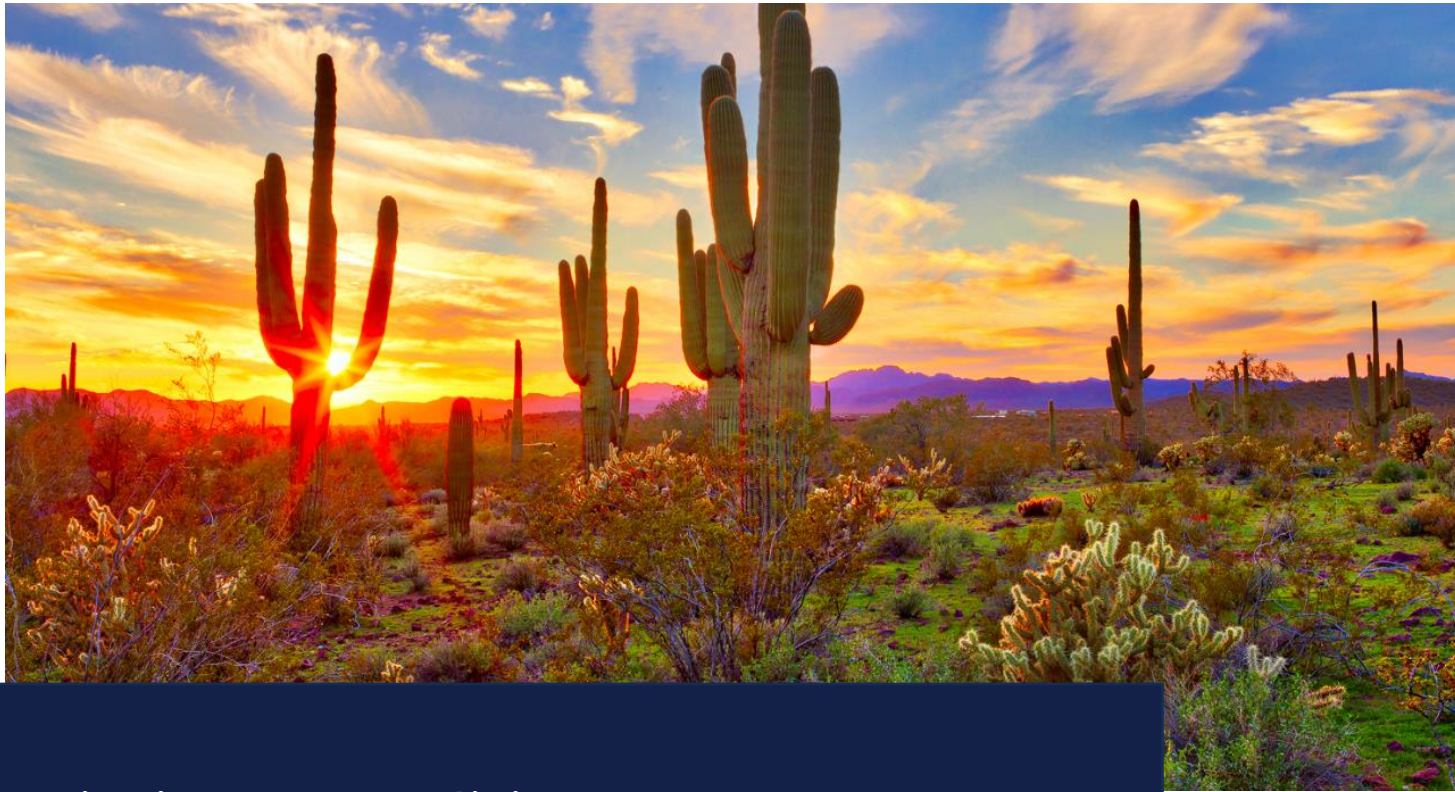


FEBRUARY 2025



Maricopa County
Comprehensive Plan



Existing Conditions 
BRIEF INSIGHTS

INTRODUCTION

Maricopa County is developing *Framework 2040* – an update to the Comprehensive Plan, the document that guides county decisions about land use, transportation, open space, jobs, housing, services, over the next decade and more through the year 2040.

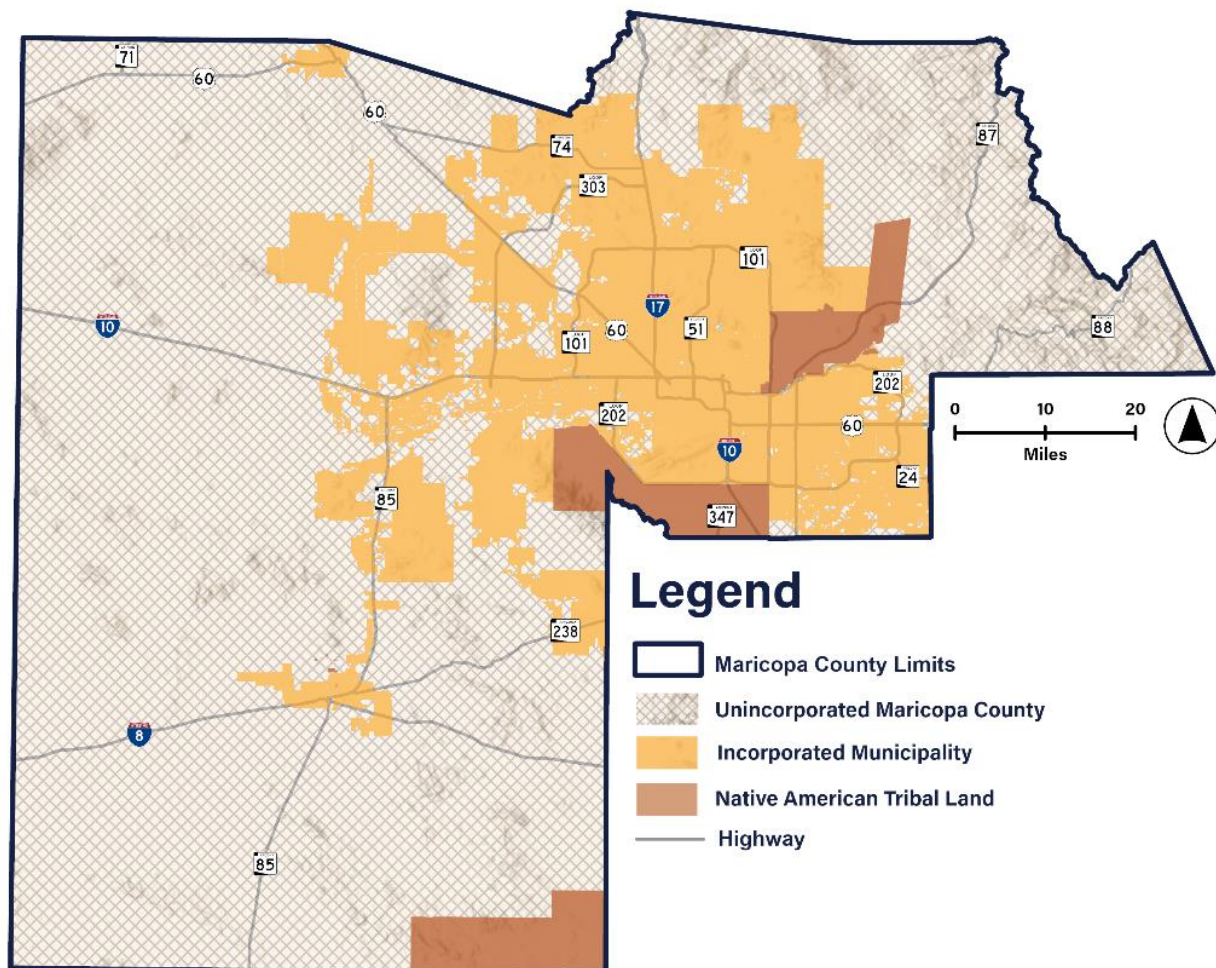
The **Existing Conditions – Brief Insights** offer a succinct snapshot of the broader conditions that exist in the county today and are provided to highlight select areas of multiple topics the county will consider as part of the Comprehensive Plan Update effort.



