



Comprehensive Development Strategy (CEDS)

2026-2031

DRAFT PLAN #2

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Arizona Town Hall Collaborative

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 resilience, 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 is designed to align with and enhance ongoing economic development efforts and support broader regional, state, and local plans.

The CEDS resulted from meaningful engagement with community leaders and stakeholders from throughout the region. The update process utilized existing working groups in the two counties to solicit public and private input. The CEDS Committee membership represents the region and met several times to develop strategies to address regional issues. Ultimately, the CAG CEDS will be adopted by the Regional Council before being submitted to the EDA for approval.

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 District board.

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

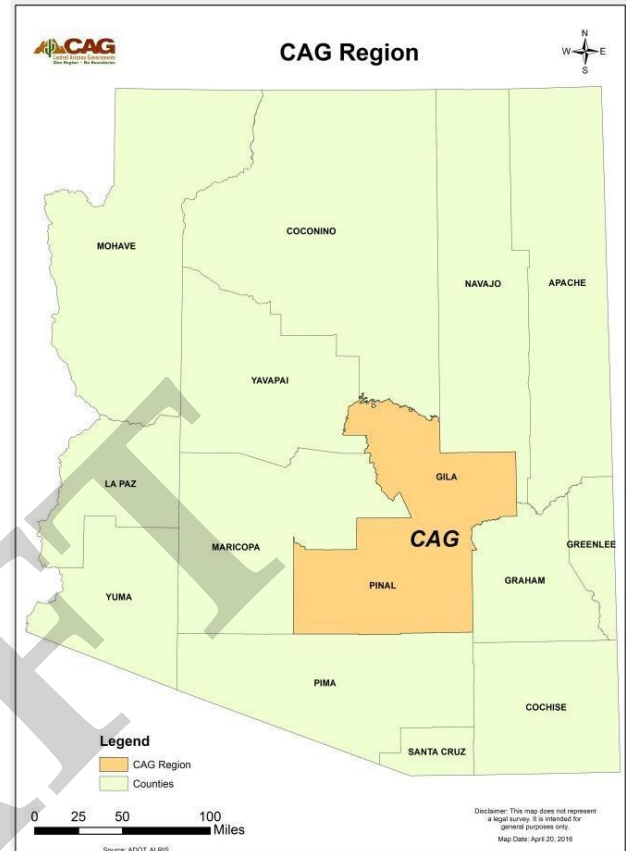
Historic and projected development throughout the region indicates a very promising future but also underscores some fundamental challenges. For decades, the region has had abundant developable land, particularly in Pinal County; relatively affordable housing; and excellent quality-of-life attributes 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.

The CAG region includes two very different counties (Pinal and Gila), 18 distinct incorporated governments, and four sovereign Native American communities. Gila County covers 4,758 square miles, and Pinal County covers 5,366.7 square miles (excluding water bodies). The EDD land area is 10,124.7 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, and Superior.
- **Native American Communities:** Ak-Chin, 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 are also a key factor in the region's development. Only 15 percent of the land in the region is privately owned; the other 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 for communities within 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,



variations in soil types limit physical development in large portions of the region. In general, the western portions of the CAG region have more developable soils.



Gila County: Gila County covers approximately 4,769 square miles in east-central Arizona. The county's 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. Gila County is primarily 96-98 percent publicly held land or under tribal sovereign jurisdiction, with only 2-4 percent 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 based on its characteristics. The southern Gila County region, 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, which comprises portions of the San Carlos and Fort Apache Indian Reservation, contains the San Carlos Apache Gold Casino and Globe-San Carlos Airport. The central Gila County region, which includes Tonto Basin, has seen solid growth anchored by its easy access and proximity to the Phoenix metropolitan area, the availability of private land, and proximity to Lake Roosevelt. The northeastern portion, which contains the community of Young, is surrounded by public lands and is very rural. The northern Gila County region, which includes Payson, Pine, and Strawberry, has seen a surge in population as local economies have shifted from mining and timber to tourism, attracting visitors for second-home development and recreational activities. 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, covering 5,386 square miles and including incorporated municipalities, four Native American communities, and unincorporated areas. Pinal County continues to experience a fast-growing economy. While Gila County's population has remained relatively stable, adding approximately 605 residents since 2020 (an increase of 1.1 percent), Pinal County has added over 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 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.

Growth within Pinal County has been particularly strong in several communities, including Coolidge (+50.0 percent), Maricopa (+33.4 percent), Casa Grande (+28.7 percent), Eloy (+24.7 percent), and Apache Junction (+16.6 percent) between 2020 and 2025.

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 federally funded project will build 32 radio towers across the county, providing 5G wireless internet to rural communities. The improvement 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 Indian Reservation, 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 casino operations 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. 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, \$4.5 million for Gila River, \$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's project is designed to connect 255 previously unserved Native American households and includes 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.

WHAT SETS THE CAG REGION APART

Strategic Location and Transportation Connectivity: The region sits between two major urban counties (Maricopa and Pima) with strong, growing economies and workforces. It sits along major transportation corridors, providing a day's drive to major West Coast markets and connectivity within three hours of international ports of entry to Mexico. 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 connecting the state's two largest metropolitan areas and complementing travel on I-10, the interstate highway linking the two regions. The passenger rail corridor is not currently funded for implementation. Historically, passenger services have existed, but currently no passenger rail service 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. UP 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 represent 19 percent, and a lot of the land is ideally located for development.

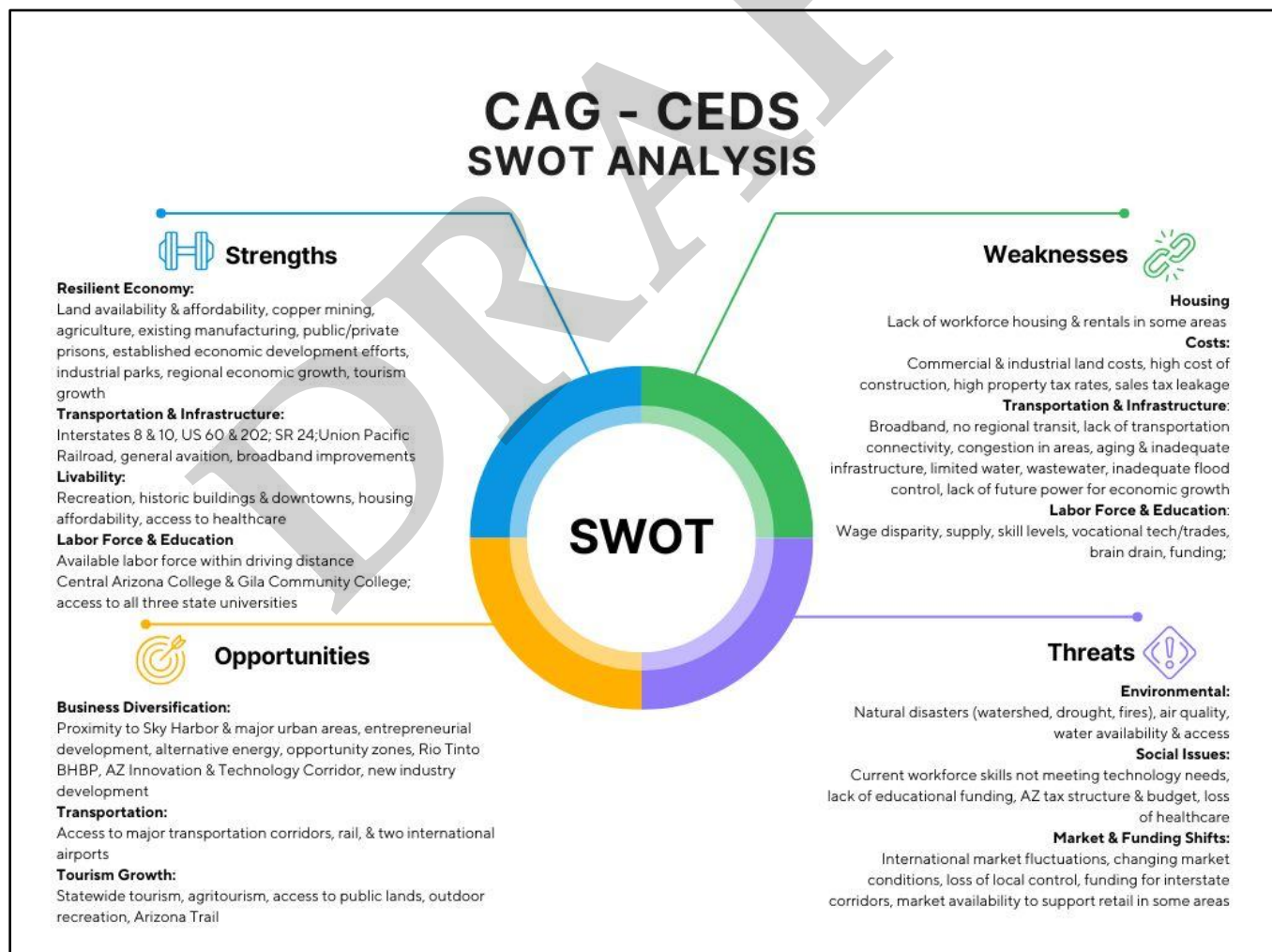
Business-Friendly Environment: Pinal County and the cities within the Sun Corridor have a proactive approach to economic growth that has drawn capital investment, major business development, and job creation. Gila County communities have also been very active in coordinated economic development, resulting in business diversification and tourism attraction. The region has a positive business image with communities providing streamlined permitting and targeted incentives to support business growth. The region has 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

