
The Sun Corridor: A Competitive Mindset

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- Dan Hunting, Morrison Institute senior policy analyst

April 20, 2015

The Megapolitan Concept

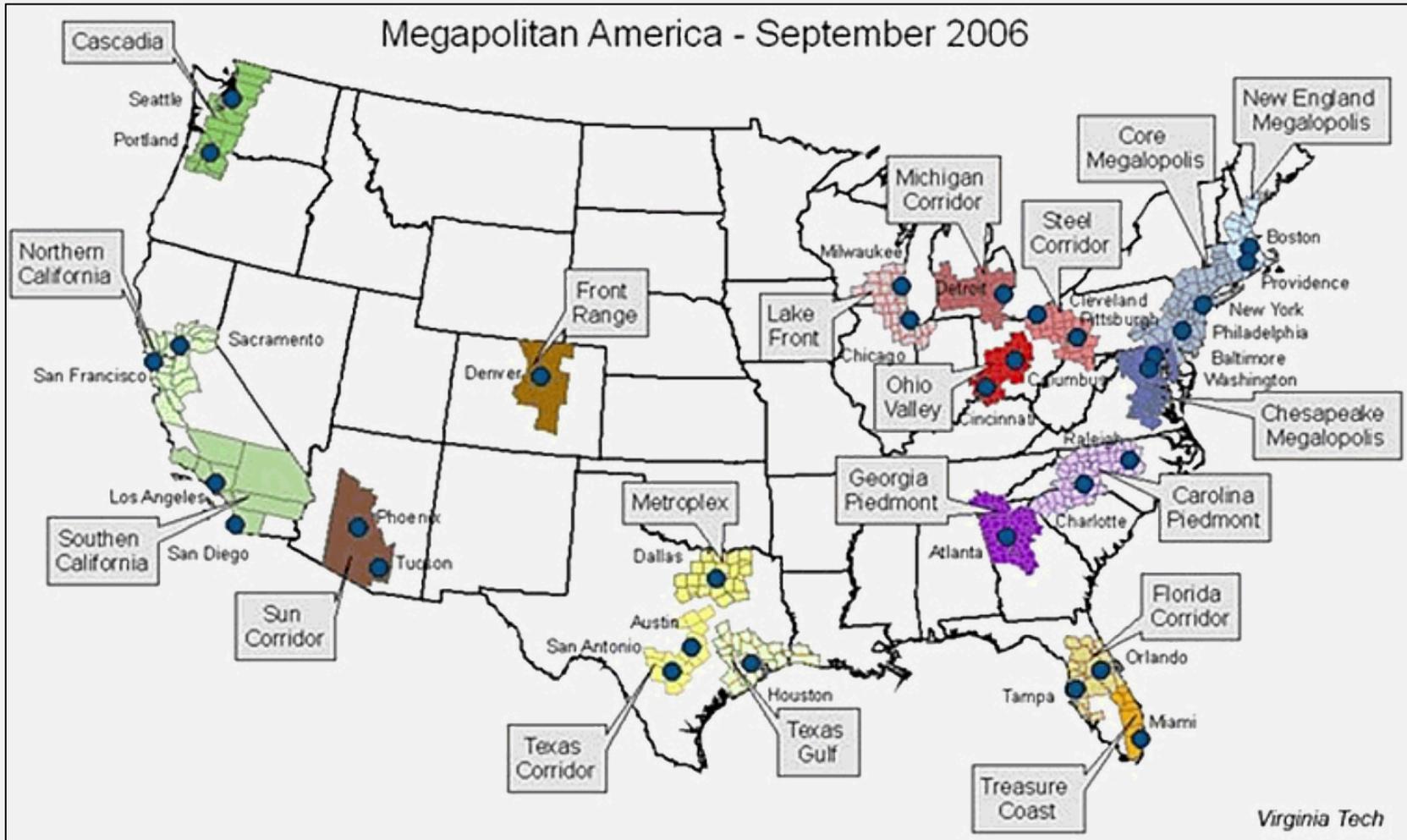


The Megapolitan Concept

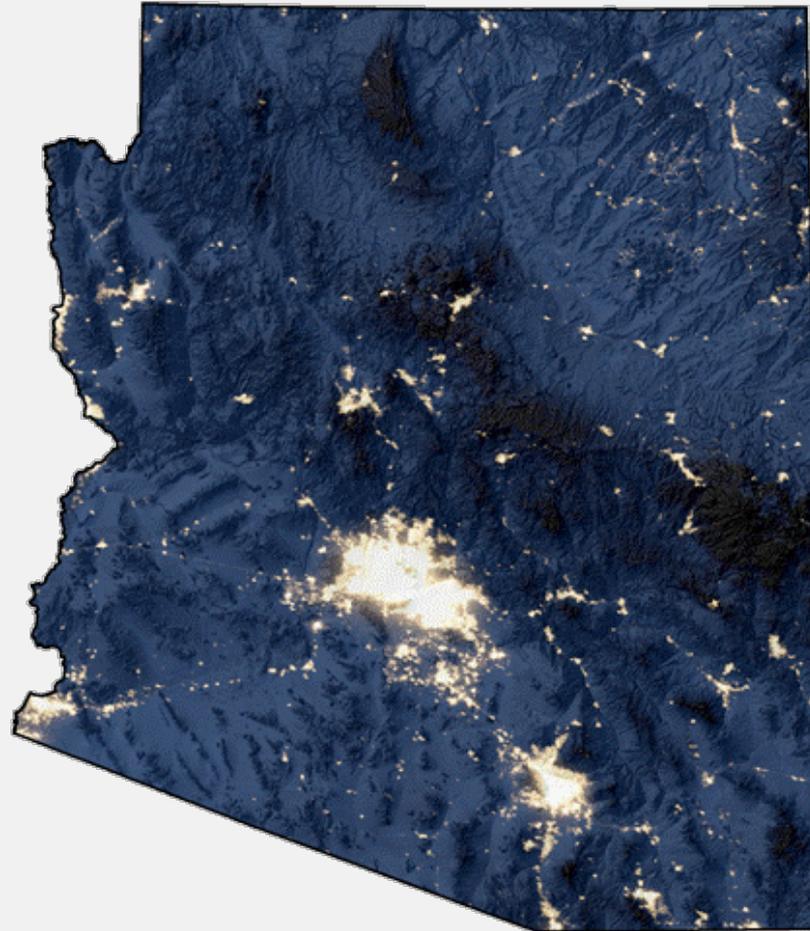


Megapolitan areas are evident in night time photos from space. They don't follow state boundaries.

The Megapolitan Concept



The Megapolitan Concept



Political boundaries are not evident from space. It's impossible to see a line between Tempe and Mesa.

Five Areas of Concern for the Sun Corridor

- The trend is “Glocal”
 - *Big fish in relatively small ponds, Phoenix, Tucson, and the Sun Corridor lack a global profile.*
- Governance
 - *The Sun Corridor has hundreds of players and no one’s in charge.*
- Two trillion dollar questions:
 - *Can quality ever hope to compete with easy money and 50 years of tradition?*
 - *Who will pay for public systems and spaces?*
- What about water?
 - *The oil of the 21st century, water is a critical, limited resource*
- The tragedy of the sunshine
 - *Each person adds to and subtracts from the sun corridor’s resources.*

Sun Corridor Quick Facts

	Sun Corridor ¹	Front Range ²	Atlanta ³	St. Louis ⁴	Seattle ⁵
National Forest	17%	19%	1%	1%	28%
National Parks	2%	1%	0%	0%	5%
Wildlife	2%	1%	1%	0%	0%
Local or State Parks	1%	2%	0%	1%	12%
Sub Total - Protected Land	23%	23%	3%	3%	45%
Military	4%	1%	1%	0%	2%
Tribal Lands	16%	0%	0%	0%	1%
BLM	15%	1%	0%	0%	0%
Other Govt. Land	0%	0%	0%	1%	0%
State Trust Land	18%	5%	0%	0%	0%
Private	23%	70%	96%	95%	51%
Total	100%	100%	100%	100%	100%

Calculated using PAD-US Protected Area Database and Census boundaries

1 Phoenix, Tucson, and Prescott Metropolitan and Nogales Micropolitan Areas

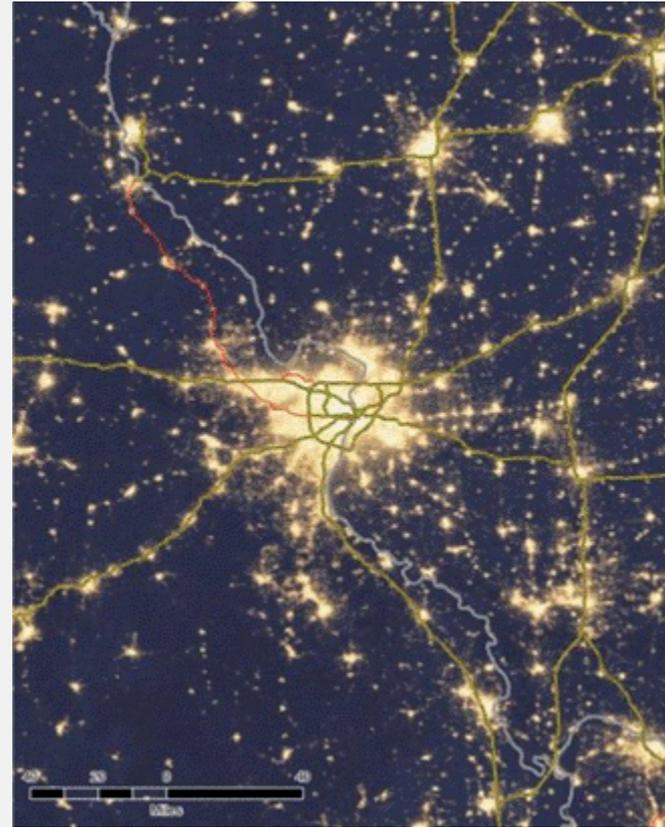
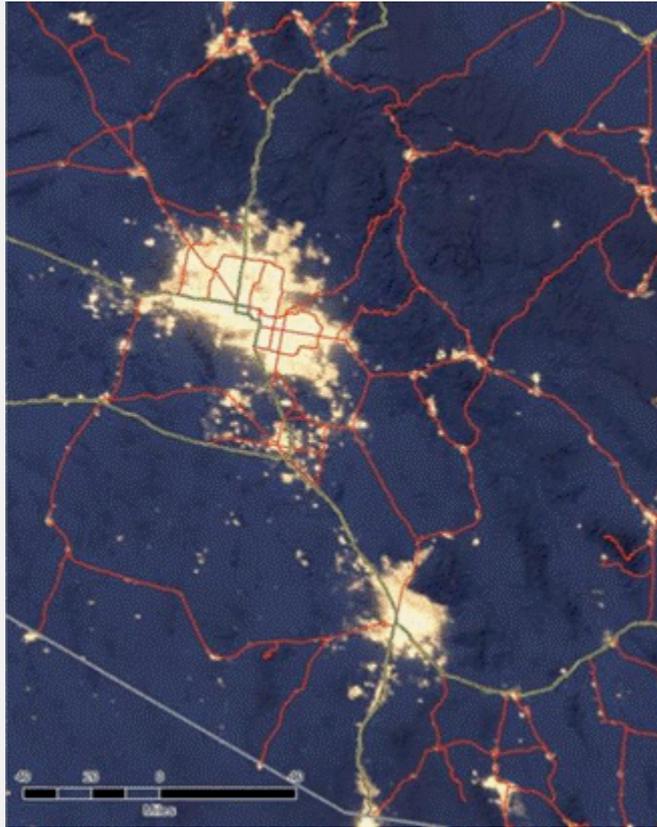
2 Denver, Colorado Springs, Boulder, Fort Collins, and Greeley Metropolitan Areas

3 Atlanta - Sandy Springs - Marietta Metropolitan Area

4 St. Louis, MO-IL Metropolitan Area

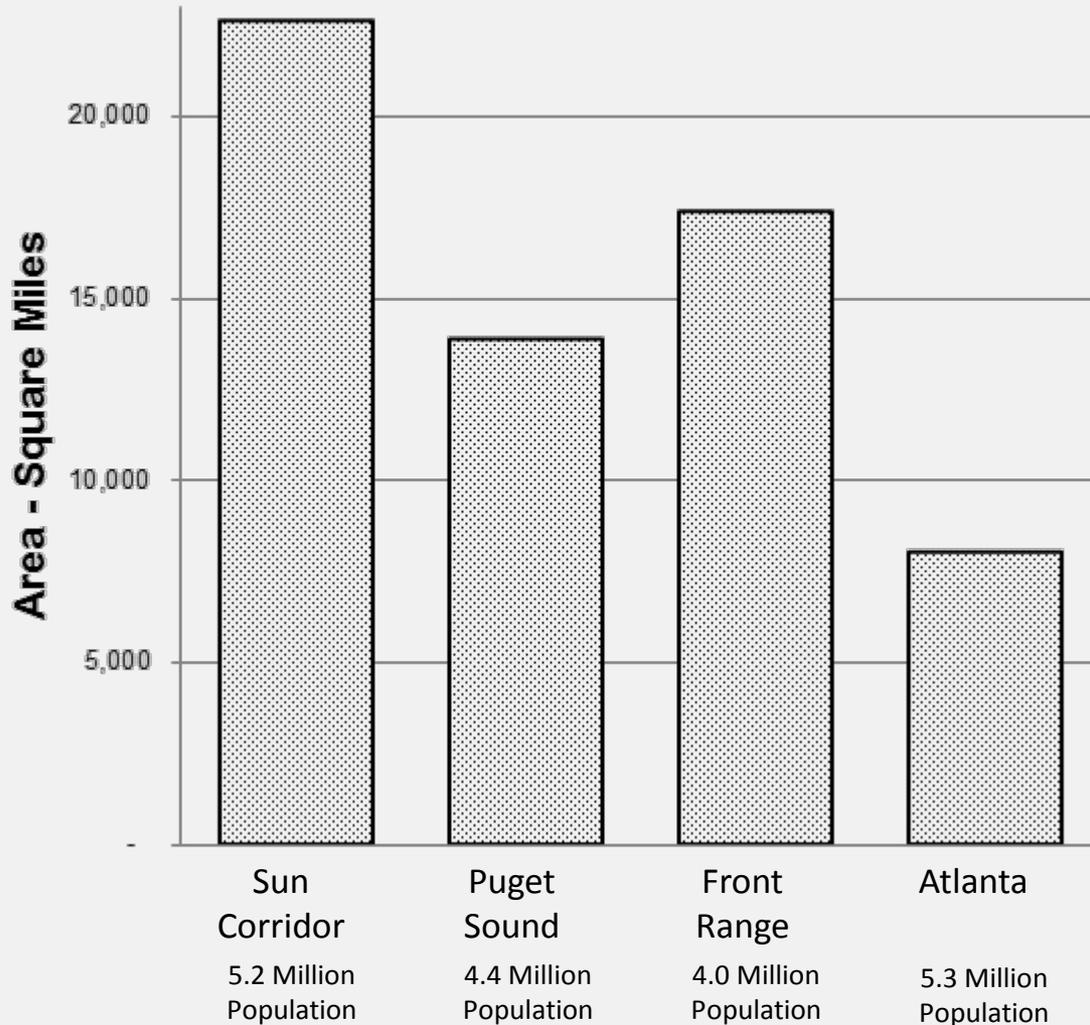
5 Seattle-Tacoma-Bellevue Metropolitan Area

Comparing Megapolitan Areas



The Sun Corridor and metro St. Louis shown at the same scale. Each area has the same number of people living in the same area, yet they have very different urban forms.

