the goods-producing share increased from 14.2 percent to 17.5 percent. In 2025, Pinal County had approximately 7,100 manufacturing jobs and 6,800 mining and construction jobs. The growing manufacturing and goods-producing base creates opportunities to attract suppliers, build business-to-business linkages, support entrepreneurship, and add value to existing industries.

Significant areas within CAG continue to experience high retail leakage due to their proximity to major metropolitan areas. A recent Pinal County study estimated retail leakage of over $1 billion into Maricopa County (within a seven-mile radius of the San Tan Valley Walmart). As a newly incorporated city experiencing tremendous growth, San Tan Valley needs to attract additional retail and restaurants to serve the community and keep those revenues in the Town of San Tan Valley and Pinal County.

Transportation: The CAG region has developed along transportation corridors, with I-8, I-10, and US 60 serving the region's major population centers. Additional highways, such as SR 87, SR 77, SR 188, and SR 287, connect many of the remaining population centers. The region will benefit from future transportation projects currently being planned or under consideration, including the East-West Corridor (20-mile high-capacity corridor), North-South Corridor (SR 505, a proposed 55-mile route in Pinal County to improve regional connectivity), I-11 Project, I-10 widening from SR 202 to SR 387, improvements to SR 347, SR 24, and SR 260, rail improvements, and major interchange and roadway projects.

Tourism Growth: Statewide tourism is a cornerstone of Arizona's economy, serving as the state's top export industry and a major driver of jobs, tax revenue, and economic diversification, according to the Arizona Tourism Strategy. Tourism has moved beyond post-pandemic recovery and is now expanding beyond its previous peak in the CAG region. Direct travel spending totaled approximately $1.36 billion in 2024, including $981.6 million in Pinal County and $375.8 million in Gila County. Regional spending increased 65.3 percent from 2020 and was approximately 23.9 percent above the 2019 pre-pandemic peak. In 2024, major visitor spending categories included food service ($424.2 million), arts, entertainment and recreation ($234.0 million), retail ($188.3 million), accommodation ($161.1 million), local transportation and gas ($127.5 million), and food stores ($108.6 million). These expenditures show tourism's role in supporting local businesses and diversifying the regional economy.

In 2023, 45.7 million visitors spent $29.3 billion in Arizona, with 2024 data showing $29.7 billion in direct travel spending. Tourism directly supported 187,000-194,000 jobs in 2023-2024, with indirect and induced employment reaching 324,000 jobs statewide. Visitor spending generated $4.2-$4.3 billion in combined state, local, and federal tax revenue, equating to about $889 in annual tax savings per Arizona household. Tourism generates over $81 million in travel spending entering Arizona's economy each day. Additionally, a University of Arizona Cooperative Extension report finds that visitors to state parks boost Arizona's economy by $555 million. Tourism is projected to continue growing, and the CAG region's tourism amenities, state parks, events, and attractions will add to overall economic benefit and employment growth.

THREATS

Environmental: The CAG region has recent (e.g., Gila County flooding) and historical experience with natural disasters (e.g., flooding, drought, and fires) and the havoc and disruption created. Natural disasters can cause devastating loss of life and property, and community recovery can take years. Many communities in Gila and Pinal counties experienced significant flooding in recent years (1983, 1993, 2007, 2020, and 2021). Ensuring the region can respond quickly and rebuild effectively is critical. Coolidge Dam poses a unique flooding threat to Pinal County and downstream communities.

Arizona and the CAG region depend on sustainable water supplies, which require vigilant, innovative management. The Arizona Department of Environmental Quality oversees water quality and enforces federal environmental standards. The Arizona Department of Water Resources oversees surface water and groundwater use, which are legally distinct but physically interconnected. Clean, abundant water availability and access are the lifeblood of the CAG region's sustainability. The water issue goes far

beyond Arizona's borders and has become increasingly political. How the water issue is resolved over the next few years will greatly impact the CAG region.

The CAG region faces air quality challenges mainly from dust, particulate matter, ozone, and occasional wildfire smoke, with health risks varying by pollutant levels and individual sensitivity. As a result, the arid environment and human activities, including construction and open burning, contribute to elevated PM10 levels. Air quality is closely monitored and will shape future economic development efforts.

Social Issues: Reduced funding for education and employee training could limit the region's ability to develop the workforce skills employers need, which is a real concern. Arizona's tax structure and budget priorities will continue to affect the state and region's ability to diversify the economy. The growing statewide healthcare crisis (e.g., access to and cost of healthcare) and the need to maintain adequate access throughout the region will affect economic development efforts.

Income and wage gaps may compound workforce, housing, and quality-of-life challenges. Per capita personal income in the CAG region was approximately $51,400 in 2024, compared with $65,800 statewide and $73,200 nationally. The regional level was approximately 21.9 percent below Arizona and 29.8 percent below the United States. Similarly, average wages per employee were approximately $59,200 in 2025, below both state and national averages. These income and wage gaps, along with lower labor-force participation and bachelor's-degree attainment, reinforce the need to increase access to higher-quality employment, education, training, and essential services.

Market and Funding Shifts: International market fluctuations, tariff implications, and changing market conditions require the CAG region to adjust and adapt. Diligent tracking and evaluation are required to position the region to pivot effectively.



STRATEGIC ACTION PLAN

The CAG Strategic Action Plan presents the region's roadmap for future economic development and improvements to regional livability. Although no plan can anticipate every future challenge, the CAG Strategic Action Plan provides a framework for adjusting priorities and responding effectively to evolving state, national, and global trends, environmental challenges, and industry changes. Success requires collaboration among the region's public and private partners to prioritize and implement projects using the CEDS Strategic Action Plan.

Regional Economic Vision: Create a thriving, forward-directed region connected to the state, national, and global economies but rooted in its historic foundation.

CAG Mission Statement: Encourage local units of government to join and cooperate to improve the health, safety, and general welfare of their citizens; plan for future regional development; and develop and implement constructive, workable policies and programs to meet the needs of the regional economy.

Economic Resiliency: Economic resiliency is a key component of the economy's ability, at the local, business, or regional level, to anticipate, withstand, recover from, and adapt to environmental and economic disruptions. The identified focus areas are targeted initiatives designed to ensure the CAG region can adapt to hazards and economic shocks. This approach embeds economic resiliency in action strategies that will guide strategy refinement over time, track progress, and ensure updates, changes, or projects to keep resiliency as the central pillar of regional action.

Four focus areas provide the framework for the Strategic Action Plan and evolved from the updated SWOT Analysis. They serve as "guideposts" for advancing the region's economy. The graphic on the following page illustrates the direct correlation between the SWOT analysis's identified strengths, weaknesses, opportunities, and threats and the four strategic focus areas. Each focus area supports the regional vision and CAG's mission. Future funding projects will align with the focus areas.

1. Dynamic Business Environment
2. Livability and Housing
3. Infrastructure and Site Readiness
4. Ready Workforce

DEFINITIONS

Focus Areas: The foundational structure to move the region toward its vision. Within each focus area are:

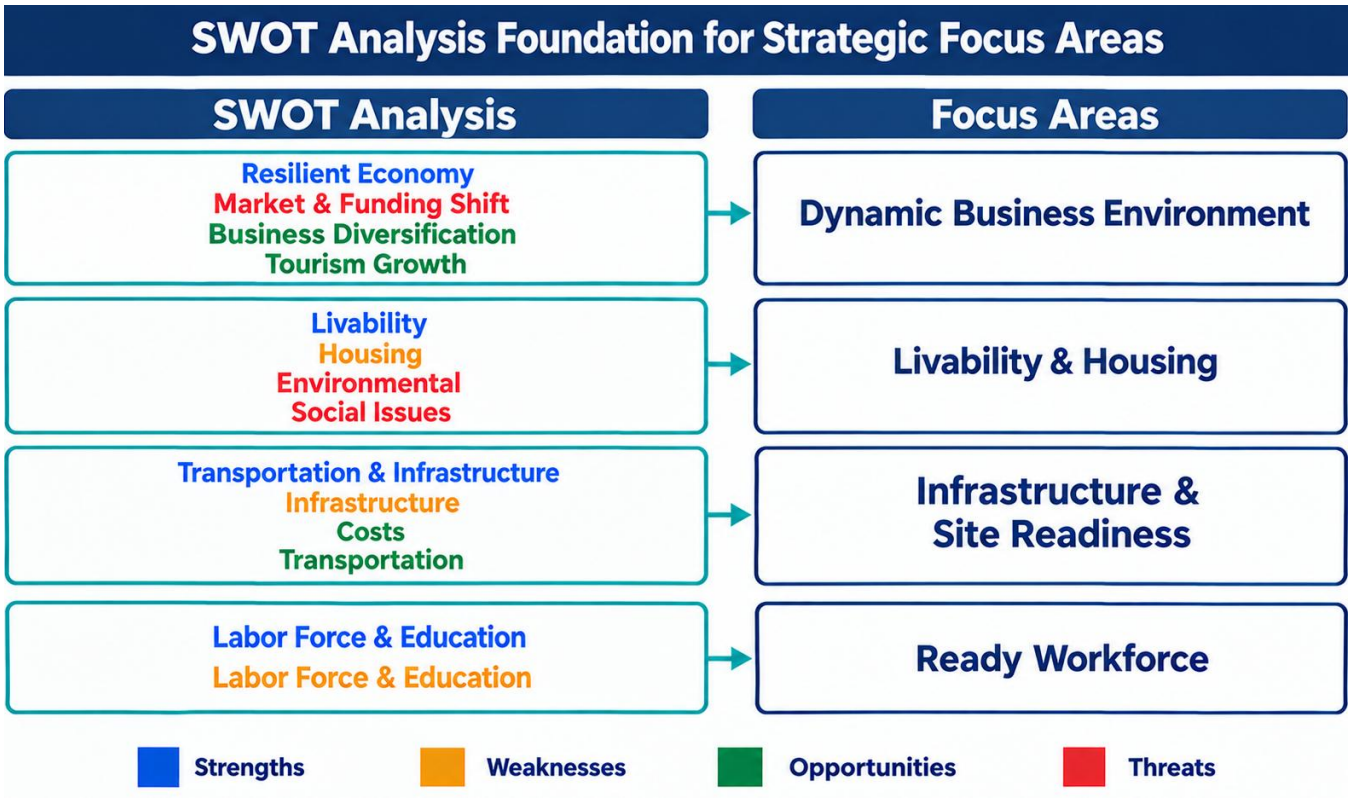
Target Opportunities: Subareas directly related to achieving the focus area.

Timeframes: Period for substantial effort to occur related to the associated target opportunity.

Goals: Intended outcomes for each target opportunity.

Objective: Specific strategies to achieve the associated goal.

Figure 2: SWOT Analysis Foundation for Strategic Focus Area



FOCUS AREA #1: DYNAMIC BUSINESS ENVIRONMENT

The communities and two counties within the CAG region have laid a strong foundation for growth and economic development. The CAG region is working to build a more diversified, resilient economy while supporting industries such as mining and agriculture, which have long been the region's economic foundation. Ultimately, building a dynamic business environment focuses on attracting and retaining quality jobs. A quality job pays enough to cover a family's basic needs, including healthcare, with extra money for emergencies and savings.