A comprehensive understanding of the regional economic position is essential for 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 it is also a weakness in some geographic areas. Opportunities and threats are typically considered external characteristics that the region must recognize and position itself to respond. Opportunities are elements in the external environment that the region can exploit to its advantage. Threats are external elements that can 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.



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 provide economic impact and opportunities. Almost all of the region's population growth (+63,000 residents since 2020) and economic growth (+30% GDP, 2020-2024) have occurred in Pinal County, while Gila County is 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 gross domestic product (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 become somewhat more private-sector and goods-producing oriented. In 2025, the CAG region supported approximately 95,475 nonfarm jobs. Private-sector employment represented 72.1 percent of regional jobs, and goods-producing industries represented 17.5 percent. In the previous CEDS, private employment represented 69.3 percent, goods-producing employment represented 14.2 percent, and government accounted for 30.7 percent of regional employment. Government's share is approximately 27.9 percent in 2025. These changes indicate expansion of the region's 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 an economic transformation. In the past five years, the region has seen key manufacturing companies such as Kohler and Procter & Gamble establish major operations. 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, Union Pacific Rail, 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 resilience and diversification. Tourism has moved from recovery to expansion since the last 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 and connecting the region to significant markets. As a result, much of the region is within a one-day truck haul of major markets and international ports. Regional general aviation, 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, Union Pacific Railroad (UPRR), provides coast-to-coast movement of various commodities. In addition, the region has Copper Basin Railroad and Magma Railroad providing short line services.

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 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, demonstrating that broadband is both a regional infrastructure strength and a continuing 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, and it is considered affordable.

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, while housing cost burdens remain challenges discussed below.

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. Central Arizona College and Gila Community College provide post-secondary degrees and certificates and can train local talent. Access to the three state universities is also an asset.

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.

¹ Current 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.

Weaknesses

Housing: In a January 2022 Statewide Needs Assessment by the University of Arizona Cooperative Extension, 62 percent of Pinal and 61 percent of Gila respondents said affordable housing was important, and 59 percent of Pinal and 44 percent of Gila respondents rated safe and healthy homes as extremely important. However, growth is intensifying housing availability and household cost burdens. In that same study, when asked about top priorities, 91 percent of Pinal County respondents rated affordable housing as extremely or very important. Gila County did not identify this issue as a priority. 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.

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 and the lowest among the selected peer counties used in the CEDS comparison. 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 principal challenge includes accommodating rapid growth and housing demand, while Gila County faces significant affordability and workforce-housing challenges despite a substantially slower rate of population growth.

Costs: As Pinal County continues to grow quickly, development costs are rising, including land prices and infrastructure development. 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 loss of infrastructure, businesses, and lives. Regional transportation planning is also critical in both counties. The Pinal Regional Transportation Authority 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 authority 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 future of the PRTA and regional plan is 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 construct effective transportation network improvements.

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. APS and SRP, which serve the region, predict that they will need to double, if not triple, their power system over the next decade. As these companies work to solve the overall system needs, solar, batteries, and natural gas offer energy opportunities to explore. However, the new Transwestern Pipeline (natural gas) is not expected to increase capacity until the end of 2029, and new nuclear isn't expected until after 2040. Additionally, electrical providers include Electrical District 3, Electrical District 4, Trico, and 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. Over 90 percent of respondents in the 2022 Statewide Needs Assessment mentioned educational issues (quality K-12 education, recruitment and retention of qualified teachers, and improving graduation rates) as extremely or very important to address in both counties.

Although participation has improved, labor force participation remains a significant constraint. During the 2020-2024 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.

The larger educational gap occurs in postsecondary 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 approximately 18.7 percent in Gila County and 22.5 percent in Pinal County.

Wage levels also indicate the 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 both to expand the talent pipeline and to attract and grow higher-wage employment opportunities.

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 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 Gila County business and industry needs. Pre-K – 12 institutions throughout the region are also integrating career

awareness and career exploration programs to start talent development with younger students. Central Arizona Vocational Institute of Technology (CAVIT) and Cobre Valley Institute of Technology (CVIT), in Gila County, provide increasing training and certification for skills training in high school.

Opportunities

Business Diversification: Arizona's continually expanding, diversified economy focused on advancing technology- and export-based industries has a ripple effect through 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, work with existing companies to expand their businesses in Arizona, 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, ensures the region's assets are considered and opportunities identified. Traditional industries like agriculture and mining continue to play a significant role, but industry diversification has begun to have a major economic impact.

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. Pinal County alone had approximately 7,100 manufacturing jobs and 6,800 mining and construction jobs in 2025. 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 study completed by Pinal County estimated retail leakage of over \$1 billion into Maricopa County (within a seven-mile radius of San Tan Valley Wal-Mart). 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 Pinal County.

Transportation: The CAG region has developed along transportation corridors, with Interstate 8, 10, and US 60 serving the region's major population centers. Additional highways, such as US 87 and State Routes 77, 188, and 287 connect much 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, 1-10 widening from SR202 to SR

Arizona Target Sectors

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

Aerospace & Defense

Manufacturing

Bioscience, Medtech, & Healthcare

Business & Financial Services

Film & Digital Media

Technology & Innovation

387, improvements to SR 347, SR 24, and SR 260, rail improvements, and major interchange and roadway projects.

TRANSPORTATION SECTION TO BE REVISED

Tourism Growth: Statewide tourism is a cornerstone of Arizona’s economy, serving as the number one 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 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), accommodations (\$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, according to the University of Arizona’s Cooperative Extension report, Visitors to state parks boost the Arizona economy with a \$555 million economic contribution. 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. Loss of life and property is tremendous and takes years to recover from. The San Tan Valley area experienced significant flooding in 1983, 1993, and 2007. Ensuring the region can respond quickly and rebuild effectively is critical. The Coolidge Dam poses a unique threat to Pinal County and downstream communities. **NOTE: NOT CERTAIN WHAT TO SAY ABOUT THIS COMMENT FROM SAN TAN VALLEY. THERE ARE PROBABLY OTHER AREAS OF PINAL COUNTY THAT FLOODED IN THOSE YEARS**

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 the use of surface water and groundwater, which are legally distinct though physically interconnected. Availability and access to clean, abundant water is 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 of the arid environment and human activities, including construction and open burning, contribute to elevated PM10 levels. The air quality is closely monitored and will play a role in future economic development efforts.

