

Regional Land Use Analysis

Maricopa Association of Governments

Presented by: Kurt Cotner

April, 2013

MAG Land Use Data - Overview

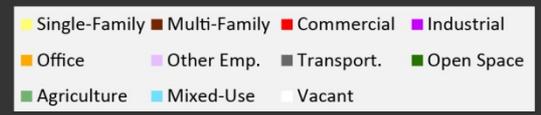
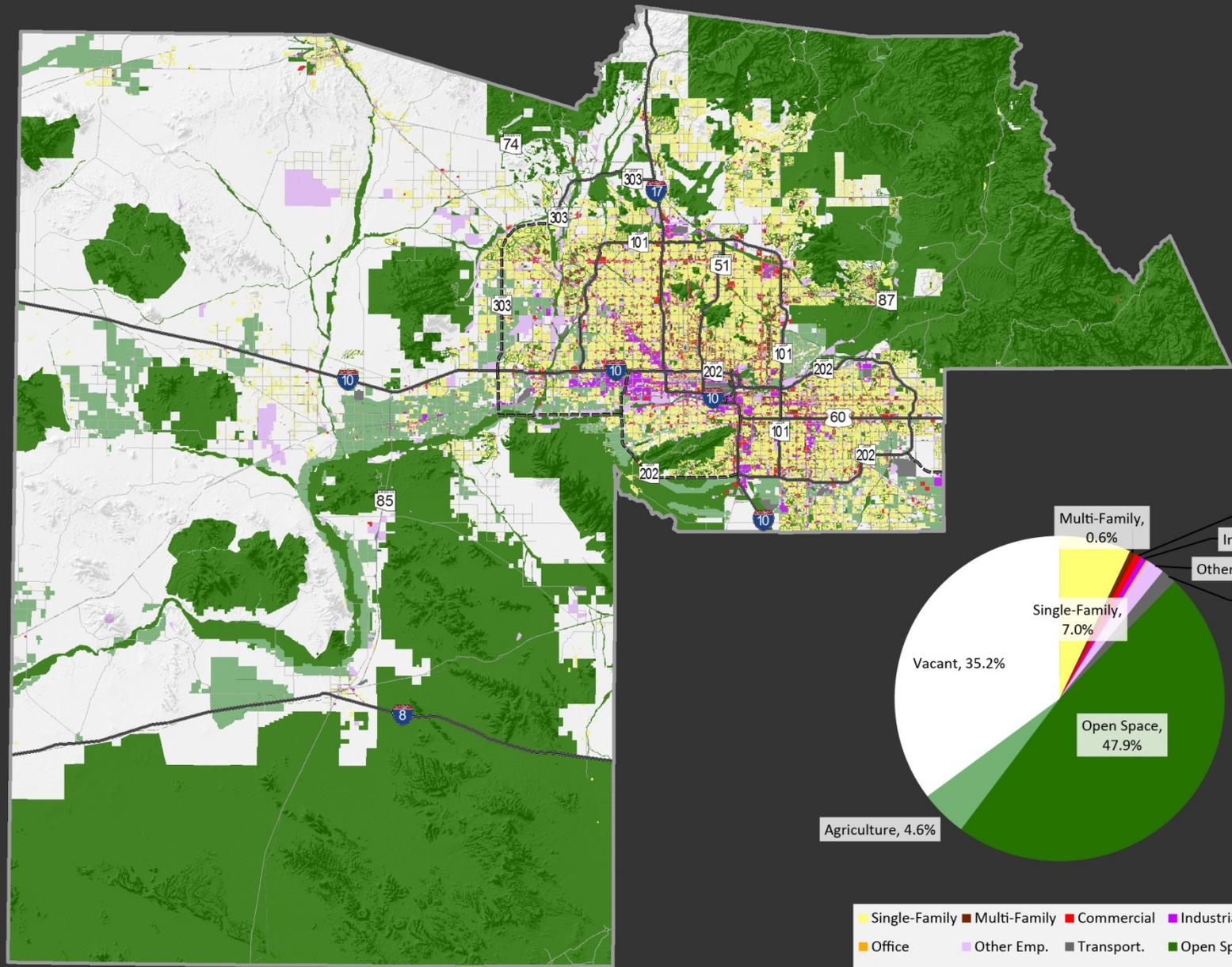
- 2012 Land Use datasets:
 - Existing Land Use
 - Future Land Use
 - Developments
 - General Plan
- Data sources:
 - Maricopa County Assessor
 - Arizona State Land Department
 - MAG Member Agencies
- Used in:
 - MAG Socioeconomic Model
 - Analysis of development and land use patterns

Existing Land Use, 2012

- Built from Maricopa County Assessor's parcels
 - Parcel Land use derived initially from Assessor's Property Use Codes
 - Land Use is extensively verified by MAG staff
 - Parcels are aggregated based on common land use
 - Gaps filled in and assigned appropriate land use