CONTEXT

Focusing on unincorporated Maricopa County. Overall, Maricopa County is comprised of “incorporated” land, which is land that is governed by a city or town or “unincorporated” land, which is land that is outside the jurisdictional boundaries of an incorporated city or town. This assessment focuses on Maricopa County’s unincorporated lands (i.e. area of jurisdiction) as shown in **Figure 1**.

Figure 1: Maricopa County Area of Jurisdiction



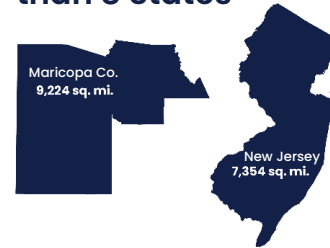
Source: Maricopa County Planning & Development

A BIG county by all measures. Maricopa County experienced significant population growth in recent decades, reflecting its status as one of the fastest-growing regions in the nation. In 1980, the US Census Bureau reported Maricopa County’s total population stood at over 1.5 million residents. Over the

4th
Most populous
county in the
country

subsequent decades, the county experienced significant growth, with the most rapid growth occurring between 1990 and 2010 as many areas witnessed transformative development. As of 2022, the US Census Bureau reported the county reached a total population of 4,430,871, making it the 4th largest county by population in the nation and home to more than half (62%) of Arizona's total population. By land area, Maricopa County is also the 15th largest county in the nation.

Land area greater than 8 States



GROWTH

Population growth has slowed compared to prior decades. Maricopa County's current unincorporated population is around 308,633 and has grown by more than 24,391 people between 2010 and 2022 alone as shown in **Table 1**. While growth is projected to significantly ease, in comparison to the prior decades, at an average annual rate of 1.92% through the 2020s, growth within unincorporated Maricopa County is anticipated to remain steady over the following decade, growing from a projected unincorporated population of 371,800 in 2030 to 478,500 in 2040 at an average annual rate of 2.55% as shown in **Figure 2**

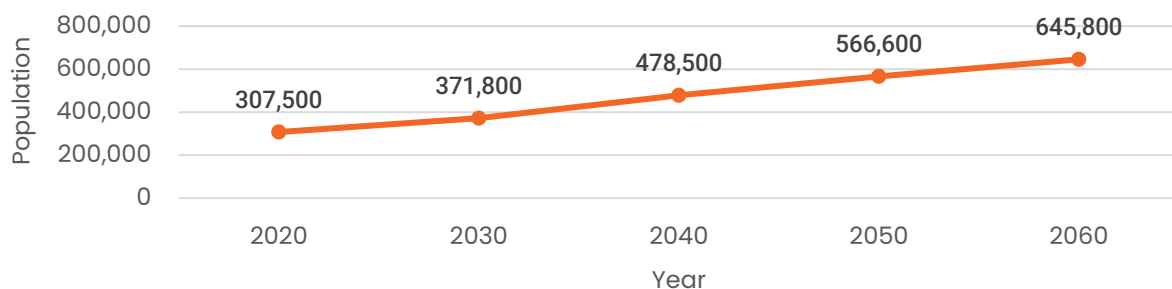
Figure 2.

Table 1: Maricopa County Incorporated and Unincorporated Population Growth by Decade

Year	Incorporated Area	Incorporated Area Growth Rate	Unincorporated Area	Unincorporated Area Growth Rate
1990	1,951,675		170,426	
2000	2,861,266	46.6%	210,883	23.7%
2010	3,532,875	23.5%	284,242	34.8%
2020	4,113,029	16.4%	307,539	8.2%
2022	4,122,238	0.2%	308,633	0.4%

Source: U.S. Census Bureau Decennial Census 1990, 2000, 2010, and 2020 & 2022 ACS 5-Year Estimates

Figure 2: Projected Maricopa County Unincorporated Population Growth by Decade



Source: Maricopa Association of Governments, 2023 Socioeconomic Projections

While population has increased, land area has decreased. Table 2 shows that since 2010, the county has lost 42,003 acres (approximately 66 square miles) of unincorporated land to annexation into incorporated cities and towns across the valley. This reduction in land area, coupled with population growth, has caused the population density within unincorporated Maricopa County to increase from an average of 43 persons per square mile in 2010 to almost 47 persons per square mile in 2022.

Table 2: Annexations of Unincorporated Maricopa County and Population Density

Year	Population	Unincorporated Area (sq. mi.)	Population Density (per/sq. mi.)
2010	284,242	6,662.16	43 people/sq. mi.
(Municipal Annexations)	-	65.63	-
2022	308,633	6,596.53	47 people/sq. mi.

