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FARGO**



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2015

AVIATION

AEROSPACE

BUSINESS SERVICES

DEFENSE

EDUCATION

ENTERTAINMENT

ENTREPRENEURSHIP

HEALTHCARE

INNOVATION

LIFE SCIENCES

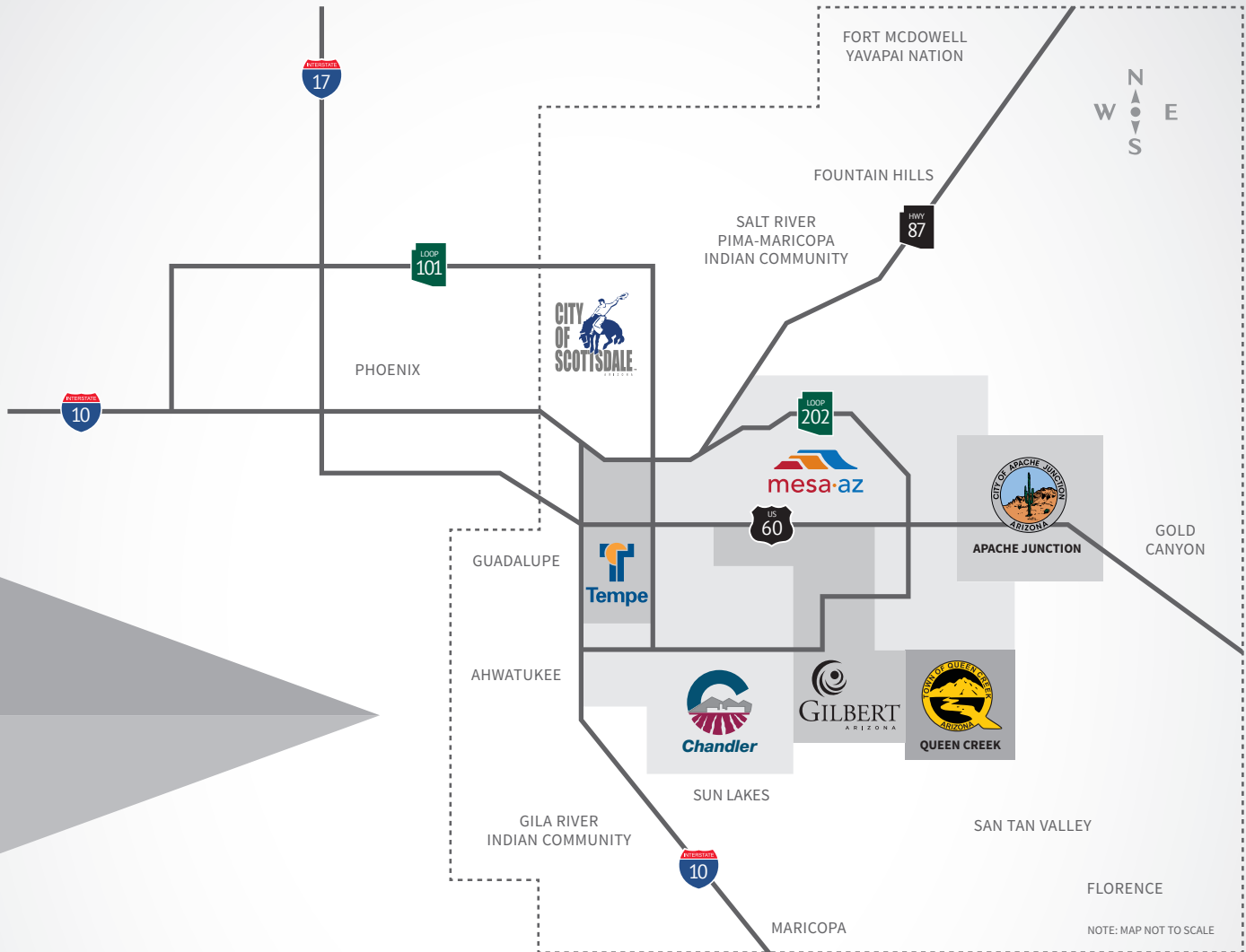
RETAIL

TECHNOLOGY

TOURISM

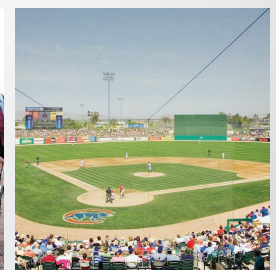


PHX EAST VALLEY
Talent • Growth • Opportunity

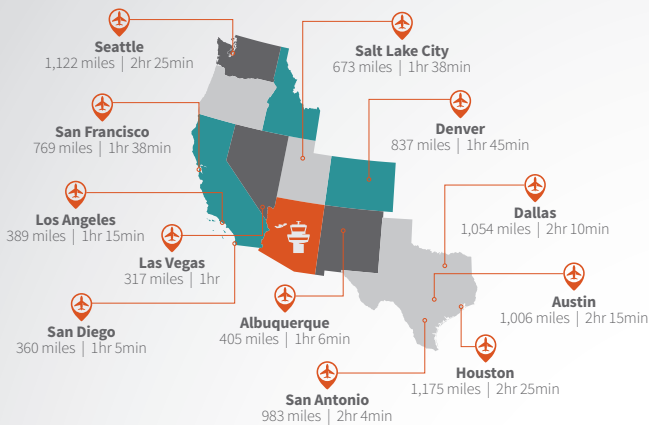


THE PHX EAST VALLEY IS A DYNAMIC REGION OF THE SOUTHWESTERN UNITED STATES that has experienced tremendous growth over the past twenty-five years. Collaborative dialogue between civic, political, business, and educational leaders, coupled with thoughtful regional planning efforts has resulted in a robust and vital economy with regional assets such as...

- ▶ Highly-Skilled, Young Workforce
- ▶ Robust Infrastructure
