

ARIZONA'S ECONOMY

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Real Estate Boom Turbo-Charges the Economy

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June 1, 2005

Our view of Arizona's economy brightened considerably since the last forecast update. Revisions to employment estimates now show that Arizona is creating jobs at a rapid pace, and that the "jobless recovery" was really a measurement issue rather than a lack of job creation. Additionally, consumers continue to spend robustly, and a boom in housing markets is turbo-charging the economy. As a result, we've raised our forecast for this year and next. Even so, the economy is likely past the point where growth is accelerating and we expect growth to slow in coming months as housing softens and consumers spend a little less freely.

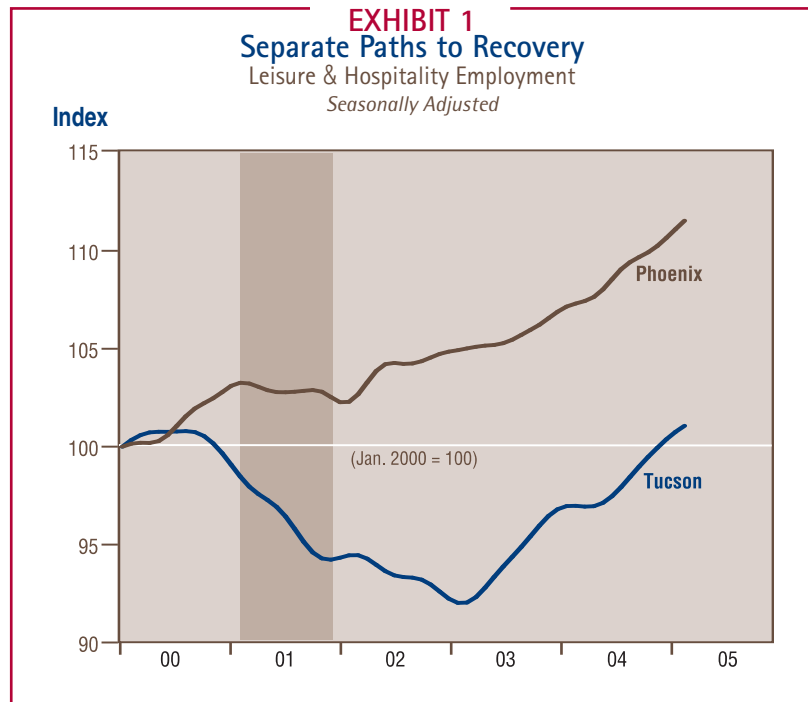
As it turns out, the jobless recovery was a "non story" in Arizona. Revisions released during the annual re-benchmarking process found an additional 28,500 new jobs statewide for calendar year 2004 (on an annual average basis). This represents the largest revision since 1996. So, rather than creating a stodgy 64,600 new jobs as initially reported, the job gain was a solid 87,800 (December 2004 vs. December 2003). Moreover, job creation was accelerating as the year came to an end, so that by March, the 12-month gain exceeded 91,400. That's roughly the same pace that Arizona experienced during the late 1990's investment boom!

Nearly one-third of the newly-counted jobs were in retail trade (8,100). Professional and business services accounted for 5,000, and educational & health services for 1,900. Although more jobs were found, they were predominately in population-serving sectors, which means that growth continues to elude export-based/high tech sectors. Manufacturing is now growing, but not by much (900 jobs during the past twelve months) and the information sector continues to decline (down 2,800 jobs).

Comparing Tucson and Phoenix sector-by-sector, we find a big difference in leisure & hospitality. Metro Tucson was much harder hit during the recession (losing 8% of its employees in this sector) and slower to recover (only now getting back to pre-recession staffing levels). Metro Phoenix, by comparison, has nearly 12% more workers than at the beginning of 2000 (Exhibit 1).

The opposite is true for both manufacturing and information sectors, where metro Tucson has fared much better. Modest gains in both metros can be expected for manufacturing going forward, but recovery for information will be delayed a while longer.

EXHIBIT 1
Separate Paths to Recovery
Leisure & Hospitality Employment
Seasonally Adjusted



Consumer Finances (and Spending) Remain Healthy

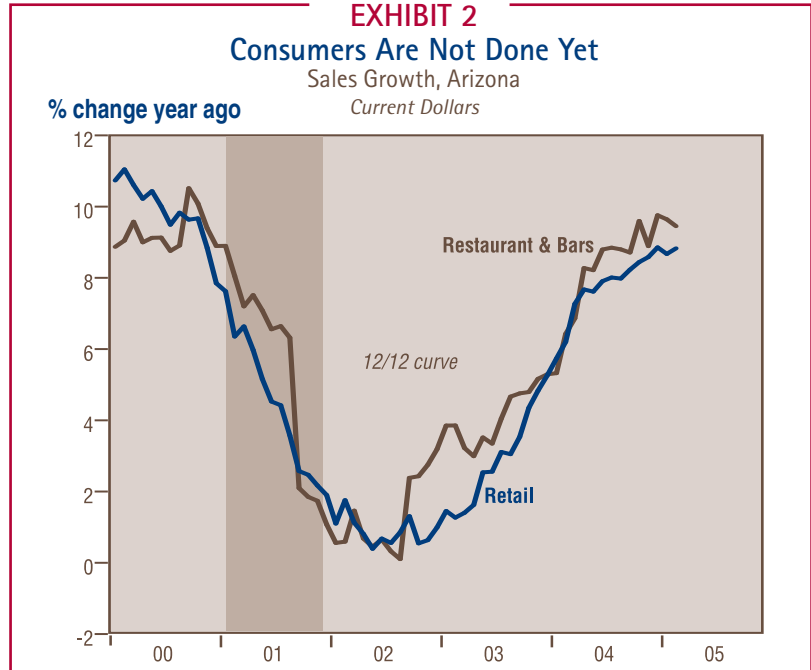
How can consumers continue to fuel this expansion with their free-wheeling spending? They certainly face a multitude of challenges: higher prices for many items (especially gasoline), higher interest (and mortgage) rates, heavy debt, and low savings rates. Yet consumer confidence has held up well, with readings just below 100 as measured by the Conference Board and Phoenix-based Behavior Research Center.

The reason is that the overall financial condition of consumers remains excellent. Household net worth nationwide is at a record level: since the recession ended some three years ago, household liabilities have risen by \$2.7 trillion, but household assets (which include the values of homes, stocks, bonds, and pension funds) have soared by \$10 trillion! Delinquency rates on consumer loans have trended lower and the percentage of mortgages past due now stands at the lowest level in ten years.

Moreover, job growth is strong and wages are rising at the fastest pace in five years. In Arizona, job growth exceeds 4% and private sector wages are rising at a 4.3% rate so far this year.

With current income growing at the strongest pace since the investment boom of the late 1990s and with net worth at record levels, consumers have the ability to continue spending freely. Those who have trouble keeping up can tap a multitude of credit sources available to them. For some, use of interest only mortgages, no money down, no interest for several months, etc, is a time bomb that will eventually boost bankruptcies. For now, bankruptcy statistics are headed downward.

On a rolling 12-month basis, retail sales in Arizona is growing at nearly a 9% rate, the fastest in five years (Exhibit 2). Restaurant & bar sales are even stronger, growing at 9.5% pace. Gasoline sales over the same period are up 17%, due to higher prices at the pump.



Real Estate and the "B" Word

Red hot real estate markets are turbo-charging the Arizona economy. Although the construction industry normally comprises 6-7% of nonfarm jobs in Arizona, this industry has provided 16.8% of net new jobs over the past four years and 18.0% during 2004. Low interest rates, demand for second homes and retirement homes on the part of aging baby-boomers, and demand from immigrants have been the key factors. More recently, investor interest in real estate has provided additional demand and an "urgency" in the market not seen since the late 1970's.

Is the market experiencing a bubble—or a just a boom? What's the difference? Well, it's a bubble if prices get bid up higher than can be justified by economic fundamentals and then fall after the boom ends.