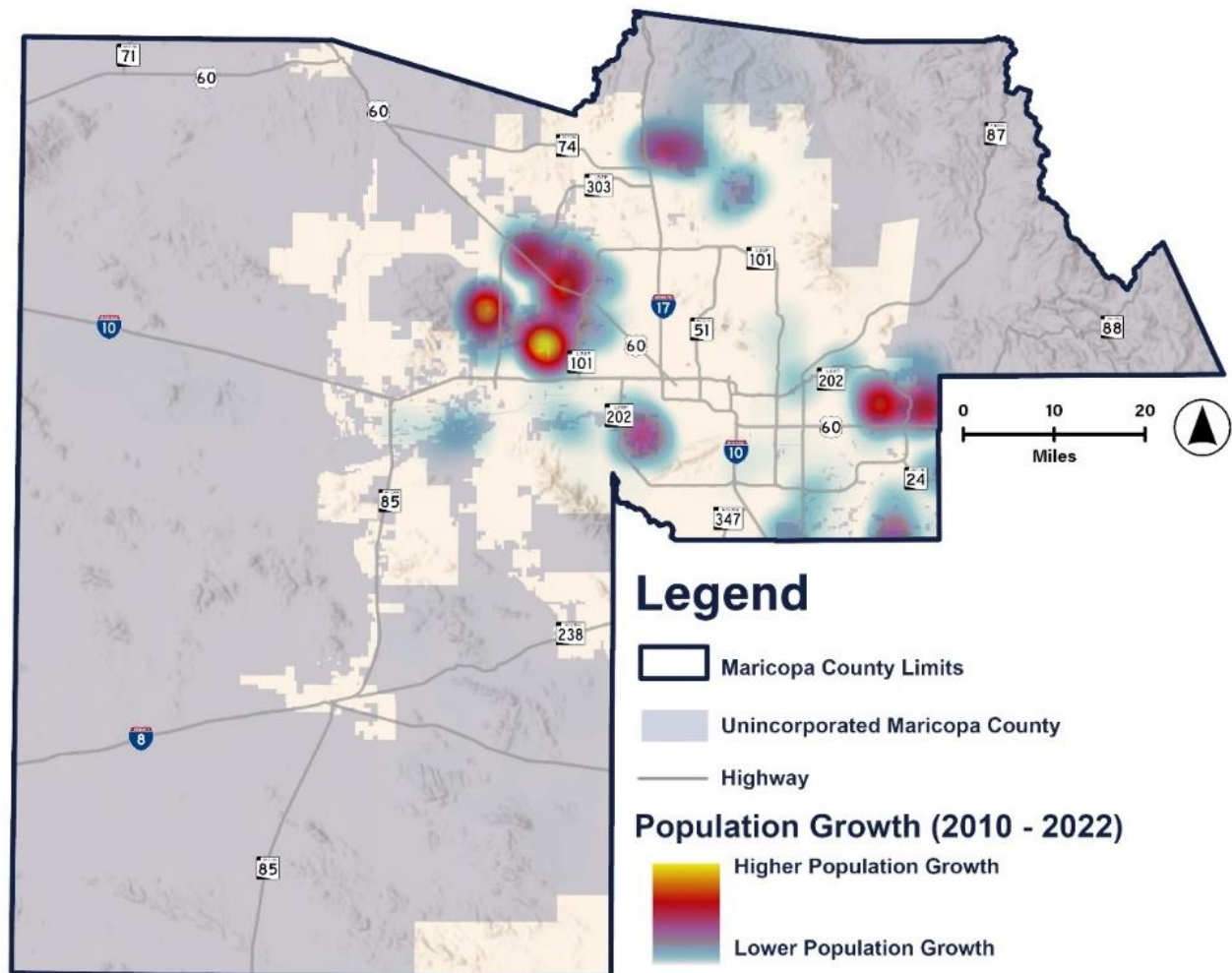
Source: U.S. Census Bureau Decennial Census 2010 & 2022 American Community Survey 5-Year Estimates



that occurred in unincorporated Maricopa County was focused in the eastern and northern parts of the county. When comparing the change in population in unincorporated Maricopa County from 2010 to 2022, the areas that experienced the highest rate of growth have shifted and are now predominantly located in the west valley as exhibited in **Figure 3**.

Maricopa County's unincorporated population is expected to grow by 169,867 people, or 55 percent, through 2040. As Maricopa County plans for this projected growth over the coming decade, it is anticipated that these current growth areas will continue to develop, while other growth areas will emerge as new development takes place in currently undeveloped areas. However, it is also recognized that while some areas of the county should be planned for this new development, other areas should be preserved or protected or see little new development.

Figure 3: Growth Trends in Unincorporated Maricopa County



Source: U.S. Census Bureau 2010 American Community Survey 5-Year Estimates; 2022 American Community Survey 5-Year Estimates

DEMOGRAPHICS & SOCIOECONOMICS

Generational changes influence community habits and needs. Examining the composition of growth in unincorporated Maricopa County in **Table 3** shows the percent of the population that is comprised of the Baby Boomer generation (born 1946 to 1964) and Millennial generation (born 1980 to 1994) grew by 7% and 4% respectively from 2010 to 2022. The Alpha generation (born 2010 to 2024) also emerged over this period and consists of approximately 14% of the unincorporated population in Maricopa County.

The generational composition of the county significantly impacts community habits and needs by driving demand for more focused services like healthcare, transportation, housing, social activities, and recreation choices, while also potentially changing the overall pace and character of an area due to residents with different priorities and lifestyle choices.

Table 3: Growth of Population by Generations in Unincorporated Maricopa County

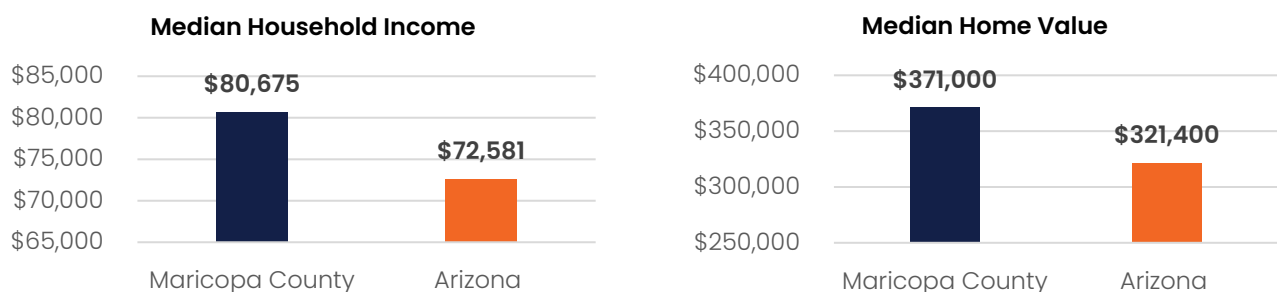
Generation	Percent of Population (2010)	Percent of Population (2022)
Greatest Generation & Silent Generation (born 1945/earlier)	31%	17%
Baby Boomer (born 1946 to 1964)	25%	32%
Gen X (born 1965 to 1979)	15%	11%
Millennial (born 1980 to 1994)	10%	14%
Gen Z (born 1995 to 2009)	15%	13%
Alpha (born 2010 - 2024)	N/A	14%

Source: U.S. Census Bureau Decennial Census 2010 & 2022 American Community Survey 5-Year Estimates

Household income has not kept pace with home value. Maricopa County's median household income is \$80,675, which is higher when compared to the State median income of \$72,581. Meanwhile, the median home value in Maricopa County is \$371,000, higher than the State median home value at \$321,400. Both of these facts are shown in **Figure 4**.

This condition establishes a price-to-income ratio of 4.6. Financial experts suggest buyers spend no more than 2.6x their annual income on a home. However, the national house-price-to-income ratio has been higher than the recommended 2.6 every year since 1985. This reality suggests that first time homebuyers will need to surmount a much higher hurdle to achieve homeownership in the future.