- ▶ Global, Innovative Brands
- ▶ Diverse Real Estate
- ▶ Ideal Climate

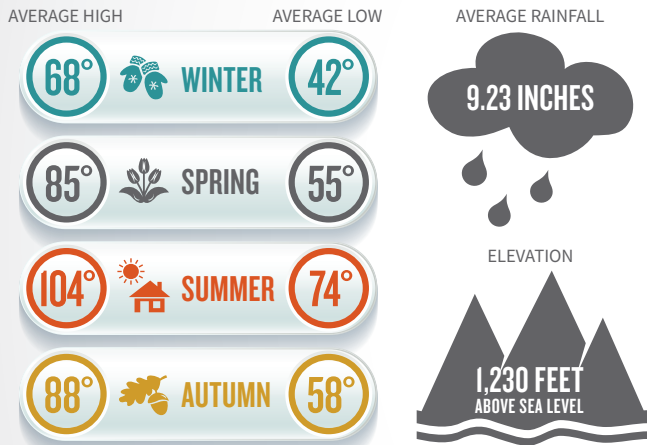


MILEAGE



■ SOURCE: PHX Sky Harbor Airport

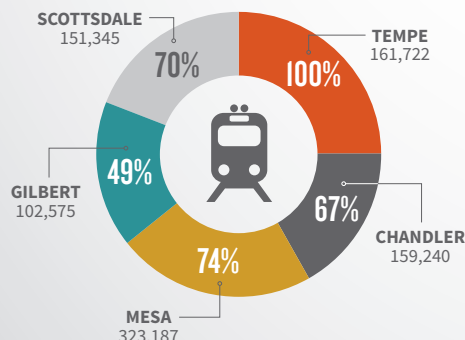
CLIMATE



■ SOURCE: Western Region Climate Center

PUBLIC TRANSIT

Public transportation in the PHX East Valley is provided by Valley Metro regional transit service and offers bus and light rail routes, as well as car and vanpool programs. The light rail network serves Tempe and Mesa, and a rail extension into downtown Mesa is expected to begin operating in 2015.



Percent of population within walking distance 1/2 mile to a public transit stop.

■ SOURCE: Valley Metro

AIR

PHX East Valley has a long history of aviation & aerospace assets, with two commercial service hubs coupled with two of the busiest general aviation airports in the country that also serve as relievers.

