



# PRELIMINARY DRAFT

## COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)



Submitted by:

**Colorado River Region (La Paz and Yuma Counties, Arizona)**

---

**SUBMITTED TO:**

**U.S. Department of Commerce**

**Economic Development Administration**

**April 11, 2025**

**Contents**

- 1. Introduction .....1**
- 2. Executive Summary.....4**
- 3. SWOT Analysis.....7**
- 4. Regional Demographic and Economic Summary.....10**
- 5. Target Industries and Business Attraction Incentives.....15**
- 6. Important (“Game Changer”) Initiatives in the Region.....21**
- 7. Strategic Direction / Action Plan.....23**
- 8. Economic Resilience.....31**
- 9. Evaluation Framework .....37**
- 10. Candidate CEDS Projects .....40**
- Appendix A: Census Data (Qualifying Census Tracts) .....41**
- Appendix B: Employment Trends by Major Industry.....46**
- Appendix C: Additional Data Resources .....57**

## 1. Introduction

This document provides a five-year Comprehensive Economic Development Strategy (CEDS) for the Colorado River Region (CRR) of Arizona. It is organized as a regional CEDS covering two counties (La Paz and Yuma) and participating constituent jurisdictions. As described later in the CEDS, each of the local jurisdictions (i.e., cities) has unique niches in the CRR economy and different areas of strategic focus for economic development. The CEDS is not intended to replace their individual economic development programs. It is instead designed to strengthen local initiatives while providing a framework for enhanced collaboration on development issues of regional significance. In this regard, the CEDS creates a framework for delivery of community-level economic development in tandem with the regional initiatives which are the primary focus of the CEDS Action Plan.

### Key Themes Addressed in this CEDS

The CEDS Action Plan is designed to leverage the CRR's existing and emerging economic strengths, while systematically addressing current and longstanding challenges to the region's prosperity. During the course of the CEDS planning process, the following key themes emerged as significant drivers of the strategic vision outlined in the CEDS:

- Maximizing “next level” opportunities related to the region’s longstanding mainstay industries (agriculture, tourism, international trade, and defense-related activities);
- Expanding the region’s leadership in the renewable energy cluster;
- Connecting the presence of military/defense installations in Yuma County (and adjacent Imperial County, Arizona) to expand R&D and manufacturing investment in targeted industries such as aerospace;
- Aggressively pursuing a proposed spaceport in Yuma County, which stands to be fundamental economic “game changer” for the overall region;
- Capitalizing on the region’s established status as a destination for both domestic and bi-national visitation and recreation; and
- Leveraging the region’s strategic location within the Arizona-California-Mexico border region, which supports tremendous opportunities for international trade, “onshoring” of manufacturing, and border-related tourism.

### Economic Resilience and the CEDS

This CEDS aligns with the Economic Development Administration’s longstanding focus on building resiliency in local and regional economies. In addition to including a specific series of action items under the goal labeled “Expand the region’s economic resilience,” the overall CEDS reflects a complete spectrum of strategic themes that relate directly to the concept of economic resiliency. These themes include:

- Diversification of the region’s industry/employment base (including growing opportunities for international trade and foreign direct investment);
- Focus on strengthening existing and emerging industry clusters;

- Focus on retention/expansion of existing businesses;
- Creating a business environment conducive to entrepreneurial and small business development;
- Infrastructure investments that leverage local, state and federal funding;
- Integration of economic development programming with broader planning, land use and environmental initiatives; and
- Improving the fiscal wherewithal of local governments.

## Evaluation Framework

The CEDS Action Plan includes a set of performance measures that will be utilized to evaluate implementation of the CEDS and its impact on the regional economy. The chosen performance measures focus on metrics that can be readily tracked over time (and compared across different geographies and jurisdictions). The focus on commonly available data sources (including the Census Bureau, Bureau of Labor Statistics, and various State sources) is intended to facilitate the preparation of Annual Performance Reports in future years.

## CEDS Committee

Preparation of this CEDS was guided by the following Strategy Committee:

| Name (Title)  | Affiliation                                   |
|---|---|
| Moises Pimentel (Regional Project Manager, College and Career Pathways, Southwest Arizona)    | The Center for the Future of Arizona (CFA)    |
| Armando Esparza (Director of Economic Development and Government & Foreign Affairs)           | City of San Luis                              |
| Jazmin Zamudio (Economic Development Director)  | City of Somerton                              |
| Chris Mazzarella (Project Manager)  | City of Tucson                                |
| Cynthia Blot (Economic Development Manager)<br>Madeleine Coil (Grants Administrator)          | City of Yuma                                  |
| Cory Madoneczky (Economic Development Manager)  | County of La Paz                              |
| Alejandro Figueroa (Economic Development & Intergovernmental Affairs Administrative Director) | County of Yuma                                |
| Amber Shek (Chief Operations Officer)<br>Mariana Apperson (Data Exploration Specialist)       | Greater Yuma Economic Development Corporation |
| Julie Engel (Business Development Specialist)   | Onvida  |
| Richard Marsh (Town Administrator)  | Town of Wellton                               |

## Summary of Public Participation/Input

Preparation of this CEDS included the following public/stakeholder participation:

### CEDS Strategy Committee

The CEDS Strategy Committee met four times during the CEDS preparation process:

- May 13, 2024 (project orientation)
- August 13, 2024 (preliminary discussion of SWOT issues)
- October 15, 2024 (additional discussion of SWOT issues, preliminary discussion of target industries)
- December 10, 2024 (final review of SWOT summary, review of preliminary outline of CEDS Action Plan, prioritization of target industries)
- January 22, 2025 (guidance of process for nominating projects for inclusion in CEDS)
- [DATE] (approval of draft CEDS)

In addition to the above meetings, the Strategy Committee had the opportunity to provide input via two online surveys:

- Survey on target industries and strategic priorities for the CEDS
- Online nomination form for “candidate” CEDS projects

The Strategy Committee’s input is synthesized in the following sections of the CEDS:

- SWOT summary (Chapter 3)
- Identification of high-priority industry clusters (Chapter 5)
- Identification of major “game changer” initiatives (Chapter 6)
- Action Plan (Chapter 7)
- Candidate CEDS Projects (Chapter 10)

### General Public

The draft CEDS was widely circulated and available online for public comment between April 15, 2025 and May 15, 2025.

The CEDS was approved by the La Paz County Board of Supervisors on [DATE], during a public meeting which provided opportunities for public comment.

The CEDS was approved by the Yuma County Board of Supervisors on [DATE], during a public meeting which provided opportunities for public comment.

## 2. Executive Summary

### **CEDS Action Plan Goals and Strategies**

The CEDS Action Plan, detailed in Chapter 7, is organized around seven major goals and associated strategies:

**Goal 1 – Create high-paying employment opportunities through robust business retention/expansion/attraction programming focused on the region’s core industry clusters**

**Strategy 1A: Launch business attraction campaign for the two-county region**

**Strategy 1B: Expand business retention/expansion (BRE) outreach and strengthen business assistance resources (focusing on firms in high-priority, regionally significant industry clusters)**

**Strategy 1C: Develop regional business attraction incentives to supplement local (city, county) offerings**

**Strategy 1D: Develop priorities and action plan to improve the region’s business friendliness and development capacity**

**Goal 2 – Attract innovation investment and strengthen business startup ecosystem through “game-changing” initiatives currently being launched in the region**

**Strategy 2A: Aggressively secure resources and initiate implementation of the Yuma Spaceport concept; in addition to potentially driving innovation and economic growth, this initiative will also be a way to rally stakeholders around an aggressive but potentially influential common cause, and in the process help secure support for related and other initiatives**

**Strategy 2B: Focus regional resources and political support around the Elevate Southwest initiative**

**Strategy 2C: Establish regional entrepreneurial development consortium to provide “one stop” point of access to business startup resources offered by partner organizations**

**Goal 3 – Promote the region as a destination for sustainable tourism (including agritourism) and outdoor recreation (this goal is closely related to Goal 6, which is intended to demonstrate that the region is more complex/attractive than might be commonly perceived)**

**Strategy 3A: Launch regional marketing and branding initiative to promote “Arizona’s Colorado River Region” as destination**

**Strategy 3B: As part of business attraction initiative (Strategy 1A), target attraction of major visitor-serving facilities (e.g., hotels, sports venues, etc.)**

Strategy 3C: Establish regional (two-county) tourism consortium to identify shared market opportunities and prioritize investment in visitor amenities that are regional in scale and impact

**Goal 4 – Leverage region’s educational institutions and workforce development resources to maximize connection between resident workforce and emerging job opportunities**

Strategy 4A: Coordinate on an annual basis (or more frequently as needed) with county-level Workforce Development Boards and educational institutions to ensure capacity and prioritization of training programs relevant to needs of targeted/emerging industries

Strategy 4B: Leverage partnerships with organizations/initiatives (e.g., Elevate Southwest) that can serve as conduits between firms in high-priority industries and workforce development resources

**Goal 5 – Prioritize investments in infrastructure critical to the growth of targeted industry clusters**

Strategy 5A: Convene CEDS Strategy Committee twice annually to identify and prioritize needed regional infrastructure investments

Strategy 5B: Coordinate with local jurisdictions (cities and counties) to update list of “candidate” CEDS projects

**Goal 6 – Enhance region’s overall image as a high-quality place to live, work, play, and invest**

Strategy 6A: Launch regional (two-county) marketing campaign aimed at raising national awareness and improving external perceptions of the region

Strategy 6B: Facilitate placemaking investments and other high-profile “quality of place” initiatives

**Goal 7 – Expand the region’s economic resilience**

Strategy 7A: Prepare annual memorandum report demonstrating the relationship between implementation actions and resilience issues

## High-Priority Industry Clusters Identified by CEDS Strategy Committee

The CEDS Action Plan is organized around the following high-priority industry clusters (and related economic development initiatives) selected by the CEDS Strategy Committee:

- Clean tech manufacturing
- Ag tech
- Manufacturing (including reshoring opportunities))
- Healthcare
- Logistics/distribution
- Spaceport and related business opportunities
- Tourism / winter visitors
- Alignment with the following State of Arizona economic development priorities: Aerospace, Bioscience/Healthcare, Business/Financial Services, Film/Digital Media, Manufacturing and Innovation



### 3. SWOT Analysis

During the course of the CEDS planning process, the following Strengths, Weaknesses, Opportunities and Threats relative to region’s economic potentials have been identified:

|                          |   |
|--------------------------|---|
| <p><b>STRENGTHS</b></p>  | <ul style="list-style-type: none"> <li>• Geographical location</li> <li>• Weather</li> <li>• Cost of doing business</li> <li>• Connectivity (infrastructure/broadband/2 ports/industrial park)</li> <li>• CTE (career pathways)</li> <li>• Highest graduation rate in the state</li> <li>• Diverse industry base</li> <li>• AWC/employer/industry needs</li> <li>• Ag economy-global connection</li> <li>• Military</li> <li>• 3 universities</li> <li>• YCEDA</li> <li>• Culture of collaboration (can convene quickly)</li> <li>• Workforce size</li> <li>• Quality of life / cost of living</li> <li>• Happy people (CFA stats)</li> <li>• Historical significance/heritage</li> <li>• Binational/bilingual</li> <li>• Diversity</li> <li>• Young (median age)</li> <li>• Growing community</li> <li>• San Luis fastest growing city</li> <li>• Safety</li> <li>• Economic growth</li> <li>• Healthcare</li> <li>• Winter visitors</li> <li>• Airspace</li> <li>• Foreign Trade Zone</li> <li>• Tourism</li> <li>• Strong “position” in terms of water rights and availability</li> <li>• Region is proactive and engaged as it relates to long-range city/community planning</li> <li>• Yuma and La Paz Counties complement each other – they do not “overlap” (in terms of competing/conflicting interests)</li> </ul> |
| <p><b>WEAKNESSES</b></p> | <ul style="list-style-type: none"> <li>• Skilled workforce</li> <li>• Unemployment rate</li> </ul>  |

|                      |  |
|----------------------|--|
|                      | <ul style="list-style-type: none"> <li>• “Rural” image limits outside perceptions of economic attractiveness</li> <li>• Jobs/gaps</li> <li>• Most jobs are in healthcare/retail/hospitality</li> <li>• Access to specialty healthcare is limited</li> <li>• Image of Yuma County (immigration issues, etc.)</li> <li>• Resources/water (national perception/message that Arizona has limited water supply, which is different from local understanding of Yuma’s water rights)</li> <li>• Winter visitors (seasonal impacts)</li> <li>• High percentages of residents who are not in school or working (compared to statewide trend)</li> <li>• Opportunity Youth<sup>1</sup> stats (22%/27% compared to state benchmark of 12%)</li> <li>• Limited access to capital for business startups or scale-ups</li> <li>• Limited supply of built (ready-to-occupy) industrial buildings; this problem is in part tied to the lack of access to capital</li> <li>• Marketing strategy (for industry attraction) needs a stronger “sense of place”</li> </ul> |
| <b>OPPORTUNITIES</b> | <ul style="list-style-type: none"> <li>• Proposed Spaceport (see Chapter 6 for description)</li> <li>• Higher education</li> <li>• Clean energy</li> <li>• YRMC training center</li> <li>• Elevate Southwest Innovation Hub (See Chapter 6 for description)</li> <li>• Attract STEM</li> <li>• Attraction of younger residents</li> <li>• Branding</li> <li>• Workforce accelerator (initiative of Arizona Western College)</li> <li>• More funding (including major pending NSF grant)</li> <li>• Working as a Southwest region</li> <li>• Port of Entry expansion</li> <li>• Potential for onshoring or reshoring of manufacturing industries (especially in northern Mexico)</li> <li>• Border-related commercial/industrial development (e.g. San Luis industrial park)</li> <li>• Funding available through bi-partisan infrastructure bill</li> <li>• Cali-Baja megaregion and the related 4FrontED initiative</li> </ul>  |

---

<sup>1</sup> Defined as young people between the ages of 16 and 24 who are neither enrolled in school nor participating in the labor market.

## THREATS

- Agriculture/dependency
- Colorado River water rights
- Climate change
- Winter visitors
- Staffing at Port of Entry (200 agents/16 lanes)
- Legislation
- California waste (environmental impacts)
- Affordability, housing (costs rising)
- Fairgrounds (constrained reuse potentials)
- Groundwater/water rights
- Air quality PM10
- Growth in retirement population (there are insufficient resources to support the service demands created by an aging population)
- Military – the proximity of the fairgrounds to the military’s airspace (and the financial infeasibility of relocating the fairgrounds) and the military’s noise contour restrictions are significant development constraints
- Talent leakage (graduates of local colleges often leave the region to seek employment opportunities elsewhere)

## 4. Regional Demographic and Economic Summary

This section summarizes key findings from the compilation of demographic and economic data prepared for this CEDS. Other material is shown in Appendices A through C. Data are provided for La Paz County, Yuma County, the Colorado River Region (CRR), and the state of Arizona. Topics address current conditions related to economic characteristics, housing units, households/families, educational attainment, population projections, annual unemployment, jobs by industry, and annual border crossing traffic counts.

The demographic/economic data were obtained from the U.S. Census Bureau American Community Survey (ACS) 5-year estimates (2019-2023), the Arizona Office of Economic Opportunity Population Projections and annual unemployment rates, U.S. Census Bureau OnTheMap LEHD Origin-Destination Employment for 2022, and the U.S. Department of Transportation Border Crossing Entry Data.

The data indicate several challenges for the region in comparison to the State of Arizona's benchmarks. Although CCR's population is projected to grow 7.3% by 2030, the entire state of Arizona is projected to grow at a higher rate (10.9%) by 2030. In addition, the labor market within CRR also faces challenges, with La Paz County's labor force participation rate (42.9%) and unemployment rate (10.8%) lagging far behind Arizona (60.5% and 5.2%, respectively).

Key industries for the CRR resident workforce<sup>2</sup> include educational services, & health care & social assistance (20.3%), retail trade (10.6%), and agriculture, forestry, fishing and hunting, and mining (9.6%). The CRR's share of resident workers in the industries of agriculture, forestry, fishing and hunting, and mining is noticeably higher than Arizona (1.3%). In terms of jobs<sup>3</sup> within the region, the industries with the highest shares include health care and social assistance (14.4%), professional, scientific, and technical services (11.8%), retail trade (9.1%), educational services (9.1%), and manufacturing (8.8%), and are higher than Arizona's shares within these industries except for retail trade.

The average household income for the CCR (\$76,618) is noticeably lower than the state's average household income of \$104,138. Poverty rates are elevated, especially for female-headed households in La Paz County (36.7%) in comparison to the state (22.3%). Housing affordability within the region is also strained with 21.3% of the households with a mortgage spending more than 35% of their income on housing costs.

---

<sup>2</sup> The term "resident workforce" refers to resident workers within an area (i.e., county or other geography) that are currently employed, regardless of the location of their employment (i.e., they may hold jobs in their own county or commute to work outside the county).

<sup>3</sup> The term "jobs" relates to the place of work; thus, the reported number of jobs in a county refers to jobs that are based in that county, regardless of where the jobholder lives (i.e., they may be residents of the county or they may be non-residents who commute in from other counties).

TABLE 4-1. SELECTED ECONOMIC AND HOUSING CHARACTERISTICS, LA PAZ COUNTY, YUMA COUNTY, CCR, AND AZ

| Variables   | La Paz County | Yuma County | CRR      | AZ        |
|---|---------------|-------------|----------|-----------|
| <b>EMPLOYMENT STATUS</b>  |               |             |          |           |
| Population 16 years and over  |               |             |          |           |
| Labor Force Participation Rate  | 42.9%         | 53.6%       | 52.7%    | 60.5%     |
| Employment/Population Ratio   | 38.1%         | 46.8%       | 46.1%    | 57.0%     |
| Unemployment Rate   | 10.8%         | 8.1%        | 8.3%     | 5.2%      |
| <b>INDUSTRY</b>   |               |             |          |           |
| Civilian employed population 16 years and over  |               |             |          |           |
| Agriculture, forestry, fishing and hunting, and mining  | 7.7%          | 9.7%        | 9.6%     | 1.3%      |
| Construction  | 9.3%          | 7.0%        | 7.2%     | 7.7%      |
| Manufacturing   | 3.9%          | 5.7%        | 5.5%     | 7.4%      |
| Wholesale trade   | 1.0%          | 3.0%        | 2.9%     | 2.1%      |
| Retail trade  | 11.5%         | 10.5%       | 10.6%    | 11.9%     |
| Transportation and warehousing, and utilities   | 5.4%          | 5.4%        | 5.4%     | 5.7%      |
| Information   | 0.7%          | 1.0%        | 1.0%     | 1.6%      |
| Finance and insurance, & real estate & rental & leasing   | 4.4%          | 3.8%        | 3.8%     | 8.9%      |
| Professional, scientific, & mgmt, & admin & waste mgmt srvc                                     | 6.0%          | 9.6%        | 9.3%     | 12.6%     |
| Educational services, & health care & social assistance   | 18.4%         | 20.4%       | 20.3%    | 22.0%     |
| Arts, entertainment, & recreation, & accommodation & food srvc                                  | 18.2%         | 10.1%       | 10.7%    | 9.5%      |
| Other services, except public administration  | 2.1%          | 4.1%        | 4.0%     | 4.5%      |
| Public administration   | 11.3%         | 9.6%        | 9.7%     | 4.8%      |
| <b>INCOME AND BENEFITS (IN 2021 INFLATION-ADJUSTED DOLLARS)</b>                                 |               |             |          |           |
| Median household income (dollars)   | \$49,506      | \$60,417    | -        | \$76,872  |
| Mean household income (dollars)   | \$68,092      | \$77,603    | \$76,618 | \$104,138 |
| Per capita income (dollars)   | \$33,413      | \$28,918    | \$29,251 | \$40,736  |
| <b>PERCENT OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW POVERTY LEVEL</b> |               |             |          |           |
| All families  | 15.2%         | 13.8%       | 13.9%    | 8.9%      |
| Married couple families   | 11.1%         | 7.8%        | 8.1%     | 5.1%      |
| Families with female householder, no husband present  | 36.7%         | 29.3%       | 29.9%    | 22.3%     |
| All people  | 18.4%         | 16.5%       | 16.6%    | 12.8%     |
| 18 years and over   | 16.6%         | 14.4%       | 14.6%    | 11.6%     |
| 18 to 64 years  | 23.6%         | 14.6%       | 15.1%    | 12.1%     |
| 65 years and over   | 9.7%          | 14.0%       | 13.4%    | 9.9%      |
| <b>TOTAL HOUSING UNITS</b>  |               |             |          |           |
| Occupied housing units  | 65.1%         | 81.9%       | 79.7%    | 89.0%     |
| Vacant housing units  | 34.9%         | 18.1%       | 20.3%    | 11.0%     |
| <b>HOUSING TENURE</b>   |               |             |          |           |
| Occupied housing units  |               |             |          |           |
| Owner-occupied  | 57.7%         | 68.5%       | 69.1%    | 66.3%     |
| Renter-occupied   | 42.3%         | 31.5%       | 30.9%    | 33.7%     |
| <b>SELECTED MONTHLY OWNER COSTS AS A PERCENTAGE OF HOUSEHOLD INCOME (SMOCAPI)</b>               |               |             |          |           |
| Housing units with a mortgage   |               |             |          |           |
| Less than 20.0 percent  | 53.8%         | 48.0%       | 48.3%    | 49.0%     |
| 20.0 to 24.9 percent  | 9.9%          | 15.0%       | 14.7%    | 14.9%     |

| Variables                                   | La Paz County | Yuma County | CRR   | AZ    |
|---|---------------|-------------|-------|-------|
| 25.0 to 29.9 percent                        | 10.4%         | 9.4%        | 9.4%  | 9.6%  |
| 30.0 to 34.9 percent                        | 6.6%          | 6.2%        | 6.2%  | 6.3%  |
| 35.0 percent or more                        | 19.4%         | 21.4%       | 21.3% | 20.2% |
| <b>Housing units without a mortgage</b>     |               |             |       |       |
| Less than 10.0 percent                      | 46.5%         | 52.6%       | 51.6% | 53.5% |
| 10.0 to 14.9 percent                        | 20.8%         | 19.0%       | 19.3% | 17.4% |
| 15.0 to 19.9 percent                        | 8.7%          | 8.2%        | 8.3%  | 8.8%  |
| 20.0 to 24.9 percent                        | 5.0%          | 6.0%        | 5.9%  | 5.1%  |
| 25.0 to 29.9 percent                        | 4.7%          | 4.1%        | 4.2%  | 3.4%  |
| 30.0 to 34.9 percent                        | 3.1%          | 1.6%        | 1.8%  | 2.4%  |
| 35.0 percent or more                        | 11.2%         | 8.4%        | 8.8%  | 9.5%  |
| <b>EDUCATIONAL ATTAINMENT</b>               |               |             |       |       |
| <b>Population 25 years and over</b>         |               |             |       |       |
| Less than high school graduate              | 17.5%         | 23.3%       | 22.8% | 11.0% |
| High school graduate (includes equivalency) | 34.1%         | 26.7%       | 27.4% | 23.5% |
| Some college or associate's degree          | 34.6%         | 33.3%       | 33.4% | 33.0% |
| Bachelor's degree or higher                 | 13.9%         | 16.6%       | 16.4% | 32.6% |

Note: Values provided as shares unless where noted.