Comparing Megapolitan Areas

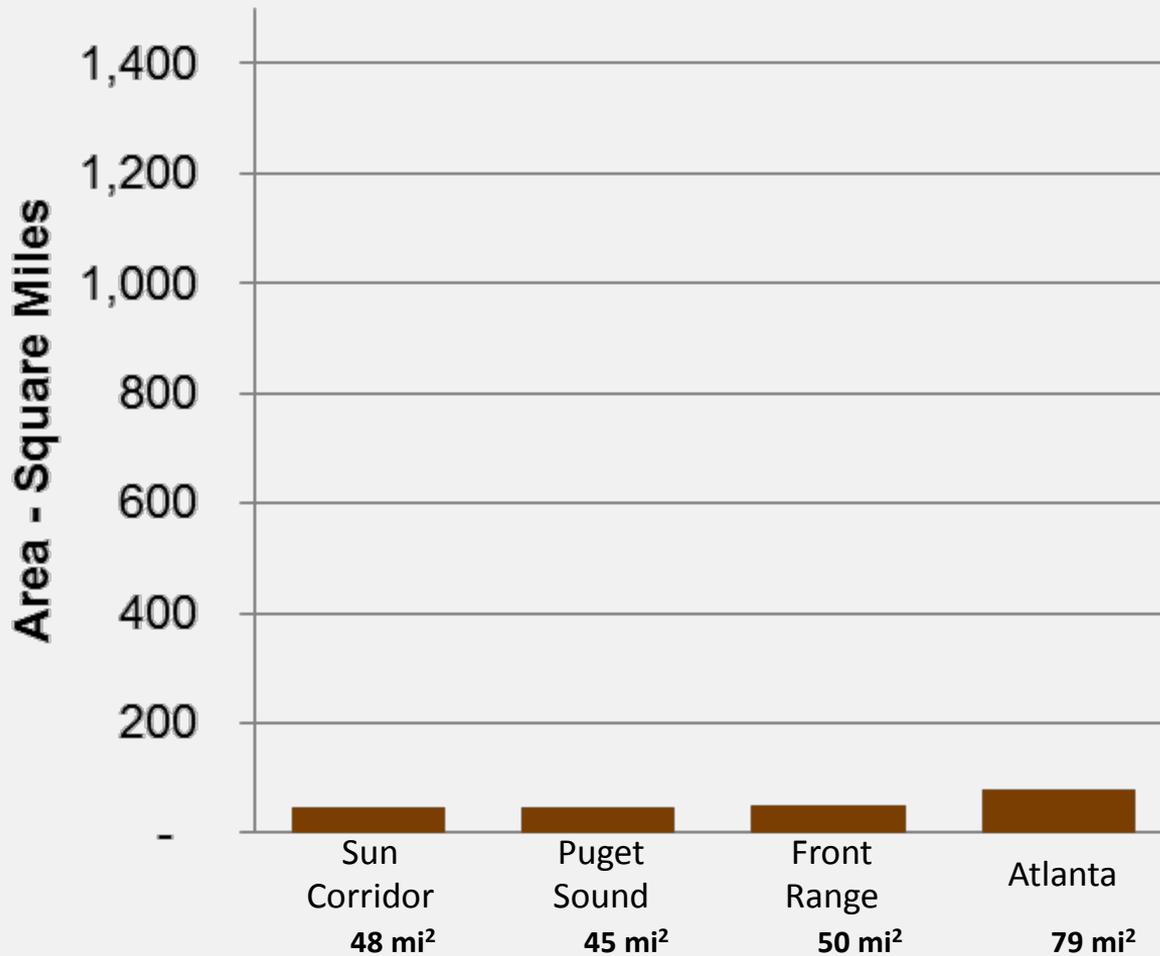


The Sun Corridor is geographically large.

This chart shows that it has almost three times the area of Atlanta, with about the same population.

In reality, the Sun Corridor is much denser than metro Atlanta . . .

Comparing Megapolitan Areas

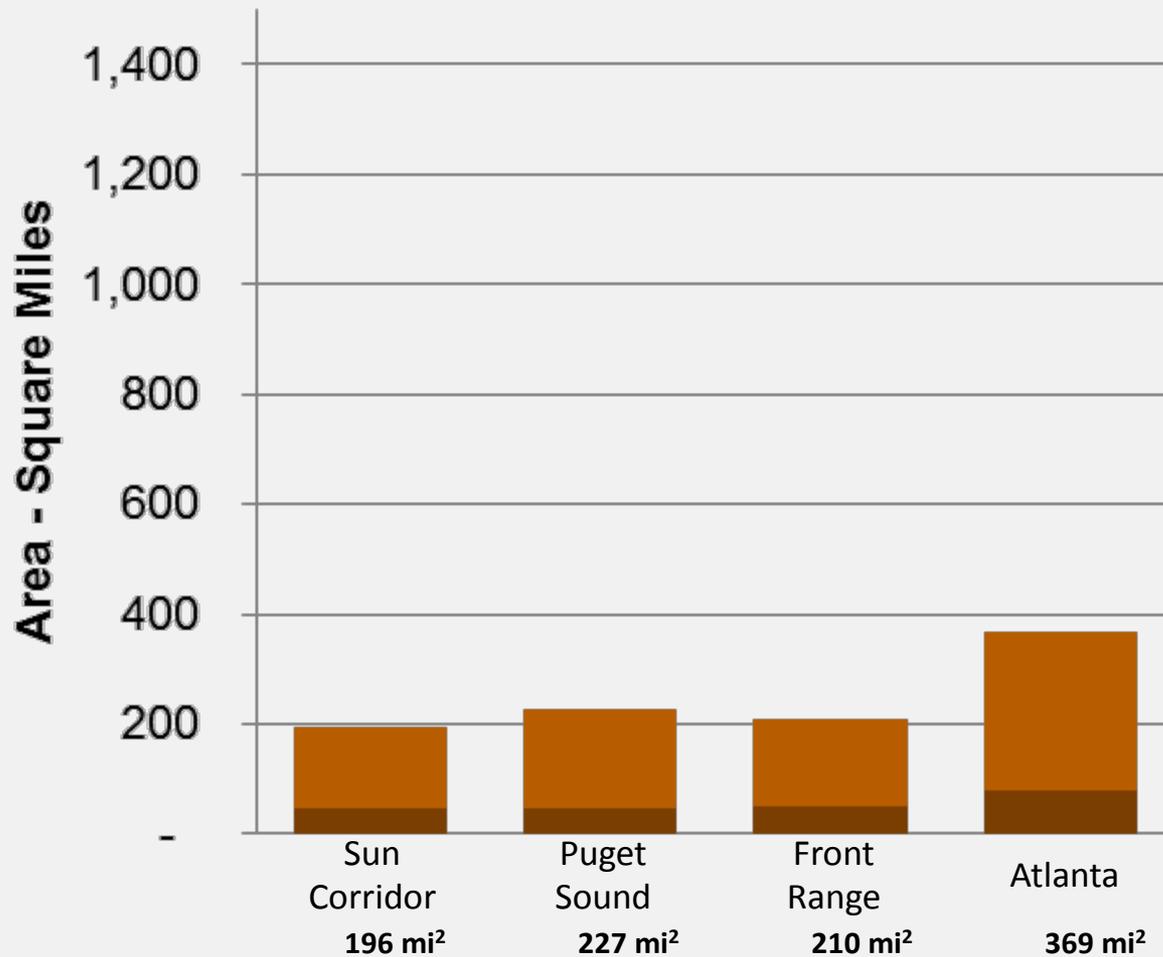


For a population of 500,000

The most dense areas of the Sun Corridor, metro Seattle, and metro Denver house a half-million people in about 50 square miles.

Atlanta's densest neighborhoods need about 80 square miles for the same 500,000 population

Comparing Megapolitan Areas



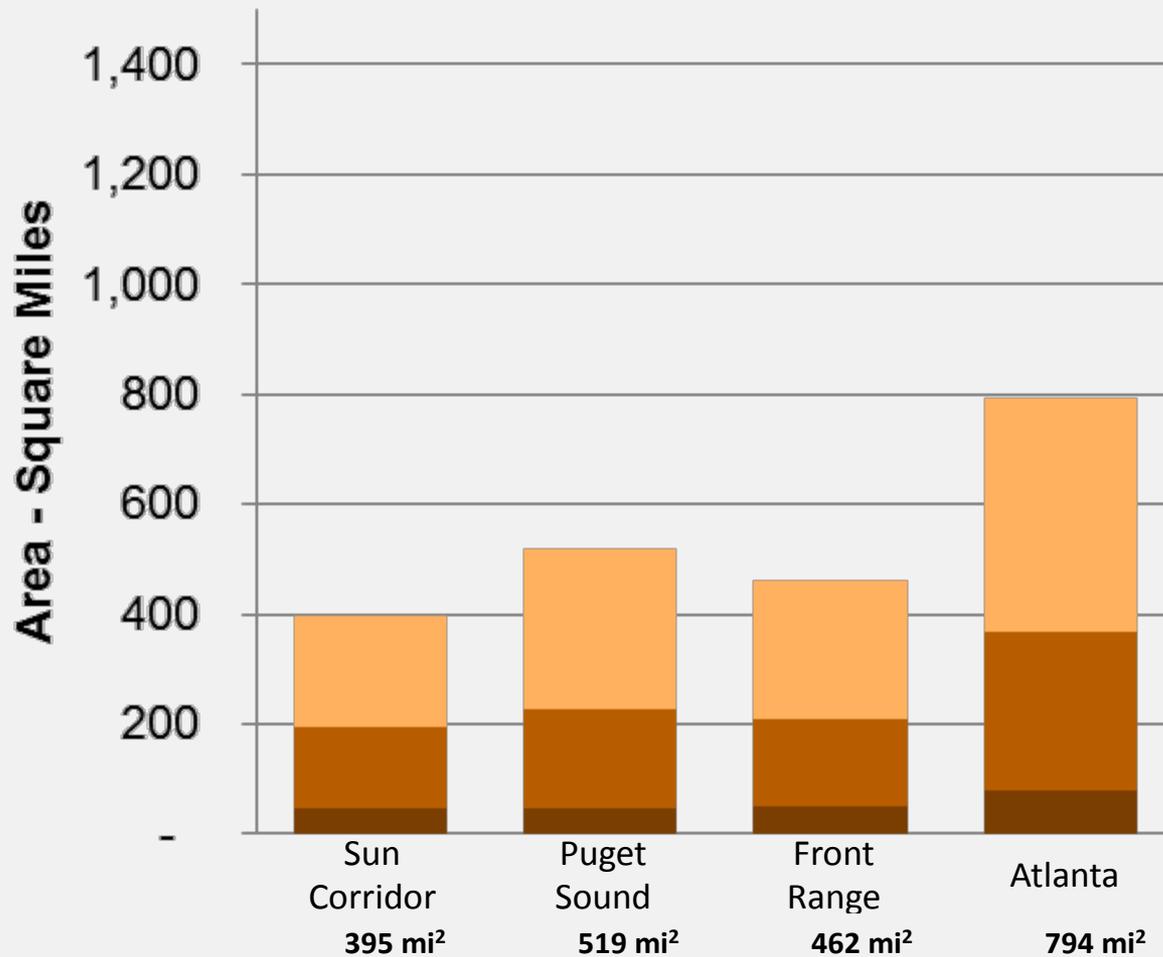
For a population of 1,500,000

1.5 million people in the Sun Corridor live in less than 200 square miles.

Seattle and Denver need a little over 200 square miles for the same population.

Atlanta's most tightly-packed 1.5 million people cover almost 400 square miles.

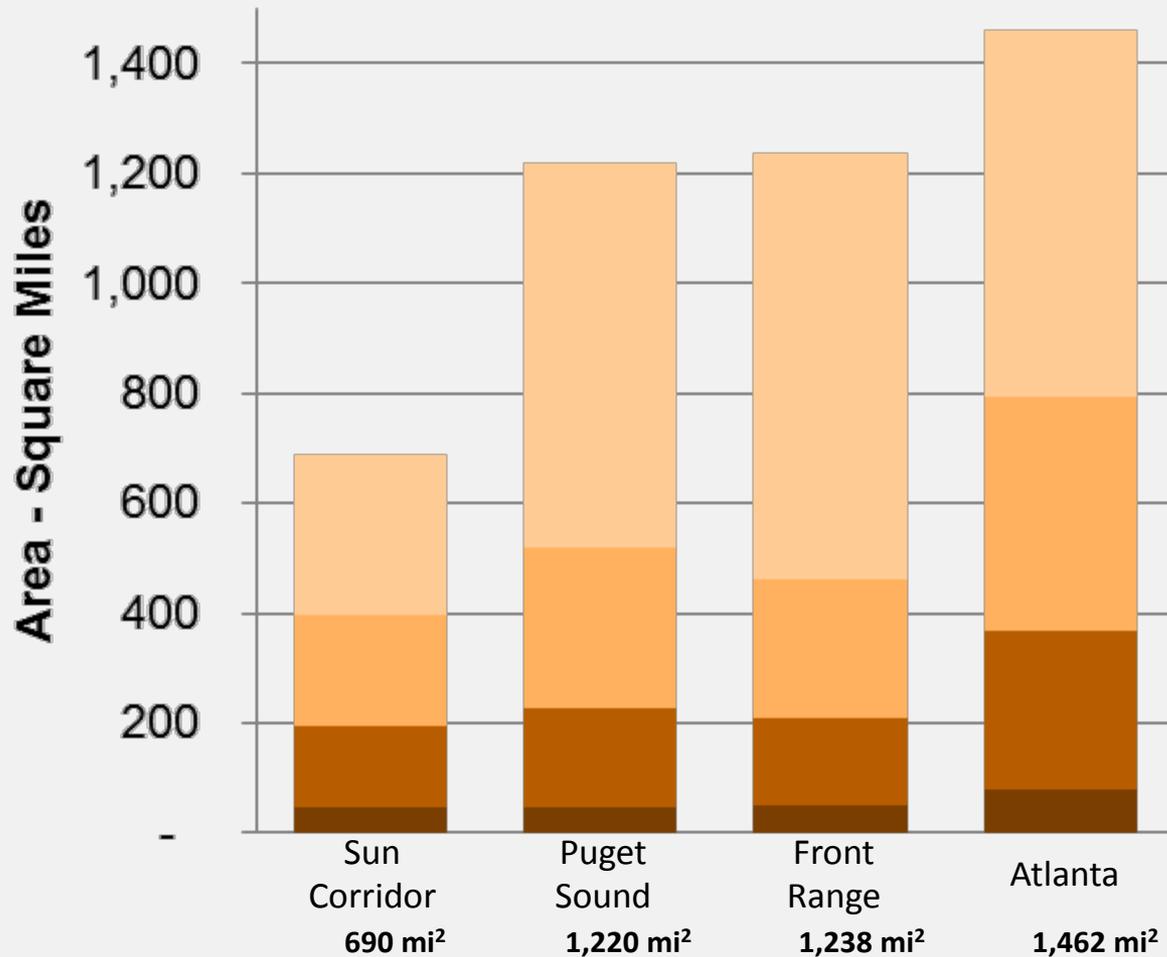
Comparing Megapolitan Areas



For a population of 2,500,000

The Sun Corridor needs less than 400 square miles for 2.5 million residents.