COMMERCIAL AVIATION

Phoenix Sky Harbor Airport (PHX):

- ▶ One of the 10 busiest airports in the United States
- ▶ Daily economic impact of \$79 million
- ▶ Typical day at Sky Harbor: 1,200+ aircraft arrive and depart, carrying 100,000+ passengers, and handling 800+ tons of air cargo



Phoenix-Mesa Gateway Airport (AZA):

- ▶ Hosts more than 40 companies
- ▶ Serves 35 cities with non-stop service via Allegiant Airlines as well as continuing service to many more destinations
- ▶ Contributes \$1.3 billion annually to the Arizona economy
- ▶ Developing an international aerospace center with aircraft maintenance, modification, testing, and pilot training
- ▶ Designated as Foreign Trade Zone #221, as well as a Military Reuse Zone, offering aviation companies a significant financial edge in the global marketplace



GENERAL AVIATION

Chandler Municipal Airport (CHD)

- ▶ Excellent business airport, it is also a base for charter, transport, and sightseeing excursions, and is home to world-class training institutions
- ▶ Anchors the Airpark Area, a 9-square mile Employment Corridor. By 2025, experts suggest the Airpark Area employment corridor will be home to more than 25,000 jobs and more than 25 million square feet of non-residential space. Numerous parcels surrounding the airport are available for commercial development. This area also features a 23-acre land parcel with the option for rare Through-the Fence access into the airport.
- ▶ Home to a world-class heliport facility



Falcon Field Airport (FFZ)

- ▶ Two runways of 5,100 and 3,800 feet accommodate a wide variety of fixed-wing aircraft and helicopters
- ▶ More than 80 on-airport businesses provide aviation services - fueling, maintenance and repairs, inspections, avionics, aircraft painting and aircraft interiors - to support aircraft operations, manufacturing, or research & development activities.



■ SOURCES: Individual airports as listed above.

HIGHWAYS



US 60

- ▶ East-west corridor
- ▶ Intersects Loop 101 and Loop 202



Loop 202

- ▶ 55-mile beltway circulating the PHX East Valley
- ▶ Surrounds the cities of Tempe, Mesa, Chandler, and Gilbert



Loop 101

- ▶ Semi-beltway encompassing much of the Greater Phoenix area
- ▶ Links Chandler, Tempe, Mesa, and Scottsdale
- ▶ Provides easy access to city centers and ASU's Tempe campus

PHX East Valley is also served by major interstate routes including Interstate 10 (east-west from FL to CA), Interstate 8 (east-west from AZ to CA), and Interstate 19 (north-south to Mexico).

■ SOURCE: Valley Metro



PUBLIC

Arizona State University

- ▶ Tempe Campus 50,523
- ▶ Polytechnic (Mesa) Campus 4,183

Northern Arizona University (NAU)

- ▶ Extended Campuses located in: Apache Junction, Community @ Queen Creek, Chandler-Gilbert and Mesa 1,589

PRIVATE

- A.T. Still University 1,199
- Benedictine University 213
- Ottawa University (Chandler/Queen Creek) 430
- University of Phoenix 7,384*
- Upper Iowa University 115
- Western International University 1,787*
- Wilkes University 25

COMMUNITY COLLEGES

Maricopa Community College District

- ▶ Chandler-Gilbert Community College 14,399
- ▶ Mesa Community College 22,711
- ▶ Rio Salado College (total online students) 20,654
- ▶ Scottsdale Community College 11,000

Central Arizona College

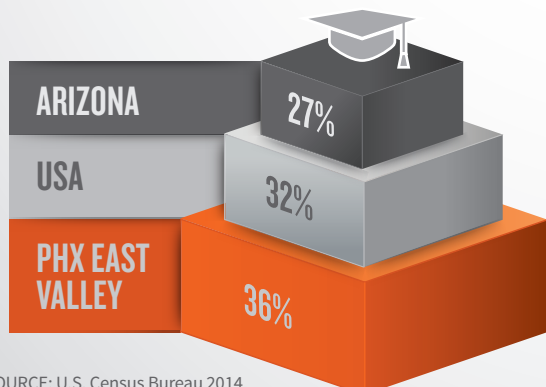
- ▶ Superstition Mountain Campus, Maricopa and SanTan Centers 925

*Fall 2014 enrollment numbers unavailable; 2013 enrollment numbers listed.