Target Opportunity: Legacy Industry Support and Expansion

Timeline: Short-term (1-3 years/Ongoing)

1.1 **Goal:** Maintain and support historical regional legacy industries (mining, agriculture, etc.).

1.1.a. **Objective:** Monitor legislation that affects the future of mining, agriculture, and supporting industries.

1.1.b. **Objective:** Promote programs at community colleges and other workforce training entities that fill existing gaps and support the needs of legacy industries' aging workforce, specifically trades such as welders, electricians, mechanics, and heavy equipment operators.

Target Opportunity: Economic Diversification

Timeline: Long-term (5+ years/Ongoing)

1.2 **Goal:** Diversify the economy by leveraging current strengths to attract business and support entrepreneurial startups.

- 1.2.a. **Objective:** Identify and encourage spin-offs and/or support industries that can use the existing workforce.
- 1.2.b. **Objective:** Market the region to existing business suppliers, bringing them closer to the end user to reduce transportation costs.
- 1.2.c. **Objective:** Facilitate regional collaborative efforts to encourage new businesses to locate and/or expand within the region.
- 1.2.d. **Objective:** Support the establishment of Opportunity Zones and promote investment.

Target Opportunity: Existing Business Support and Readiness

Timeline: Mid-term (3-5 years/Ongoing)

1.3 **Goal:** Support efforts for effective regional and community planning with business-supportive zoning and regulations.

- 1.3.a. **Objective:** Develop subregional studies and plans to strengthen specific areas within the region.

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

- 1.4.a. **Objective:** Organize workshops to train entrepreneurs in online business.

1.5 **Goal:** Develop resources to support existing small and medium-sized businesses.

- 1.5.a. **Objective:** Enhance, create, and expand access to tools in areas such as financial management, marketing, workforce development, and procurement.

Target Opportunity: Tourism and Destination Recreation

Timeline: Mid-term (3-5 years/Ongoing)

1.6 **Goal:** Develop and promote the region's unique natural assets, existing attractions, and quality of life to draw visitors.

- 1.6.a. **Objective:** Create a coordinated regional effort to attract visitors.
- 1.6.b. **Objective:** Support and encourage individual communities in their heritage preservation activities.

1.7 **Goal:** Support efforts to preserve and enhance regional natural amenities.

- 1.7.a. **Objective:** Support efforts to preserve natural views and landscapes.
- 1.7.b. **Objective:** Mitigate effects of non-native species to protect existing flora and fauna.

FOCUS AREA #2: LIVABILITY AND HOUSING

Overall, residents rate the region highly for quality of life and being a great place to raise families. From newly incorporated cities such as San Tan Valley to historic mining communities like Globe and Miami, residents choose the region for a variety of reasons but agree there is always room for improvement. Needs and priorities may shift by geography and location, but maintaining and enhancing livability and providing safe, affordable housing are common themes.

Target Opportunity: Adequate Water Supply

Timeline: Mid-term (3-5 years/Ongoing)

2.1 **Goal:** Secure a reliable water supply for CAG communities while pursuing new opportunities.

- 2.1.a. **Objective:** Support efforts to ensure new development meets assured water supply standards.
- 2.1.b. **Objective:** Support development of new water resources for the region.
- 2.1.c. **Objective:** Support regional planning, conservation, and management of these resources.
- 2.1.d. **Objective:** Continue to ensure that the region's water needs are considered as the state and federal governments develop water supply policies.
- 2.1.e. **Objective:** Support improvement of wastewater capture and treatment.

Target Opportunity: Workforce Housing

Timeline: Short-term (1-3 years/Ongoing)

2.2 **Goal:** Expand access to housing for workers and residents across the region.

- 2.2.a. **Objective:** Support the increase in supply and diversity of housing types near employment centers, services, and transportation corridors.
- 2.2.b. **Objective:** Support the development and preservation of housing affordability for workers at a range of income levels.
- 2.2.c. **Objective:** Encourage infill development and the reuse of vacant or underutilized properties where infrastructure already exists.
- 2.2.d. **Objective:** Support and monitor the housing supply, costs, vacancies, and workforce needs to help guide regional decisions.

Target Opportunity: Healthcare

Timeline: Short-term (1-3 years/Ongoing)

2.3 **Goal:** Ensure access to quality healthcare services and facilities.

- 2.3.a. **Objective:** Promote a healthier population by increasing opportunities to meet with doctors and specialists.
- 2.3.b. **Objective:** Encourage decreasing transportation costs associated with healthcare.
- 2.3.c. **Objective:** Promote telemedicine as a healthcare option throughout the CAG region.

FOCUS AREA #3: INFRASTRUCTURE AND SITE READINESS

A comprehensive infrastructure network is the skeleton that helps communities and regions operate efficiently. Adequate water, wastewater, flood control, broadband, and energy are essential for growing strong, resilient communities. Growth puts pressure on all of these, and we must address it to ensure future capacity.

Additionally, ensuring that people and goods can move safely within and through the region on a connected, comprehensive transportation network is critical. Much of the CAG region is situated along current and future major freeways and transportation corridors that are crucial for economic growth. More rural areas within the region depend on a roadway network that brings visitors to their communities, enables business access, and moves goods and services.

Target Opportunity: Broadband

Timeline: Short-term (1-3 years/Ongoing)

3.1 **Goal:** Support expanding broadband capacity in urban areas while expanding existing networks into rural communities to increase the region's resiliency.

- 3.1.a. **Objective:** Encourage resilient/redundant broadband networks within communities.
- 3.1.b. **Objective:** Explore a variety of broadband distribution methods for last-mile connections.

Target Opportunity: Water and Wastewater

Timeline: Short-term (1-3 years/Ongoing)

3.2 **Goal:** Maintain and expand water and wastewater networks to meet the needs of businesses and residents.

- 3.2.a. **Objective:** Work with public and private water providers to evaluate and benchmark current water and wastewater networks.
- 3.2.b. **Objective:** Work with public and private water providers to ensure that costs of service include future replacement and maintenance costs.
- 3.2.c. **Objective:** Communicate available capacity to prospective businesses.
- 3.2.d. **Objective:** Support expansion of wastewater treatment capacity.
- 3.2.e. **Objective:** Support expansion of recharge and direct water reuse.

Target Opportunity: Energy

Timeline: Short-term (1-3 years/Ongoing)

3.3 **Goal:** Ensure the region has energy resources to meet future demand and capitalize on economic opportunities.

- 3.3.a. **Objective:** Work closely with APS, SRP, and electrical districts to plan effectively, ensure power needs keep pace with economic development to keep Arizona competitive.
- 3.3.b. **Objective:** Continue pursuing energy opportunities such as solar, wind, and battery storage as they develop within the region, and monitor nuclear generation potential.

Target Opportunity: Comprehensive Transportation Network

Timeline: Short-term (1-3 years/Ongoing)

3.4 **Goal:** Expand existing road networks to promote flow from population centers to employment centers.

- 3.4.a. **Objective:** Create opportunities for traffic to travel through the region and create pass-through commerce.
- 3.4.b. **Objective:** Develop new funding streams for transportation improvements and new roads through regional transportation planning documents such as the Pinal County Regional Transportation Plan.
- 3.4.c. **Objective:** Coordinate land use and local economic development with transportation improvements along key corridors.
- 3.4.d. **Objective:** Provide political input and support for plans or legislation that improve transportation options throughout the region (e.g., formal resolutions by cities and towns for freeway-preferred alignments, such as the North-South Corridor via ADOT).
- 3.4.e. **Objective:** Continue to develop and support future transportation projects currently being planned or under construction, including SR 505 (a proposed 55-mile route in Pinal County to improve regional connectivity), I-11 Project, I-10 widening from SR 202 to SR 387, improvements to SR 347, SR 24, and SR 260, Sonoran Desert Parkway, rail improvements, and major interchange and roadway projects.

3.5 **Goal:** Maintain current roadways and coordinate with the U.S. Department of Transportation, the Federal Highway Administration, the Arizona Department of Transportation on state highways, and the Maricopa Association of Governments on regional transportation connections.

- 3.5.a. **Objective:** Seek funding to improve existing roadways.
- 3.5.b. **Objective:** Work with existing transportation groups to lobby for transportation projects with a strong economic impact.
- 3.5.c. **Objective:** Maintain current roadways and coordinate with ADOT on transportation corridors, with I-8, I-10, and US 60 serving the region's major population centers. Additional highways, such as US 87 and SR 77, SR 188, and SR 287, connect many of the remaining population centers.

3.6 **Goal:** Expand multimodal transportation options including rail connectivity and development of regional airports.

- 3.6.a. **Objective:** Support the planning and development of new rail infrastructure or services.
- 3.6.b. **Objective:** Collaborate with public/private airports to support economic development opportunities.

Target Opportunity: Disaster Preparedness

Timeline: Short-term (1-3 years/Ongoing)

3.7 **Goal:** Cooperate as a region to decrease the impact of natural disasters on communities.

- 3.7.a. **Objective:** Expand coordination and training to ensure disaster preparedness and effective response.
- 3.7.b. **Objective:** Coordinate flood control within CAG communities and surrounding counties.
- 3.7.c. **Objective:** Work with the Federal Emergency Management Agency (FEMA) to identify potential projects for flood control and management.
- 3.7.d. **Objective:** Coordinate with regional flood control districts to reduce business flood risks.
- 3.7.e. **Objective:** Work with federal, state, local, and district fire units to prepare for, mitigate, and respond to fires.

FOCUS AREA #4: READY WORKFORCE

A ready workforce supports the region's economic competitiveness, business growth, and residents' access to high-quality, sustainable employment. Workforce readiness requires more than meeting current hiring needs. The goal is not simply to prepare residents for available jobs, but to establish pathways that allow residents to enter employment, obtain industry-recognized credentials, advance to higher-skilled occupations, and remain economically connected to their communities. It includes preparing residents for emerging opportunities and changing technology, helping existing workers advance, and ensuring that employers and residents can access responsive education, training, employment, and support services. Digital literacy and information technology skills are increasingly cross-cutting capabilities that support industry demands. The workforce system should move beyond short-term job placement and emphasize career pathways that connect career awareness, education, training, credentials, work-based learning, employment, and advancement.

Priority industries and occupational areas should include healthcare and health services, skilled trades and construction, mining and industrial occupations, government and public services, transportation and logistics, tourism and hospitality, information technology, and other emerging industries identified through labor market information and employer input.

The Pinal County Workforce Development Board and Northeastern Arizona Local Workforce Development Board, together with their ARIZONA@WORK partners, provide a foundation for collaboration with employers, economic development organizations, educational institutions, and community and tribal partners. These partnerships should align workforce strategies with business attraction, retention, and expansion support for both established and emerging industries and strengthen pathways from career awareness through training, employment, and advancement.

Regional priorities include employer-informed workforce planning, accessible career pathways, expanded training capacity, removing barriers to workforce participation, and adapting to changing technology and economic conditions. Strategies should reflect differences among the region's communities while advancing shared goals for business competitiveness and economic self-sufficiency. For example, Gila County includes communities with different economic foundations, including mining

and industrial communities increasingly connected to tourism, recreation, healthcare, government, and service industries. A successful workforce strategy must recognize these differences while connecting residents and employers to regional workforce resources.

The CEDS supports and complements local workforce, education, and economic development plans as updated. It provides a framework for partners to develop community-specific initiatives, coordinate investments, and evaluate results without prescribing a single service-delivery model.