Comparing Megapolitan Areas



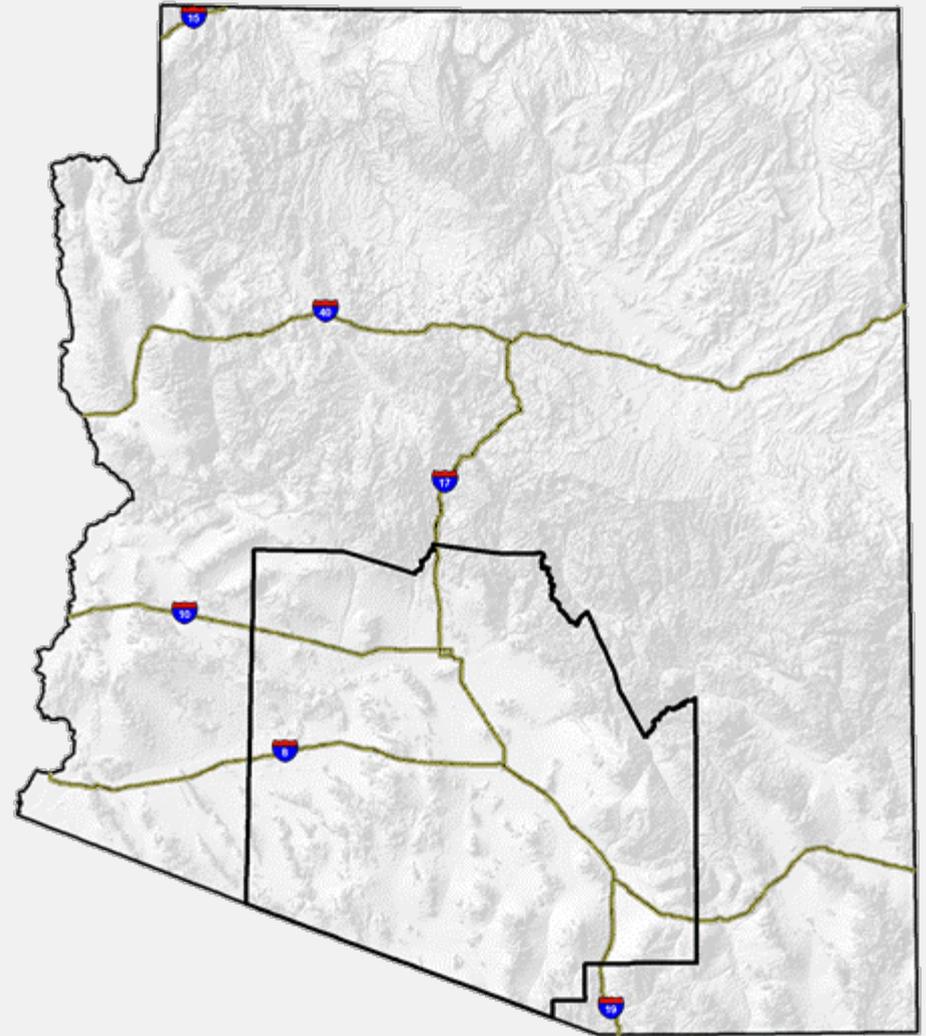
For a population of 3,500,000

3.5 million people in the Sun Corridor live in Census Tracts that cover less than 700 square miles.

Metro Seattle, Denver, and Atlanta require much more area to house the same population.

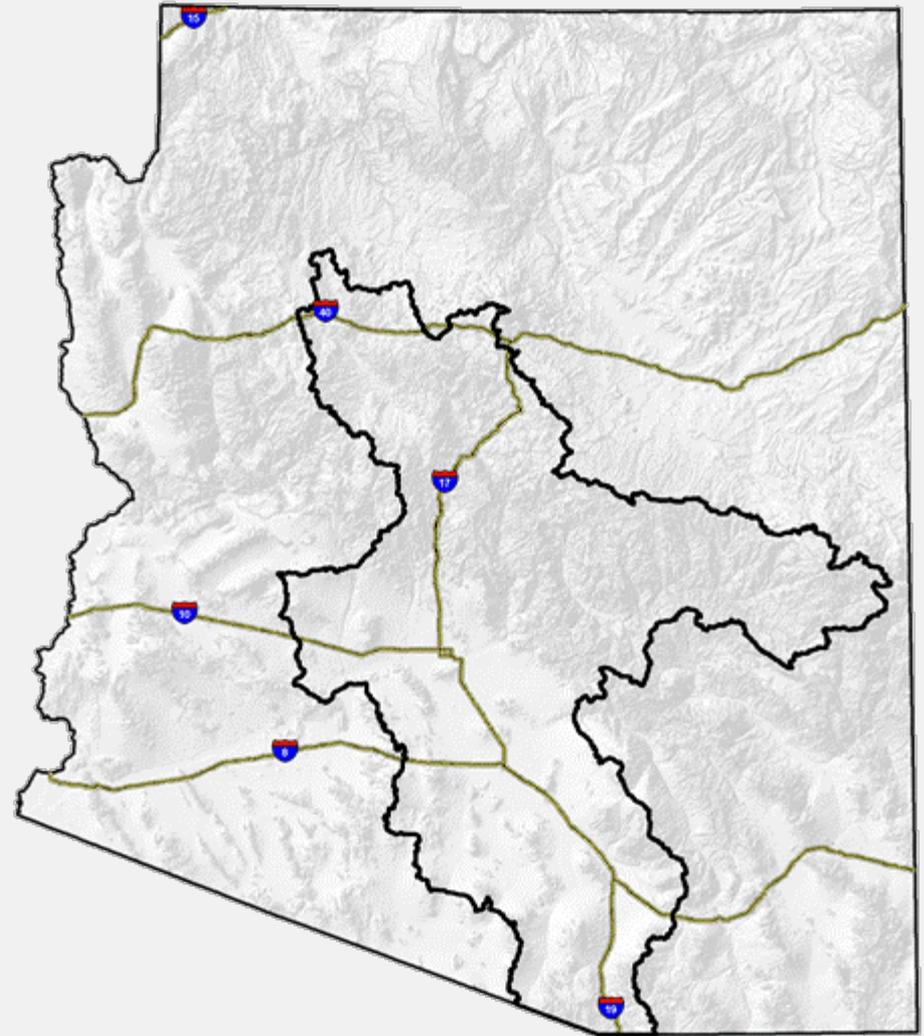
Boundaries of the Sun Corridor

The three counties of Maricopa, Pima, and Pinal comprise a minimal definition of the Sun Corridor.



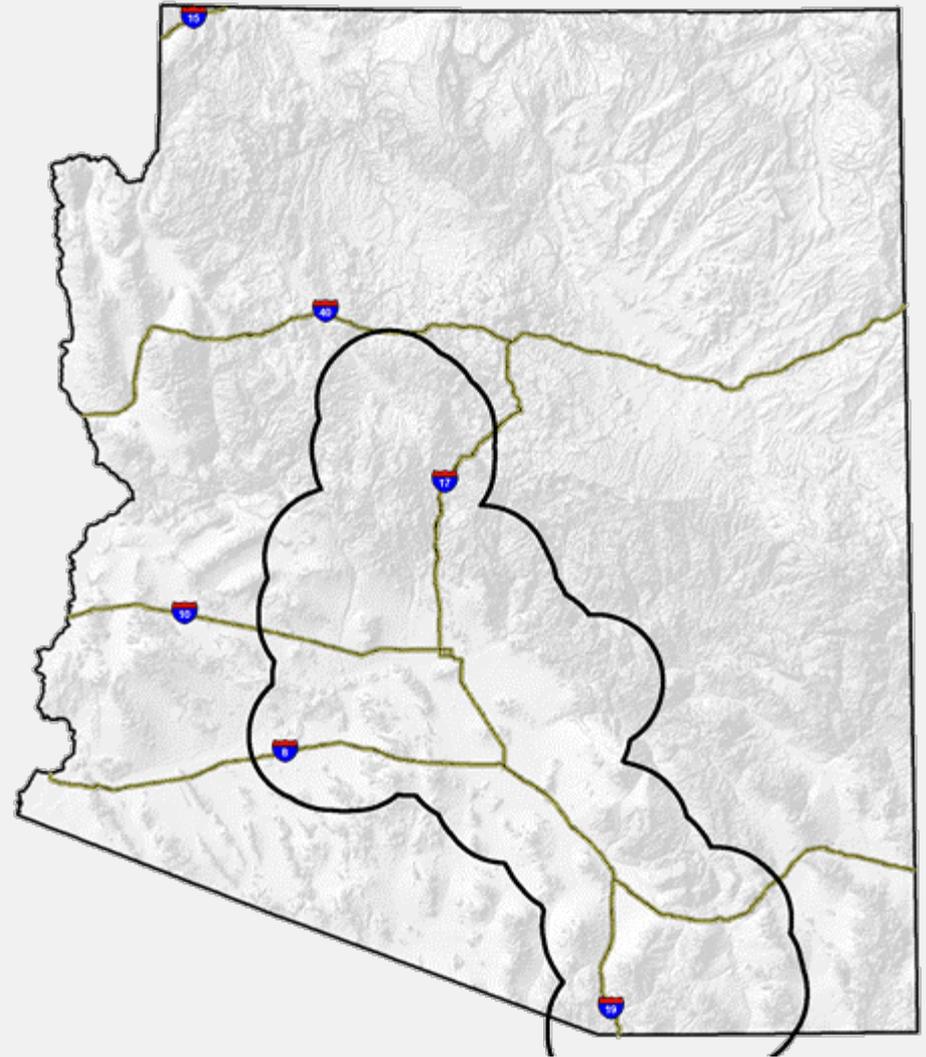
Boundaries of the Sun Corridor

Natural features can also define the Sun Corridor. These are the water basins that overlay the region.



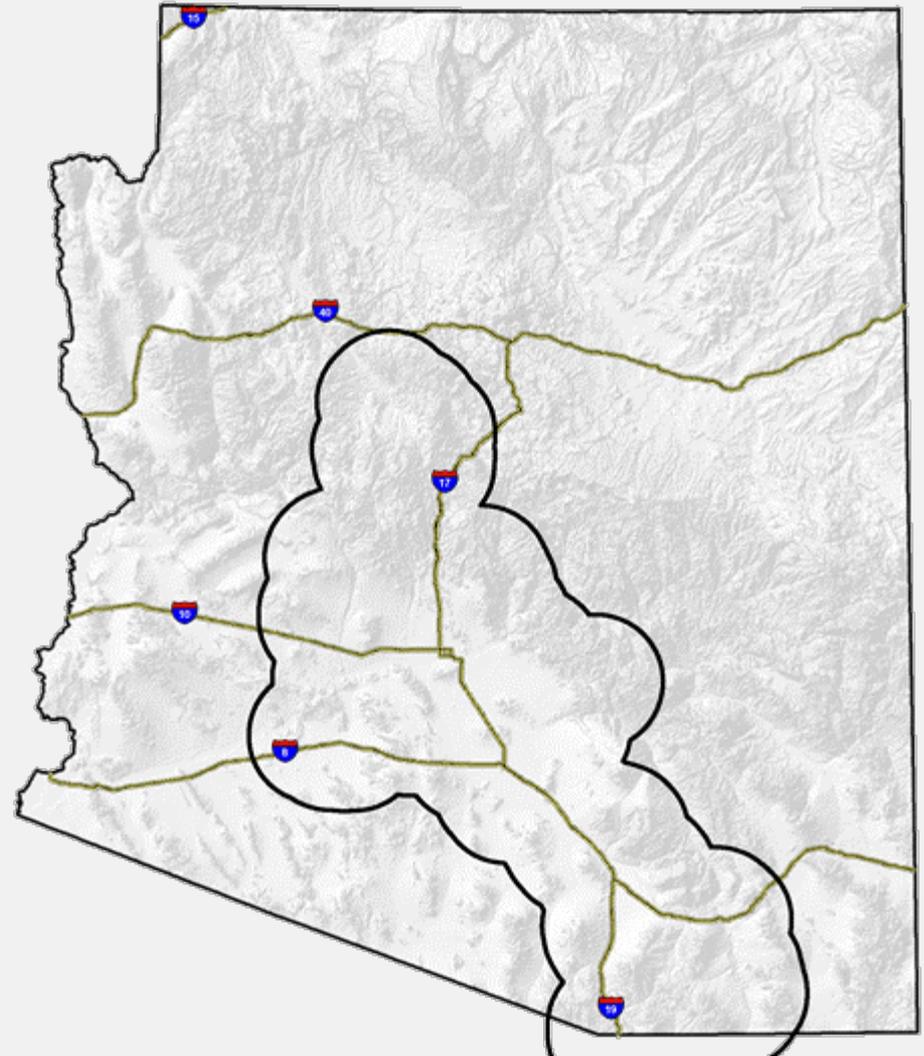
Boundaries of the Sun Corridor

A 25-mile around existing city limits gives a picture of where economic activity takes place and where future growth is likely to happen. Note that this model extends into Mexico.



Not a Solid Mass of Development

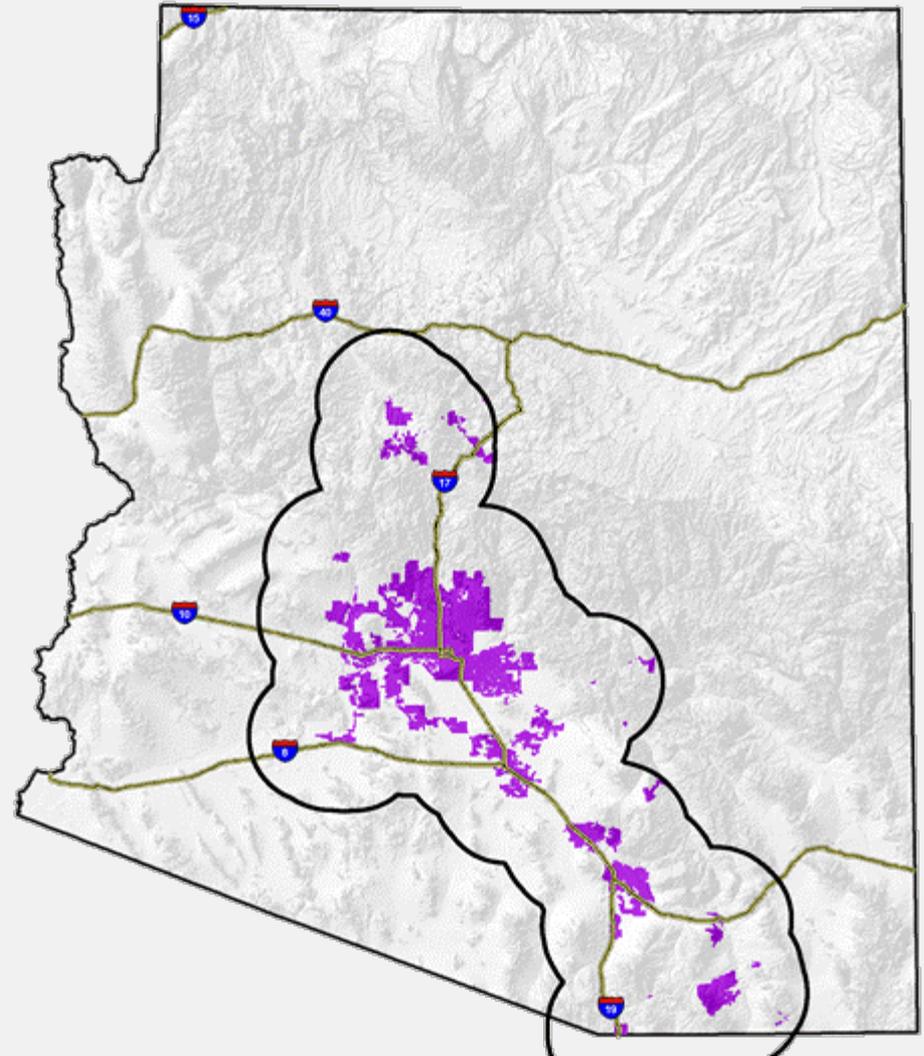
There will never be unbroken development stretching between Phoenix and Tucson because of all the protected land in the Sun Corridor.



