



# Pinal County Trends & Projections

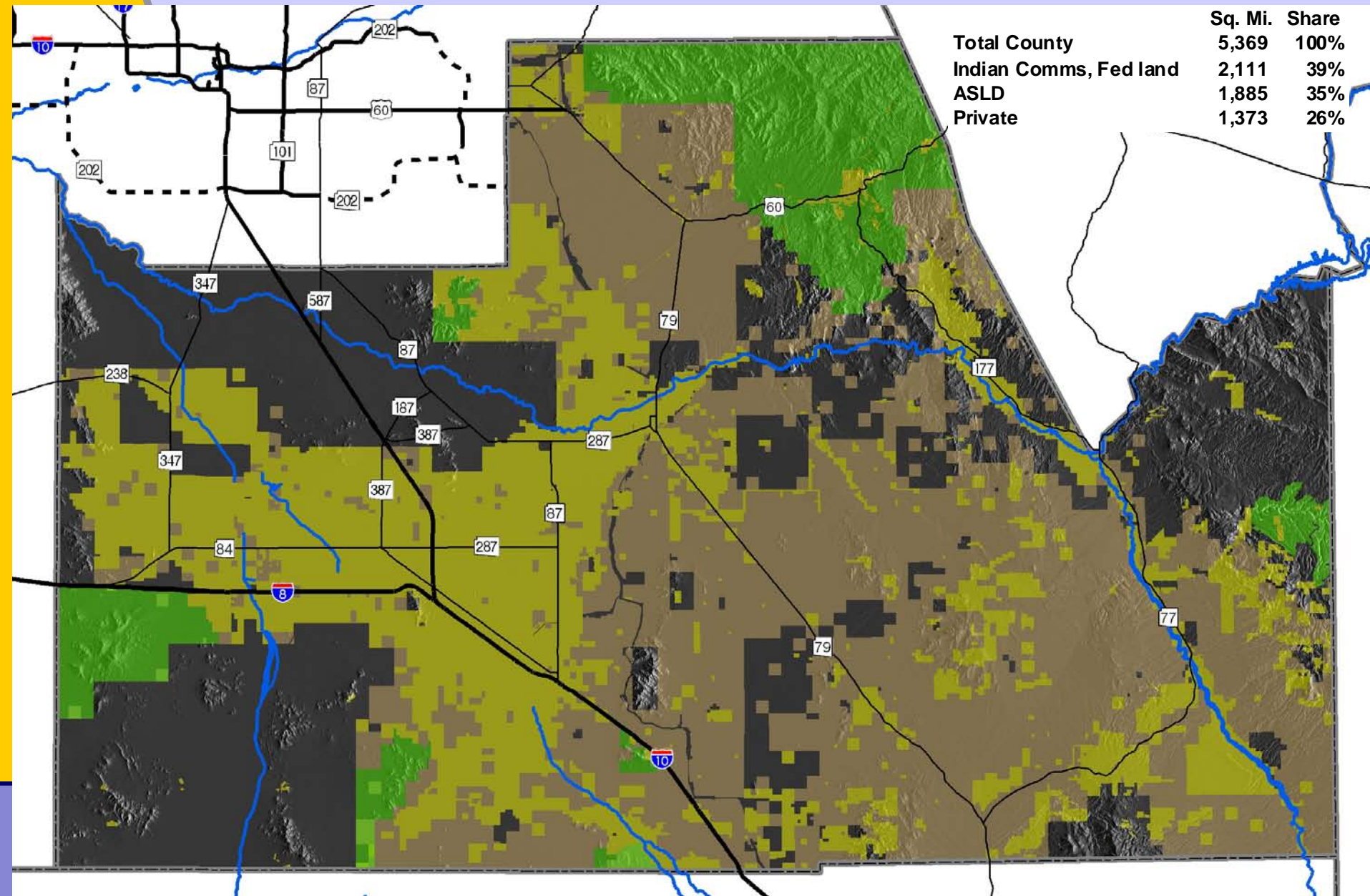
March 4, 2009

# Topics

- ◆ Geographic patterns
- ◆ Key trends
- ◆ Projections



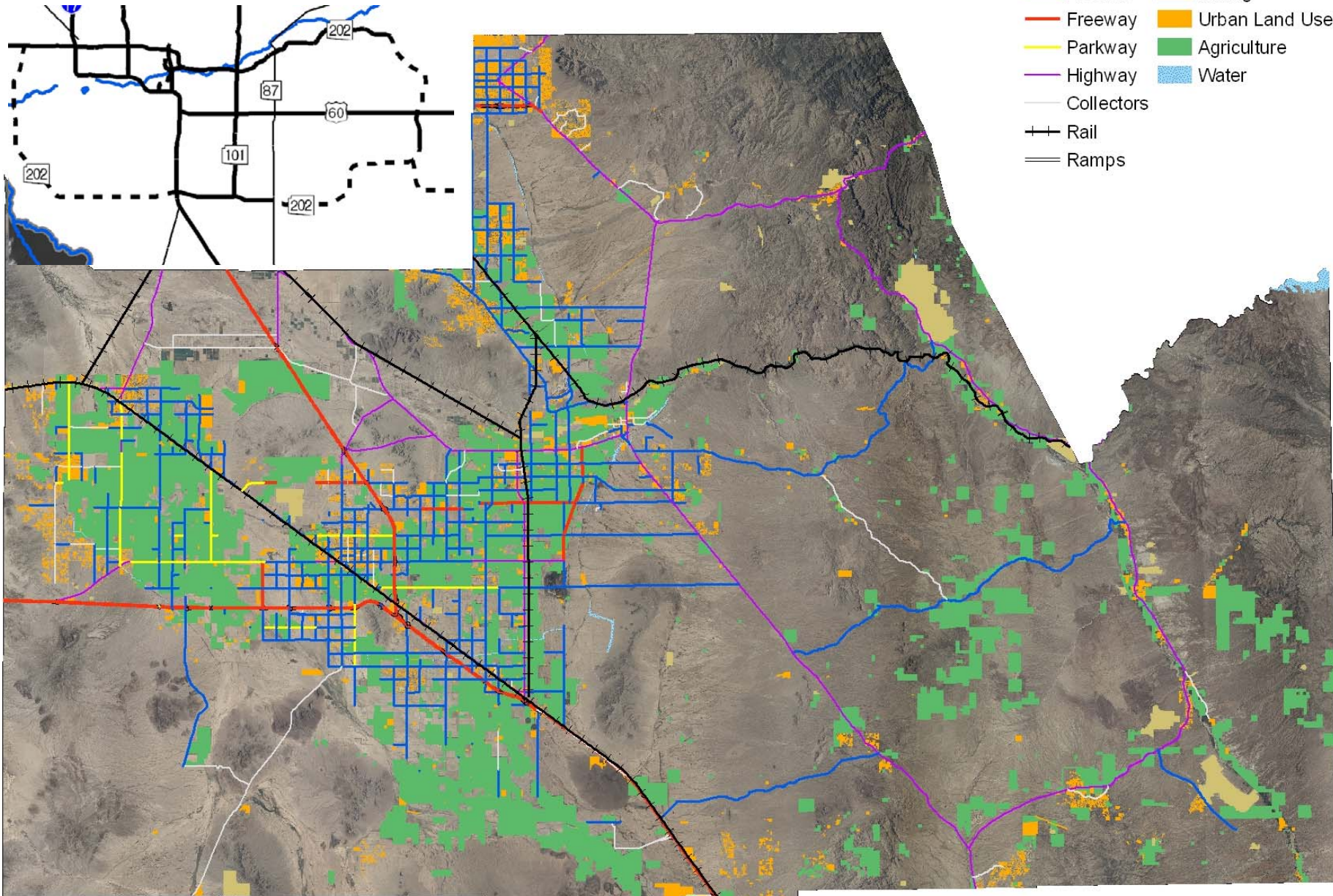
# Land ownership patterns



Central Arizona Association of Governments  
Existing Land Use, 2006  
Pinal County