Existing Land Use, 2012



0 5 10 15 20 Miles

Existing Land Use, 2012

| Existing Land Use, 2012 | | | | | | | | | | | | |
|---|---------------|--------------|-------------|-------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|------|
| Maricopa County Land Use by Municipal Planning Area | | | | | | | | | | | | |
| Member Agency | Single-Family | Multi-Family | Commercial | Industrial | Office | Other Emp. | Transport. | Open Space | Agriculture | Mixed-Use | Vacant | |
| Apache Junction * | 53.8% | 23.1% | 0.0% | 0.0% | 0.0% | 0.0% | 23.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Avondale | 9.7% | 0.5% | 1.3% | 0.4% | 0.1% | 4.2% | 1.7% | 41.2% | 7.2% | 0.0% | 33.6% | |
| Buckeye | 2.8% | 0.0% | 0.2% | 0.1% | 0.0% | 1.5% | 1.5% | 35.5% | 12.0% | 0.0% | 46.3% | |
| Carefree | 50.8% | 1.7% | 1.2% | 0.1% | 0.5% | 0.7% | 3.1% | 11.3% | 0.0% | 0.0% | 30.6% | |
| Cave Creek | 21.1% | 0.2% | 1.0% | 0.0% | 0.0% | 0.3% | 0.3% | 37.9% | 0.0% | 0.0% | 39.2% | |
| Chandler | 46.8% | 3.8% | 4.9% | 6.2% | 1.2% | 5.7% | 8.3% | 7.7% | 6.5% | 0.0% | 9.1% | |
| El Mirage | 32.3% | 0.5% | 1.5% | 4.7% | 0.0% | 13.1% | 5.7% | 12.9% | 21.1% | 0.0% | 8.1% | |
| Fort McDowell Yavapai Nation | 5.4% | 0.0% | 0.4% | 0.0% | 0.0% | 2.1% | 0.3% | 82.0% | 9.7% | 0.0% | 0.1% | |
| Fountain Hills | 34.3% | 5.6% | 1.4% | 0.4% | 0.5% | 2.3% | 2.4% | 32.8% | 0.0% | 0.0% | 20.3% | |
| Gila Bend | 1.0% | 0.0% | 0.1% | 0.1% | 0.0% | 1.0% | 2.1% | 22.8% | 29.5% | 0.0% | 43.3% | |
| Gila River Indian Community * | 1.2% | 0.0% | 0.5% | 0.4% | 0.0% | 0.7% | 1.5% | 65.6% | 17.3% | 0.0% | 12.7% | |
| Gilbert | 48.1% | 1.5% | 3.7% | 2.2% | 0.7% | 5.7% | 6.0% | 8.6% | 12.4% | 0.0% | 11.2% | |
| Glendale | 35.7% | 2.9% | 4.3% | 2.1% | 0.5% | 12.9% | 5.7% | 6.6% | 19.5% | 0.0% | 9.8% | |
| Goodyear | 5.6% | 0.1% | 0.5% | 0.4% | 0.1% | 1.9% | 2.6% | 32.1% | 8.6% | 0.0% | 48.2% | |
| Guadalupe | 46.9% | 5.5% | 9.3% | 2.8% | 1.0% | 7.7% | 11.0% | 6.1% | 0.0% | 0.0% | 9.8% | |
| Litchfield Park | 41.8% | 3.7% | 2.7% | 0.0% | 0.0% | 6.1% | 4.9% | 17.3% | 0.0% | 0.0% | 23.4% | |
| Mesa | 37.6% | 4.1% | 4.4% | 2.8% | 0.6% | 6.6% | 10.2% | 12.3% | 4.7% | 0.0% | 16.7% | |
| Paradise Valley | 74.9% | 0.0% | 2.4% | 0.0% | 0.0% | 3.0% | 2.1% | 11.0% | 0.0% | 0.0% | 6.6% | |
| Peoria * | 12.6% | 0.6% | 1.3% | 0.4% | 0.1% | 3.8% | 2.6% | 43.1% | 0.8% | 0.0% | 34.7% | |
| Phoenix | 28.9% | 2.9% | 3.3% | 3.5% | 0.9% | 5.9% | 4.9% | 21.4% | 2.6% | 0.0% | 25.7% | |
| Queen Creek * | 31.7% | 0.3% | 3.1% | 0.2% | 0.1% | 2.3% | 4.7% | 3.5% | 34.8% | 0.0% | 19.3% | |
| Salt River Pima-Maricopa Indian Community | 3.6% | 0.0% | 0.8% | 0.2% | 0.3% | 5.4% | 1.6% | 58.5% | 21.9% | 0.0% | 7.7% | |
| Scottsdale | 30.2% | 4.2% | 2.3% | 0.9% | 1.3% | 3.1% | 2.8% | 41.6% | 0.0% | 0.0% | 13.6% | |
| Surprise | 11.0% | 0.1% | 0.6% | 0.2% | 0.0% | 4.3% | 2.0% | 8.1% | 1.9% | 0.0% | 71.7% | |
| Tempe | 36.0% | 9.3% | 6.8% | 11.8% | 3.8% | 10.5% | 9.3% | 9.6% | 0.1% | 0.0% | 2.9% | |
| Tolleson | 10.8% | 1.1% | 2.9% | 40.0% | 0.1% | 5.9% | 10.6% | 1.1% | 15.4% | 0.0% | 12.2% | |
| Wickenburg * | 2.8% | 0.1% | 0.2% | 0.0% | 0.0% | 0.2% | 0.7% | 2.2% | 0.1% | 0.0% | 93.6% | |
| Youngtown | 31.0% | 2.7% | 3.0% | 0.6% | 0.3% | 18.3% | 2.3% | 29.9% | 0.0% | 0.0% | 11.8% | |
| Maricopa County | 7.0% | 0.6% | 0.7% | 0.5% | 0.2% | 1.8% | 1.5% | 47.9% | 4.6% | 0.0% | 35.2% | |