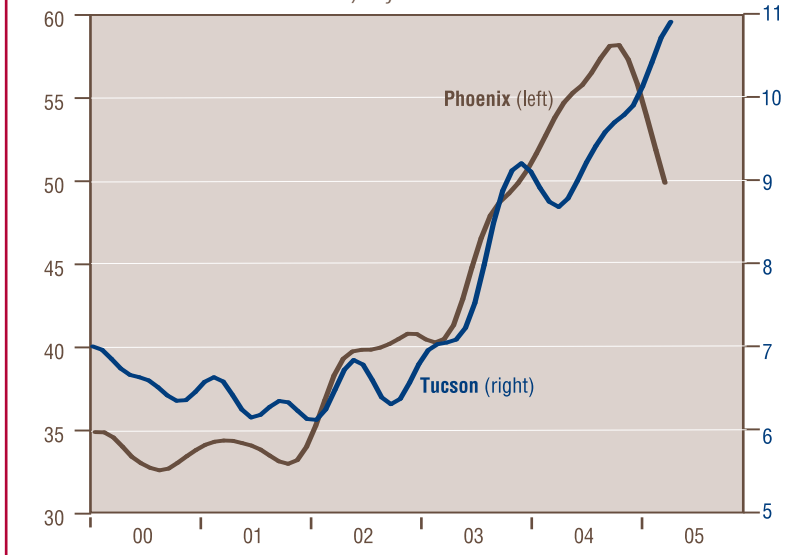
We won't have the answer to that for a while longer since bubbles are impossible to see until after they burst—and prices continue to move up. According to OFHEO, the regulatory agency for Freddie Mac and Fannie Mae, home prices increased 11.2% nationwide over the year ending in the fourth quarter. In Arizona, prices increased by 14.5% during the year (15.3% in Flagstaff, 14.2% in Phoenix, and 12.4% in Tucson). That placed Arizona in 10th place, with Nevada (32.4%), Hawaii (24.6%), and California (23.4%) at the top of the list. Other top-10 states were Florida, and states that share a border with Washington, D.C.

Arizona's economy is in a full-fledged boom, similar to the high-tech led boom of the late 1990's.

EXHIBIT 3

Has Homebuilding Peaked in Metro Phoenix?

Single Family Building Permits (000s)
Seasonally Adjusted Annual Rate



Opportunity Index (HOI), which compares affordability in some 159 metro areas across the country. Using data for last year's fourth quarter, the most affordably market was Lima, OH where median housing prices are only \$84,000. The least is Los Angeles-Long Beach where only 5.2% of homes are affordable by a median income family (median housing price is \$415,000).

Metro Phoenix, where a family with median income of \$58,600 could afford 63.7% of homes for sale, ranked 82nd. The Tucson market was less affordable, primarily due to lower incomes, and Yuma was the most affordable of the three Arizona metros (Exhibit 4). HOI was down from the prior quarter in both Phoenix (from 67.5) and Tucson (63.8).

An even better measure is published by the Arizona Real Estate Center at Arizona State University. Here, the affordability index compares the median income with the median housing price for the metro Phoenix area. An index of 120 means that the family has 120% of the income needed to buy the median priced home.

Interestingly, the OFHEO data show a rapid deceleration in most states during the fourth quarter. Nationwide, prices increased at an annual rate of 6.8% compared to 19.2% annual rate during the 3rd quarter. Could this be signaling the end of the boom?

A second indicator (this time for Arizona) also begs that same question. Single family building permits statewide moved lower in early 2005. Even more intriguing is that the decline is centered in the metro Phoenix market, where permits have fallen from a 58,000 unit annual pace in September-October of 2004 to under 50,000 in March. By contrast, metro Tucson permits continue to climb toward 11,000 (Exhibit 3).

Is housing beginning to cool? Have investors abandoned Phoenix in search of new "undiscovered" markets? Will the boom turn into a bust? Will housing prices fall?

Housing Affordability Headed South

The surge in prices, along with higher interest rates, has seriously eroded housing affordability in recent months. Many buyers have been forced to lower their expectations and many with lower incomes have been priced out of the market.

The National Association of Home Builders (NAHB) recently resumed publication of their Housing

The surge in prices, along with higher interest rates, has seriously eroded housing affordability in recent months. Many buyers have been forced to lower their expectations and many with lower incomes have been priced out of the market.

Affordability peaked in the first quarter of 2003 and plunged last spring as prices began to take off. As of the first quarter, affordability for resale homes stands at its lowest level in 15 years (for new homes, it's the lowest in 10 years). See Exhibit 5.

It's still too early to tell if the boom will turn into a bubble, or to declare an end to the housing boom. But the market will slow soon. Fortunately, the slowdown should be relatively mild compared to past downturns. Since the early 1970's, housing prices nationwide have fallen only twice, and both were during a recession. In the current environment, the fundamentals (an expanding economy and demographics) for housing remain positive and argue against a catastrophic drop in demand. And prices are likely to stabilize rather than decline as urgency evaporates. Housing will soon relinquish its role as the economy's turbocharger, and may even become a modest drag on overall growth.

The Outlook

In other news, Arizona escaped the recent round of BRAC (Base Realignment and Closure) without serious harm. The state is slated to lose a modest 550 jobs, primarily due to realignment at Luke AFB and Fort Huachuca. The biggest disappointment was that no new missions were transferred in. Arizona still could capture new missions in coming months.

Arizona's economy will continue to expand, just at a slower pace that's more in line with trend growth (see forecast tables page 5). Look for 125,000 new jobs to be created this year, then closer to 90,000 next year. Retail sales will slow from an 8.3% gain this year to near six percent next year. Population growth will exceed 200,000 each year. These huge numbers reflect trend growth for Arizona. ■

EXHIBIT 4 Housing Opportunity Index 4th Quarter 2004

Source: National Association of Home Builders

| | HOI* | INCOME* | PRICE* | NATIONAL RANK |
|--------------|------|---------|--------|---------------|
| Phoenix-Mesa | 63.7 | 58.6 | 183 | 82 |
| Tucson | 61.2 | 50.4 | 165 | 91 |
| Yuma | 72.5 | 39.8 | 108 | 50 |

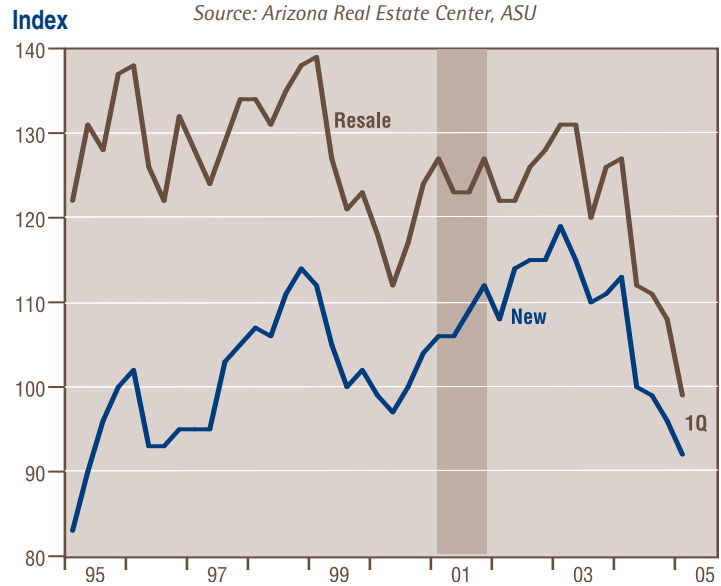
- share of homes affordable for a family with median income, percent
- * 2004 median family income (\$000s), source: HUD
- median sales price (\$000s)

Source: www.nahb.org/hoi

EXHIBIT 5 Housing Affordability Plunges

Housing Affordability Index, Metro Phoenix

Source: Arizona Real Estate Center, ASU



*The economy is likely past the point where growth is accelerating.
Expect a slowing to "trend" growth.*