**Legend**

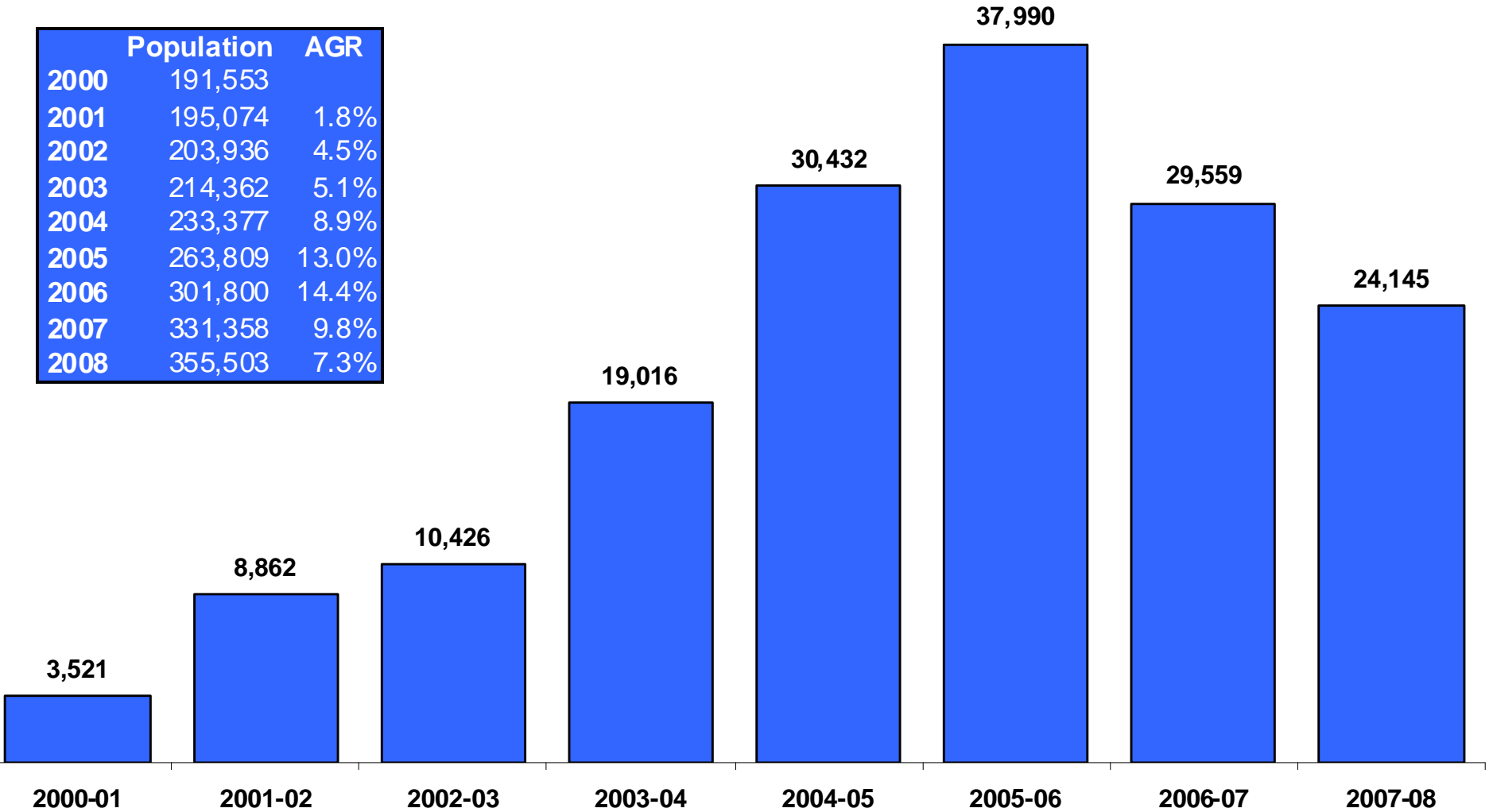
- |  |   |
|--|---|
|  Arterials  |  Mining          |
|  Freeway    |  Urban Land Uses |
|  Parkway    |  Agriculture     |
|  Highway    |  Water           |
|  Collectors |   |
|  Rail       |   |
|  Ramps      |   |



# Pinal County Population Change

Central Arizona Association of Governments, December 2008

	Population	AGR
2000	191,553	
2001	195,074	1.8%
2002	203,936	4.5%
2003	214,362	5.1%
2004	233,377	8.9%
2005	263,809	13.0%
2006	301,800	14.4%
2007	331,358	9.8%
2008	355,503	7.3%