Figure 4: Median Household Income and Home Value in Unincorporated Maricopa County and Arizona



Source: U.S. Census Bureau 2022 American Community Survey 5-Year Estimates

Cost-burdened households are significant. Cost-burdened households are households paying 30% or more, and severely cost-burden households are households paying 50% or more of their household income on housing costs, whether mortgage or rent. **Figure 5** shows that across Maricopa County (including unincorporated and incorporated areas), approximately 499,668 households are cost-burdened, which reflects 30% of all households, while 14% of all households are spending half or more of their income on housing expenses.

Figure 5: Percentage of Maricopa County Cost-Burdened Households



Source: U.S. Census Bureau 2022 American Community Survey 5-Year Estimates

County residents are more educated. When comparing educational attainment levels for individuals aged 25 years and older between 2010 and 2022, there were notable increases in higher education levels. The proportion of high school graduates rose from 21% to 26%, while those with some college education but no degree increased from 20% to 27%. Additionally, the percentage of individuals holding an associate's degree grew from 6% to 10%, and those with a bachelor's degree increased from 12% to 18%. The most significant growth was seen in the category of graduate or professional degrees, which rose from 6% to 11%.

Overall, **Table 4** illustrates a significant upward trend in across educational attainment over the identified 12-year period. The trend is encouraging given that higher overall educational attainment greatly contributes to attracting leading industry, which supports the growth of more advanced and diverse employment opportunities. This is a key contributor to fostering an economic environment in Maricopa County that is more resilient to external factors.

Table 4: Educational Attainment Percentage Growth in Unincorporated Maricopa County

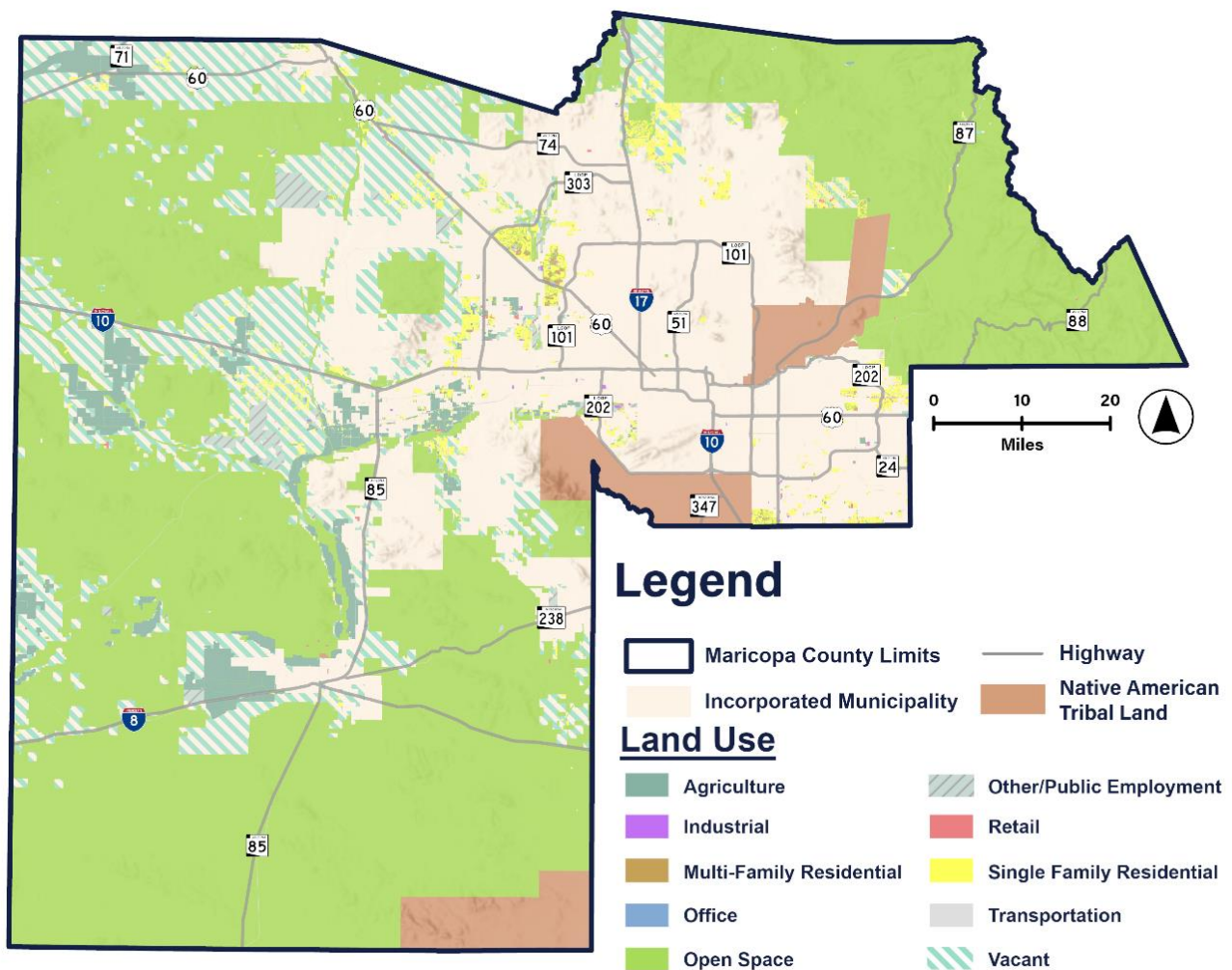
25 years and Older	2010	2022	Percent Change
Less than 9th grade	3%	3%	-
9th to 12th grade, no diploma	5%	5%	-
High school graduate (includes equivalency)	21%	26%	+5%
Some college, no degree	20%	27%	+7%
Associate's degree	6%	10%	+4%
Bachelor's degree	12%	18%	+6%
Graduate or professional degree	6%	11%	+5%

Source: U.S. Census Bureau 2010 Decennial Census and 2022 American Community Survey 5-Year Estimates

