

# **EMPLOYMENT CENTERS IN METROPOLITAN PHOENIX**

**A Report From the Office of the University Economist**

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## SUMMARY

In Maricopa County, 28 employment centers were identified based on 2021 employment data. An employment center is a contiguous area with total employment at least 8,875, employment density (employment per square mile) of at least 4,650, and employment per 1,000 residents of more than 410. An employment center with an employment density of less than 5,675 is considered to be marginal.

Ten of the employment centers form a contiguous area, stretching west from northwest Tempe to west of downtown Phoenix, then north along Central Avenue and east along Camelback Road. The employment density exceeded 5,675 in each of these centers except the area encompassing Sky Harbor Airport, which has much of its land area dedicated to the airport's runways.

South and east of northwest Tempe, six more centers are nearly contiguous, extending east into downtown Mesa, and southeast into Chandler. Only one of these employment centers had an employment density of less than 5,675. In addition to this large, nearly contiguous area, 12 outlying employment centers are located in Phoenix, Scottsdale, Mesa, and Chandler. Four of these 12 outlying centers had an employment density of less than 5,675.

Employment centers in Metro Phoenix are disproportionately located southeast of downtown Phoenix, extending to east of the alignment of 88th Street. The most westerly edge of one employment center is 59th Avenue, but otherwise no center extends west of 35th Avenue.

The 28 employment centers range in size from about three-fourths of a square mile to around 5 square miles, with an average of 2.94 square miles. Combined, the 28 centers cover just 0.9 percent of Maricopa County's land area, but accounted for 37 percent of the county's employment in 2021. Average employment per center was approximately 24,500 and the average density was 8,326 workers per square mile. Each center had employment per 1,000 residents far in excess of the 410 criterion.

Employment growth between 2007 and 2021 in the 28 employment centers combined was 22 percent, a little less than the county's 27 percent. Each of the six centers with an employment density of more than 10,000 in 2021 are long established, located in the core area of Metro Phoenix, and experienced average or below-average employment growth: downtown Phoenix, the area along the Papago Freeway in central Phoenix, midtown Phoenix, the area around the state capital, downtown Tempe, and downtown Scottsdale.

In contrast, of the eight employment centers with employment growth of more than 50 percent between 2007 and 2021, seven are located well away from the Metro Phoenix core: two in Chandler, one in Mesa, one in north Scottsdale, two along the I-17 Freeway in north Phoenix, and one along the I-10 Freeway in west Phoenix. The exception is downtown Tempe, the only employment center with a density of more than 10,000 in 2021 and employment growth between 2007 and 2021 of more than 50 percent. In general, employment growth rates are highest well away from the metro core but within the fringe of the urbanized area, but most of these fast-growth areas in 2021 did not have enough employment or employment density to meet the criteria of an employment center.

## INTRODUCTION

This report is based on the latest (2021) version of the Employer Database produced by the Maricopa Association of Governments (MAG), which was released at the end of November 2022, as well as MAG employer databases for 1995, 2000, 2007, and 2014. The 1995 and 2000 databases were examined previously by one of the authors of this report.<sup>1</sup>

The early MAG employer databases were limited to Maricopa County. After 2010, MAG expanded its efforts to include Pinal County, with subsequent expansion to the entire state. This report is limited to Metropolitan Phoenix (Maricopa and Pinal counties), but no significant employment concentrations currently exist in Pinal County.

The creation of the MAG Employer Database begins with information from a number of sources, most notably Dun & Bradstreet, which produces business directories, and the Maricopa County Trip Reduction Program. The latter collects data from employees working at establishments of at least 50 workers.

The 2021 MAG Employer Database includes every establishment with employment of at least five.<sup>2</sup> In addition to the company name, address, and employment, the location of each establishment is provided by its latitude and longitude coordinates. Using these coordinates, the location of each establishment was coded by the authors into two units of geography used by MAG: Regional Analysis Zones (RAZs) and Traffic Analysis Zones (TAZs, which are subdivisions of RAZs). RAZs vary widely in size. Of the 38 RAZs with the highest employment densities, the size ranges from 5.9-to-16.8 square miles. TAZs also vary considerably in size; the median is 1 square mile. This analysis identifies employment “centers” as aggregations of contiguous TAZs.

The boundaries of the TAZs change frequently. Changes to RAZs have been limited to outlying RAZs in which no employment centers are present. In order to be able to compare TAZs over time, the current TAZ definitions were applied to the 2007 and 2014 employer databases. This technique was not applied to the 1995 and 2000 employer databases since those databases did not include the establishment coordinates. Instead, the RAZ and TAZ, defined as of the time of creation of these files, were assigned to each establishment. Thus, the current employment centers are not compared to those designated from the 1995 and 2000 files. In order to compare to this earlier work, employment by RAZ over time is examined in the last section of this report.

In the academic literature, various techniques for identifying employment centers have been proposed. The identification of employment centers for this report follows a simple methodology. An early work<sup>3</sup> indicated that employment density and the employment-to-population ratio are the best measures to identify employment centers. Thresholds of total employment of at least 10,000, employment density of at least 6,400, and employment per 1,000

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<sup>1</sup> Tom Rex, “Midtown, Downtown Form Metro Phoenix Employment Core,” *Arizona Business* 47(10):1-5 (October 2000) and “Much of Metro Phoenix Employment Core Is in East Valley,” *Arizona Business* 49(11):7-11 (November 2002).

<sup>2</sup> An establishment is a physical location at which individuals work. A company may have multiple establishments.

<sup>3</sup> John F. McDonald, “The Identification of Urban Employment Subcenters,” *Journal of Urban Economics* 21(2):242-258 (March 1987).

residents in excess of the metropolitan average were selected as criteria in defining employment centers. Using MAG's 2021 employment data and population estimates for 2020, employment per 1,000 residents in Maricopa County was 410. These thresholds are applied to an entire employment center, not to each of the contiguous TAZs that comprise an employment center. In some centers, lower-density TAZs are included to create a contiguous area that is somewhat regular in shape.

Overall, MAG's employment count for Maricopa County in 2021 was 88.6 percent of the annual average reported by the U.S. Bureau of Labor Statistics in its Quarterly Census of Employment and Wages (QCEW). For Pinal County, MAG's count was 98.6 percent of the QCEW total. In part, MAG's lower totals result from the omission of establishments of fewer than five employees. Nationally, such establishments accounted for 5.4 percent of total employment.<sup>4</sup>

Since MAG excludes establishments with fewer than five employees and since its employment total in 2021 is less than that reported by the federal government for Maricopa County, the thresholds noted above have been scaled down to total employment of at least 8,875 and employment density of at least 5,675. Employment from the 2000 Employer Database was further below the federal figures — the criteria used at that time were total employment of 7,250 and employment per square mile of 4,650. To be considered an employment center in 2021, total employment must be at least 8,875 and the employment density must be at least 4,650. An employment center with an employment density of less than 5,675 is considered to be marginal.

In the Phoenix area, an extensive contiguous area stretching from Tempe into central Phoenix meets the criteria. This large employment-dense area is subdivided into multiple employment centers, based on commonly identifiable areas if possible.

With RAZs larger in area and generally including extensive residential neighborhoods, a lower employment density criterion is employed. For this report, a RAZ with total employment of at least 12,500, an employment density of at least 2,000, and employment per 1,000 residents of more than 410 are highlighted.

For this report, RAZs have been named as portions of cities, such as South Tempe, or geographical landmarks, such as Sky Harbor Airport. Employment centers are named mostly as streets or intersections within the center, or alternatively with a title such as "downtown."

MAG assigned an industry code using the North American Industry Classification System (NAICS) to each establishment. This code, however, may be different from that assigned by the federal government. Indeed, even at the broad sectoral level, the sum of the number of employees reported by MAG is considerably different from that reported by the QCEW in many of the 20 sectors (see Table 1). For example, MAG's employment total for Maricopa County was less than 70 percent of the QCEW total in the transportation and warehousing and administrative support sectors, but MAG's total was more than 30 percent greater than the QCEW total in the mining; management of companies; arts, entertainment, and recreation; and other services sectors. The correlation is zero between MAG's employment as a share of the QCEW employment and the percentage of employment at establishments of fewer than five employees.

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<sup>4</sup> This is based on *County Business Patterns* for 2019, which is produced by the U.S. Census Bureau.

While the sectoral mix of each employment center is examined in this report, readers are advised to remember that the reported mix may be considerably different from the mix that would be calculated from the federal data.<sup>5</sup>

**TABLE 1  
EMPLOYMENT BY SECTOR IN MARICOPA COUNTY IN 2021**

	<b>MAG Employer Database</b>	<b>QCEW*</b>	<b>MAG as a Share of QCEW</b>
TOTAL	1,846,290	2,083,731	88.6%
Agriculture, Forestry, Fishing, and Hunting	5,257	5,995	87.7
Mining, Quarrying, and Oil and Gas Extraction	2,348	1,709	137.4
Utilities	12,982	15,734	82.5
Construction	99,839	137,243	72.7
Manufacturing	147,263	133,285	110.5
Wholesale Trade	65,758	79,221	83.0
Retail Trade	228,276	232,473	98.2
Transportation and Warehousing	62,804	108,704	57.8
Information	40,888	38,165	107.1
Finance and Insurance	122,042	152,552	80.0
Real Estate and Rental and Leasing	44,483	43,981	101.1
Professional, Scientific, and Technical Services	112,675	131,637	85.6
Management of Companies and Enterprises	41,601	30,861	134.8
Administrative Support and Waste Management	95,605	191,758	49.9
Educational Services	132,374	127,830	103.6
Health Care and Social Assistance	236,156	293,732	80.4
Arts, Entertainment, and Recreation	38,970	29,187	133.5
Accommodation and Food Services	191,441	176,387	108.5
Other Services	76,016	53,797	141.3
Public Administration	89,512	98,056	91.3

\* Unclassified employment totals 1,424.