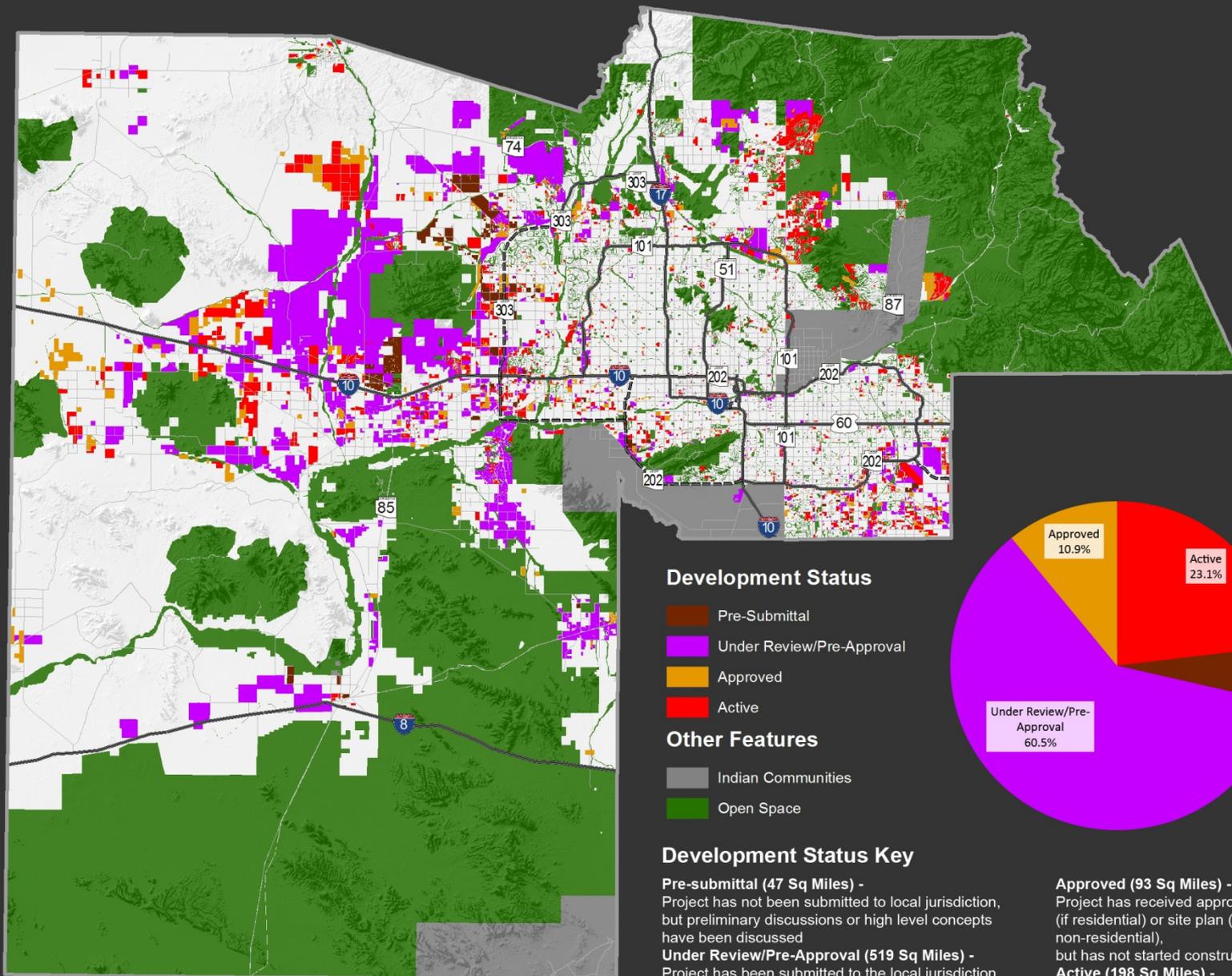
* Includes only Maricopa County portion

Sources: Maricopa County Assessor, MAG Existing Land Use 2012

Developments, 2012

- Updated based on development-related documents collected from Member Agencies, including:
 - Development Plans
 - Zoning Amendments related to proposed development activity
 - Preliminary and Final Residential Plats
 - Conceptual Site Plans, etc
- Categorized under one of the following status descriptions:
 - Pre-submittal
 - Under Review/Pre-Approval
 - Approved
 - Active
 - Built