Social Issues: A reduction in education and employee training funding to ensure the region's workforce skills can meet employer technology needs 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 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. The strategies outline how the region will respond to changing state, national, and global trends, as well as ensure the region can respond to environmental and industry impacts. Success requires a collaborative approach by the region’s public and private partners, using the CEDS strategic action plan to prioritize and implement projects. However, no plan can identify all potential future issues. But the plan outlines how to reprioritize and respond effectively in a coordinated way.

Regional Economic Vision: To create a thriving, forward-directed region that is connected to the Arizona, national, and global economy but rooted in its historic foundation.

CAG Mission Statement: Encourage local units of government to join and cooperate with one another to improve the health, safety, and general welfare of their citizens; 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 are focused on 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 the “guideposts” to advance the region’s economy. The graphic below illustrates the direct correlation between the identified strengths, weaknesses, opportunities, and threats identified in the CAG regional SWOT analysis 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

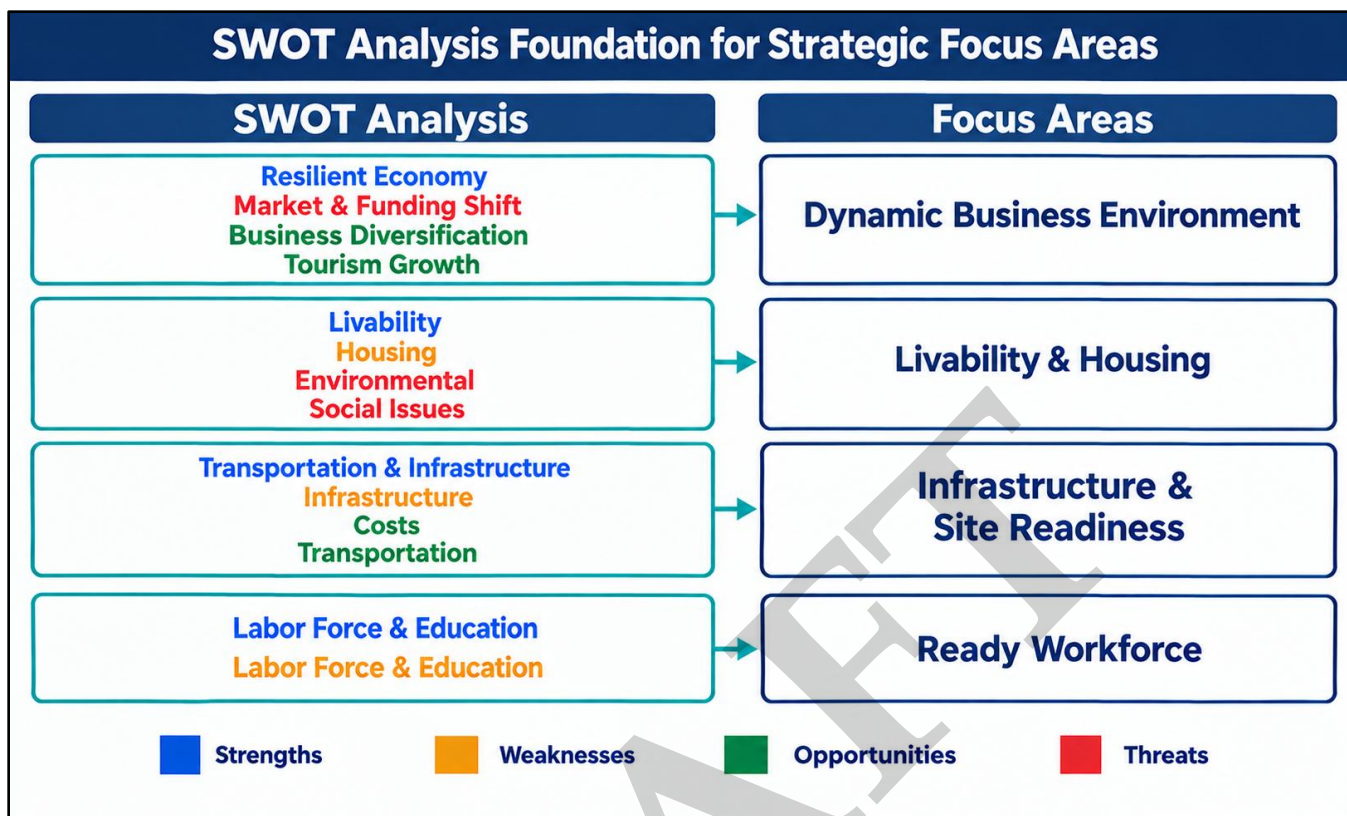
Focus Areas: The foundational structure to move the region toward its vision. Within each focus area, we identify target opportunities, timeframes, goals, and objectives. Within each focus area are:

Target Opportunities are a targeted subarea that is directly related to advancing focus area accomplishments.

Timeframes anticipate the period for substantial effort to occur related to the associated target opportunity.

Goals are the ultimate achievement for the associated target opportunity.

Objectives are specific strategies to achieve the associated goal.



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. It is working diligently to build a more diversified, resilient economy while supporting industries such as mining and agriculture, which have been the region’s historic economic foundation. Ultimately, building a dynamic business environment is focused on attracting and maintaining quality jobs. A quality job is one that 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)

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

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

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)

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

Objective: Identify and encourage spin-off and/or support industries that can use the existing workforce.

Objective: Market the region with existing business suppliers, bringing them closer to the end user to reduce transportation costs.

Objective: Facilitate regional collaborative efforts to encourage new businesses to locate and/or expand within the region.

Objective: Establish and promote the regional Opportunity Zones.

Target Opportunity: Existing Business Support and Readiness

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

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

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

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

Objective: Organize workshops to train entrepreneurs in online business.

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

Objective: Enhance, create, and 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)

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

Objective: Create a coordinated regional effort to attract visitors.

Objective: Support and encourage individual communities in their heritage preservation activities.

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

Objective: Support efforts to preserve natural views and landscapes.

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

Focus Area #2: Livability and Housing

Overall, the residents rate the region as having a strong quality of life and 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)

Goal: Assure water supply for CAG communities through collaboration and identifying new opportunities.

Objective: Ensure new developments meet standards for assured water supply.

Objective: Develop new resources to draw water into the region.

Objective: Assist and support water planning and conservation/management.

Objective: Continue to ensure that the region's water needs are considered as the state and federal governments develop water supply policies.

Objective: Work toward creating a more reusable water supply and improving wastewater capture and treatment.

Target Opportunity: Workforce Housing

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

Goal: Broaden accessible housing for workers and residents throughout the region.

Objective: Support strategies for alternative workforce housing opportunities to meet growing demand.

Objective: Identify and remove barriers to housing development.

Target Opportunity: Healthcare

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

Goal: Ensure access to quality healthcare services and facilities.

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

Objective: Decrease transportation costs associated with healthcare.

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 quantity and quality of water, wastewater, flood control, broadband, and energy are essential for growing strong, resilient communities. All of which are under pressure from growth and must be addressed to ensure future capacity.

Additionally, ensuring that people and goods can move safely within and through the region on connected comprehensive transportation networks 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 network of roadways that bring visitors to their communities, allow for business access, and the movement of goods and services.

Target Opportunity: Broadband

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

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

Objective: Provide resilient/redundant broadband networks within communities.

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

Target Opportunity: Water and Wastewater

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

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

Objective: Public and private water providers evaluate and benchmark current water and wastewater networks.

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

Objective: Communicate available capacity to prospective businesses.

Objective: Expand wastewater treatment capacity.

Objective: Expand recharge and direct water reuse.

Target Opportunity: Energy

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

Goal: Ensure that the region has energy resources to meet future demand and to take advantage of economic opportunities.

Objective: Work closely with APS, SRP, and electrical districts to plan effectively, ensure power needs keep pace with economic development, and keep Arizona competitive.

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)

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

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

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

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

Objective: Provide political input and support for plans or legislation that improves transportation options throughout the region.

Objective: Ensure coordination and collaboration among all transportation entities (e.g., federal, regional, and local transportation entities).

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

Objective: Seek funding streams to improve existing roadways.

Objective: Work with existing transportation groups to lobby for transportation projects with a strong economic impact.

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

Objective: Support the planning and development of new rail development or services.