LAND USE

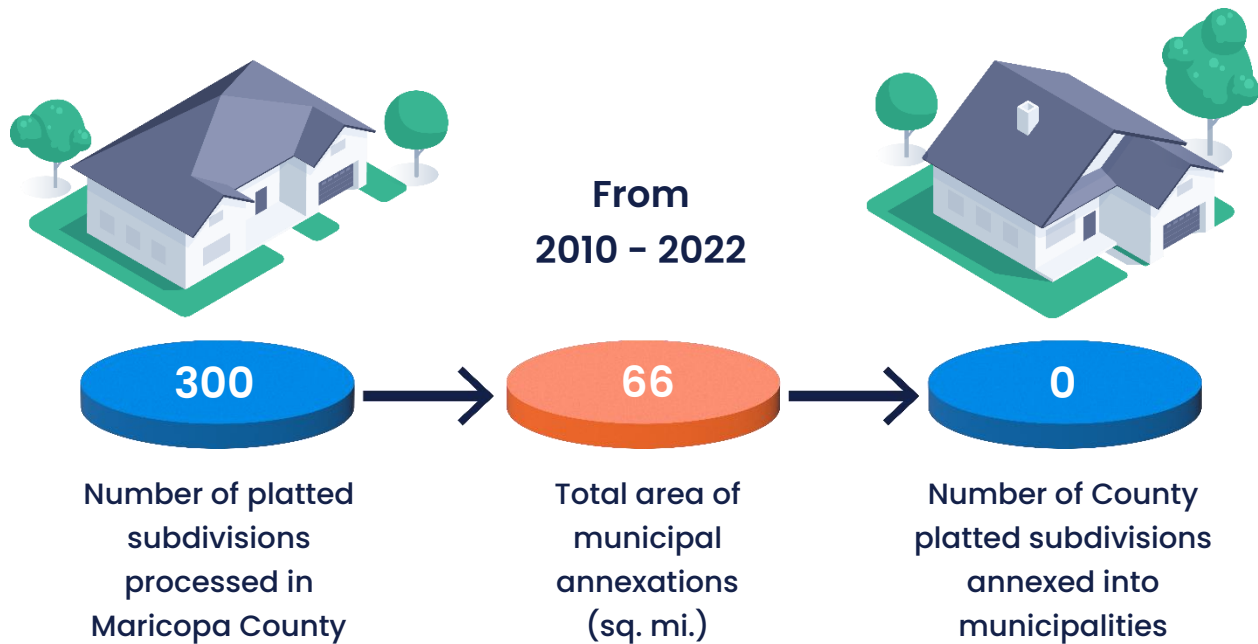
A rural county with urban pressures. Figure 6 shows that roughly 74% of Maricopa County's total land area is dedicated to open space. This is understandable given that there are large areas of the County that are under varying governmental ownership (federal, state, and local) currently managed or preserved as open space. These areas include Tonto National Forest, Barry M. Goldwater Air Force Range, BLM land holdings, State Trust Land, and County. Another 4.2% of existing land uses are dedicated to agriculture production. Combined, open space and agriculture land amounts to over 78% of the land area in Maricopa County. However, Maricopa County's land use patterns have evolved over time as municipalities have grown and matured and as market preferences for residential and non-residential development has changed. Together, single-family residential, multi-family residential, retail, office, industrial, and quasi-public uses only amount to 3.85% of the county's total land area. Vacant land available for development accounts for 17.5% of all land in the county.

Figure 6: Existing Land Uses



Source: Maricopa Association of Governments, 2022

County subdivisions tend to stay county subdivisions. Since 2010, the total unincorporated land in Maricopa County that was annexed equaled 42,003 acres. Interestingly, all the subdivisions that were platted within these annexation acres were subdivided after annexation (i.e. they were subdivided once incorporated). Relatedly, none of the developments subdivided in the county over this same period were annexed.

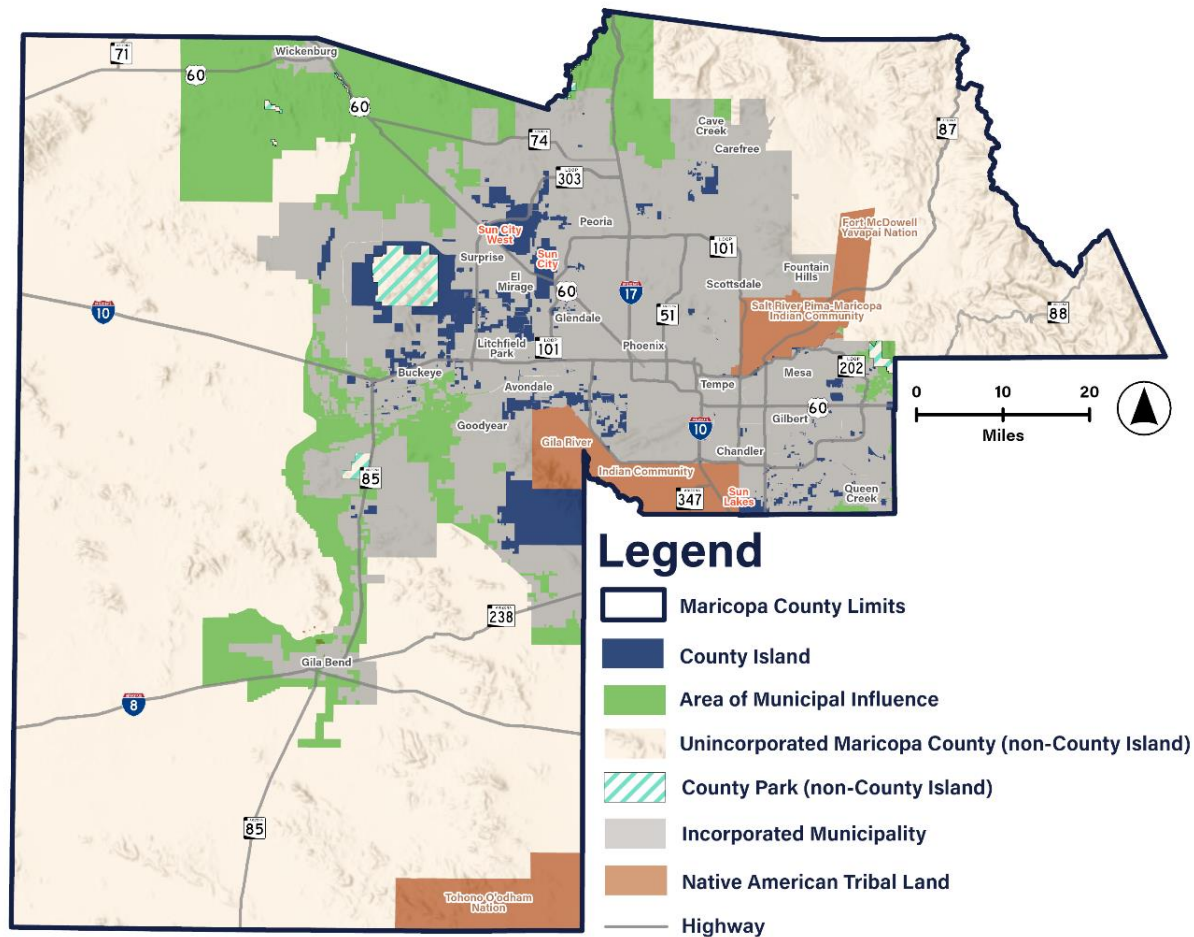


County Islands create complex development conditions. County Islands are areas of unincorporated Maricopa County that are surrounded on all sides by an incorporated municipality or Native American jurisdictions. **Figure 7** identifies the total unincorporated land that is captured within county islands (487,717 acres). Some of the largest county islands include urbanized communities of Sun City and Sun City West, but the majority of county islands that exist within the various municipalities located throughout Maricopa County are smaller in size. In fact, there are a total of 276 county islands that range between 1-160 acres in size.