Source: Calculated from the 2021 Employer Database of the Maricopa Association of Governments and the Quarterly Census of Employment and Wages (QCEW) of the U.S. Department of Labor, Bureau of Labor Statistics.

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<sup>5</sup> While the federal government assigns a NAICS industry to each establishment, the federal government's strict disclosure regulations preclude comparing the federal NAICS assignments to those of MAG.

## EMPLOYMENT CENTERS

In Maricopa County, 28 employment centers were identified based on 2021 employment data, six of which had a density less than 5,675 (see Table 2). No employment centers were present in Pinal County.

Ten of the employment centers form a contiguous area, stretching west from northwest Tempe to west of downtown Phoenix, then north along Central Avenue and east along Camelback Road (see Map 1). Employment per square mile exceeded 5,675 in each of these 10 centers except Sky Harbor Airport, which has much of its land area dedicated to the airport's runways.

South and east of northwest Tempe, several more centers are nearly contiguous, extending east into downtown Mesa, and southeast into Chandler. Only one of these employment centers — Main Street - Mesa — had an employment density of less than 5,675. In addition to this large, nearly contiguous area, 12 outlying employment centers are located in Phoenix, Scottsdale, Mesa, and Chandler. Four of these 12 outlying centers had an employment density of less than 5,675.

Employment centers in Metro Phoenix are disproportionately located southeast of downtown Phoenix, extending to east of the alignment of 88th Street. The most westerly edge of the 43rd Avenue and Buckeye Road center is 59th Avenue, but otherwise no center extends west of 35th Avenue.

The 28 employment centers range in size from about three-fourths of a square mile to around 5 square miles, with an average of 2.94 square miles. Combined, the 28 centers cover just 0.9 percent of Maricopa County's land area, but accounted for 37.2 percent of the county's employment in 2021. Average employment per center was 24,506 and the average density was 8,326 workers per square mile. Each center had employment per 1,000 residents more than double the 410 criterion.

Average employment per establishment in Maricopa County in 2021 was 22.3. The average was 38.2 for the sum of the 28 centers, 24 of which had a figure greater than the county average. Employment per establishment exceeded 85 in four centers.

The sectoral mix of the 28 centers combined is compared to the county's mix in Chart 1. In the aggregation of the centers, manufacturing and various services — finance and insurance; professional, scientific, and technical services; management of companies, and administrative support — are more prevalent than in the county, but the employment shares are lower in the centers in retail trade and some service sectors: educational services; health care and social assistance; arts, entertainment, and recreation; accommodation and food services; and other services. In general, the average wage is higher in the sectors that are more common in the employment centers.

Based on the employer databases, employment in Maricopa County was just 0.2 percent higher in 2014 than in 2007, the result of the deep recession from 2008 into 2010. Between 2014 and 2021, the county's employment rose 27 percent. The sum of the 28 employment centers

**TABLE 2  
EMPLOYMENT CENTERS IN METROPOLITAN PHOENIX, LISTED BY EMPLOYMENT DENSITY IN 2021**

Center	Square Miles	2021 Employment		Percent Change in Employment		
		Number	Density	2007-14	2014-21	2007-21
Downtown Phoenix	1.33	39,229	29,533	-2%	15%	13%
Downtown Tempe	1.19	29,541	24,833	-6	70	60
Midtown Phoenix	2.26	48,499	21,414	-3	30	26
State Capitol	0.72	12,501	17,398	-27	8	-21
Papago Freeway - Phoenix	0.77	11,177	14,570	24	-3	21
Downtown Scottsdale	1.88	25,426	13,534	2	12	14
University Drive & Hohokam Freeway	4.46	42,161	9,444	2	-8	-6
Hayden & Greenway Roads	4.20	39,599	9,423	2	22	25
Red Mountain Freeway- Phoenix-Tempe	1.51	14,130	9,384	-2	20	17
Broadway Road & 40th Street	3.64	32,751	8,994	-3	21	17
East Washington Street	2.79	24,707	8,843	-6	12	6
Elliot Road & Priest Drive	3.09	26,333	8,511	9	5	15
East Camelback Road	4.29	34,673	8,078	-5	20	14
I-17 Freeway & Peoria Avenue	3.07	24,110	7,860	-8	-2	-9
I-17 Freeway North of 101 Freeway	4.80	34,860	7,262	30	24	61
Price Road - Chandler	4.96	36,012	7,257	79	40	151
Glendale Avenue & 16th Street	1.11	7,891	7,082	-14	42	22
McClintock & University Drives	2.08	13,614	6,538	-1	37	35
Superstition Freeway - West Mesa	3.19	20,231	6,348	-7	13	5
West Chandler Boulevard - Chandler	4.70	29,769	6,332	10	4	14
Grand Avenue & Thomas Road	2.02	12,269	6,072	-27	11	-19
Superstition Freeway & Power Road	2.47	14,447	5,853	28	22	56
I-17 Freeway South of 101 Freeway	3.58	20,027	5,588	-7	65	53
Arizona Avenue & Elliot Road	2.04	10,965	5,385	50	15	72
Buckeye Road & 24th Street	4.92	25,812	5,241	-20	17	-6
Main Street - Mesa	2.12	10,805	5,108	-23	26	-3
Scottsdale & Bell Roads	5.20	25,994	4,997	68	33	124
Buckeye Road & 43rd Avenue	4.00	18,642	4,656	13	39	58
SUM OF 28 CENTERS	82.41	686,175	8,326	2	19	22
MARICOPA COUNTY	9,224.27	1,846,290	200	0	27	27

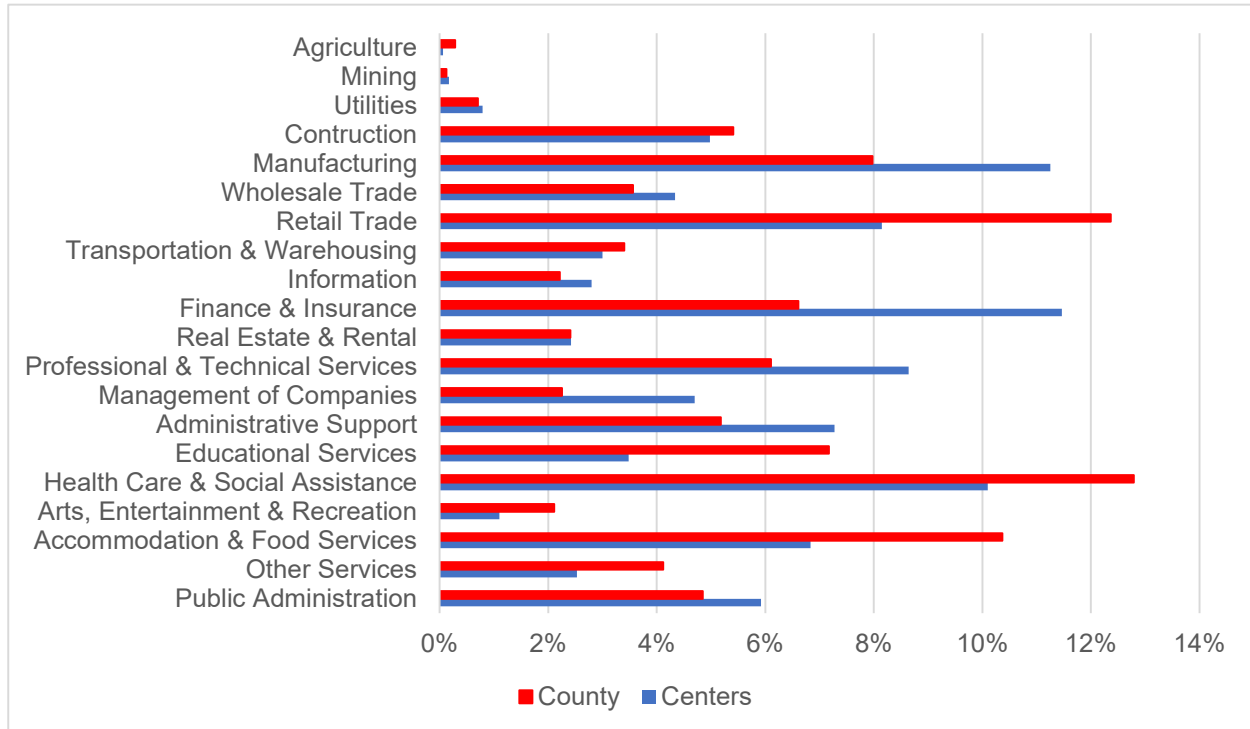
Source: Calculated from the 2021 Employer Database of the Maricopa Association of Governments.



**MAP 1**  
**EMPLOYMENT CENTERS IN METROPOLITAN PHOENIX IN 2021**

Source: Calculated from the 2021 Employer Database of the Maricopa Association of Governments.

**CHART 1  
EMPLOYMENT SHARE BY SECTOR IN MARICOPA COUNTY  
AND IN THE SUM OF THE EMPLOYMENT CENTERS IN 2021**



Source: Calculated from the 2021 Employer Database of the Maricopa Association of Governments.

experienced an increase in employment of 2.4 percent between 2007 and 2014 but the employment gain in the centers of 19 percent between 2014 and 2021 was less than the county’s 27 percent.

Each of the six centers with an employment density of more than 10,000 in 2021 are long established, located in the core area of Metro Phoenix, and experienced average or below-average employment growth: downtown Phoenix, the area along the Papago Freeway in central Phoenix, midtown Phoenix, the area around the state capital, downtown Tempe, and downtown Scottsdale.

In contrast, of the eight employment centers with employment growth of more than 50 percent between 2007 and 2021, seven are located well away from the Metro Phoenix core: two in Chandler, one in Mesa, one in north Scottsdale, two along the I-17 Freeway in north Phoenix, and one along the I-10 Freeway in west Phoenix. The exception is downtown Tempe, the only employment center with a density of more than 10,000 and employment growth between 2007 and 2021 of more than 50 percent. In general, employment growth rates are highest well away from the metro core but within the fringe of the urbanized area. However, most of these fast-growth areas did not have enough employment or employment density in 2021 to meet the criteria of an employment center.