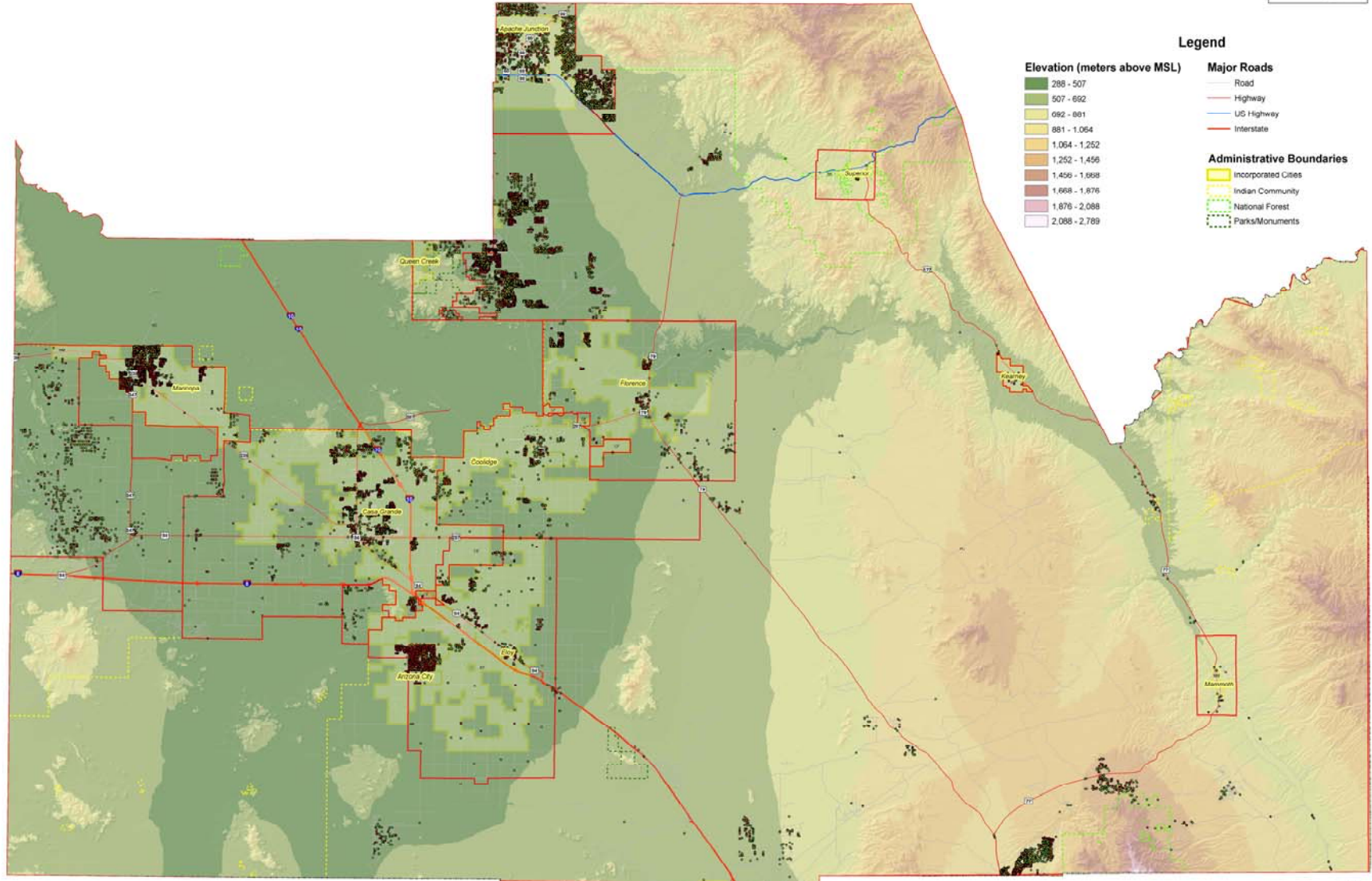


# Population trends by jurisdiction

	<b>2000</b>	<b>2008</b>	<b>Abs. Change</b>	<b>% Change</b>	<b>Share of Chg</b>
<b>County Total</b>	191,553	355,503	163,950	86%	100.0%
<b>Uninc. Pinal County</b>	79,891	165,998	86,106	108%	52.5%
<b>Casa Grande</b>	25,387	44,547	19,161	75%	11.7%
<b>Apache Junction (pt)</b>	32,204	37,604	5,400	17%	3.3%
<b>Maricopa</b>	1,040	37,196	36,156	3477%	22.1%
<b>Florence</b>	17,215	24,068	6,853	40%	4.2%
<b>Eloy</b>	10,375	16,152	5,777	56%	3.5%
<b>Coolidge</b>	7,808	12,176	4,368	56%	2.7%
<b>Superior</b>	3,254	3,371	117	4%	0.1%
<b>Kearny</b>	2,249	2,282	33	1%	0.0%
<b>Mammoth</b>	1,762	1,787	25	1%	0.0%
<b>Queen Creek (pt)</b>	119	501	382	321%	0.2%



# Central Arizona Association of Governments E-SIZE RESIDENTIAL COMPLETIONS IN PINAL COUNTY



0 5 10 20 Miles

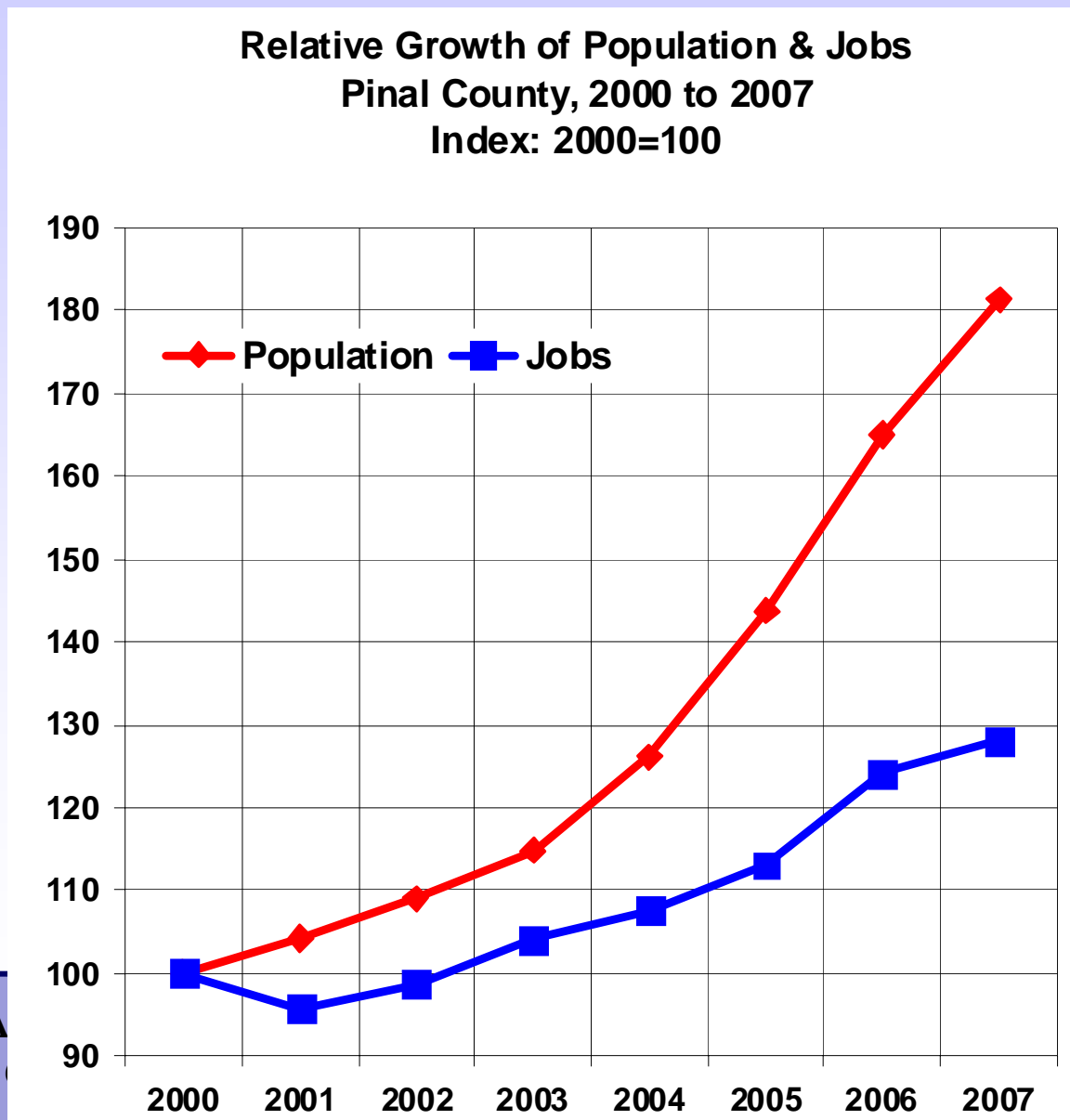
Data Sources: Pinal County, A/RIS, USGS, CAAG Member Agencies

File: ESize\_Pinal\_Template.mxd Map Date: March 7th, 2007 Author: Howard Ward

Disclaimer: this map does not represent a legal survey. It is intended for general planning purposes only.



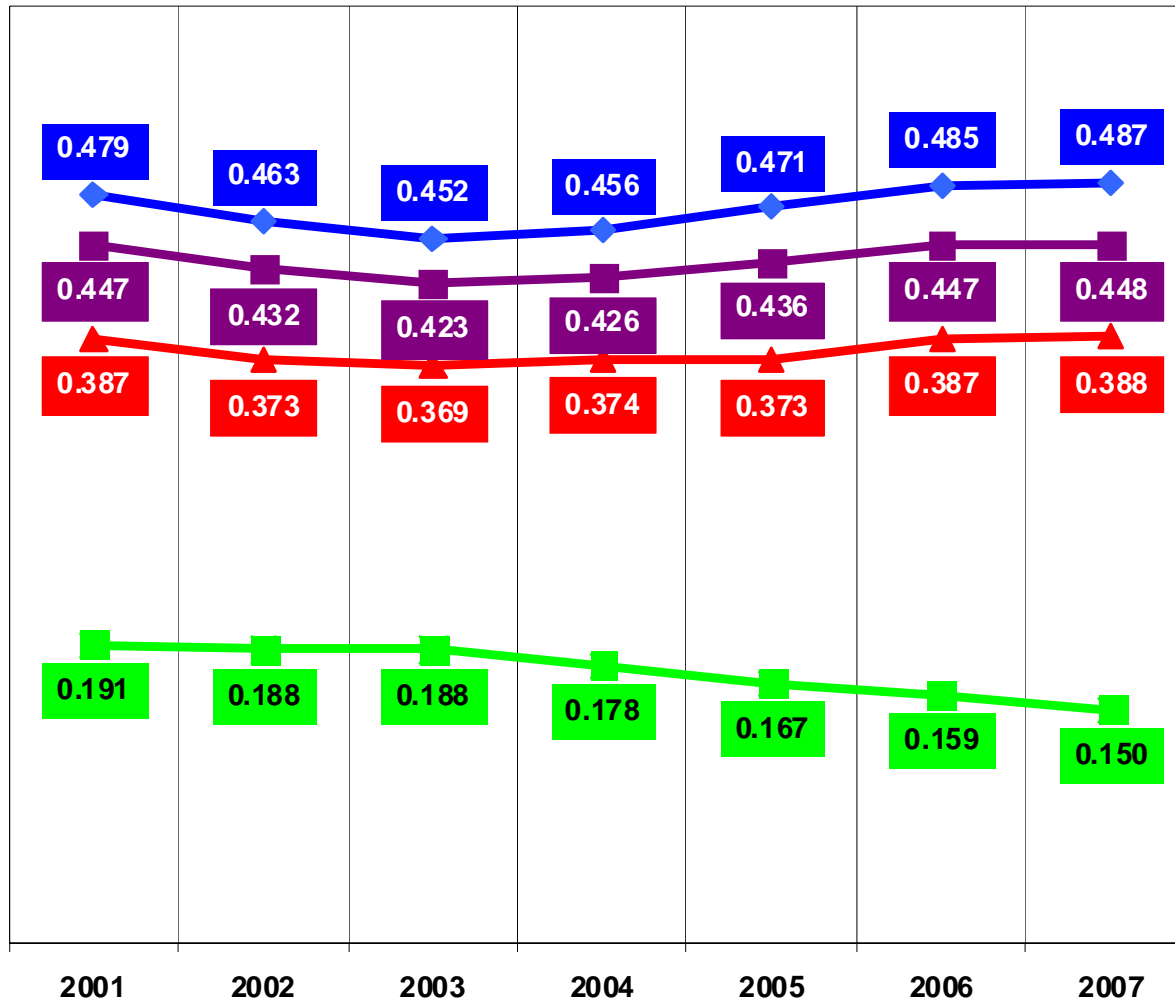
# Much higher residential growth starting in 2004, without corresponding job growth