Moreover, there are also unincorporated areas of “municipal influence” to consider. These areas of municipal influence are comprised of unincorporated lands that are not county islands (as defined above) but do exist within the currently defined municipal planning areas (MPAs) of the various incorporated cities and towns located within the county. Thus, while these municipal influence areas are not surrounded on all sides by incorporated or Native American jurisdictions, it is anticipated that these areas will be annexed into their associated municipalities at some time in the future. **Figure 7** calls out the total unincorporated land in the county’s areas of municipal influence (693,416 acres).

The majority of county islands are developed or partially developed in a manner that is more consistent with county development standards rather than the development standards of the municipalities that surround them. These include roadway improvements, stormwater improvements and utility infrastructure upgrades. Varying conditions among the county islands present unique challenges for urban planning and service provision. Consequently, as cities and towns grow and develop in Maricopa County, integration of county islands can be complex and contentious.

Figure 7: County Islands and Areas of Municipal Influence



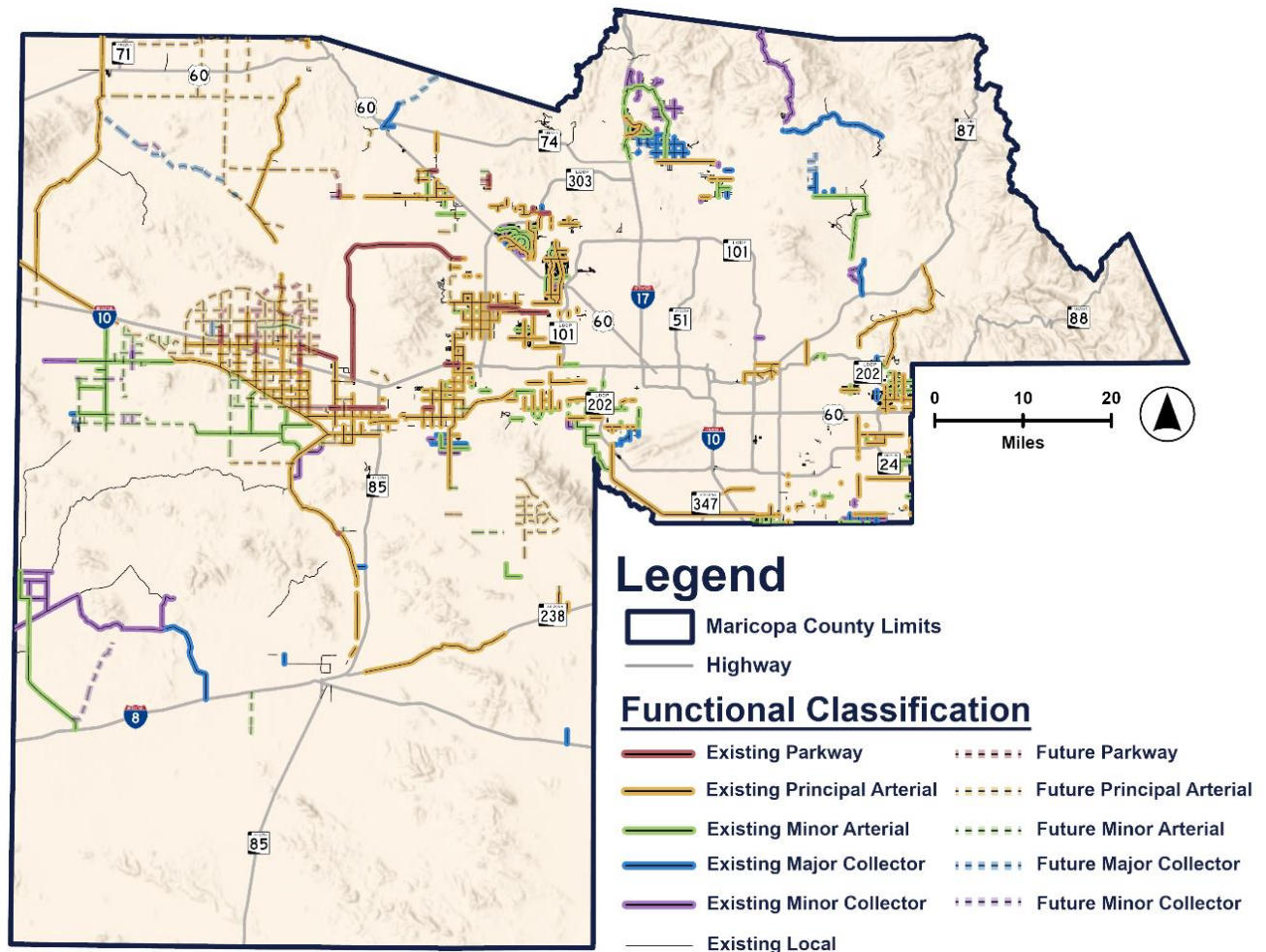
Source: Maricopa County Planning & Development

The total number of farms have steadily decreased in Maricopa County over the last decade; however, the total acres of farms has grown. According to the Census of Agriculture from the U.S. Department of Agriculture (USDA), the number of farms in Maricopa County decreased over the last ten years, shrinking from 2,479 in 2012 to 1,874 in 2017 and down to 1,527 in 2022. Although, as the number of farms shrank, Maricopa County reported more acres devoted to farming in 2022 (502,029) than in 2017 (474,438 acres). The largest increases of agricultural acreage in Maricopa County from 2017 to 2022 are due to additional acreage for higher numbers of cattle in the county raised for beef production and, along with this, more agricultural acreage for corn and wheat harvesting for the purposes of cattle feed.

TRANSPORTATION

A system designed to meet user needs. Maricopa County has 2,476 miles of roadway, 1,271 miles of sidewalk, 109 miles of bike lanes, and 119 bus stops. **Figure 8** shows the total Maricopa County Department of Transportation (MCDOT) existing and future functional classification as found in the MCDOT Transportation Systems Plan (TSP) 2018. Since 2010, there has been a total of 10 miles of new freeway frontage constructed within unincorporated Maricopa County.

Figure 8: MCDOT Functional Classification (Existing and Future)