Known Development Projects, 2012



Development Status

- Pre-Submittal
- Under Review/Pre-Approval
- Approved
- Active

Other Features

- Indian Communities
- Open Space

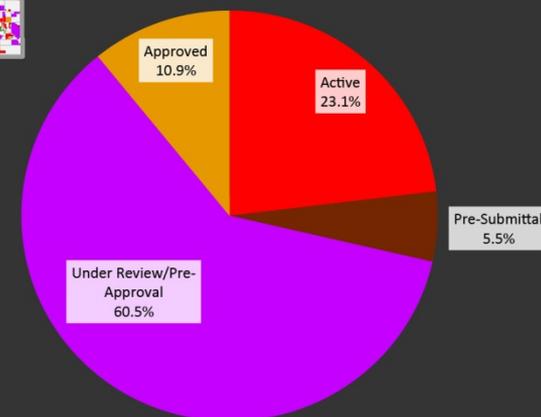
Development Status Key

Pre-submittal (47 Sq Miles) - Project has not been submitted to local jurisdiction, but preliminary discussions or high level concepts have been discussed

Under Review/Pre-Approval (519 Sq Miles) - Project has been submitted to the local jurisdiction for review, but has not received final plat or site plan approval.

Approved (93 Sq Miles) - Project has received approval of final plat (if residential) or site plan (if non-residential), but has not started construction

Active (198 Sq Miles) - Project or phase is under construction



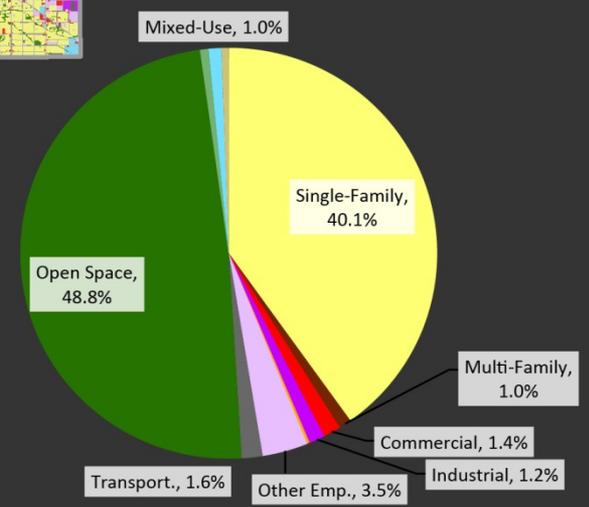
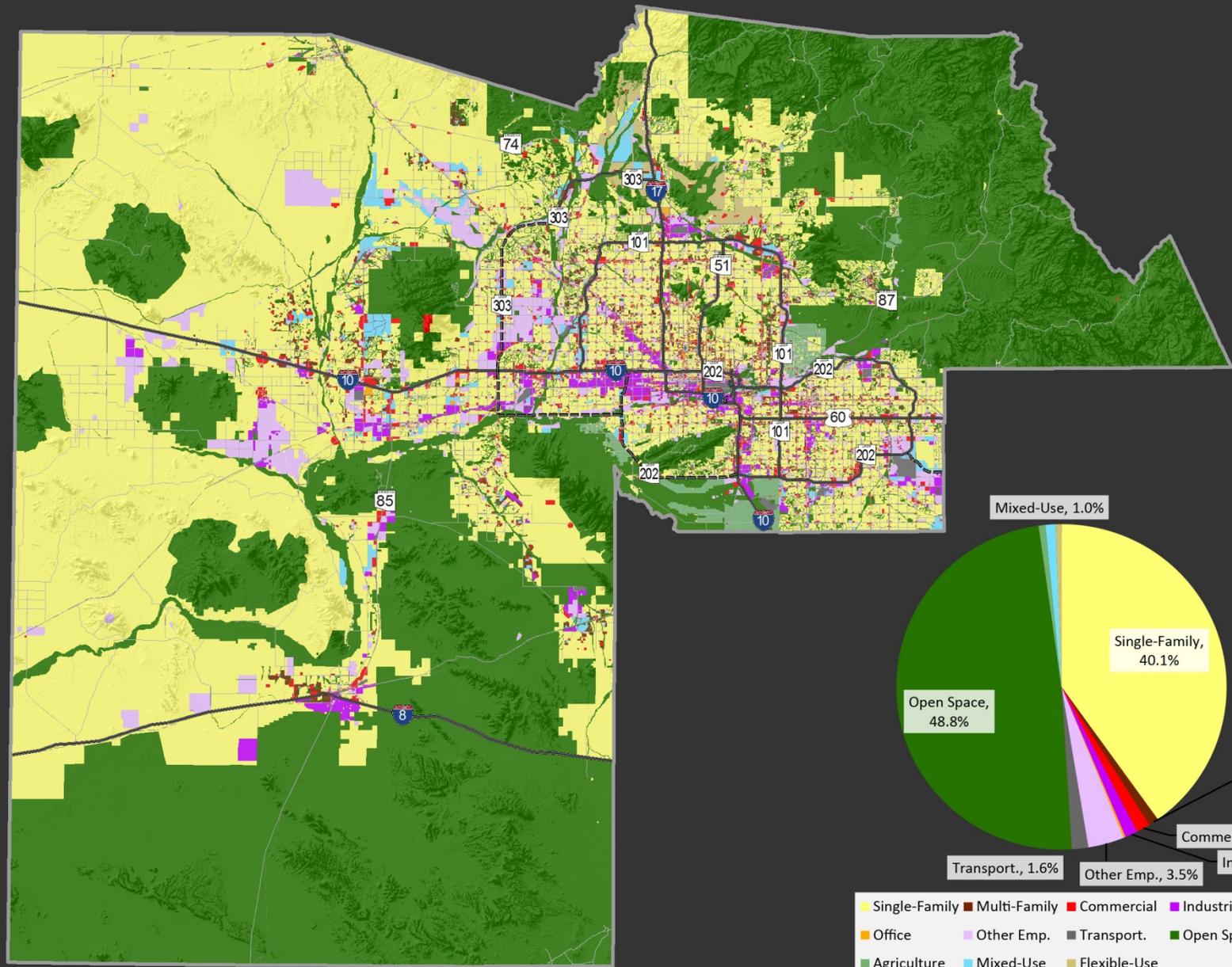
0 5 10 15 20 Miles