A description of each of the employment centers follows, starting with Downtown Phoenix and continuing to the southeast. Then, employment centers west, north, and northeast of Downtown Phoenix are examined. The stated distances from one center to another is based on the nearest points of the two centers. If not specified otherwise, ranks are expressed with first being highest. The sectoral profile is based on MAG's assignment of the NAICS code and may differ from the sectoral mix that would be described from federal NAICS assignments.

### **Downtown Phoenix**

Ranked 24th in areal size, the Downtown Phoenix employment center in 2021 had the fourth-most employment and the highest employment density of the 28 centers. As defined by TAZs, the boundaries of the Downtown Phoenix center follow:

- North: Roosevelt Street. The Papago Freeway center is adjacent.
- South: mostly the Union Pacific railroad tracks.
- West: mostly Seventh Avenue. The State Capitol center is adjacent.
- East: Seventh Street. The East Washington Street center is adjacent.

Employment per establishment in the Downtown Phoenix center in 2021 ranked seventh. The sectoral mix was the sixth-most different from the county's mix. The public administration sector's share was far above the county's norm, with a well above-average share in the management of companies and professional, scientific, and technical services sectors. The share was considerably below average in the health care and social assistance and retail trade sectors, and well below average in the construction and manufacturing sectors. The Downtown Phoenix center had one of the highest shares among the 28 centers in the mining; information; real estate and rental; management of companies; educational services; arts, entertainment, and recreation; and public administration sectors. It had one of the lowest shares in the construction, manufacturing, administrative support, and health care and social assistance sectors.

Major employers in the Downtown Phoenix center in 2021 included Maricopa County (employment of nearly 5,800), the City of Phoenix (more than 3,600), Quicken Loans (2,400), Arizona State University (more than 1,600), Wells Fargo (more than 1,500), Pinnacle West Capital (Arizona Public Service, more than 1,200), and Chase Bank (more than 1,000). Five other employers had a workforce of between 500 and 999.

As a long-established center, the growth rate of employment in Downtown Phoenix was less than the median of the 28 centers, ranking 15th between 2007 and 2014 and 17th between 2014 and 2021.

### **East Washington Street**

Ranked 15th in areal size, the East Washington Street employment center in 2021 had the 15th-most employment and the 11th-highest employment density of the 28 centers. As defined by TAZs, the boundaries of the East Washington Street center follow:

- North: mostly Van Buren Street.
- South: mostly the Union Pacific railroad tracks. The Buckeye & 24th Street center is adjacent.
- West: Seventh Street. The Downtown Phoenix center is adjacent.
- East: 48th Street. The Red Mountain Freeway center is adjacent.

Employment per establishment in the East Washington Street center in 2021 ranked eighth among the 28 centers. The sectoral mix was sixth closest to the county's mix. The share was well above the county's norm in the health care and social assistance, manufacturing, and public administration sectors. The share was well below average in the retail trade and accommodation and food services sectors. The East Washington Street center had one of the lowest shares among the 28 centers in the administrative support sector.

Major employers in the East Washington Street center in 2021 included Valleywise Health (approximately 4,500 employees), Honeywell (more than 3,300), and the State of Arizona (more than 2,100). Two employers had a workforce of between 500 and 999.

As a long-established center, the growth rate of employment in the East Washington Street center was less than the median of the 28 centers, ranking 20th between both 2007 and 2014 and 2014 and 2021.

### **Buckeye Road & 24th Street**

Ranked third in areal size, the Buckeye Road & 24th Street employment center in 2021 had the 13th-most employment and the fourth-lowest employment density of the 28 centers — less than 5,675. The employment density is adversely affected by the large amount of land dedicated to the airport's runways. As defined by TAZs, the boundaries of the Buckeye Road & 24th Street center follow:

- North: mostly the Union Pacific railroad tracks. The East Washington Street center is adjacent.
- South: mostly the Salt River. The Broadway Road and 40th Street center is adjacent.
- West: 16th Street or 20th Street.
- East: 44th Street.

Employment per establishment in the Buckeye Road & 24th Street employment center in 2021 ranked fourth among the 28 centers. The sectoral mix was eighth-most different from the county's mix. The share was considerably above the county's norm in the transportation and warehousing and administrative support sectors and also well above average in the management of companies sector. The share was well below average in the health care and social assistance, retail trade, accommodation and food services, and educational services sectors. The Buckeye Road & 24th Street center had the highest share among the 28 centers in the transportation and warehousing and administrative support sectors. It had one of the lowest shares in the information, real estate and rental, educational services, health care and social assistance, and arts, entertainment, and recreation sectors.

Major employers in the Buckeye Road & 24th Street center in 2021 included the Bank of America (employment of more than 3,400), Chase Bank (more than 2,300), American Airlines (more than 2,200), and The Money Source (1,200). Five employers had a workforce of between 500 and 999.

As a long-established center, the growth rate of employment in the Buckeye Road & 24th Street center was less than the median of the 28 centers, ranking 25th between 2007 and 2014 and 16th between 2014 and 2021. Employment in 2021 was less than in 2007.

### **Broadway Road & 40th Street**

Ranked 10th in areal size, the Broadway Road & 40th Street employment center in 2021 had the eighth-most employment and the 10th-highest employment density of the 28 centers. As defined by TAZs, the boundaries of the center follow:

- North: mostly the Salt River. The Buckeye & 24th Street center is adjacent.
- South: Broadway Road or Roeser Road.
- West: 24th Street or 32nd Street.
- East: 48th Street. The University Drive & Hohokam Freeway center is adjacent.

Employment per establishment in the Broadway Road & 40th Street center in 2021 ranked 14th among the 28 centers. The sectoral mix was 16th-most different from the county's mix. The share was well above the county's norm in the professional, scientific, and technical services; finance and insurance; construction; and wholesale trade sectors. The share was well below average in the retail trade, health care and social assistance, accommodation and food services, and educational services sectors. The Broadway Road & 40th Street center had one of the highest shares among the 28 centers in the construction; wholesale trade; and professional, scientific, and technical services sectors. It had one of the lowest shares in the arts, entertainment, and recreation sector.

Major employers in the Broadway Road & 40th Street center in 2021 included the Aetna Medicaid Business Unit (employment of nearly 1,700), Apollo Education Group (the University of Phoenix, 1,800), United Healthcare (more than 1,200), and Asurion (1,000). Five employers had a workforce of between 500 and 999.

Among the 28 centers, the growth rate of employment in the Broadway Road & 40th Street center ranked 16th between 2007 and 2014 and 13th between 2014 and 2021.

### **Red Mountain Freeway - Phoenix-Tempe**

Ranked 23rd in areal size, the Red Mountain Freeway employment center in 2021 had the 21st-most employment and the ninth-highest employment density of the 28 centers. As defined by TAZs, the boundaries of the Red Mountain Freeway center follow:

- North: mostly McKellips Road alignment. The Downtown Scottsdale center is more than three miles away.
- South: varies, but near the freeway. One-fourth mile separates Red Mountain Freeway center from the University Drive & Hohokam Freeway center.
- West: mostly 48th Street. The East Washington Street center is adjacent.
- East: approximately the 64th Street alignment.

Employment per establishment in the Red Mountain Freeway center in 2021 was the second highest among the 28 centers. The difference in the sectoral mix from the county's mix was seventh greatest. The share was considerably above the county's norm in the utilities, management of companies, and transportation and warehousing sectors. The share was well

below average in the retail trade, accommodation and food services, and educational services sectors. The Red Mountain Freeway center had the highest share among the 28 centers in the utilities sector and one of the highest shares in the transportation and warehousing, information, and management of companies sectors. It had one of the lowest shares in the wholesale trade, retail trade, accommodation and food services, and other services sectors.

Major employers in the Red Mountain Freeway center in 2021 included the Salt River Project (more than 2,100 employees), Laboratory Sciences of Arizona (nearly 1,200), MUFG Bank (nearly 1,200), the U.S. Postal Service (more than 1,100), and Wells Fargo (more than 1,100). Three employers had a workforce of between 500 and 999.

Among the 28 centers, the growth rate of employment in the Red Mountain Freeway center ranked 14th between 2007 and 2014 and 15th between 2014 and 2021.

### **University Drive & Hohokam Freeway**

Ranked sixth in areal size, the University Drive & Hohokam Freeway employment center in 2021 had the second-most employment and the seventh-highest employment density of the 28 centers. As defined by TAZs, the boundaries of the University Drive & Hohokam Freeway center follow:

- North: the Salt River. The Red Mountain Freeway center is within one-fourth mile.
- South: mostly Southern Avenue, but extends to Baseline Road. The Elliot Road & Priest Drive center is one mile away.
- West: 48th Street. The Broadway Road & 40th Street center is adjacent.
- East: mostly 56th Street, but extends to near Mill Avenue. The Downtown Tempe center is within one-half mile.

Employment per establishment in the University Drive & Hohokam Freeway center in 2021 ranked 16th among the 28 centers. The sectoral mix was 10th closest to the county's mix. The share was substantially above the county's norm in the manufacturing and administrative support sectors. The share was well below average in the health care and social assistance and accommodation and food services sectors. The University Drive & Hohokam Freeway center had one of the highest shares among the 28 centers in the administrative support sector.

Major employers in the University Drive & Hohokam Freeway center in 2021 included ABM Industries (employment of 2,000), the Maricopa County Community College District (more than 1,300), Wells Fargo (more than 1,300), and Amazon (more than 1,000). Nine employers had a workforce of between 500 and 999.

The growth rate of employment in the University Drive & Hohokam Freeway center was 11th highest of the 28 centers between 2007 and 2014 but it was the lowest between 2014 and 2021. Employment in 2021 was less than in 2007.