Objective: Collaborate with public/private airports to support economic development opportunities.

Target Opportunity: Disaster Preparedness

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

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

Objective: Expand coordination and training to ensure disaster preparedness and effective response.

Objective: Coordinate flood control within CAG communities and surrounding counties.

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

Objective: Coordinate with regional flood control districts for flood mitigation

impacting businesses.

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 is vital to the region. It has the right skills to meet the demands of existing and future regional employers. Economic success requires a prepared workforce. The region has strong public workforce partners such as the Pinal County Workforce Development Board and Northeastern Arizona Local Workforce Development Board with offices in Globe and Payson. These regional organizations are affiliated with the statewide program Arizona@Work. Both regional efforts focus on implementing innovative strategies collaboratively with public and private organizations to expand the pipeline of work-ready individuals, connect the diverse workforce with high-quality, sustainable jobs, and meet current and future workforce demands.

NEED TO ADD A PARAGRAPH ABOUT THE TRAINING PROGRAMS

Target Opportunity: Workforce Development

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

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

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

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

Objective: Gather and make current workforce data available in a timely and usable manner.

Objective: Explore barriers to workforce participation such as childcare, housing, and transportation.

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.

Objective: Identify the data needs and provide local economic developers with workforce data tailored for effective business recruitment.

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

Goal: Support efforts and organizations dedicated to expanding the regional talent pipeline.

Objective: Work with educators and employers to expand career awareness and exploration for K-12, including curriculum development, career expos, teacher and student internships, career technical education, and expanded dual enrollment.

Objective: Work with Central Arizona College, Gila Community College, the three state universities, and other institutions to grow and enhance post-secondary educational opportunities to meet current and future talent needs.

Objective: Increase learning opportunities in skilled trades.

Target Opportunity: Education – **NEED TO ADD GOALS/OBJECTIVES HERE**

EVALUATION FRAMEWORK

Implementing the CAG CEDS depends on effective communication with various regional, state, and federal partners and public/private stakeholders. The CEDS serves as the regional economic development strategy that supports economic development efforts at the community and sub-regional level and aligns with statewide economic development efforts. The CAG Regional Council and Economic Development Committee (EDC) oversee and monitor CEDS implementation. They are also responsible for coordinating with and reporting regularly to the U.S. Economic Development Administration.

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 EDC, 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 Corporation, 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.
- Serve as a voice for 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

Many economic performance factors are important measures for the CAG region to evaluate whether its goals and objectives are moving accomplishments toward 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. The CAG will review and update the CAG-selected Progress Meters annually.

JOBS: Availability of jobs that align with the resident skill sets, offer advancement and sustainability, and help the economy thrive. Measurements to be tracked include:

- Job Growth
- Average Wages
- Unemployment
- Underemployment
- Labor Force Participation

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: 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 needs of current and future demand in 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 had an estimated population of 555,979 in 2025, including 502,071 residents in Pinal County and 53,908 residents in Gila County. About 90 percent of the region's population lives in Pinal County.

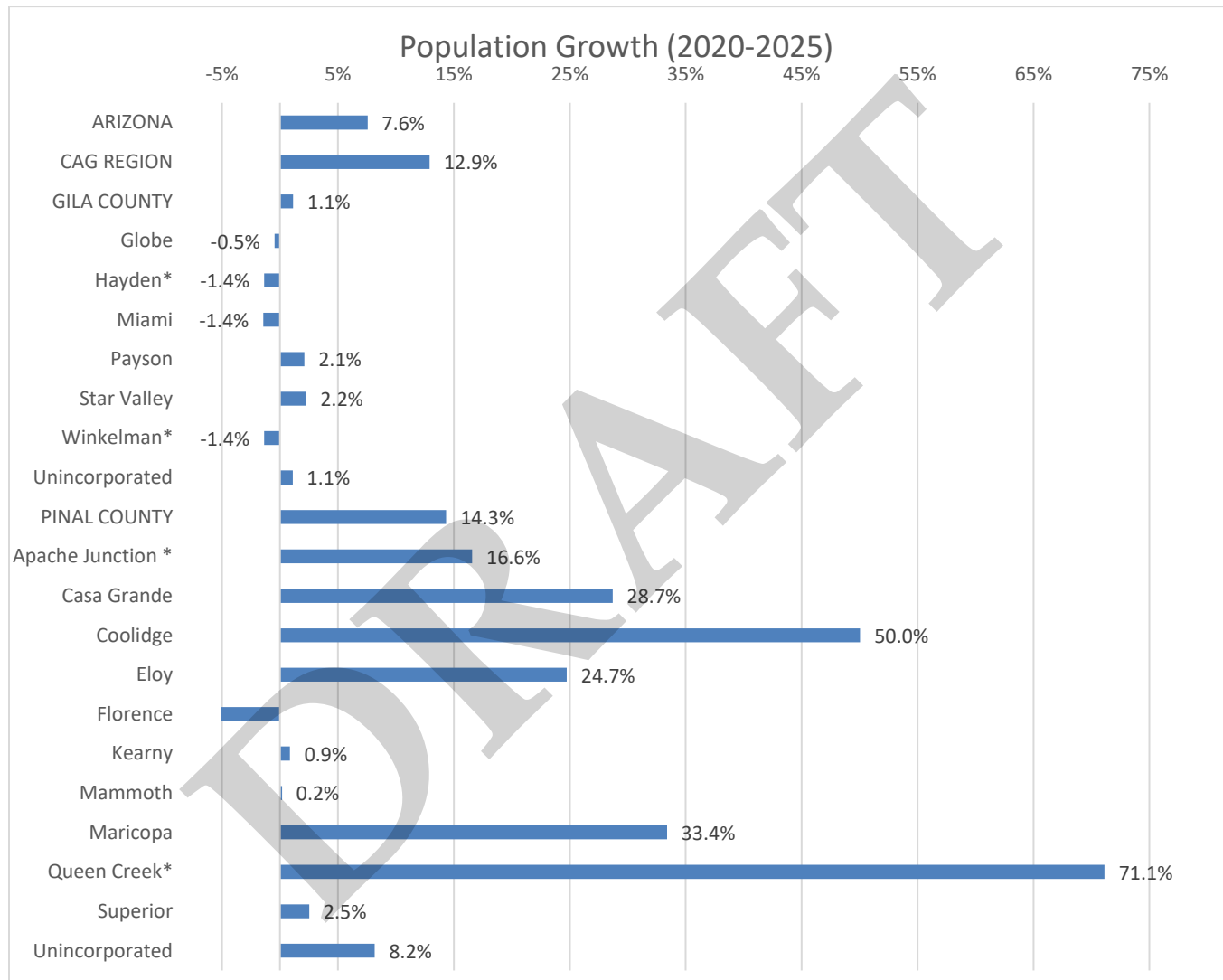


Figure 1. Population Growth, 2020-2025

Source: Arizona Office of Economic Opportunity.

Population growth within the region has been highly concentrated in Pinal County. Between 2020 and 2025, the CAG region added 63,548 residents, representing 12.9 percent growth. Pinal County added 62,943 residents, a 14.3 percent increase, while Gila County added 605 residents, a 1.1 percent increase. Several Pinal County communities experienced particularly rapid growth, including Coolidge, Maricopa, Casa Grande, Eloy, and Apache Junction.

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

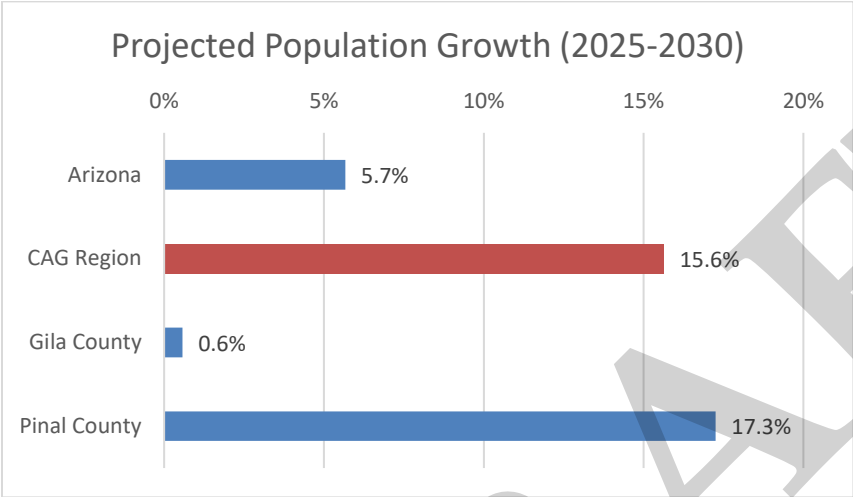


Figure 2. Projected Population Growth, 2025-2030
Source: Arizona Office of Economic Opportunity.