# Consequently, Pinal jobs-housing balance declined rapidly

Arizona Sun Corridor Counties  
2001 through 2007

◆ Maricopa    ■ 3-County Total    ▲ Pima    ■ Pinal



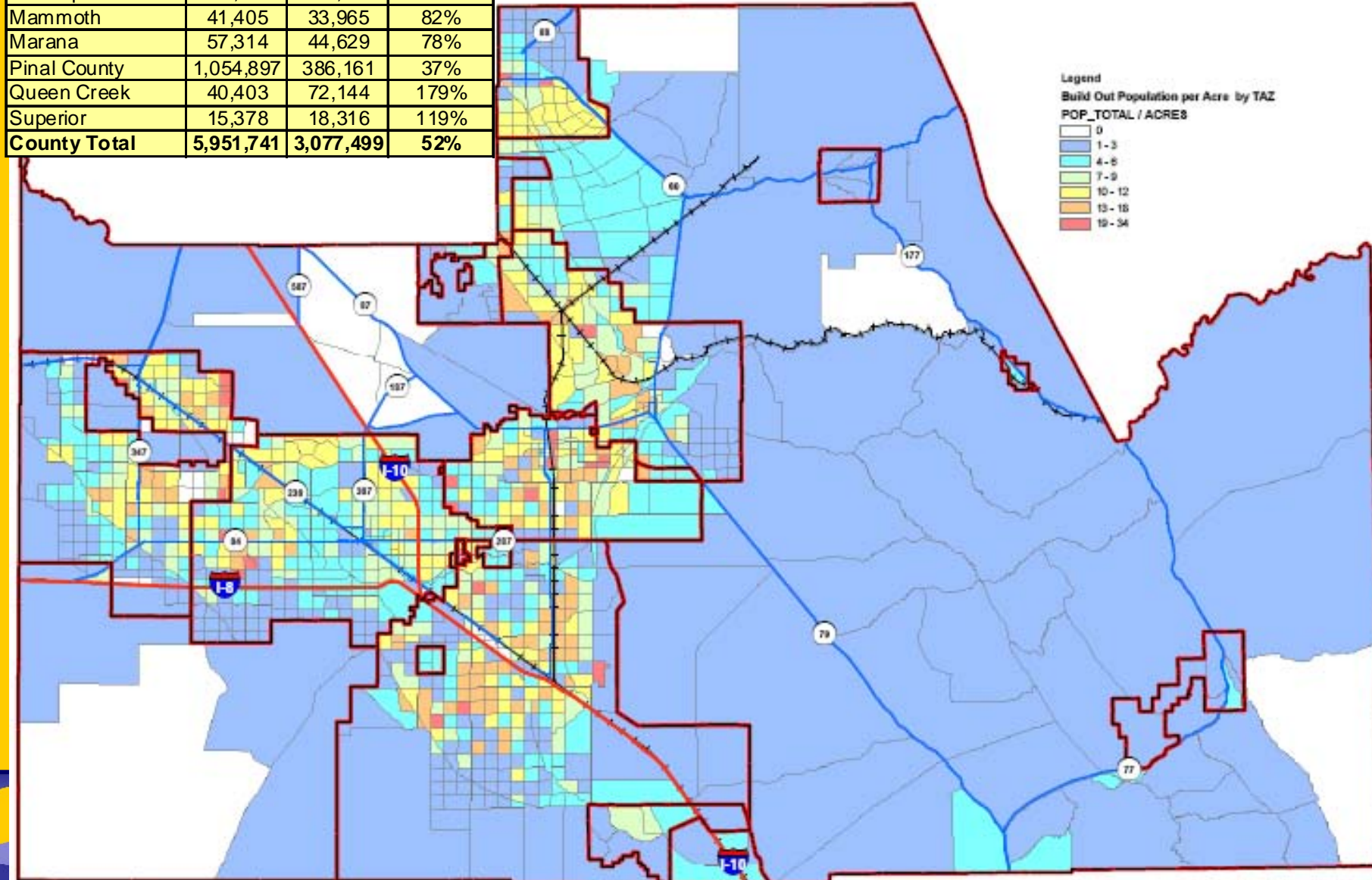
Maricopa grows slightly  
Pima remains constant  
Region remains constant