### **Elliot Road & Priest Drive**

Ranked 13th in areal size, the Elliot Road & Priest Drive employment center in 2021 had the 11th-most employment and the 12th-highest employment density of the 28 centers. As defined by TAZs, the boundaries of the Elliot Road & Priest Drive center follow:

- North: Guadalupe Road to the Western Canal. The University Drive & Hohokam Freeway center is one mile away.
- South: Warner Road to Ray Road. The West Chandler Boulevard center is within one-half mile.
- West: mostly I-10 Freeway. One TAZ in Phoenix extends to 48th Street.
- East: Kyrene Road.

Employment per establishment in the Elliot Road & Priest Drive center in 2021 ranked ninth among the 28 centers. The sectoral mix was eighth closest to the county's mix. The share was well above the county's norm in the wholesale trade and manufacturing sectors. The share was well below average in the health care and social assistance and accommodation and food services sectors. The Elliot Road & Priest Drive center had one of the highest shares among the 28 centers in the wholesale trade, retail trade, and educational services sectors.

Major employers in the Elliot Road & Priest Drive center in 2021 included the Kyrene School District (employment of more than 1,900), Honeywell (more than 1,300), Insight (more than 1,100), Cenlar (Central Loan Administration & Reporting, more than 1,000), and Consumer Cellular (nearly 1,100). Three employers had a workforce of between 500 and 999.

The growth rate of employment in the Elliot Road & Priest Drive center was ninth highest of the 28 centers between 2007 and 2014 but it ranked only 24th between 2014 and 2021.

### **Downtown Tempe**

Ranked 25th in areal size, the Downtown Tempe employment center in 2021 had the 10th-most employment and the second-highest employment density of the 28 centers. As defined by TAZs, the boundaries of the Downtown Tempe center follow:

- North: mostly the Salt River.
- South: University Drive or Apache Boulevard.
- West: mostly west of Mill Avenue. The University Drive & Hohokam Freeway center is one-half mile away.
- East: Rural Road. The McClintock & University Drives center is one mile away.

Employment per establishment in the Downtown Tempe center in 2021 was the highest of the 28 centers. The sectoral mix was fourth-most different from the county's mix. The share was far above the county's norm in the finance and insurance and educational services sectors. The share was substantially below average in the health care and social assistance sector and well below average in the retail trade, manufacturing, and construction sectors. The Downtown Tempe center had one of the highest shares among the 28 centers in the finance and insurance and educational services sectors. It had the lowest share in the construction, wholesale trade, and healthcare and social assistance sectors, and one of the lowest in the transportation and warehousing and other services sectors.

The two major employers in the Downtown Tempe center in 2021 were Arizona State University (employment of more than 8,300) and State Farm Insurance (more than 7,500). Chase Bank employed more than 1,300 and ADP employed more than 1,100. Five employers had a workforce of between 500 and 999.

The growth rate of employment in the Downtown Tempe center was 19th highest of the 28 centers between 2007 and 2014. However, it had the highest rate of employment growth between 2014 and 2021. Its 60 percent growth rate between 2007 and 2021 was the fifth highest among the centers.

### **McClintock & University Drives**

Ranked 19th in areal size, the McClintock & University Drives employment center in 2021 had the 22nd-most employment and the 18th-highest employment density of the 28 centers. As defined by TAZs, the boundaries of the McClintock & University Drives center follow:

- North: the Salt River. The Downtown Scottsdale center is more than three miles away.
- South: Broadway Road.
- West: McClintock Drive. The Downtown Tempe employment center is one mile away.
- East: Price Road. The Main Street - Mesa center is one-fourth mile away.

Employment per establishment in the McClintock & University Drives center in 2021 ranked 22nd among the 28 centers. The sectoral mix was fifth closest to the county's mix. The share was well above the county's norm in the manufacturing sector. The share was well below average in the health care and social assistance and educational services sectors. The McClintock & University Drives center had one of the highest shares among the 28 centers in the real estate and rental and other services sectors.

Freedom Financial was the major employer in the McClintock & University Drives center in 2021, with employment of nearly 1,500. Two employers had a workforce of between 500 and 999.

The growth rate of employment in the McClintock & University Drives center was 13th highest of the 28 centers between 2007 and 2014 and sixth highest between 2014 and 2021.

### **Main Street - Mesa**

Ranked 18th in areal size, the Main Street - Mesa employment center in 2021 had the second-least employment and the third-lowest employment density of the 28 centers — less than 5,675. As defined by TAZs, the boundaries of the Main Street - Mesa center follow:

- North: Main Street or University Drive.
- South: mostly Broadway Road. The Superstition Freeway - West Mesa center is one mile away.
- West: the city limits. The McClintock & University Drives center is one-fourth mile away.
- East: Mesa Drive or Center Street.

Employment per establishment in the Main Street - Mesa center in 2021 was third lowest of the 28 centers. The sectoral mix was ninth closest to the county's mix. The share was well above the county's norm in the public administration, manufacturing, and wholesale trade sectors. The share was somewhat below average in most of the other sectors. The Main Street - Mesa center had one of the highest shares among the 28 centers in the other services and public administration sectors.



The City of Mesa was the major employer in the Main Street - Mesa center in 2021, with employment of more than 1,300. One employer had a workforce of between 500 and 999.

The growth rate of employment in the Main Street - Mesa center was third lowest of the 28 centers between 2007 and 2014 but was ninth highest between 2014 and 2021. Still, its employment in 2021 was less than in 2007.

### **Superstition Freeway - West Mesa**

Ranked 12th in areal size, the Superstition Freeway - West Mesa employment center in 2021 had the 17th-highest employment and 19th-highest employment density of the 28 centers. As defined by TAZs, the boundaries of the Superstition Freeway - West Mesa center follow:

- North: mostly Southern Avenue. The Main Street - Mesa center is one mile away.
- South: mostly Baseline Road. The Arizona Avenue & Elliot Road center is one mile distant.
- West: Alma School Road or the city limits.
- East: Mesa Drive or Stapley Drive. The Superstition Freeway & Power Road center is four miles distant.

Employment per establishment in the Superstition Freeway - West Mesa center in 2021 ranked 20th among the 28 centers. The difference in the sectoral mix from the county's mix was the least of the centers. The share was well above the county's norm in the health care and social assistance sector. The Superstition Freeway - West Mesa center had one of the highest shares among the 28 centers in the educational services, health care and social assistance, and arts, entertainment, and recreation sectors.

Banner Health was the major employer in the Superstition Freeway - West Mesa center in 2021, with employment of more than 3,300. Employment exceeded 1,000 at the Maricopa County Community College District. Four employers had a workforce of between 500 and 999.

The growth rate of employment in the Superstition Freeway - West Mesa center ranked 21st among the 28 centers between 2007 and 2014 and 19th between 2014 and 2021.

### **Superstition Freeway & Power Road**

Ranked 16th in areal size, the Superstition Freeway & Power Road employment center in 2021 had the 20th-highest employment and 22nd-highest employment density of the 28 centers. As defined by TAZs, the boundaries of the Superstition Freeway & Power Road center follow:

- North: Southern Avenue or Superstition Freeway.
- South: mostly Baseline Road.
- West: Recker Road or Greenfield Road. The Superstition Freeway - West Mesa center is four miles distant.
- East: Power Road or Sossaman Road.

Employment per establishment in the Superstition Freeway & Power Road center in 2021 ranked 21st among the 28 centers. The sectoral mix was 12th-most different from the county's mix. The share was considerably above the county's norm in the retail trade and health care and social

assistance sectors, and well above average in the accommodation and food services and administrative support sectors. The center's share was well below average in the manufacturing and educational services sectors. The Superstition Freeway & Power Road center had the highest share among the 28 centers in the retail trade sector and one of the highest shares in the health care and social assistance and accommodation and food services sectors. The share was among the lowest in the manufacturing, wholesale trade, transportation and warehousing, and professional, scientific, and technical services sectors.

Banner Health employed more than 1,800 and Drivetime Auto employed more than 1,300 in the Superstition Freeway & Power Road center in 2021. One employer had a workforce of between 500 and 999.

Given its location well away from the core of Metro Phoenix, the growth rate of employment in the Superstition Freeway & Power Road center was above average, ranking fifth among the 28 centers between 2007 and 2014 and 11th between 2014 and 2021.

#### **West Chandler Boulevard - Chandler**

Ranked fifth in areal size, the West Chandler Boulevard employment center in 2021 had the ninth-highest employment and 20th-highest employment density of the 28 centers. As defined by TAZs, the boundaries of the West Chandler Boulevard center follow:

- North: mostly the city limits. The Elliot Road & Priest Drive center is within one-half mile.
- South: Pecos Road to Chandler Boulevard.
- West: I-10 Freeway or 48th Street. One TAZ west of the freeway in Phoenix is included.
- East: Price Road or McClintock Drive. The Price Road - Chandler center is adjacent.

Employment per establishment in the West Chandler Boulevard center in 2021 ranked 18th among the 28 centers. The sectoral mix was 15th-most different from the county's mix. The share was far above the county's norm in the manufacturing sector and well below average in the health care and social assistance and educational services sectors. The West Chandler Boulevard center had the highest share among the 28 centers in the manufacturing sector and one of the lowest shares in the real estate and rental and educational services sectors.

Intel was the primary employer in the West Chandler Boulevard center in 2021 with more than 6,100 workers. Honeywell had a workforce of between 500 and 999.

Among the 28 centers, the growth rate of employment in the West Chandler Boulevard center ranked eighth between 2007 and 2014 but only 25th between 2014 and 2021.

#### **Price Road - Chandler**

As the second largest in areal size of the 28 centers, the Price Road employment center in 2021 ranked fifth in employment but 16th in employment density. As defined by TAZs, the boundaries of the Price Road center follow:

- North: mostly Chandler Boulevard.
- South: Chandler Heights Road.