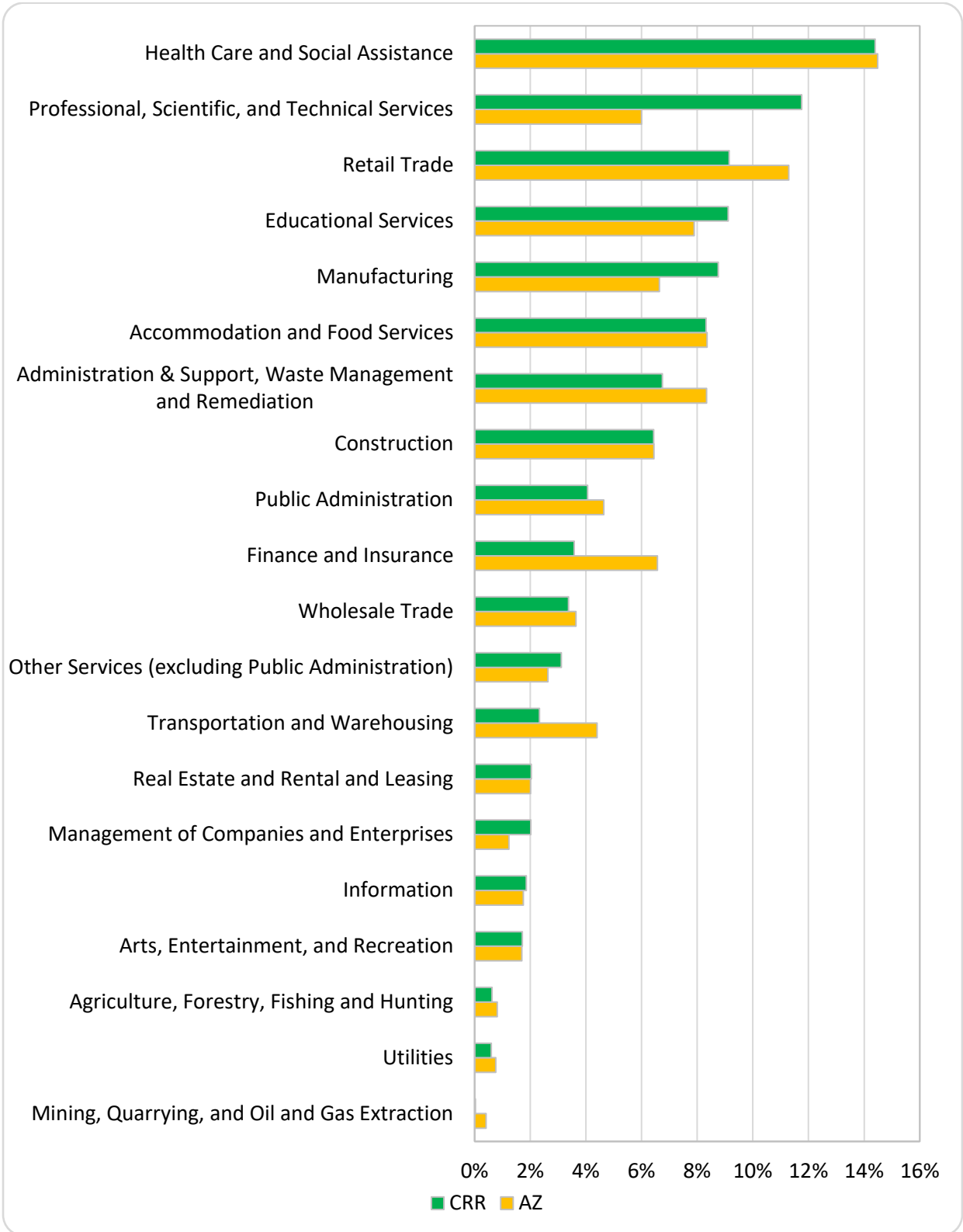
Source: U.S. Census Bureau, 2019-2023 ACS 5-Year Estimates; TNDG.

**TABLE 4-2. POPULATION PROJECTIONS, COMPARATIVE GEOGRAPHIES (2024-2030)**

| Geographies   | 2024      | 2025      | 2026      | 2027      | 2028      | 2029      | 2030      | % Chg  |
|---------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|--------|
| La Paz County | 17,034    | 17,128    | 17,192    | 17,233    | 17,253    | 17,251    | 17,228    | 1.14%  |
| Yuma County   | 216,137   | 219,249   | 222,107   | 224,921   | 227,687   | 230,400   | 233,060   | 7.83%  |
| CRR           | 233,171   | 236,377   | 239,299   | 242,154   | 244,940   | 247,651   | 250,288   | 7.34%  |
| Arizona       | 7,699,474 | 7,854,359 | 7,998,647 | 8,139,000 | 8,275,409 | 8,408,372 | 8,538,048 | 10.89% |

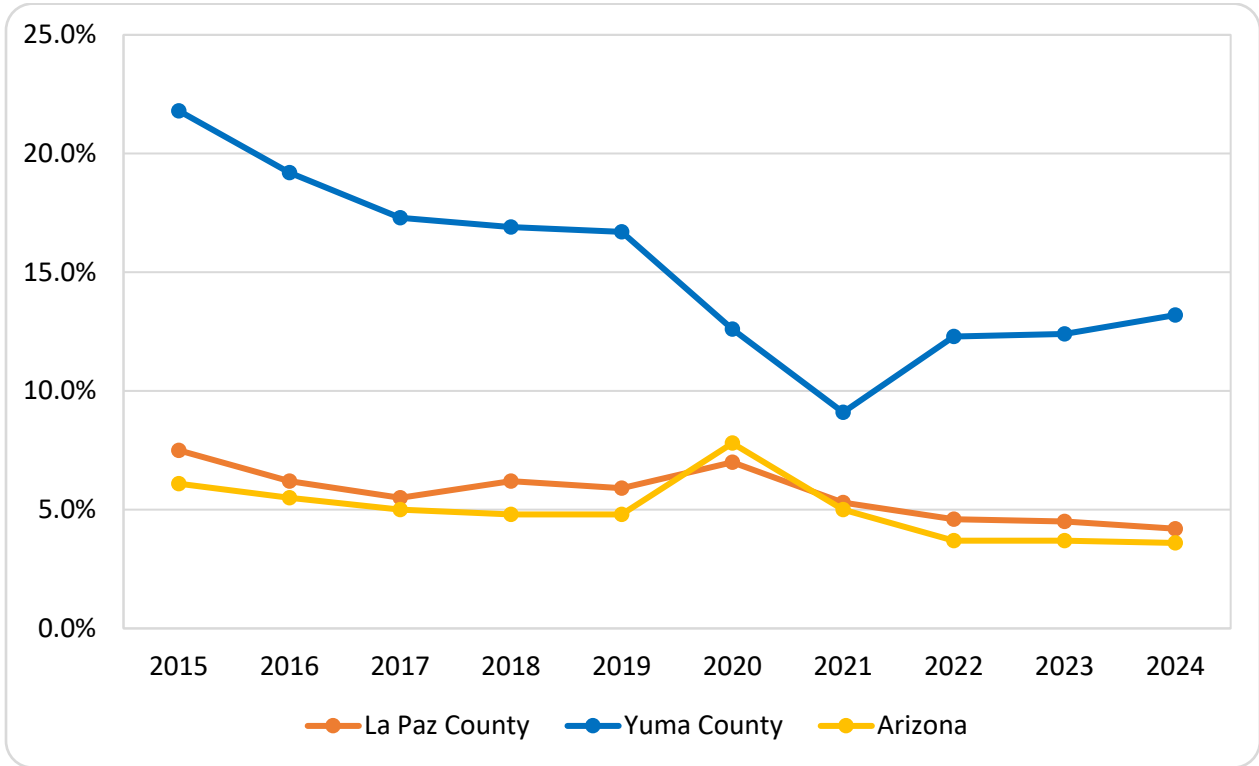
Source: Arizona Office of Economic Opportunity; TNDG.

TABLE 4-3. EMPLOYMENT BY INDUSTRY FOR CRR AND AZ



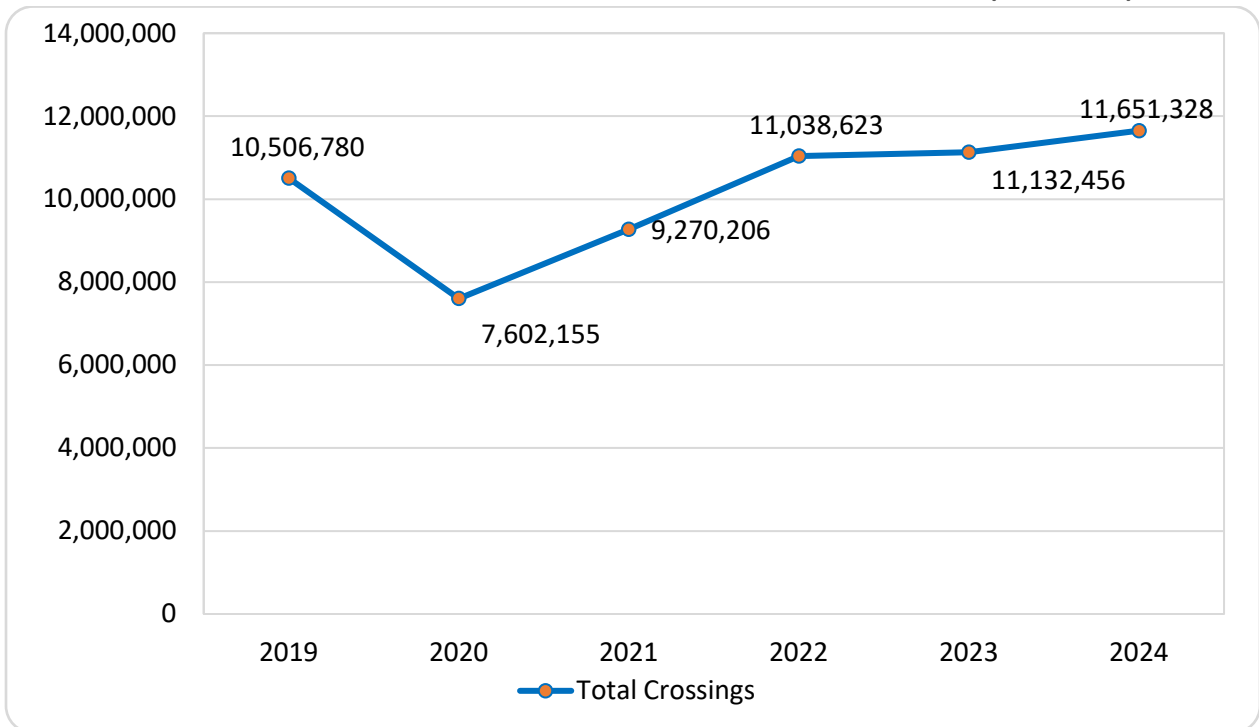
Source: U.S. Census Bureau, OnTheMap LEHD Origin-Destination Employment 2022; TNDG.

**TABLE 4-4. ANNUAL UNEMPLOYMENT RATES, LA PAZ COUNTY, YUMA COUNTY, AND AZ (2015-2024)**



Source: Arizona Office of Economic Opportunity; TNDG.

**TABLE 4-5. TRAFFIC COUNTS AT THE SAN LUIS BORDER CROSSING BY TYPE BY YEAR (2019-2024)**



Source: U.S. DOT, Border Crossing Entry Data; TNDG.



## 5. Target Industries and Business Attraction Incentives

### High-Priority Industry Clusters Identified by CEDS Strategy Committee

The CEDS Action Plan is organized around the following high-priority industry clusters (and related economic development initiatives) selected by the CEDS Strategy Committee:

- Clean tech manufacturing
- Ag tech
- Manufacturing (including reshoring opportunities))
- Healthcare
- Logistics/distribution
- Spaceport and related business opportunities
- Tourism / winter visitors
- Alignment with the following State of Arizona economic development priorities: Aerospace, Bioscience/Healthcare, Business/Financial Services, Film/Digital Media, Manufacturing and Innovation

The existing industry targeting initiatives of the region's two economic development corporations (GYEDC and LPEDC) are summarized below, followed by information about key business attraction incentives currently available in the region.

### Existing County Level Industry Targeting Initiatives

#### ***“Leading Industries” targeted by GYEDC (Yuma County):***

**Overview.** The Greater Yuma region is a dynamic hub of innovation and economic opportunity, powered by major industries that drive its growth. Advanced Manufacturing leverages cutting-edge technology and skilled talent to produce high-quality products that meet global demand. Aerospace and Defense capitalize on Yuma's strategic location and robust infrastructure, supporting national security and technological advancement. Logistics and Distribution thrive here, with seamless connectivity to major markets across the U.S. and Mexico. Meanwhile, Food Processing and Agriculture Technology harness the region's rich agricultural heritage, utilizing innovative techniques to feed the world.

In addition to these key industries, the Greater Yuma region is making bold strides into the clean energy and clean technology space. Yuma is poised to become a leader in sustainable innovation. This expansion not only diversifies our economic base but also underscores our commitment to fostering a greener, more sustainable future. Together, these industries form the backbone of our economy, creating jobs, fostering innovation, and positioning Yuma as a leader in global commerce.

**Advanced Manufacturing.** Advantages to the Yuma region include: Proximity to major consumer markets, supply chain connectivity on both sides of the border, and an industrial production workforce of over 15,000. Air, rail, port, and interstate infrastructure connect the region to over 100 million people within a two-day truck haul.

Vocational manufacturing training is available in over 20 licenses/certifications and is offered at two industrial training facilities within the area. A strong water position with capacity for growth, redundant

electrical infrastructure, natural gas looped system, and high-speed fiber throughout the county support continued growth by local firms.

**Aerospace & Defense.** Advantages within the Yuma region include: 350+ days of no inclement weather – an ideal testing climate that has made Yuma County a destination for companies such as Boeing, Lockheed Martin, Northrop Grumman, and Rolls Royce Engines. The area also has a 1,300 square mile proving ground for weapons, aerial systems and ground vehicles. The Yuma Defense Contractor Complex is a 100+ acre aviation industrial park with aprons and taxiways that connect to 13,300’, 10,000’+, and 8,000+ runways for aerial systems of all sizes. A veteran labor force of 6,400+ former military members with avionic technician and mechanical backgrounds creates a built-in workforce for MRO, R&D, and manufacturing activities.

**Food Processing & Ag-Tech.** Advantages within the region include: fertile soil, senior water rights to the Colorado River, and an expansive land mass. The Greater Yuma region is able to grow 170+ different crops. Within a 100-mile radius food processors can access poultry farms with 2,000,000+ chickens and feed lots with 750,000+ head of cattle. The region also has commercial dairy farms producing 800,000+ gallons of fluid milk per month along with 40,000 acres of wheat grown annually. A food production workforce of 15,000 individuals generates 90% of the nation’s winter leafy vegetables and other crops for worldwide consumption.

**Logistics & Distribution.** The greater Yuma region is located on the border of 4 states and 2 countries, giving the region a consumer base of 1.8 million people and access to 52 million people within a one-day truck haul. Foreign Trade Zone #219 offers additional warehousing and supply chain benefits along with proximity to 4 ports of entry, and is less than 6 hours away from The Port of Los Angeles/Long Beach.

***LPEDC Mission Statement and Goals (references to targeted industries are highlighted):***

**Mission Statement**

*The Mission of the LPEDC is the development of economic wealth for the well-being of our inhabitants through sustainable improvements in our standard of living.*

**Goals**

1. To provide a county-wide professional economic development organization involving all interested public and private organizations.
2. To increase employment by retention, recruitment and expansion in the **retail sector**
3. To enable economic diversity through attraction, expansion and retention of **industrial, manufacturing and agricultural related** employers
4. To promote sustainable environmental stewardship
5. To provide educational economic development opportunities
  - Workforce Development
  - Leadership Academy

6. To promote county-wide communication and coordination regarding issues affecting economic development
  - Infrastructure
  - Housing
  - Telecommunications
  - Health Care
  - Education
  - Beautification
  - Recreation
  
7. To implement a world class website to provide accessible comprehensive information regarding living, working and doing business in La Paz County, Arizona

## Existing Business Attraction Incentives

### *Incentives promoted in GYEDC marketing materials:*

#### REGIONAL INCENTIVES

**City of Yuma Incentives.** The City of Yuma offers a range of incentives to support business growth and development. Their 2023 Incentive Policy has been revised to include competitive benefits for companies seeking to establish or expand operations in the area. Additionally, the Infill Incentive Plan targets underutilized spaces, providing opportunities to revitalize and maximize the potential of existing properties. For more details, visit the 2023 Incentive Policy and Infill Incentive Plan through the provided links.

**Yuma County Economic Development Fund.** Yuma County has created a performance-based incentive fund designed to encourage new business development, business expansions and relocations with infrastructure improvement requirements. The value of the fund is indexed based upon the cost to hire and train qualified new employees and/or infrastructure improvements to county-maintained property up to \$1,000/per new hire.

**Workforce Salary and Training Grant.** Yuma's Workforce Board offers programs that cover the entire costs of employee training, including teaching, materials, equipment and other expenses. Companies can additionally qualify for reimbursement of 50% employee salaries paid during training for up to 6 months.

**Construction Sales Tax Reimbursement.** The incentive provides up to 100% credit of construction sales tax to qualifying expenses such as job-training, public infrastructure improvements and/or offsets to impact fees.

**Water and Sewer Connection Fee Amortization.** Cities may amortize the cost of water and sewer connection fees up to seven years from the agreement date in order to assist companies with alleviation of up-front construction costs. Cities cannot legally waive fees.

**Plan Permit Expedition and Fee Waivers.** The cities pledged to expedite permits in as little as 15 days based upon designed and application completion. The City may also waive building, plan, and development permit fees.

**Mexican Health Care Plan.** The Mexico plan is underwritten by U.S.-based firms and affords individuals the option to seek medical care in either San Luis Rio Colorado, MX or Algodones, Baja, MX (both sister cities to Yuma). Premium cost savings can include up to 1/3 of the cost of a traditional U.S. plan.

**Industrial Development Bond.** Industrial Development Authorities created by various municipalities within Yuma County, or the Yuma County IDA, are prepared to issue Industrial Development Bonds (IDB) for the construction of qualified projects on a conducting basis for the companies. The interest on the debt obligation may be tax exempt and therefore bears a lower interest rate (1-2% below market) and the term for bonds may be as long as 30 years. (IDA may issue taxable and tax-exempt bonds)

**New Market Tax Credits.** Below market interest loans guaranteed by the federal government for the purpose of stimulating development in rural communities. Companies utilizing New Market Tax Credits pay on the interest only of the loan for seven years. After the 7th year, the loan is forgiven and the company is awarded the principal and equity of the loan.

**Yuma Opportunity Zones.** Users within designated census tracts can benefit from no capital gains tax along with tax breaks on untaxed capital gains rolled into a zone.

**Foreign Trade Zone #219.** Along with duty and tariff elimination or reduction, Arizona offers up to an 80% reduction in state real and personal property taxes by operating in a federally qualified Foreign Trade Zone. The reduction is good for the entire time that a company operates in the FTZ.

## **STATE INCENTIVES**

**Qualified Facilities Program.** Offers a refundable income credit equal to the lesser of 10% of the qualifying capital investment, or \$20,000 per net new job at the facility.

**Income Tax Credits up to \$9,000 for each qualifying new job.** The Quality Jobs Tax Credit replaces Arizona's expiring Enterprise Zone Program. It provides per employee tax credits of \$3,000 per new year for up to three years. Credits may be carried forward for five years. Eligibility qualifications are different from rural to metro areas and focus on capital investment and net new job creation (5 new jobs rural/25 new jobs metro).

**\$1.5 Million in Reimbursable Grants to Train Employees.** Arizona provides reimbursable grants to employers that implement job-specific training plans for new jobs or for training plans that increase the skill level of current employees. Award amounts range from \$2,000 to \$8,000 per position depending upon company size and location.

**No Sales Tax on Manufacturing Equipment.** Manufacturing equipment purchased within the state of Arizona qualifies for a sales tax waiver.

**Utility Sales Tax Waiver.** Manufacturers and processors that utilize more than 50% of electricity or gas to produce their commodity can qualify for a sales tax waiver on their utility bills.

**5-Year Accelerated Depreciation Schedules.** Five-year accelerated depreciation schedules have been increased to help companies recover their investments even faster.

***Tax Reductions by Investing in Renewable Energy.*** Companies engaged in solar, wind, geothermal and other renewable energy industries may obtain up to a 10% refundable income tax and up to a 75% reduction on real and personal property taxes.

***R&D Tax Credits.*** The Research and Development Tax Credit (R6D) is a tax credit available to businesses of all sizes that engage in research and development activities conducted at a state university and funded by the company. Companies can claim a refund up to \$100,000 in a single tax year.

***Incentives promoted in LPEDC (La Paz County) marketing materials:***

**Industrial Development Authority**

The Industrial Development Authority of La Paz County, Arizona was established in 1985 by La Paz County under the Industrial Development Financing Act, Arizona Revised Statutes §35-701 et. seq. The Industrial Development Authority of La Paz County is an Arizona nonprofit corporation and political subdivision possessing statutorily prescribed powers.

The Authority assists in the financing of commercial and industrial enterprises; safe, sanitary and affordable housing; and healthcare facilities through the issuance of revenue bonds. The Industrial Development Authority is a subdivision of the State whose Board members are appointed by the Board of Supervisors.

As a nonprofit corporation under the laws of Arizona, the Industrial Development Authority of La Paz County has broad powers, including issuing bonds for specific types of projects described in the state law-enabling legislation.

Such “projects” include, but are not limited to the following:

1. Educational facilities;
2. Manufacturing facilities;
3. Office buildings for use as corporate or company headquarters or regional offices;
4. Health care institutions;
5. Housing; and
6. Any facilities owned or operated by a 501(c) organization.

**Arizona Prospector (provided by Arizona Public Service)**

Arizona Prospector is a website that allows users to identify available commercial property. The website also provides data including workforce demographics, business information, and interactive maps. The data is created and displayed using a Geographic Information System (GIS) that combines layers of information in order to better understand comprehensive details about a specific location and is powered by GIS Planning's ZoomProspector software. The website is provided by the Arizona Public Service, and is FREE.

Any commercial broker, property owner, developer, or similar real estate entity can list available commercial or industrial property. There is no cost to participate. Arizona Prospector serves as a free, dynamic and comprehensive listing system for brokers and interested companies. With their informed list of leads, website visitors can contact the respective brokers directly about specific properties. Linked to the Arizona Public Service frequently-trafficked website, Arizona Prospector promotes the properties listed by real estate professionals. Arizona Prospector also provides critical business data giving enormous exposure to listed properties and real estate brokerage firms.

***March 11, 2025 press release from Senator Mark Kelly:***

**Kelly, Gallego Introduce Bill to Expand Economic Opportunity in La Paz County**

*Bill will enable La Paz County to create hundreds of jobs and power thousands of homes*

Today, Arizona Senators Mark Kelly and Ruben Gallego introduced the [La Paz County Solar Energy and Job Creation Act](#), legislation to allow La Paz County, Arizona to purchase 3,400 acres of certain federal lands to further its economic development and optimize the generation of additional solar energy. Companion legislation was introduced in the House by Arizona Representatives Paul Gosar, Andy Biggs, and David Schweikert.

Under a previous land transfer, La Paz County made remarkable progress in creating a large solar park adjacent to the Ten West Link transmission project through central Arizona. Today's legislation will allow La Paz County to continue this project, developing a planned 500 MW of solar capacity and up to 900 MWH of battery storage, which is enough to power about 75,000 homes. The project will create 700 construction jobs and 10 permanent positions.

"La Paz County is using its resources to power thousands of homes with clean, affordable energy while creating good-paying jobs," said Kelly. "This expansion builds on that success, strengthening Arizona's leadership in solar energy and boosting the local economy."

"Solar developments create jobs and power Arizona homes with affordable, sustainable energy," said Gallego. "I'm proud to introduce this bill to enable La Paz County to continue its incredible work harnessing Arizona's most abundant resource – the sun."

"La Paz County wishes to thank Senator Kelly and Senator Gallego for reintroducing the La Paz Solar Energy and Job Creation Act. This vital legislation is key to our strategic plan for La Paz County to be home to the largest solar project in the nation, bringing new jobs and economic development to our region. The bill also represents the partnership between La Paz County and the Colorado River Indian Tribes focused on preserving tribal artifacts as development occurs. Significant progress and benefits have resulted from the first phase of this project, and this bill builds upon that opportunity," said Supervisor Holly Irwin, La Paz County, District 3.

"Protection of CRIT cultural resources and economic development are not partisan issues, so I am grateful that Senator Gallego is joining Congressman Gosar in introducing this legislation," said Amelia Flores, Chairwoman of the Colorado River Indian Tribes (CRIT). "CRIT and La Paz County are well underway on the first phase of this project, and we look forward to continuing the productive relationship in the years to come."

## 6. Important (“Game Changer”) Initiatives in the Region

Three initiatives are addressed in this section: 1) the regional spaceport, 2) education/training initiatives related to Elevate Southwest, and 3) the Yuma Innovation District and Hub in Downtown Yuma.

### 1. Spaceport

A consortium of regional spaceport stakeholders, the Southwest Regional Aerospace Innovation Alliance (Alliance), has prepared a final application to the National Science Foundation (NSF) entity, the Regional Innovation Engines program. This program is sponsoring a competitive process through which regional innovation will be supported across the US, with a focus on having innovation drive growth in underserved regions. The Yuma region is one of 71 finalists nationwide, and one of only two in Arizona. If selected, the Alliance could receive up to \$160 million over 10 years.

Elevate Southwest is leading the Alliance effort. Other key regional partners include the City of Yuma, Greater Yuma Economic Development Corporation, and Arizona Western College. The Alliance aims to drive innovation and economic growth in aerospace, satellite communications, and defense industries, with a focus on underserved regions. As part of its proposal, the Alliance seeks to:

- Establish a Yuma-based spaceport to enhance national security and reduce costs compared to coastal alternatives.
- Advance environmentally friendly propulsion systems for space exploration.
- Equip the workforce with skills to meet demands in aerospace, defense, and satellite industries.
- Create 2,500–3,000 new jobs annually and drive \$2 billion in annual industrial growth.

Regional stakeholders view this project as a transformative initiative that would position Yuma as a leader in aerospace innovation, with an enhanced potential to attract high-tech industries and thereby create thousands of jobs.

The Arizona legislature is supporting space-related activities through establishment of a Space Exploration and Aeronautics Research Fund, which can be used to provide grants to businesses or nonprofit organizations in Arizona that are involved in the space exploration or aeronautics industry. The funds can be used for a variety of purposes, ranging from research and development, to job training, to infrastructure.