Target Opportunity: Workforce Development

Timeline: Short-term (1-3 years/Ongoing)

4.1 **Goal:** Strengthen an employer-driven workforce system that supports business attraction, retention, and expansion while preparing residents for current and emerging employment opportunities.

- 4.1.a. **Objective:** Maintain and use coordinated workforce intelligence by combining existing labor-market analyses, employer input, training-capacity information, and economic development activity to identify skill needs and guide investment.
- 4.1.b. **Objective:** Strengthen industry partnerships among employers, workforce boards, economic developers, and education and training providers to validate skills, shape training, and connect qualified workers with employment.
- 4.1.c. **Objective:** Integrate workforce planning into business development efforts, including the needs of small businesses, established industries, and emerging employers, with preparation aligned to anticipated hiring schedules.
- 4.1.d. **Objective:** Prioritize workforce investments that lead to sustainable employment, career advancement, and higher wages while supporting both established industries and emerging economic opportunities.

4.2 **Goal:** Expand connected education, training, and work-based learning pathways that help youth and adults enter, advance, and transition in high-quality employment.

- 4.2.a. **Objective:** Strengthen connections among K–12 career awareness, career and technical education, adult education, and post-secondary training, including pathways for out-of-school youth and adults returning to education or employment.
- 4.2.b. **Objective:** Expand employer-connected learning opportunities, including internships, paid work experience, on-the-job training, pre-apprenticeships, and registered apprenticeships.
- 4.2.c. **Objective:** Increase completion of industry-recognized credentials and progression into employment and advancement by supporting industry-recognized portable and stackable credentials, career ladders, wage-based learning, and clear connections between successive training and career opportunities.

4.3 **Goal:** Improve residents' ability to access and successfully participate in education, training, and employment throughout the region.

- 4.3.a. **Objective:** Expand access through community-based, mobile, and virtual services tailored to local conditions, including rural communities, and collaborate with tribal partners.

4.3.b. **Objective:** Encourage shared-use training facilities and partnerships among employers, educational institutions, workforce organizations, and community organizations to maximize existing resources.

4.3.c. **Objective:** Strengthen coordinated referrals and supportive-service partnerships that address transportation, childcare, digital access, accessibility, and other barriers to completing training and sustaining employment.

4.3.d. **Objective:** Engage residents whose talents are underutilized or who face barriers to employment by connecting outreach, career navigation, preparation, and employer engagement, rather than treating them as separate activities.

4.4 **Goal:** Develop and sustain accessible training capacity and workforce infrastructure that respond to demonstrated employer and community needs.

4.4.a. **Objective:** Support the development, expansion, and modernization of training facilities, laboratories, equipment, technology, and instructional capacity where workforce demand and gaps in existing resources justify it.

4.4.b. **Objective:** Encourage shared-use and collaborative training approaches among educational institutions, employers, workforce organizations, and community partners to extend access and make effective use of existing assets.

4.4.c. **Objective:** Coordinate public, private, and philanthropic investment in workforce capacity, with attention to long-term staffing, operations, maintenance, and each funding source's requirements.

4.5 **Goal:** Use high-impact training and workforce intelligence to improve training investments.

4.5.a. **Objective:** Use labor market information, employer feedback, occupational projections, training outcomes, and Arizona's High-Impact Training (HIT) data to identify and prioritize effective training opportunities.

4.5.b. **Objective:** Support training programs with strong completion, credential attainment, employment, and wage outcomes when aligned with local employer demand.

4.5.c. **Objective:** Continuously evaluate workforce investments and adjust training priorities as employer needs, technologies, and economic conditions change.

4.6 **Goal:** Help workers and employers adapt to changing technologies, business conditions, and economic disruptions while sustaining employment and career advancement.

4.6.a. **Objective:** Expand incumbent-worker training and reskilling that help businesses remain competitive, and employees advance as technologies and occupational requirements change, including digital and artificial intelligence literacy where relevant.

4.6.b. **Objective:** Coordinate layoff-aversion, rapid-response, and reemployment strategies that connect affected workers with transferable skills, appropriate training, and new employment opportunities.

4.6.c. **Objective:** Support workers transitioning between occupations or industries through career navigation, skills assessment, training, work-based learning, and employer connections.

4.6.d. **Objective:** Strengthen efforts to retain young workers and skilled residents by increasing awareness of local career opportunities and connecting residents to education, training, employment, and advancement opportunities within the region.

4.6.e. **Objective:** Use employer feedback and workforce outcomes to improve services and training, adjust approaches as demand changes, and expand effective practices across willing partners.

4.7 **Goal:** Attract and promote growth in companies that provide sustainable living-wage jobs and can use the existing workforce or support workforce training to meet needs.

4.7.a. **Objective:** Identify the data needs and provide local economic developers with workforce data tailored to effective business recruitment.

4.7.b. **Objective:** Support workforce development partners and facilitate ongoing communication/collaboration with existing and prospective businesses.

Target Opportunity: Education

Timeline: Short-term (1-3 years/Ongoing)

4.8 **Goal:** From pre-kindergarten through high school, support career awareness, career exploration, and experiences so all students understand current and future career paths and jobs, and what skills and characteristics they need. These efforts will succeed when educational institutions, business and industry, economic development and workforce organizations, and families work together.

4.8.a. **Objective:** Work with educational institutions, business and industry, economic development, and workforce organizations to co-create programs and experiences appropriate for grade levels.

4.8.b. **Objective:** Strengthen career technical education, work-based learning, internships, and other career-connected learning opportunities to enhance students' exposure to the world of work.

4.9 **Goal:** Recognize the benefits of a skilled, educated workforce that increases economic stability and community sustainability, and initiate action to achieve the region's Arizona post-secondary attainment goal of 60% by 2030. This is the percentage of Arizona residents ages 25-64 who have completed a 2- or 4-year degree or have an active professional certificate or license. This could include education from a technical school, college, or university; military service credentials; or apprenticeships.

4.9.a. **Objective:** Consider subregion collaborations that share geography, economies, or other alignments, including representatives from educational institutions, business and industry, and economic development and workforce organizations. Strategies can be tailored to address differing community needs and resources. An active example is the Copper Corridor Attainment Group.



EVALUATION FRAMEWORK

Implementing the CAG CEDS depends on effective communication with regional, state, and federal partners, as well as public/private/non-profit stakeholders. It serves as the regional economic development strategy, supports economic development at the community and sub-regional levels, and aligns with statewide efforts. The CAG Regional Council, acting as the Economic Development District Board, oversees and monitors CEDS implementation. They are also responsible for coordinating with and reporting regularly to the U.S. Economic Development Administration.

Collaboration among employers, economic development organizations, community and tribal partners, and CAG is critical to align priorities with the CEDS, identify training and programmatic needs, support coordinated initiatives, and contribute available outcome information to annual program reviews. Implementation will respect each partners' governance, responsibilities, and funding requirements.

ACCOUNTABILITY

Implementing the CAG CEDS depends on effective communication with various regional, state, and federal entities. The following are the key responsibilities.

Central Arizona Governments

- Serve as the regional coordinating entity through the Regional Council.
- Provide staff to the EDD, fiscal operations, and contract management.
- Partner with local, regional, and state transportation entities.
- Coordinate with adjacent regional planning entities such as Maricopa Association of Governments and Pima Association of Governments on joint issues.
- Coordinate with state agencies such as Arizona State Land Department and Arizona Department of Transportation regarding joint planning issues in support of the CEDS objectives.
- Address workforce issues in collaboration with the workforce development boards, public, and private sectors.

Economic Development District

- Promote regional workforce development sector strategies and training partnerships that assist business attraction, retention, and expansion.
- Act as the liaison with member communities or organizations regarding economic development.
- Collaborate with Greater Phoenix Economic Council, Arizona Commerce Authority, and regional/local economic development organizations.

- Support the development and expansion of infrastructure that meets EDA funding goals.
- Work closely with local, regional, and statewide transportation planning organizations, metropolitan planning organizations, and various communities on mutual multimodal transportation issues and projects to support economic development efforts.
- Assist in identifying funding sources to support CEDS-related projects or initiatives.
- Represent Central Arizona economic development initiatives at the state and federal levels.
- Support efforts to sustain and grow tourism.
- Strengthen collaboration with state and federal agencies.
- Annually review the CEDS, adopt a work program, and work collaboratively on implementation.
- Every five years, update the CEDS in compliance with EDA requirements.

Community and Tribal Partners

- Coordinate and communicate with economic development organizations related to mutual economic development strategies or projects.
- Coordinate and communicate with the private sector related to mutual economic development strategies or projects.
- Coordinate and communicate with utilities related to mutual economic development strategies and projects.
- Coordinate and communicate with tribal government and economic development organizations related to strategies and projects.



HOW SUCCESS IS MEASURED



The CAG region uses economic performance factors to assess progress toward its goals and objectives and determine how these accomplishments advance its vision. Standard measures of performance include:

- Workforce Statistics
- Unemployment Rates
- Population to Jobs Ratio
- Tourism Spending and Visitations
- Job Creation and New Businesses
- Educational Attainment

The Center for the Future of Arizona (CFA) Arizona We Want Progress Meters are used to track progress on the CEDS implementation. 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. CAG encourages communities within the region to use the progress meters as a benchmark for future success and to support moving the region and state forward. CAG will review and update the CAG-selected Progress Meters annually.

JOBS: Jobs that align with residents' skills, offer advancement and sustainability, and help the economy thrive. Measurements to be tracked include:

- Job Growth
- Average Wages
- Unemployment
- Underemployment
- Labor Force Participation
- Industry-Recognized Credentials Earned

EDUCATION: Equal access to education that prepares students for success in life and work.

- Quality Early Learning
- Reading/Math Scores
- High School Graduation Rate
- Post-secondary Attainment

LIVABILITY & HOUSING: Residents have access to affordable housing, healthcare, and an attainable cost of living.

- Cost of Living
- Cost of Housing
- Housing Availability
- Available Healthcare
- Healthcare Affordability
- Water Use/Projected Demand vs. Availability
- Energy Use/Projected Demand vs. Availability

INFRASTRUCTURE: Basic infrastructure that meets the current and future demand for energy, water, transportation, housing, and communications.