Future Land Use, 2012

- Future Land Use = Existing Land Use + Development Projects (including Redevelopment) + General Plan Land Use
- Represents theoretical “Build-Out” scenario in Maricopa County



Future Land Use, 2012



0 5 10 15 20 Miles

Future Land Use, 2012

| Future Land Use, 2012 | | | | | | | | | | | |
|---|---------------|--------------|-------------|-------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|
| Maricopa County Land Use by Municipal Planning Area | | | | | | | | | | | |
| Member Agency | Single-Family | Multi-Family | Commercial | Industrial | Office | Other Emp. | Transport. | Open Space | Agriculture | Mixed-Use | Flexible-Use |
| Apache Junction * | 53.8% | 23.1% | 0.0% | 0.0% | 0.0% | 0.0% | 23.1% | 0.0% | 0.0% | 0.0% | 0.0% |
| Avondale | 44.1% | 1.1% | 3.5% | 1.0% | 0.4% | 5.1% | 1.8% | 41.4% | 0.0% | 1.6% | 0.0% |
| Buckeye | 42.7% | 1.1% | 3.4% | 2.1% | 0.4% | 5.1% | 2.0% | 38.0% | 0.0% | 5.1% | 0.0% |
| Carefree | 80.3% | 2.0% | 1.7% | 0.1% | 0.5% | 0.7% | 3.1% | 11.4% | 0.0% | 0.2% | 0.0% |
| Cave Creek | 57.2% | 0.2% | 1.7% | 0.0% | 0.0% | 0.3% | 0.3% | 39.3% | 0.0% | 1.0% | 0.0% |
| Chandler | 52.5% | 4.6% | 6.4% | 7.0% | 1.7% | 6.8% | 8.4% | 8.9% | 0.0% | 3.9% | 0.0% |
| El Mirage | 35.0% | 0.5% | 2.7% | 4.9% | 0.0% | 35.1% | 5.7% | 12.9% | 0.0% | 3.1% | 0.0% |
| Fort McDowell Yavapai Nation | 6.3% | 0.0% | 0.4% | 0.0% | 0.0% | 2.1% | 0.3% | 84.7% | 6.2% | 0.0% | 0.0% |
| Fountain Hills | 53.3% | 6.0% | 1.8% | 0.4% | 0.5% | 2.3% | 2.5% | 33.0% | 0.0% | 0.4% | 0.0% |
| Gila Bend | 58.2% | 2.2% | 2.1% | 5.1% | 0.0% | 4.7% | 2.1% | 25.6% | 0.0% | 0.0% | 0.0% |
| Gila River Indian Community * | 1.2% | 0.0% | 0.7% | 1.3% | 0.0% | 1.3% | 1.6% | 66.8% | 27.1% | 0.0% | 0.0% |
| Gilbert | 61.2% | 2.5% | 7.1% | 3.3% | 1.0% | 9.0% | 6.1% | 9.4% | 0.0% | 0.3% | 0.0% |