**Pinal - 21% decline**

GOVERNMENTS

# Build-out population density, Feb. 2009 plans

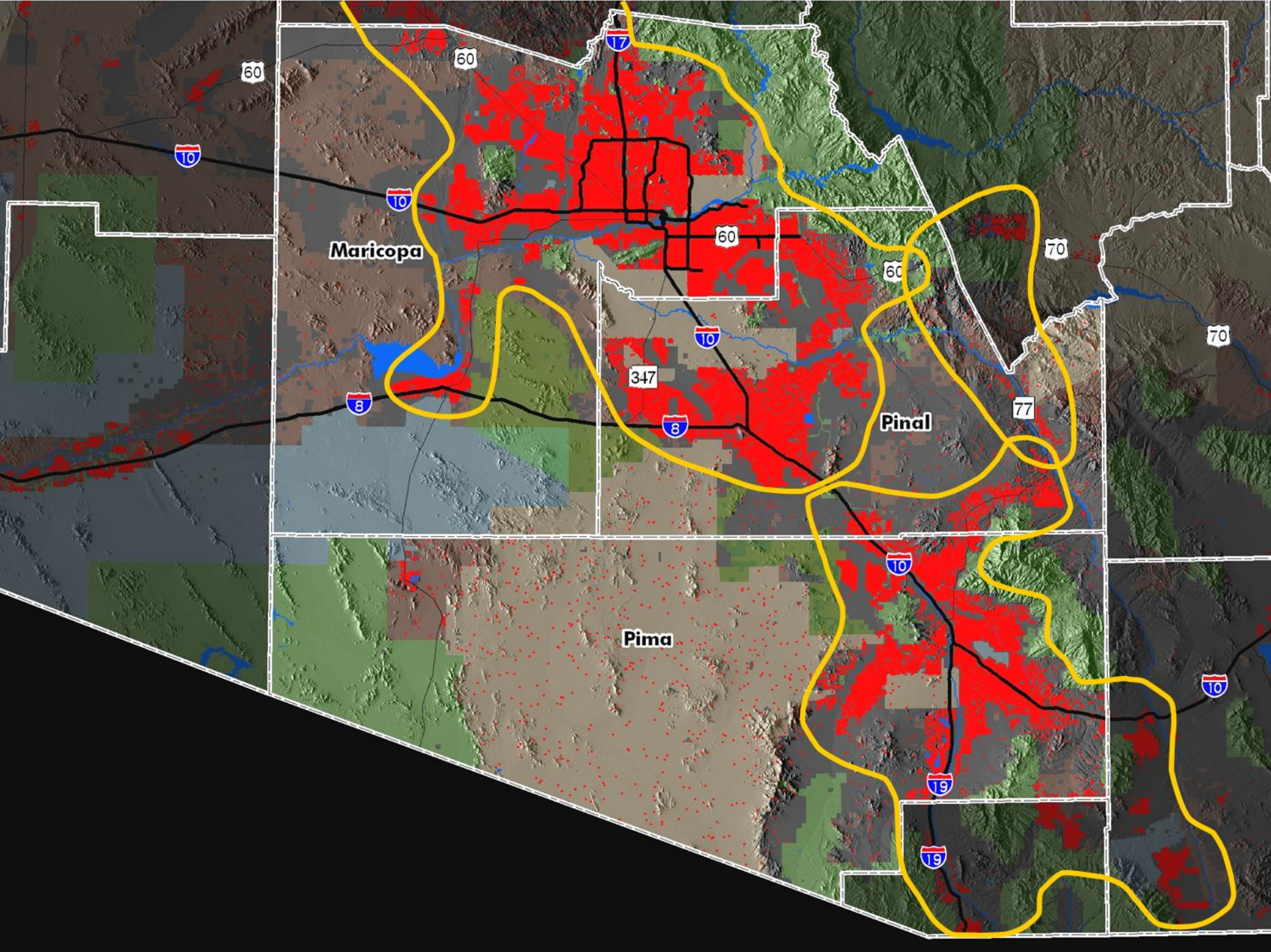
MPA Name	Pop	Jobs	Jobs-Pop
Apache Junction	241,749	126,708	52%
Casa Grande	966,357	437,984	45%
Coolidge	687,972	556,112	81%
Eloy	1,196,802	497,206	42%
Florence	753,200	363,097	48%
Kearny	5,984	8,018	134%
Maricopa	750,868	453,339	60%
Mammoth	41,405	33,965	82%
Marana	57,314	44,629	78%
Pinal County	1,054,897	386,161	37%
Queen Creek	40,403	72,144	179%
Superior	15,378	18,316	119%
<b>County Total</b>	<b>5,951,741</b>	<b>3,077,499</b>	<b>52%</b>



# Pinal County projections made since 2003

	2010	2020	2030	2040
<b>Low</b>	374	610	852	1,082
<b>High</b>	475	1,161	1,900	2,376
<b>Average</b>	410	881	1,444	1,881
<b>Std. Dev.</b>	51	159	323	446
<b>Std. Dev. %</b>	13%	18%	22%	24%
	2010	2020	2030	2040
MAG (2003)	514	1,161	1,614	1,780
AE/CAC (2004)	374	769	NA	NA
EP Cons (2005)	452	978	NA	NA
EP Aggr (2005)	475	1,077	NA	NA
DES (2006)	365	610	852	1,082
Lima (2006)	NA	NA	1,900	NA
AE/CAC (2008)	398	881	NA	NA
CAAG Members (2008)	378	865	1,568	2,376
EP Cons (2009)	376	762	1,295	1,882
EP Base (2009)	382	841	1,400	1,987
EP Aggr (2009)	384	864	1,480	2,178