- Water Use/Projected Demand vs. Availability
- Energy Use/Projected Demand vs. Availability
- Access to Broadband
- Commute Times

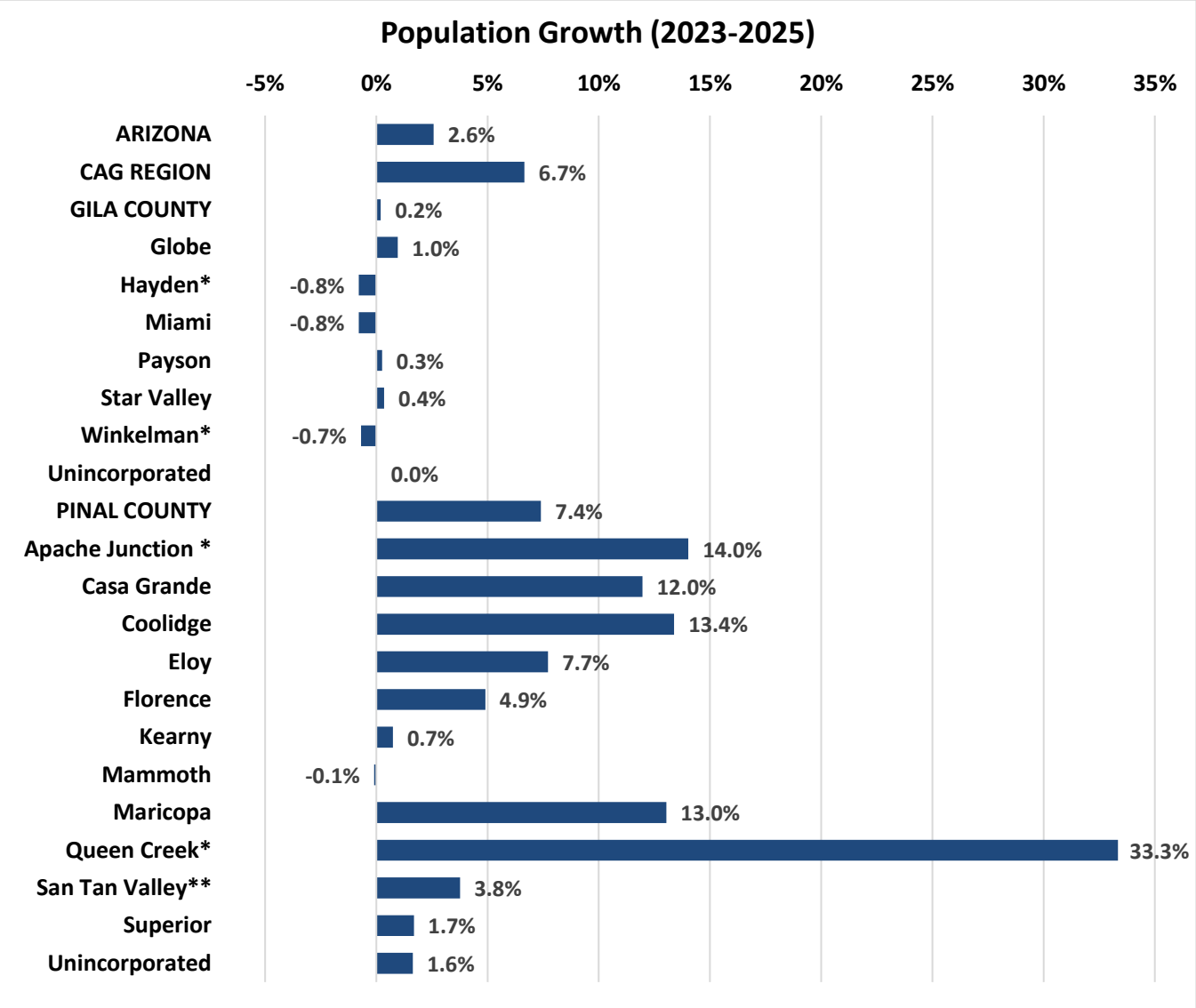


APPENDIX A. Demographic and Economic Overview of CAG Region

POPULATION AND GROWTH

The CAG region's estimated population in 2025 was 555,979, including 502,071 residents in Pinal County and 53,908 in Gila County. About 90 percent of the region's population lives in Pinal County.

Figure A.1: Population Growth, 2023-2025



Source: Arizona Office of Economic Opportunity.

*Incorporated place located in more than one county.

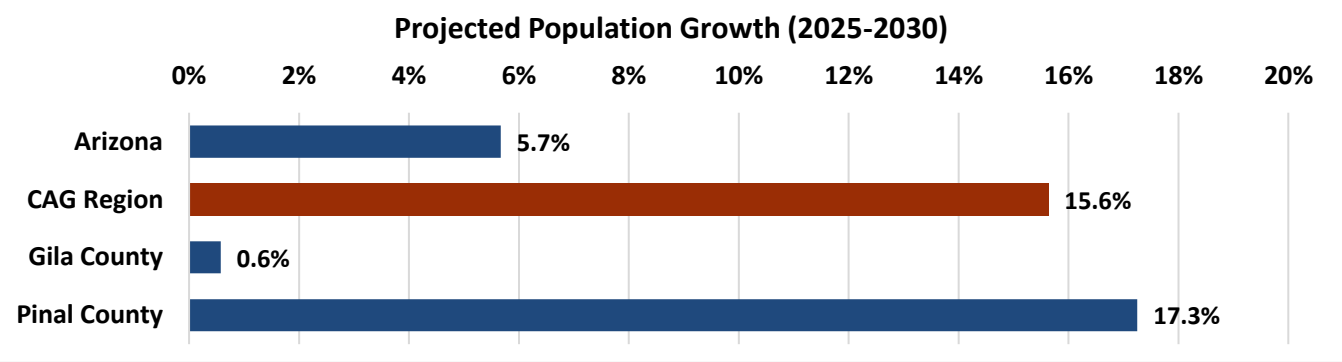
**San Tan Valley value is calculated separately using U.S. Census Bureau American Community Survey (ACS) 5-Year Estimates because Arizona Office of Economic Opportunity (OEO) municipal population estimates were not available for San Tan Valley due to its recent incorporation. San Tan Valley values use the 2019–2023 and 2020–2024 ACS 5-Year Estimates, while the other communities shown in the figure use Arizona OEO population estimates. Because the ACS and OEO use different methodologies and reference periods, San Tan Valley's change should be interpreted as an approximate indicator of recent population growth and is not directly comparable with the OEO-based estimates for other communities.

Note: Pinal County excludes Hayden, Marana, and Winkelman, which, although located partially in Pinal County, have no estimated population within the county.

To avoid distorting the data, we compared post-COVID data from 2023 to 2025. The CAG region grew faster, at 6.7 percent, than the state growth rate of 2.6 percent. Population growth within the region has been highly concentrated in Pinal County. Between 2023 and 2025, the CAG region added 34,720 residents, with 34,612 in Pinal County and 108 in Gila County. Several Pinal County communities grew rapidly, including Queen Creek, Apache Junction, Coolidge, Maricopa, and Casa Grande.

Growth is expected to continue during the CEDS planning period. The CAG regional population is projected to reach approximately 642,915 by 2030, a 15.6 percent increase from 2025. Pinal County is projected to grow about 17.3 percent, while Gila County is projected to remain relatively stable, increasing about 0.6 percent. These contrasting growth patterns create different economic development needs: Pinal County will need growth-related infrastructure and housing, while slower-growing communities will need continued attention to economic opportunity, services, and infrastructure.

Figure A.2: Projected Population Growth, 2025-2030

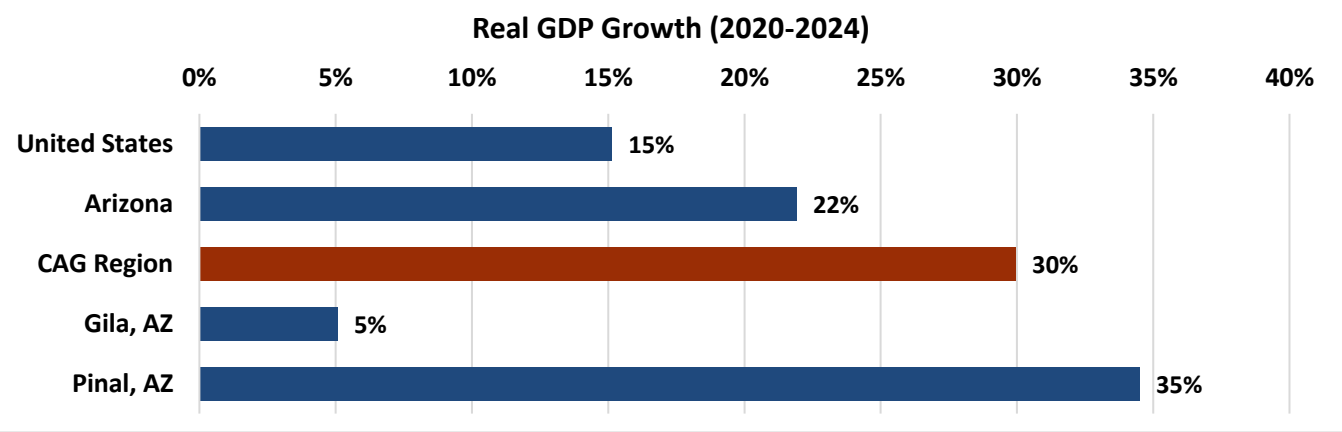


Source: Arizona Office of Economic Opportunity and CAG.

ECONOMIC GROWTH

The CAG regional economy has expanded substantially since 2020. Real gross domestic product (GDP) increased from approximately $11.2 billion in 2020 to $14.6 billion in 2024, measured in chained 2017 dollars. This represents real economic growth of approximately 30.0 percent, compared with 21.9 percent statewide and 15.2 percent nationally during the same period.

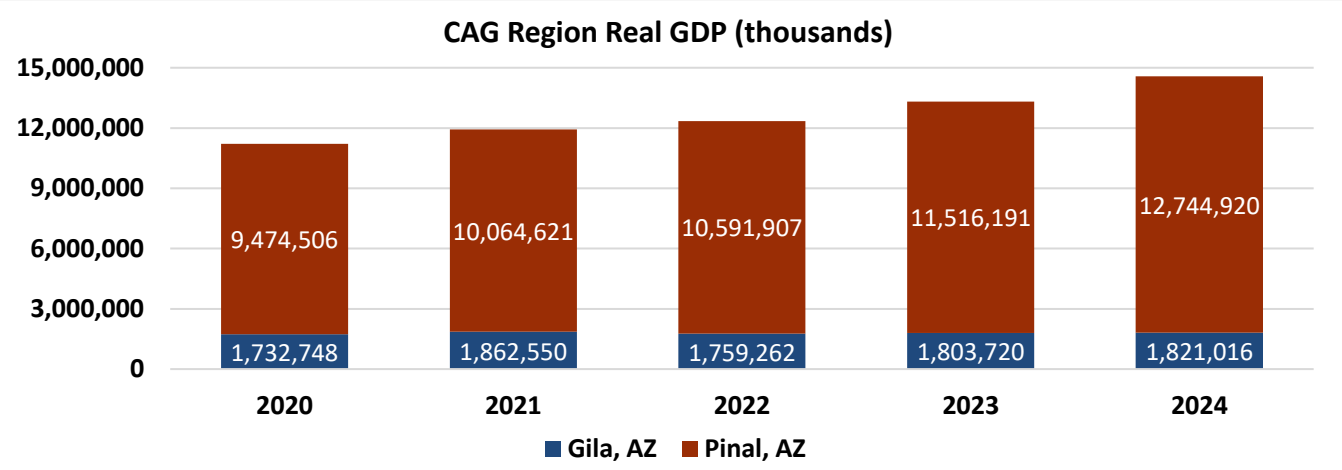
Figure A.3: Real GDP Growth, 2020-2024



Source: U.S. Bureau of Economic Analysis. GDP is measured in chained 2017 dollars.

Economic growth has been concentrated in Pinal County. Pinal County real GDP increased approximately 34.5 percent between 2020 and 2024, compared with 5.1 percent in Gila County. More recently, regional real GDP increased 9.4 percent between 2023 and 2024, with Pinal County up 10.7 percent and Gila County up 1.0 percent. The data show the strength of the regional economy while also highlighting differing economic conditions between the two counties.