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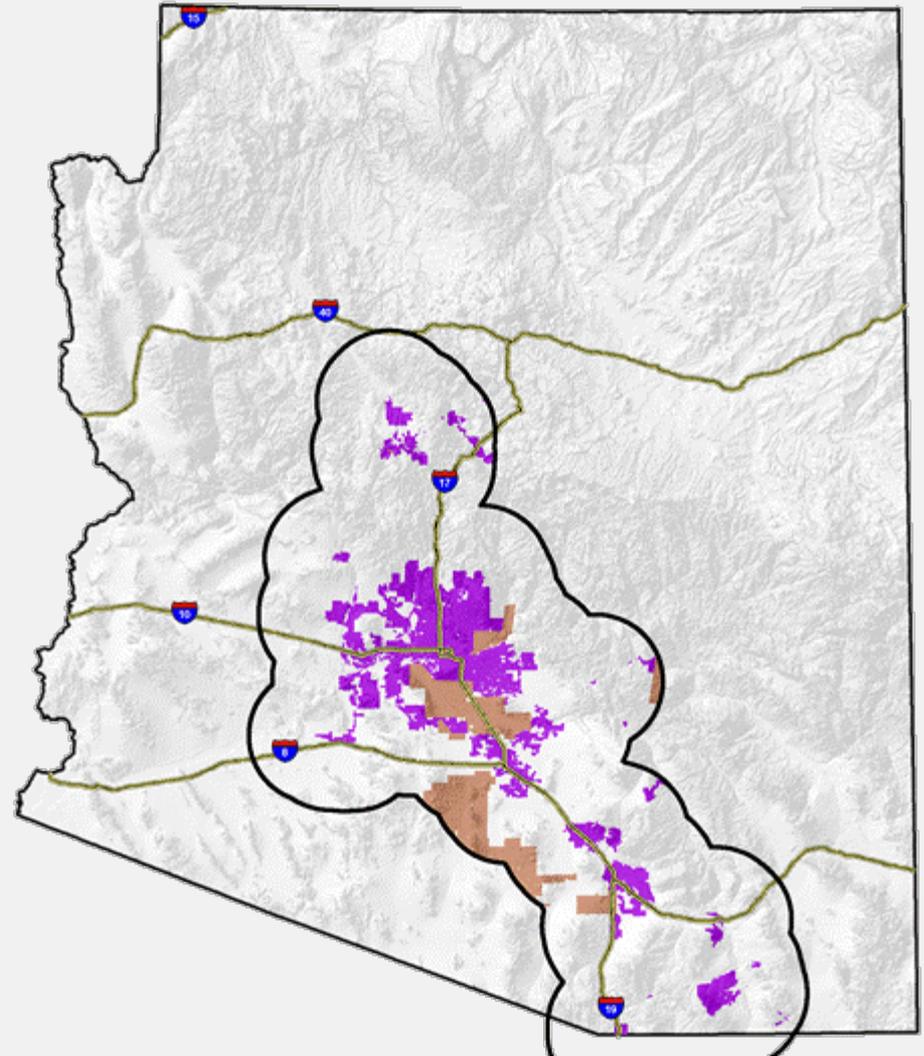
- Existing City Limits



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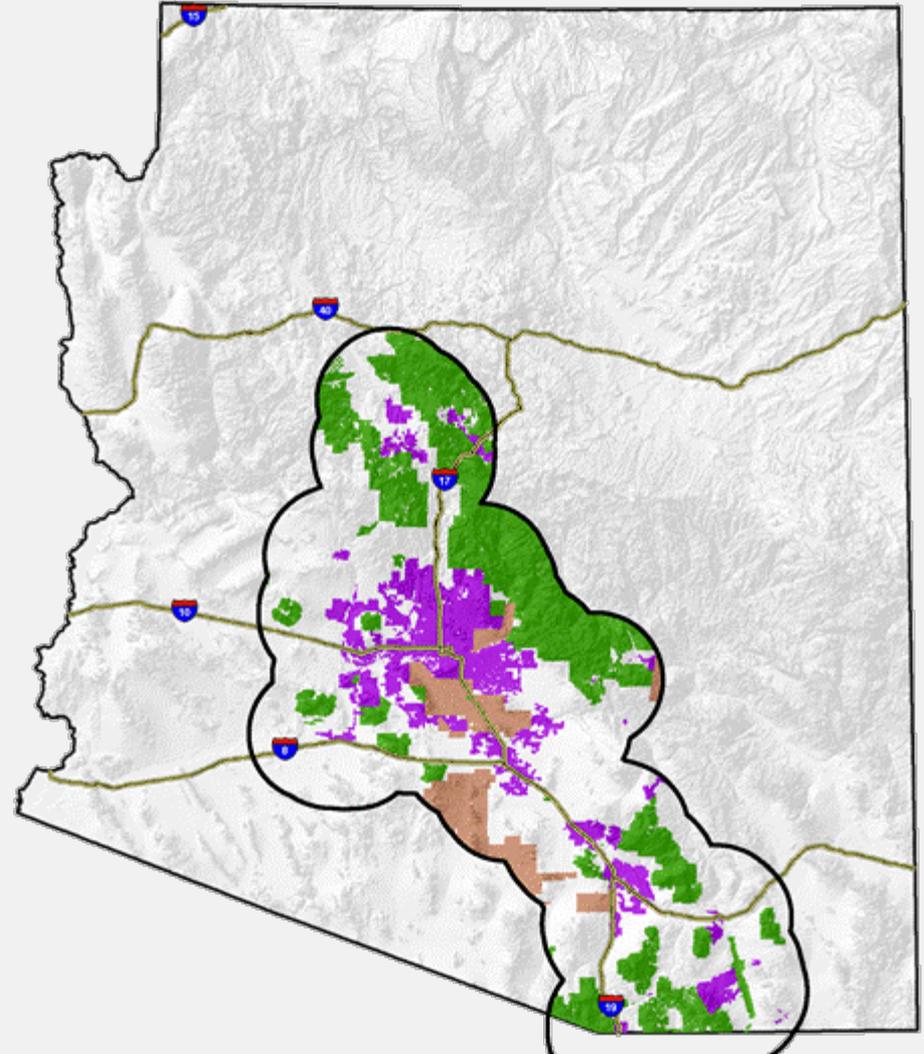
- Existing City Limits
- Tribal Lands



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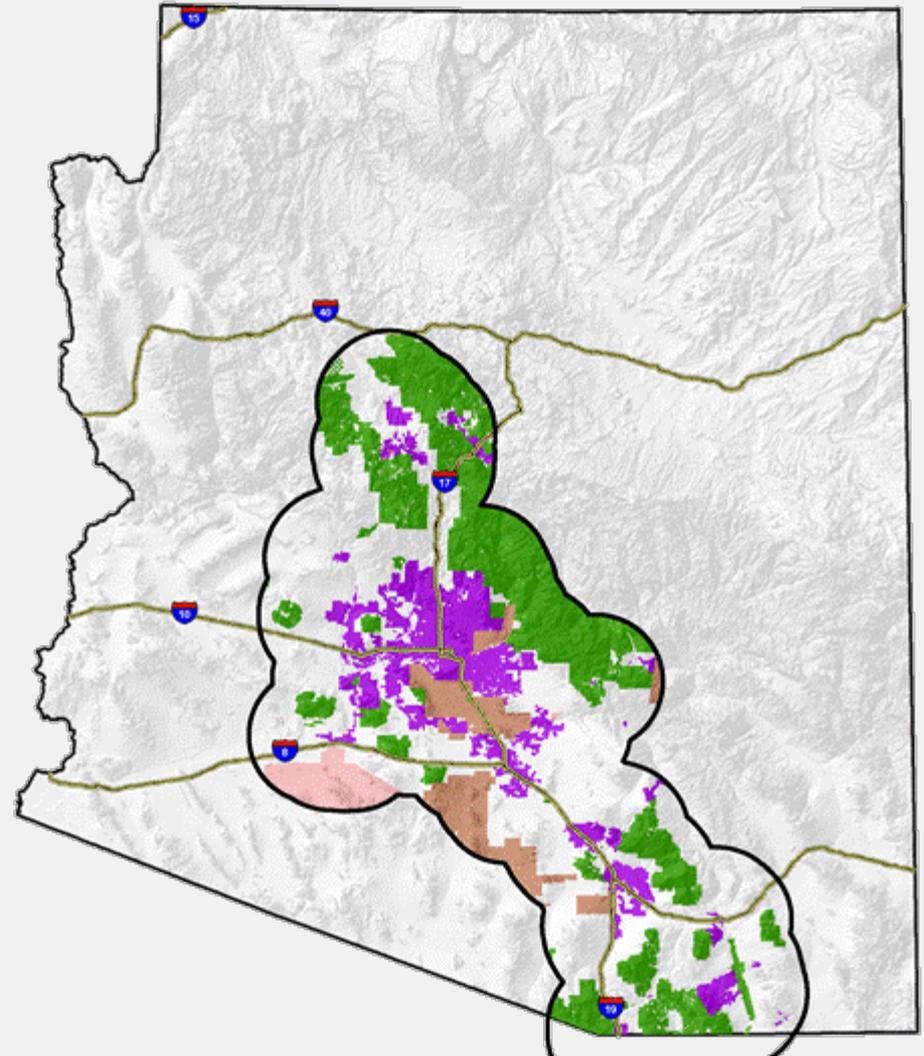
- Existing City Limits
- Tribal Lands
- National Parks, Forests & Wilderness



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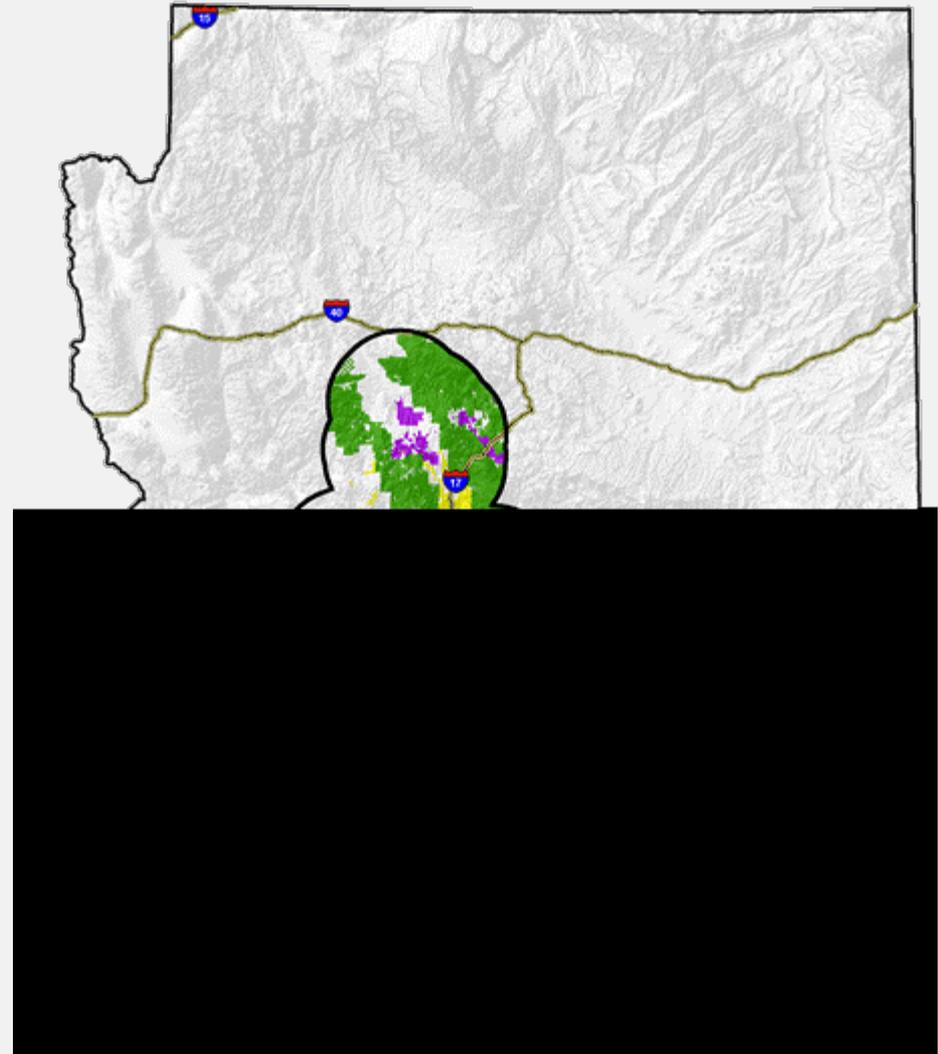
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- Military Land



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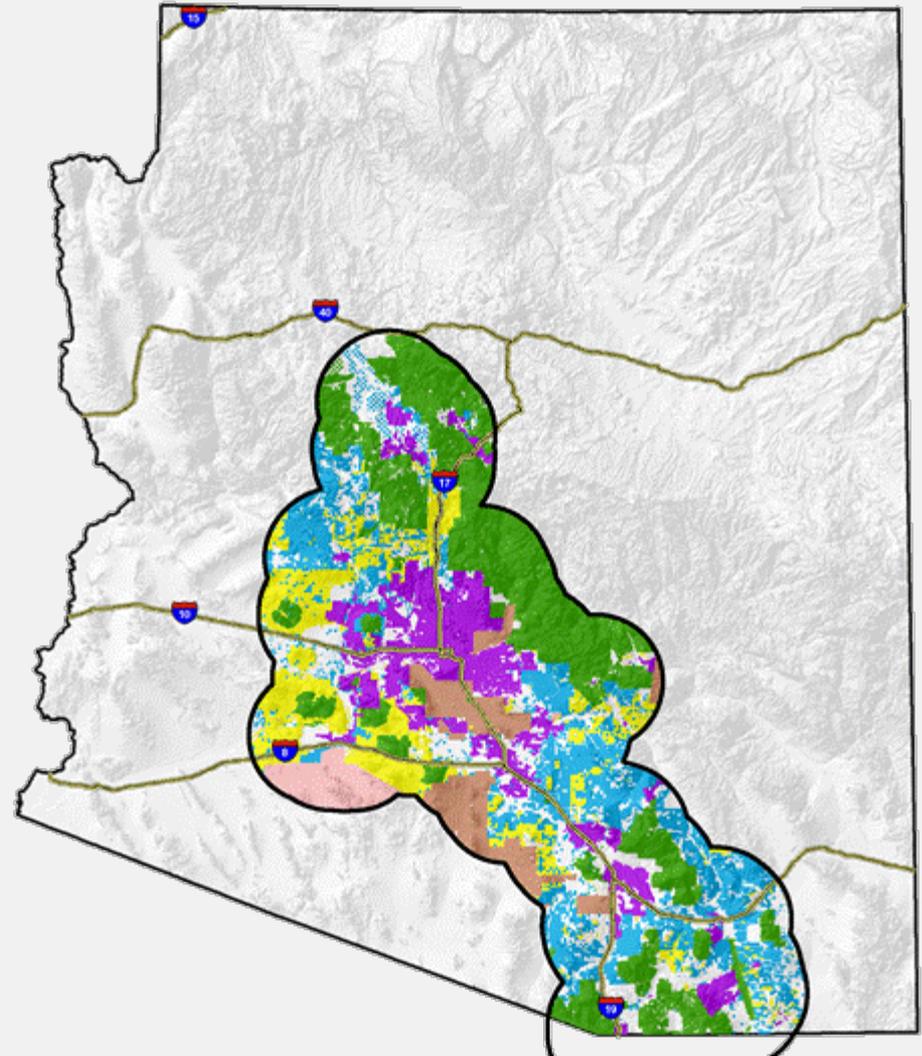
- Existing City Limits
- Tribal Lands
- National Parks, Forests & Wilderness
- Military Land
- Bureau of Land Management