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.

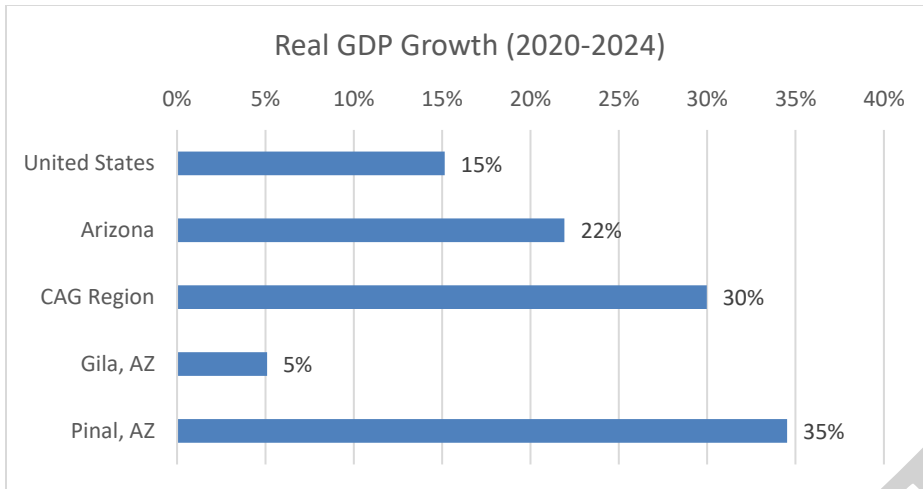


Figure 3. Real GDP Growth, 2020-2024

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, including 10.7 percent growth in Pinal County and 1.0 percent in Gila County. The data show the strength of the regional economy while also highlighting differing economic conditions between the two counties.

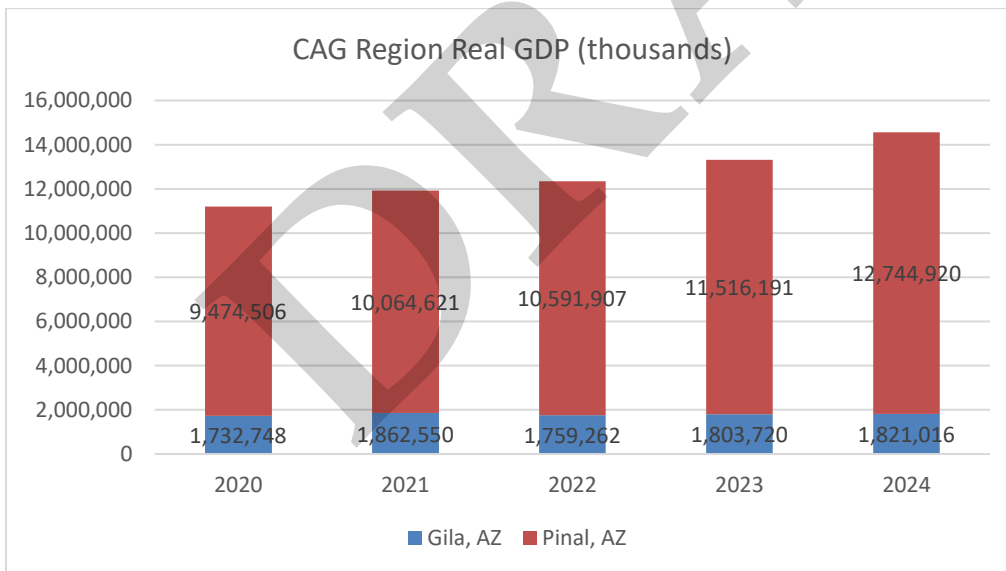


Figure 4. CAG Region Real GDP, 2020-2024

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 approximately 4.4 percent, similar to Arizona at 4.3 percent and the United States at 4.2 percent.

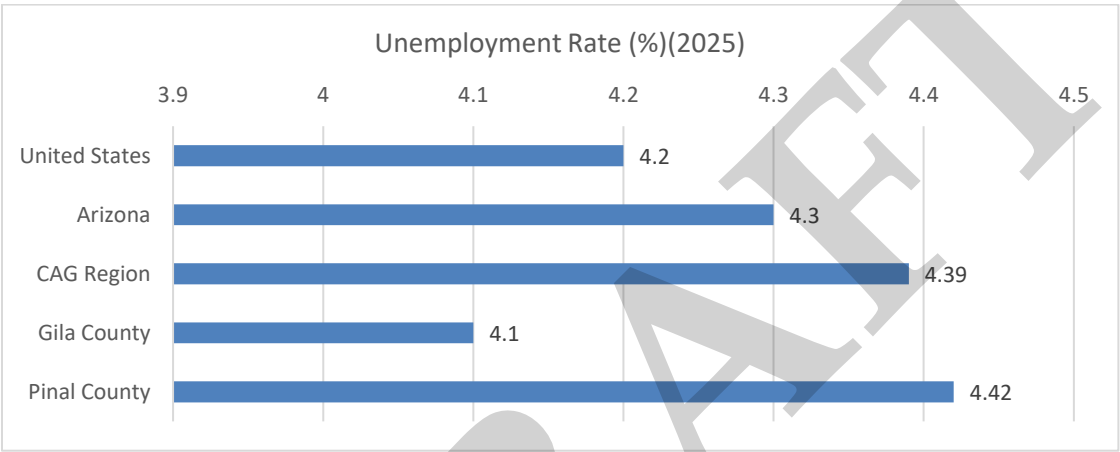


Figure 5. Unemployment Rate, 2025

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

A more significant 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 increased from 50.6 percent to 53.9 percent, while Gila County increased from 46.6 percent to 47.2 percent. The combination of a growing labor force and comparatively low participation demonstrates both an economic asset and an opportunity to expand the number of residents participating in employment.

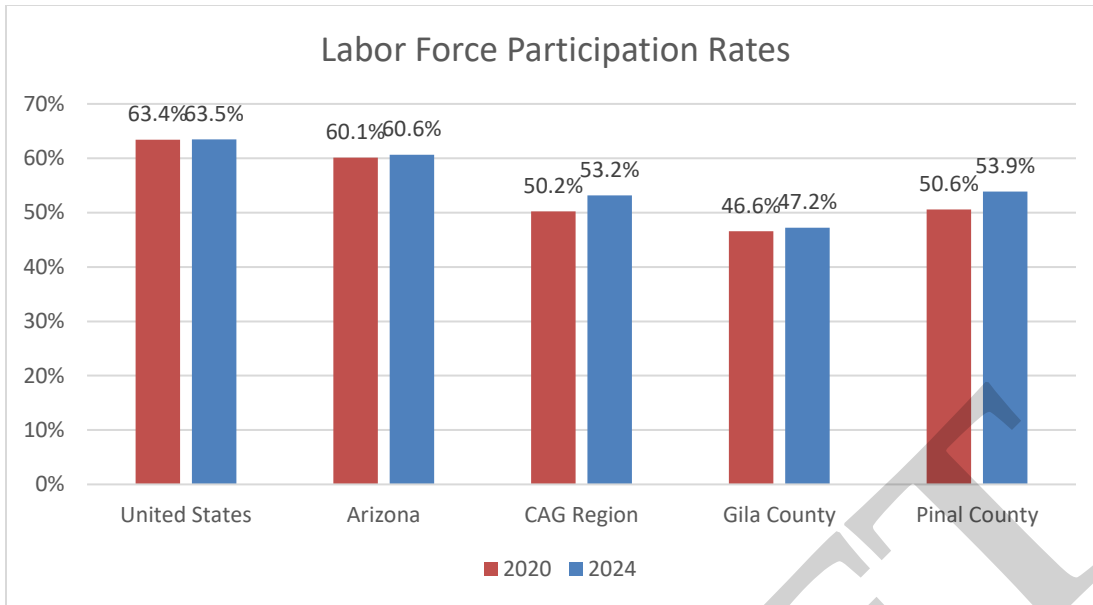


Figure 6. Labor Force Participation Rates

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

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.