Figure A.4: CAG Region Real GDP, 2020-2024



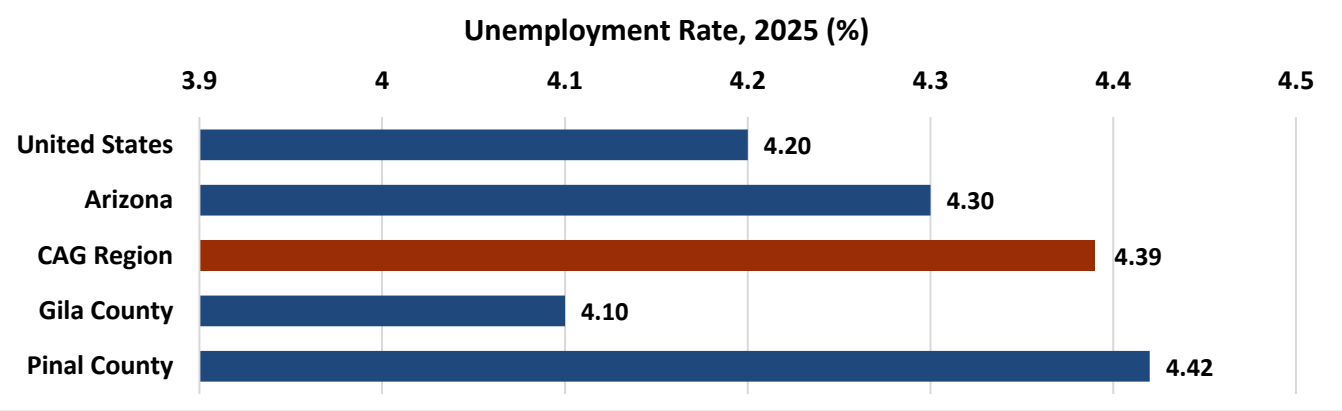
Source: U.S. Bureau of Economic Analysis. Values are in thousands of chained 2017 dollars.

EMPLOYMENT AND LABOR FORCE

The CAG region supported approximately 95,475 nonfarm jobs in 2025. Approximately 72.1 percent of regional employment was in the private sector, while 27.9 percent was in government. Goods-producing industries accounted for approximately 17.5 percent of regional employment, compared with 13.3 percent statewide. The size of the goods-producing employment base reflects the continuing importance of industries such as manufacturing, mining, and construction to the regional economy.

The civilian labor force totaled approximately 251,733 workers in 2025, including 229,122 in Pinal County and 22,611 in Gila County. The CAG regional unemployment rate was about 4.4 percent, like Arizona (4.3 percent) and the United States (4.2 percent).

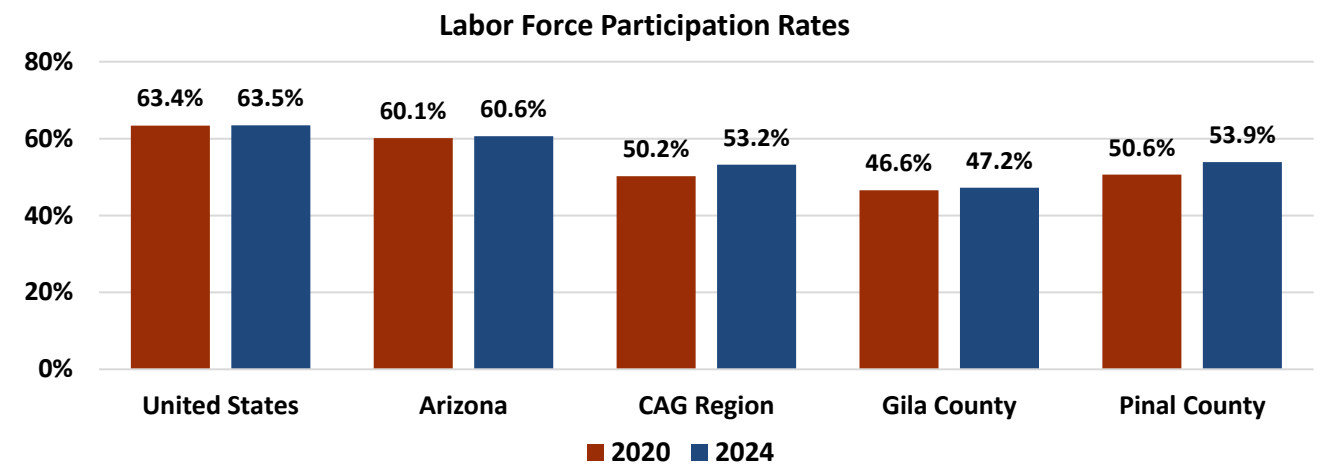
Figure A.5: Unemployment Rate, 2025



Sources: Arizona Office of Economic Opportunity and U.S. Bureau of Labor Statistics.

Another major workforce issue is labor force participation. From 2020 to 2024, about 53.2 percent of the CAG population age 16 and older participated in the labor force, compared with 60.6 percent statewide and 63.5 percent nationally. Regional participation nevertheless improved from 50.2 percent in the previous ACS period. Pinal County's rate rose from 50.6 percent to 53.9 percent, while Gila County's rose from 46.6 percent to 47.2 percent. The combination of a growing labor force and comparatively low participation shows both an economic asset and an opportunity to increase labor force participation.

Figure A.6: Labor Force Participation Rates



Source: U.S. Census Bureau, American Community Survey 5-year estimates. Current estimates represent 2020-2024; prior estimates represent 2016-2020.

K–12 EDUCATION: THIRD-GRADE READING PROFICIENCY

Third grade reading proficiency is an important early indicator of students' academic progress and long-term educational readiness. In 2025, 36 percent of Arizona third-grade students tested in English Language Arts (ELA) scored Proficient or Highly Proficient. Within the CAG region, proficiency was lower: 24 percent of third-grade students in Gila County and 27 percent in Pinal County met or exceeded the proficiency standard. Based on the number of students tested in the two counties, the estimated CAG regional proficiency rate was approximately 27 percent. These results indicate an opportunity to strengthen early literacy outcomes as part of the region's longer-term efforts to build a prepared education and workforce pipeline.

Table A.1: Third-Grade English Language Arts Proficiency, 2025

Geography	Number Tested	Third-Grade ELA Proficiency
Arizona	79,058	36%
CAG Region	4,853	26.7%
Gila County	532	24%
Pinal County	4,321	27%

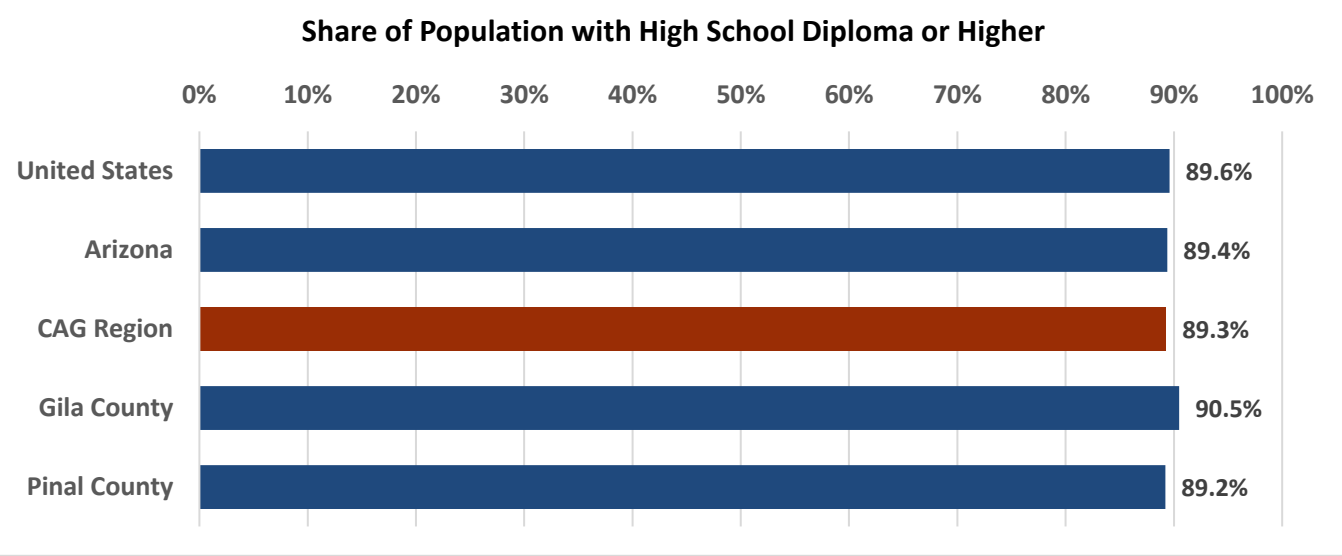
Source: Arizona Department of Education, 2025 Statewide Assessment Results.

Note: Third-grade ELA proficiency is the percentage of Grade 3 students who scored Proficient or Highly Proficient on the statewide English Language Arts assessment. The CAG regional rate is an estimated weighted rate based on the number of students tested in Gila and Pinal counties. Because the source data report county proficiency percentages as rounded whole numbers, the regional estimate is approximate.

EDUCATIONAL ATTAINMENT

High school educational attainment in the CAG region is comparable with state and national levels. Approximately 89.3 percent of CAG residents age 25 and older have a high school diploma or higher, compared with 89.4 percent statewide and 89.6 percent nationally. Gila County's rate is approximately 90.5 percent, and Pinal County's rate is 89.2 percent.

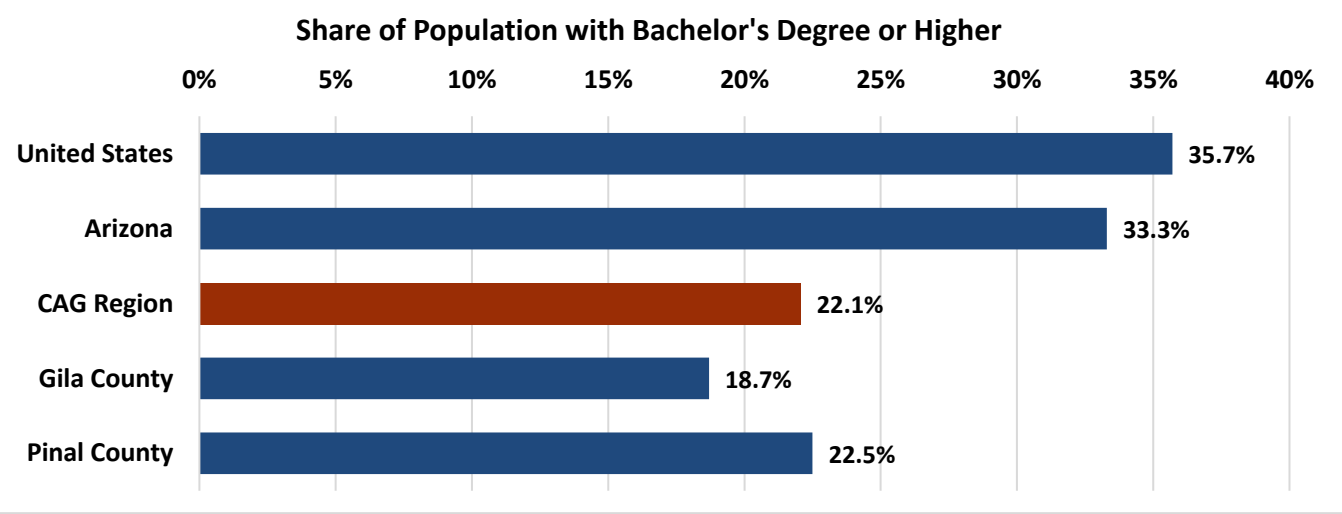
Figure A.7: Population Age 25 and Older with a High School Diploma or Higher



Source: U.S. Census Bureau, 2020-2024 American Community Survey 5-year estimates.