FORECAST TABLES

| Arizona | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|-----------------------------------|---------|---------|---------|---------|---------|---------|---------|
| Personal Income (\$ mill) | 161,326 | 176,204 | 190,891 | 204,550 | 219,728 | 236,984 | 255,836 |
| percent change | 7.3 | 9.2 | 8.3 | 7.2 | 7.4 | 7.9 | 8.0 |
| Wage per Employee | 37,816 | 39,456 | 41,290 | 43,255 | 45,312 | 47,473 | 49,648 |
| percent change | 3.8 | 4.3 | 4.6 | 4.8 | 4.8 | 4.8 | 4.6 |
| Aggregate Retail Sales (\$ mill)* | 66,027 | 72,269 | 76,352 | 80,141 | 84,291 | 89,363 | 94,952 |
| percent change | 9.7 | 9.5 | 5.7 | 5.0 | 5.2 | 6.0 | 6.3 |
| Population (000s, mid-year) | 5,832.2 | 6,035.2 | 6,236.2 | 6,428.9 | 6,616.2 | 6,808.3 | 7,008.1 |
| percent change | 3.6 | 3.5 | 3.3 | 3.1 | 2.9 | 2.9 | 2.9 |
| Residential Permits | 85,728 | 83,802 | 76,919 | 69,682 | 67,678 | 68,382 | 69,622 |
| percent change | 21.4 | -2.2 | -8.2 | -9.4 | -2.9 | 1.0 | 1.8 |
| Non Farm Employment (000s) | 2,379.4 | 2,504.4 | 2,596.2 | 2,662.0 | 2,726.7 | 2,802.5 | 2,883.4 |
| percent change | 3.6 | 5.3 | 3.7 | 2.5 | 2.4 | 2.8 | 2.9 |
| Goods-Producing | 377.2 | 399.3 | 410.1 | 415.8 | 420.5 | 426.6 | 434.9 |
| percent change | 4.9 | 5.9 | 2.7 | 1.4 | 1.1 | 1.5 | 1.9 |
| Service-Providing | 2,002.3 | 2,105.3 | 2,186.3 | 2,246.4 | 2,306.5 | 2,376.1 | 2,448.7 |
| percent change | 3.4 | 5.1 | 3.8 | 2.7 | 2.7 | 3.0 | 3.1 |
| Trade, Trans., & Utilities | 462.0 | 485.6 | 503.9 | 515.8 | 527.9 | 543.4 | 559.9 |
| percent change | 3.6 | 5.1 | 3.8 | 2.4 | 2.4 | 2.9 | 3.0 |
| Prof. & Business Services | 334.4 | 366.5 | 386.9 | 398.2 | 409.5 | 425.0 | 441.1 |
| percent change | 4.4 | 9.6 | 5.6 | 2.9 | 2.9 | 3.8 | 3.8 |
| Leisure & Hospitality | 242.9 | 253.2 | 261.4 | 267.9 | 275.2 | 283.3 | 290.9 |
| percent change | 4.1 | 4.2 | 3.2 | 2.5 | 2.7 | 2.9 | 2.7 |
| Government | 400.6 | 413.9 | 426.2 | 434.8 | 442.4 | 451.0 | 462.0 |
| percent change | 1.8 | 3.3 | 3.0 | 2.0 | 1.7 | 1.9 | 2.4 |
| Phoenix-Mesa Metro Area | | | | | | | |
| Personal Income (\$ mill) | 113,541 | 124,458 | 135,569 | 145,653 | 157,126 | 170,151 | 184,224 |
| percent change | 6.8 | 9.6 | 8.9 | 7.4 | 7.9 | 8.3 | 8.3 |
| Wage per Employee | 43,617 | 45,583 | 47,840 | 50,288 | 52,965 | 55,711 | 58,484 |
| percent change | 3.4 | 4.5 | 5.0 | 5.1 | 5.3 | 5.2 | 5.0 |
| Aggregate Retail Sales (\$ mill)* | 45,372 | 49,807 | 52,363 | 54,989 | 58,328 | 62,256 | 66,294 |
| percent change | 10.0 | 9.8 | 5.1 | 5.0 | 6.1 | 6.7 | 6.5 |
| Population (000s, mid-year) | 3,742.5 | 3,897.2 | 4,037.2 | 4,160.3 | 4,285.6 | 4,418.4 | 4,556.1 |
| percent change | 4.0 | 4.1 | 3.6 | 3.0 | 3.0 | 3.1 | 3.1 |
| Residential Permits | 64,229 | 64,116 | 55,909 | 49,183 | 50,065 | 53,014 | 55,003 |
| percent change | 17.1 | -0.2 | -12.8 | -12.0 | 1.8 | 5.9 | 3.8 |
| Non Farm Employment (000s) | 1,680.0 | 1,777.4 | 1,850.6 | 1,897.3 | 1,944.0 | 2,001.9 | 2,064.3 |
| percent change | 3.7 | 5.8 | 4.1 | 2.5 | 2.5 | 3.0 | 3.1 |
| Goods-Producing | 271.4 | 290.1 | 298.0 | 298.4 | 301.0 | 308.4 | 317.2 |
| percent change | 3.5 | 6.9 | 2.7 | 0.1 | 0.9 | 2.5 | 2.8 |
| Service-Providing | 1,408.7 | 1,487.2 | 1,552.6 | 1,599.0 | 1,643.0 | 1,693.5 | 1,747.1 |
| percent change | 3.8 | 5.6 | 4.4 | 3.0 | 2.8 | 3.1 | 3.2 |
| Trade, Trans., & Utilities | 340.7 | 358.2 | 371.8 | 381.6 | 391.8 | 403.8 | 416.3 |
| percent change | 3.6 | 5.1 | 3.8 | 2.6 | 2.7 | 3.1 | 3.1 |
| Prof. & Business Services | 269.7 | 294.2 | 315.3 | 326.6 | 334.2 | 344.5 | 356.9 |
| percent change | 4.3 | 9.1 | 7.2 | 3.6 | 2.3 | 3.1 | 3.6 |
| Leisure & Hospitality | 162.7 | 170.7 | 176.9 | 181.4 | 187.3 | 193.8 | 199.6 |
| percent change | 4.3 | 4.9 | 3.6 | 2.5 | 3.3 | 3.5 | 3.0 |
| Government | 221.8 | 230.1 | 237.0 | 241.5 | 245.8 | 250.8 | 257.2 |
| percent change | 2.4 | 3.7 | 3.0 | 1.9 | 1.8 | 2.0 | 2.5 |
| Tucson Metro Area | | | | | | | |
| Personal Income (\$ mill) | 24,484 | 26,312 | 28,474 | 30,409 | 32,533 | 34,825 | 37,233 |
| percent change | 6.1 | 7.5 | 8.2 | 6.8 | 7.0 | 7.0 | 6.9 |
| Wage per Employee | 36,319 | 37,699 | 39,409 | 41,144 | 42,957 | 44,794 | 46,633 |
| percent change | 3.0 | 3.8 | 4.5 | 4.4 | 4.4 | 4.3 | 4.1 |
| Aggregate Retail Sales (\$ mill)* | 9,902 | 10,661 | 11,276 | 11,780 | 12,356 | 12,972 | 13,606 |
| percent change | 7.4 | 7.7 | 5.8 | 4.5 | 4.9 | 5.0 | 4.9 |
| Population (000s, mid-year) | 931.2 | 957.0 | 981.9 | 1,004.4 | 1,026.2 | 1,048.3 | 1,070.2 |
| percent change | 2.2 | 2.8 | 2.6 | 2.3 | 2.2 | 2.2 | 2.1 |
| Residential Permits | 10,410 | 10,573 | 10,063 | 9,052 | 8,835 | 8,912 | 8,858 |
| percent change | 25.3 | 1.6 | -4.8 | -10.1 | -2.4 | 0.9 | -0.6 |
| Non Farm Employment (000s) | 359.1 | 374.5 | 387.2 | 395.8 | 403.6 | 411.7 | 419.6 |
| percent change | 3.1 | 4.3 | 3.4 | 2.2 | 2.0 | 2.0 | 1.9 |
| Goods-Producing | 54.1 | 56.5 | 58.6 | 59.4 | 59.7 | 60.2 | 60.9 |
| percent change | 2.5 | 4.4 | 3.7 | 1.5 | 0.5 | 0.7 | 1.2 |
| Service-Providing | 305.0 | 318.0 | 328.7 | 336.3 | 343.8 | 351.5 | 358.7 |
| percent change | 3.2 | 4.3 | 3.4 | 2.3 | 2.2 | 2.2 | 2.0 |
| Trade, Trans., & Utilities | 57.8 | 60.5 | 62.3 | 63.5 | 64.7 | 66.0 | 67.2 |
| percent change | 5.1 | 4.5 | 3.1 | 1.9 | 1.9 | 2.0 | 1.9 |
| Prof. & Business Services | 42.6 | 44.8 | 48.4 | 50.9 | 52.9 | 54.9 | 56.8 |
| percent change | 3.2 | 5.3 | 8.1 | 5.1 | 4.0 | 3.8 | 3.4 |
| Leisure & Hospitality | 38.9 | 41.4 | 42.9 | 43.9 | 44.9 | 46.0 | 46.9 |
| percent change | 4.5 | 6.6 | 3.6 | 2.3 | 2.3 | 2.4 | 2.0 |
| Government | 79.4 | 80.8 | 82.0 | 83.0 | 84.0 | 85.2 | 86.3 |
| percent change | 0.9 | 1.8 | 1.5 | 1.2 | 1.3 | 1.3 | 1.3 |