| Glendale | 44.3% | 3.7% | 5.6% | 3.1% | 1.1% | 24.4% | 5.8% | 6.9% | 0.0% | 5.2% | 0.0% |
| Goodyear | 43.8% | 3.3% | 3.0% | 4.9% | 0.2% | 5.0% | 3.3% | 35.3% | 0.0% | 1.2% | 0.0% |
| Guadalupe | 53.0% | 6.1% | 10.0% | 2.8% | 0.6% | 8.7% | 11.0% | 7.9% | 0.0% | 0.0% | 0.0% |
| Litchfield Park | 46.7% | 5.9% | 6.8% | 0.0% | 0.0% | 17.7% | 5.0% | 17.8% | 0.0% | 0.0% | 0.0% |
| Mesa | 45.0% | 4.5% | 6.0% | 4.6% | 0.8% | 12.9% | 10.4% | 12.6% | 0.0% | 3.3% | 0.0% |
| Paradise Valley | 80.1% | 0.0% | 3.6% | 0.0% | 0.0% | 3.0% | 2.1% | 10.7% | 0.0% | 0.5% | 0.1% |
| Peoria * | 37.8% | 1.8% | 2.6% | 0.6% | 0.1% | 6.9% | 2.8% | 46.1% | 0.0% | 1.3% | 0.0% |
| Phoenix | 42.5% | 3.6% | 4.4% | 4.2% | 1.0% | 7.0% | 5.0% | 22.0% | 0.0% | 2.7% | 7.6% |
| Queen Creek * | 62.9% | 0.3% | 5.8% | 3.9% | 0.4% | 9.7% | 4.8% | 5.7% | 0.2% | 6.3% | 0.0% |
| Salt River Pima-Maricopa Indian Community | 5.5% | 0.1% | 1.0% | 0.2% | 0.4% | 10.8% | 1.6% | 60.0% | 20.2% | 0.3% | 0.0% |
| Scottsdale | 40.9% | 4.3% | 2.8% | 1.2% | 1.3% | 3.2% | 2.9% | 42.2% | 0.0% | 1.1% | 0.0% |
| Surprise | 69.4% | 1.5% | 2.3% | 0.4% | 0.1% | 9.9% | 2.1% | 10.5% | 0.1% | 3.9% | 0.0% |
| Tempe | 36.2% | 9.7% | 7.0% | 11.2% | 3.8% | 10.8% | 9.5% | 9.0% | 0.0% | 2.8% | 0.0% |
| Tolleson | 12.6% | 1.1% | 9.3% | 54.1% | 0.1% | 8.2% | 10.7% | 1.1% | 0.0% | 2.8% | 0.0% |
| Wickenburg * | 96.1% | 0.1% | 0.4% | 0.0% | 0.0% | 0.3% | 0.7% | 2.4% | 0.0% | 0.0% | 0.0% |
| Youngtown | 33.4% | 2.7% | 4.7% | 0.6% | 0.3% | 25.3% | 2.3% | 30.2% | 0.0% | 0.5% | 0.0% |
| Maricopa County | 40.1% | 1.0% | 1.4% | 1.2% | 0.2% | 3.5% | 1.6% | 48.8% | 0.7% | 1.0% | 0.5% |

* Includes only Maricopa County portion

Sources: MAG Member Agencies, MAG Existing Land Use 2012, MAG Developments 2012, MAG General Plan 2012

Developable Land

- 60% of Maricopa County: Developed or “Non-Developable”
- “Developable Land” consists of Vacant or Agricultural uses