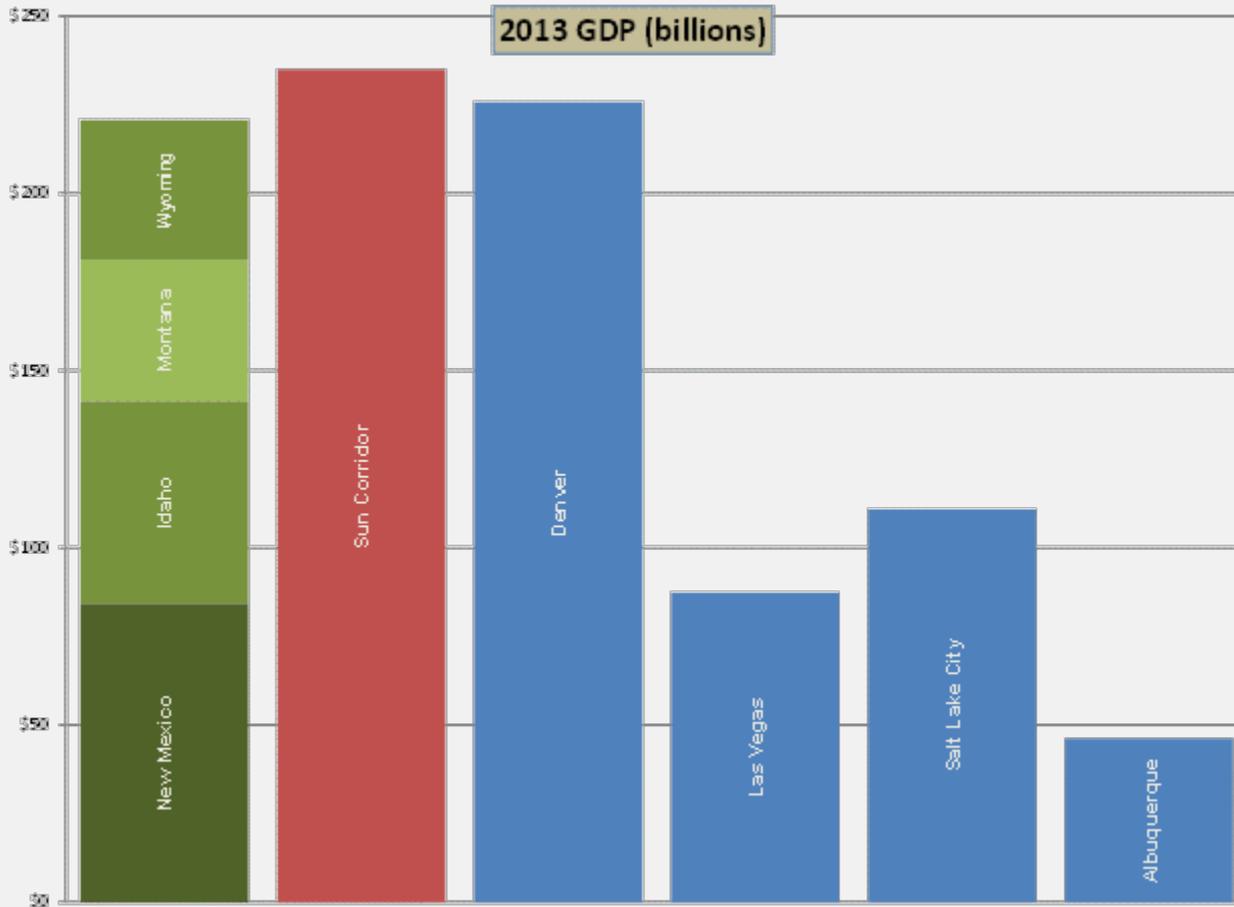
Not a Solid Mass of Development

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- Existing City Limits
- Tribal Lands
- National Parks, Forests & Wilderness
- Military Land
- Bureau of Land Management
- State Trust Land



Sun Corridor Quick Facts

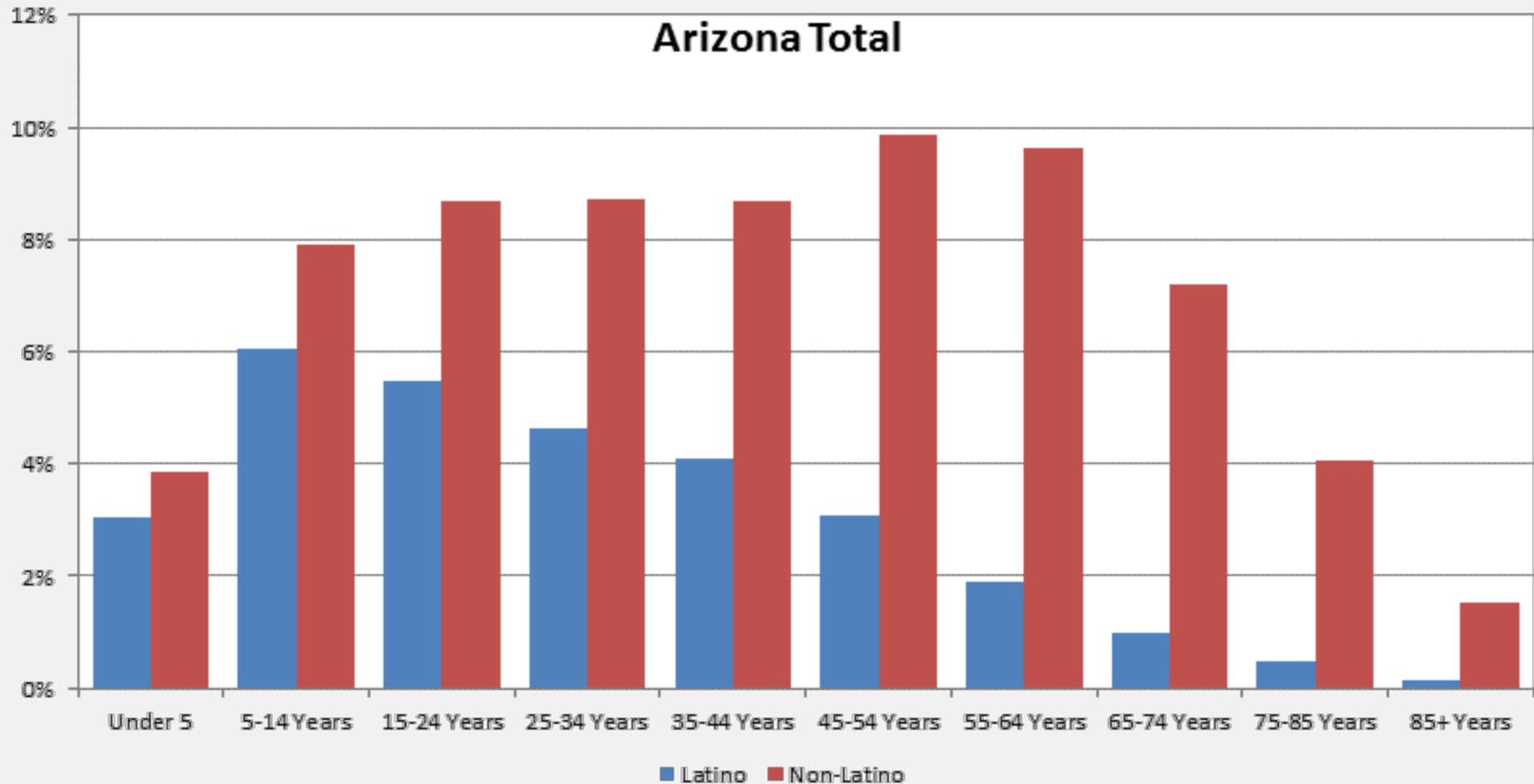


The Sun Corridor is the largest concentration of population and economic activity in the Intermountain West.

Sun Corridor Quick Facts

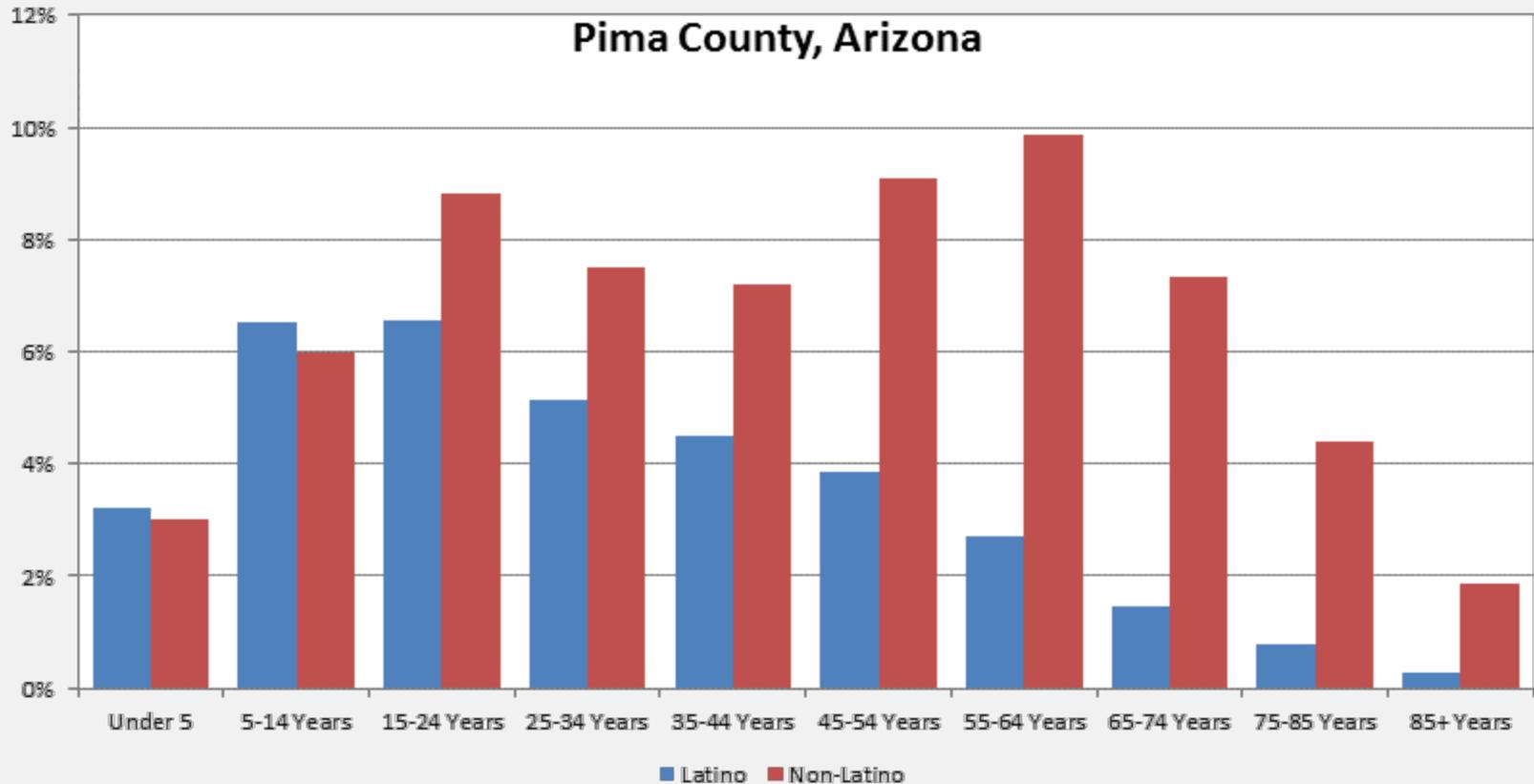
- **More than 80% of Arizona residents live in the Sun Corridor.**
- **90% of Arizona's economic activity is in the Sun Corridor**
- **100,000 – 200,000 people commute at least occasionally between Phoenix and Tucson.**
- **1 million Tucsonans drive to Phoenix annually to take a flight out of Sky Harbor. 2,700 each day.**
- **Only 23% of land within the Sun Corridor is privately owned.**

Demographics



Arizona's has two age distributions for its population: Non-Latinos skew older, while Latinos are younger.

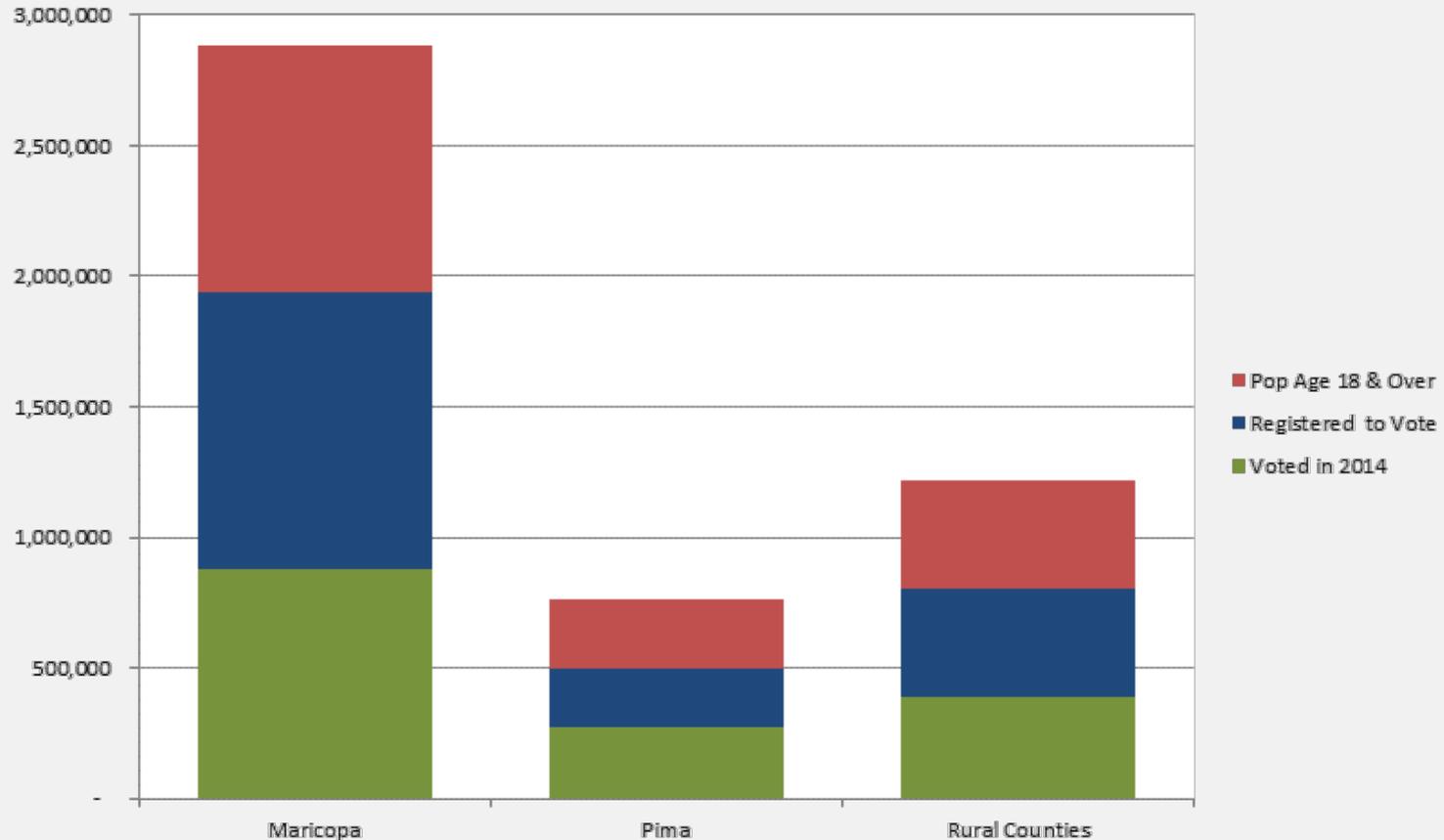
Demographics



This double-ended distribution is especially apparent in Pima County.