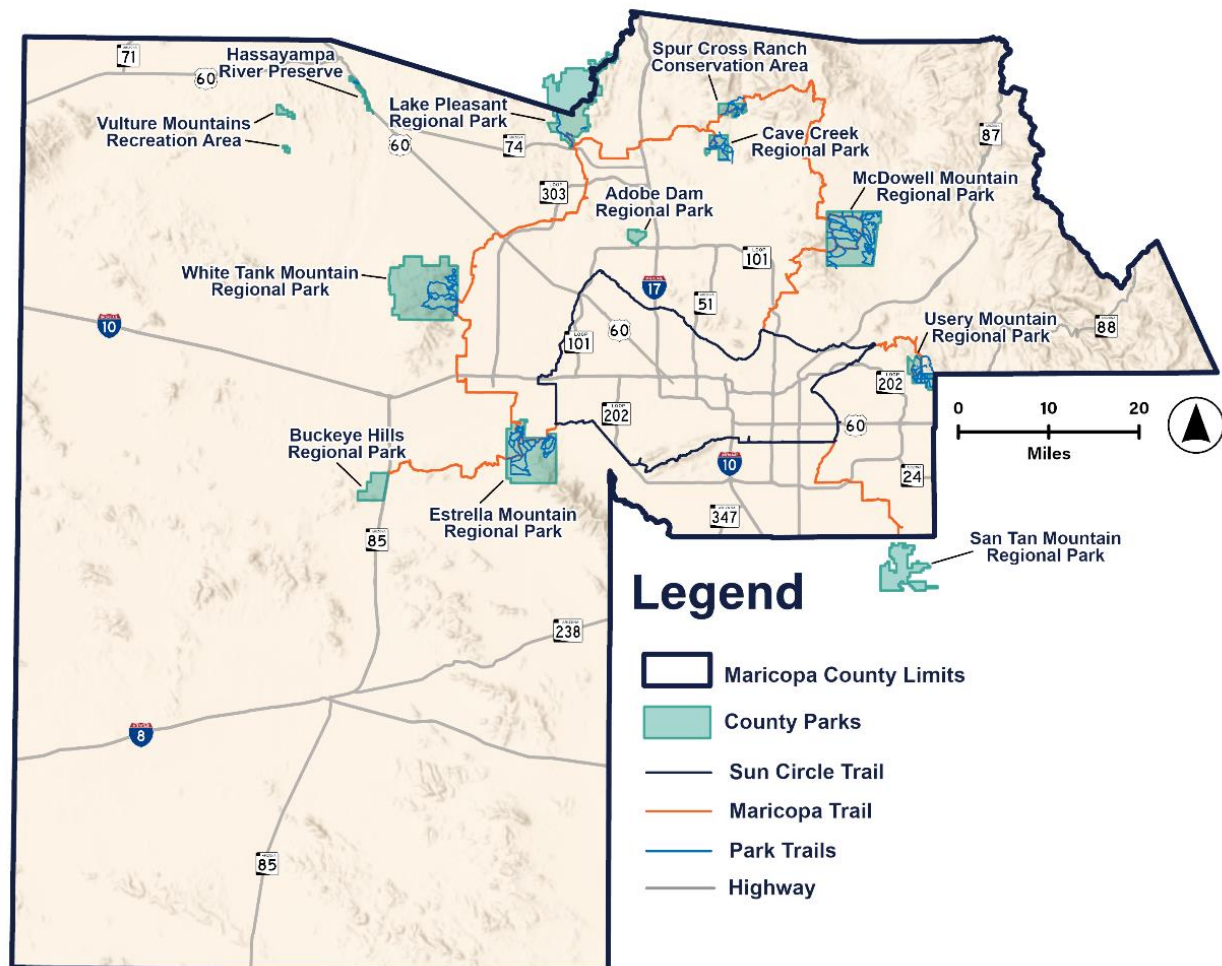


Source: Maricopa County Department of Transportation TSP 2040

OPEN SPACE/TRAILS

Upholding open space and trails as a priority. The Maricopa County Parks and Recreation Department operates one of the largest regional park systems in the United States, encompassing over 120,000 acres of open space. This extensive network includes 14 regional parks and preserves as well as over 1,521 miles of regional trails. The County Parks and Trails System are shown in **Figure 9**.

Figure 9: County Parks and Trails



Source: Maricopa County Parks & Recreation

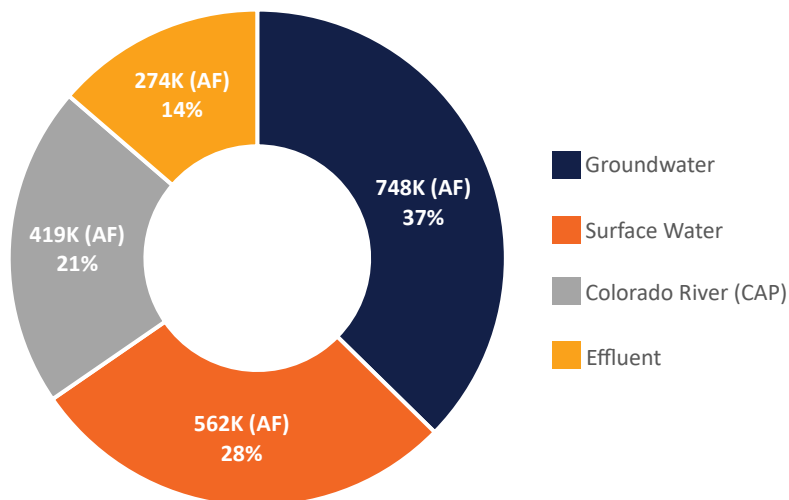
WATER

Water comes from many sources. Maricopa County is predominantly located within the Phoenix Active Management Area (AMA). While the state-established AMAs provide enhanced groundwater protection, the Phoenix AMA actually utilizes several sources of water including: groundwater, surface water, effluent, and Colorado River water delivered through Central Arizona Project (CAP) infrastructure.

The primary source of water in the Phoenix AMA is groundwater at 748K acre-feet (AF) annually. Surface water is the second largest source for water in the Phoenix AMA at 562K AF annually. The Colorado River/Central Arizona Project (CAP) is the third largest source for water in the county at 419K AF annually. Effluent or reclaimed water is the smallest source of water in the Phoenix AMA at 274K AF annually. **Figure 10** illustrates the percentage split of the sources of water in the Phoenix AMA.

Maricopa County is not a designated water provider. Currently within the Phoenix AMA, there are 42 large water providers and 51 small water providers (Phoenix Management Plan – 5th Management Plan). Users within unincorporated Maricopa County obtain water delivery from one of these water providers or through groundwater pumping via grandfather rights, withdrawal permits, or exempt wells.

Figure 10: Source of Water in Phoenix AMA



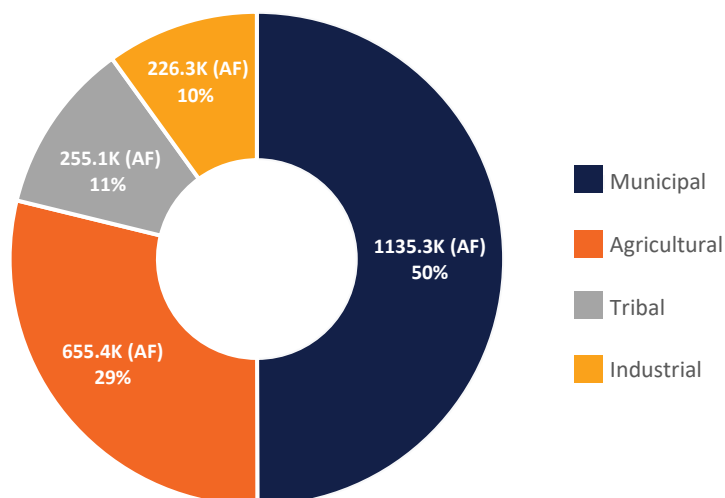
Source: Phoenix Active Management Area – 5th Management Plan 2020–2025

As development expands into farmland, the demand for water is moving away from agriculture production towards more urban uses. Until 1999, more water was used in the Phoenix AMA for agriculture than for cities. Since that time, water demand has gradually shifted to where in 2019, agriculture accounted for only 29% of the Phoenix AMA overall water use, while municipal use accounted for 50% and industrial use accounted for an additional 10%. **Figure 11** shows this percentage split of the water use in the Phoenix AMA.