- West: west of Price Road. The West Chandler Boulevard center is adjacent at the north end.
- East: mostly Dobson Road.

Employment per establishment in the Price Road center in 2021 was third highest of the 28 centers. The sectoral mix was fifth-most different from the county's mix. The share was substantially above the county's norm in the manufacturing, finance and insurance, and management of companies sectors and well below average in the retail trade, accommodation and food services, and educational services sectors. The Price Road center had one of the highest shares among the 28 centers in the manufacturing, finance and insurance, and management of companies sectors and one of the lowest shares in the accommodation and food services, other services, and public administration sectors.

Intel was the largest employer in the Price Road center in 2021 with about 5,700 workers, followed by Wells Fargo (more than 5,400), Bank of America (more than 2,800), Dignity Health (more than 2,600), Northrup Grumman (1,900), Microchip Technology (more than 1,400), and PayPal (more than 1,200). Seven employers had a workforce of between 500 and 999.

The growth rate of employment in the Price Road center was among the highest of the 28 centers, ranking first between 2007 and 2014 and fourth between 2014 and 2021. Its 151 percent growth rate between 2007 and 2021 was the highest among the centers.

#### **Arizona Avenue & Elliot Road**

Ranked 20th in areal size, the Arizona Avenue & Elliot Road employment center in 2021 had the third-lowest employment and fifth-lowest employment density of the 28 centers. As defined by TAZs, the boundaries of the Arizona Avenue & Elliot Road center follow:

- North: Guadalupe Road. The Superstition Freeway - West Mesa center is one mile distant.
- South: Warner Road.
- West: Country Club Drive.
- East: McQueen Road.

Employment per establishment in the Arizona Avenue & Elliot Road center in 2021 ranked 19th among the 28 centers. The sectoral mix was 10th-most different from the county's mix. The share was substantially above the county's norm in the manufacturing and professional, scientific, and technical services sectors, and also above average in the construction and wholesale trade sectors. The share was well below average in the health care and social assistance, accommodation and food services, and finance and insurance sectors. The Arizona Avenue & Elliot Road center had the highest share among the 28 centers in the construction and professional, scientific, and technical services sectors and one of the highest shares in the manufacturing sector. The share was among the lowest in the information, finance and insurance, and real estate and rental sectors.

In the Arizona Avenue & Elliot Road center, GoDaddy employed more than 1,100 and Northrup Grumman employed more than 1,000 in 2021. No other employer had a workforce of more than 500.

Among the 28 employment centers, the growth rate of employment in the Arizona Avenue & Elliot Road center ranked third between 2007 and 2014 but only 18th between 2014 and 2021. Still, its 72 percent growth rate was the third highest among the centers between 2007 and 2021.

### **State Capitol**

As the smallest in area of the 28 employment centers, the State Capitol employment center in 2021 had the sixth-lowest employment but the fourth-highest employment density. As defined by TAZs, the boundaries of the State Capitol center follow:

- North: Van Buren Street.
- South: Union Pacific Railroad tracks.
- West: 19th Avenue.
- East: Seventh Avenue. The Downtown Phoenix center is adjacent.

Employment per establishment in the State Capitol center in 2021 ranked fifth among the 28 centers. The sectoral mix was the most different from the county's mix. The share was far above the county's norm in the public administration sector, and also well above average in the utilities sector. The share was below average in every other sector. The State Capitol center had the highest share among the 28 centers in the public administration sector and ranked second in the utilities sector. The share was among the lowest in 11 sectors.

The State of Arizona was the dominant employer in the State Capitol center in 2021; its employment of more than 9,400 accounted for three-fourths of the center's employment. The Salt River Project employed about 750.

Among the 28 employment centers, the growth rate of employment in the State Capitol center ranked last between 2007 and 2014 and 23rd between 2014 and 2021. Employment decreased 21 percent between 2007 and 2021, the largest decline of any center.

### **Papago Freeway - Phoenix**

As the second smallest in area of the 28 employment centers, the Papago Freeway employment center in 2021 had the fourth-lowest employment but the fifth-highest employment density. As defined by TAZs, the boundaries of the Papago Freeway center follow:

- North: McDowell Road. The Midtown Phoenix center is adjacent.
- South: Roosevelt Street. The Downtown Phoenix center is adjacent.
- West: Seventh Avenue.
- East: Seventh Street or 16th Street.

Employment per establishment in the Papago Freeway center in 2021 ranked 11th among the 28 centers. The sectoral mix was the second-most different from the county's mix. The share was far above the county's norm in the health care and social assistance and management of companies sectors. The share was below average in every other sector. The Papago Freeway center had the highest share among the 28 centers in the health care and social assistance and management of companies sectors. The share was among the lowest in several sectors.

Banner Health, with a workforce of 7,800, was the dominant employer in the Papago Freeway center in 2021, accounting for approximately 70 percent of the center's employment.

Among the 28 employment centers, the growth rate of employment in the Papago Freeway center ranked sixth between 2007 and 2014 but was second lowest between 2014 and 2021.

### **Midtown Phoenix**

Ranked 17th in areal size, the Midtown Phoenix employment center in 2021 had the most employment and the third-highest employment density among the 28 centers. As defined by TAZs, the boundaries of the Midtown Phoenix center follow:

- North: Indian School Road or the Grand Canal. The East Camelback Road center is adjacent.
- South: McDowell Road. The Papago Freeway center is adjacent.
- West: Seventh Avenue or Third Avenue.
- East: Seventh Street.

Employment per establishment in the Midtown Phoenix center in 2021 ranked 15th among the 28 centers. The sectoral mix was ninth-most different from the county's mix. The share was well above the county's norm in the health care and social assistance; management of companies; professional, scientific, and technical services; and public administration sectors. The share was well below average in the retail trade, accommodation and food services, educational services, and manufacturing sectors. The Midtown Phoenix center had one of the highest shares among the 28 centers in the health care and social assistance and public administration sectors. The share was the lowest in the retail trade sector.

In the Midtown Phoenix center, the major employers in 2021 were Dignity Health (a workforce of more than 4,700), U Haul (more than 4,500), the Veterans Administration Medical Center (3,500), Banner Health (2,350), St. Joseph's Hospital (more than 1,400), the U.S. Department of Veterans Affairs (more than 1,300), and Allied Universal (1,000). Three employers had a workforce of between 500 and 999.

Among the 28 employment centers, the growth rate of employment in the Midtown Phoenix center ranked 17th between 2007 and 2014 and eighth between 2014 and 2021.

### **East Camelback Road**

Ranked seventh in areal size, the East Camelback Road employment center in 2021 had the seventh-most employment and the 13th-highest employment density among the 28 centers. As defined by TAZs, the boundaries of the East Camelback Road center follow:

- North: mostly Missouri Avenue. The Glendale Avenue & 16th Street center is 1.5 miles away.
- South: Campbell Avenue. The Midtown Phoenix center is adjacent.
- West: Central Avenue.
- East: 32nd Street to 40th Street. The Downtown Scottsdale center is more than three miles away.

Employment per establishment in the East Camelback Road center in 2021 ranked fourth lowest among the centers. The difference in the sectoral mix from the county's mix was second lowest. The share was well above the county's norm in the real estate and rental and professional, scientific, and technical services sectors. The East Camelback Road center had one of the highest shares among the 28 centers in these two sectors.

Few large employers are located in East Camelback Road center. Two companies employed between 500 and 999 in 2021.

Among the 28 employment centers, the growth rate of employment in the East Camelback Road center ranked 18th between 2007 and 2014 and 14th between 2014 and 2021.

### **Glendale Avenue & 16th Street**

As the third smallest in area among the 28 employment centers, the Glendale Avenue & 16th Street employment center in 2021 had the least employment and the 17th-highest employment density. As defined by TAZs, the boundaries of Glendale Avenue & 16th Street center follow:

- North: Northern Avenue.
- South: Glendale Avenue. The East Camelback Road center is 1.5 miles away.
- West: 12th Street.
- East: the Piestewa Freeway.

Employment per establishment in the Glendale Avenue & 16th Street center in 2021 was sixth lowest among the 28 centers. The sectoral mix was 11th-most different from the county's mix. The share was considerably above the county's norm in the administrative support; professional, scientific, and technical services; and health care and social assistance sectors. The share was well below average in the retail trade, manufacturing, and educational services sectors. The Glendale Avenue & 16th Street center had one of the highest shares among the 28 centers in the administrative support; professional, scientific, and technical services; and other services sectors and one of the lowest shares in the manufacturing, wholesale trade, and public administration sectors.

Few large employers are located in the Glendale Avenue & 16th Street center. Two companies employed between 500 and 999 in 2021.

Among the 28 employment centers, the growth rate of employment in the Glendale Avenue & 16th Street center ranked 24th between 2007 and 2014 but was third highest between 2014 and 2021.

### **Buckeye Road & 43rd Avenue**

Ranked ninth in areal size, the Buckeye Road & 43rd Avenue employment center in 2021 ranked 19th in employment and last in employment density among the 28 centers. As defined by TAZs, the boundaries of the Buckeye Road & 43rd Avenue center follow:

- North: Van Buren Street.
- South: Buckeye Road to Lower Buckeye Road.
- West: 51st Avenue to 59th Avenue.

- East: 35th Avenue to 43rd Avenue. The Grand Avenue & Thomas Road center is one mile to the northeast.

Employment per establishment in the Buckeye Road & 43rd Avenue center in 2021 was sixth highest among the 28 centers. The sectoral mix was third-most different from the county's mix. The share was considerably above the county's norm in the manufacturing, retail trade, and wholesale trade sectors, and well above average in the transportation and warehousing sector. The share was well below average in all of the services sectors. The Buckeye Road & 43rd Avenue center had one of the highest shares among the 28 centers in the in the manufacturing, wholesale trade, retail trade, and transportation and warehousing sectors. It had one of the lowest shares in several sectors.