- *Which population needs to be the focus of policy decisions that shape our future?*
- *Which population votes to influence those policy decisions?*

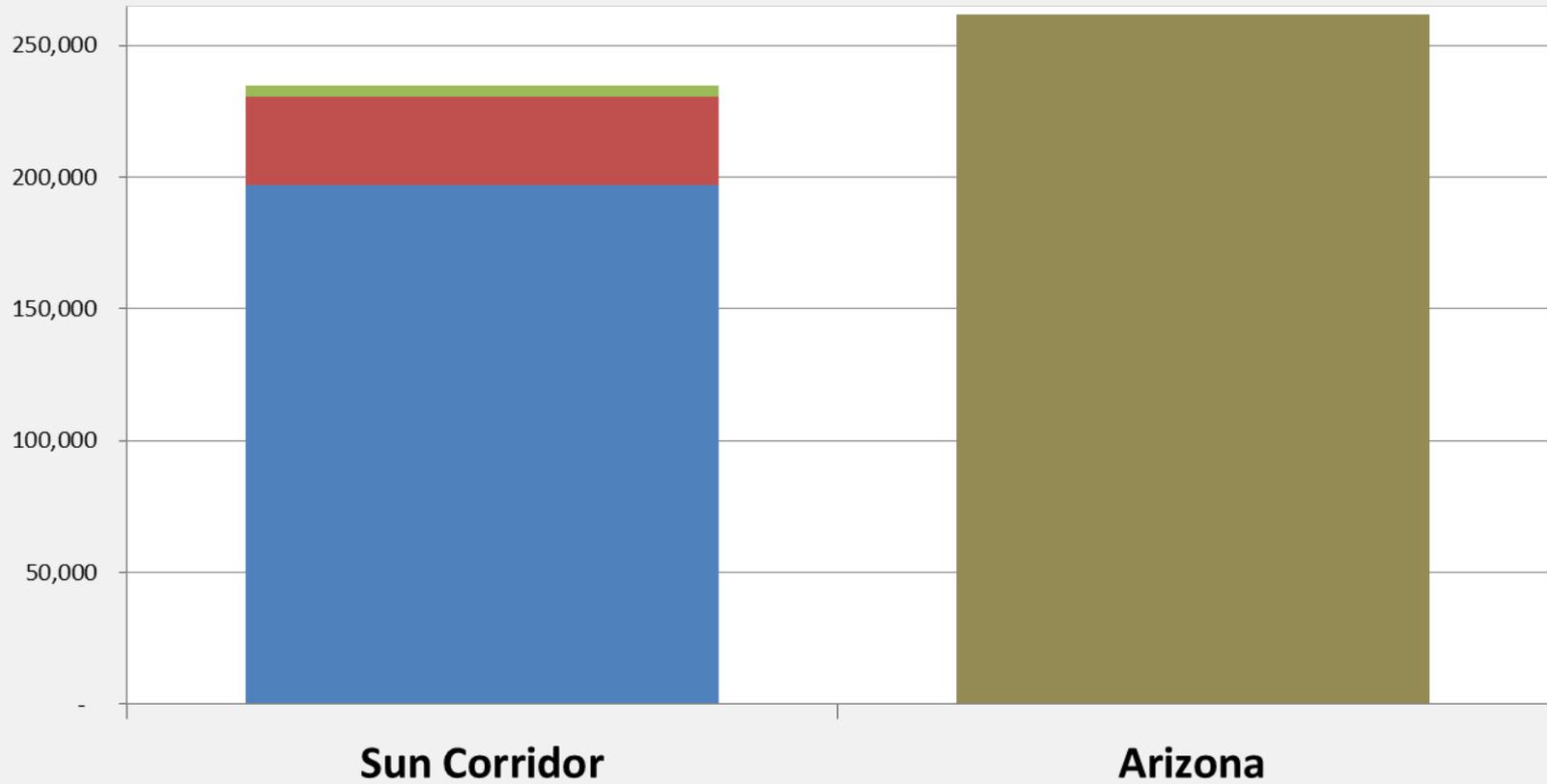
Voting



About 1/3 of the voting-age population is not registered to vote. Another 1/3 is registered, but didn't vote in 2014. Half of the remaining third, or about 16%, decide the outcome of elections.

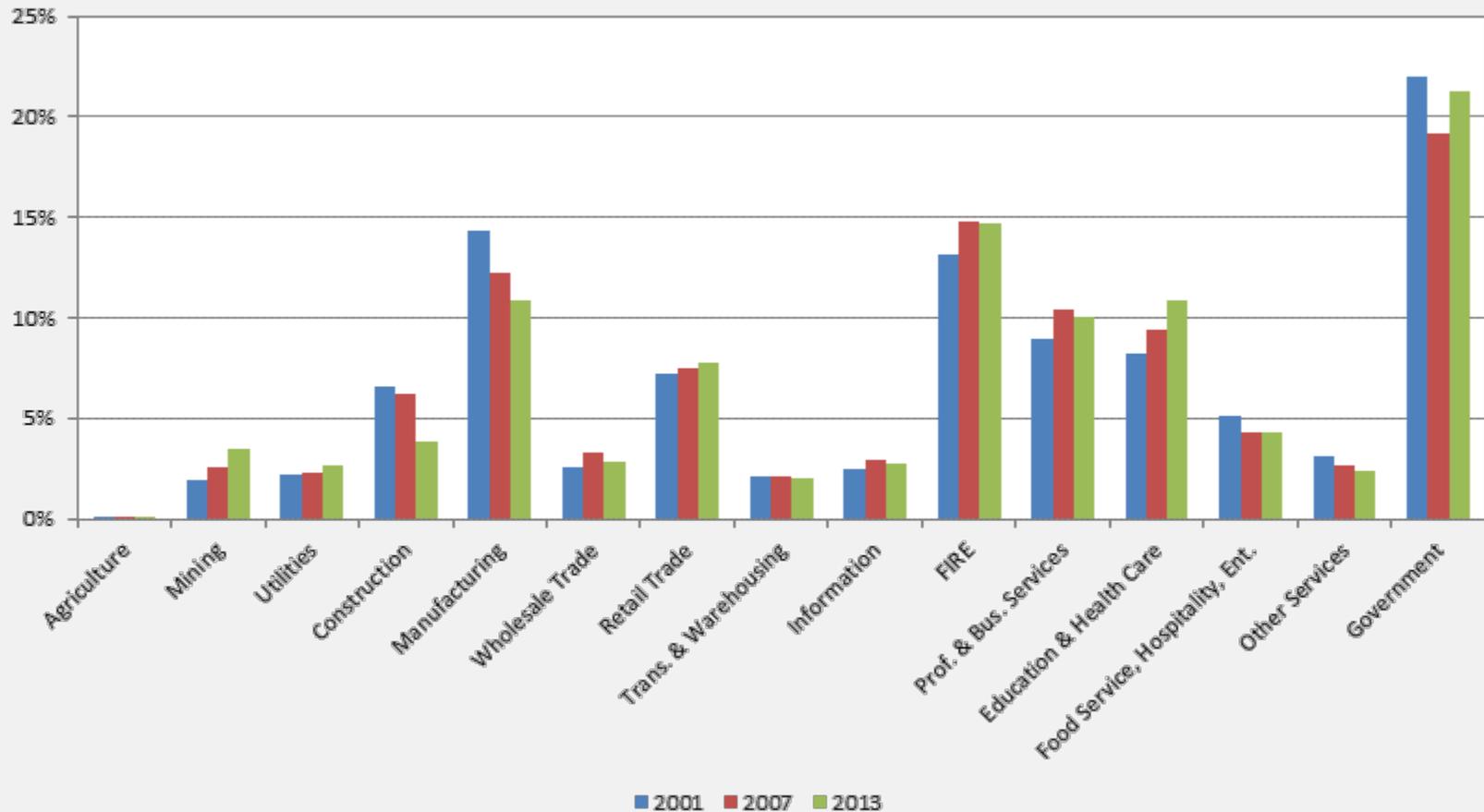
Comparative GDP

2013 GDP (Millions)



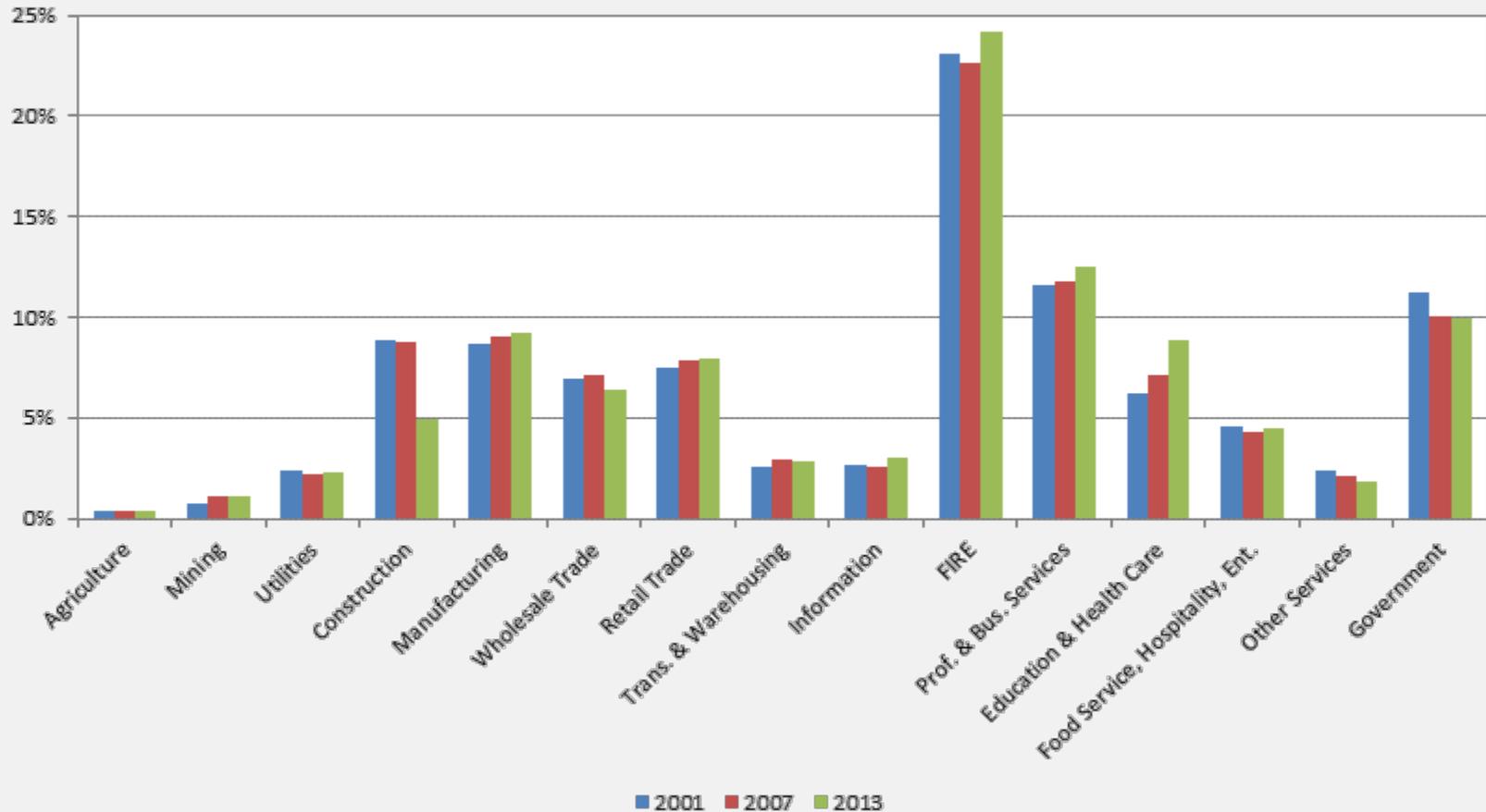
GDP Share by Industry

Tucson



GDP Share by Industry

Phoenix



Sun Corridor Quick Facts

MEGAPOLITAN AREA POPULATION, 2010, 2025, 2040 (in thousands)					
Megapolitan Area	2010	2025	2040	Change 2010-2040	Percent Change
Las Vegas	2,352	3,180	4,025	1,673 (8)	71.1 (1)
Sun Corridor	5,730	7,429	9,166	3,436 (4)	60.0 (2)
Dallas-Fort Worth	7,445	9,264	11,129	3,684 (2)	49.5 (3)
Front Range	4,066	5,055	6,071	2,005 (6)	49.3 (4)
Houston	6,723	8,343	10,007	3,284 (5)	48.8 (5)
Willamette	3,521	4,274	5,049	1,528 (9)	47.4 (6)
Atlanta	7,792	9,605	11,470	3,677 (3)	47.2 (7)
Puget Sound	4,472	5,363	6,283	1,811 (7)	40.5 (8)
Southern California	22,469	26,217	30,105	7,636 (1)	34.0 (9)
Steel Corridor	6,831	6,895	6,994	163	2.4

Minority Population Change

White and Minority Share of Population Change, 2010-2040 (in thousands)

Megapolitan Area	Population Change	White Non-Hispanic Population Change	Minority Population Change	Minority Share of Growth
Puget Sound	1,811	127	1,685 (6)	97.0 (3)
Willamette	1,389	208	1,181 (8)	85.0 (4)
Southern California	7,636	(2,358)	9,994 (1)	130.9 (1)
Las Vegas	1,673	541	1,132 (9)	67.7 (9)
Sun Corridor	3,436	845	2,591 (5)	75.4 (7)
Front Range	2,021	516	1,505 (7)	74.5 (8)
Dallas-Fort Worth	3,684	827	2,857 (3)	77.6 (6)
Houston	3,284	(64)	3,348 (2)	102.0 (2)
Atlanta	3,679	963	2,716 (4)	77.8 (5)
Steel Corridor	163	(438)	601	368.1
New York-Philadelphia	6,053	(3,376)	9,430	155.8

Source: Megapolitan America, 2011

Senior Population Change

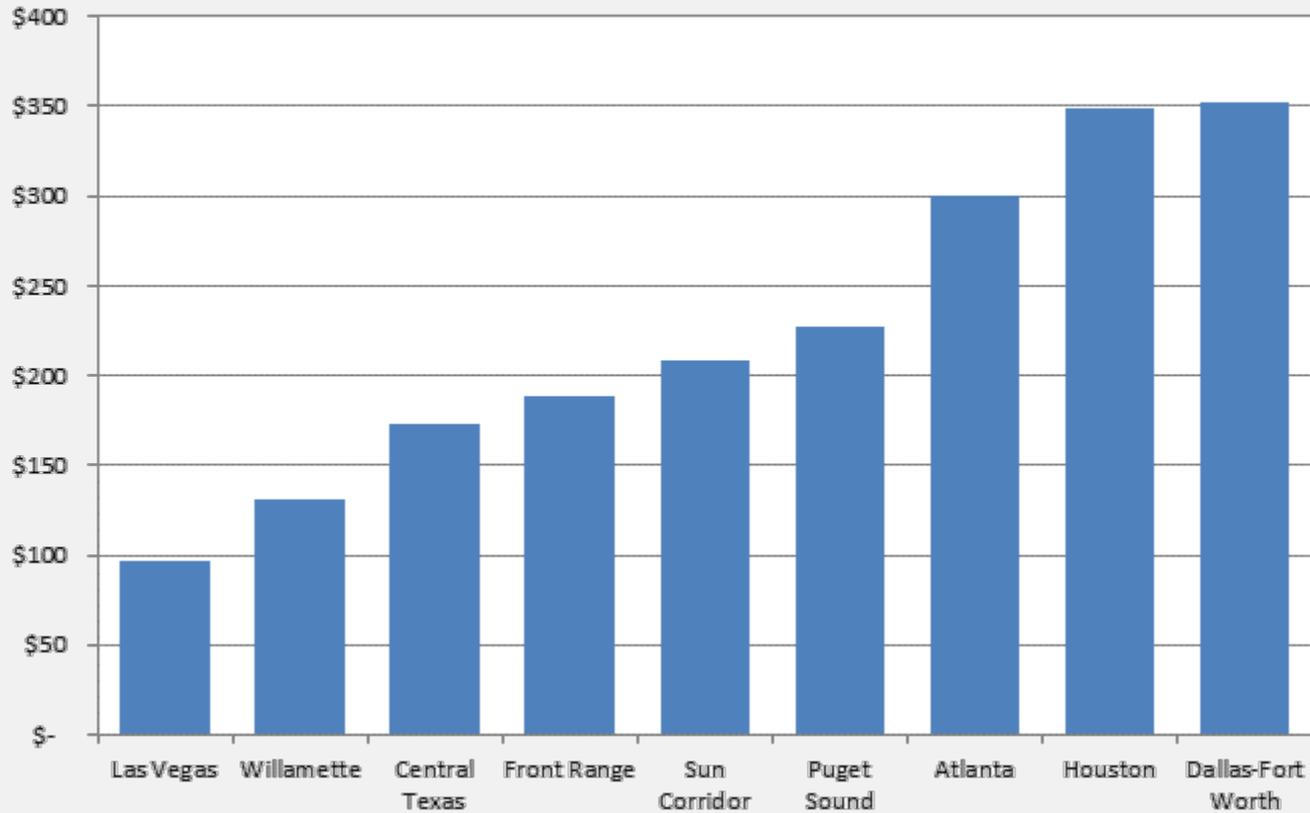
Megapolitan Area Senior Population Change, 2010-2040 (in thousands)