* Aggregate Retail Sales includes retail, food, restaurant & bars and gasoline sales.
 Source: Economic and Business Research Center, Eller College of Management, The University of Arizona

Arizona Indian Tribes and Their Contribution to the State's Economy

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Research Associate

The economic outlook for Arizona's economy is bright: 2004 was the best year for business conditions in 10 years.¹ Arizona was among the first states to recover job losses from the 2001 recession and the state continues to add jobs. Healthy consumer spending, record-high housing markets, and continued low inflation, among other factors, contribute to a healthy picture.

One sector of Arizona's economy with surging revenues is often overlooked—the economies of Arizona Indian tribes. This article takes a snapshot of Arizona's 21 federally-recognized (i.e., sovereign) tribes and their contribution to state and local revenues.

Since the U.S. Congress approved the Indian Gaming Regulatory Act in 1988, Indian tribes have grossed hundreds of millions of dollars in gaming revenues. A recent newspaper account reported that tribal gaming across the country generated \$18.5 billion in gross revenues in 2004. Gaming tribes also made \$100 million in charitable contributions to various organizations the same year.² Revenues of Arizona gaming tribes are part of those statistics. Moreover, Arizona tribes recently renegotiated their 1992 agreements to include statutory contributions to state and local government.

Indian Gaming Revenues: 2004
U.S. Gross Revenues: \$18.5 billion
U.S. Charitable Contributions: \$100 million
Arizona Gross Revenues: \$1.35 billion

Long before they began operating full service casinos with live tables and shows, Arizona Indian tribes—and their members and others who live on the reservations—have by necessity spent their incomes and revenues off reservation. Their contribution to Arizona's economy has burgeoned since then. Fifteen tribes now operate 22 casinos in state. In fiscal year 2004 gross gaming revenues totaled \$1,349,801,856, as reported by the Arizona Department of Gaming.³ Additionally, gaming tribes must now contribute a portion of their gross revenues to various agencies and programs ("tribal-shared revenues"). The statutory distribution formula (A.R.S. 5-601.02 [H]) and Section 12 of the Tribal-State Compacts require tribes to share from 1 percent to 8 percent of gross revenues, depending on the amount of gross revenues. Twelve percent of shared revenues go to counties, cities and towns (\$2.6 million in 2004); 9 percent (capped at \$8 million) to the Arizona Department of Gaming; 2 percent to problem gaming programs (\$433,000 in 2004), and the remainder (\$39 million in 2004) to school districts, the state Trauma Emergency Services Fund, the Tourism Fund, and the Wildlife Conservation Fund. The Tohono O'odham Nation provides an example of tribal-shared revenues for 2004; The Nation shared \$366,346 with Pinal County, Casa Grande, Eloy, Coolidge and Gila Bend.⁴ It voluntarily gave the city of Tucson \$646,292, the United Community Health Center \$125,509, Pima County \$50,000 to purchase car seats, and \$175,000 to assist American Indians living in the urban area.⁵ The six non-gaming tribes also benefit indirectly from gaming: they receive an allotment of slot machines which they can sell to gaming tribes.

Most gaming tribes also voluntarily share wealth with off-reservation charities and other sponsored events, such as United Way, the Susan G. Komen Race for the Cure, and the YWCA. Additionally, such relatively new wealth enables tribes to invest in new tribal enterprises (e.g., sand and rock companies, hotels, and golf courses), purchase land and businesses off reservation, set up full service fire, police, and other basic service departments, and expend millions off reservation to supply their enterprises and operations. Studies have also documented the off-reservation spending habits of reservation residents, in part to enlighten county and city voters that Indians do

contribute to local and state taxes, although not on the reservation. In 1994, for example, Coconino County commissioned a study to determine the contribution of Navajo Nation (Western Agency only) residents to local taxes. Based on a finding of \$5 million, the county board of supervisors appropriated \$1 million in general funds to spend on the reservation for county infrastructure.⁶ Gaming revenues and tribal spending clearly play a significant role in Arizona's economy.

Arizona has a comparatively large number of tribal governments, tribal populations, tribal lands, and tribal political representation. With 547 federally-recognized tribes in the United States (half in Alaska and over 200 in California), the average number of tribes per state is about 11. Arizona's tribes number 21, situated on 20 reservations. (The Quechan and Fort Mojave tribes are headquartered in California, the tiny San Juan Southern Paiute tribe lives on the Navajo Reservation, and New Mexico's Zuni Pueblo has a small contingent near St Johns.) Tribes control 19.8 million acres of reservation land (26 percent of the state) and several thousand more acres off reservation—some of it held in trust status and thus non-taxable. Enrolled members make up about 5 percent of the state's population.

Arizona also has the largest tribe in the country in terms of both land area and population. The Navajo Nation spreads across six counties in three states, with headquarters in Window Rock, Arizona. It has the most complex political system of any tribe and also elects tribal members to the Arizona Legislature, three county governments, and K-12 school boards located on the reservation.⁷ Navajos are also employed in county offices located on the reservation or they commute to county jobs in the three county seats. Moreover, tribes without populations large enough to get members elected to off-reservation political offices now spend gaming profits to support candidates and influence issues at all levels of government (except municipal). Tribes also enter into various intergovernmental agreements with local governments for the delivery of services. A tribe will hire, say, a county public works department to grade roads. Cross-deputization with law enforcement agencies is the most common type of agreement.

Tribal operations can impact local economies. In the realm of economic development and local

Arizona's 21 tribes control 26 percent of total acreage and comprise 5 percent of the state's population.

taxes the tri-city region of Prescott, Prescott Valley, and Chino Valley has experienced competition from the Yavapai-Prescott Tribe's retail center located just outside Prescott boundaries.⁸ Though the tribe is small—117 enrolled members residing on 2.2 square miles—the center redirected \$3 million to \$4 million in tax revenues away from the tri-city region in 2003. Such competition has necessitated serious effort on the part of municipal officials to interact with various tribes, with and without success. The Tonto Apache Tribe, contiguous to the town of Payson, has also developed commercial enterprises capable of competing with existing businesses in town, and the Fort McDowell tribe developed an off-reservation shopping mall on land it owns.

Tribes have been able to purchase valuable land off reservation. Although putting private land into trust status is a lengthy process that is not always pursued, doing so gives the tribe jurisdiction to develop it as it wishes, including building casinos. The Hopi, for instance, purchased several thousand acres of ranch land in Navajo County. Yet, while the purchase was still in escrow, the Hopi chairman visited the Navajo County Board of Supervisors and other local government officials to give assurance that the tribe would maintain those lands as ranches and keep them on the tax rolls.