Amazon was the dominant employer in the Buckeye Road & 43rd Avenue center in 2021, employing nearly 3,800 workers. No other company employed more than 500.

Among the 28 employment centers, the growth rate of employment in the Buckeye Road & 43rd Avenue center ranked seventh between 2007 and 2014 and fifth between 2014 and 2021.

### **Grand Avenue & Thomas Road**

Ranked 21st in areal size, the Grand Avenue & Thomas Road employment center in 2021 ranked 24th in employment and 21st in employment density among the 28 centers. As defined by TAZs, the boundaries of the Grand Avenue & Thomas Road center follow:

- North: Indian School Road. The I-17 Freeway & Peoria Avenue employment center is four miles away.
- South: mostly I-10.
- West: mostly 35th Avenue. The Buckeye Road & 43rd Avenue center is one mile to the southwest.
- East: I-17 Freeway to 27th Avenue.

Employment per establishment in the Grand Avenue & Thomas Road center in 2021 ranked 24th among the 28 centers. The sectoral mix was 13th-most different from the county's mix. The share was far above the county's norm in the wholesale trade sector, and well above average in the administrative support, construction, and manufacturing sectors. The share was well below average in the health care and social assistance, accommodation and food services, and finance and insurance sectors. The Grand Avenue & Thomas Road center had one of the highest shares among the 28 centers in the in the wholesale trade and construction sectors. It had one of the lowest shares in the public administration sector.

Only two companies in the Grand Avenue & Thomas Road center employed more than 500 in 2021: Shamrock Foods (nearly 1,400) and United Parcel Service (approximately 1,100).

Among the 28 employment centers, the growth rate of employment in the Grand Avenue & Thomas Road center ranked 27th between 2007 and 2014 and 22nd between 2014 and 2021. Employment decreased 19 percent between 2007 and 2021, the second-largest decline of any center.

### **I-17 Freeway & Peoria Avenue**

Ranked 14th in areal size, the I-17 Freeway & Peoria Avenue employment center in 2021 had the 16th-highest employment and 14th-highest employment density of the 28 centers. As defined by TAZs, the boundaries of the I-17 Freeway & Peoria Avenue employment center follow:

- North: Cactus Road. The I-17 Freeway South of 101 Freeway center is two miles distant.
- South: Northern Avenue. The Grand Avenue & Thomas Road employment center is four miles away.
- West: I-17 Freeway to 31st Avenue.
- East: 19th Avenue.

Employment per establishment in the I-17 Freeway & Peoria Avenue center in 2021 ranked 17th among the 28 centers. The sectoral mix was seventh closest to the county's mix. The share was well above the county's norm in the finance and insurance; professional, scientific, and technical services; and utilities sectors. The share was well below average in the health care and social assistance, retail trade, and educational services sectors. The I-17 Freeway & Peoria Avenue employment center had one of the highest shares among the 28 centers in the utilities and accommodation and food services sectors.

Blue Cross Blue Shield employed about 2,000 in the I-17 Freeway & Peoria Avenue center and Pinnacle West Capital employed more than 1,400 in 2021. Six employers had a workforce of between 500 and 999.

The growth rate of employment in the I-17 Freeway & Peoria Avenue center was among the lowest of the 28 employment centers, ranking sixth lowest between 2007 and 2014 and third lowest between 2014 and 2021. Employment in 2021 was 9 percent less than in 2007, the third-largest decrease of any center.

### **I-17 Freeway South of the 101 Freeway**

Ranked 11th in areal size, the I-17 Freeway South of the 101 Freeway employment center in 2021 ranked 18th on employment and 23rd on employment density among the 28 centers. As defined by TAZs, the boundaries of the I-17 South of the 101 center follow:

- North: the 101 Freeway. The I-17 Freeway North of the 101 Freeway employment center is adjacent.
- South: Bell Road to Greenway Road. The I-17 Freeway & Peoria Avenue employment center is two miles distant.
- West: 31st Avenue to 35th Avenue.
- East: I-17 Freeway to 19th Avenue.

Employment per establishment in the I-17 South of the 101 center in 2021 ranked 10th among the 28 centers. The sectoral mix was 11th closest to the county's mix. The share was considerably above the county's norm in the administrative support sector and well above average in the information and management of companies sectors. The share was well below average in the educational services sector. The I-17 South of the 101 center had the highest share among the 28 centers in the information sector and one of the highest in the administrative support and transportation and warehousing sectors.



Honor Health was the largest employer in the I-17 South of the 101 center in 2021 with more than 2,100 workers. PetSmart (a workforce of more than 1,500), Waste Management (more than 1,200), and Knight-Swift Transportation (1,000) were other large employers. Four companies employed between 500 and 999.

Among the 28 employment centers, the growth rate of employment in the I-17 South of the 101 center ranked only 22nd between 2007 and 2014 but was second highest between 2014 and 2021.

### **I-17 Freeway North of the 101 Freeway**

Ranked fourth in areal size, the I-17 Freeway North of the 101 Freeway employment center in 2021 ranked sixth on employment and 15th on employment density among the 28 centers. As defined by TAZs, the boundaries of the I-17 North of the 101 center follow:

- North: Jomax Road.
- South: the 101 Freeway. The I-17 Freeway South of the 101 Freeway employment center is adjacent.
- West: mostly I-17 Freeway.
- East: mostly 19th Avenue.

The boundaries extend farther east and west near the 101 freeway.

Employment per establishment in the I-17 North of the 101 center in 2021 ranked 12th among the 28 centers. The sectoral mix was 14th-most different from the county's mix. The share was far above the county's norm in the finance and insurance sector and well above average in the construction sector. The share was well below average in the health care and social assistance and educational services sectors. The I-17 North of the 101 center had the highest share among the 28 centers in the finance and insurance sector and one of the highest in the construction sector.

USAA Insurance was the largest employer in the I-17 North of the 101 center in 2021 with nearly 4,000 workers. Other large employers were Discover Financial Services (more than 2,700 workers), Honeywell (more than 1,800), Wells Fargo (more than 1,700), Safeway (1,500), and Farmers Insurance (approximately 1,200). Five companies employed between 500 and 999.

Among the 28 employment centers, the growth rate of employment in the I-17 North of the 101 center ranked fourth between 2007 and 2014 and 10th between 2014 and 2021. Its 61 percent increase in employment between 2007 and 2021 was fourth highest among the centers.

### **Downtown Scottsdale**

Ranked 22nd in areal size, the Downtown Scottsdale employment center in 2021 ranked 14th on employment and sixth on employment density among the 28 centers. As defined by TAZs, the boundaries of the Downtown Scottsdale center follow:

- North: Chaparral Road. The Hayden & Greenway Roads center is more than six miles away.
- South: Osborn Road to Thomas Road. Various centers in the northern part of Tempe are more than three miles distant.
- West: mostly 68th Street. The East Camelback Road employment center is more than three miles away.

- East: mostly Miller Road.

Employment per establishment in the Downtown Scottsdale center in 2021 was the lowest of the 28 centers. The difference in the sectoral mix from the county's mix was third lowest. The share was well above the county's norm in the accommodation and food services; professional, scientific, and technical services; and health care and social assistance sectors. The share was well below average in the educational services and manufacturing sectors. The Downtown Scottsdale center had the highest share among the 28 centers in the accommodation and food services sector.

Honor Health was the largest employer in the Downtown Scottsdale center in 2021 with nearly 1,600 workers. Two employers had a workforce of between 500 and 999.

Among the 28 employment centers, the growth rate of employment in the Downtown Scottsdale center ranked 12th between 2007 and 2014 and 21st between 2014 and 2021.

### **Hayden & Greenway Roads**

Ranked eighth in areal size, the Hayden & Greenway Roads employment center in 2021 had the third-most employment and the eighth-highest employment density of the 28 centers. As defined by TAZs, the boundaries of the Hayden & Greenway Roads center follow:

- North: Frank Lloyd Wright Boulevard/Bell Road.
- South: Thunderbird Road. The Downtown Scottsdale center is more than six miles away.
- West: Scottsdale Road. The Scottsdale & Bell Roads center is adjacent.
- East: Thompson Peak Parkway.

Employment per establishment in the Hayden & Greenway Roads center in 2021 was the second lowest of the 28 centers. The sectoral mix was fourth closest to the county's mix. The share was well above the county's norm in the finance and insurance sector and well below average in the health care and social assistance and educational services sectors. The Hayden & Greenway Roads center had one of the highest shares among the 28 centers in the retail trade; information; arts, entertainment, and recreation; and other services sectors.

The major employer in the Hayden & Greenway Roads center in 2021 was Vanguard, with more than 2,700 workers. Four employers had a workforce of between 500 and 999.

The growth rate of employment in the Hayden & Greenway Roads center ranked 10th among the 28 centers between 2007 and 2014 and 12th between 2014 and 2021.

### **Scottsdale & Bell Roads**

The Scottsdale & Bell Roads employment center is the largest in area of the 28 centers. In 2021, it had the 12th-most employment but had the second-lowest employment density. As defined by TAZs, the boundaries of the Scottsdale & Bell Roads center follow:

- North: 101 Freeway to Deer Valley Road.
- South: Thunderbird Road to the Central Arizona Project Canal.
- West: 64th Street to Tatum Boulevard.
- East: Scottsdale Road. The Hayden & Greenway Roads center is adjacent.

Employment per establishment in the Scottsdale & Bell Roads center in 2021 ranked 13th among the 28 centers. The sectoral mix was 12th closest to the county's mix. The share was far above the county's norm in the finance and insurance sector and well above average in the health care and social assistance sector. The share was well below average in the educational services and manufacturing sectors. The Scottsdale & Bell Roads center had one of the highest shares among the 28 centers in the finance and insurance; real estate and rental; arts, entertainment, and recreation; and accommodation and food services sectors. It had one of the lowest shares in the construction, other services, and public administration sectors.