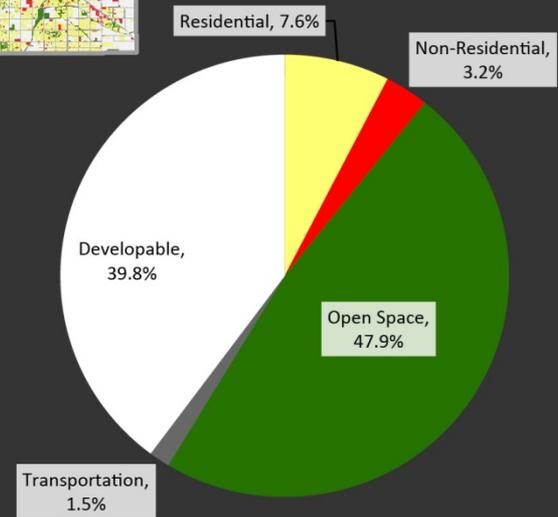
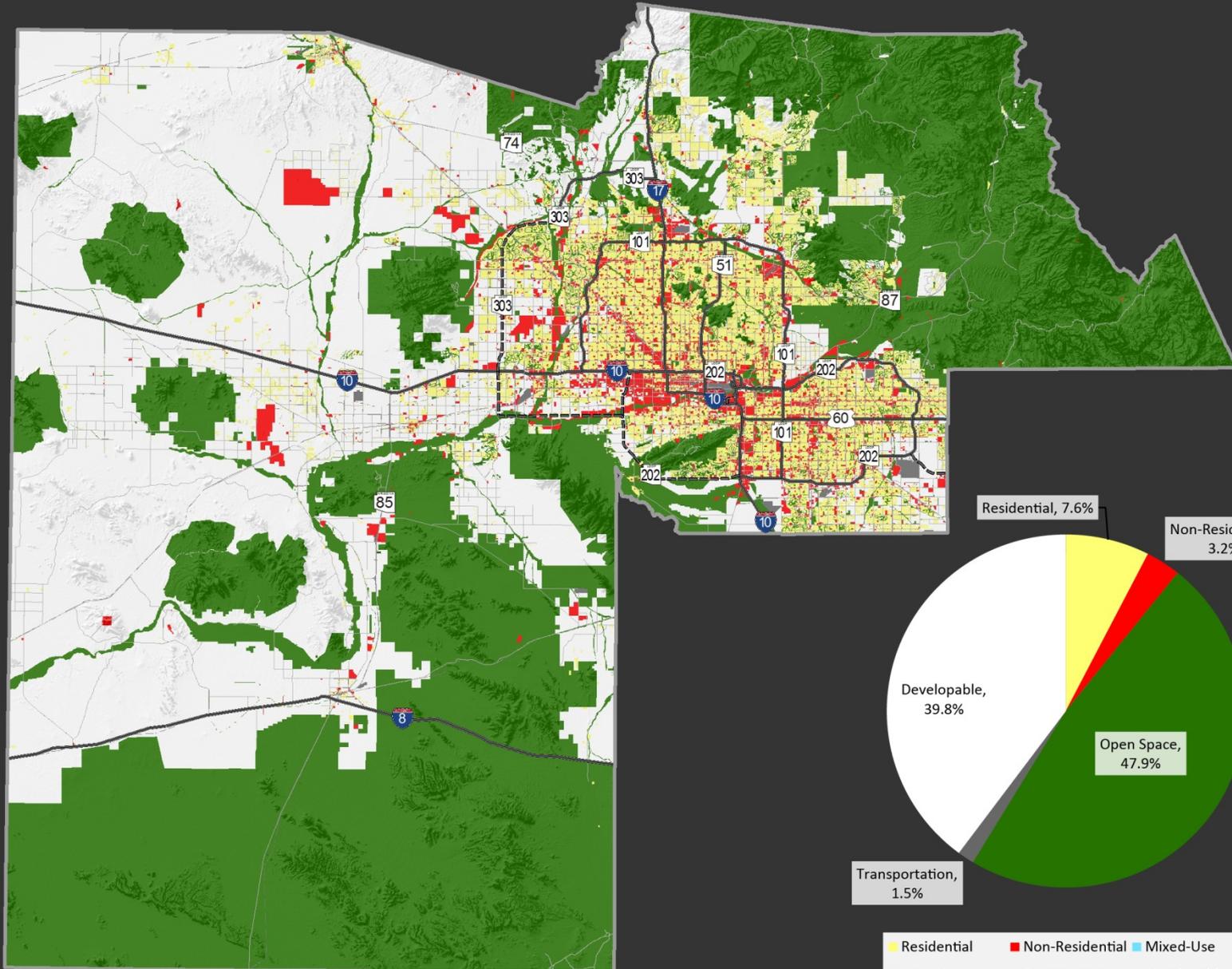
| Land Availability | | | |
|--|-----------------------------|-----------------|---------------|
| Maricopa County, 2012 | | | |
| Developed / Undevelopable Land: | Use | Sq Miles | Pct |
| | Residential | 699 | 12.6% |
| | Non-Residential | 291 | 5.2% |
| | Mixed-Use | 0.03 | 0.0% |
| | Open Space | 4,421 | 79.7% |
| | Other (Transportation, etc) | 140 | 2.5% |
| | Total Undevelopable | 5,551 | 100.0% |
| Developable Land: | Proposed Use | Sq Miles | Pct |
| | Residential | 3,089 | 84.1% |
| | Non-Residential | 292 | 7.9% |
| | Mixed-Use | 92 | 2.5% |
| | Flexible-Use | 50 | 1.4% |
| | Other (Transportation, etc) | 149 | 4.1% |
| | Total Developable | 3,673 | 100.0% |
| Maricopa County: 9,223 Square Miles | | | |

Sources: MAG Member Agencies, MAG Existing Land Use 2012, MAG Developments 2012, MAG General Plan 2012