The gap is larger for bachelor's degree attainment. About 22.1 percent of CAG residents age 25 and older hold a bachelor's degree or higher, below Arizona's 33.3 percent and the national rate of 35.7 percent. Bachelor's degree attainment is approximately 18.7 percent in Gila County and 22.5 percent in Pinal County. These differences reinforce the importance of workforce development, career and technical education, post-secondary training, talent retention, and aligning education with employer needs.

Figure A.8: Population Age 25 and Older with a Bachelor's Degree or Higher

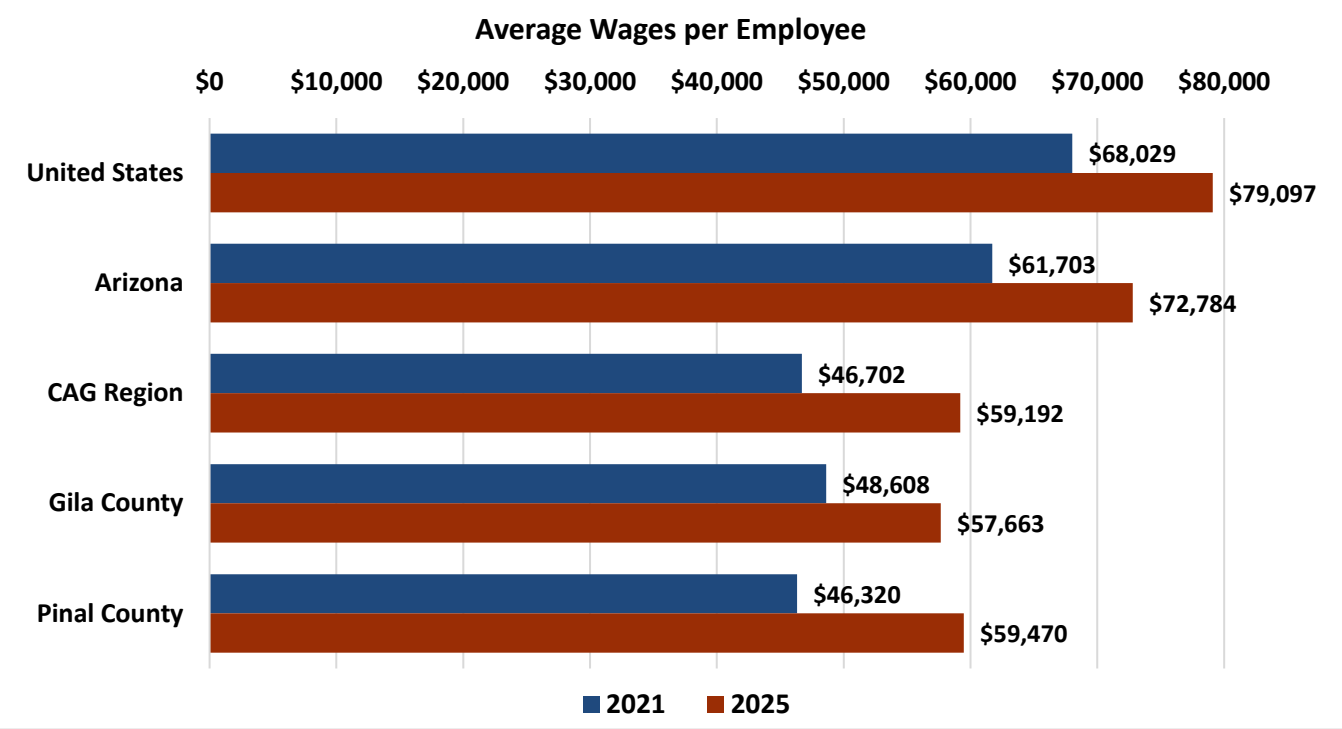


Source: U.S. Census Bureau, 2020-2024 American Community Survey 5-year estimates.

WAGES AND PERSONAL INCOME

Wages have increased throughout the CAG region, although average wage levels remain below state and national averages. Average annual wages per employee rose from about $46,700 in 2021 to $59,192 in 2025, a nominal increase of about 26.7 percent. Average wages were approximately $57,663 in Gila County and $59,470 in Pinal County, compared with $72,784 statewide and $79,097 nationally.

Figure A.9: Average Annual Wages per Employee, 2021 and 2025

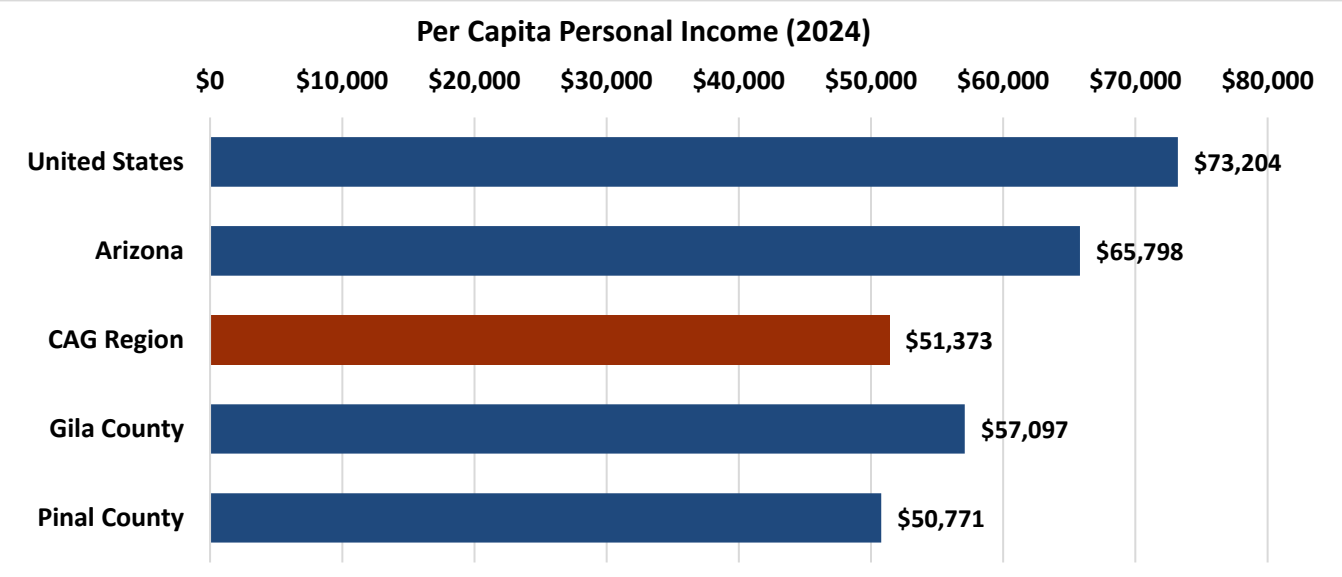


Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

Per capita personal income shows a similar regional gap. This analysis uses Per Capita Personal Income (PCPI) from the Bureau of Economic Analysis (BEA). PCPI is a stronger benchmark for regional economic vitality because it more comprehensively measures the total financial resources available to residents than traditional census metrics. Unlike standard per capita income, which counts only direct cash wages, PCPI captures the full spectrum of economic inflows, including employer-sponsored benefits, investments, and government safety-net transfers such as Social Security and Medicare. Given these regions' distinct economic profiles, such as Pinal County's rapid suburban and industrial expansion and Gila County's older demographic footprint, incorporating non-cash benefits and retirement distributions is essential to accurately capture and compare true purchasing power and standard of living across the study areas.

CAG regional PCPI was approximately $51,373 in 2024, compared with $65,798 statewide and $73,204 nationally. Gila County's PCPI was approximately $57,097, while Pinal County's was approximately $50,771. Regional PCPI increased approximately 23.7 percent in nominal terms between 2020 and 2024. Increasing access to higher-wage employment and opportunities for residents to build income remain important components of long-term regional prosperity.

Figure A.10: Per Capita Personal Income, 2024

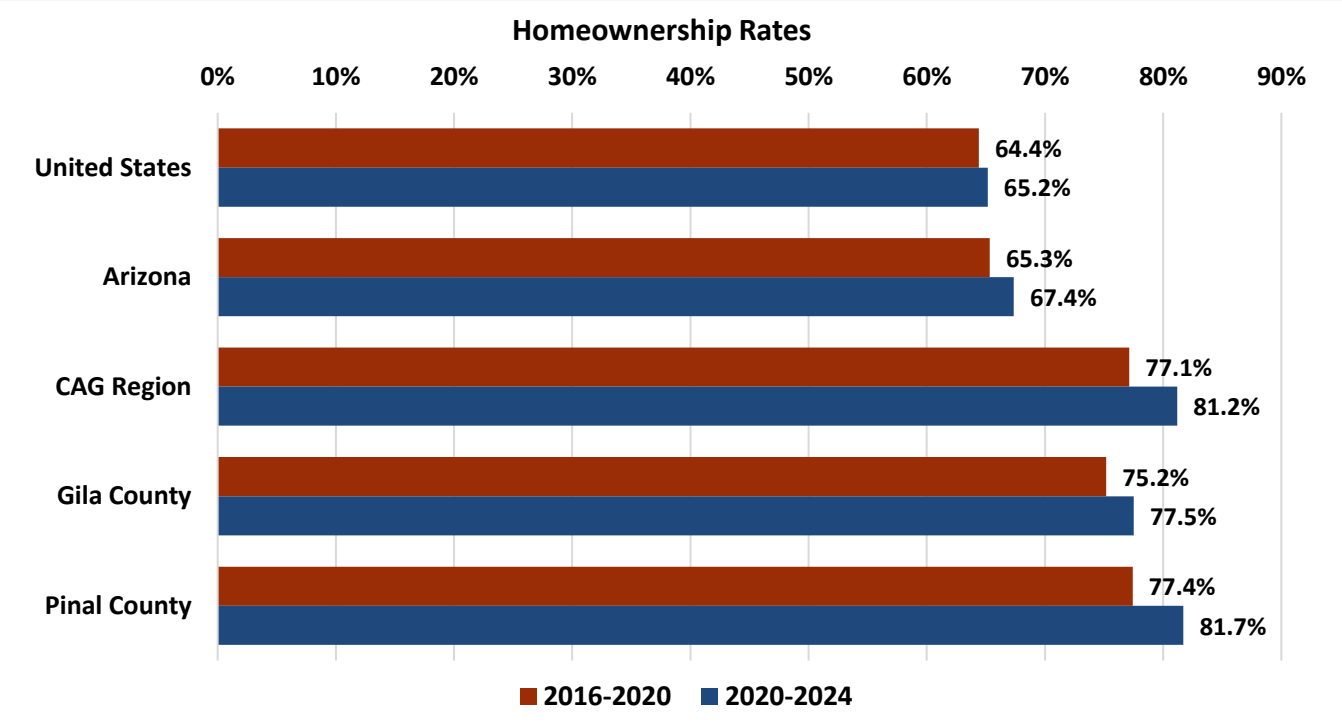


Source: U.S. Bureau of Economic Analysis.