Total PHX East Valley Higher Education Enrollment – 137,137



PERCENTAGE OF THE POPULATION AGE 25+ WHO HAVE EARNED A BACHELOR'S DEGREE OR HIGHER



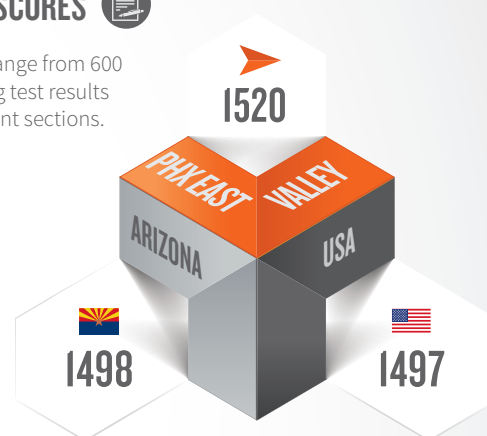
■ SOURCE: U.S. Census Bureau 2014

EAST VALLEY ENROLLMENT



AVERAGE SAT SCORES

Note: SAT scores range from 600 to 2400, combining test results from three 800-point sections.



■ SOURCE: College Board

AVERAGE ACT SCORES

*East Valley ACT data does not include the Town of Gilbert because scores were not available. ACT composite scores reflect overall performance, with scores ranging from 1 to 36.



■ SOURCE: ACT.org



*Special thanks to Dr. Joe O'Reilly of Mesa Public Schools for collaborating with and compiling data from PHX East Valley school districts, to determine average scores as reflected above.

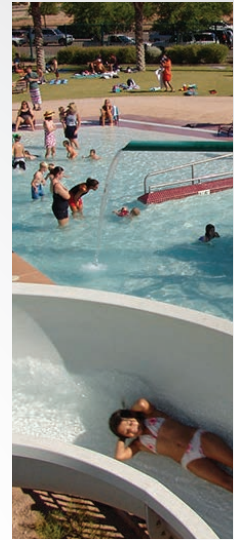
POPULATION GROWTH



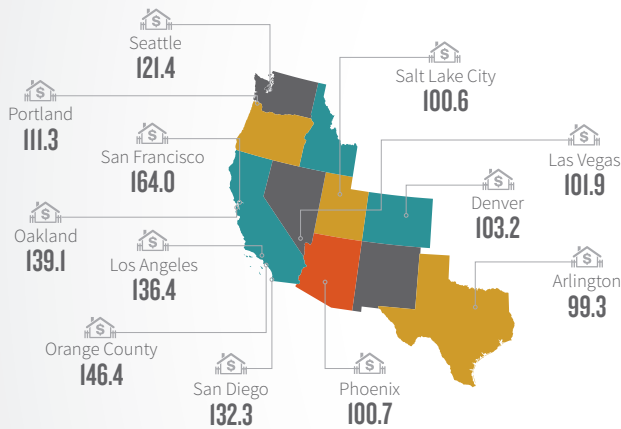
2010	2014	2020
PHX EAST VALLEY*		
➤ 1,327,279	➤ 1,405,116	➤ 1,537,498
ARIZONA		
➤ 6,392,017	➤ 6,626,624	➤ 7,485,117
METRO DENVER		
➤ 2,581,506	➤ 2,697,476	➤ 3,290,001
LAS VEGAS		
➤ 1,563,282	➤ 2,027,868	➤ 2,937,591
METRO SAN DIEGO		
➤ 2,813,833	➤ 3,211,252	➤ 3,459,858
SALT LAKE CITY		
➤ 968,858	➤ 1,140,483	➤ 1,185,036

*Includes Scottsdale

■ SOURCE: SRP, AZ State Demographer's Office



COST OF LIVING



■ SOURCE: U.S. Census Bureau 2014

MEDIAN HOUSEHOLD INCOME



PHX EAST VALLEY

\$62,533



MARICOPA COUNTY

\$54,385



ARIZONA

\$48,510



USA

\$52,250



■ SOURCE: Maricopa Association of Governments (MAG), Information Services Division & Census ACS