Tribes are also participating more in local issues of a regional scope. The Tohono O'odham and Pascua Yaqui tribes in Pima County have statutory representation on the county's newly-authorized regional transportation authority and will cast votes on both a regional transportation plan and whether to seek a sales tax to finance it. These few examples underscore ways that Arizona Indian tribes—as sovereign governments located within 12 of the state's 15 counties—play an important role in the state's economy and governance.

The following table gives a snapshot of Arizona's tribes. It presents each tribe by name, 2000 census population, reservation area in square miles, governing body, and the presence of casinos (gaming revenues disaggregated by tribe are not available).⁹ All tribes (except the Navajo Nation) have constitutions, and all tribes have codes in which the structure of government and system of political representation are set forth. Tribal governing bodies are elected by popular

TABLE 1: ARIZONA TRIBES AT A GLANCE

| NAME | POPULATION (enrolled members of reservation) | AREA (square miles) | GOVERNING BODY/ NAME OF EXECUTIVE | GAMING |
|--------------------------|--|------------------------|--------------------------------------|---------|
| Ak-Chin | 652 | 34 | Council-4/Chairman | Yes |
| Cocopah | 519 | 9.4 | Council-6/Chairman | Yes |
| Colorado River | 2,253 | 353 | Council-9/Chairman | Yes |
| Fort McDowell | 755 | 39 | Council-7/President | Yes |
| Fort Mohave | 360 (AZ) | 37 (AZ, NV, CA) | Council-8/Chairman | Yes |
| Quechan | 9 (AZ) | 68 (AZ, CA) | Council-6/President | Yes |
| Gila River | 10,353 | 581 | Council-21/Governor | Yes |
| Havasupai | 453 | 294 | Council-6/Chairman | No |
| Hopi | 6,573 | 2,439 | Council-20/Chairman | No |
| Hualapai | 1,253 | 1,551 | Council-7/Chairman | No |
| Kaibab-Paiute | 131 | 189 | Council-6/Chairman | No |
| Navajo | 100,382 (AZ) | 23,086 (AZ, NM, UT) | Council-89/President | Pending |
| Pascua Yaqui | 3,003 | 1.4 | Council-11/Chairman | Yes |
| Salt River Pima-Maricopa | 3,366 | 87 | Council-7/President | Yes |
| San Carlos Apache | 8,921 | 2,854 | Council-9/Chairman | Yes |
| San Juan Southern Paiute | 254 | 0 | Council-8/Chairman | No |
| Tohono O'odham | 9,718 | 4,451 | Council-22/Chairman | Yes |
| Tonto Apache | 115 | .13 | Council-5/Chairman | Yes |
| White Mountain Apache | 11,702 | 2,602 | Council-5/Chairman | Yes |
| Yavapai-Apache | 650 | 1 | Council-9/Chairman | Yes |
| Yavapai-Prescott | 117 | 2.2 | Board-5/President | Yes |

Source: Arizona Commission on Indian Affairs

vote, with the term of office four years and on a staggered basis. Additionally, most tribes in Arizona have a well-defined administrative branch with professional managers and finance directors, as well as typical departments such as economic development, public works, and human resources. Some have combined two or more small tribes into one sovereign entity. Seven tribes hold district elections, and the presiding officer is often elected at large, though not always with full executive powers; some sit as voting council members.

Most tribes do not separate the executive from the legislative branch, but the larger tribes have not only an executive branch but also an independent judiciary. The presiding officer is typically called chairman, president, or governor. Length of terms are from two to four years, and the legislative body, usually called a council, is elected by district in larger tribes and at-large in the others.

Reservations divided into districts also elect local district officials—a system of local government of sorts. Further, many tribes levy their own taxes, usually a sales and/or bed tax on non-reservation residents. They also charge extraction fees to private companies that mine on reservations.

The Navajo Nation is one of six tribes that do not have gaming enterprises (three of the other five started casinos that eventually folded). Two referenda on gaming have been defeated by voters, but with the certain loss of millions of dollars in revenue at the end of 2005 when the Black Mesa Mine closes, two Navajo chapters (i.e., local governments) in Arizona and three in New Mexico have been granted permission to have casinos. The president of Arizona's Leupp Chapter in Coconino County estimates that its proposed casino would bring in \$30 million to \$50 million in just the first year of operation.¹⁰

Summary

Economists and forecasters often overlook the economic activity of Arizona Indian tribes. In 2004 gross tribal gaming revenues amounted to \$1.34 billion. State statutes and gaming compacts require that tribes contribute a percentage of gross earnings based on a sliding scale (e.g., 1 percent of the first \$25 million, etc.). The annual contribution—tribal-shared revenues—is distributed to counties, cities and towns, the Arizona Department of Gaming, problem gaming programs, and various other agencies, including \$21.8 million to the Instructional Improvement Fund. Moreover, Arizona tribes voluntarily contribute to community charities and political campaigns. They also vie for—and win—elective office in state, county, and regional entities. The participation of Indian tribes in Arizona economic life is significant and merits awareness on the part of Arizonans.

Tanis Salant founded The University of Arizona's Institute for Local Government in 1988 and served as director until her retirement in 2005. Her research interests include county-tribal relations, county and city charter government, municipal incorporation, and the public costs of criminal illegal immigration. She teaches for the School of Public Administration and Policy and researches special topics for the Economic and Business Research Center.

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Related articles by author on EBR website:

- Grading Arizona Government's Performance
- Professional Public Management: A Competitive and Critical Factor in Arizona's Economy ■

Arizona has an Estimated 500,000 Undocumented Population

*By Alberta Charney, Ph.D.
Senior Research Economist
April 4, 2005*

In a recent report published by the Pew Hispanic Center, researcher Jeffrey Passel estimates the size and characteristics of the undocumented population in the United States.

According to Passel, the number of undocumented residents in the U.S. reached 10.3 million in March 2004. More than half of these (57%) are undocumented Mexicans. The study also estimates that 80 to 85 percent of all migration from Mexico has been undocumented in recent years.

Two methodologies were used to estimate the number of undocumented residents, depending on the state. For the U.S., California, New York, Texas, Florida, Illinois and New Jersey, states with historically large undocumented resident populations, the "residual method" was used. In this method, undocumented migrants are estimated as the difference between the total foreign-born population and the legal foreign-born population. Estimates of the total foreign-population are based on the March 2004 *Current Population Survey*, with adjustments for misreporting of place of birth and application of correction factors derived from official 2000 estimates of the census undercount.

The methodology for estimating undocumented residents for the remaining 44 states and the District of Columbia was a "synthetic method." In this method, the ratio of undocumented residents to the total foreign-born population for the entire group of 45 regions was applied to the total foreign-born population in each of the 45 states (including DC).

The largest undocumented migrant population over the 2002-2004 period were in California (2.4 mil), Texas (1.4 mil), Florida (850,000), New York (650,000), Arizona (500,000), Illinois (400,000), New Jersey (350,000), and North Carolina (300,000). All remaining states and the District of Columbia have an estimated 3.15 million undocumented migrant persons.

For the complete study, go to: <http://pewhispanic.org/reports/report.php?ReportID=44> ■

80-85 percent of migration from Mexico has been undocumented in recent years.