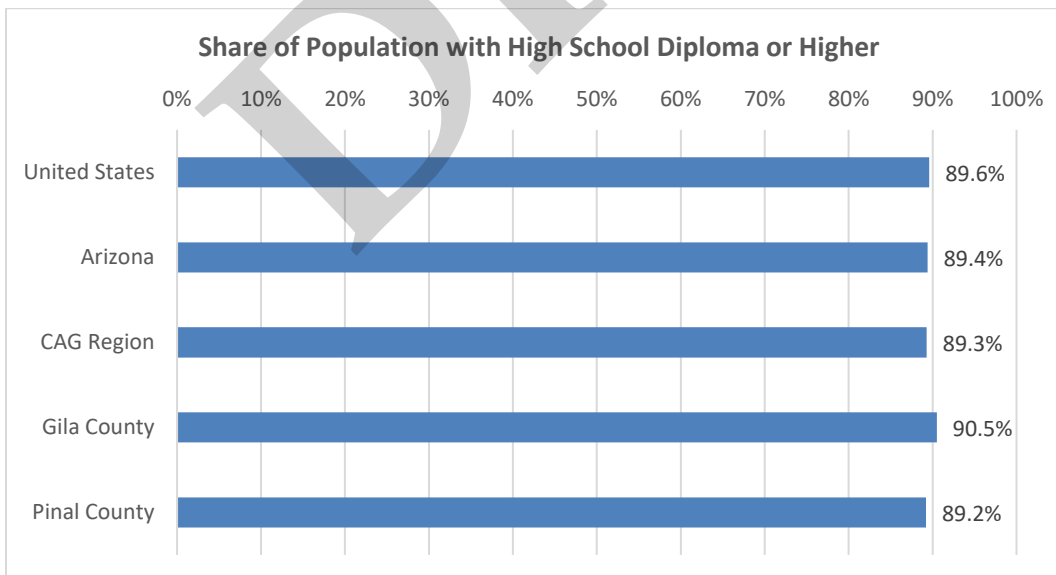


Figure 7. Population Age 25 and Older with a High School Diploma or Higher

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, well 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, postsecondary training, talent retention, and aligning education with employer needs.

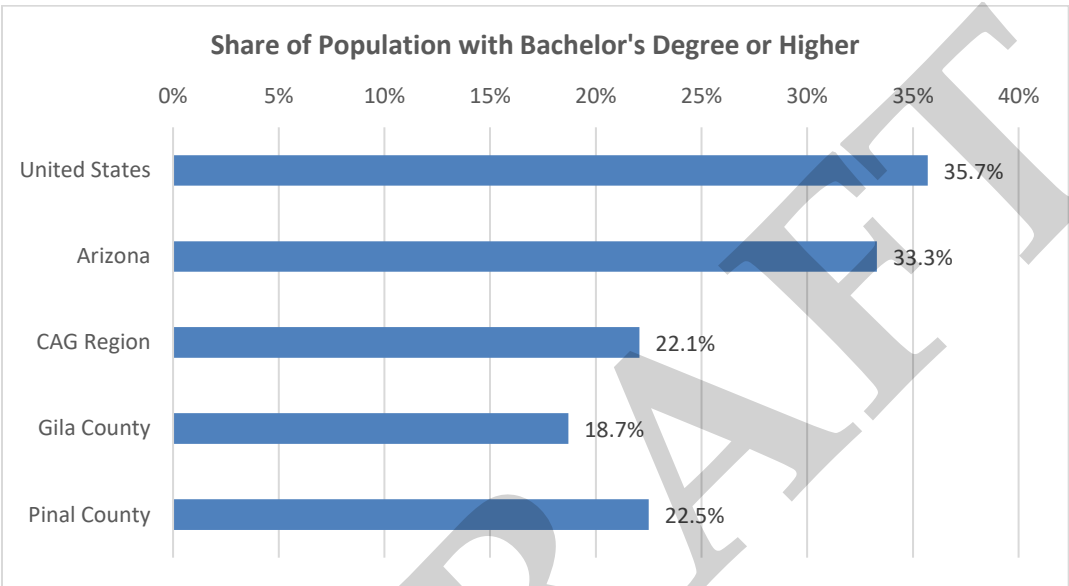


Figure 8. Population Age 25 and Older with a Bachelor's Degree or Higher

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 increased from approximately \$46,700 in 2021 to \$59,192 in 2025, representing nominal growth of approximately 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.

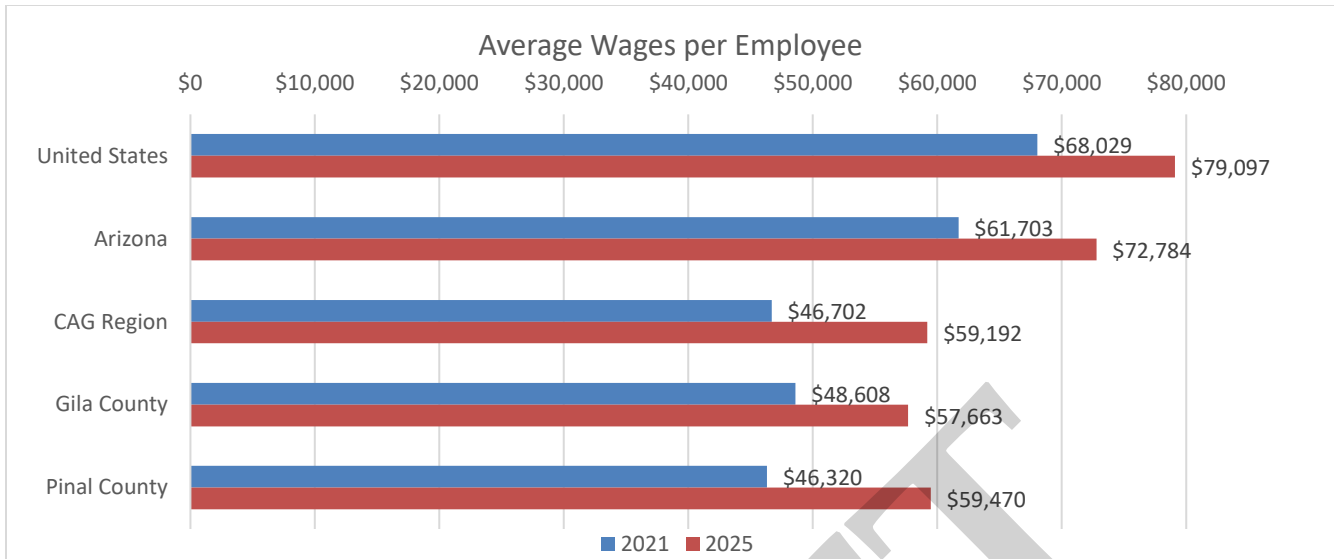


Figure 9. Average Annual Wages per Employee, 2021 and 2025

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

Per capita personal income shows a similar regional gap. CAG regional per capita personal income was approximately \$51,373 in 2024, compared with \$65,798 statewide and \$73,204 nationally. Gila County's per capita personal income was approximately \$57,097, while Pinal County's was approximately \$50,771. Regional per capita personal income 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.