Among the many dimensions of spaceport-related industries, the Arizona Commerce Authority is promoting the notion of nanosatellites – the downsizing of satellites – as a major influence to evolving technology expected to radically change global communications. The lightweight and compact nature of nanosatellites reduces the economic cost for space launch and construction costs (and presumably would reduce the impacts of launches, etc.).

Other industries related to the spaceport, as envisioned by other parties to this process, could include:

- Engine Development and Testing
- Ground Station Services
- Remote Sensing Data Product Development, in addition to
- Satellite Manufacturing

## **2. Elevate Southwest**

Elevate Southwest has identified six components (“Big Ideas”) that together help define an overall Regional Action Plan. These all align with the organization’s goals of offering students in the Greater Yuma Region (GYR) multiple post-secondary educational pathways, including internships, mentorships, certificate programs, and associate, bachelor, and post-graduate degrees. These goals and turn also support the goal of increasing the number of high school graduates in the GYR earning associate, bachelor, and advanced degrees. Implementing this goal is also understood to be a way of retaining students in the region.

The six components are:

1. Expanding education pathways to post-secondary and higher education for the citizens of the region and increasing the number of students completing their courses and degrees.
2. Improving the profile and brand of Yuma County -- locally, regionally, and nationally.
3. Making Yuma County a more attractive place for workers and businesses, and expanding employment opportunities, entertainment and recreation, and housing.
4. Expanding STEM programs at all educational levels.
5. Positioning the region as a National Center of Excellence in High Tech, Precision, and Sustainable Agriculture.
6. Creating the Yuma Innovation District and Hub in Downtown Yuma with satellite facilities in other communities including San Luis, Somerton, and Wellton, which is discussed in greater detail following.

Elevate Southwest is also drafting specific project initiatives by which to implement these components.

### **3. Yuma Innovation District and Hub in Downtown Yuma**

This sixth Big Idea of Elevate Southwest is a central element of the organization’s overall Action Plan – a project to transform Downtown Yuma into a compelling live, learn, work, play, and stay environment – which would also serve as the “centerpiece of our efforts.” As envisioned, the Yuma Innovation District will occupy 60 acres of land across from City Hall and adjacent to historic Downtown Yuma. At the heart of the Innovation District will be the Innovation Hub, a 75,000 square foot state-of-the-art building that will house private and public sector tenants engaged in education, research, and development.

The vision for the Innovation Hub includes the notion that it will weave together, in a nurturing environment, the economic, environmental, and social issues in the region while also driving key economic engines of agriculture, aerospace, defense, etc. toward greater productivity through innovation. The project is grounded in stakeholder input received through prior years of other research and documentation.



## 7. Strategic Direction / Action Plan

### Key Themes Addressed

The CEDS Action Plan is designed to leverage the CRR's existing and emerging economic strengths, while systematically addressing current and longstanding challenges to the region's prosperity. During the course of the CEDS planning process, **the following key themes emerged as significant drivers of the strategic vision outlined in the CEDS:**

- Maximizing “next level” opportunities related to the region’s longstanding mainstay industries (agriculture, tourism, international trade, and defense-related activities);
- Expanding the region’s leadership in the renewable energy cluster;
- Connecting the presence of military/defense installations in Yuma County (and adjacent Imperial County, Arizona) to expand R&D and manufacturing investment in targeted industries such as aerospace;
- Aggressively pursuing a proposed spaceport in Yuma County, which stands to be fundamental economic “game changer” for the overall region;
- Capitalizing on the region’s established status as a destination for both domestic and bi-national visitation and recreation; and
- Leveraging the region’s strategic location within the Arizona-California-Mexico border region, which supports tremendous opportunities for international trade, “onshoring” of manufacturing, and border-related tourism.

### Goals, Strategies and Action Items

The Action Plan is organized around seven major goals, and associated strategies and action items. These are detailed below.

#### **Goal 1 – Create high-paying employment opportunities through robust business retention/expansion/attraction programming focused on the region’s core industry clusters**

##### **Strategy 1A: Launch business attraction campaign for the two-county region**

##### Action Items

- Convene quarterly meetings between the two economic development corporations serving the region – La Paz Economic Development Corporation (LPEDC) and Greater Yuma Economic Development Corporation (GYEDC) – to establish shared priorities for business attraction/marketing and to coordinate regionally-significant business attraction programs.
- Establish annual work plan for regionally coordinated business attraction efforts (separate from, but complementary to, each EDC’s county-level business attraction efforts). This work plan should be tied to the regional marketing campaign described under Strategy 6A below).

- Create memorandum of understanding (MOU) between LPEDC and GYEDC outlining year-to-year business attraction efforts to be pursued through the regional business attraction program; assigning responsibilities of each party; and defining budget requirements for shared costs.

**Strategy 1B: Expand business retention/expansion (BRE) outreach and strengthen business assistance resources (focusing on firms in high-priority, regionally significant industry clusters)**

Action Items

- Establish MOU between LPEDC and GYEDC to define scope and responsibilities for a joint BRE program focused on high-priority, regionally significant industry clusters.
- Launch multi-faceted BRE outreach to high-priority firms (identified on the basis of size, industry, and any known plans to downsize/relocate). This outreach could include online surveys (conducted on an ongoing basis to maintain continuous contact with the business community); advertising to promote awareness of available business assistance resources; and telephone interviews or site visits with selected firms.
- Establish protocols for communication between LPEDC and GYEDC on confidential BRE cases and for rapid deployment of BRE assistance resources when needed.

**Strategy 1C: Develop regional business attraction incentives to supplement local (city, county) offerings**

Action Items

- Convene ad hoc committee to assess the need for additional business attraction incentives to supplement existing resources
- Coordinate with public sector partners at the city, county and state levels to advocate for expanded resources based on needs assessment
- Develop updated content for LPEDC and GYEDC websites about specific assistance resources available for targeted industry clusters

**Strategy 1D: Develop priorities and action plan to improve the region's business friendliness and development capacity**

Action Items

- Establish Business Climate / Regulatory / Land Use Policy taskforce to define and prioritize action items related to the region's business and development friendliness. The range of issues to be considered by this taskforce would include (as examples):
  - Address specific current issues with local business/development permitting (e.g., planned childcare facilities have encountered difficulties with permitting)

- Fairgrounds – high priority to address land use incompatibilities with military
- Concentrated land ownerships (federal/state /big agriculture) may impede development

**Goal 2 – Attract innovation investment and strengthen business startup ecosystem through “game-changing” initiatives currently being launched in the region**

**Strategy 2A: Aggressively secure resources and initiate implementation of the Yuma Spaceport concept; in addition to potentially driving innovation and economic growth, this initiative will also be a way to rally stakeholders around an aggressive but potentially influential common cause, and in the process help secure support for related and other initiatives**

Action Items

- Finalize application for the National Science Foundation’s Regional Innovation Engines grant (see Chapter 6 of the CEDS for details).
- Establish Spaceport Taskforce to coordinate implementation of NSF grant (and associated interface with county-level economic development partners, led by GYEDC).
- Coordinate with public sector partners at the city, county and state levels to advocate for expanded resources (and policy changes such as zoning) to support full realization of the Spaceport program.
- Prominently position Spaceport within all economic development marketing materials for the region.

**Strategy 2B: Focus regional resources and political support around the Elevate Southwest initiative**

Action Items

- Convening working group comprising Elevate Southwest (ESW) leadership, GYEDC and (as appropriate) LPEDC to facilitate integration of ESW initiatives into regional economic development priorities, resources, and marketing messaging.
- Define and formalize interface between ESW initiatives and implementation of Spaceport program.
- As envisioned, the Yuma Innovation District will occupy 60 acres of land across from City Hall and adjacent to historic Downtown Yuma. At the heart of the Innovation District will be the Innovation Hub, a 75,000 square foot state-of-the art building that will house private and public sector tenants engaged in education, research, and development.

- Coordinate with public sector partners at the city, county and state levels to advocate for expanded resources to support effective implementation of ESW’s priorities (including the Innovation District / Innovation Hub planned for Downtown Yuma).

**Strategy 2C: Establish regional entrepreneurial development consortium to provide “one stop” point of access to business startup resources offered by partner organizations**

Action Items

- Establish a Colorado River Region Office of Entrepreneurial Development (to be housed in GYEDC) to serve as a clearinghouse for entrepreneurial development services and resources available through partner organizations.
- Ensure full “connectivity” and accessibility of SBDC services/resources throughout the two-county region.
- Convene taskforce to assess opportunities to expand “access to capital” programs/resources (with a particular focus on startup opportunities that will emerge from Spaceport and Elevate Southwest initiatives).
- Launch new initiative (to be led by GYEDC, with support from LPEDC as appropriate) focused on getting entrepreneurs “lender-ready” (through CDFI’s, etc.).

**Goal 3 – Promote the region as a destination for sustainable tourism (including agritourism) and outdoor recreation (this goal is closely related to Goal 6, which is intended to demonstrate that the region is more complex/attractive than might be commonly perceived)**

**Strategy 3A: Launch regional marketing and branding initiative to promote “Arizona’s Colorado River Region” as destination**

Action Items

- Within GYEDC’s current process of developing a new marketing campaign for Yuma County, identify opportunities to promote the Colorado River Region (collectively) as a tourism/recreation destination.
- Assess the need for a separate branding effort focused on promoting the Colorado River Region as an externally recognized tourism brand and develop branding materials based on the outcome of this assessment.

**Strategy 3B: As part of business attraction initiative (Strategy 1A), target attraction of major visitor-serving facilities (e.g., hotels, sports venues, etc.)**

Action Items

- Coordinate with the region’s convention and visitor bureaus (Visit Yuma and Visit La Paz County) to identify specific targets for attracting visitor-serving facilities (hotels, sports venues, etc.) consistent with market demand.

- As needed, commission market/financial feasibility studies (for specific targeted facility types) to document development opportunities related to the region’s tourism potentials.
- Promote specific tourism-related development opportunities as part of regional business attraction and marketing efforts.

**Strategy 3C: Establish regional (two-county) tourism consortium to identify shared market opportunities and prioritize investment in visitor amenities that are regional in scale and impact**

**Action Items**

- Coordinate with Visit Yuma and Visit La Paz County to identify specific needs for investment in public sector amenities that would support expansion of the region’s tourism market.
- As needed, commission feasibility studies (including analyses of potential funding sources) for desired visitor-oriented amenities.
- Coordinate with public sector partners at the city, county and state levels to define strategy for developing high-priority tourism infrastructure/amenities.

**Goal 4 – Leverage region’s educational institutions and workforce development resources to maximize connection between resident workforce and emerging job opportunities**

**Strategy 4A: Coordinate on an annual basis (or more frequently as needed) with county-level Workforce Development Boards and educational institutions to ensure capacity and prioritization of training programs relevant to needs of targeted/emerging industries**

**Action Items**

- Continue to promote Yuma County’s workforce development resources as a potential connection to Lithium Valley employment opportunities (a major economic development initiative in adjacent Imperial County, California, focused on building an advanced manufacturing ecosystem around planned lithium extraction).
- Support the region’s continued focus on increasing skilled workforce (consistent with the Pathways to Prosperity, Jobs for the Future model).
- Convene taskforce to explore strategies/policies to address the region’s severe shortage of childcare facilities and services.
- Build on the “action committee” framework of the Yuma Manufacturers Association to address specific workforce development challenges of manufacturing firms (e.g., Yuma Health Care Workforce Action Committee).

- Leverage the “Good Jobs Challenge” program (an NSF funding opportunity being led locally by GYEDC, with support from the Yuma Manufacturers Association).
- Leverage available Arizona@Work resources (connecting employers to trainees/job seekers, with monetary incentives) and ensure full alignment of these resources with the region’s business attraction and entrepreneurial development priorities.
- Improve operation of Pathways to Prosperity program (already fully implemented within the region, but with ongoing challenges related to matching students to work-based learning opportunities). This could potentially involve expanding paid internships) through the Arizona Personalized Learning Network (AZPLN) developed by the Center for the Future of Arizona (and (AZPLN). AZPLN is a cohort of four school districts (including Yuma Union High School District) that have made a five-year commitment to shift to a personalized learning approach.

**Strategy 4B: Leverage partnerships with organizations/initiatives (e.g., Elevate Southwest) that can serve as conduits between firms in high-priority industries and workforce development resources**

Action Items

- Identify all economic development organizations and initiatives that routinely interface with existing or prospective employers and/or entrepreneurs; establish streamlined, business-friendly mechanisms (e.g., confidential questionnaires) for documenting the workforce recruitment and training needs of firms in targeted industries.
- Consistently document (in a manner that maintains appropriate confidentiality protocols) workforce related challenges and needs as part of all BRE outreach, discussions with business attraction prospects, and interface with entrepreneurs.
- Establish efficient process for summarizing collected information (regarding private sector workforce training needs) and distribute it to county-level workforce development partners at regular intervals.

**Goal 5 – Prioritize investments in infrastructure critical to the growth of targeted industry clusters**

**Strategy 5A: Convene CEDS Strategy Committee twice annually to identify and prioritize needed regional infrastructure investments**

Action Items

- Establish a formal process for coordinating committee input with participating jurisdictions’ CIP-generating agencies.
- Define and prioritize specific infrastructure investments needed to support full implementation of the Spaceport program.

- Support planning and funding of other regionally significant infrastructure investments in the region, including (as examples):
  - Port of Entry (border) expansion
  - City of San Luis (Yuma County) wastewater treatment capacity
  - City of San Luis (Yuma County) Avenue B corridor improvements (allowing for development of border retail, etc.)
  - Quartzsite (La Paz County) Highway 95 connection to Interstate 10 to facilitate needed industrial development
  - Quartzsite (La Paz County) expanded naturalist gas capacity to accommodate industrial development
  - Arizona Public Service (APS) solar facility investments (in both counties) to expand energy capacity and make the region more attractive for future residential, commercial and industrial development

**Strategy 5B: Coordinate with local jurisdictions (cities and counties) to update list of “candidate” CEDS projects**

Action Items

- As part of CEDS Annual Performance reporting, provide annual guidance on defining local infrastructure projects that are strong candidates for EDA grant funding.
- Develop online portal to allow local jurisdictions to nominate projects to be included in the annual-updated CEDS project list.

**Goal 6 – Enhance region’s overall image as a high-quality place to live, work, play, and invest**

**Strategy 6A: Launch regional (two-county) marketing campaign aimed at raising national awareness and improving external perceptions of the region**

Action Items

- Within GYEDC’s current process of developing a new marketing campaign for Yuma County, identify opportunities to promote the Colorado River Region (collectively) while still maintaining appropriate distinctions between the two counties.
- Develop collateral materials specific to the Colorado River Region branding and marketing objectives.

**Strategy 6B: Facilitate placemaking investments and other high-profile “quality of place” initiatives**

Action Items

- Actively support necessary zoning changes and infrastructure investment for the planned Yuma Innovation District / Innovation Hub.

- Define priorities for other regionally significant placemaking initiatives consistent with the Strategy 3B/3C focus on attracting visitor-serving amenities.

## **Goal 7 – Expand the region’s economic resilience**

### **Strategy 7A: Prepare annual memorandum report demonstrating the relationship between implementation actions and resilience issues**

#### **Action Items**

- Track progress on regional (partner) initiatives which have a nexus to the topic of economic resilience.
- Track evolution of federal government (EDA) prioritization of resiliency issues and adapt annual reporting format to align with current policy.
- Identify and document opportunities to leverage regional economic development initiatives to also achieve sustainability and resiliency objectives.



## 8. Economic Resilience

The Economic Development Administration (EDA) defines Economic Resilience as the ability for a region to anticipate, withstand and recover from various shocks, disruptions or economic stresses it may experience.

The following table includes summaries of programs addressing resilience identified by representatives of Yuma and La Paz Counties, together with associated documentation and other resilience-related strategies or observations within those documents/webpages.

| Program   | Related Documents/Webpages   | Related Strategies and/or Other Salient Points   |
|---|--|--|
| <b>Yuma</b>   |  |  |
| <b>Local</b>  |  |  |
| <p><i>Emergency Preparedness and Response</i></p> <p>The Public Health Emergency Preparedness and Response (PHEPR) program in Yuma County emphasizes planning, training, exercises, education, operational readiness, and public outreach. PHEPR is funded by the Center for Disease Control (CDC) through an Arizona Department of Public Health Services grant. The program intent is to increase capacity to respond to events that could range from:</p> <ul style="list-style-type: none"> <li>• Natural Disasters</li> <li>• Disease Outbreaks</li> <li>• Bioterrorism Events</li> <li>• Chemical Terrorism Events</li> </ul> | <p>Webpages at <a href="https://www.yumacountyaz.gov/government/health-district/divisions/emergency-preparedness-program?utm_source=chatgpt.com">https://www.yumacountyaz.gov/government/health-district/divisions/emergency-preparedness-program?utm_source=chatgpt.com</a></p> | <p>The Emergency Preparedness webpages include instructions to residents about family-level and business and institutional preparations and actions related to emergencies, including contingency and communication plans, emergency supplies, and sources of information.</p> |
| <p><i>Environmental and Sustainability Initiatives</i></p> <p>This multiyear Brownfields project, which involved multiple public workshops and other engagements, ultimately resulted in a vision for redevelopment of underutilized and idle properties throughout the Yuma and San Luis communities, with the intent to bring added value, critical</p>   | <p>Yuma Coalition Brownfields Assessment webpage: <a href="https://storymaps.arcgis.com/stories/7be9b403cdcd42efa94370b3e5e19bcb">https://storymaps.arcgis.com/stories/7be9b403cdcd42efa94370b3e5e19bcb</a></p>  | <p>Webpages include project history and timeline, along with instructions for how residents can stay informed.</p>   |

| Program   | Related Documents/Webpages  | Related Strategies and/or Other Salient Points  |
|---|---|---|
| infrastructure and increased quality of life to these locations.  |   |   |
|   |   |   |
| <b>State programs, applied locally</b>  |   |   |
| <p><i>Extreme Heat Preparedness</i></p> <p>The Yuma County Public Health Services District (YCPHSD) collaborates with the Arizona Department of Health Services (ADHS) and Arizona State University to evaluate and improve the effectiveness of cooling centers, which provide refuge during high-temperature periods and can reduce heat-related illnesses and fatalities. The project is addressing multiple challenges, including varying capacities/capabilities of the NPOs that are the de facto operators of cooling centers, homeless populations that are largely unaware of the presence of facilities and the dangers of heat exposure, and other issues.</p> | <p><i>Addendum to the 2017 State of Arizona Climate and Health Adaptation Plan (ACHAP), Arizona Department of Health Services, 2018.</i></p> <p>The document refers to other relevant published material, including: 1) <i>The Fourth National Climate Assessment</i> (NCA 4, 2018), which summarized climate impacts for the Southwest and to health, including the implications of extreme heat, poor air quality, and changes in conditions that foster the spread of infectious pathogens; 2) 2 ADHS reports in 2017 on a) <i>Assessment of Climate and Health Impacts on Vector-Borne Diseases and Valley Fever in Arizona</i>, and b) <i>Projections of Climate Impacts on Vector-Borne Diseases and Valley Fever in Arizona</i>.</p> | <p>The point of this document was to have stakeholders contribute “success stories” detailing how organizations achieved desired results, so that other jurisdictions and groups could be informed about implementing effective adaptation actions to counter future extreme weather challenges.</p>  |
| <p><i>Water Resource Management</i></p> <p>Reliance on Colorado River water encourages particular attention to challenges associated with drought. The 2019 Drought Contingency Plan (DCP) was formulated to mitigate impacts from reductions in Colorado River water usage through conservation measures aligned with declining</p>  | <p>Water Resource Research Center, <i>Arizona Water Factsheet</i>. The 4-page Factsheet for Yuma County (November 2023) informs lay audiences about the County’s sources, uses, and regulatory and other aspects of water management, including challenges of</p>   | <p>From <i>Factsheet</i>: “Despite uncertainty about future rainfall, runoff, and snow pack further upstream at the headwaters of the Colorado River, local drought plans can define responses to these changing conditions. . . [although] proximity to the highly regulated Colorado River greatly impairs the County’s ability to plan for its long-</p> |

| Program  | Related Documents/Webpages   | Related Strategies and/or Other Salient Points   |
|--|--|--|
| <p>water levels. This includes ongoing improvements in crop and irrigation management (the Contingency Plan itself does not appear to be available; current documents related to drought contingency and the Colorado River are referenced in the second column).</p>  | <p>contamination, declining supply from the Colorado River and aquifer, etc., and provides links to other state and local sources of relevant information.</p> <p>Other relevant documents relating to drought and the Colorado River are: 1) <i>Agreement Concerning Colorado River Drought Contingency Management And Operations</i> (2019), to which multiple states, federal agencies, and water districts were a party, and 2) a fact sheet related to the Drought Contingency Plan (DCP) produced by the Central Arizona Project (CAP) and designed to help the lay public understand Colorado River management challenges and other issues.</p> | <p>term sustainability and growth based on vital water resources. Yuma County water users maintain mostly higher-priority entitlements to Colorado River water and have not been impacted by current federal shortage declarations. However, future reductions and worsening drought will affect the area’s crop production. It is likely that some agricultural land will cease production through fallowing either temporarily or permanently.”</p> <p>From CAP Factsheet: “As the impact of poor hydrology continues, the DCP is adaptive to respond to worsening conditions, buying time to identify additional actions as needs dictate.”</p> |
| <p><i>State-Level Climate Action</i></p> <p>The <i>Clean Arizona Plan</i> outlines measures to improve air quality and reduce greenhouse gas emissions statewide. Prioritized actions include expanding access to weatherization, energy efficiency upgrades, electrification, and support for renewable energy projects. The document includes a summary of public input from Yuma, within which a number of issues were expressed, including challenges of adopting solar technology, allocation of funding resources to areas with people that need it most, the fact that the international border complicates</p> | <p><i>The Clean Arizona Plan, Priority Climate Action Plan, State of Arizona</i>, Prepared by Arizona State University and Northern Arizona University for the Arizona Governor’s Office of Resiliency</p>   | <p>Measures outlined in the <i>Clean Arizona Plan</i> address:</p> <p><u>For the building sector:</u> M1. Expand access to weatherization, energy efficiency upgrades, etc.; M2. Support municipalities and communities in adopting updated building energy codes.</p> <p><u>For the electricity sector:</u> M3. Deploy solar-plus-battery systems; M4. Implement on-site renewables generation and battery storage at public higher-education facilities; M5. Resilient energy for local government facilities.</p> <p><u>For workforce development:</u> M6. Create a clean-tech workforce.</p>   |

| Program  | Related Documents/Webpages   | Related Strategies and/or Other Salient Points   |
|--|--|--|
| regional progress on pollution improvement, etc.   |  | <p><u>For transportation:</u> M7. Enable zero-emission fleets; M8. Electrified public fleets; M9. Expand electrical vehicle charging facilities; M10. Improved roads in rural/tribal communities; M11. Clean I-40 transportation corridor (electrified and other low-emission trucks).</p> <p><u>For waste, water, and sustainable materials sectors:</u> M12. Innovative solutions to reduce greenhouse gas emissions and air pollution from waste materials.</p> <p>The document contains a wide spectrum of climate-impact-related data, at the county level, and so includes data for Yuma County.</p> |
|  |  |  |
| <b>La Paz</b>  |  |  |
| <b>Local</b>   |  |  |
| <p><i>Environmental Education and Conservation</i></p> <p>The University of Arizona's Cooperative Extension in La Paz County offers programs to increase community awareness of best-management practices for water use and quality. These initiatives focus on both youth and underserved areas, emphasizing sustainable water management practices. The two programs associated with this initiative are: 1) The Water Management/Conservation Program, which is intended to increase community awareness of best management practices for indoor and outdoor water use, and includes Master Gardener programs; and 2) The Water Quality Program, directed</p> | <p>Water Resources Education Assessment webpage: <a href="https://www.fs.usda.gov/rm/boise/AWAE/labs/awae_flagstaff/watersheds/programs/lapazprograms.html?utm_source=chatgpt.com">https://www.fs.usda.gov/rm/boise/AWAE/labs/awae_flagstaff/watersheds/programs/lapazprograms.html?utm_source=chatgpt.com</a></p> | <p>An evaluation of these programs concluded that the key to effective community outreach for them is person-to-person communication and follow-up, and also an aggressive marketing effort.</p>   |

| Program   | Related Documents/Webpages   | Related Strategies and/or Other Salient Points  |
|---|--|---|
| <p>primarily at onsite water treatment systems (e.g. septic tanks and drain fields). Programs included production of a number of related informational materials.</p>   |  |   |
| <p><i>Hazard Mitigation Planning</i></p> <p>This multi-jurisdictional plan aims to protect health, safety, property, and the environment by identifying and reducing vulnerabilities to natural hazards through cost-effective and sustainable efforts. The plan assessed the risks from dam failure, flooding, drought, wildfire, severe wind, and hazardous materials, the capacity/capability to respond to these threats, and how to work with and supplement these resources to further mitigate risk.</p>                                       | <p><i>2020 La Paz County Adopted Multi-Jurisdictional Hazard Mitigation Plan</i></p>   | <p>Recommended strategies in the Plan include education, strengthening codes and regulations, producing additional targeted plans, providing supplemental facilities for vulnerable population, augmenting energy resiliency, flood mitigation projects, etc.</p>   |
| <p><b>State programs, applied locally</b></p>   |  |   |
| <p><i>Drought Contingency Planning</i></p> <p>Two aspects related to drought contingency planning in the County include 1) the 2019 Drought Contingency Plan (DCP) developed to address potential shortages of Colorado River water, which included mitigating impacts on water usage within the County;<sup>4</sup> and 2) Groundwater Monitoring, in which La Paz County has been monitoring groundwater extraction to ensure sustainable use of water resources, recognizing the challenges posed by increased groundwater usage, particularly</p> | <p>Water Resource Research Center</p> <p>(Please see discussion about this and other drought contingency documents in the section on Yuma County, above)</p> | <p>From: <i>Arizona Water Factsheet for La Paz County</i> (Oct. 2023).</p> <p>“Rapidly declining groundwater levels due to decades of overuse, drought, and the rapid expansion of large-scale agriculture affect rural communities in La Paz County. Current groundwater levels are below the drilled depth of many residential wells. . . .</p> <p>Because the Colorado River Indian Tribes (CRIT) hold a first priority Colorado River water entitlement, their recent authority to lease, exchange, and store currently unused water with a history of use presents an opportunity for off-</p> |