MEDIAN SALES PRICE FOR EXISTING SINGLE FAMILY HOME



\$275,600

\$158,100

\$167,100

\$204,362

USA

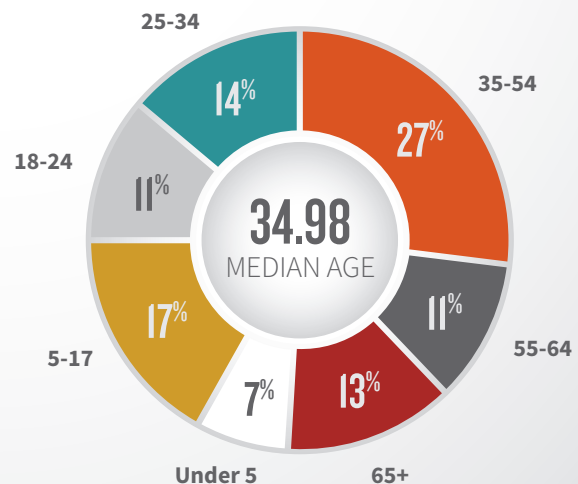
ARIZONA

MARICOPA COUNTY

PHX EAST VALLEY

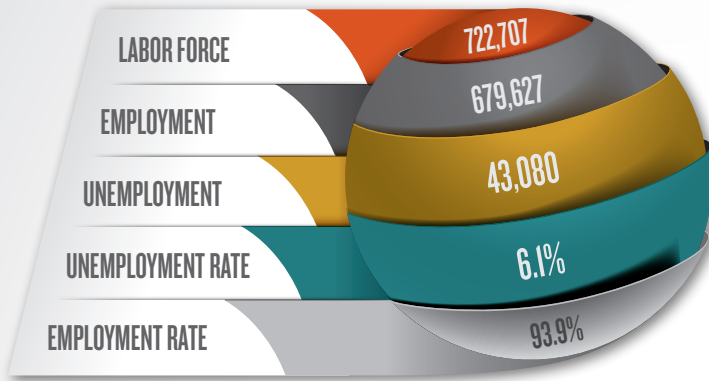
■ SOURCE: U.S. Census Bureau 2014

AGE BREAKDOWN – PHX EAST VALLEY RESIDENTS



■ SOURCE: U.S. Census Bureau 2014

EMPLOYMENT STATUS

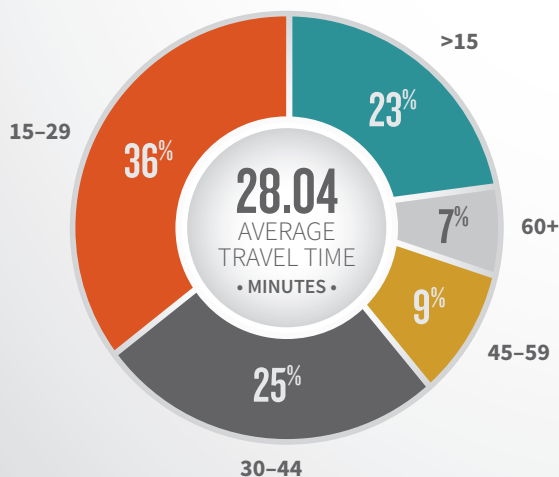


■ SOURCE: laborstats.az.gov
NOTE: Includes Scottsdale.