Even though the distribution of overall water use in the Phoenix AMA has been fairly consistent for several years, the Drought Contingency Plan (DCP) is in place to mitigate the impacts of shortages on the Colorado River as drought conditions have persisted in the southwest. Under the DCP, low water levels in Lake Mead have triggered (for the first time) reduced CAP deliveries to agricultural users in Maricopa, Pima, and Pinal Counties. Consequently, it is anticipated that Maricopa County water users will likely see additional, sustained reductions in CAP supplies in the near-term.

Furthermore, given that certain areas within the Phoenix AMA continue to experience water level declines from groundwater pumping, the state also initiated a moratorium on the issuance of permits for proposed subdivisions that are not served by a designated water provider and would rely on local groundwater as a primary water source. In response to these restrictions, transporting additional groundwater to the Phoenix AMA from the Harquahala Irrigation Non-Expansion Area (INA) Basin has become a realistically considered possibility over the near-term period to areas in the Phoenix AMA if needed.

Figure 11: Water Demand by Sector in Phoenix AMA

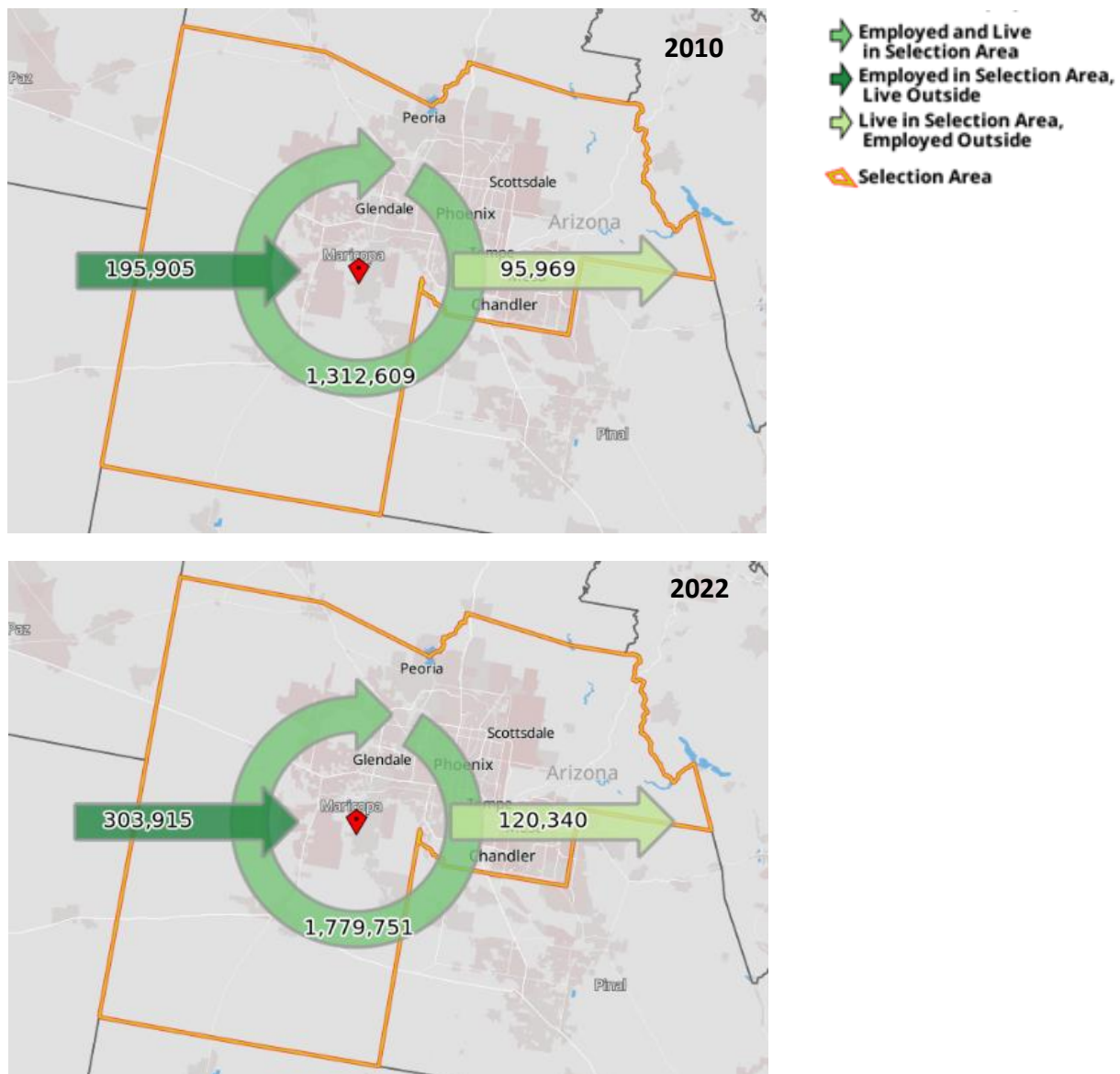


Source: Phoenix Active Management Area – 5th Management Plan 2020–2025

ECONOMY

The imbalance of worker commute flows suggests a strong attraction of labor to Maricopa County. Between 2010 and 2022, the number of people who live and work in Maricopa County grew by 467,142 (36%), while those who work in Maricopa County but live elsewhere grew by 108,010 (55%) as exhibited in **Figure 12**. Conversely, the number of people living in Maricopa County and working elsewhere only increased by 24,371 (25%). Given most workers across all income brackets work within the County, this suggests a strong local job market within Maricopa County. In addition, given workers are driving further distances to reach employment within Maricopa County, this demonstrates the County's importance as a central economic driver, but also may be an indicator that workers are having to or are willing to drive further distances to access housing.

Figure 12: Worker Commute Inflow/Outflow Analysis



Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics 2010/2022, Inflow Outflow Analysis

Workforce employment is distributed across many industries. Nearly a fifth (19%) of unincorporated Maricopa County's workforce is employed in the Educational Services, Health Care and Social Assistance industry, followed by Retail Trade (12%) and Professional, Scientific, Management, and Administrative and Waste Management Services (12%). Construction; Finance and Insurance, Real Estate, Rental and Leasing; and Arts, Entertainment, Recreation, Accommodation, and Food Services round off the next three largest industries accounting for another 27% collectively of workforce industries. **Figure 13** displays a more complete picture of the workforce distribution by industry in Maricopa County.

Figure 13: Workforce Distribution by Industry



Source: U.S. Census Bureau 2022 American Community Survey 5-Year Estimates



Sonoran Desert National Monument