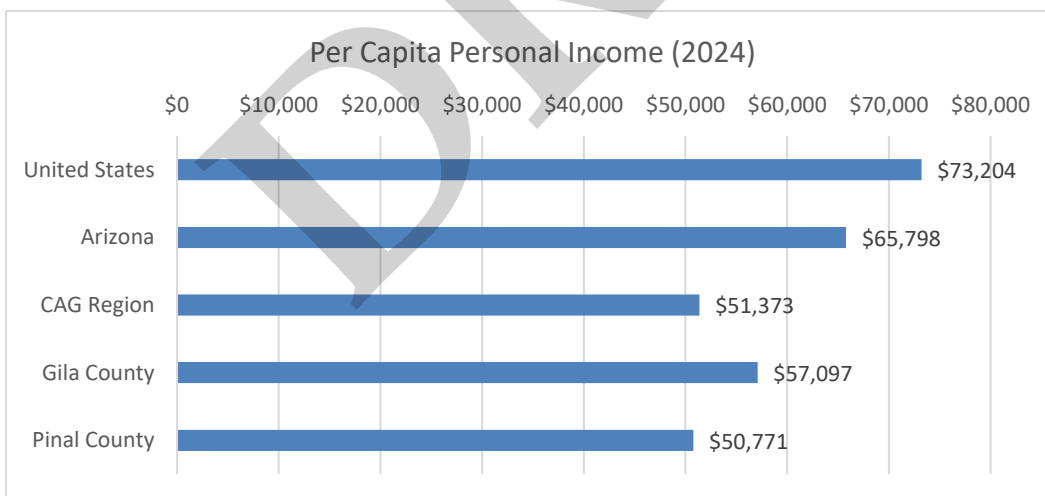


Figure 10. Per Capita Personal Income, 2024

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.

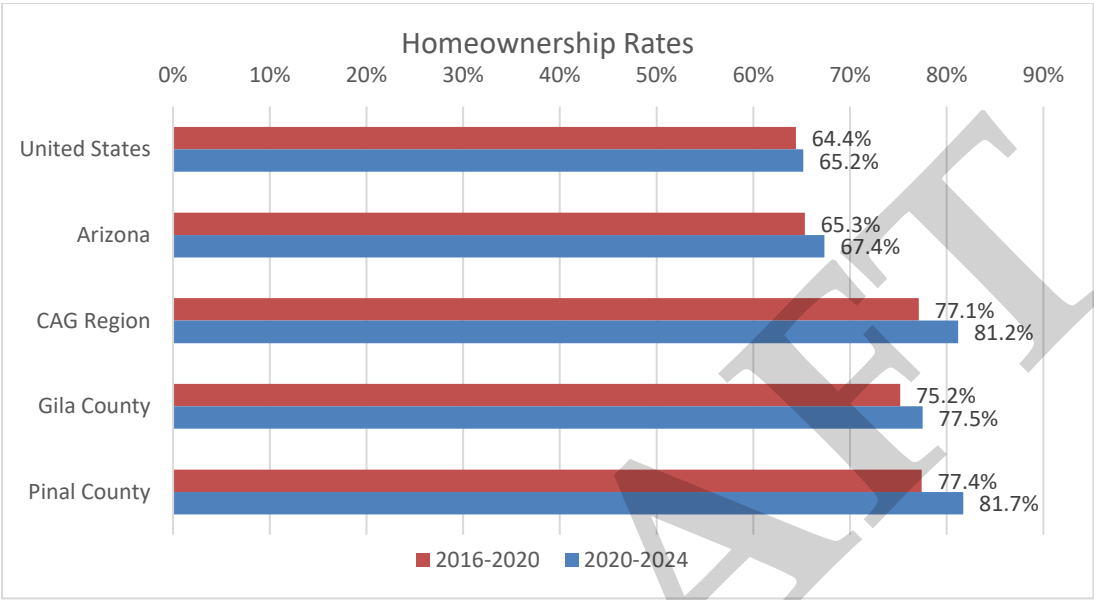


Figure 11. Homeownership Rates
Source: U.S. Census Bureau, American Community Survey 5-year estimates.

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 particularly significant in Gila County, where approximately 35.3 percent of mortgaged homeowners are cost-burdened. Pinal County's comparable share is 29.9 percent.

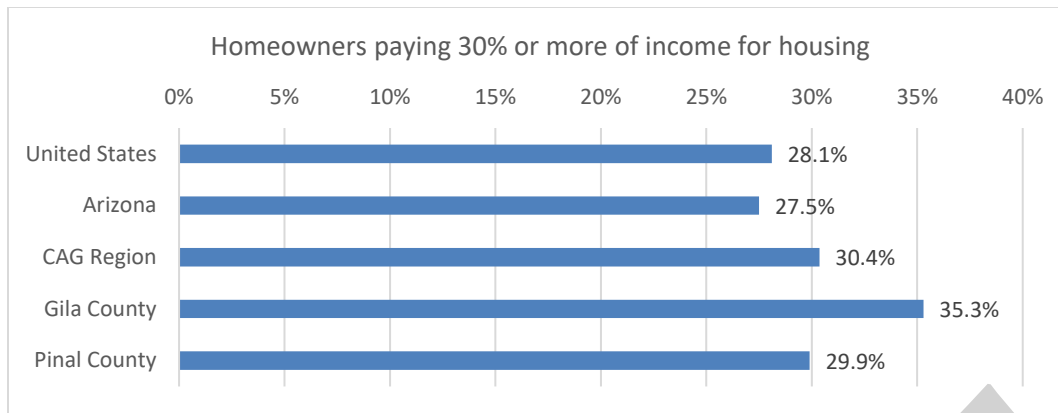


Figure 12. Homeowners Paying 30 Percent or More of Income for Housing

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 and lower than each selected peer county used for comparison. Housing units per resident are not a direct measure of vacancy 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.

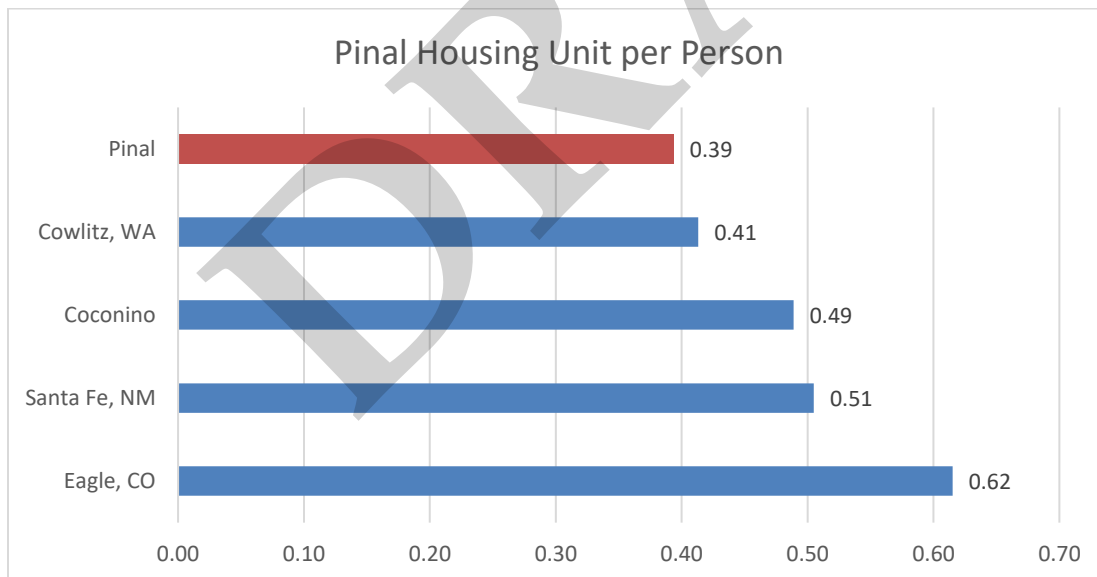


Figure 13. Pinal County Housing Units per Resident Compared with Selected Peer Counties

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, terrestrial fixed broadband service with advertised speeds of at least 100/20 Mbps was available to approximately 97.2 percent of residential broadband-serviceable locations in Pinal County. 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.