Megapolitan Area	Total Population Change 2010-2040 (N)	Senior Population Change 2010-2040 (N)	Seniors as Share of Population Change 2010-2040 (%)
Puget Sound	1,811	710 (6)	39.2 (2)
Willamette	1,389	448 (9)	32.3 (4)
Southern California	7,636	3,558 (1)	46.6 (1)
Las Vegas	1,673	557 (7)	37.3 (3)
Sun Corridor	3,436	1,090 (4)	31.7 (5)
Front Range	2,021	546 (8)	27.0 (9)
Dallas-Fort Worth	3,684	1,094 (3)	29.7 (8)
Houston	3,284	998 (5)	30.4 (7)
Atlanta	3,679	1,143 (2)	31.1 (6)
Steel Corridor	163	703	430.6
New England	1,675	1,151	68.8

Source: Megapolitan America, 2011

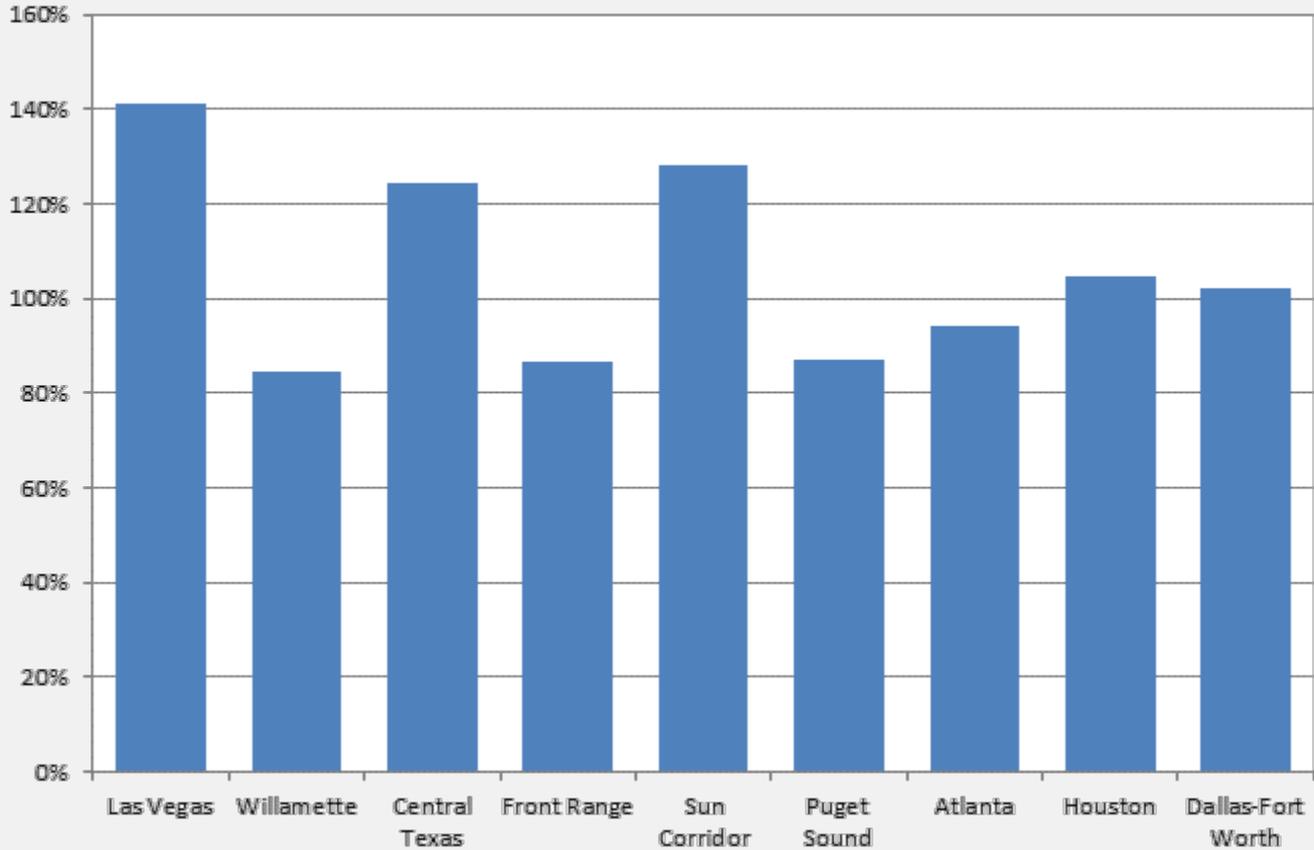
Gross Regional Product

2010 Gross Regional Product
(Billions)



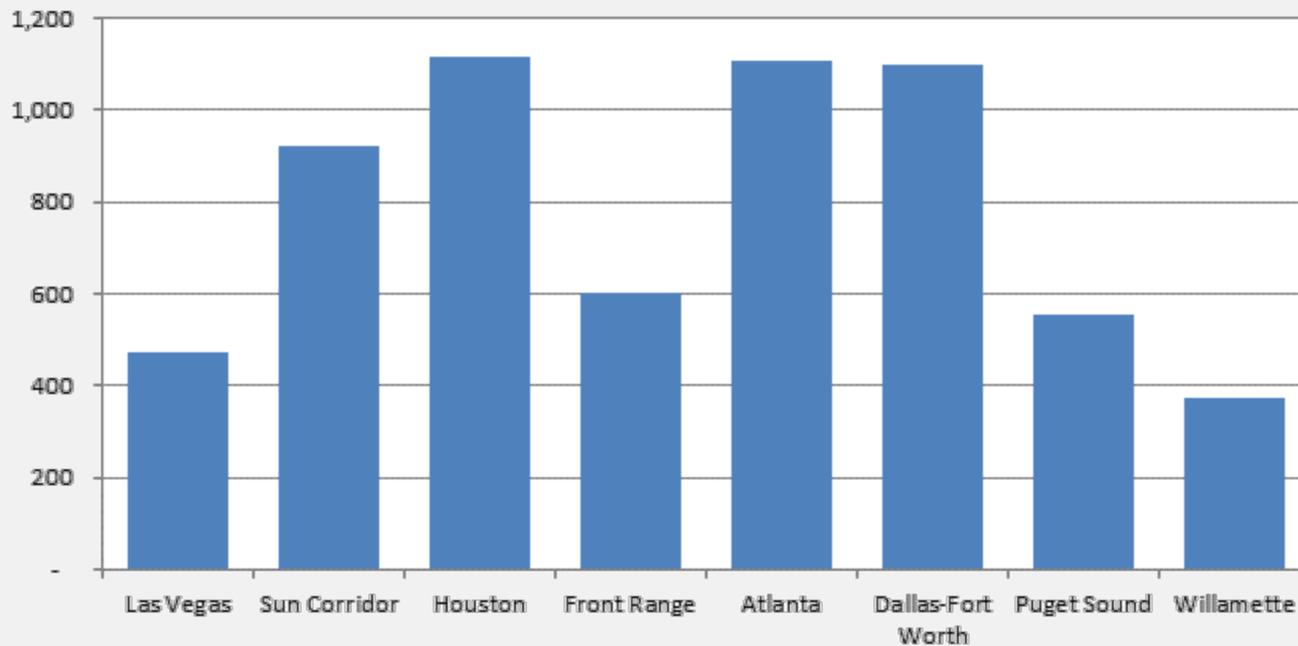
Change to Gross Regional Product

Projected Change in GRP: 2010-2040



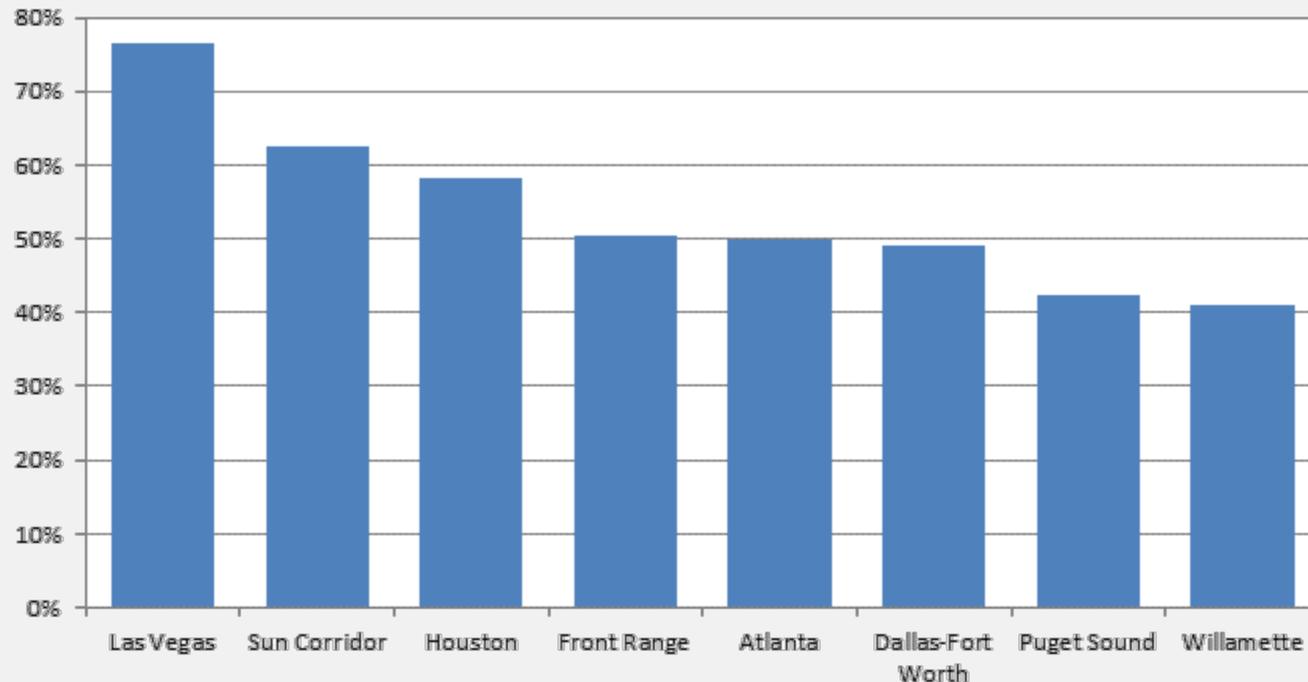
Demand for Non-Residential Space

Change in Non-Residential Space: 2010-2040
(Millions of Square Feet)