HOUSING AND LIVABILITY

Housing conditions vary significantly across the CAG region. Homeownership is comparatively high: approximately 81.2 percent of occupied housing units in the CAG region are owner-occupied, compared with 67.4 percent statewide and 65.2 percent nationally. Homeownership is approximately 77.5 percent in Gila County and 81.7 percent in Pinal County.

Figure A.11: Homeownership Rates

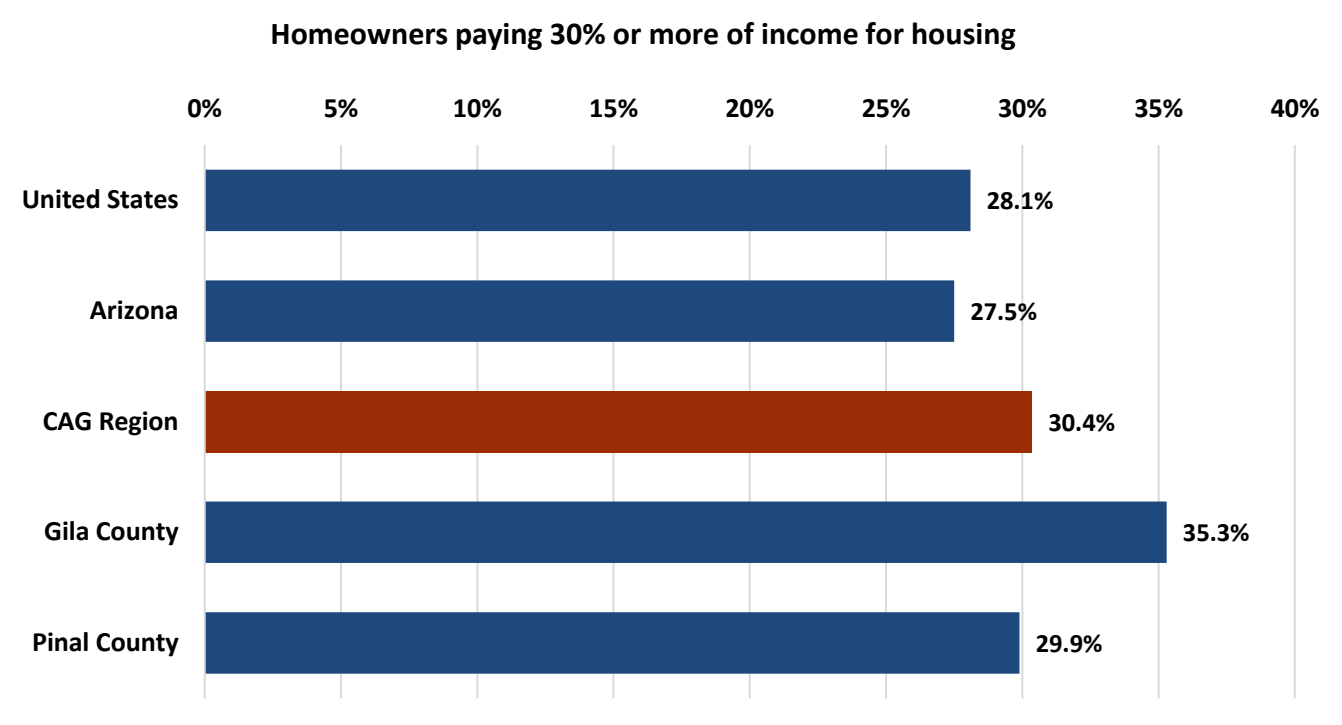


Source: U.S. Census Bureau, American Community Survey 5-year estimates.

Median owner-occupied home values remain below the Arizona median. The median value was approximately $269,400 in Gila County and $349,000 in Pinal County, compared with $394,500 statewide. However, lower home values do not necessarily mean that housing is affordable for all households.

Approximately 30.4 percent of CAG homeowners with a mortgage spend 30 percent or more of household income on housing costs, compared with 27.5 percent statewide and 28.1 percent nationally. The burden is especially high in Gila County, where about 35.3 percent of mortgaged homeowners are cost-burdened. Pinal County's share is similarly high at 29.9 percent.

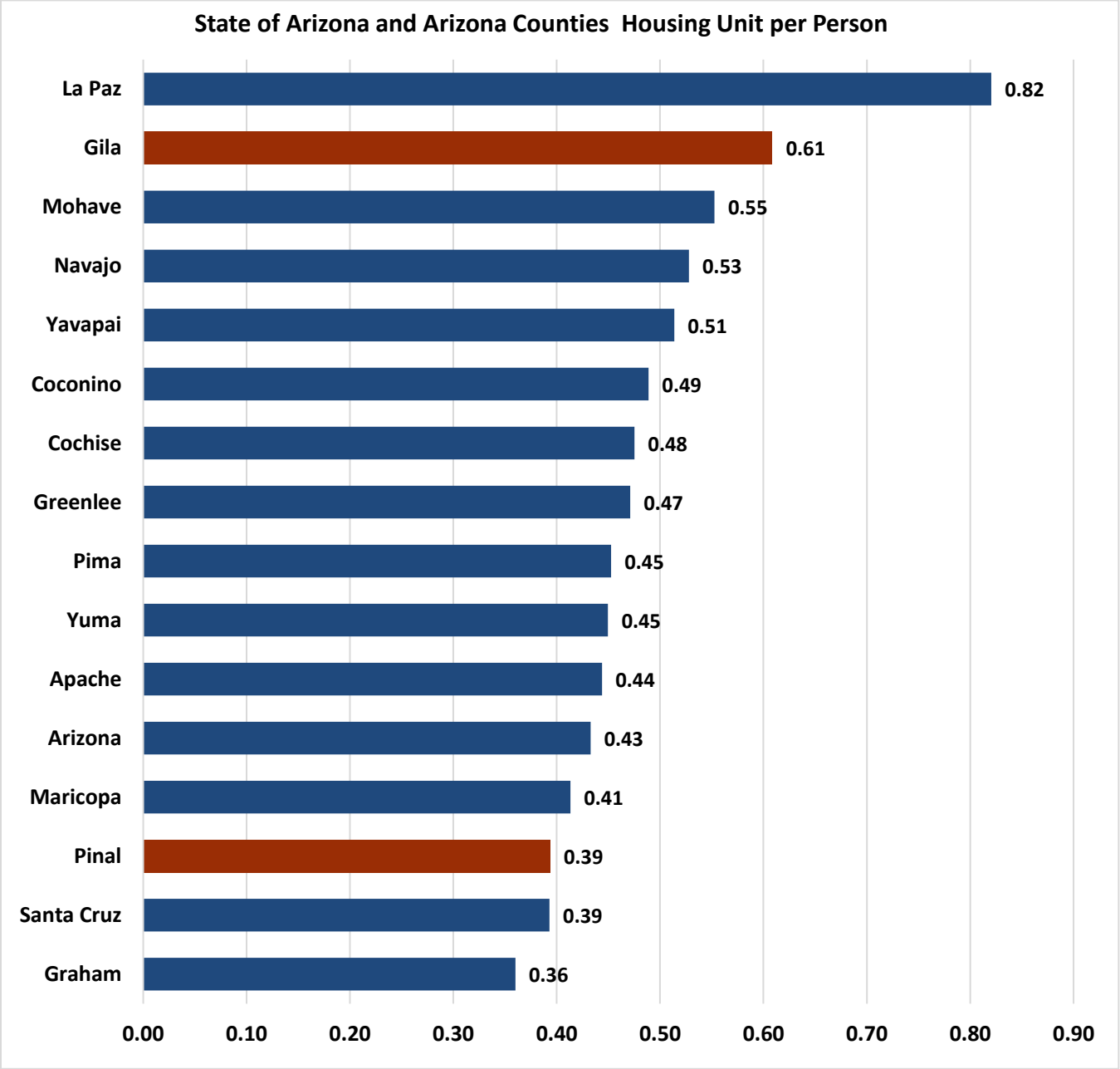
Figure A.12: Homeowners Paying 30 Percent or More of Income for Housing



Source: U.S. Census Bureau, 2020-2024 American Community Survey 5-year estimates. Includes owner-occupied housing units with a mortgage.

Pinal County also faces housing-supply pressure associated with rapid population growth. The county has approximately 0.394 housing units per resident, among the lowest ratios in Arizona. Housing units per resident do not directly measure vacancies or affordability, but they indicate the relative size of the housing stock compared with population. Taken together, these measures indicate two different housing challenges within the region: rapid-growth-related housing supply pressure in Pinal County and comparatively high housing cost burdens in Gila County.

Figure A.13: State of Arizona and Arizona Counties Housing Units per Person



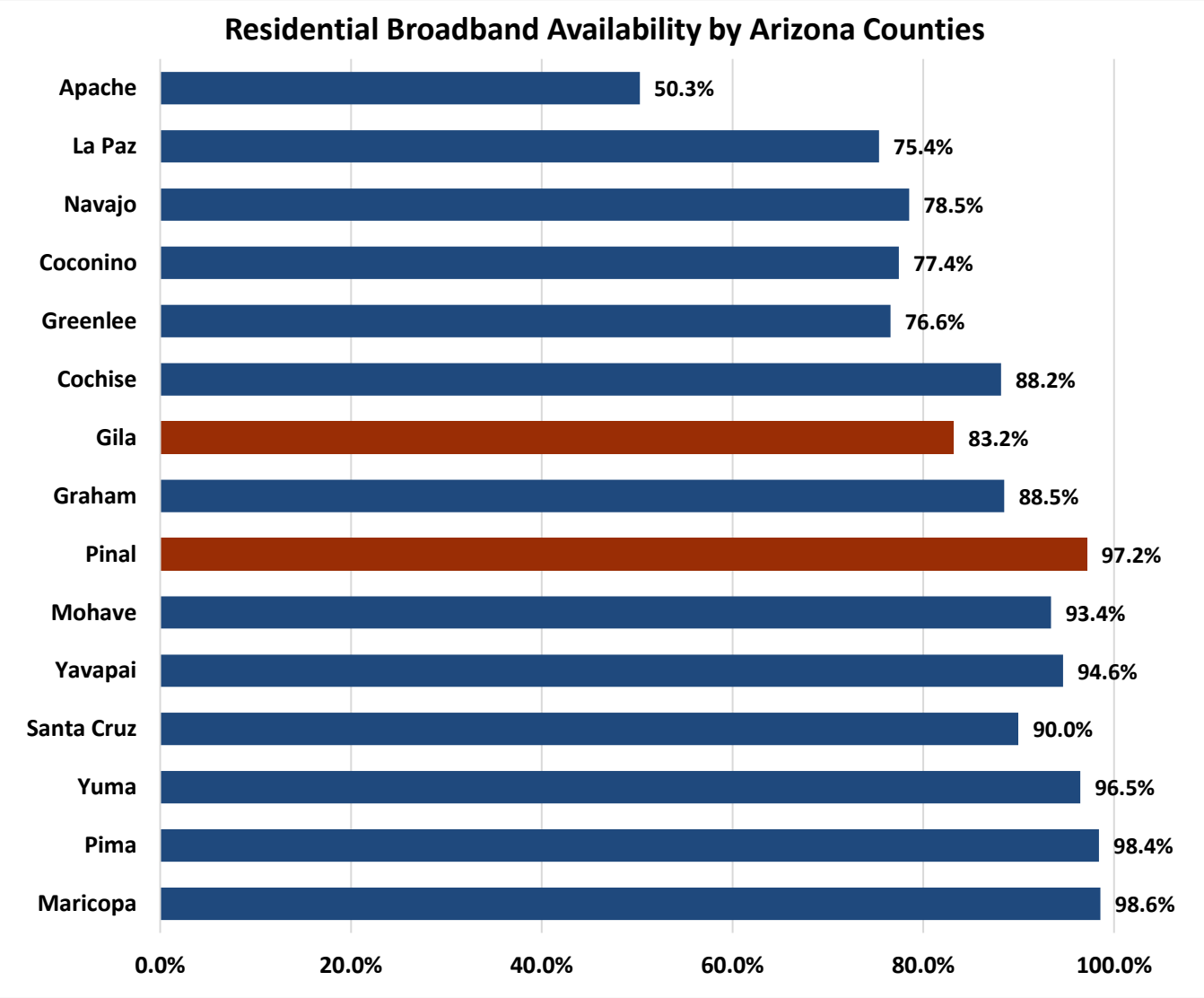
Source: U.S. Census Bureau, 2020-2024 American Community Survey 5-year estimates.