The major employers in the Scottsdale & Bell Roads center in 2021 were American Express, with more than 6,100 workers, and the Mayo Clinic, with more than 4,500 workers. One other employer had a workforce of between 500 and 999.

The growth rate of employment in the Scottsdale & Bell Roads center ranked second among the 28 centers between 2007 and 2014 and seventh between 2014 and 2021. Its 124 percent rise in employment between 2007 and 2021 was second highest among the centers.

## **EMPLOYMENT BY RAZ**

Twenty-four RAZs had an employment density of more than 2,000 and employment per 1,000 residents in excess of 410 in 2021 (see Table 3). Most of these RAZs form a large continuous area stretching north from southwest Chandler to north Scottsdale and west from north Tempe and south Scottsdale to 67th Avenue (see Map 2).

Twenty-two of these 24 RAZs include at least part of one of the 28 employment centers. Similarly, 23 of the 28 employment centers are included in one or more of the 24 RAZs. The exceptions are the I-17 Freeway South of the 101 Freeway, Scottsdale & Bell Roads, Grand Avenue & Thomas Road, Main Street - Mesa, and Arizona Avenue & Elliot Road employment centers.

Aggregating these 24 RAZs, employment in 2021 accounted for 49.8 percent of the Maricopa County total. The 258 square miles made up just 2.8 percent of the county total.

The four RAZs with the highest employment density did not change rank among the top 24 RAZs between 1995 and 2021. Some of the other 20 RAZs with 2021 employment density of more than 2,000 and employment per 1,000 residents in excess of 410 experienced a significant change in rank between 1995 and 2021. Several that in 1995 were in outlying sections of the urbanized area experienced strong employment growth between 1995 and 2021 and moved up the ranks based on employment density. In contrast, some of the RAZs that in 1995 were in long-established areas experienced relatively slow employment growth between 1995 and 2021 and fell in the ranks.

A short description of each of the 24 RAZs follows. First, the 20 contiguous RAZs are listed from south to north, moving from east to west. Then, the four outlying RAZs are discussed, followed by one developing RAZ.

### **Contiguous RAZS**

#### **Ocotillo - Chandler**

The boundaries of the RAZ follow:

- North: Pecos Road.
- South: Chandler Heights Road to Riggs Road.
- West: original alignment of Price Road.
- East: Arizona Avenue.

This RAZ includes part of the Price Road - Chandler employment center, which accounts for one-fourth of the RAZ's land area.

The Ocotillo - Chandler RAZ consistently experienced employment growth considerably higher than the median of the 24 RAZs between 1995 and 2021. In 1995, its employment density was just 352. From 1995 through 2007, its density was the lowest of the 24 RAZs. In 2021, its density was 2,232, ranking 19th.

#### **Central Chandler**

The boundaries of the RAZ follow:

- North: Ray Road.

**TABLE 3  
RAZS IN METROPOLITAN PHOENIX, LISTED BY EMPLOYMENT DENSITY IN 2021**

RAZ	Employment Density	Rank, Density					Rank, Percent Change in Density				
		1995	2000	2007	2014	2021	1995- 2000	2000- 2007	2007- 2014	2014- 2021	1995- 2021
Central Phoenix	12,055	1	1	1	1	1	22	10	13	20	17
North Central Phoenix	6,645	2	2	2	2	2	17	20	17	4	18
North Tempe	6,102	3	3	3	3	3	20	16	9	10	12
Sky Harbor Airport	4,683	4	4	4	4	4	16	12	22	18	19
Scottsdale Airport	4,388	13	9	7	5	5	1	8	10	13	6
Esteban Park - Phoenix	3,936	8	7	8	7	6	14	12	18	14	14
South Scottsdale	3,695	7	8	6	10	7	23	9	23	15	16
South Tempe	3,584	16	13	11	11	8	3	6	8	6	8
Central Tempe	3,542	6	5	5	6	9	8	23	14	23	21
West Chandler	3,473	18	17	12	8	10	5	3	4	21	5
Central Chandler	3,407	20	22	22	14	11	11	14	1	2	2
Metrocenter	3,247	5	6	9	9	12	18	24	18	23	24
Deer Valley Airport	3,079	22	18	16	13	13	4	2	5	10	3
Southwest Mesa	3,024	10	11	10	12	14	12	11	21	16	13
Camelback East	2,791	9	10	13	16	15	20	20	16	6	22
Tolleson	2,748	21	20	19	17	16	6	4	3	6	4
Scottsdale Ranch	2,678	19	19	18	18	17	13	5	6	5	9
Durango Curve	2,434	12	12	14	15	18	15	18	12	22	20
Ocotillo - Chandler	2,232	24	24	24	23	19	8	1	2	3	1
South Central Phoenix	2,163	11	14	14	19	20	19	14	24	18	23
West of Durango Curve	2,157	17	21	23	24	21	24	17	10	1	10
Central Scottsdale	2,115	15	15	17	20	22	7	19	20	10	11
Piestewa Peak	2,057	14	16	20	22	23	10	22	14	9	15
Superstition Springs	2,020	23	23	21	21	24	2	7	7	16	7
SUM OF 24 RAZS	3,560										
MARICOPA COUNTY	200										

Source: Calculated from the 2021 Employer Database of the Maricopa Association of Governments.

**MAP 2**  
**REGIONAL ANALYSIS ZONES IN METROPOLITAN PHOENIX WITH THE HIGHEST**  
**EMPLOYMENT DENSITY IN 2021**

Source: Calculated from the 2021 Employer Database of the Maricopa Association of Governments.

- South: Pecos Road.
- West: Price Road.
- East: Arizona Avenue.

This RAZ includes part of the Price Road - Chandler employment center, which accounts for nearly one-fourth of the RAZ's land area.

The Central Chandler RAZ experienced employment growth near the median of the 24 RAZs between 1995 and 2007, but ranked near the top between 2007 and 2021. Its employment density increased from 22nd in 2007 to 11th in 2021.

### **West Chandler**

The boundaries of the RAZ follow:

- North: city limits (approximately Ray Road).
- South: Pecos Road.
- West: I-10 Freeway.
- East: Price Road.

This RAZ includes nearly all of the West Chandler Boulevard employment center, which accounts for a high 40 percent of the RAZ's land area.

The West Chandler RAZ's employment growth rate between 1995 and 2014 was near the top of the 24 RAZs, but it ranked 21st between 2014 and 2021. Its employment density rank increased from 18th in 1995 to eighth in 2014, but slipped to 10th in 2021.

### **Southwest Mesa**

The boundaries of the RAZ follow:

- North: Southern Avenue.
- South: city limits (Baseline Road to south of Guadalupe Road).
- West: city limits (approximately Price Road).
- East: Country Club Drive to Gilbert Road.

This RAZ includes all of the Superstition Freeway – West Mesa employment center, which accounts for 29 percent of the RAZ's land area.

The Southwest Mesa RAZ experienced employment growth near the median of the 24 RAZs except for ranking near the bottom between 2007 and 2014. Its employment density rank slipped from 10th among the 24 RAZs in 2007 to 14th in 2021.

### **South Tempe**

The boundaries of the RAZ follow:

- North: mostly Baseline Road.
- South: city limits (south of Warner Road).
- West: city limits (mostly the I-10 Freeway).
- East: Price Road.

This RAZ includes nearly all of the Elliot Road & Priest Drive employment center, which accounts for 17 percent of the RAZ's land area.

The South Tempe RAZ experienced employment growth consistently higher than the median of the 24 RAZs between 1995 and 2021, with its employment density rising from 1,297 in 1995 to 3,584 in 2021. Its employment density rank increased from 16th in 1995 to eighth in 2021.

### **Central Tempe**

The boundaries of the RAZ follow:

- North: Broadway Road.
- South: Baseline Road.
- West: 48th Street.
- East: city limits (east of Price Road).

This RAZ includes part of the University Drive & Hohokam Freeway employment center, which accounts for 23 percent of the RAZ's land area.

The Central Tempe RAZ experienced employment growth below the median of the 24 RAZs between 2000 and 2021. Its employment density rank slipped from fifth in 2000 and 2007 to ninth in 2021.

### **North Tempe**

The boundaries of the RAZ follow:

- North: city limits (approximately McKellips Road).
- South: Broadway Road.
- West: 48th Street.
- East: city limits (approximately Price Road).

This RAZ includes all of the Downtown Tempe and McClintock & University Drives employment centers, and part of the University Drive & Hohokam Freeway and Red Mountain Freeway centers. These employment centers account for a high 42 percent of the RAZ's land area.

The North Tempe RAZ experienced employment growth below the median of the 24 RAZs between 1995 and 2007, but ranked above the median between 2007 and 2021. It ranked third in employment density throughout the 1995-to-2021 period. With a density of 6,102 in 2021, it is one of only three RAZs with a density of more than 6,000.

### **South Scottsdale**

The boundaries of the RAZ follow:

- North: Chaparral Road.
- South: city limits (approximately McKellips Road).
- West: city limits (approximately 64th Street).
- East: mostly Pima Road.

This RAZ includes all of the Downtown Scottsdale employment center, which accounts for 16 percent of the RAZ's land area.

The South Scottsdale RAZ experienced employment growth below the median of the 24 RAZs except between 2000 and 2007. Its rank on employment density fluctuated between sixth and 10th, ranking seventh in both 1995 and 2021.



### **Central Scottsdale**

The boundaries of the RAZ follow:

- North: Shea Boulevard.
- South: Chaparral Road.
- West: mostly Scottsdale Road.
- East: Pima Road.

No employment center is within this RAZ.

The Central Scottsdale RAZ experienced fluctuating employment growth relative to the median of the 24 RAZs. Its rank on employment density dropped from 15th in 1995 and 2000 to 22nd in 2021.