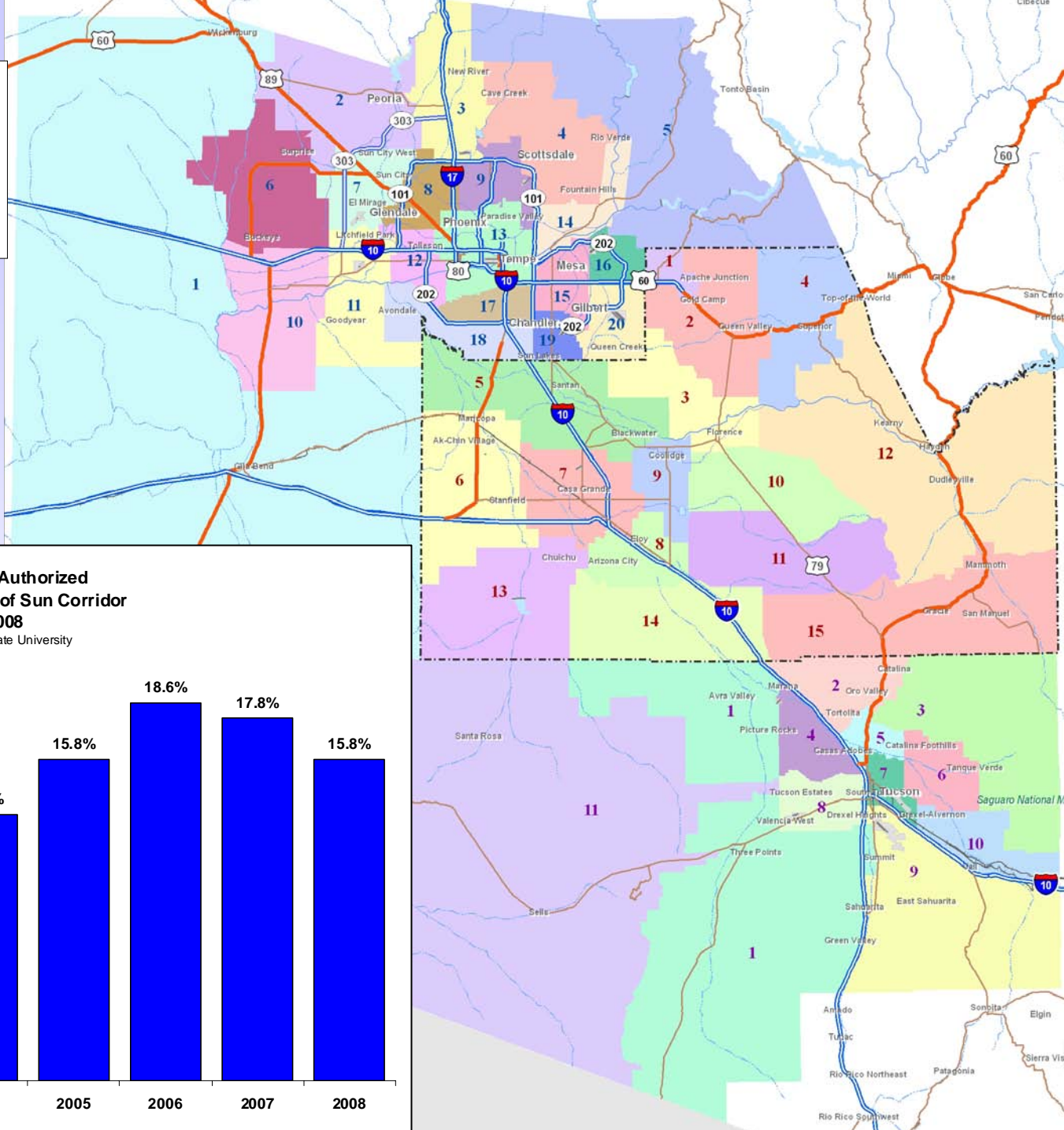




# Pinal Projections Study - Approach

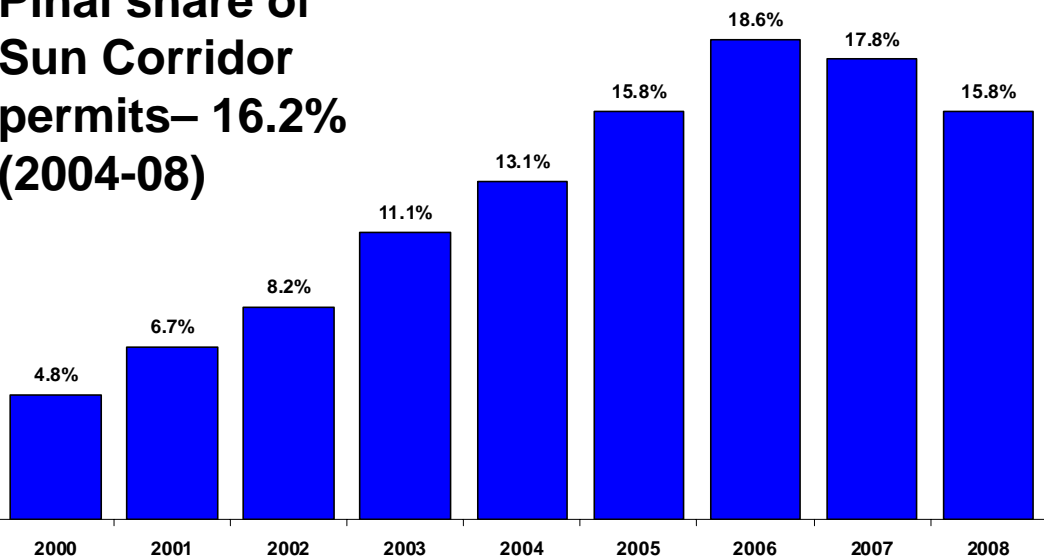
- ◆ Three steps
  1. “Sun Corridor” – 3-county region analysis & projections
  2. Market area analysis & allocation model
  3. Sum Pinal County market areas to arrive at County total
- ◆ Three scenarios, for both Sun Corridor & Pinal County
  - ◆ “Most likely” to be approved as official CAAG projections for Pinal County
  - ◆ County projections then allocated to TAZ & MPA – also to be approved as official CAAG projections

**46 Market Areas**  
**Maricopa – 20**  
**Pinal – 15**  
**Pima - 11**



**Housing Units Authorized**  
**Pinal County Share of Sun Corridor**  
**2000-2008**  
 Source: Arizona State University

**Pinal share of Sun Corridor permits— 16.2% (2004-08)**



# Sun Corridor projections - determinants of growth

- ◆ In the long term, supply factors matter
  - ◆ Labor force
  - ◆ Capital stock (infrastructure AND human)
  - ◆ Technological progress
- ◆ For the 3-county area, population growth is the most important
  - ◆ Migration flows – main driver – from jobs growth
  - ◆ Natural increase



# Sun Corridor projections - assumptions

- ◆ US projections, three scenarios – Global Insight, October 2008
- ◆ Sun Corridor population assumptions
  - ◆ Birth & death rates held constant
  - ◆ Hispanic & non-Hispanic demographics modeled separately
  - ◆ Most population change from net migration, most of which from job growth
  - ◆ Gas prices at \$4/gal by 2015, then held constant

# Sun Corridor projections – economic growth assumptions

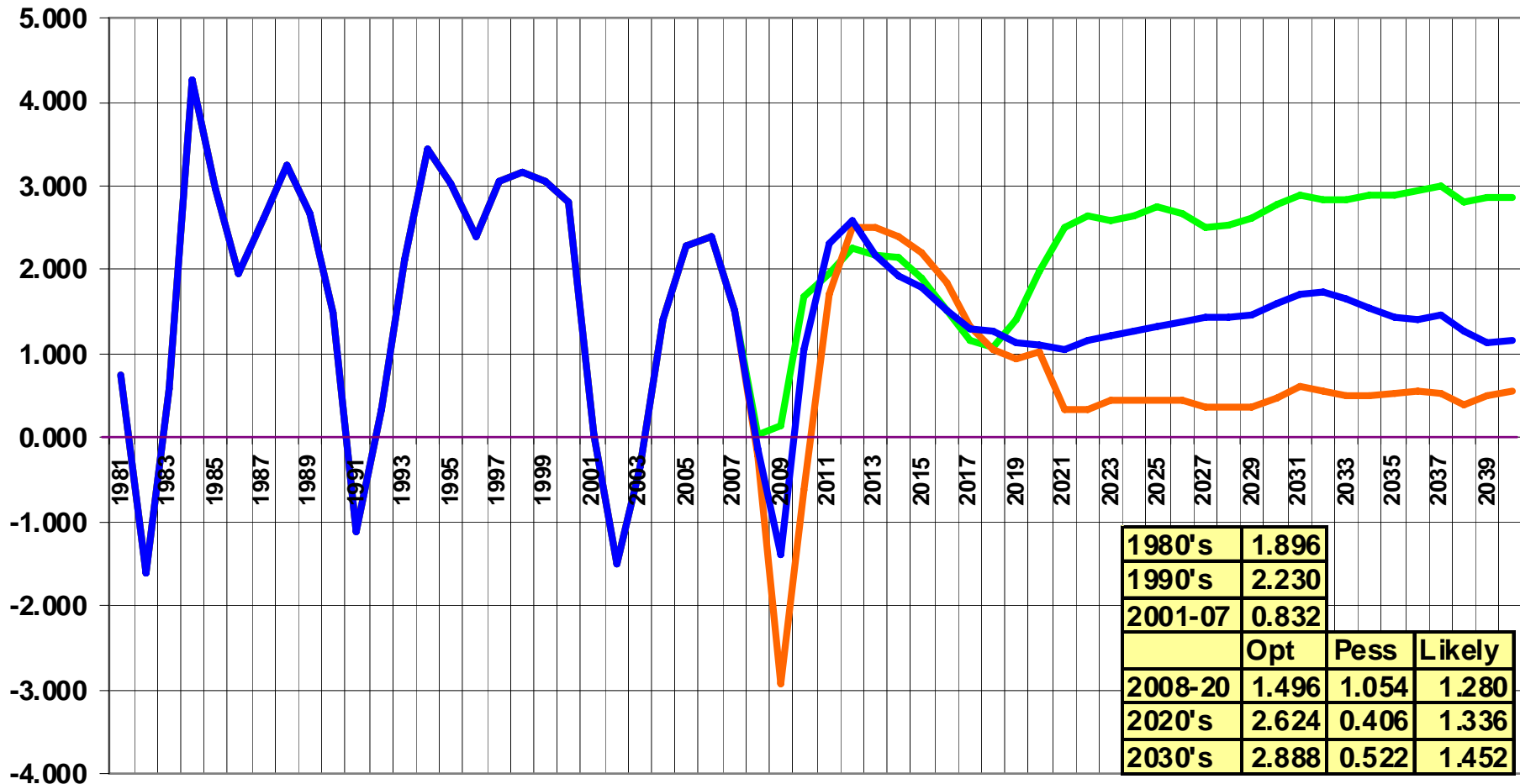
- ◆ “Most likely” scenario
  - ◆ Investment in education and infrastructure remains on a business-as-usual basis
  - ◆ Housing prices remain at half of LA
- ◆ Optimistic scenario
  - ◆ Lower housing prices - high rate of in-migration
  - ◆ State - higher expenditures for education and infrastructure on a sustained basis
    - ◆ Better education
    - ◆ Improved workforce skills
    - ◆ Increased attraction of higher waged industries
    - ◆ Higher average wage levels & a better quality of life
  - ◆ Increased economic opportunities result in lower birth rates for working aged Hispanic females
- ◆ Pessimistic scenario
  - ◆ Higher housing prices - slower in-migration rates
  - ◆ Expenditures for education & infrastructure - inadequate to support population growth