COMMUTE

PHX East Valley travel time to work in minutes



■ SOURCE: U.S. Census Bureau 2014

WORKFORCE WAGES

ARCHITECTURE & ENGINEERING

Mean Hourly **\$36.78**
Mean Annual **\$76,500**

ARTS, DESIGN, ENTERTAINMENT, SPORTS & MEDIA

Mean Hourly **\$23.32**
Mean Annual **\$48,500**

BUSINESS & FINANCIAL

Mean Hourly **\$30.07**
Mean Annual **\$64,080**

COMMUNITY & SOCIAL SERVICES

Mean Hourly **\$20.51**
Mean Annual **\$42,650**

COMPUTER & MATHEMATICAL

Mean Hourly **\$37.58**
Mean Annual **\$78,170**

CONSTRUCTION & EXTRACTION

Mean Hourly **\$19.79**
Mean Annual **\$41,170**

EDUCATION, TRAINING, & LIBRARY

Mean Hourly **\$22.11**
Mean Annual **\$45,990**

FOOD PREPARATION

Mean Hourly **\$10.82**
Mean Annual **\$22,500**

HEALTHCARE PRACTITIONER & TECHNICAL

Mean Hourly **\$37.20**
Mean Annual **\$77,370**

HEALTHCARE SUPPORT

Mean Hourly **\$14.19**
Mean Annual **\$31,070**

INSTALLATION, MAINTENANCE, & REPAIR

Mean Hourly **\$21.58**
Mean Annual **\$44,880**

LEGAL

Mean Hourly **\$48.70**
Mean Annual **\$101,290**

LIFE, PHYSICAL, AND SOCIAL SCIENCES

Mean Hourly **\$28.89**
Mean Annual **\$60,090**

MANAGEMENT

Mean Hourly **\$49.82**
Mean Annual **\$103,620**

OFFICE AND ADMINISTRATIVE SUPPORT

Mean Hourly **\$16.80**
Mean Annual **\$34,930**

PERSONAL CARE

Mean Hourly **\$12.00**
Mean Annual **\$24,970**

PRODUCTION

Mean Hourly **\$16.56**
Mean Annual **\$34,450**

PROTECTIVE SERVICE

Mean Hourly **\$20.60**
Mean Annual **\$42,850**

SALES

Mean Hourly **\$18.37**
Mean Annual **\$38,210**

TRANSPORTATION & MATERIAL MOVING

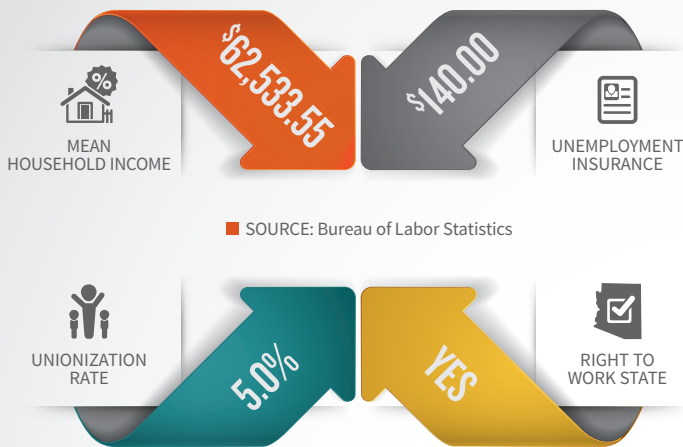
Mean Hourly **\$17.09**
Mean Annual **\$35,550**

■ SOURCE: Bureau of Labor Statistics



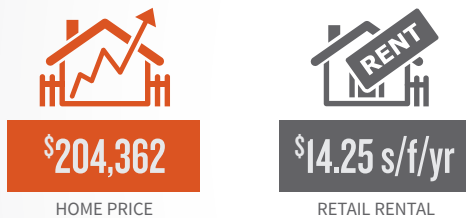
COST OF DOING BUSINESS / INSTITUTIONS

LABOR



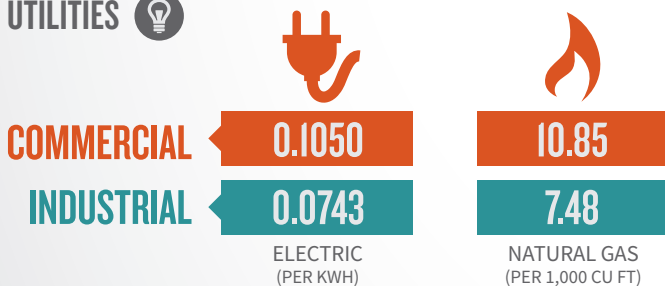
■ SOURCE: Bureau of Labor Statistics

REAL ESTATE



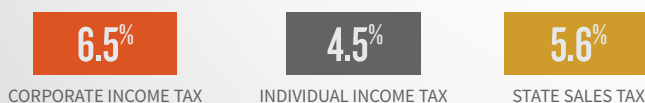
■ SOURCE: Bureau of Labor Statistics

UTILITIES



■ SOURCE: US Energy Information Administration

TAXES



Arizona's personal income tax system consists of five brackets and a top rate of 4.54%. That rate ranks 12th lowest among states levying an individual income tax. Arizona's state and local income tax collections per person were \$445 in 2011 which ranked 10th lowest nationally.