### **Scottsdale Airport**

The boundaries of the RAZ follow:

- North: Frank Lloyd Wright Boulevard.
- South: mostly Shea Boulevard
- West: 56th Street to Scottsdale Road.
- East: Pima Road.

This RAZ includes most of the Hayden & Greenway Roads employment center, which accounts for a high 36 percent of the RAZ's land area.

The Scottsdale Airport RAZ had the greatest employment growth of the 24 RAZs between 1995 and 2000, but its relative growth rate has slipped since then to the median of the RAZs. Its rank on employment density rose from 13th in 1995 to fifth in 2014 and 2021. In 2021, its density was 4,388, one of just five RAZs with a density of more than 4,000.

### **Scottsdale Ranch**

The boundaries of the RAZ follow:

- North: Central Arizona Project Canal.
- South: south of Shea Boulevard.
- West: Pima Road.
- East: varies, approximately 112th Street.

This RAZ includes a small part of the Hayden & Greenway Roads employment center, which accounts for a low 2 percent of the RAZ's land area.

The Scottsdale Ranch RAZ experienced employment growth above the median of the 24 RAZs between 2000 and 2021. Its rank on employment density advanced from 19th in 1995 and 2000 to 17th in 2021.

### **Esteban Park - Phoenix**

This RAZ is west of (and adjacent to) the North Tempe and Central Tempe RAZs. Its boundaries follow:

- North: the Salt River to University Drive.
- South: Southern Avenue.
- West: Seventh Avenue.

- East: 48th Street.

This RAZ includes nearly all of the Broadway Road & 40th Street employment center, which accounts for 32 percent of the RAZ's land area.

The Esteban Park RAZ experienced employment growth near the median of the 24 RAZs between 1995 and 2021. Its rank on employment density advanced from eighth in 2007 to sixth in 2021.

### **Sky Harbor Airport**

The boundaries of the RAZ follow:

- North: Van Buren Street to McDowell Road.
- South: mostly the Salt River.
- West: 16th Street.
- East: 44th Street to 56th Street.

This RAZ includes all of the Buckeye Road & 24th Street employment center and parts of the East Washington Street, Broadway Road & 40th Street, and Red Mountain Freeway employment centers. These employment centers account for a very high 60 percent of the RAZ's land area.

The Sky Harbor Airport RAZ experienced employment growth generally below the median of the 24 RAZs between 1995 and 2021. Its rank on employment density held steady at fourth. Its density was 4,683 in 2021, one of only five RAZs with a figure above 4,000.

### **Camelback East**

One RAZ separates this RAZ from the Sky Harbor Airport RAZ, but this RAZ is west of (and adjacent to) the South Scottsdale RAZ. Its boundaries follow:

- North: mostly Camelback Road.
- South: Thomas Road.
- West: 16th Street.
- East: city limits (approximately 64th Street).

This RAZ includes part of the East Camelback Road employment center, which accounts for 11 percent of the RAZ's land area.

The Camelback East RAZ experienced employment growth below the median of the 24 RAZs between 1995 and 2014, but it ranked sixth among the 24 RAZs between 2014 and 2021. Its rank on employment density fell from ninth in 1995 to 16th in 2014, but it ranked 15th in 2021.

### **Piestewa Peak**

The boundaries of the RAZ follow:

- North: north edge of the Phoenix Mountain Preserve.
- South: mostly Camelback Road.
- West: Seventh Street.
- East: 32nd Street to 40th Street.

This RAZ includes all of the Glendale Avenue & 16th Street employment center and part of the East Camelback Road employment center. These centers account for 20 percent of the RAZ's land area.

The Piestewa Peak RAZ experienced employment growth near the median of the 24 RAZs, except for ranking near the bottom between 2000 and 2007. Its rank on employment density fell from 14th in 1995 to 23rd in 2021.

### **South Central Phoenix**

This RAZ is west of (and adjacent to) the Sky Harbor Airport and Esteban Park RAZs. Its boundaries follow:

- North: between Buckeye Road and Van Buren Street.
- South: South Mountain Park.
- West: 19th Avenue to I-17 Freeway.
- East: 16th Street.

This RAZ includes a small part of the Downtown Phoenix employment center, which accounts for only 3 percent of the RAZ's land area.

The South Central Phoenix RAZ experienced employment growth below the median of the 24 RAZs between 1995 and 2021. Its rank on employment density fell from 11th in 1995 to 20th in 2021.

### **Central Phoenix**

The boundaries of the RAZ follow:

- North: McDowell Road.
- South: between Van Buren Street and Buckeye Road.
- West: I-17 Freeway.
- East: 16th Street.

This RAZ includes nearly all of the Downtown Phoenix employment center, all of the State Capitol and Papago Freeway centers, and a small part of the East Washington Street center. These centers account for a high 52 percent of the RAZ's land area.

The Central Phoenix RAZ experienced employment growth below the median of the 24 RAZs between 1995 and 2000 and again between 2014 and 2021, with growth near the median between 2000 and 2014. Its rank on employment density has consistently been first. Its 2021 employment density of 12,055 was 81 percent higher than the second-ranked North Central Phoenix RAZ.

### **North Central Phoenix**

The boundaries of the RAZ follow:

- North: Camelback Road.
- South: McDowell Road.
- West: I-17 Freeway or 19th Avenue.
- East: 16th Street to 24th Street.

This RAZ includes all of the Midtown Phoenix employment center and part of the East Camelback Road center. These centers account for 26 percent of the RAZ's land area.

The North Central Phoenix RAZ experienced employment growth below the median of the 24 RAZs between 1995 and 2014, but it ranked fourth between 2014 and 2021. Its rank on employment density has consistently been second. With a density of 6,645 in 2021, it is one of only three RAZs with a density of more than 6,000.

### **Durango Curve**

This RAZ is west of (and adjacent to) the Central Phoenix and South Central Phoenix RAZs. Its boundaries follow:

- North: Van Buren Street.
- South: Buckeye Road to Broadway Road.
- West: 35th Avenue to 43rd Avenue.
- East: 19th Avenue to I-17 Freeway.

This RAZ includes part of the Buckeye Road & 43rd Avenue employment center, which accounts for 17 percent of the RAZ's land area.

The Durango Curve RAZ experienced employment growth below the median of the 24 RAZs between 1995 and 2021. Its rank on employment density fell from 12th in 1995 and 2000 to 18th in 2021.

### **West of Durango Curve**

This RAZ is west of (and adjacent to) the Durango Curve RAZ. Its boundaries follow:

- North: Van Buren Street to Buckeye Road.
- South: Southern Avenue to Broadway Road.
- West: 67th Avenue.
- East: 35th Avenue to 43rd Avenue.

This RAZ includes part of the Buckeye Road & 43rd Avenue employment center, which accounts for 21 percent of the RAZ's land area.

The West of Durango Curve RAZ experienced employment growth below the median of the 24 RAZs between 1995 and 2007, but growth higher than the median since then, ranking first between 2014 and 2021. Its rank on employment density fell from 17th in 1995 to 24th in 2014, but rose to 21st in 2021.

## **Outlying RAZS**

### **Tolleson**

This RAZ is one mile west of the western border of the West of Durango Curve RAZ. Its boundaries follow:

- North: Van Buren Street to McDowell Road.
- South: Buckeye Road.
- West: 99th Avenue to 107th Avenue.
- East: 75th Avenue to 83rd Avenue.

No employment center is within this RAZ.

The Tolleson RAZ experienced employment growth above the median of the 24 RAZs between 1995 and 2021. Its rank on employment density rose from 21st in 1995 (density of 871) to 16th in 2021 (density of 2,748).

### **Metrocenter**

This RAZ is several miles away from any of the other 24 RAZs. Its boundaries follow:

- North: Cactus Road.

- South: Northern Avenue.
- West: mostly 43rd Avenue.
- East: 19th Avenue.

This RAZ includes all of the I-17 Freeway & Peoria Avenue employment center, which accounts for 32 percent of the RAZ’s land area.

The Metrocenter RAZ experienced employment growth considerably below the median of the 24 RAZs between 1995 and 2021. Its rank on employment density fell from fifth in 1995 to 12th in 2021.

### **Deer Valley Airport**

This RAZ is several miles away from any of the other 24 RAZs. Its boundaries follow:

- North: Central Arizona Project Canal to north of Dynamite Road.
- South: 101 Freeway.
- West: I-17 Freeway.
- East: Central Arizona Project Canal.

This RAZ includes most of the I-17 Freeway North of 101 Freeway employment center, which accounts for 31 percent of the RAZ’s land area.

The Deer Valley Airport RAZ experienced employment growth above the median of the 24 RAZs between 1995 and 2021. Its rank on employment density rose from 22nd in 1995 (density of 830) to 13th in 2021 (density of 3,079).

### **Superstition Springs**

This RAZ begins three miles east of the eastern border of the Southwest Mesa RAZ. Its boundaries follow:

- North: University Drive.
- South: mostly Baseline Road.
- West: Greenfield Road.
- East: Sossaman Road.

This RAZ includes most of the Superstition Freeway & Power Road employment center, which accounts for 19 percent of the RAZ’s land area.

The Superstition Springs RAZ experienced employment growth higher than the median of the 24 RAZs between 1995 and 2014 but growth was less than the median between 2014 and 2021. Its rank on employment density rose from 23rd in 1995 and 2000 to 21st in 2007 and 2014, but dropped to last in 2021.

## **Developing RAZ**

### **West Central Gilbert**

This developing RAZ begins three miles east of the Central Chandler RAZ. Its boundaries follow:

- North: Warner Road.
- South: Germann Road.
- West: McQueen Road to Gilbert Road.
- East: Greenfield Road.

No employment center is within this RAZ.

Employment density in this RAZ was 1,940 in 2021, up from just 41 in 1995. It had a higher employment growth rate than each of the 24 RAZs in each period except between 2014 and 2021, when two of the 24 RAZs had a higher rate.