<sup>4</sup> See discussion related to this document in the Yuma section of the table, preceding.

| Program   | Related Documents/Webpages   | Related Strategies and/or Other Salient Points   |
|---|--|--|
| from large-scale farming operations.  |  | <p>reservation water users in Arizona. . . This water supply will help to mitigate future imbalances between supply and demand.” However, the effects of this authority on La Paz County specifically would seem to be somewhat uncertain.</p> <p>Other issues addressed in the <i>Factsheet</i> include: contamination at the U.S. Army Yuma Proving Ground, surface water impairment in the Bill Williams River and Alamo Lake, and ongoing salinity management efforts in the Colorado River basin.</p> |
| <p><i>State-Level Climate Action</i></p> <p>At the state level, the <i>Clean Arizona Plan</i> outlines priority climate actions, including expanding access to weatherization, energy efficiency upgrades, and electrification. Plan implementation at the state level should also support local efforts to enhance climate resilience.</p> | <p><i>The Clean Arizona Plan, Priority Climate Action Plan, State of Arizona</i>, Prepared by Arizona State University and Northern Arizona University for the Arizona Governor’s Office of Resiliency</p> | <p>(See discussion related to Yuma County, preceding)</p> <p>The document contains a wide spectrum of climate-impact related data, at the county level, and so includes data for La Paz County</p>   |
|   |  |  |

Resilience-related strategies within the region occur in other contexts as well, including the following documents:

- The in-progress La Paz General Plan update
- City of Yuma Intelligent Transportation Systems Strategic Plan
- City of Yuma Traffic Operations Center Concept of Operations
- City of Yuma storm water drainage website

## 9. Evaluation Framework

The table on the next two pages outlines the metrics (and narrative documentation) that will be utilized to evaluate implementation of the CEDS in future years (in the Annual Performance Reports to be submitted to EDA).

| Goal  | Strategy  | Metric to be Tracked                                  | Narrative Documentation      |
|---|---|---|------------------------------|
| <b>Goal 1 – Create high-paying employment opportunities through robust business retention/expansion/attraction programming focused on the region’s core industry clusters</b> | <b>Strategy 1A: Launch business attraction campaign for the two-county region</b>   | # of firms/jobs attracted                             |                              |
|   | <b>Strategy 1B: Expand business retention/expansion (BRE) outreach and strengthen business assistance resources (focusing on firms in high-priority, regionally significant industry clusters)</b>  | # of firms assisted<br><br># of jobs retained/created |                              |
|   | <b>Strategy 1C: Develop regional business attraction incentives to supplement local (city, county) offerings</b>  |   | Progress memo                |
|   | <b>Strategy 1D: Develop priorities and action plan to improve the region’s business friendliness and development capacity</b>   |   | Progress memo                |
|   | <b>Strategy 1A: Launch business attraction campaign for the two-county region</b>   |   | Progress memo                |
| <b>Goal 2 – Attract innovation investment and strengthen business startup ecosystem through “game-changing” initiatives currently being launched in the region</b>            | <b>Strategy 2A: Aggressively secure resources and initiate implementation of the Yuma Spaceport concept</b>   | \$ value of grants awarded                            | Status of grant applications |
|   | <b>Strategy 2B: Focus regional resources and political support around the Elevate Southwest initiative</b>  |   | Progress memo                |
|   | <b>Strategy 2C: Establish regional entrepreneurial development consortium to provide “one stop” point of access to business startup resources offered by partner organizations</b>                  | # of startups accessing consortium resources          | Progress memo                |
| <b>Goal 3 – Promote the region as a destination for sustainable tourism (including agritourism) and outdoor recreation</b>  | <b>Strategy 3A: Launch regional marketing and branding initiative to promote “Arizona’s Colorado River Region” as destination</b>   | \$ investment in marketing                            | Progress memo                |
|   | <b>Strategy 3B: Target attraction of major visitor-serving facilities (e.g., hotels, sports venues, etc.)</b>   | # of projects attracted; \$ value                     | Progress memo                |
|   | <b>Strategy 3C: Establish regional (two-county) tourism consortium to identify shared market opportunities and prioritize investment in visitor amenities that are regional in scale and impact</b> | \$ value of public investment                         | Progress memo                |
| <b>Goal 4 – Leverage region’s educational institutions and</b>  | <b>Strategy 4A: Coordinate on an annual basis (or more frequently as needed) with county-level Workforce Development Boards and</b>   |   | Progress memo                |



| Goal   | Strategy   | Metric to be Tracked                                   | Narrative Documentation |
|--|--|--|-------------------------|
| workforce development resources to maximize connection between resident workforce and emerging job opportunities | educational institutions to ensure capacity and prioritization of training programs relevant to needs of targeted/emerging industries  |  |                         |
|  | Strategy 4B: Leverage partnerships with organizations/initiatives (e.g., Elevate Southwest) that can serve as conduits between firms in high-priority industries and workforce development resources |  | Progress memo           |
| Goal 5 – Prioritize investments in infrastructure critical to the growth of targeted industry clusters           | Strategy 5A: Convene CEDS Strategy Committee twice annually to identify and prioritize needed regional infrastructure investments  |  | Progress memo           |
|  | Strategy 5B: Coordinate with local jurisdictions (cities and counties) to update list of “candidate” CEDS projects   | # of projects added to CEDS list<br># of jurisdictions | Progress memo           |
| Goal 6 – Enhance region’s overall image as a high-quality place to live, work, play, and invest                  | Strategy 6A: Launch regional (two-county) marketing campaign aimed at raising national awareness and improving external perceptions of the region  | \$ investment in marketing                             | Progress memo           |
|  | Strategy 6B: Facilitate placemaking investments and other high-profile “quality of place” initiatives  |  | Progress memo           |
| Goal 7 – Expand the region’s economic resilience   | Strategy 7A: Prepare annual memorandum report demonstrating the relationship between implementation actions and resilience issues  |  | Progress memo           |

## 10. Candidate CEDS Projects

### Project nomination process

A key element of this CEDS is a list of “candidate projects” for potential future grant applications to the U.S. Economic Development Administration (EDA). CRR jurisdictions and qualifying nonprofit organizations were invited to submit projects to be included on this list. Submitting entities were asked to provide the following information about nominated projects:

- Total estimated project cost
- Estimated amount and source of local share of project cost
- Project description and elements
- Jurisdiction’s level of site control for the proposed project site
- Anticipated timeline for project completion (pending availability of funding)
- Status of any required environmental clearance(s)
- Estimated job creation
- Estimated private investment that project would attract

Based on this screening process, the following projects have been included in this CEDS:

| Nominating Agency | Project Name/Description               | Estimated Total Cost | Identified Local Share | Potential EDA Assistance Requested |
|-------------------|--|----------------------|------------------------|------------------------------------|
| City of San Luis  | Downtown San Luis Redevelopment Design | \$500,000            | \$0                    | \$500,000                          |

## Appendix A: Census Data (Qualifying Census Tracts)

The tables below provide the latest available Census (ACS) data to identify the individual census tracts within the Colorado River Region that would potentially qualify for EDA investment based on unemployment rates and per capita income levels. These tables reflect the following qualifying criteria:

- 24-month unemployment rate is at least one percentage point greater than the national average unemployment rate
- Per capita income is not more than 80% of the national average per capita income

### National Outlook

| National Outlook          |              |                           |                 |
|---------------------------|--------------|---------------------------|-----------------|
| Unemployment              |              | Per Capita                |                 |
| 2022                      | 4.30%        | 2022                      | \$41,804        |
| 2023                      | 4.30%        | 2023                      | \$43,313        |
| <b>24 - Month Average</b> | <b>4.30%</b> | <b>24 - Month Average</b> | <b>\$42,559</b> |

| Arizona                   |              |                           |                 |
|---------------------------|--------------|---------------------------|-----------------|
| Unemployment              |              | Per Capita                |                 |
| 2022                      | 4.30%        | 2022                      | \$39,819        |
| 2023                      | 4.30%        | 2023                      | \$41,290        |
| <b>24 - Month Average</b> | <b>4.30%</b> | <b>24 - Month Average</b> | <b>\$40,555</b> |

| County of Yuma County     |              |                           |                 |
|---------------------------|--------------|---------------------------|-----------------|
| Unemployment              |              | Per Capita                |                 |
| 2022                      | 6.20%        | 2022                      | \$27,331        |
| 2023                      | 6.80%        | 2023                      | \$28,193        |
| <b>24 - Month Average</b> | <b>6.50%</b> | <b>24 - Month Average</b> | <b>\$27,762</b> |

| County of La Paz County   |               |                           |                 |
|---------------------------|---------------|---------------------------|-----------------|
| Unemployment              |               | Per Capita                |                 |
| 2022                      | 10.70%        | 2022                      | \$30,399        |
| 2023                      | 10.80%        | 2023                      | \$33,413        |
| <b>24 - Month Average</b> | <b>10.75%</b> | <b>24 - Month Average</b> | <b>\$31,906</b> |

Notes:

1. All figures above are taken from the 2022 and 2023 American Community Survey 1-Year Estimates except La Paz County which are taken from 2022 and 2023 American Community Survey 5-Year Estimates due to availability.

Source: U.S. Census, 2022 and 2023 American Community Survey 1-Year and 5-Year Estimates.

### Incorporated Cities within La Paz County

| Name of City       |
|--------------------|
| Town of Parker     |
| Town of Quartzsite |

Source: U.S. Census, 2019-2023 American Community Survey 5-Year Estimates.

**Incorporated Cities within Yuma County**

| Name of City     | Population |
|------------------|------------|
| City of San Luis | 35,998     |
| City of Somerton | 14,383     |
| Town of Wellton  | 2,470      |
| City of Yuma     | 98,461     |

Source: U.S. Census, 2019-2023 American Community Survey 5-Year Estimates.

**Incorporated Cities within La Paz County and Yuma County**

| U.S.       |             |              |       |            |          |
|------------|-------------|--------------|-------|------------|----------|
| Population |             | Unemployment |       | Per Capita |          |
| 2023       | 332,387,540 | 2023         | 5.20% | 2023       | \$43,289 |

| Parker     |       |              |       |            |          |
|------------|-------|--------------|-------|------------|----------|
| Population |       | Unemployment |       | Per Capita |          |
| 2023       | 3,379 | 2023         | 5.60% | 2023       | \$40,377 |

| Quartzsite |       |              |        |            |          |
|------------|-------|--------------|--------|------------|----------|
| Population |       | Unemployment |        | Per Capita |          |
| 2023       | 1,805 | 2023         | 55.10% | 2023       | \$25,405 |

| San Luis   |        |              |        |            |          |
|------------|--------|--------------|--------|------------|----------|
| Population |        | Unemployment |        | Per Capita |          |
| 2023       | 35,998 | 2023         | 10.80% | 2023       | \$17,936 |

| Somerton   |        |              |       |            |          |
|------------|--------|--------------|-------|------------|----------|
| Population |        | Unemployment |       | Per Capita |          |
| 2023       | 14,383 | 2023         | 5.10% | 2023       | \$22,812 |

| Wellton    |       |              |       |            |          |
|------------|-------|--------------|-------|------------|----------|
| Population |       | Unemployment |       | Per Capita |          |
| 2023       | 2,470 | 2023         | 0.90% | 2023       | \$31,639 |

| Yuma       |        |              |       |            |          |
|------------|--------|--------------|-------|------------|----------|
| Population |        | Unemployment |       | Per Capita |          |
| 2023       | 98,461 | 2023         | 7.50% | 2023       | \$32,469 |

Source: U.S. Census, 2019-2023 American Community Survey 5-Year Estimates.

## Qualifying Census Tracts

### Census Tracts within La Paz County

| U.S.                | Unemployment<br>5.2% | Per Capita<br>Income<br>\$43,289 | 24 month<br>unemployment<br>rate is at least 1%<br>point greater than<br>the nat'l average<br>unemployment | The per capita<br>income (PCI) is not<br>more than 80% of<br>the national<br>average PCI. |
|---------------------|----------------------|----------------------------------|--|---|
| Census Tract        | Unemployment         | Per Capita                       | Qualifying   | Qualifying  |
| Census Tract 201.01 | 7.8%                 | \$25,958                         | TRUE   | TRUE  |
| Census Tract 201.02 | 0.0%                 | \$57,762                         | FALSE  | FALSE   |
| Census Tract 202.01 | 5.7%                 | \$35,844                         | TRUE   | FALSE   |
| Census Tract 202.02 | 9.2%                 | \$44,422                         | TRUE   | FALSE   |
| Census Tract 205.01 | 5.8%                 | \$38,601                         | TRUE   | FALSE   |
| Census Tract 205.03 | 64.7%                | \$22,278                         | TRUE   | TRUE  |
| Census Tract 205.04 | 0.0%                 | \$30,142                         | FALSE  | TRUE  |
| Census Tract 205.05 | 2.4%                 | \$41,113                         | FALSE  | FALSE   |
| Census Tract 206.02 | 9.4%                 | \$18,526                         | TRUE   | TRUE  |
| Census Tract 9402   | 5.6%                 | \$40,377                         | TRUE   | FALSE   |
| Census Tract 9403   | 9.9%                 | \$25,263                         | TRUE   | TRUE  |
| Census Tract 9800   | 0.0%                 | \$0                              | FALSE  | TRUE  |

Source: U.S. Census, 2019-2023 American Community Survey 5-Year Estimates.

### Census Tracts within Yuma County

| U.S.              | Unemployment<br>5.2% | Per Capita<br>Income<br>\$43,289 | 24 month<br>unemployment<br>rate is at least 1%<br>point greater than<br>the nat'l average<br>unemployment | The per capita<br>income (PCI) is not<br>more than 80% of<br>the national<br>average PCI. |
|-------------------|----------------------|----------------------------------|--|---|
| Census Tract      | Unemployment         | Per Capita                       | Qualifying   | Qualifying  |
| Census Tract 1    | 18.9%                | \$17,359                         | TRUE   | TRUE  |
| Census Tract 2    | 6.7%                 | \$22,234                         | TRUE   | TRUE  |
| Census Tract 3.01 | 17.2%                | \$18,490                         | TRUE   | TRUE  |
| Census Tract 3.02 | 15.3%                | \$27,716                         | TRUE   | TRUE  |
| Census Tract 4.02 | 4.6%                 | \$23,505                         | FALSE  | TRUE  |
| Census Tract 4.03 | 5.0%                 | \$26,391                         | FALSE  | TRUE  |
| Census Tract 4.04 | 15.8%                | \$20,554                         | TRUE   | TRUE  |
| Census Tract 5.01 | 2.0%                 | \$33,613                         | FALSE  | TRUE  |
| Census Tract 5.02 | 2.6%                 | \$29,562                         | FALSE  | TRUE  |
| Census Tract 6    | 8.7%                 | \$24,206                         | TRUE   | TRUE  |
| Census Tract 7    | 15.0%                | \$19,827                         | TRUE   | TRUE  |
| Census Tract 8    | 13.5%                | \$46,121                         | TRUE   | FALSE   |
| Census Tract 9.01 | 1.2%                 | \$42,787                         | FALSE  | FALSE   |
| Census Tract 9.02 | 1.6%                 | \$30,744                         | FALSE  | TRUE  |

| U.S.                | Unemployment<br>5.2% | Per Capita<br>Income<br>\$43,289 | 24 month<br>unemployment<br>rate is at least 1%<br>point greater than<br>the nat'l average<br>unemployment | The per capita<br>income (PCI) is not<br>more than 80% of<br>the national<br>average PCI. |
|---------------------|----------------------|----------------------------------|--|---|
| Census Tract 9.03   | 3.3%                 | \$45,571                         | FALSE  | FALSE   |
| Census Tract 9.07   | 4.9%                 | \$31,810                         | FALSE  | TRUE  |
| Census Tract 9.08   | 4.3%                 | \$46,156                         | FALSE  | FALSE   |
| Census Tract 9.09   | 13.6%                | \$27,486                         | TRUE   | TRUE  |
| Census Tract 9.10   | 10.9%                | \$38,864                         | TRUE   | FALSE   |
| Census Tract 10.01  | 3.3%                 | \$43,876                         | FALSE  | FALSE   |
| Census Tract 10.03  | 2.1%                 | \$27,218                         | FALSE  | TRUE  |
| Census Tract 10.04  | 5.9%                 | \$18,651                         | TRUE   | TRUE  |
| Census Tract 11     | 6.7%                 | \$27,098                         | TRUE   | TRUE  |
| Census Tract 12     | 3.2%                 | \$30,091                         | FALSE  | TRUE  |
| Census Tract 109.07 | 6.5%                 | \$39,336                         | TRUE   | FALSE   |
| Census Tract 109.10 | 6.3%                 | \$34,073                         | TRUE   | TRUE  |
| Census Tract 109.11 | 8.3%                 | \$36,575                         | TRUE   | FALSE   |
| Census Tract 109.13 | 8.3%                 | \$27,532                         | TRUE   | TRUE  |
| Census Tract 109.14 | 13.6%                | \$37,943                         | TRUE   | FALSE   |
| Census Tract 109.15 | 7.1%                 | \$32,291                         | TRUE   | TRUE  |
| Census Tract 109.16 | 33.3%                | \$18,448                         | TRUE   | TRUE  |
| Census Tract 110    | 17.3%                | \$28,460                         | TRUE   | TRUE  |
| Census Tract 111.07 | 5.6%                 | \$49,083                         | TRUE   | FALSE   |
| Census Tract 111.08 | 3.3%                 | \$36,173                         | FALSE  | FALSE   |
| Census Tract 111.12 | 0.2%                 | \$37,998                         | FALSE  | FALSE   |
| Census Tract 111.14 | 6.5%                 | \$30,506                         | TRUE   | TRUE  |
| Census Tract 111.16 | 6.7%                 | \$35,581                         | TRUE   | FALSE   |
| Census Tract 111.17 | 8.8%                 | \$25,774                         | TRUE   | TRUE  |
| Census Tract 111.18 | 0.0%                 | \$27,974                         | FALSE  | TRUE  |
| Census Tract 111.19 | 6.2%                 | \$35,439                         | TRUE   | FALSE   |
| Census Tract 111.20 | 6.6%                 | \$39,995                         | TRUE   | FALSE   |
| Census Tract 111.21 | 1.6%                 | \$31,936                         | FALSE  | TRUE  |
| Census Tract 111.22 | 23.8%                | \$21,927                         | TRUE   | TRUE  |
| Census Tract 111.23 | 16.9%                | \$31,186                         | TRUE   | TRUE  |
| Census Tract 111.24 | 14.5%                | \$31,117                         | TRUE   | TRUE  |
| Census Tract 111.25 | 0.0%                 | \$41,002                         | FALSE  | FALSE   |
| Census Tract 112.02 | 7.9%                 | \$29,208                         | TRUE   | TRUE  |
| Census Tract 112.03 | 0.0%                 | \$24,537                         | FALSE  | TRUE  |
| Census Tract 112.04 | 3.3%                 | \$46,772                         | FALSE  | FALSE   |
| Census Tract 114.03 | 6.7%                 | \$20,165                         | TRUE   | TRUE  |
| Census Tract 114.05 | 10.4%                | \$19,987                         | TRUE   | TRUE  |
| Census Tract 114.07 | 14.2%                | \$19,188                         | TRUE   | TRUE  |
| Census Tract 114.08 | 7.9%                 | \$22,401                         | TRUE   | TRUE  |
| Census Tract 115.01 | 9.3%                 | \$19,535                         | TRUE   | TRUE  |

| U.S.                 | Unemployment<br>5.2% | Per Capita<br>Income<br>\$43,289 | 24 month<br>unemployment<br>rate is at least 1%<br>point greater than<br>the nat'l average<br>unemployment | The per capita<br>income (PCI) is not<br>more than 80% of<br>the national<br>average PCI. |
|----------------------|----------------------|----------------------------------|--|---|
| Census Tract 115.03  | 8.7%                 | \$20,902                         | TRUE   | TRUE  |
| Census Tract 115.05  | 2.5%                 | \$22,702                         | FALSE  | TRUE  |
| Census Tract 115.06  | 3.8%                 | \$25,017                         | FALSE  | TRUE  |
| Census Tract 116.01  | 10.7%                | \$14,063                         | TRUE   | TRUE  |
| Census Tract 116.02  | 20.0%                | \$16,908                         | TRUE   | TRUE  |
| Census Tract 117     | 8.6%                 | \$55,276                         | TRUE   | FALSE   |
| Census Tract 118.01  | 6.0%                 | \$21,487                         | TRUE   | TRUE  |
| Census Tract 118.02  | 10.6%                | \$21,771                         | TRUE   | TRUE  |
| Census Tract 121     | 8.0%                 | \$33,587                         | TRUE   | TRUE  |
| Census Tract 9800.03 | 0.0%                 | \$0                              | FALSE  | TRUE  |
| Census Tract 9800.04 | 0.0%                 | \$0                              | FALSE  | TRUE  |
| Census Tract 9800.05 | 0.0%                 | \$27,664                         | FALSE  | TRUE  |
| Census Tract 9800.06 | 7.2%                 | \$28,544                         | TRUE   | TRUE  |

Source: U.S. Census, 2019-2023 American Community Survey 5-Year Estimates.

## Appendix B: Employment Trends by Major Industry

TABLE B-1. LA PAZ COUNTY LOCATION QUOTIENTS, 2022

| NAICS               | Description  | La Paz County |             | AZ               |             | La Paz County LQ's<br>Relative to:<br>AZ |
|---------------------|--|---------------|-------------|------------------|-------------|--|
|                     |  | 2022 #        | La Paz      | 2023 #           | AZ          |  |
| 21                  | Mining, Quarrying, and Oil and Gas Extraction                            | 17            | 0%          | 12,063           | 0%          | 0.75                                     |
| 22                  | Utilities  | 25            | 0%          | 20,820           | 1%          | 0.64                                     |
| 55                  | Management of Companies and Enterprises                                  | 1             | 0%          | 42,176           | 1%          | 0.01                                     |
| 71                  | Arts, Entertainment, and Recreation                                      | 314           | 6%          | 59,771           | 2%          | 2.78                                     |
| 51                  | Information  | 29            | 1%          | 53,419           | 2%          | 0.29                                     |
| 61                  | Educational Services   | 452           | 8%          | 236,822          | 8%          | 1.01                                     |
| 53                  | Real Estate and Rental and Leasing                                       | 97            | 2%          | 60,655           | 2%          | 0.85                                     |
| 42                  | Wholesale Trade  | 154           | 3%          | 107,392          | 4%          | 0.76                                     |
| 48                  | Transportation and Warehousing   | 79            | 1%          | 135,331          | 4%          | 0.31                                     |
| 52                  | Finance and Insurance  | 49            | 1%          | 180,862          | 6%          | 0.14                                     |
| 54                  | Professional, Scientific, and Technical Services                         | 31            | 1%          | 178,768          | 6%          | 0.09                                     |
| 81                  | Other Services (except Public Administration)                            | 72            | 1%          | 82,306           | 3%          | 0.46                                     |
| 31                  | Manufacturing  | 208           | 4%          | 179,790          | 6%          | 0.61                                     |
| 23                  | Construction   | 98            | 2%          | 196,763          | 7%          | 0.26                                     |
| 56                  | Administrative and Support and Waste Management and Remediation Services | 63            | 1%          | 252,307          | 8%          | 0.13                                     |
| 72                  | Accommodation and Food Services  | 722           | 13%         | 288,093          | 10%         | 1.33                                     |
| 44                  | Retail Trade   | 1,230         | 22%         | 349,015          | 12%         | 1.87                                     |
| 62                  | Health Care and Social Assistance  | 531           | 9%          | 434,403          | 14%         | 0.65                                     |
| 11                  | Agriculture, Forestry, Fishing and Hunting                               | 485           | 9%          | 23,507           | 1%          | 10.92                                    |
| 90                  | Government   | 1,045         | 18%         | 124,150          | 4%          | 4.46                                     |
| <b>Grand Totals</b> |  | <b>5,702</b>  | <b>100%</b> | <b>3,018,413</b> | <b>100%</b> |  |

Notes: NAICS = National Industrial Classification System

Source: U.S. Census Bureau, OnTheMap LEHD Origin-Destination Employment 2022; TNDG.