Land Development Status

ATT Four
Item 6



Source: MAG Existing Land Use 2012



0 5 10 15 20 Miles

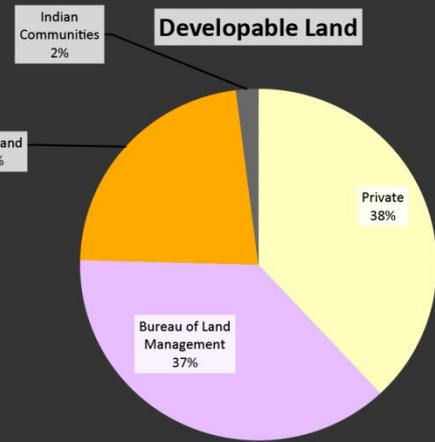
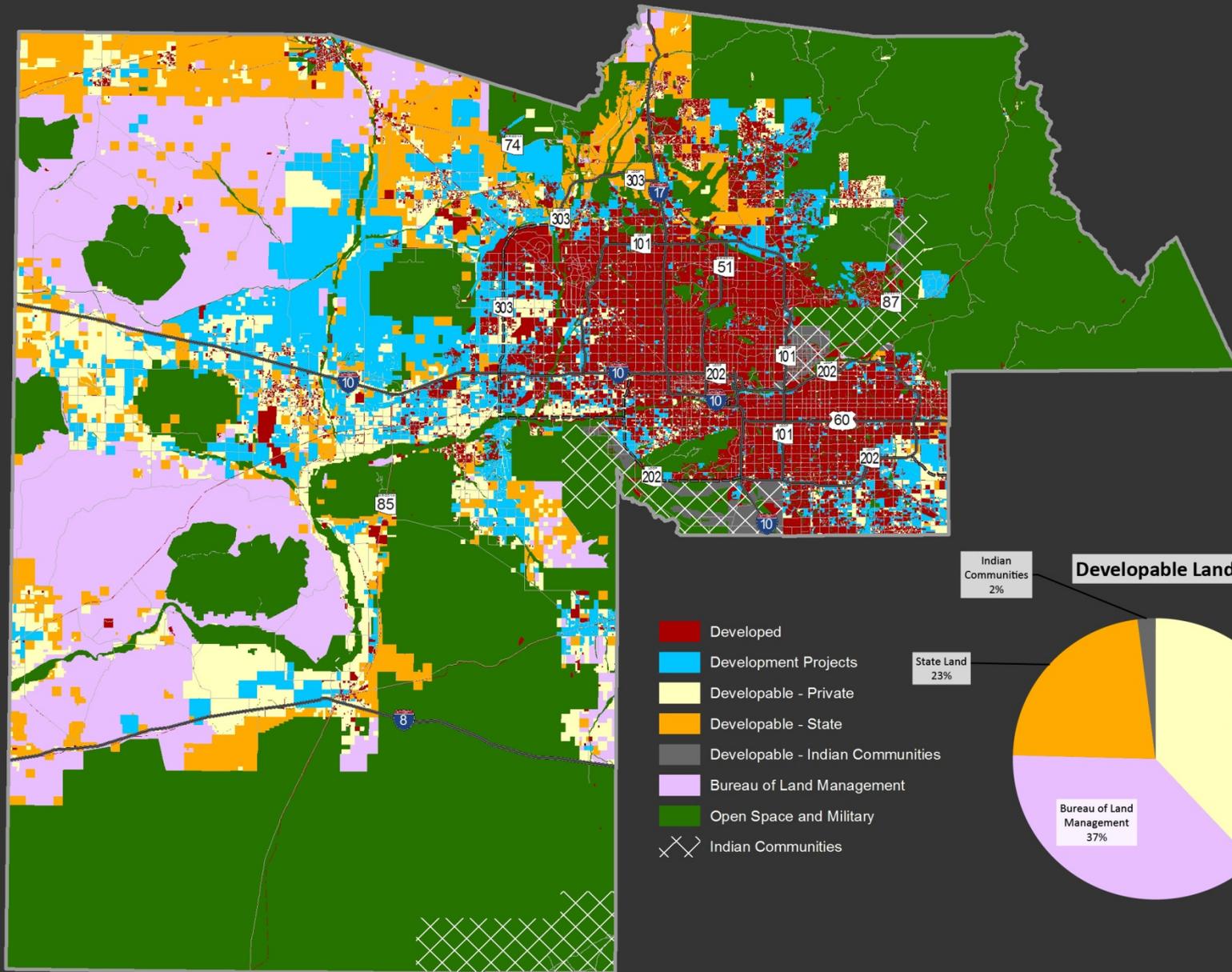
Ownership of Developable Land

- Remaining Developable land:
 - 38% - Private Ownership
 - 37% - Bureau of Land Management
 - 23% - Arizona State Land Department
- 60% of Developable Land Federally or State owned

| Developable Land | | |
|------------------------------|-----------------|---------------|
| Maricopa County, 2012 | | |
| Ownership | Sq Miles | Pct |
| Private | 1,398 | 38.1% |
| Bureau of Land Management | 1,372 | 37.4% |
| State Land | 829 | 22.6% |
| Indian Communities | 74 | 2.0% |
| Total Developable | 3,673 | 100.0% |

Sources: MAG Existing Land Use 2012, ASLD Ownership 2012

Development Status: Land Ownership



- Developed
- Development Projects
- Developable - Private
- Developable - State
- Developable - Indian Communities
- Bureau of Land Management
- Open Space and Military
- Indian Communities





Questions?