BROADBAND INFRASTRUCTURE

Broadband availability has improved as an economic development asset throughout much of the region, although significant geographic differences remain. As of December 31, 2025, approximately 97.2 percent of residential broadband-serviceable locations in Pinal County had terrestrial fixed broadband service with advertised speeds of at least 100/20 Mbps. Pinal County's availability is among the highest in Arizona and is comparable to the state's major metropolitan counties.

In Gila County, approximately 83.2 percent of residential broadband-serviceable locations had terrestrial fixed broadband available at 100/20 Mbps or faster. While broadband is available to a substantial majority of locations, the difference between Gila and Pinal illustrates the ongoing infrastructure challenge of delivering high-speed service throughout rural and geographically difficult areas of the CAG region.

Figure A.14: Residential Fixed Broadband Availability at 100/20 Mbps by Arizona County



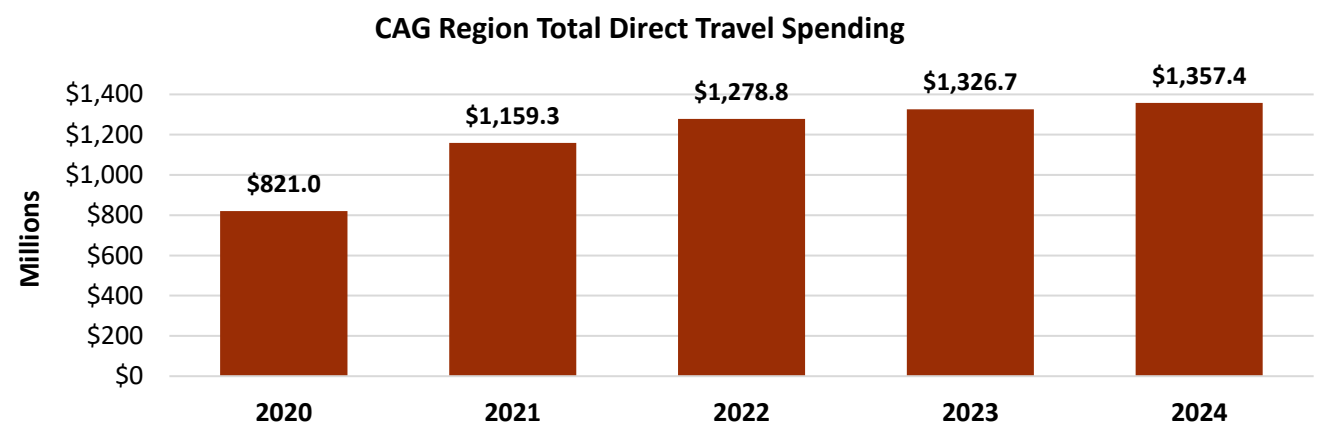
Source: Federal Communications Commission, Broadband Data Collection, December 31, 2025. Percent represents residential broadband-serviceable locations with terrestrial fixed service available at advertised speeds of at least 100/20 Mbps.

Current FCC Broadband Data Collection estimates measure advertised broadband availability at broadband-serviceable locations. Because the FCC methodology and service threshold differ from the methodology used for broadband figures included in the previous CEDS, current and prior percentages should not be interpreted as a direct time-series comparison.

TOURISM AND VISITOR ECONOMY

Tourism remains an important source of economic activity and diversification for the CAG region. Direct travel spending increased from about $821.0 million in 2020 to $1.36 billion in 2024, a 65.3 percent increase. In 2024, direct travel spending totaled approximately $981.6 million in Pinal County and $375.8 million in Gila County.

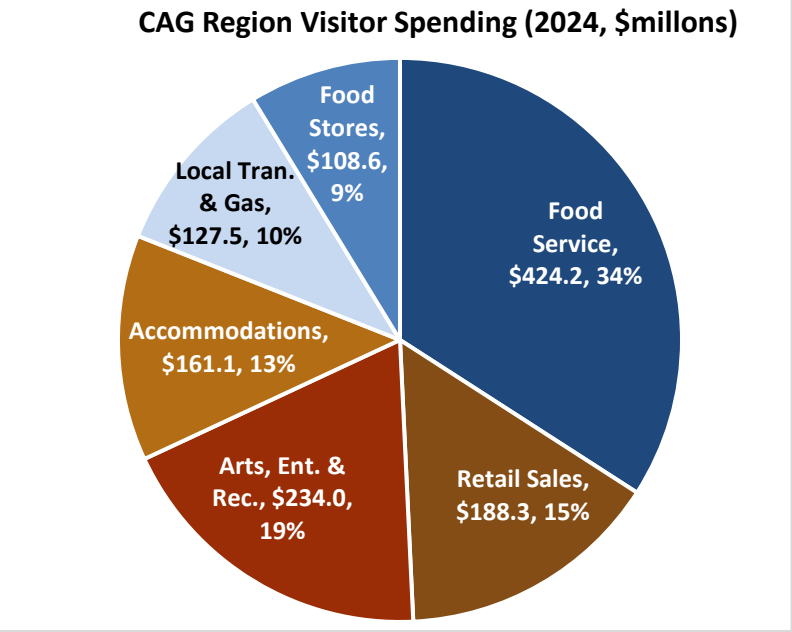
Figure A.15: CAG Region Total Direct Travel Spending, 2020-2024



Source: Dean Runyan Associates. Values are in millions of dollars.

Visitor spending supports regional businesses. In 2024, major visitor spending categories included about $424.2 million in food service, $234.0 million in arts, entertainment and recreation, $188.3 million in retail sales, $161.1 million in accommodations, $127.5 million in local transportation and gasoline, and $108.6 million in food stores. These expenditures show tourism's connections to small businesses, recreation, hospitality, retail, and the community's quality of place throughout the CAG region.

Figure A.16: CAG Region Visitor Spending by Category, 2024



Source: Dean Runyan Associates. Values are in millions of dollars.

APPENDIX B. Tribal Community Profiles

The CAG region includes four sovereign tribal nations: the Ak-Chin Indian Community, Gila River Indian Community, San Carlos Apache Tribe, and White Mountain Apache Tribe. The following indicators provide context on selected demographic, workforce, education, income, housing, and infrastructure conditions within the corresponding census-defined tribal geographies. Arizona data is included as a statewide reference to contextualize differences across tribal communities.

Table B.1: Key Social and Economic Indicators for the Four Tribal Communities[1]

Indicator	Ak-Chin Indian Community[2]	Gila River Indian Community[2]	San Carlos Apache Tribe[2]	White Mountain Apache Tribe[2]	Arizona
Population estimate	1,339	13,900	10,551	15,117	—
Persons per household	4.2	4.4	3.8	3.6	2.53
Median household income	$50,500	$39,797	$45,221	$41,616	$79,964
Per capita income[3]	$19,623	$15,701	$15,678	$15,435	$42,503
Persons below poverty level	29.0%	36.0%	43.8%	41.0%	11.7%
High school graduate or higher, age 25+	77.2%	76.4%	79.7%	74.1%	89.4%
Bachelor's degree or higher, age 25+	8.4%	6.8%	3.9%	7.6%	33.3%
Overcrowding rate[4]	17%	13%	20%	14%	4%
Mean travel time to work	17.6 min.	24.2 min.	26.2 min.	24.8 min.	25.4 min.
Unemployment rate[5]	10.1%	9.9%	22.4%	9.6%	5.1%
Labor force participation	56.0%	43.6%	51.0%	43.5%	60.6%
Percent of households with a broadband Internet subscription	64.1%	71.3%	71.2%	50.2%	91.5%

Source: U.S. Census Bureau, 2020–2024 American Community Survey 5-Year Estimates.

Note: 1. Tribal-area statistics represent residents within Census-defined American Indian reservation and off-reservation trust land geographies and should not be interpreted as tribal enrollment counts. ACS estimates are sample-based, and margins of error can be substantial for smaller populations, particularly the Ak-Chin geography.
2. Census geographies for the four tribal communities are: Maricopa (Ak-Chin Indian Community) Indian Reservation and Off-Reservation Trust Land, Gila River Indian Reservation, San Carlos Reservation, and Fort Apache Reservation, respectively.
3. Tribal and state metrics are derived from the ACS data, which is the primary federal source tracking economic data for reservations. The Per Capita Income (PCI) indicator is a survey-based metric that measures pre-tax cash income (wages, self-employment, and Social Security) and excludes non-cash benefits. Consequently, the Arizona state benchmark presented here is lower than the state PCPI data used in Figure 10. PCPI data is sourced from the Bureau of Economic Analysis (BEA) and includes comprehensive non-cash benefits. No PCPI data is available for the tribes; therefore, using ACS metrics for both the tribes and the state ensures a statistically consistent, apples-to-apples comparison.
4. Overcrowding is defined as more than one person per room, based on U.S. Department of Housing and Urban Development (HUD) convention. “Room” means rooms suitable for living purposes, not bedrooms.
5. Labor market statistics reported elsewhere in the CEDS use more current 2025 estimates from the Arizona Office of Economic Opportunity's Local Area Unemployment Statistics (LAUS) program where available. Comparable LAUS data are not published for the census-defined tribal geographies used in this appendix. Therefore, the tribal community profiles use the 2020–2024 American Community Survey (ACS) 5-Year Estimates, the most recent ACS 5-year data available for all four tribal geographies at the time of analysis. The tribal comparison table also uses the 2020–2024 ACS 5-Year Estimates for Arizona to keep the data source, reference period, and methodology consistent across all geographies. As a result, Arizona values in this table may differ from more recent 2025 figures reported elsewhere in the CEDS.



CAG
Central Arizona Governments
One Region • No Boundaries

2540 W. Apache Trail Suite 108; Apache Junction, AZ 85120

Phone: (480) 474 – 9300 | Fax: (480) 474 – 9306

www.cagaz.org