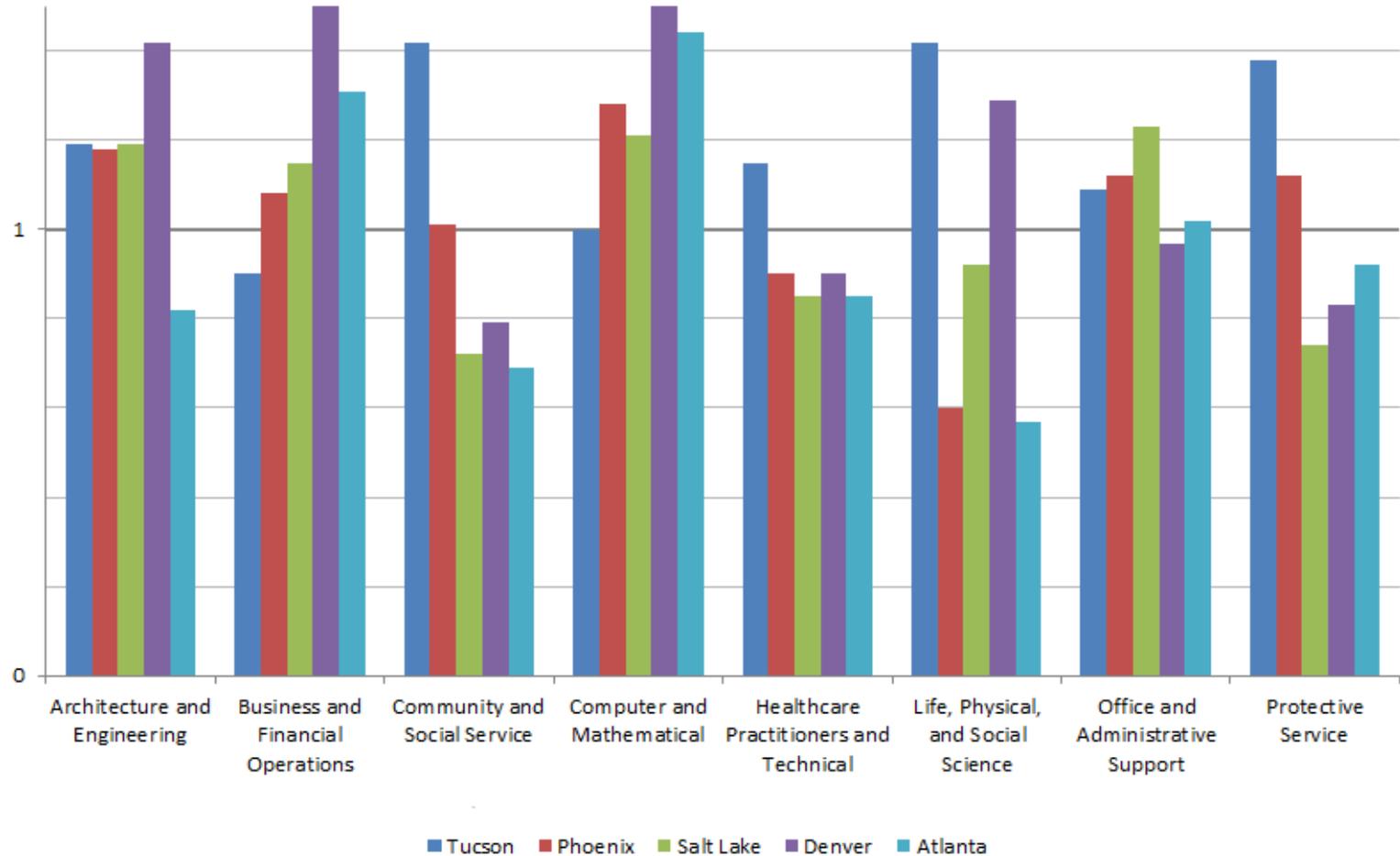


Demand for Non-Residential Space

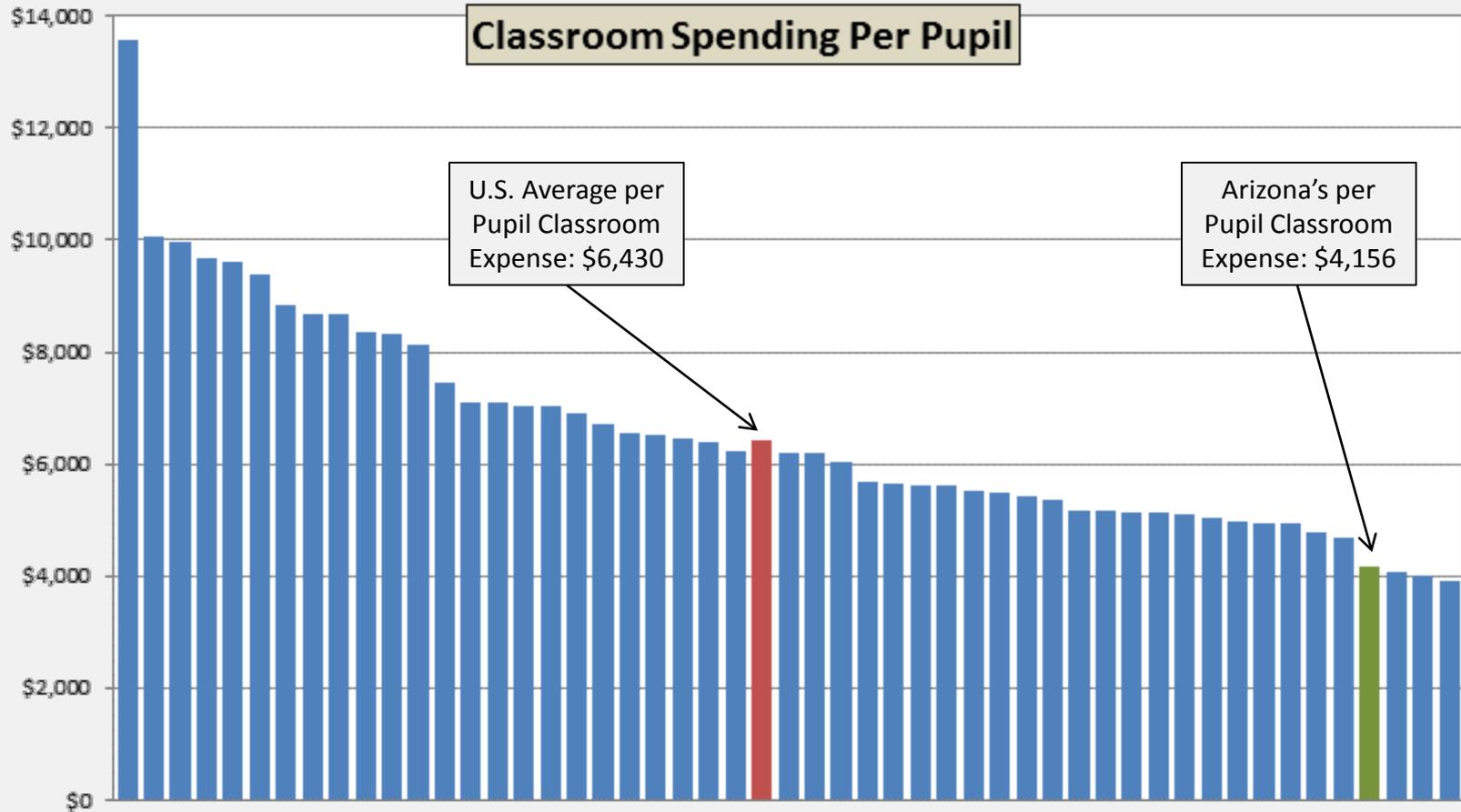
Percent Change in Non-Residential Space: 2010-2040



Location Quotients for Selected Industries

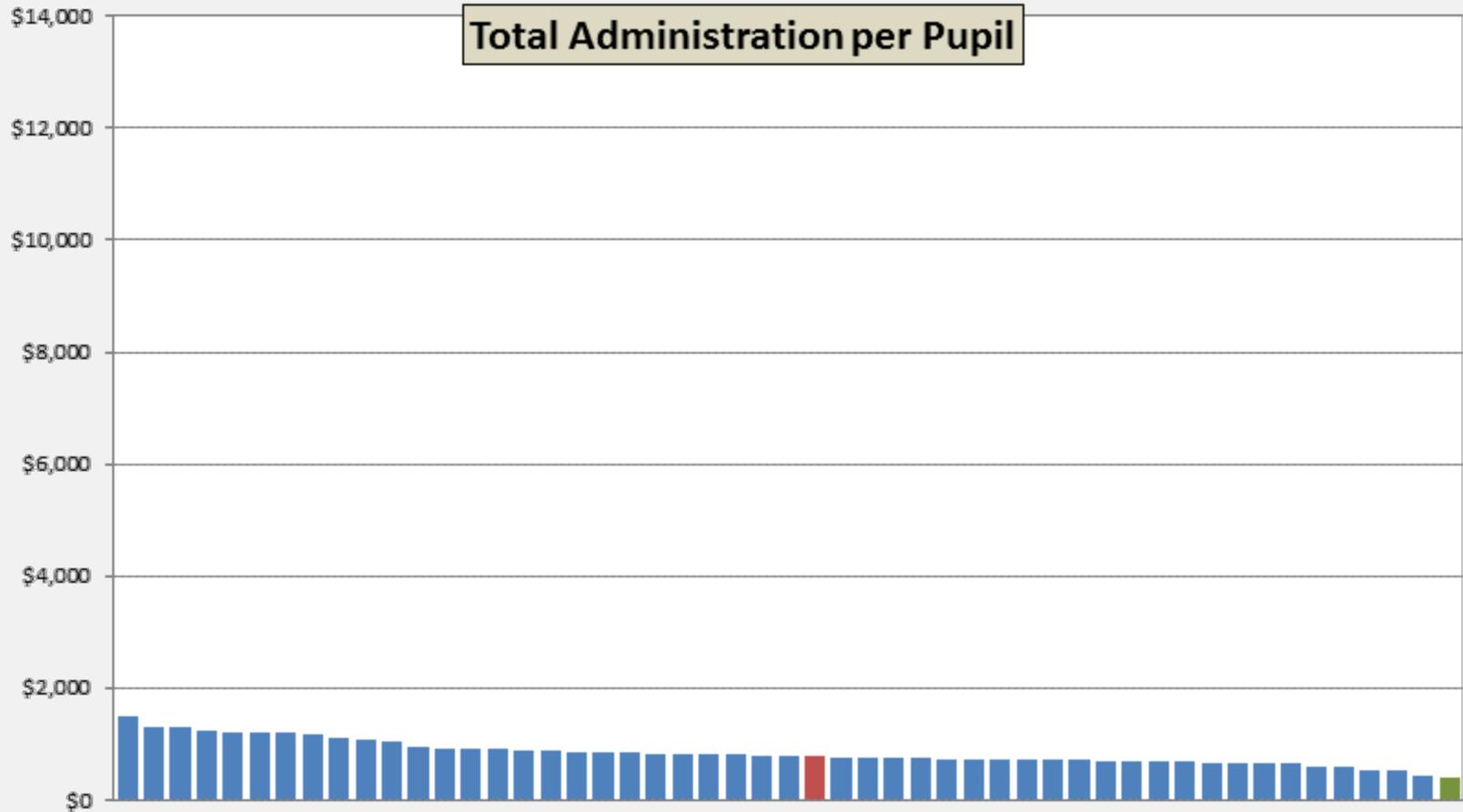


K-12 Funding



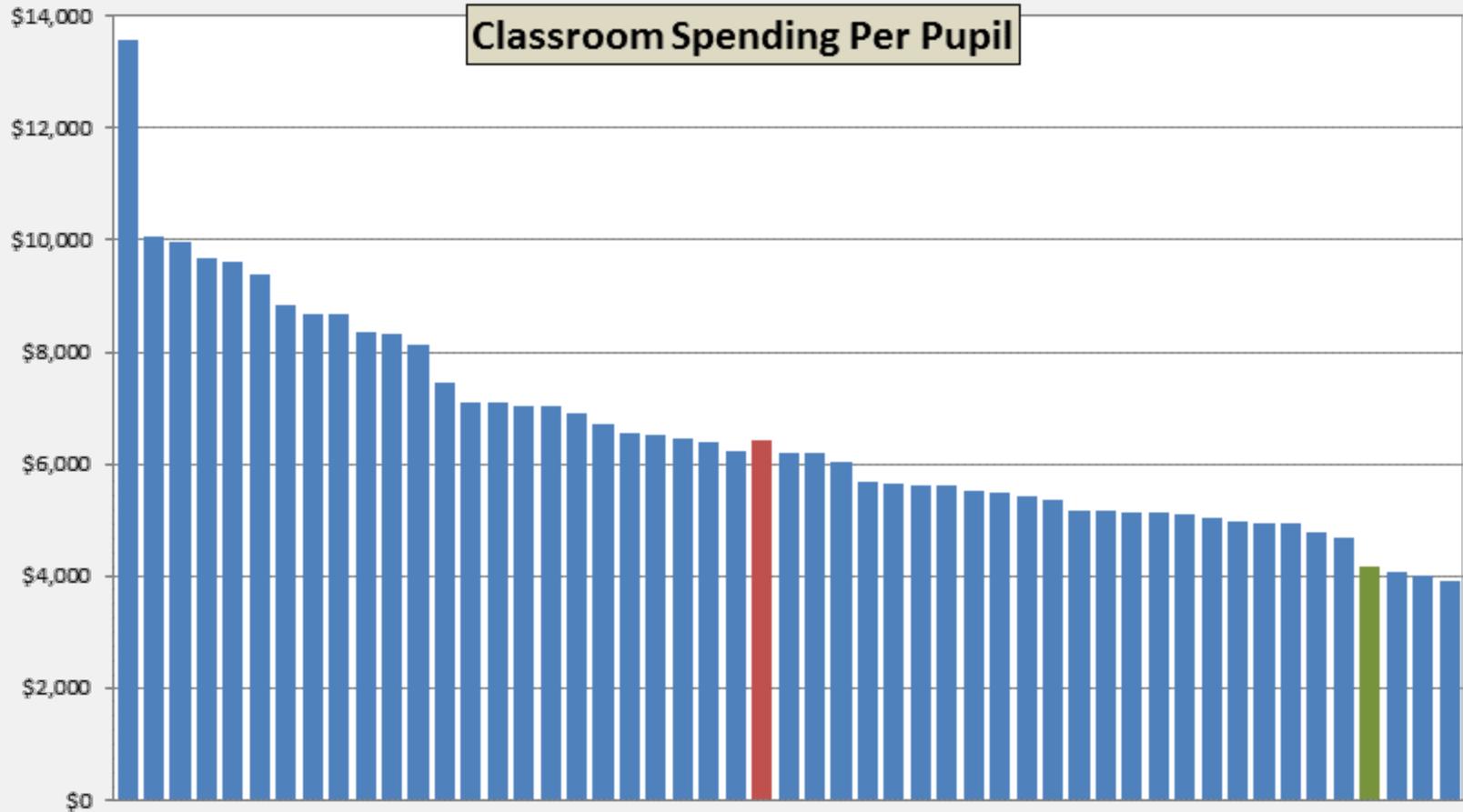
Arizona has been near the bottom when it comes to K-12 spending for years. The governor has suggested that we can improve our position by moving money from administration to the classroom.

K-12 Funding

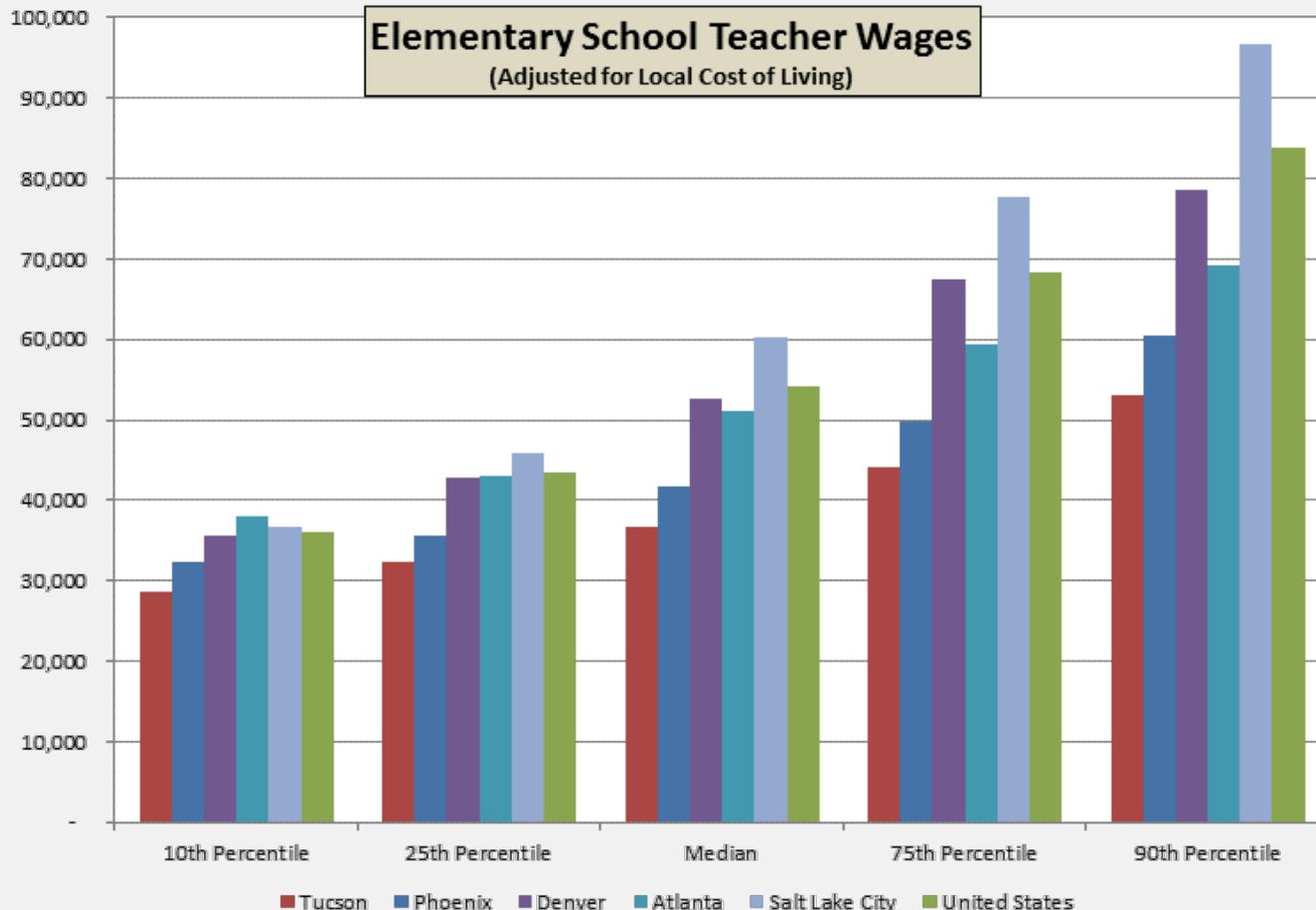


Arizona is 47th among the states when it comes to per-pupil classroom spending, but 50th for administration spending.

K-12 Funding



Teacher Salaries



80% of all K-12 spending goes to salaries and benefits, so low education funding means low-pay for teachers. Phoenix and Tucson teachers are paid substantially less than those in competitor cities, even when controlled for cost of living.

The Megapolitan Concept