TABLE B-2. YUMA COUNTY LOCATION QUOTIENTS, 2023

| NAICS               | Description  | Yuma County   |             | AZ               |             | U.S.               |             | Yuma County LQ's Relative to: |       |
|---------------------|--|---------------|-------------|------------------|-------------|--------------------|-------------|-------------------------------|-------|
|                     |  | 2023 #        | Yuma        | 2023 #           | AZ          | 2023 #             | U.S.        | AZ                            | U.S.  |
| 21                  | Mining, Quarrying, and Oil and Gas Extraction                            | 54            | 0%          | 13,779           | 0%          | 591,454            | 0%          | 0.17                          | 0.19  |
| 22                  | Utilities  | 144           | 0%          | 12,266           | 0%          | 573,857            | 0%          | 0.50                          | 0.52  |
| 55                  | Management of Companies and Enterprises                                  | 327           | 0%          | 44,074           | 1%          | 2,541,795          | 1%          | 0.32                          | 0.27  |
| 71                  | Arts, Entertainment, and Recreation                                      | 386           | 0%          | 58,362           | 2%          | 2,976,118          | 2%          | 0.28                          | 0.27  |
| 51                  | Information  | 392           | 0%          | 54,702           | 2%          | 3,255,742          | 2%          | 0.30                          | 0.25  |
| 61                  | Educational Services   | 669           | 1%          | 87,391           | 3%          | 4,151,055          | 2%          | 0.33                          | 0.33  |
| 53                  | Real Estate and Rental and Leasing                                       | 953           | 1%          | 79,290           | 2%          | 3,024,950          | 2%          | 0.51                          | 0.66  |
| 42                  | Wholesale Trade  | 1,795         | 2%          | 116,755          | 3%          | 6,201,537          | 4%          | 0.65                          | 0.60  |
| 48                  | Transportation and Warehousing   | 2,159         | 3%          | 153,131          | 4%          | 7,453,927          | 4%          | 0.60                          | 0.60  |
| 52                  | Finance and Insurance  | 2,637         | 3%          | 192,215          | 6%          | 7,013,757          | 4%          | 0.58                          | 0.78  |
| 54                  | Professional, Scientific, and Technical Services                         | 2,707         | 3%          | 204,260          | 6%          | 12,140,230         | 7%          | 0.56                          | 0.46  |
| 81                  | Other Services (except Public Administration)                            | 3,204         | 4%          | 159,156          | 5%          | 8,405,241          | 5%          | 0.86                          | 0.79  |
| 31                  | Manufacturing  | 3,302         | 4%          | 201,169          | 6%          | 13,236,825         | 8%          | 0.70                          | 0.52  |
| 23                  | Construction   | 4,659         | 6%          | 243,292          | 7%          | 9,828,937          | 6%          | 0.81                          | 0.99  |
| 56                  | Administrative and Support and Waste Management and Remediation Services | 5,175         | 6%          | 277,722          | 8%          | 10,514,951         | 6%          | 0.79                          | 1.02  |
| 72                  | Accommodation and Food Services  | 7,004         | 9%          | 307,875          | 9%          | 14,125,041         | 8%          | 0.97                          | 1.03  |
| 44                  | Retail Trade   | 8,567         | 10%         | 360,188          | 10%         | 16,251,988         | 10%         | 1.01                          | 1.10  |
| 62                  | Health Care and Social Assistance  | 8,699         | 11%         | 449,506          | 13%         | 21,980,883         | 13%         | 0.82                          | 0.82  |
| 11                  | Agriculture, Forestry, Fishing and Hunting                               | 10,770        | 13%         | 24,433           | 1%          | 2,008,557          | 1%          | 18.76                         | 11.15 |
| 90                  | Government   | 18,490        | 23%         | 453,542          | 13%         | 24,462,825         | 14%         | 1.73                          | 1.57  |
| <b>Grand Totals</b> |  | <b>82,091</b> | <b>100%</b> | <b>3,493,106</b> | <b>100%</b> | <b>170,739,669</b> | <b>100%</b> |                               |       |

Notes: NAICS = National Industrial Classification System

Source: EMSI; TNDG.

TABLE B-3. YUMA COUNTY, PROJECTED EMPLOYMENT CHANGE BY INDUSTRY, 2023-2033

| Description                                      | 2023          |                  |                    | 2033          |                  |                    | 2023-2033 |            |            |
|--|---------------|------------------|--------------------|---------------|------------------|--------------------|-----------|------------|------------|
|  | Yuma          | AZ               | US                 | Yuma          | AZ               | US                 | Yuma      | AZ         | US         |
| Mining, Quarrying, and Oil and Gas Extraction    | 144           | 13,779           | 591,454            | 101           | 16,256           | 617,862            | -30%      | 18%        | 4%         |
| Agriculture, Forestry, Fishing and Hunting       | 10,770        | 24,433           | 2,008,557          | 9,302         | 22,195           | 2,094,338          | -14%      | -9%        | 4%         |
| Utilities  | 54            | 12,266           | 573,857            | 55            | 12,748           | 606,221            | 2%        | 4%         | 6%         |
| Professional, Scientific, and Technical Services | 18,490        | 204,260          | 12,140,230         | 19,052        | 231,627          | 14,043,912         | 3%        | 13%        | 16%        |
| Construction                                     | 392           | 243,292          | 9,828,937          | 412           | 283,578          | 10,547,669         | 5%        | 17%        | 7%         |
| Admin & Support & Waste Mgmt & Remed. Svcs       | 8,567         | 277,722          | 10,514,951         | 9,204         | 289,239          | 11,451,411         | 7%        | 4%         | 9%         |
| Wholesale Trade                                  | 953           | 116,755          | 6,201,537          | 1,048         | 126,396          | 6,517,508          | 10%       | 8%         | 5%         |
| Arts, Entertainment, and Recreation              | 7,004         | 58,362           | 2,976,118          | 7,830         | 67,026           | 3,391,025          | 12%       | 15%        | 14%        |
| Information                                      | 1,795         | 54,702           | 3,255,742          | 2,011         | 61,129           | 3,725,903          | 12%       | 12%        | 14%        |
| Manufacturing                                    | 386           | 201,169          | 13,236,825         | 433           | 225,392          | 14,061,838         | 12%       | 12%        | 6%         |
| Educational Services                             | 5,175         | 87,391           | 4,151,055          | 5,820         | 105,638          | 4,634,132          | 12%       | 21%        | 12%        |
| Finance and Insurance                            | 2,707         | 192,215          | 7,013,757          | 3,124         | 214,087          | 7,762,998          | 15%       | 11%        | 11%        |
| Health Care and Social Assistance                | 4,659         | 449,506          | 21,980,883         | 5,413         | 544,692          | 25,637,256         | 16%       | 21%        | 17%        |
| Government                                       | 8,699         | 453,542          | 24,462,825         | 10,203        | 479,411          | 25,935,099         | 17%       | 6%         | 6%         |
| Management of Companies and Enterprises          | 3,204         | 44,074           | 2,541,795          | 3,784         | 60,103           | 2,962,998          | 18%       | 36%        | 17%        |
| Real Estate and Rental and Leasing               | 2,159         | 79,290           | 3,024,950          | 2,694         | 88,804           | 3,342,842          | 25%       | 12%        | 11%        |
| Transportation and Warehousing                   | 669           | 153,131          | 7,453,927          | 841           | 181,898          | 8,669,760          | 26%       | 19%        | 16%        |
| Accommodation and Food Services                  | 3,302         | 307,875          | 14,125,041         | 4,168         | 343,799          | 15,385,498         | 26%       | 12%        | 9%         |
| Retail Trade                                     | 327           | 360,188          | 16,251,988         | 443           | 387,815          | 16,680,169         | 36%       | 8%         | 3%         |
| Other Services (except Public Administration)    | 2,637         | 159,156          | 8,405,241          | 3,708         | 173,877          | 9,010,145          | 41%       | 9%         | 7%         |
| <b>Grand Totals</b>                              | <b>82,091</b> | <b>3,493,106</b> | <b>170,739,669</b> | <b>89,646</b> | <b>3,915,708</b> | <b>187,078,584</b> | <b>9%</b> | <b>12%</b> | <b>10%</b> |

Source: EMSI; TNDG.

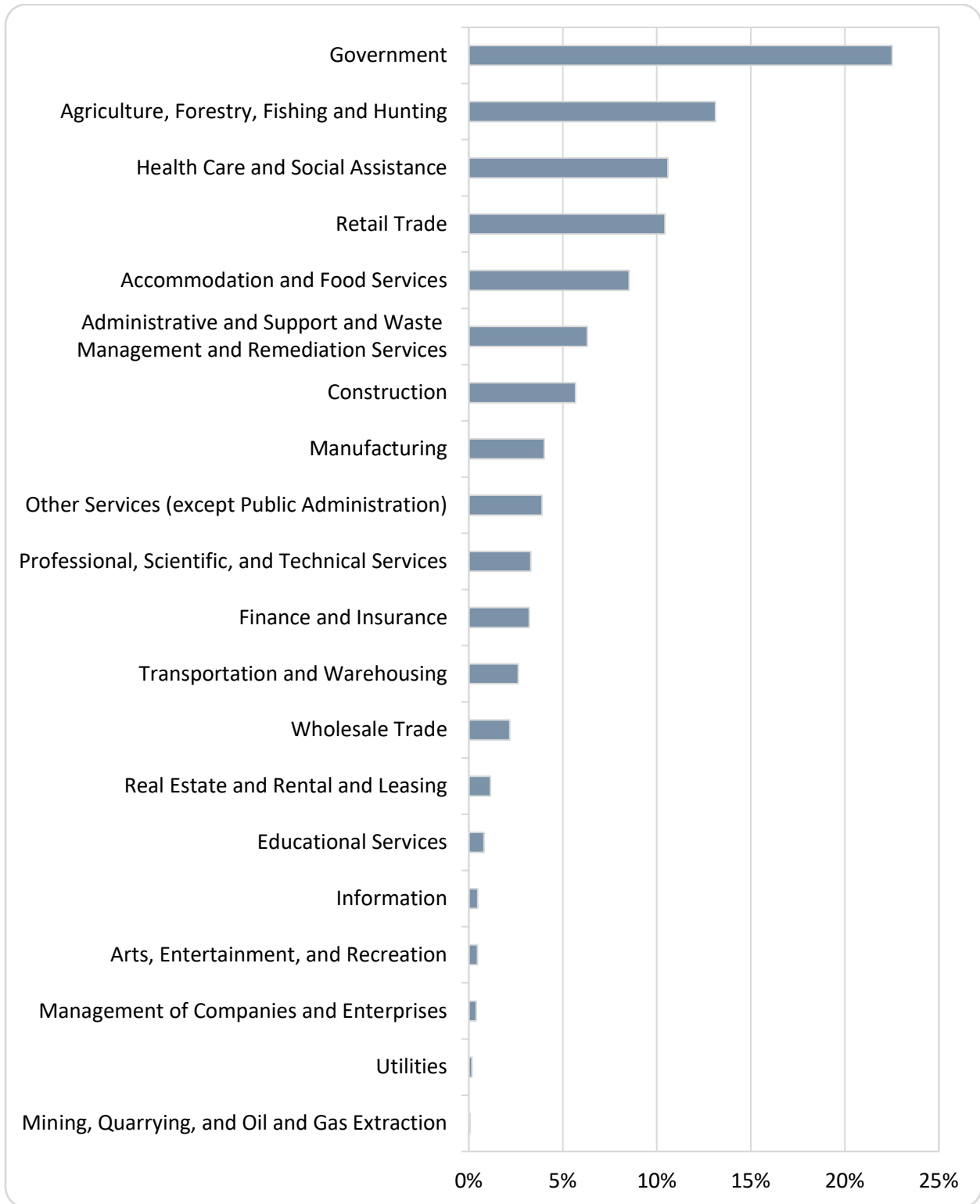
TABLE B-4. YUMA COUNTY SHIFT SHARE, 2023-2033

| NAICS              | Description  | National Effect | Industry Mix Effect | Regional Effect | Actual Change | Expected Change |
|--------------------|--|-----------------|---------------------|-----------------|---------------|-----------------|
| 11                 | Agriculture, Forestry, Fishing and Hunting                               | 1,485           | -1,266              | -3,060          | -2,841        | 219             |
| 21                 | Mining, Quarrying, and Oil and Gas Extraction                            | 5               | -14                 | 40              | 31            | -9              |
| 22                 | Utilities  | 20              | -14                 | -35             | -28           | 6               |
| 23                 | Construction   | 423             | 438                 | 794             | 1,655         | 861             |
| 31                 | Manufacturing  | 303             | -100                | 1,069           | 1,272         | 203             |
| 42                 | Wholesale Trade  | 184             | -98                 | 351             | 437           | 87              |
| 44                 | Retail Trade   | 977             | -754                | 770             | 993           | 223             |
| 48                 | Transportation and Warehousing   | 162             | 529                 | 57              | 748           | 690             |
| 51                 | Information  | 55              | 0                   | -250            | -195          | 55              |
| 52                 | Finance and Insurance  | 213             | 2                   | 1,203           | 1,418         | 215             |
| 53                 | Real Estate and Rental and Leasing                                       | 94              | 74                  | 11              | 179           | 168             |
| 54                 | Professional, Scientific, and Technical Services                         | 323             | 387                 | -730            | -20           | 710             |
| 55                 | Management of Companies and Enterprises                                  | 30              | 20                  | 152             | 201           | 49              |
| 56                 | Administrative and Support and Waste Management and Remediation Services | 607             | 79                  | 149             | 835           | 685             |
| 61                 | Educational Services   | 74              | -14                 | -26             | 35            | 60              |
| 62                 | Health Care and Social Assistance  | 906             | 349                 | 79              | 1,334         | 1,255           |
| 71                 | Arts, Entertainment, and Recreation                                      | 41              | 29                  | -103            | -32           | 70              |
| 72                 | Accommodation and Food Services  | 692             | 231                 | 728             | 1,651         | 923             |
| 81                 | Other Services (except Public Administration)                            | 334             | -300                | 359             | 393           | 34              |
| 90                 | Government   | 2,218           | -1,937              | -920            | -639          | 281             |
| <b>Grand Total</b> |  | <b>9,147</b>    | <b>-2,360</b>       | <b>640</b>      | <b>7,427</b>  | <b>6,786</b>    |

Notes: NAICS = National Industrial Classification System

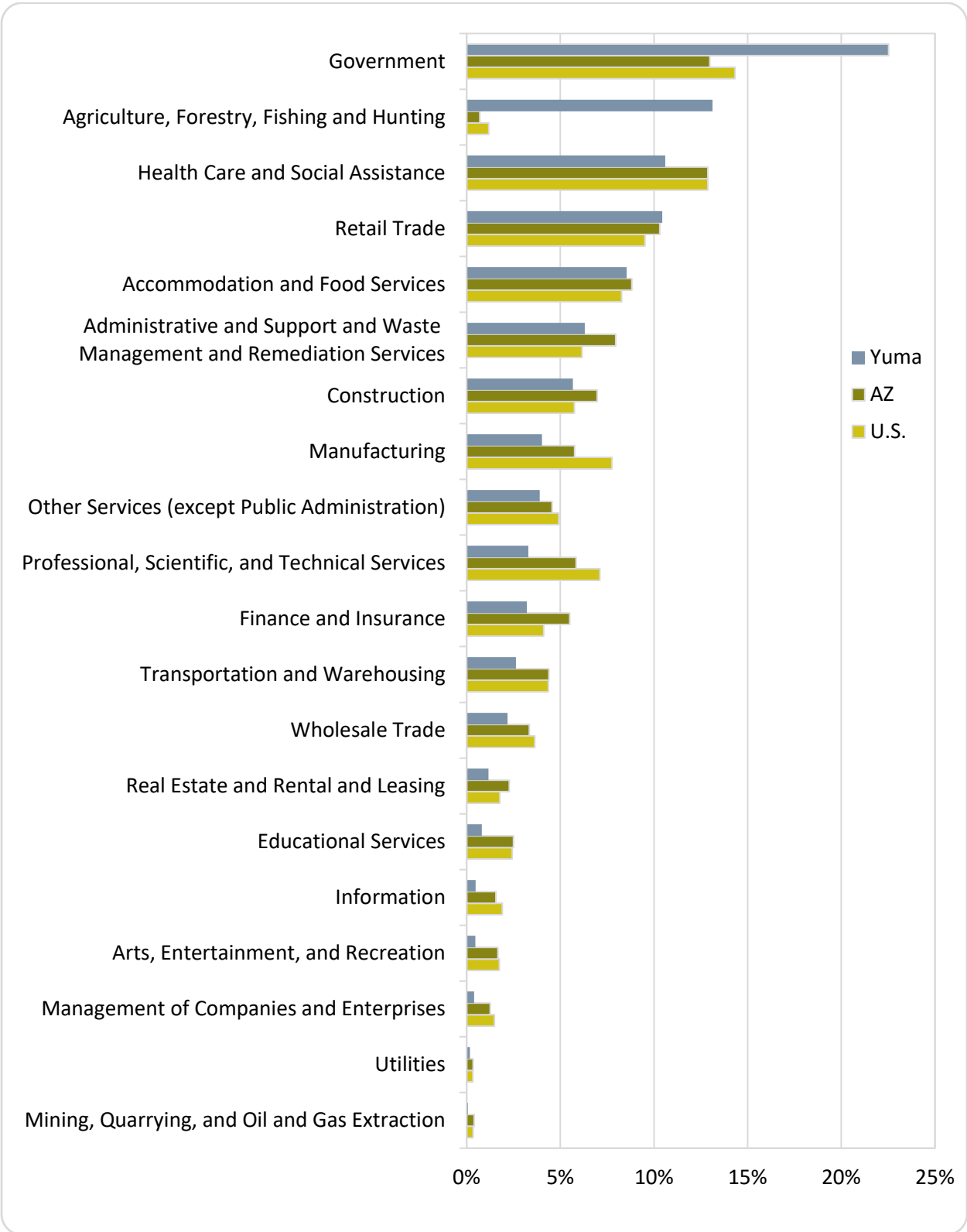
Source: EMSI; TNDG.

**FIGURE B-1. DISTRIBUTION OF EMPLOYMENT BY MAJOR INDUSTRY SECTOR FOR YUMA COUNTY, 2023**



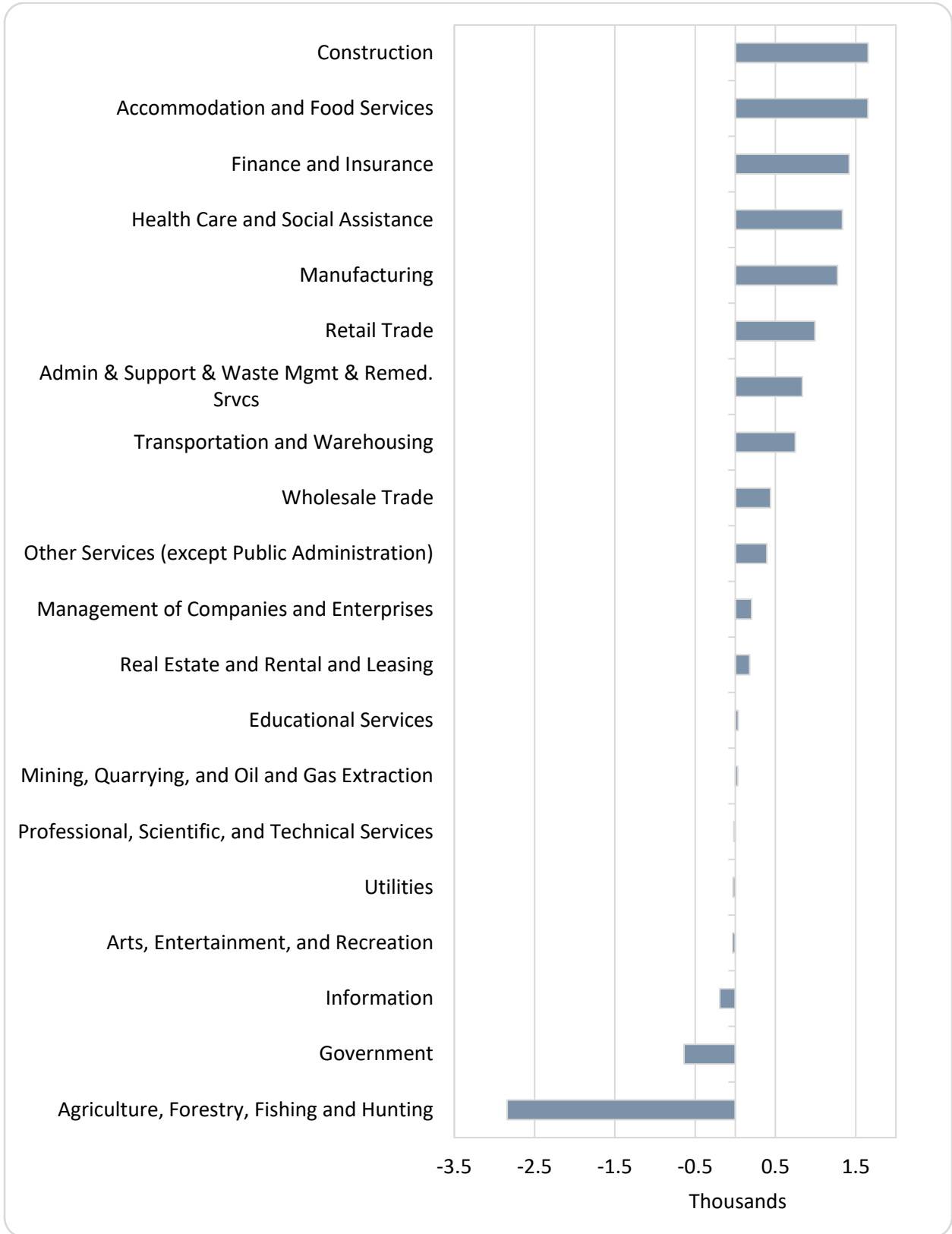
Source: EMSI; TNDG.

FIGURE B-2. DISTRIBUTION OF EMPLOYMENT BY MAJOR INDUSTRY SECTOR FOR YUMA COUNTY, AZ, AND U.S., 2023



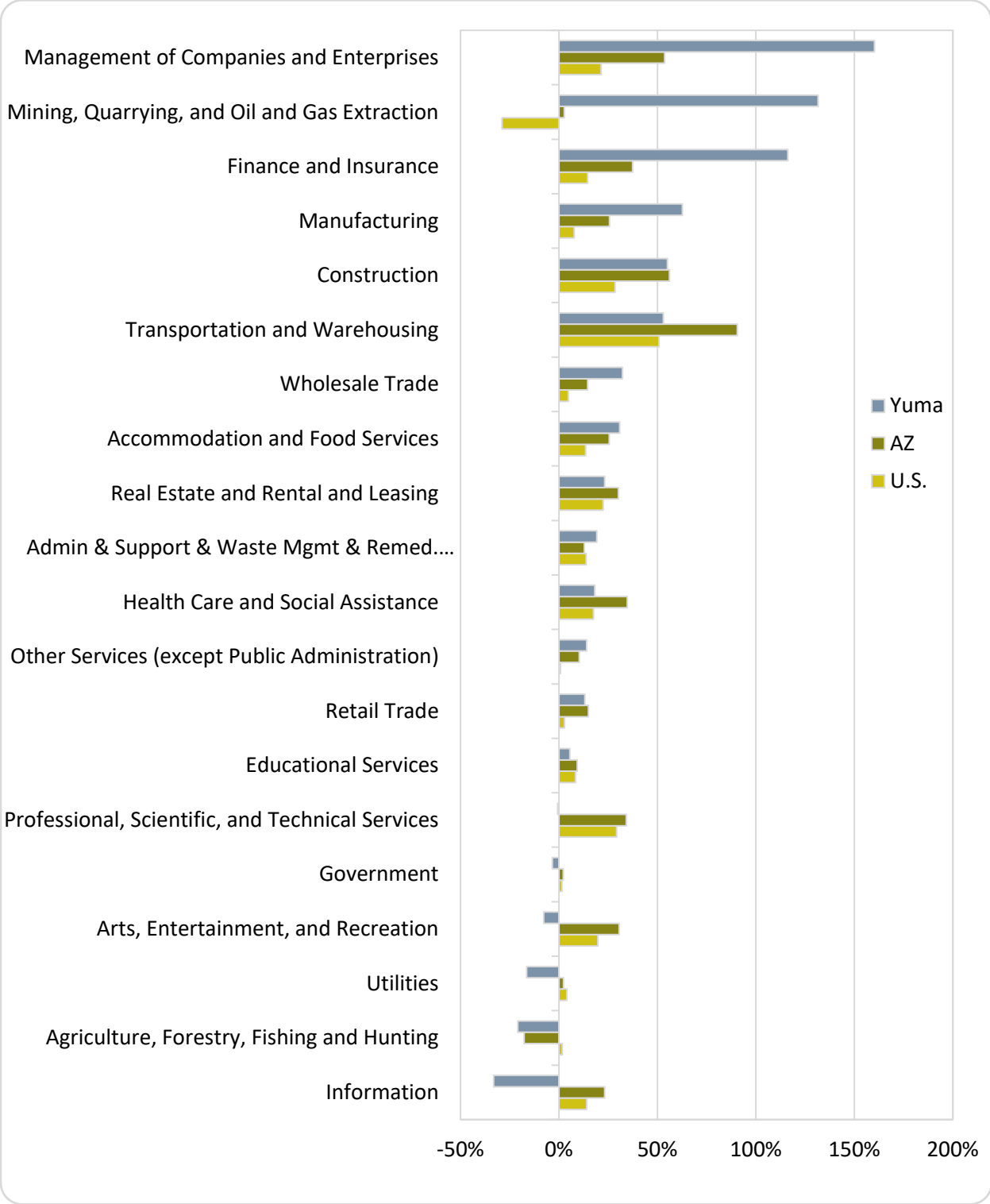
Source: EMSI; TNDG.