ARIZONA ECONOMIC INDICATORS

| | DEC 2004 | JAN 2005 | FEB 2005 | MAR 2005 | APR 2005 | % change versus year ago for most recent: month 12-months | |
|---|-------------|-------------|-------------|-------------|-------------|--|-------|
| APACHE COUNTY | | | | | | | |
| Civilian Labor Force, ADES | | | | | | | |
| Employment | 21,975 | 20,075 | 20,125 | 20,150 | 20,350 | -0.6 | -0.6 |
| Unemployment | 19,650 | 17,975 | 17,975 | 17,950 | 18,150 | 0.1 | 0.4 |
| Unemployment Rate (%) | 2,325 | 2,100 | 2,150 | 2,200 | 2,200 | -6.4 | -7.3 |
| Unemployment Rate (%) | 10.6 | 10.5 | 10.7 | 10.9 | 10.8 | -5.8 | -6.7 |
| Employees on Nonagricultural Payrolls, ADES | | | | | | | |
| Total | 20,100 | 19,300 | 19,550 | 19,800 | 19,975 | 2.0 | 0.8 |
| <i>Total Private</i> | 6,450 | 6,400 | 6,350 | 6,550 | 6,675 | 2.7 | -0.7 |
| Goods-Producing | 675 | 600 | 550 | 650 | 650 | -7.1 | -14.2 |
| Service-Providing | 19,425 | 18,700 | 19,000 | 19,150 | 19,325 | 2.4 | 1.4 |
| Trade, Transportation, and Utilities | 2,025 | 1,825 | 1,825 | 1,850 | 1,850 | -1.3 | -0.7 |
| Other Private Service-Providing | 3,750 | 3,975 | 3,975 | 4,050 | 4,175 | 6.4 | 2.0 |
| <i>Government</i> | 13,650 | 12,900 | 13,200 | 13,250 | 13,300 | 1.7 | 1.6 |
| Federal Government | 3,075 | 3,100 | 3,100 | 3,100 | 3,125 | 3.3 | 2.8 |
| State and Local Government | 10,575 | 9,800 | 10,100 | 10,150 | 10,175 | 1.2 | 1.2 |
| Sales (\$000s) ADOR | | | | | | | |
| Gross Retail | 11,947 | 9,314 | 9,678 | 12,346 | ... | 7.8 | 10.2 |
| Retail | 6,248 | 4,101 | 4,743 | 5,425 | ... | -1.6 | 4.5 |
| Restaurants & Bars | 836 | 579 | 752 | 785 | ... | 17.7 | 12.9 |
| Gasoline, EBR | 4,862 | 4,634 | 4,183 | 6,136 | ... | 16.4 | 15.8 |
| Gallons (000s) ADOT | 2,567 | 2,570 | 2,134 | 2,569 | ... | -4.9 | 0.0 |
| Contracting | 6,987 | 5,128 | 6,447 | 6,865 | ... | 37.1 | -18.9 |
| Hotel/Motel | 878 | 640 | 765 | 985 | ... | 40.3 | 7.6 |
| New Housing Units Authorized, Census C-40 | | | | | | | |
| Total Units | 3 | | | | | | |
| Single Family Units | 3 | | | | | | |
| Note: Apache County is not required to report monthly in 2005 | | | | | | | |
| NAVAJO COUNTY | | | | | | | |
| Civilian Labor Force, ADES | | | | | | | |
| Employment | 36,850 | 37,025 | 36,850 | 36,575 | 37,025 | -2.1 | -2.1 |
| Unemployment | 34,050 | 33,975 | 33,750 | 33,400 | 33,975 | -2.0 | -1.8 |
| Unemployment Rate (%) | 2,800 | 3,050 | 3,100 | 3,175 | 3,050 | -3.2 | -5.1 |
| Unemployment Rate (%) | 7.6 | 8.2 | 8.4 | 8.7 | 8.2 | -1.1 | -3.1 |
| Employees on Nonagricultural Payrolls, ADES | | | | | | | |
| Total | 28,425 | 28,025 | 28,175 | 28,275 | 28,675 | -0.5 | -1.1 |
| <i>Total Private</i> | 17,600 | 17,325 | 17,300 | 17,475 | 17,875 | 1.6 | 0.0 |
| Goods-Producing | 3,225 | 3,100 | 3,075 | 3,100 | 3,175 | -0.8 | -1.1 |
| Mining and Construction | 2,350 | 2,225 | 2,225 | 2,250 | 2,300 | -1.1 | -4.0 |
| Manufacturing | 875 | 875 | 850 | 850 | 875 | 0.0 | 8.0 |
| Service-Providing | 25,200 | 24,925 | 25,100 | 25,175 | 25,500 | -0.5 | -1.1 |
| Trade, Transportation, and Utilities | 5,450 | 5,350 | 5,350 | 5,375 | 5,475 | 1.4 | -0.3 |
| Information | 625 | 625 | 625 | 625 | 625 | 0.0 | 3.7 |
| Financial Activities | 550 | 550 | 550 | 550 | 525 | -8.7 | -22.3 |
| Professional and Business Services | 1,125 | 1,150 | 1,175 | 1,175 | 1,200 | 11.6 | 11.5 |
| Educational and Health Services | 3,150 | 3,150 | 3,150 | 3,175 | 3,175 | 3.3 | 2.6 |
| Leisure and Hospitality | 2,675 | 2,650 | 2,625 | 2,700 | 2,925 | 1.7 | 1.7 |
| Other Services | 800 | 750 | 750 | 775 | 775 | 0.0 | -5.5 |
| <i>Government</i> | 10,825 | 10,700 | 10,875 | 10,800 | 10,800 | -3.8 | -2.9 |
| Federal Government | 1,600 | 1,425 | 1,425 | 1,450 | 1,475 | -10.6 | -4.8 |
| State and Local Government | 9,225 | 9,275 | 9,450 | 9,350 | 9,325 | -2.6 | -2.6 |
| Sales (\$000s) ADOR | | | | | | | |
| Gross Retail | 79,178 | 64,615 | 62,040 | 72,114 | ... | 7.7 | 9.2 |
| Retail | 62,644 | 49,916 | 47,229 | 52,402 | ... | 5.0 | 8.7 |
| Restaurants & Bars | 6,054 | 5,313 | 5,484 | 5,737 | ... | 0.2 | 2.8 |
| Gasoline, EBR | 10,480 | 9,386 | 9,326 | 13,975 | ... | 23.5 | 15.4 |
| Gallons (000s) ADOT | 5,533 | 5,205 | 4,758 | 5,850 | ... | 0.9 | -0.7 |
| Contracting | 12,446 | 12,739 | 12,716 | 12,444 | ... | 42.4 | 17.7 |
| Hotel/Motel | 1,884 | 1,418 | 1,992 | 2,007 | ... | 4.2 | -0.5 |
| New Housing Units Authorized, Census C-40 | | | | | | | |
| Total Units | 48 | 22 | 12 | 47 | 50 | 13.6 | 22.4 |
| Single Family Units | 48 | 22 | 12 | 47 | 50 | 13.6 | 14.5 |

See sources and abbreviations at the bottom of page 16. • For additional detail and history, subscribe to *Arizona Economic Indicators Data Book*.