# US employment projections – as of October, 2008

## Change in Nonfarm Wage & Salary Jobs United States, 1981-2040

Source: Global Insights, October 2008

Most Optimistic Most Pessimistic Most Likely

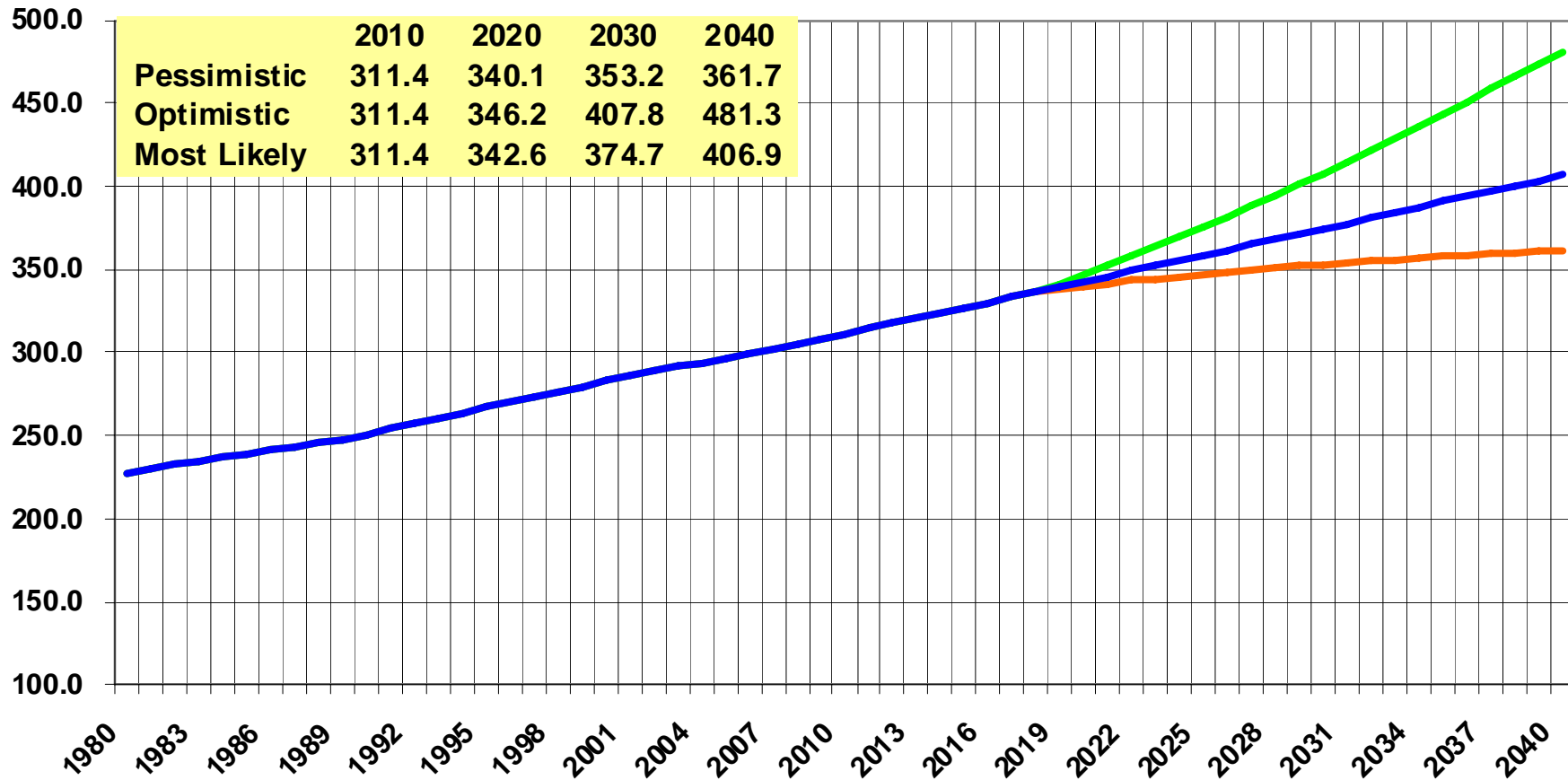


# US population projections – as of October, 2008

## Population United States, 1981-2040 (millions)

Source: Global Insight, October 2008

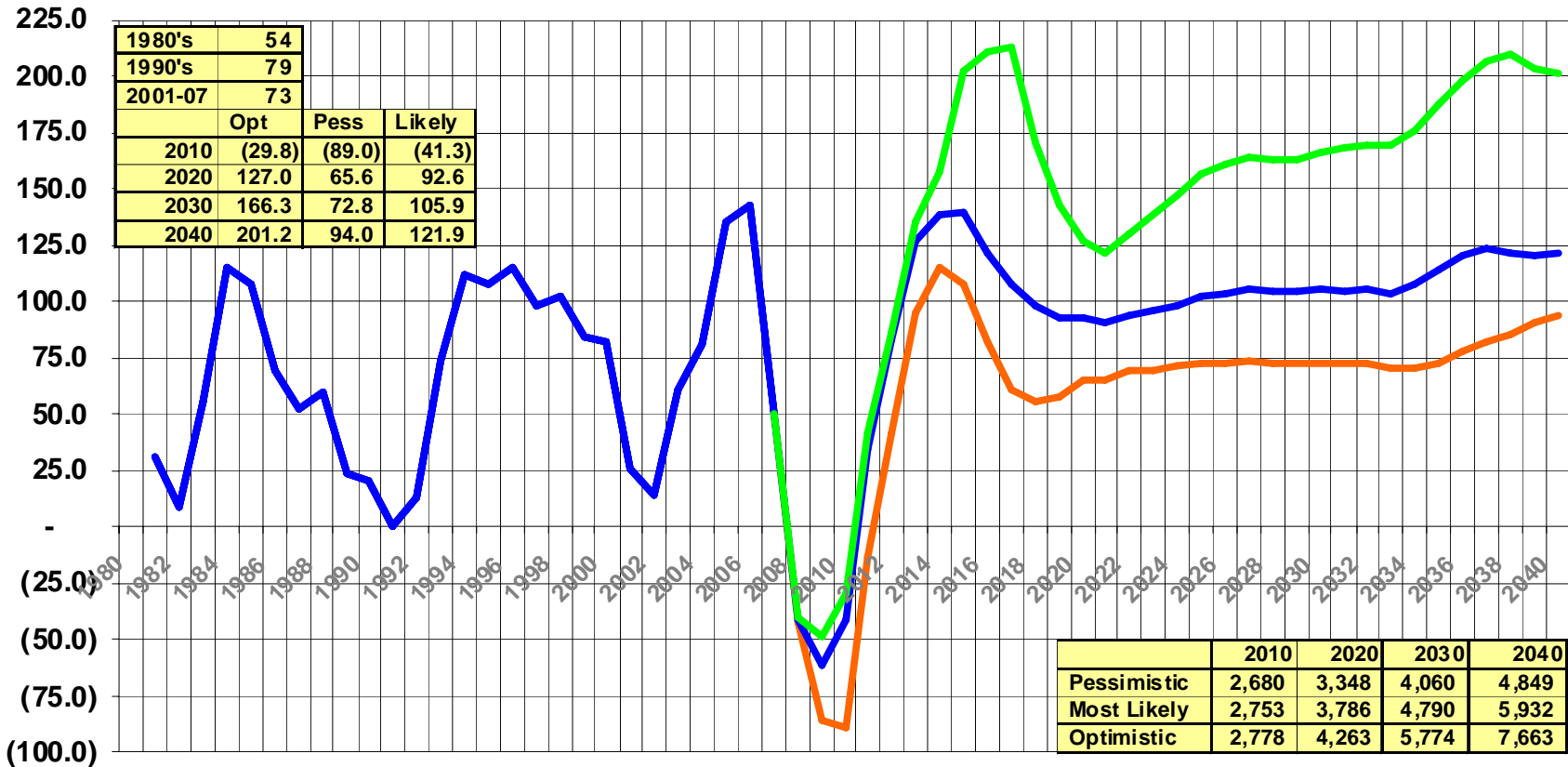
— Pessimistic — Optimistic — Most Likely



# Sun Corridor projections – annual employment change

Jobs - Annual Change  
Sun Corridor  
1981-2040  
(000's)