**FIGURE B-3. ABSOLUTE CHANGE IN EMPLOYMENT BY MAJOR INDUSTRY SECTOR FOR YUMA COUNTY, 2013-2023**



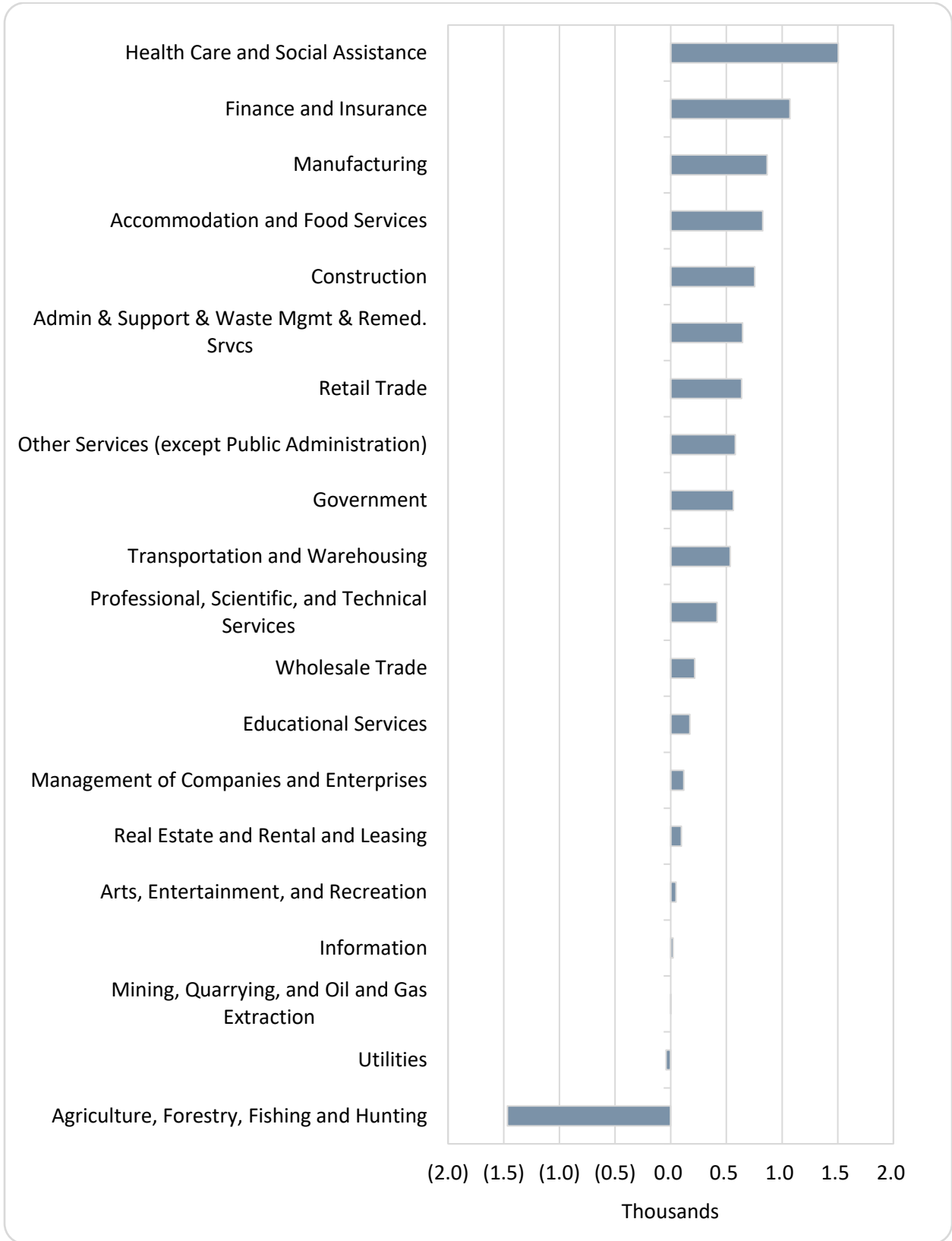
Source: EMSI; TNDG.

**FIGURE B-4. PERCENTAGE CHANGE IN EMPLOYMENT BY MAJOR INDUSTRY SECTOR FOR YUMA COUNTY, AZ, AND U.S., 2013-2023**



Source: EMSI; TNDG.

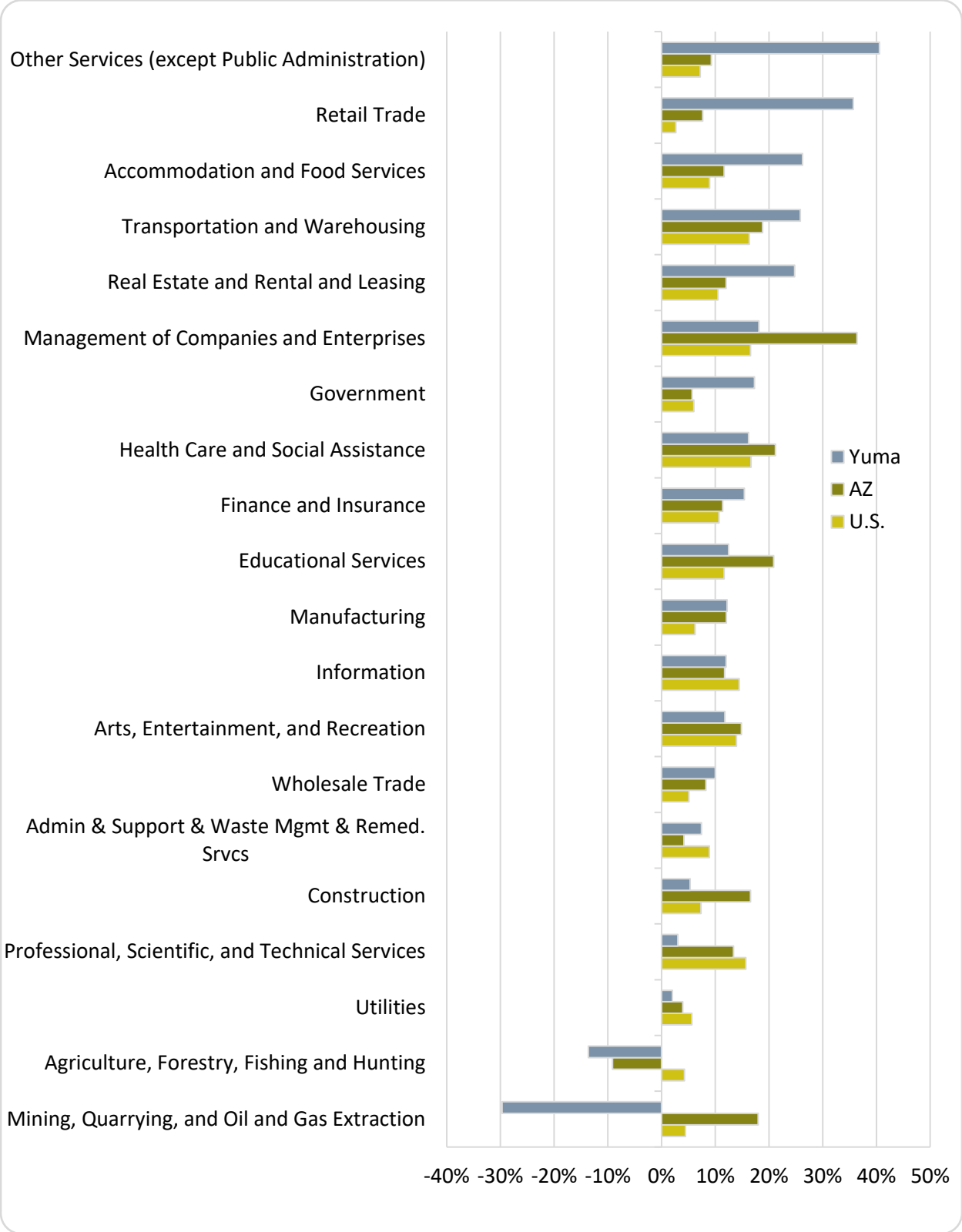
**FIGURE B-5. PROJECTED CHANGE IN EMPLOYMENT BY MAJOR INDUSTRY SECTOR FOR YUMA COUNTY, 2023**



Source: EMSI; TNDG.

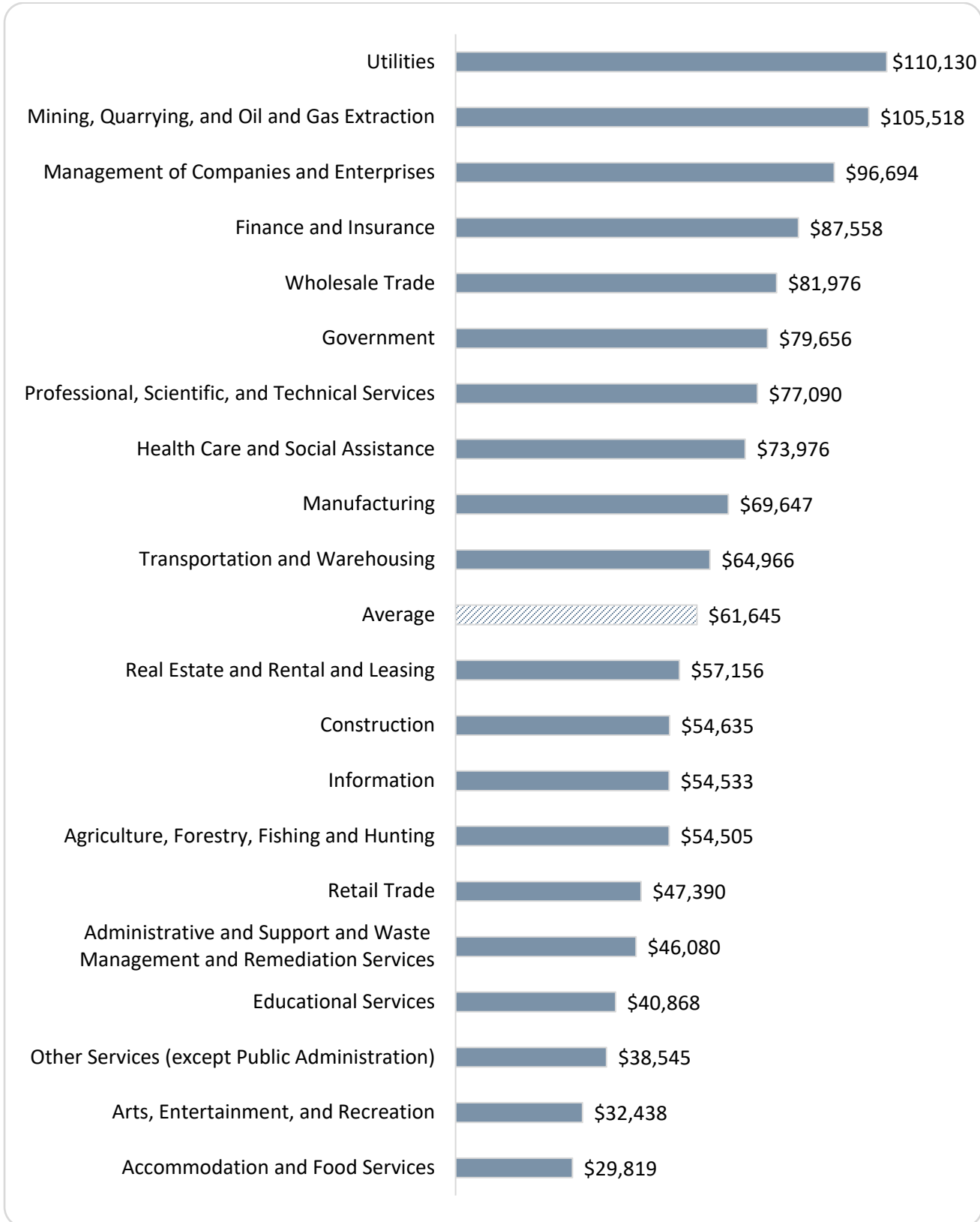


**FIGURE B-6. PERCENTAGE CHANGE IN EMPLOYMENT BY MAJOR INDUSTRY SECTOR FOR YUMA COUNTY, AZ, AND U.S., 2023**



Source: EMSI; TNDG.

**FIGURE B-7. AVERAGE ANNUAL WAGE BY MAJOR INDUSTRY SECTOR FOR YUMA COUNTY, 2023**



Source: EMSI; TNDG.

## Appendix C: Additional Data Resources

TABLE C-1. SELECTED ECONOMIC CHARACTERISTICS, LA PAZ COUNTY, YUMA COUNTY, CCR, AND AZ

| Variables  | La Paz County | Yuma County | CRR   | AZ    |
|--|---------------|-------------|-------|-------|
| <b>EMPLOYMENT STATUS</b>                                 |               |             |       |       |
| Population 16 years and over                             |               |             |       |       |
| Labor Force Participation Rate                           | 42.9%         | 53.6%       | 52.7% | 60.5% |
| Employment/Population Ratio                              | 38.1%         | 46.8%       | 46.1% | 57.0% |
| Unemployment Rate  | 10.8%         | 8.1%        | 8.3%  | 5.2%  |
| Labor Force Participation Rate by Educational Attainment |               |             |       |       |
| Population 25 to 64 years                                | 74.2%         | 72.0%       | 72.1% | 76.9% |
| Less than high school graduate                           | 72.2%         | 58.9%       | 59.6% | 60.8% |
| High school graduate (includes equivalency)              | 71.9%         | 69.4%       | 69.6% | 71.9% |
| Some college or Associates Degree                        | 75.7%         | 76.0%       | 76.0% | 77.4% |
| Bachelor's degree of higher                              | 78.8%         | 84.3%       | 84.0% | 85.3% |
| Employment/Population Ratio by Educational Attainment    |               |             |       |       |
| Population 25 to 64 years                                | 64.4%         | 64.9%       | 64.9% | 73.1% |
| Less than high school graduate                           | 46.5%         | 51.5%       | 51.2% | 56.5% |
| High school graduate (includes equivalency)              | 67.2%         | 62.1%       | 62.5% | 67.4% |
| Some college or Associates Degree                        | 68.4%         | 69.0%       | 69.0% | 73.4% |
| Bachelor's degree of higher                              | 71.0%         | 77.8%       | 77.4% | 82.6% |
| Unemployment Rate by Educational Attainment              |               |             |       |       |
| Population 25 to 64 years                                | 12.8%         | 7.0%        | 7.4%  | 4.3%  |
| Less than high school graduate                           | 35.6%         | 12.0%       | 13.2% | 7.0%  |
| High school graduate (includes equivalency)              | 5.1%          | 7.8%        | 7.6%  | 5.8%  |
| Some college or Associates Degree                        | 9.7%          | 5.2%        | 5.5%  | 4.5%  |
| Bachelor's degree of higher                              | 9.9%          | 4.4%        | 4.7%  | 2.7%  |
| <b>COMMUTING TO WORK</b>                                 |               |             |       |       |
| Workers 16 years and over                                |               |             |       |       |
| Car, truck, or van -- drove alone                        | 73.2%         | 78.4%       | 78.1% | 68.5% |
| Car, truck, or van -- carpooled                          | 10.7%         | 11.1%       | 11.1% | 9.8%  |
| Public transportation (excluding taxicab)                | 0.2%          | 0.7%        | 0.7%  | 1.2%  |
| Walked   | 4.5%          | 1.6%        | 1.8%  | 1.7%  |
| Other means  | 1.0%          | 1.4%        | 1.4%  | 2.3%  |
| Worked at home   | 10.5%         | 6.7%        | 7.0%  | 16.5% |
| Mean travel time to work (minutes)                       | 13.9          | 20.9        | 20.4  | 25.5  |
| <b>INDUSTRY</b>  |               |             |       |       |
| Civilian employed population 16 years and over           |               |             |       |       |
| Agriculture, forestry, fishing and hunting, and mining   | 7.7%          | 9.7%        | 9.6%  | 1.3%  |
| Construction   | 9.3%          | 7.0%        | 7.2%  | 7.7%  |
| Manufacturing  | 3.9%          | 5.7%        | 5.5%  | 7.4%  |
| Wholesale trade  | 1.0%          | 3.0%        | 2.9%  | 2.1%  |
| Retail trade   | 11.5%         | 10.5%       | 10.6% | 11.9% |
| Transportation and warehousing, and utilities            | 5.4%          | 5.4%        | 5.4%  | 5.7%  |
| Information  | 0.7%          | 1.0%        | 1.0%  | 1.6%  |

| Variables   | La Paz County | Yuma County | CRR      | AZ        |
|---|---------------|-------------|----------|-----------|
| Finance and insurance, & real estate & rental & leasing   | 4.4%          | 3.8%        | 3.8%     | 8.9%      |
| Professional, scientific, & mgmt, & admin & waste mgmt srvc                                     | 6.0%          | 9.6%        | 9.3%     | 12.6%     |
| Educational services, & health care & social assistance   | 18.4%         | 20.4%       | 20.3%    | 22.0%     |
| Arts, entertainment, & recreation, & accommodation & food srvc                                  | 18.2%         | 10.1%       | 10.7%    | 9.5%      |
| Other services, except public administration  | 2.1%          | 4.1%        | 4.0%     | 4.5%      |
| Public administration   | 11.3%         | 9.6%        | 9.7%     | 4.8%      |
| <b>INCOME AND BENEFITS (IN 2021 INFLATION-ADJUSTED DOLLARS)</b>                                 |               |             |          |           |
| Total households  |               |             |          |           |
| Less than \$10,000  | 8.3%          | 6.2%        | 6.4%     | 4.9%      |
| \$10,000 to \$14,999  | 3.4%          | 4.0%        | 3.9%     | 2.9%      |
| \$15,000 to \$24,999  | 12.0%         | 8.9%        | 9.2%     | 6.1%      |
| \$25,000 to \$34,999  | 12.4%         | 8.9%        | 9.2%     | 6.9%      |
| \$35,000 to \$49,999  | 14.3%         | 13.1%       | 13.2%    | 10.9%     |
| \$50,000 to \$74,999  | 18.9%         | 20.5%       | 20.3%    | 17.0%     |
| \$75,000 to \$99,999  | 12.4%         | 14.1%       | 13.9%    | 13.6%     |
| \$100,000 to \$149,999  | 10.8%         | 14.8%       | 14.4%    | 18.1%     |
| \$150,000 to \$199,999  | 3.5%          | 5.1%        | 4.9%     | 9.0%      |
| \$200,000 or more   | 4.1%          | 4.6%        | 4.5%     | 10.6%     |
| Median household income (dollars)   | \$49,506      | \$60,417    | -        | \$76,872  |
| Mean household income (dollars)   | \$68,092      | \$77,603    | \$76,618 | \$104,138 |
| Per capita income (dollars)   | \$33,413      | \$28,918    | \$29,251 | \$40,736  |
| <b>PERCENT OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW POVERTY LEVEL</b> |               |             |          |           |
| All families  | 15.2%         | 13.8%       | 13.9%    | 8.9%      |
| With related children of the householder under 18 years   | 26.0%         | 18.9%       | 19.3%    | 13.8%     |
| With related children of the householder under 5 years only                                     | 49.5%         | 18.5%       | 19.9%    | 12.5%     |
| Married couple families   | 11.1%         | 7.8%        | 8.1%     | 5.1%      |
| With related children of the householder under 18 years   | 14.9%         | 7.4%        | 7.7%     | 6.8%      |
| With related children of the householder under 5 years only                                     | 31.6%         | 5.8%        | 6.6%     | 5.5%      |
| Families with female householder, no husband present  | 36.7%         | 29.3%       | 29.9%    | 22.3%     |
| With related children of the householder under 18 years   | 50.2%         | 37.0%       | 38.0%    | 30.4%     |
| With related children of the householder under 5 years only                                     | 86.0%         | 33.4%       | 36.2%    | 31.8%     |
| All people  | 18.4%         | 16.5%       | 16.6%    | 12.8%     |
| Under 18 years  | 29.4%         | 22.5%       | 22.8%    | 17.0%     |
| Related children of the householder under 18 years  | 27.0%         | 22.2%       | 22.4%    | 16.7%     |
| Related children of the householder under 5 years   | 34.8%         | 25.1%       | 25.5%    | 18.2%     |
| Related children of the householder 5 to 17 years   | 24.5%         | 21.1%       | 21.8%    | 16.1%     |
| 18 years and over   | 16.6%         | 14.4%       | 14.6%    | 11.6%     |
| 18 to 64 years  | 23.6%         | 14.6%       | 15.1%    | 12.1%     |
| 65 years and over   | 9.7%          | 14.0%       | 13.4%    | 9.9%      |
| People in families  | 15.9%         | 14.7%       | 14.8%    | 10.1%     |
| Unrelated individuals 15 years and over   | 25.7%         | 26.0%       | 25.9%    | 22.8%     |

Note: Values provided as shares unless where noted.

Source: U.S. Census Bureau, 2019-2023 ACS 5-Year Estimates; TNDG.