■ SOURCE: TaxFoundation.org

ADVANCED TECHNOLOGIES

First Solar
Freescale Semiconductor
Honeywell
Intel Corp. – Chandler Campus
Intel Corp. – Ocotillo Campus
Marvell Technologies
Microchip Technologies

AVIATION/AEROSPACE/DEFENSE

Able Engineering
ArmorWorks
AZ Labs
The Boeing Company
CAE – Oxford Aviation
Chandler Airport
Falcon Field
General Dynamics C4 Systems
Honeywell
Lockheed Martin
MD Helicopters
Nammo Talley
Orbital Sciences
Pegasus Airport
Phoenix-Mesa Gateway Airport
Scottsdale Airport
Stellar Airport

ADVANCED BUSINESS SERVICES

Avnet
CDW
CenturyLink
Chase Bank
Empire Southwest
FedEx
Go Daddy
Insight
PayPal
UPS
Verizon Wireless
Wells Fargo

HEALTHCARE & LIFE SCIENCES

Banner Baywood Medical Center
Banner Desert Medical Center
Banner Goldfield
Banner Heart Hospital
Banner Ironwood Medical Center
Banner/MD Anderson Cancer Center
Celebration Stem Cell
Chandler Regional Hospital
East Valley Diagnostic Imaging
Gilbert Hospital
Mercy Gilbert Hospital
Mountain Vista Medical Center
Phoenix Children's Hospital at Dignity
Health's Mercy Gilbert Medical Center
Rural Metro/Southwest Ambulance

CULTURAL VENUES

ASU Gammage
Chandler Center for the Arts
Chandler-Gilbert Community College Performing Arts Center
Evelyn Smith Music Theatre at ASU
Fountain Hills Theatre
Hale Centre Theatre
Higley Center for the Performing Arts
Mesa Arts Center
Mesa Community College Theatre Outback
Queen Creek Performing Arts Center
Scottsdale Center for the Performing Arts
Tempe Center for the Arts
Tempe Performing Arts Center

EDUCATION

Arizona State University-Polytechnic Campus
Arizona State University-Tempe
AT Still University
Central Arizona College-Superstition Mountain Campus
Chandler Gilbert Community College (Multiple Campuses)
Communiversity @ Queen Creek
East Valley Institute of Technology
Everest College
Grand Canyon University
Pima Medical Institute
Maricopa Community College District
Mesa Community College
Mesa Community College-Red Mountain
NAU – East Valley Campus
Ottawa University
Rio Salado College
Scottsdale Community College
St. Xavier University (Opening August 2015)
University of Advancing Technology
University of Arizona
University of Phoenix
Western International University

INNOVATION & ENTREPRENEURSHIP CENTERS

Advanced Technology Innovation Center @ ASU Poly
ASU Research Park
ASU SkySong
ASU Techshop
Biodesign Institute
Gangplank
Innovations Science & Technology Incubator Chandler
Launchspot

SPRING TRAINING FACILITIES

Cubs Stadium (Chicago Cubs)
Hohokam Stadium (Oakland A's)
Salt River Fields at Talking Stick (Arizona Diamondbacks, Colorado Rockies)
Scottsdale Stadium (San Francisco Giants)
Tempe Diablo Stadium (Los Angeles Angels of Anaheim)

APACHE JUNCTION | CHANDLER | GILBERT | MESA | QUEEN CREEK | TEMPE

Ahwatukee | Florence | Fort McDowell Yavapai Nation | Fountain Hills | Gila River Indian Community | Gold Canyon | Guadalupe
Maricopa | Salt River Pima-Maricopa Indian Community | San Tan Valley | Scottsdale | Sun Lakes

SURROUNDING COMMUNITIES



The East Valley Partnership (EVP) is a regional coalition of community, business, educational, and government leaders whose goal is to provide leadership and support in specific areas of focus, thereby improving business and quality of life in the region. EVP is dedicated to the economic development and promotion of the East Valley. EVP actively advocates in areas such as economic development, education, aviation, and aerospace, transportation and others.

For more information, visit www.EVP-AZ.org

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BUSINESS BANKING

Rhonda Curtis 480-396-1885 • Southeast Valley
Keri Armstrong 480-644-8346 • Mesa/Agriculture
Tim Billings 480-377-1554 • Tempe

CONTRIBUTORS

EDITOR: Megan Sterling
RESEARCH EDITOR: Craig Dudek
LAYOUT & DESIGN: Aaron DeCarlo, Dune Media
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