ARIZONA ECONOMIC INDICATORS

| | DEC 2004 | JAN 2005 | FEB 2005 | MAR 2005 | APR 2005 | % change versus year ago for most recent: | |
|--|-------------|-------------|-------------|-------------|-------------|--|-----------|
| | | | | | | month | 12-months |
| GRAHAM COUNTY | | | | | | | |
| Civilian Labor Force, ADES | 12,700 | 12,650 | 12,650 | 12,625 | 12,750 | 4.1 | 2.6 |
| Employment | 11,975 | 11,900 | 11,900 | 11,825 | 11,925 | 4.4 | 3.4 |
| Unemployment | 725 | 750 | 750 | 800 | 825 | 0.0 | -7.8 |
| Unemployment Rate (%) | 5.7 | 5.9 | 5.9 | 6.3 | 6.5 | -3.9 | -10.2 |
| Employees on Nonagricultural Payrolls, ADES | | | | | | | |
| Total | 7,850 | 7,700 | 7,850 | 7,850 | 7,825 | 6.5 | 6.8 |
| <i>Total Private</i> | 4,450 | 4,400 | 4,425 | 4,475 | 4,425 | -1.7 | -0.8 |
| Goods-Producing | 550 | 550 | 525 | 550 | 550 | 0.0 | 1.2 |
| Service-Providing | 7,300 | 7,150 | 7,325 | 7,300 | 7,275 | 7.0 | 7.3 |
| Trade, Transportation, and Utilities | 1,425 | 1,400 | 1,400 | 1,400 | 1,400 | -1.8 | -2.3 |
| Other Private Service-Providing | 2,475 | 2,450 | 2,500 | 2,525 | 2,475 | -2.0 | -0.4 |
| <i>Government</i> | 3,400 | 3,300 | 3,425 | 3,375 | 3,400 | 19.3 | 19.7 |
| Federal Government | 300 | 300 | 300 | 300 | 300 | -7.7 | -1.9 |
| State and Local Government | 3,100 | 3,000 | 3,125 | 3,075 | 3,100 | 22.8 | 22.6 |
| Sales (\$000s) ADOR | | | | | | | |
| Gross Retail | 19,771 | 15,204 | 15,883 | 18,390 | ... | 21.6 | 9.2 |
| Retail | 16,187 | 12,035 | 12,364 | 14,518 | ... | 21.4 | 7.3 |
| Restaurants & Bars | 1,682 | 1,413 | 1,636 | 1,574 | ... | 11.4 | 6.1 |
| Gasoline, EBR | 1,902 | 1,756 | 1,883 | 2,298 | ... | 31.5 | 26.3 |
| Gallons (000s) ADOT | 1,004 | 974 | 961 | 962 | ... | 7.5 | 9.0 |
| Contracting | 2,245 | 1,680 | 2,023 | 2,576 | ... | 2.1 | -13.9 |
| COCONINO COUNTY | | | | | | | |
| Civilian Labor Force, ADES | 67,400 | 67,300 | 67,500 | 67,300 | 67,900 | 2.0 | 2.9 |
| Employment | 64,100 | 63,600 | 64,000 | 63,800 | 64,500 | 2.4 | 3.5 |
| Unemployment | 3,300 | 3,700 | 3,500 | 3,500 | 3,400 | -5.6 | -7.8 |
| Unemployment Rate (%) | 4.9 | 5.5 | 5.2 | 5.2 | 5.0 | -7.4 | -10.4 |
| Employees on Nonagricultural Payrolls, ADES | | | | | | | |
| Total | 61,000 | 59,900 | 60,900 | 61,600 | 62,300 | 4.9 | 4.5 |
| <i>Total Private</i> | 42,200 | 41,500 | 41,900 | 42,600 | 43,700 | 7.1 | 6.5 |
| Goods-Producing | 7,100 | 7,200 | 7,200 | 7,300 | 7,500 | 19.0 | 16.9 |
| Mining and Construction | 3,600 | 3,600 | 3,600 | 3,700 | 3,800 | 15.2 | 18.5 |
| Manufacturing | 3,500 | 3,600 | 3,600 | 3,600 | 3,700 | 23.3 | 15.3 |
| Service-Providing | 53,900 | 52,700 | 53,700 | 54,300 | 54,800 | 3.2 | 3.1 |
| Trade, Transportation, and Utilities | 9,500 | 9,100 | 9,200 | 9,100 | 9,400 | 2.2 | 1.1 |
| Information | 500 | 500 | 500 | 500 | 500 | 0.0 | 9.1 |
| Financial Activities | 1,600 | 1,500 | 1,600 | 1,600 | 1,600 | 0.0 | 0.0 |
| Professional and Business Services | 3,300 | 3,300 | 3,300 | 3,500 | 3,500 | 2.9 | 6.8 |
| Educational and Health Services | 6,900 | 6,900 | 6,900 | 7,000 | 7,000 | 4.5 | 1.1 |
| Leisure and Hospitality | 11,500 | 11,200 | 11,400 | 11,800 | 12,400 | 9.7 | 9.5 |
| Other Services | 1,800 | 1,800 | 1,800 | 1,800 | 1,800 | 0.0 | 5.7 |
| <i>Government</i> | 18,800 | 18,400 | 19,000 | 19,000 | 18,600 | 0.0 | 0.4 |
| Federal Government | 3,100 | 3,000 | 2,900 | 3,000 | 3,000 | -6.3 | -4.0 |
| State and Local Government | 15,700 | 15,400 | 16,100 | 16,000 | 15,600 | 1.3 | 1.3 |
| Sales (\$000s) ADOR | | | | | | | |
| Gross Retail | 126,561 | 90,649 | 98,780 | 122,397 | ... | 6.6 | 6.8 |
| Retail | 91,594 | 61,335 | 66,495 | 77,069 | ... | 2.5 | 4.9 |
| Restaurants & Bars | 20,439 | 15,713 | 18,536 | 23,664 | ... | 10.9 | 6.7 |
| Gasoline, EBR | 14,528 | 13,602 | 13,749 | 21,664 | ... | 18.6 | 16.1 |
| Gallons (000s) ADOT | 7,670 | 7,543 | 7,015 | 9,068 | ... | -3.1 | 0.4 |
| Contracting | 25,568 | 15,901 | 17,424 | 22,779 | ... | 9.9 | -6.5 |
| Hotel/Motel | 9,988 | 6,536 | 7,818 | 14,829 | ... | 13.3 | 8.4 |
| New Housing Units Authorized, Census C-40 | | | | | | | |
| Total Units | 68 | 38 | 47 | 54 | 50 | -39.8 | -39.4 |
| Single Family Units | 68 | 33 | 47 | 54 | 48 | -42.2 | -18.0 |

See sources and abbreviations at the bottom of page 16. • For additional detail and history, subscribe to *Arizona Economic Indicators Data Book*.