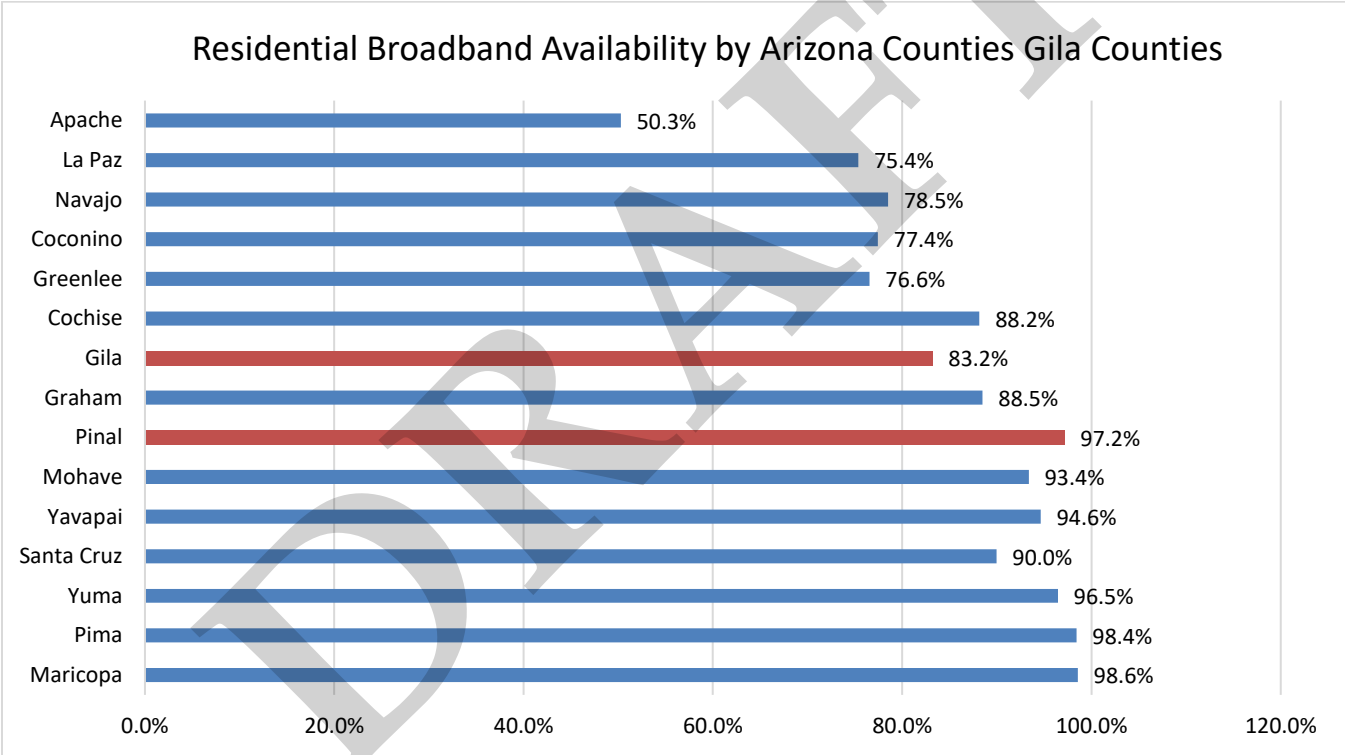


Figure 14. Residential Fixed Broadband Availability at 100/20 Mbps by Arizona County
Source: Federal Communications Commission, Broadband Data Collection, December 31, 2025. Percent represents residential broadband-serviceable locations with terrestrial fixed service available at advertised speeds of 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 approximately \$821.0 million in 2020 to \$1.36 billion in 2024, an increase of approximately 65.3 percent. In 2024, direct travel spending totaled approximately \$981.6 million in Pinal County and \$375.8 million in Gila County.

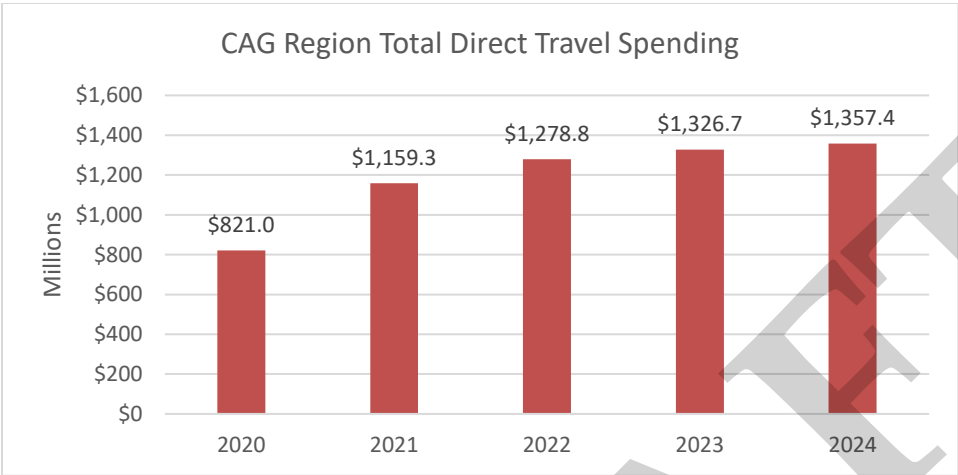


Figure 15. CAG Region Total Direct Travel Spending, 2020-2024

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

Visitor spending supports a broad range of regional businesses. In 2024, major visitor spending categories included approximately \$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 demonstrate tourism's connections to small businesses, recreation, hospitality, retail, and community quality of place throughout the CAG region.

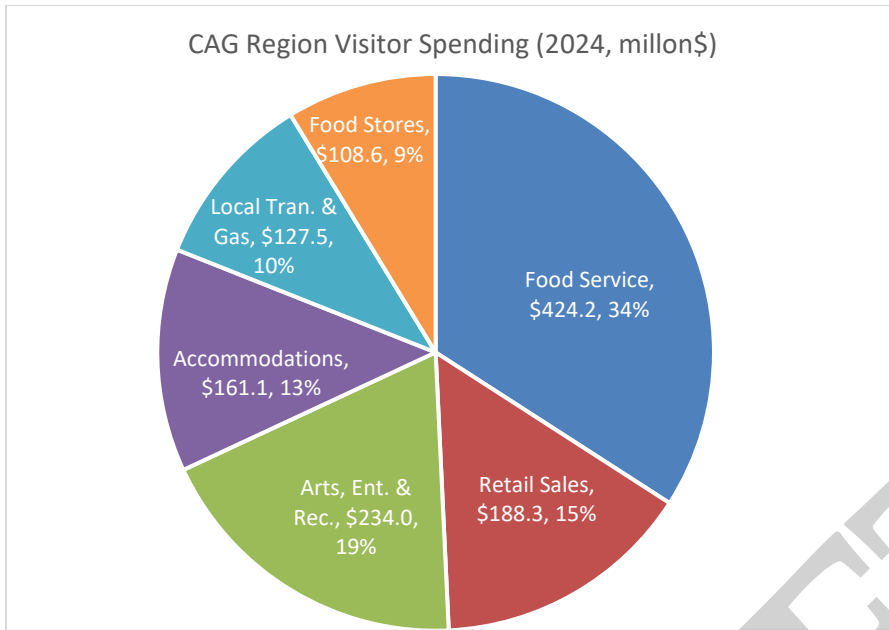


Figure 16. CAG Region Visitor Spending by Category, 2024

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 are included as a statewide reference to provide context for the differences in conditions across the Tribal communities.

Table 1. Key Social and Economic Indicators for the Four Tribal Communities

Indicator	Ak-Chin Indian Community ¹	Gila River Indian Community ²	San Carlos Apache Tribe ³	White Mountain Apache Tribe ⁴	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	\$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 ⁵	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	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: 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.

¹ Census geography: Maricopa (Ak Chin) Indian Reservation and Off-Reservation Trust Land.

² Census geography: Gila River Indian Reservation.

³ Census geography: San Carlos Reservation.

⁴ Census geography: Fort Apache Reservation.

⁵ Overcrowding is defined as more than one person per room, based on HUD convention. “Room” means rooms suitable for living purposes, not bedrooms.