TABLE C-2. SELECTED HOUSING CHARACTERISTICS, LA PAZ COUNTY, YUMA COUNTY, CRR, AND AZ

| Variables   | La Paz County | Yuma County | CRR   | AZ    |
|---|---------------|-------------|-------|-------|
| <b>TOTAL HOUSING UNITS</b>  |               |             |       |       |
| Occupied housing units  | 65.1%         | 81.9%       | 79.7% | 89.0% |
| Vacant housing units  | 34.9%         | 18.1%       | 20.3% | 11.0% |
| <b>UNITS IN STRUCTURE</b>   |               |             |       |       |
| Total housing units   |               |             |       |       |
| 1-unit, detached  | 36.4%         | 54.2%       | 51.9% | 64.1% |
| 1-unit, attached  | 0.8%          | 3.9%        | 3.5%  | 5.1%  |
| 2 units   | 1.0%          | 1.1%        | 1.1%  | 1.3%  |
| 3 or 4 units  | 1.8%          | 3.5%        | 3.3%  | 3.3%  |
| 5 to 9 units  | 0.1%          | 2.5%        | 2.2%  | 3.6%  |
| 10 to 19 units  | 0.9%          | 1.5%        | 1.4%  | 3.9%  |
| 20 or more units  | 0.3%          | 2.6%        | 2.3%  | 8.8%  |
| Mobile home   | 54.7%         | 29.1%       | 32.3% | 9.5%  |
| Boat, RV, van, etc.   | 4.0%          | 1.7%        | 2.0%  | 0.4%  |
| <b>YEAR STRUCTURE BUILT</b>   |               |             |       |       |
| Total housing units   |               |             |       |       |
| Built 2020 or later   | 0.3%          | 1.0%        | 0.9%  | 1.6%  |
| Built 2010 to 2019  | 10.0%         | 12.4%       | 12.1% | 10.9% |
| Built 2000 to 2009  | 15.0%         | 24.9%       | 23.6% | 22.7% |
| Built 1990 to 1999  | 15.6%         | 20.7%       | 20.0% | 18.2% |
| Built 1980 to 1989  | 20.4%         | 15.0%       | 15.7% | 16.7% |
| Built 1970 to 1979  | 22.3%         | 13.0%       | 14.2% | 15.5% |
| Built 1960 to 1969  | 11.3%         | 4.8%        | 5.6%  | 6.6%  |
| Built 1950 to 1959  | 3.3%          | 5.1%        | 4.9%  | 5.1%  |
| Built 1940 to 1949  | 1.1%          | 1.6%        | 1.6%  | 1.4%  |
| Built 1939 or earlier   | 0.8%          | 1.5%        | 1.4%  | 1.4%  |
| <b>HOUSING TENURE</b>   |               |             |       |       |
| Occupied housing units  |               |             |       |       |
| Owner-occupied  | 57.7%         | 68.5%       | 69.1% | 66.3% |
| Renter-occupied   | 42.3%         | 31.5%       | 30.9% | 33.7% |
| <b>SELECTED MONTHLY OWNER COSTS AS A PERCENTAGE OF HOUSEHOLD INCOME (SMOCAPI)</b> |               |             |       |       |
| Housing units with a mortgage   |               |             |       |       |
| Less than 20.0 percent  | 53.8%         | 48.0%       | 48.3% | 49.0% |
| 20.0 to 24.9 percent  | 9.9%          | 15.0%       | 14.7% | 14.9% |
| 25.0 to 29.9 percent  | 10.4%         | 9.4%        | 9.4%  | 9.6%  |
| 30.0 to 34.9 percent  | 6.6%          | 6.2%        | 6.2%  | 6.3%  |
| 35.0 percent or more  | 19.4%         | 21.4%       | 21.3% | 20.2% |
| Housing units without a mortgage  |               |             |       |       |
| Less than 10.0 percent  | 46.5%         | 52.6%       | 51.6% | 53.5% |
| 10.0 to 14.9 percent  | 20.8%         | 19.0%       | 19.3% | 17.4% |
| 15.0 to 19.9 percent  | 8.7%          | 8.2%        | 8.3%  | 8.8%  |
| 20.0 to 24.9 percent  | 5.0%          | 6.0%        | 5.9%  | 5.1%  |
| 25.0 to 29.9 percent  | 4.7%          | 4.1%        | 4.2%  | 3.4%  |

| Variables  | La Paz County | Yuma County | CRR   | AZ    |
|--|---------------|-------------|-------|-------|
| 30.0 to 34.9 percent   | 3.1%          | 1.6%        | 1.8%  | 2.4%  |
| 35.0 percent or more   | 11.2%         | 8.4%        | 8.8%  | 9.5%  |
| <b>GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME (GRPI)</b> |               |             |       |       |
| Occupied units paying rent                                   |               |             |       |       |
| Less than 15.0 percent                                       | 39.4%         | 18.4%       | 20.5% | 12.3% |
| 15.0 to 19.9 percent   | 14.3%         | 16.7%       | 16.4% | 12.1% |
| 20.0 to 24.9 percent   | 10.5%         | 9.7%        | 9.7%  | 13.4% |
| 25.0 to 29.9 percent   | 8.1%          | 8.0%        | 8.0%  | 11.9% |
| 30.0 to 34.9 percent   | 5.0%          | 10.9%       | 10.3% | 9.3%  |
| 35.0 percent or more   | 22.8%         | 36.3%       | 34.9% | 41.0% |
| <b>Vacancy Status</b>  |               |             |       |       |
| Vacant housing units   |               |             |       |       |
| For rent   | 1.1%          | 7.5%        | 6.1%  | 15.3% |
| Rented, not occupied   | 0.9%          | 1.8%        | 1.6%  | 3.5%  |
| For sale only  | 1.3%          | 3.3%        | 2.9%  | 5.7%  |
| Sold, not occupied   | 1.0%          | 2.9%        | 2.4%  | 3.8%  |
| For seasonal, recreational, or occasional use                | 84.0%         | 69.7%       | 72.8% | 50.0% |
| For migrant workers  | 0.4%          | 2.7%        | 2.2%  | 0.3%  |
| Other vacant   | 11.3%         | 12.1%       | 12.0% | 21.4% |

Note: Values provided as shares unless where noted.

Source: U.S. Census Bureau, 2019-2023 ACS 5-Year Estimates; TNDG.

TABLE C-3. SELECTED EDUCATION AND SOCIAL CHARACTERISTICS, LA PAZ COUNTY, YUMA COUNTY, CRR, AND AZ

| Variables   | La Paz County | Yuma County | CRR   | AZ       |
|---|---------------|-------------|-------|----------|
| <b>AGE BY EDUCATIONAL ATTAINMENT</b>  |               |             |       |          |
| Population 18 to 24 years   |               |             |       |          |
| Less than high school graduate  | 17.2%         | 13.5%       | 13.6% | 14.1%    |
| High school graduate (includes equivalency)                                       | 46.3%         | 38.5%       | 38.8% | 35.8%    |
| Some college or associate's degree  | 35.0%         | 42.8%       | 42.5% | 39.5%    |
| Bachelor's degree or higher   | 1.6%          | 5.2%        | 5.0%  | 10.7%    |
| Population 25 years and over  |               |             |       |          |
| Less than 9th grade   | 5.9%          | 11.8%       | 11.3% | 4.7%     |
| 9th to 12th grade, no diploma   | 11.6%         | 11.5%       | 11.5% | 6.3%     |
| High school graduate (includes equivalency)                                       | 34.1%         | 26.7%       | 27.4% | 23.5%    |
| Some college, no degree   | 23.6%         | 25.0%       | 24.8% | 23.8%    |
| Associate's degree  | 11.0%         | 8.3%        | 8.5%  | 9.2%     |
| Bachelor's degree   | 8.8%          | 10.6%       | 10.5% | 20.0%    |
| Graduate or professional degree   | 5.1%          | 6.0%        | 5.9%  | 12.6%    |
| High school graduate or higher  | 82.5%         | 76.6%       | 77.2% | 89.1%    |
| Bachelor's degree or higher   | 13.9%         | 16.7%       | 16.4% | 32.6%    |
| <b>1ST BACHELOR'S DEGREE</b>  |               |             |       |          |
| Total population 25 years and over with a Bachelor's degree or higher             |               |             |       |          |
| Science and Engineering   | 26.2%         | 28.3%       | 28.1% | 34.1%    |
| Science and Engineering Related Fields  | 14.9%         | 11.3%       | 11.5% | 10.5%    |
| Business  | 16.5%         | 19.8%       | 19.6% | 21.4%    |
| Education   | 33.4%         | 19.4%       | 20.4% | 12.6%    |
| Arts, Humanities and Others   | 9.0%          | 21.3%       | 20.3% | 21.4%    |
| <b>MEDIAN EARNINGS IN THE PAST 12 MONTHS (IN 2019 INFLATION-ADJUSTED DOLLARS)</b> |               |             |       |          |
| Total population 25 years and over with earnings                                  |               |             |       |          |
| Less than high school graduate  | \$27,125      | \$28,336    | -     | \$32,329 |
| High school graduate (includes equivalency)                                       | \$40,888      | \$35,235    | -     | \$39,212 |
| Some college or associate's degree  | \$33,961      | \$41,103    | -     | \$45,811 |
| Bachelor's degree   | \$74,375      | \$56,408    | -     | \$65,087 |
| Graduate or professional degree   | \$58,750      | \$70,217    | -     | \$82,033 |
| <b>HISPANIC OR LATINO ORIGIN</b>  |               |             |       |          |
| Not Hispanic or Latino  | 74.5%         | 35.6%       | 38.5% | 69.0%    |
| Hispanic or Latino  | 25.5%         | 64.4%       | 61.5% | 31.0%    |
| <b>RACE</b>   |               |             |       |          |
| White Alone   | 61.3%         | 48.4%       | 49.3% | 63.2%    |
| Black or African American Alone   | 0.4%          | 1.7%        | 1.6%  | 4.6%     |
| American Indian and Alaska Native Alone   | 14.2%         | 1.4%        | 2.4%  | 4.1%     |
| Asian Alone   | 1.1%          | 1.1%        | 1.1%  | 3.4%     |
| Native Hawaiian and Other Pacific Islander Alone                                  | 0.0%          | 0.1%        | 0.1%  | 0.2%     |
| Some Other Race Alone   | 6.9%          | 13.2%       | 12.7% | 8.2%     |
| Two or More Races   | 16.0%         | 34.1%       | 32.8% | 16.2%    |

Note: Values provided as shares unless where noted.

Source: U.S. Census Bureau, 2019-2023 ACS 5-Year Estimates; TNDG.

TABLE C-4. SELECTED HOUSEHOLD AND AGE CHARACTERISTICS, LA PAZ COUNTY, YUMA COUNTY, CRR, AND AZ

| Variables  | La Paz County | Yuma County | CRR   | AZ    |
|--|---------------|-------------|-------|-------|
| <b>HOUSEHOLDS</b>  |               |             |       |       |
| Average household size   | 1.85          | 2.60        | 2.53  | 2.54  |
| <b>FAMILIES</b>  |               |             |       |       |
| Average family size  | 2.21          | 3.07        | 2.99  | 3.12  |
| <b>AGE OF OWN CHILDREN</b>                                     |               |             |       |       |
| Households with own children of the householder under 18 years |               |             |       |       |
| Under 6 years only   | 17.5%         | 20.6%       | 20.4% | 19.7% |
| Under 6 years and 6 to 17 years                                | 22.1%         | 26.7%       | 26.4% | 21.5% |
| 6 to 17 years only   | 60.4%         | 52.7%       | 53.1% | 58.8% |
| <b>SELECTED HOUSEHOLDS BY TYPE</b>                             |               |             |       |       |
| Households with 1 or more people under 18 years                | 19.9%         | 35.0%       | 33.4% | 29.3% |
| Households w/ 1 or more people 60 years and over               | 64.4%         | 47.2%       | 49.0% | 43.5% |
| Households w/ 1 or more people 65 years and over               | 55.7%         | 39.1%       | 40.8% | 34.0% |
| Householder living alone                                       | 32.5%         | 23.5%       | 24.4% | 27.4% |
| 65 years and over  | 19.9%         | 13.3%       | 14.0% | 11.9% |
| <b>SELECTED AGE CATEGORIES (POPULATION)</b>                    |               |             |       |       |
| Under 5 years  | 4.2%          | 6.8%        | 6.6%  | 5.5%  |
| 5 to 9 years   | 4.3%          | 6.7%        | 6.5%  | 6.0%  |
| 10 to 14 years   | 4.4%          | 7.2%        | 7.0%  | 6.5%  |
| 15 to 19 years   | 3.2%          | 7.0%        | 6.7%  | 6.6%  |
| 20 to 24 years   | 4.1%          | 7.5%        | 7.3%  | 6.7%  |
| 25 to 34 years   | 7.7%          | 13.9%       | 13.5% | 13.7% |
| 35 to 44 years   | 8.2%          | 11.3%       | 11.1% | 12.6% |
| 45 to 54 years   | 9.6%          | 9.6%        | 9.6%  | 11.7% |
| 55 to 59 years   | 4.6%          | 4.9%        | 4.9%  | 5.9%  |
| 60 to 64 years   | 7.4%          | 4.8%        | 5.0%  | 6.2%  |
| 65 to 74 years   | 18.2%         | 10.0%       | 10.6% | 10.7% |
| 75 to 84 years   | 19.5%         | 8.0%        | 8.8%  | 5.9%  |
| 85 years and over  | 4.6%          | 2.3%        | 2.5%  | 1.9%  |

Note: Values provided as shares unless where noted.

Source: U.S. Census Bureau, 2019-2023 ACS 5-Year Estimates; TNDG.



TABLE C-5. EMPLOYMENT CHARACTERISTICS, LA PAZ COUNTY, YUMA COUNTY, CRR, AND AZ

|  | La Paz<br>County | Yuma<br>County | CRR       | AZ        |
|--|------------------|----------------|-----------|-----------|
| <b>TOTAL PRIMARY JOBS</b>                                  |                  |                |           |           |
| Total Primary Jobs   | 53,003           | 674,626        | 1,278,856 | 2,699,917 |
| <b>JOBS BY WORKER AGE</b>                                  |                  |                |           |           |
| Age 29 or younger  | 19.7%            | 23.8%          | 21.0%     | 23.2%     |
| Age 30 to 54   | 56.4%            | 53.4%          | 55.9%     | 53.3%     |
| Age 55 or older  | 23.9%            | 22.8%          | 23.2%     | 23.5%     |
| <b>JOBS BY EARNINGS</b>                                    |                  |                |           |           |
| \$1,250 per month or less                                  | 19.0%            | 13.6%          | 11.0%     | 13.3%     |
| \$1,251 to \$3,333 per month                               | 35.5%            | 35.7%          | 27.4%     | 33.2%     |
| More than \$3,333 per month                                | 45.5%            | 50.7%          | 61.6%     | 53.5%     |
| <b>JOBS BY NAICS INDUSTRY SECTOR</b>                       |                  |                |           |           |
| Agriculture, Forestry, Fishing and Hunting                 | 18.1%            | 1.3%           | 0.6%      | 0.8%      |
| Mining, Quarrying, and Oil and Gas Extraction              | 0.7%             | 0.1%           | 0.0%      | 0.4%      |
| Utilities  | 3.7%             | 0.6%           | 0.6%      | 0.8%      |
| Construction   | 3.4%             | 10.3%          | 6.4%      | 6.4%      |
| Manufacturing  | 4.4%             | 6.1%           | 8.8%      | 6.6%      |
| Wholesale Trade  | 3.0%             | 3.7%           | 3.4%      | 3.6%      |
| Retail Trade   | 10.3%            | 11.4%          | 9.1%      | 11.3%     |
| Transportation and Warehousing                             | 3.1%             | 9.6%           | 2.3%      | 4.4%      |
| Information  | 0.3%             | 0.7%           | 1.9%      | 1.8%      |
| Finance and Insurance                                      | 1.1%             | 1.5%           | 3.6%      | 6.6%      |
| Real Estate and Rental and Leasing                         | 0.8%             | 1.4%           | 2.0%      | 2.0%      |
| Professional, Scientific, and Technical Services           | 1.6%             | 3.3%           | 11.8%     | 6.0%      |
| Management of Companies and Enterprises                    | 0.3%             | 0.6%           | 2.0%      | 1.2%      |
| Administration & Support, Waste Management and Remediation | 3.1%             | 6.7%           | 6.8%      | 8.3%      |
| Educational Services                                       | 10.1%            | 9.4%           | 9.1%      | 7.9%      |
| Health Care and Social Assistance                          | 15.3%            | 14.1%          | 14.4%     | 14.5%     |
| Arts, Entertainment, and Recreation                        | 0.3%             | 1.7%           | 1.7%      | 1.7%      |
| Accommodation and Food Services                            | 7.1%             | 10.1%          | 8.3%      | 8.4%      |
| Other Services (excluding Public Administration)           | 1.6%             | 2.6%           | 3.1%      | 2.6%      |
| Public Administration                                      | 11.7%            | 5.0%           | 4.1%      | 4.6%      |

Source: U.S. Census Bureau, OnTheMap LEHD Origin-Destination Employment 2022; TNDG.

TABLE C-6. LABOR FORCE IN-EFFICIENCY, LA PAZ COUNTY, YUMA COUNTY, CRR, AND AZ

| Inflow/Outflow Analysis                           | La Paz County | Yuma County | CRR    |
|---|---------------|-------------|--------|
| <b>Selection Area Labor Market Size</b>           |               |             |        |
| Employed in the Selection Area                    | 100.0%        | 100.0%      | 100.0% |
| Living in the Selection Area                      | 114.4%        | 108.2%      | 108.7% |
| Net Job Inflow (+) or Outflow (-)                 | -             | -           | -      |
| <b>In-Area Labor Force Efficiency</b>             |               |             |        |
| Living in the Selection Area                      | 100.0%        | 100.0%      | 100.0% |
| Living and Employed in the Selection Area         | 45.3%         | 75.5%       | 73.1%  |
| Living in the Selection Area but Employed Outside | 54.7%         | 24.5%       | 26.9%  |
| <b>In-Area Employment Efficiency</b>              |               |             |        |
| Employed in the Selection Area                    | 100.0%        | 100.0%      | 100.0% |
| Employed and Living in the Selection Area         | 51.8%         | 81.7%       | 79.5%  |
| Employed in the Selection Area but Living Outside | 48.2%         | 18.3%       | 20.5%  |

Source: U.S. Census Bureau, OnTheMap LEHD Origin-Destination Employment 2022; TNDG.

**TABLE C-7. ANNUAL UNEMPLOYMENT RATES, LA PAZ COUNTY, YUMA COUNTY, AND AZ (2015-2024)**

|               | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021 | 2022  | 2023  | 2024  |
|---------------|-------|-------|-------|-------|-------|-------|------|-------|-------|-------|
| La Paz County | 7.5%  | 6.2%  | 5.5%  | 6.2%  | 5.9%  | 7.0%  | 5.3% | 4.6%  | 4.5%  | 4.2%  |
| Yuma County   | 21.8% | 19.2% | 17.3% | 16.9% | 16.7% | 12.6% | 9.1% | 12.3% | 12.4% | 13.2% |
| Arizona       | 6.1%  | 5.5%  | 5.0%  | 4.8%  | 4.8%  | 7.8%  | 5.0% | 3.7%  | 3.7%  | 3.6%  |

Source: Arizona Office of Economic Opportunity; TNDG.

**TABLE C-8. POPULATION PROJECTIONS, COMPARATIVE GEOGRAPHIES (2024-2030)**

| Geographies                             | 2024             | 2025             | 2026             | 2027             | 2028             | 2029             | 2030             | % Chg         |
|---|------------------|------------------|------------------|------------------|------------------|------------------|------------------|---------------|
| Parker                                  | 3,442            | 3,480            | 3,511            | 3,537            | 3,558            | 3,573            | 3,584            | 4.13%         |
| Quartzsite                              | 2,417            | 2,418            | 2,418            | 2,418            | 2,418            | 2,416            | 2,415            | -0.08%        |
| Unincorporated Balance of La Paz County | 11,175           | 11,230           | 11,262           | 11,278           | 11,278           | 11,261           | 11,229           | 0.48%         |
| <b>La Paz County</b>                    | <b>17,034</b>    | <b>17,128</b>    | <b>17,192</b>    | <b>17,233</b>    | <b>17,253</b>    | <b>17,251</b>    | <b>17,228</b>    | <b>1.14%</b>  |
| San Luis                                | 36,618           | 37,343           | 38,025           | 38,700           | 39,367           | 40,025           | 40,674           | 11.08%        |
| Somerton                                | 15,183           | 15,432           | 15,663           | 15,891           | 16,115           | 16,336           | 16,553           | 9.02%         |
| Wellton                                 | 2,673            | 2,748            | 2,821            | 2,892            | 2,963            | 3,034            | 3,103            | 16.09%        |
| Yuma                                    | 103,218          | 104,909          | 106,479          | 108,028          | 109,555          | 111,057          | 112,533          | 9.02%         |
| Unincorporated Balance of Yuma County   | 58,445           | 58,817           | 59,120           | 59,410           | 59,687           | 59,949           | 60,197           | 3.00%         |
| <b>Yuma County</b>                      | <b>216,137</b>   | <b>219,249</b>   | <b>222,107</b>   | <b>224,921</b>   | <b>227,687</b>   | <b>230,400</b>   | <b>233,060</b>   | <b>7.83%</b>  |
| <b>CRR</b>                              | <b>233,171</b>   | <b>236,377</b>   | <b>239,299</b>   | <b>242,154</b>   | <b>244,940</b>   | <b>247,651</b>   | <b>250,288</b>   | <b>7.34%</b>  |
| <b>Arizona</b>                          | <b>7,699,474</b> | <b>7,854,359</b> | <b>7,998,647</b> | <b>8,139,000</b> | <b>8,275,409</b> | <b>8,408,372</b> | <b>8,538,048</b> | <b>10.89%</b> |

Source: Arizona Office of Economic Opportunity; TNDG.

**TABLE C-9. TRAFFIC COUNTS AT THE SAN LUIS BORDER CROSSING BY TYPE BY YEAR (2019-2024)**

| Type of Traffic  | 2019      | 2020      | 2021      | 2022      | 2023      | 2024      |
|------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| Pedestrians      | 2,529,641 | 1,821,114 | 1,875,567 | 2,058,032 | 2,290,808 | 2,358,433 |
| Personal Vehicle | 7,903,089 | 5,698,399 | 7,296,404 | 8,882,915 | 8,733,882 | 9,167,446 |
| Commercial       | 74,050    | 82,642    | 98,235    | 97,676    | 107,766   | 125,449   |

Source: U.S. DOT, Border Crossing Entry Data; TNDG.

TABLE C-10. LA PAZ COUNTY TRAVEL IMPACTS, 2014-2023

|  | 2014           | 2015           | 2016           | 2017           | 2018           | 2019           | 2020           | 2021           | 2022           | 2023           | 2022-2023 <sup>1</sup> | 2019-2023    | 2014-2023    |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------------|--------------|--------------|
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b>          |                |                |                |                |                |                |                |                |                |                |                        |              |              |
| Local Tax Receipts   | \$4.2          | \$4.4          | \$4.5          | \$5.3          | \$6.2          | \$6.2          | \$6.4          | \$7.2          | \$6.9          | \$7.0          | 1.7%                   | 13.4%        | 66.7%        |
| State Tax Receipts   | \$5.9          | \$6.1          | \$6.1          | \$6.4          | \$7.2          | \$7.3          | \$7.0          | \$7.9          | \$7.5          | \$7.7          | 2.5%                   | 4.9%         | 30.5%        |
| <b>Total<sup>1</sup></b>   | <b>\$10.1</b>  | <b>\$10.5</b>  | <b>\$10.6</b>  | <b>\$11.6</b>  | <b>\$13.5</b>  | <b>\$13.6</b>  | <b>\$13.4</b>  | <b>\$15.1</b>  | <b>\$14.5</b>  | <b>\$14.8</b>  | <b>2.1%</b>            | <b>8.8%</b>  | <b>46.5%</b> |
| <b>Direct Travel Spending (\$Millions)</b>                             |                |                |                |                |                |                |                |                |                |                |                        |              |              |
| Destination Spending   | \$136.0        | \$136.0        | \$136.3        | \$142.2        | \$159.6        | \$162.7        | \$152.2        | \$180.0        | \$183.9        | \$184.6        | 0.3%                   | 13.4%        | 35.7%        |
| Other Travel <sup>2</sup>  | \$4.6          | \$3.6          | \$3.1          | \$3.5          | \$4.0          | \$4.0          | \$2.2          | \$3.2          | \$3.9          | \$3.7          | -5.7%                  | -9.3%        | -19.6%       |
| <b>Total<sup>1</sup></b>   | <b>\$140.6</b> | <b>\$139.6</b> | <b>\$139.4</b> | <b>\$145.7</b> | <b>\$163.7</b> | <b>\$166.7</b> | <b>\$154.3</b> | <b>\$183.2</b> | <b>\$187.8</b> | <b>\$188.2</b> | <b>0.2%</b>            | <b>12.9%</b> | <b>33.9%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |                |                |                |                |                |                |                |                |                |                |                        |              |              |
| Hotel, Motel, STVR   | \$8.8          | \$10.3         | \$11.0         | \$12.9         | \$23.8         | \$23.6         | \$29.5         | \$33.0         | \$32.8         | \$29.6         | -9.6%                  | 25.4%        | 236.4%       |
| Private Home   | \$15.6         | \$15.6         | \$15.3         | \$16.2         | \$17.2         | \$16.9         | \$8.8          | \$16.7         | \$15.3         | \$15.2         | -1.1%                  | -10.1%       | -2.6%        |
| Campground   | \$31.4         | \$30.6         | \$30.4         | \$31.3         | \$32.5         | \$34.7         | \$32.0         | \$39.3         | \$42.3         | \$41.9         | -0.9%                  | 20.6%        | 33.4%        |
| 2nd Home   | \$17.5         | \$17.3         | \$17.6         | \$18.1         | \$18.9         | \$19.3         | \$1.9          | \$20.3         | \$21.7         | \$23.0         | 5.9%                   | 19.0%        | 31.4%        |
| Day Travel   | \$62.8         | \$62.1         | \$62.0         | \$63.7         | \$67.3         | \$68.2         | \$62.9         | \$70.8         | \$71.9         | \$74.9         | 4.2%                   | 9.9%         | 19.3%        |
| <b>Total<sup>1</sup></b>   | <b>\$136.0</b> | <b>\$136.0</b> | <b>\$136.3</b> | <b>\$142.2</b> | <b>\$159.6</b> | <b>\$162.7</b> | <b>\$152.2</b> | <b>\$180.0</b> | <b>\$183.9</b> | <b>\$184.6</b> | <b>0.3%</b>            | <b>13.4%</b> | <b>35.7%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |                |                |                |                |                |                |                |                |                |                |                        |              |              |
| Accommodations   | \$10.6         | \$11.4         | \$11.9         | \$12.7         | \$16.7         | \$17.5         | \$20.3         | \$23.0         | \$24.7         | \$23.9         | -3.3%                  | 37.1%        | 125.5%       |
| Food Service   | \$25.9         | \$27.4         | \$28.5         | \$30.2         | \$34.5         | \$35.5         | \$32.7         | \$40.5         | \$39.9         | \$41.4         | 3.8%                   | 16.8%        | 59.8%        |
| Food Stores  | \$13.4         | \$13.8         | \$13.7         | \$13.8         | \$14.5         | \$14.8         | \$13.5         | \$17.4         | \$17.3         | \$17.9         | 3.0%                   | 20.7%        | 33.6%        |
| Arts, Ent. & Rec.  | \$20.2         | \$16.2         | \$14.0         | \$15.6         | \$18.1         | \$18.1         | \$13.3         | \$20.4         | \$23.0         | \$21.0         | -8.6%                  | 15.9%        | 4.0%         |
| Local Tran. & Gas  | \$47.8         | \$48.8         | \$49.8         | \$51.1         | \$55.8         | \$56.7         | \$53.8         | \$55.8         | \$57.1         | \$58.8         | 3.0%                   | 3.7%         | 23.0%        |
| Retail Sales   | \$18.1         | \$18.4         | \$18.4         | \$18.7         | \$20.1         | \$20.2         | \$18.5         | \$23.0         | \$21.8         | \$21.5         | -1.4%                  | 6.8%         | 18.8%        |
| <b>Total<sup>1</sup></b>   | <b>\$136.0</b> | <b>\$136.0</b> | <b>\$136.3</b> | <b>\$142.2</b> | <b>\$159.6</b> | <b>\$162.7</b> | <b>\$152.2</b> | <b>\$180.0</b> | <b>\$183.9</b> | <b>\$184.6</b> | <b>0.3%</b>            | <b>13.4%</b> | <b>35.7%</b> |

Notes:

1. Details may not add to totals due to rounding. Percent change calculated on unrounded figures.
2. Other Travel includes ground transportation to other Arizona visitor destinations, resident air travel, travel arrangement services, and convention/trade show services.