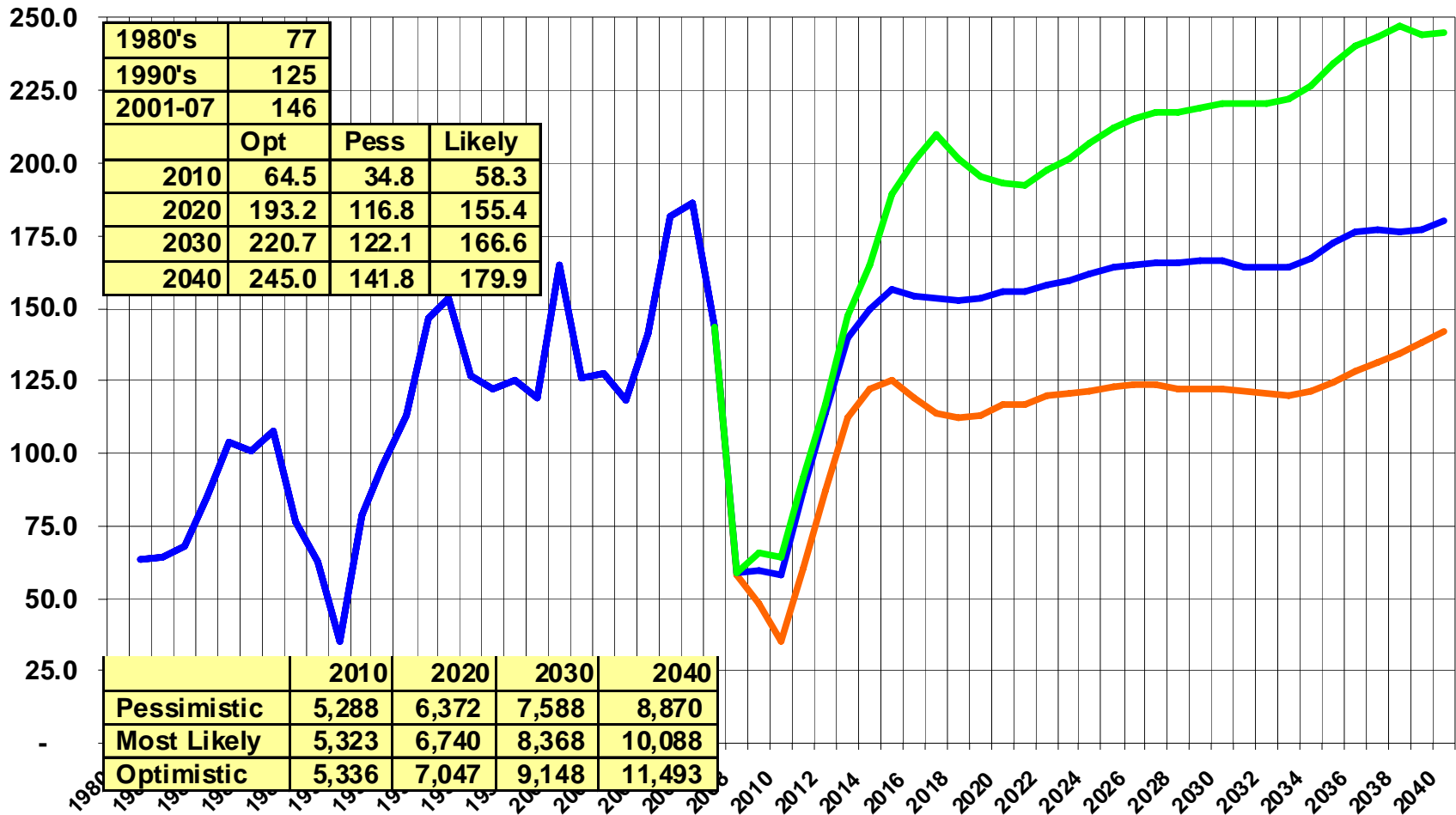
— Pessimistic — Likely — Optimistic



# Sun Corridor projections – annual population change

Population - Annual Change  
Sun Corridor  
1981-2040  
(000's)

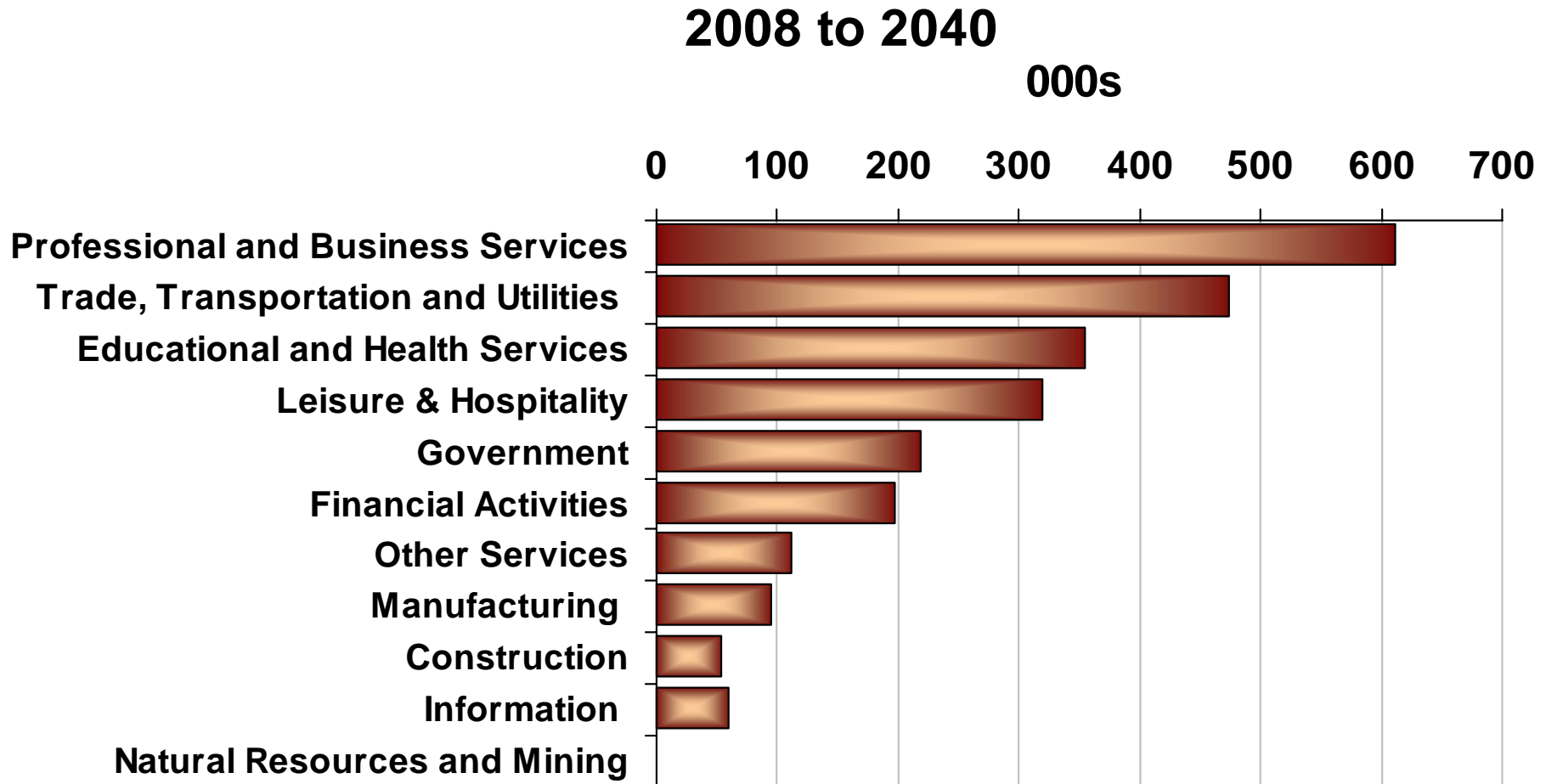
— Pessimistic — Likely — Optimistic



# Demographic highlights

- ◆ Population growth rate moderates from 3.7% annually in decade of 1990s to 1.9% in 2030s
- ◆ Hispanic population's share grows from 31.5% today to 46.4% in 2040
- ◆ Net migration flows stabilize at 100,000 per year rather than trending ever upward
  - ◆ An increasing share is age 65 and over
- ◆ Proportion of 65+ rises from 12% to 18%

# Changes in Employment



# Projections Study- three workshops

- ◆ January workshop – Sun Corridor Region projection scenarios
- ◆ Second workshop – Development patterns across 46 market areas
- ◆ Last workshop – Draft projection scenarios for Pinal County & its market areas
- ◆ Study website:  
<http://appliedeconomics.net/caag/>



# For further information

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