Source: Arizona Office of Tourism, The Economic Impact of Travel in Arizona, 2023. Prepared by Dean Runyan Associates; TNDG.

TABLE C-11. YUMA COUNTY TRAVEL IMPACTS, 2014-2023

|  | 2014           | 2015           | 2016           | 2017           | 2018           | 2019           | 2020           | 2021           | 2022           | 2023           | 2022-2023 <sup>1</sup> | 2019-2023    | 2014-2023    |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------------|--------------|--------------|
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b>          |                |                |                |                |                |                |                |                |                |                |                        |              |              |
| Local Tax Receipts   | \$21.1         | \$21.6         | \$21.9         | \$22.4         | \$23.4         | \$23.5         | \$19.0         | \$24.3         | \$26.1         | \$26.5         | 1.7%                   | 12.7%        | 25.6%        |
| State Tax Receipts   | \$26.3         | \$26.5         | \$26.4         | \$28.1         | \$28.9         | \$29.7         | \$22.3         | \$28.8         | \$30.2         | \$31.1         | 3.0%                   | 4.6%         | 18.3%        |
| <b>Total<sup>1</sup></b>   | <b>\$47.4</b>  | <b>\$48.1</b>  | <b>\$48.3</b>  | <b>\$50.5</b>  | <b>\$52.2</b>  | <b>\$53.3</b>  | <b>\$41.3</b>  | <b>\$53.1</b>  | <b>\$56.3</b>  | <b>\$57.6</b>  | <b>2.4%</b>            | <b>8.2%</b>  | <b>21.5%</b> |
| <b>Direct Travel Spending (\$Millions)</b>                             |                |                |                |                |                |                |                |                |                |                |                        |              |              |
| Destination Spending   | \$590.4        | \$574.7        | \$564.1        | \$588.2        | \$597.7        | \$611.0        | \$439.8        | \$615.2        | \$680.8        | \$693.1        | 1.8%                   | 13.4%        | 17.4%        |
| Other Travel <sup>2</sup>  | \$60.8         | \$48.6         | \$42.0         | \$48.0         | \$53.2         | \$56.0         | \$28.0         | \$50.4         | \$62.4         | \$61.0         | -2.4%                  | 8.8%         | 0.3%         |
| <b>Total<sup>1</sup></b>   | <b>\$651.2</b> | <b>\$623.3</b> | <b>\$606.1</b> | <b>\$636.2</b> | <b>\$650.9</b> | <b>\$667.0</b> | <b>\$467.7</b> | <b>\$665.6</b> | <b>\$743.2</b> | <b>\$754.1</b> | <b>1.5%</b>            | <b>13.1%</b> | <b>15.8%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |                |                |                |                |                |                |                |                |                |                |                        |              |              |
| Hotel, Motel, STVR   | \$137.7        | \$145.8        | \$150.6        | \$165.5        | \$166.1        | \$171.4        | \$132.1        | \$200.5        | \$218.4        | \$207.7        | -4.9%                  | 21.2%        | 50.8%        |
| Private Home   | \$90.8         | \$88.6         | \$87.2         | \$91.6         | \$94.7         | \$98.3         | \$47.9         | \$94.9         | \$108.7        | \$109.0        | 0.3%                   | 10.9%        | 20.0%        |
| Campground   | \$66.9         | \$65.3         | \$64.9         | \$66.8         | \$70.4         | \$75.5         | \$67.6         | \$62.7         | \$67.5         | \$66.9         | -0.9%                  | -11.4%       | 0.0%         |
| 2nd Home   | \$49.5         | \$49.6         | \$50.4         | \$51.7         | \$53.9         | \$55.4         | \$54.4         | \$58.3         | \$62.3         | \$66.9         | 7.3%                   | 20.7%        | 35.2%        |
| Day Travel   | \$245.4        | \$225.4        | \$211.0        | \$212.7        | \$212.5        | \$210.2        | \$137.8        | \$198.7        | \$223.9        | \$242.5        | 8.3%                   | 15.4%        | -1.2%        |
| <b>Total<sup>1</sup></b>   | <b>\$590.4</b> | <b>\$574.7</b> | <b>\$564.1</b> | <b>\$588.2</b> | <b>\$597.7</b> | <b>\$611.0</b> | <b>\$439.8</b> | <b>\$615.2</b> | <b>\$680.8</b> | <b>\$693.1</b> | <b>1.8%</b>            | <b>13.4%</b> | <b>17.4%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |                |                |                |                |                |                |                |                |                |                |                        |              |              |
| Accommodations   | \$62.1         | \$67.2         | \$70.4         | \$77.1         | \$78.7         | \$83.2         | \$75.7         | \$98.4         | \$113.6        | \$109.8        | -3.3%                  | 32.1%        | 76.8%        |
| Food Service   | \$119.2        | \$122.4        | \$126.0        | \$133.4        | \$136.8        | \$142.5        | \$101.1        | \$150.4        | \$161.1        | \$169.0        | 4.9%                   | 18.6%        | 41.8%        |
| Food Stores  | \$78.4         | \$74.3         | \$69.6         | \$69.0         | \$68.3         | \$68.1         | \$47.0         | \$66.8         | \$75.5         | \$81.8         | 8.3%                   | 20.1%        | 4.3%         |
| Arts, Ent. & Rec.  | \$73.2         | \$57.5         | \$49.2         | \$55.0         | \$59.9         | \$60.4         | \$34.9         | \$60.7         | \$73.3         | \$67.9         | -7.4%                  | 12.3%        | -7.2%        |
| Local Tran. & Gas  | \$117.6        | \$120.6        | \$123.7        | \$128.5        | \$129.8        | \$133.8        | \$101.6        | \$120.0        | \$126.8        | \$129.1        | 1.9%                   | -3.5%        | 9.8%         |
| Retail Sales   | \$126.4        | \$117.6        | \$110.9        | \$110.4        | \$108.5        | \$106.4        | \$71.4         | \$105.7        | \$114.3        | \$118.7        | 3.8%                   | 11.6%        | -6.1%        |
| <b>Total<sup>1</sup></b>   | <b>\$590.4</b> | <b>\$574.7</b> | <b>\$564.1</b> | <b>\$588.2</b> | <b>\$597.7</b> | <b>\$611.0</b> | <b>\$439.8</b> | <b>\$615.2</b> | <b>\$680.8</b> | <b>\$693.1</b> | <b>1.8%</b>            | <b>13.4%</b> | <b>17.4%</b> |

Notes:

1. Details may not add to totals due to rounding. Percent change calculated on unrounded figures.
2. Other Travel includes ground transportation to other Arizona visitor destinations, resident air travel, travel arrangement services, and convention/trade show services.

Source: Arizona Office of Tourism, The Economic Impact of Travel in Arizona, 2023. Prepared by Dean Runyan Associates; TNDG.

**TABLE C-12. ANNUAL RETAIL SALES (2019-2024)**

|               | 2019             | 2020             | 2021             | 2022             | 2023             | 2024              |
|---------------|------------------|------------------|------------------|------------------|------------------|-------------------|
| La Paz County | \$161,288,753    | \$177,914,116    | \$182,710,862    | \$199,646,528    | \$218,965,547    | \$231,200,015     |
| Yuma County   | \$1,736,518,686  | \$1,838,334,018  | \$2,077,658,376  | \$2,282,869,317  | \$2,333,585,841  | \$2,389,074,741   |
| CRR           | \$1,897,807,439  | \$2,016,248,134  | \$2,260,369,238  | \$2,482,515,845  | \$2,552,551,388  | \$2,620,274,756   |
| Arizona       | \$71,664,594,902 | \$74,712,426,965 | \$86,248,391,045 | \$97,186,669,342 | \$99,927,786,657 | \$102,098,870,875 |

Notes

1. By tax-processing month (not sales month)
2. Arizona state figures drawn from ADOR FY Annual Reports

Source: Arizona Department of Revenue and U.S. Economic Research; TNDG.

**TABLE C-13. RETAIL SALES PERCENTAGE GROWTH (2019-2024)**

|               | 2020  | 2021  | 2022  | 2023 | 2024 | Annual Growth (2019-2024) |
|---------------|-------|-------|-------|------|------|---------------------------|
| La Paz County | 10.3% | 2.7%  | 9.3%  | 9.7% | 5.6% | 6.2%                      |
| Yuma County   | 5.9%  | 13.0% | 9.9%  | 2.2% | 2.4% | 5.5%                      |
| CRR           | 6.2%  | 12.1% | 9.8%  | 2.8% | 2.7% | 5.5%                      |
| Arizona       | 4.3%  | 15.4% | 12.7% | 2.8% | 2.2% | 6.1%                      |

Notes

1. By tax-processing month (not sales month)
2. Arizona state figures drawn from ADOR FY Annual Reports

Source: Arizona Department of Revenue and U.S. Economic Research; TNDG.

**TABLE C-14. ANNUAL RESTAURANT AND BAR SALES (2019-2024)**

|               | 2019             | 2020             | 2021             | 2022             | 2023             | 2024             |
|---------------|------------------|------------------|------------------|------------------|------------------|------------------|
| La Paz County | \$38,957,958     | \$38,145,385     | \$46,821,256     | \$60,155,087     | \$64,216,915     | \$66,183,034     |
| Yuma County   | \$313,887,111    | \$313,633,889    | \$388,352,362    | \$438,682,842    | \$464,482,942    | \$479,308,280    |
| CRR           | \$352,845,069    | \$351,779,274    | \$435,173,618    | \$498,837,929    | \$528,699,857    | \$545,491,314    |
| Arizona       | \$15,232,888,157 | \$14,471,699,590 | \$15,248,825,630 | \$19,532,365,621 | \$21,672,944,725 | \$22,302,649,687 |

Notes

1. By tax-processing month (not sales month)
2. Arizona state figures drawn from ADOR FY Annual Reports

Source: Arizona Department of Revenue and U.S. Economic Research; TNDG.

**TABLE C-15. RESTAURANT AND BAR SALES PERCENTAGE GROWTH (2019-2024)**

|               | 2020  | 2021  | 2022  | 2023  | 2024 | Annual Growth<br>(2019-2024) |
|---------------|-------|-------|-------|-------|------|------------------------------|
| La Paz County | -2.1% | 22.7% | 28.5% | 6.8%  | 3.1% | 9.2%                         |
| Yuma County   | -0.1% | 23.8% | 13.0% | 5.9%  | 3.2% | 7.3%                         |
| CRR           | -0.3% | 23.7% | 14.6% | 6.0%  | 3.2% | 7.5%                         |
| Arizona       | -5.0% | 5.4%  | 28.1% | 11.0% | 2.9% | 6.6%                         |

Notes

1. By tax-processing month (not sales month)
2. Arizona state figures drawn from ADOR FY Annual Reports

Source: Arizona Department of Revenue and U.S. Economic Research; TNDG.

**TABLE C-16. ANNUAL HOTEL/MOTEL RECEIPTS (2019-2024)**

|               | 2019            | 2020            | 2021            | 2022            | 2023            | 2024            |
|---------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| La Paz County | \$11,776,165    | \$14,557,731    | \$16,974,463    | \$17,873,802    | \$16,726,463    | \$16,618,736    |
| Yuma County   | \$61,669,506    | \$60,334,909    | \$75,817,591    | \$90,073,356    | \$85,304,581    | \$75,887,922    |
| CRR           | \$73,445,671    | \$74,892,640    | \$92,792,054    | \$107,947,158   | \$102,031,044   | \$92,506,658    |
| Arizona       | \$3,646,903,681 | \$2,805,265,120 | \$2,460,566,716 | \$4,160,293,305 | \$4,546,069,453 | \$4,538,549,631 |

Notes

1. By tax-processing month (not sales month)
2. Arizona state figures drawn from ADOR FY Annual Reports

Source: Arizona Department of Revenue and U.S. Economic Research; TNDG.

**TABLE C-17. HOTEL/MOTEL RECEIPTS PERCENTAGE GROWTH (2019-2024)**

|               | 2020   | 2021   | 2022  | 2023  | 2024   | Annual Growth<br>(2019-2024) |
|---------------|--------|--------|-------|-------|--------|------------------------------|
| La Paz County | 23.6%  | 16.6%  | 5.3%  | -6.4% | -0.6%  | 5.9%                         |
| Yuma County   | -2.2%  | 25.7%  | 18.8% | -5.3% | -11.0% | 3.5%                         |
| CRR           | 2.0%   | 23.9%  | 16.3% | -5.5% | -9.3%  | 3.9%                         |
| Arizona       | -23.1% | -12.3% | 69.1% | 9.3%  | -0.2%  | 3.7%                         |

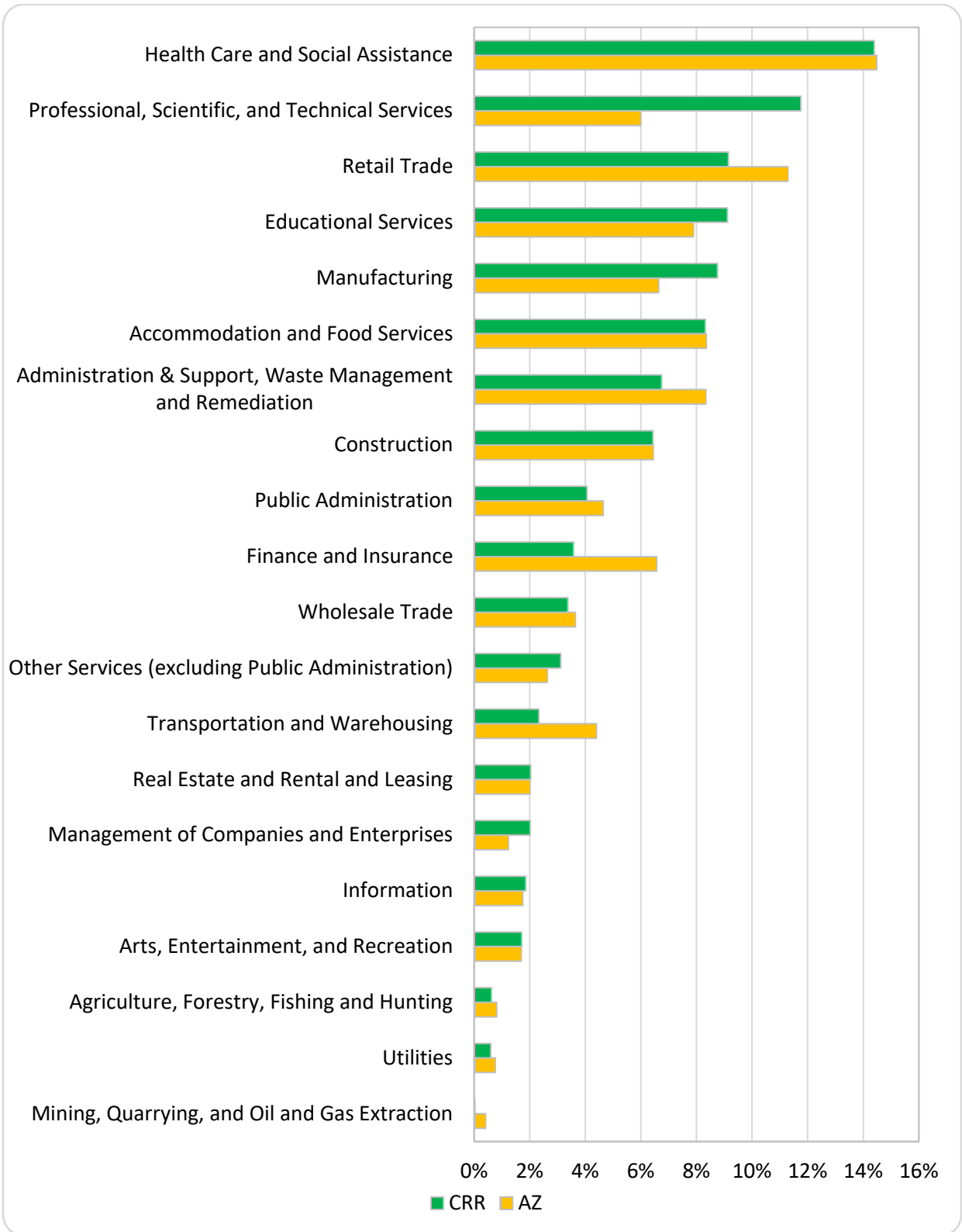
Notes

1. By tax-processing month (not sales month)
2. Arizona state figures drawn from ADOR FY Annual Reports

Source: Arizona Department of Revenue and US Economic Research; TNDG.

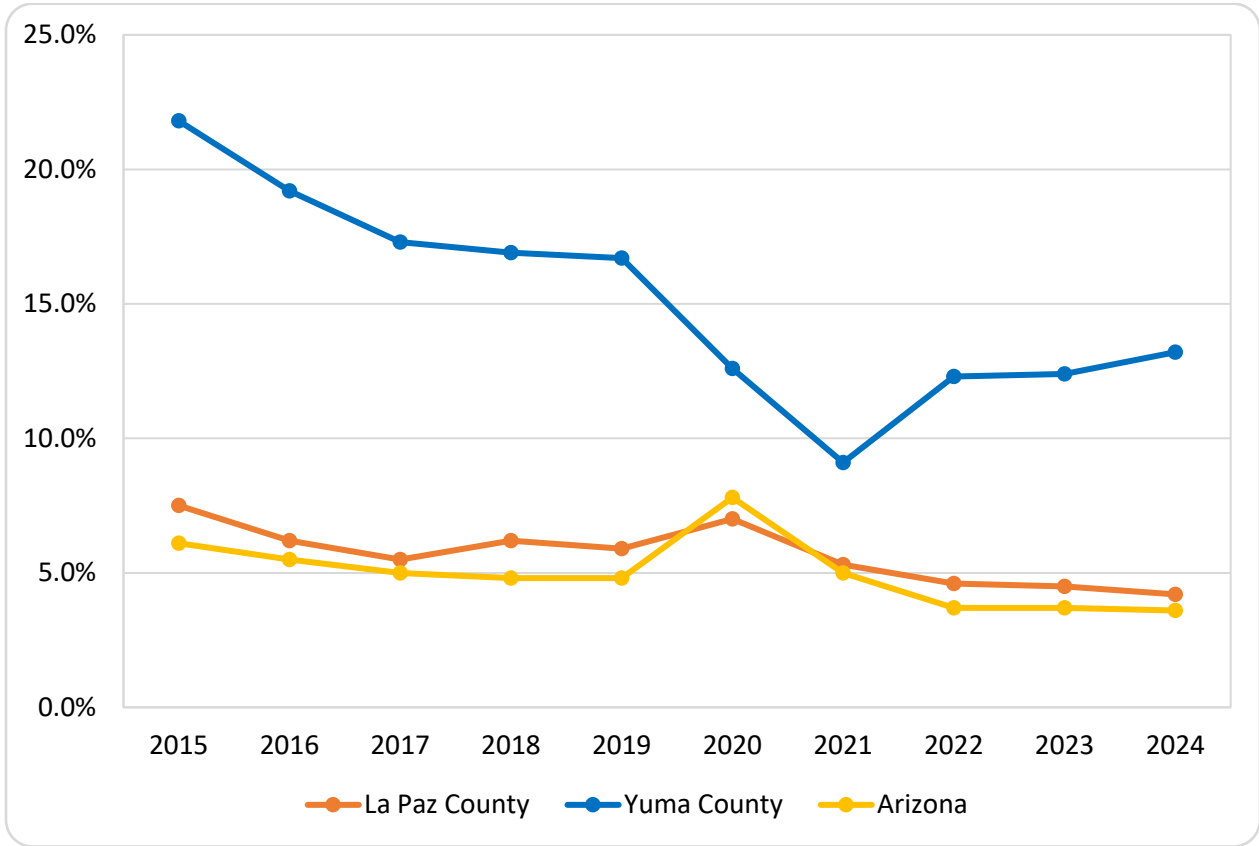


FIGURE C-1. EMPLOYMENT BY INDUSTRY FOR CRR AND AZ



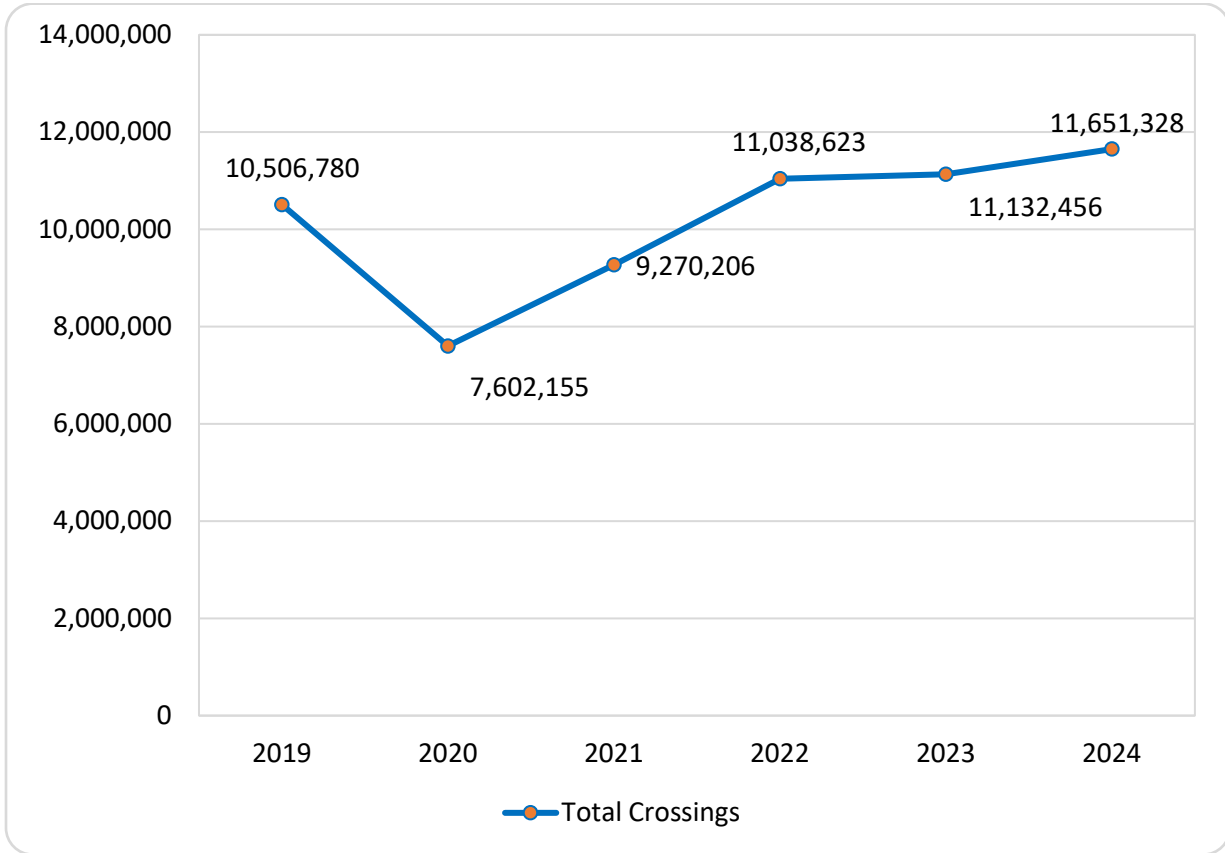
Source: U.S. Census Bureau, OnTheMap LEHD Origin-Destination Employment 2022; TNDG.

FIGURE C-2. ANNUAL UNEMPLOYMENT RATES, LA PAZ COUNTY, YUMA COUNTY, AND AZ (2015-2024)



Source: Arizona Office of Economic Opportunity; TNDG.

FIGURE C-3. TRAFFIC COUNTS AT THE SAN LUIS BORDER CROSSING BY TYPE BY YEAR (2019-2024)



Source: U.S. DOT, Border Crossing Entry Data; TNDG.