| | DEC 2004 | JAN 2005 | FEB 2005 | MAR 2005 | APR 2005 | % change versus year ago for most recent: | |
|--|----------|----------|----------|----------|----------|---|-----------|
| | | | | | | month | 12-months |
| GREENLEE COUNTY | | | | | | | |
| Civilian Labor Force, ADES | | | | | | | |
| Employment | 3,600 | 3,625 | 3,625 | 3,600 | 3,625 | 3.6 | 1.7 |
| Unemployment | 3,450 | 3,425 | 3,425 | 3,400 | 3,425 | 3.8 | 3.4 |
| Unemployment Rate (%) | 150 | 200 | 200 | 200 | 200 | 0.0 | -20.7 |
| Unemployment Rate (%) | 4.2 | 5.5 | 5.5 | 5.6 | 5.5 | -3.4 | -22.0 |
| Employees on Nonagricultural Payrolls, ADES | | | | | | | |
| Total | 3,625 | 3,600 | 3,600 | 3,650 | 3,650 | 5.8 | 3.5 |
| <i>Total Private</i> | 3,100 | 3,075 | 3,100 | 3,125 | 3,125 | 7.8 | 4.4 |
| Goods-Producing | 2,575 | 2,550 | 2,575 | 2,600 | 2,600 | 9.5 | 6.9 |
| Service-Providing | 1,050 | 1,050 | 1,025 | 1,050 | 1,050 | -2.3 | -3.8 |
| Trade, Transportation, and Utilities | 225 | 225 | 225 | 225 | 250 | 11.1 | -0.9 |
| Other Private Service-Providing | 300 | 300 | 300 | 300 | 275 | -8.3 | -10.1 |
| <i>Government</i> | 525 | 525 | 500 | 525 | 525 | -4.5 | -1.2 |
| Federal Government | 50 | 50 | 25 | 50 | 50 | 0.0 | 9.5 |
| State and Local Government | 475 | 475 | 475 | 475 | 475 | -5.0 | -2.1 |
| Sales (\$000s) ADOR | | | | | | | |
| Gross Retail | 8,616 | 7,761 | 8,343 | 9,313 | ... | 28.5 | 30.7 |
| Retail | 7,866 | 7,130 | 7,627 | 8,405 | ... | 27.9 | 31.7 |
| Restaurants & Bars | 247 | 181 | 196 | 236 | ... | 0.7 | -0.3 |
| Gasoline, EBR | 503 | 450 | 519 | 672 | ... | 53.3 | 32.6 |
| Gallons (000s) ADOT | 265 | 250 | 265 | 281 | ... | 25.3 | 14.5 |
| Contracting | 286 | -2,084 | 270 | 320 | ... | -79.3 | -43.5 |
| Hotel/Motel* | 256 | 511 | 364 | 240 | ... | -35.8 | 7.7 |
| * Includes Graham County data. | | | | | | | |
| YAVAPAI COUNTY | | | | | | | |
| Civilian Labor Force, ADES | | | | | | | |
| Employment | 88,400 | 88,500 | 88,600 | 88,100 | 89,500 | 3.0 | 4.0 |
| Unemployment | 85,200 | 85,100 | 85,100 | 84,500 | 85,800 | 3.1 | 4.7 |
| Unemployment Rate (%) | 3,200 | 3,400 | 3,500 | 3,600 | 3,700 | 0.0 | -10.5 |
| Unemployment Rate (%) | 3.6 | 3.8 | 4.0 | 4.1 | 4.1 | -2.9 | -13.9 |
| Employees on Nonagricultural Payrolls, ADES | | | | | | | |
| Total | 57,500 | 56,500 | 57,100 | 57,800 | 58,500 | 4.8 | 5.6 |
| <i>Total Private</i> | 46,600 | 46,000 | 46,000 | 46,800 | 47,400 | 5.3 | 6.4 |
| Goods-Producing | 10,800 | 10,500 | 10,500 | 10,700 | 10,800 | 2.9 | 9.6 |
| Mining and Construction | 7,500 | 7,200 | 7,200 | 7,400 | 7,500 | 4.2 | 12.4 |
| Manufacturing | 3,300 | 3,300 | 3,300 | 3,300 | 3,300 | 0.0 | 3.9 |
| Service-Providing | 46,700 | 46,000 | 46,600 | 47,100 | 47,700 | 5.3 | 4.7 |
| Trade, Transportation, and Utilities | 11,500 | 11,600 | 11,500 | 11,600 | 11,500 | 9.5 | 8.9 |
| Information | 700 | 700 | 700 | 700 | 700 | 0.0 | 3.7 |
| Financial Activities | 1,900 | 1,900 | 1,900 | 1,900 | 1,900 | 0.0 | 1.3 |
| Professional and Business Services | 4,100 | 4,000 | 4,000 | 4,200 | 4,200 | 5.0 | 4.6 |
| Educational and Health Services | 8,300 | 8,300 | 8,300 | 8,400 | 8,500 | 4.9 | 2.5 |
| Leisure and Hospitality | 7,400 | 7,200 | 7,300 | 7,500 | 8,000 | 6.7 | 7.1 |
| Other Services | 1,900 | 1,800 | 1,800 | 1,800 | 1,800 | 0.0 | -0.5 |
| <i>Government</i> | 10,900 | 10,500 | 11,100 | 11,000 | 11,100 | 2.8 | 2.4 |
| Federal Government | 1,300 | 1,300 | 1,200 | 1,200 | 1,300 | 8.3 | 2.7 |
| State and Local Government | 9,600 | 9,200 | 9,900 | 9,800 | 9,800 | 2.1 | 2.3 |
| Sales (\$000s) ADOR | | | | | | | |
| Gross Retail | 176,457 | 126,180 | 140,056 | 161,868 | ... | 13.3 | 10.1 |
| Retail | 143,324 | 97,902 | 109,079 | 122,361 | ... | 13.0 | 10.9 |
| Restaurants & Bars | 19,959 | 16,157 | 18,930 | 20,767 | ... | 9.9 | 1.8 |
| Gasoline, EBR | 13,174 | 12,121 | 12,047 | 18,740 | ... | 19.6 | 15.4 |
| Gallons (000s) ADOT | 6,955 | 6,722 | 6,147 | 7,844 | ... | -2.3 | -0.2 |
| Contracting | 57,219 | 43,635 | 46,014 | 58,286 | ... | 32.9 | 16.8 |
| Hotel/Motel | 5,241 | 4,156 | 5,656 | 8,893 | ... | 22.9 | 0.3 |
| New Housing Units Authorized, Census C-40 | | | | | | | |
| Total Units | 273 | 251 | 236 | 308 | 308 | 24.2 | 24.1 |
| Single Family Units | 268 | 247 | 227 | 297 | 304 | 35.1 | 25.2 |

See sources and abbreviations at the bottom of page 16. • For additional detail and history, subscribe to *Arizona Economic Indicators Data Book*.

ARIZONA ECONOMIC INDICATORS

| | DEC 2004 | JAN 2005 | FEB 2005 | MAR 2005 | APR 2005 | % change versus year ago for most recent: | |
|--|-------------|-------------|-------------|-------------|-------------|--|-----------|
| | | | | | | month | 12-months |
| GILA COUNTY | | | | | | | |
| Civilian Labor Force, ADES | | | | | | | |
| Employment | 19,900 | 20,050 | 19,875 | 19,875 | 20,175 | -2.8 | -2.4 |
| Unemployment | 1,150 | 1,200 | 1,225 | 1,250 | 1,250 | -7.4 | -12.9 |
| Unemployment Rate (%) | 5.8 | 6.0 | 6.2 | 6.3 | 6.2 | -4.8 | -10.8 |
| Employees on Nonagricultural Payrolls, ADES | | | | | | | |
| Total | 13,400 | 13,325 | 13,325 | 13,525 | 13,725 | -1.1 | -1.0 |
| <i>Total Private</i> | 8,650 | 8,575 | 8,575 | 8,725 | 8,850 | -0.3 | -0.2 |
| Goods-Producing | 2,000 | 1,975 | 1,975 | 2,000 | 2,050 | 0.0 | -1.4 |
| Service-Providing | 11,400 | 11,350 | 11,350 | 11,525 | 11,675 | -1.3 | -1.0 |
| Trade, Transportation, and Utilities | 2,100 | 2,100 | 2,100 | 2,200 | 2,250 | 4.7 | 1.8 |
| Other Private Service-Providing | 4,550 | 4,500 | 4,500 | 4,525 | 4,550 | -2.7 | -0.6 |
| <i>Government</i> | 4,750 | 4,750 | 4,750 | 4,800 | 4,875 | -2.5 | -2.5 |
| Federal Government | 450 | 450 | 450 | 450 | 475 | -5.0 | -6.2 |
| State and Local Government | 4,300 | 4,300 | 4,300 | 4,350 | 4,400 | -2.2 | -2.1 |
| Sales (\$000s) ADOR | | | | | | | |
| Gross Retail | 34,408 | 24,566 | 26,379 | 32,184 | ... | 10.7 | 6.2 |
| Retail | 25,242 | 16,936 | 18,509 | 21,063 | ... | 6.8 | 2.5 |
| Restaurants & Bars | 4,276 | 3,609 | 3,808 | 4,100 | ... | -7.0 | 3.6 |
| Gasoline, EBR | 4,890 | 4,021 | 4,062 | 7,021 | ... | 42.2 | 25.2 |
| Gallons (000s) ADOT | 2,582 | 2,230 | 2,072 | 2,939 | ... | 16.2 | 8.4 |
| Contracting | 9,863 | 6,118 | 10,577 | 5,791 | ... | -32.1 | -0.3 |
| Hotel/Motel | 680 | 719 | 843 | 910 | ... | -0.0 | 3.3 |
| MOHAVE COUNTY | | | | | | | |
| Civilian Labor Force, ADES | | | | | | | |
| Employment | 83,475 | 84,625 | 84,225 | 85,400 | 86,475 | 3.8 | 3.1 |
| Unemployment | 2,875 | 3,200 | 3,275 | 3,425 | 3,425 | -3.5 | -12.2 |
| Unemployment Rate (%) | 3.4 | 3.8 | 3.9 | 4.0 | 4.0 | -7.1 | -14.8 |
| Employees on Nonagricultural Payrolls, ADES | | | | | | | |
| Total | 50,100 | 50,025 | 50,300 | 50,950 | 51,400 | 3.9 | 3.6 |
| <i>Total Private</i> | 42,650 | 42,600 | 42,775 | 43,325 | 43,850 | 6.0 | 5.0 |
| Goods-Producing | 9,800 | 9,925 | 9,875 | 9,975 | 10,150 | 3.0 | 4.8 |
| Mining and Construction | 6,075 | 6,175 | 6,125 | 6,250 | 6,350 | 0.8 | 2.8 |
| Manufacturing | 3,725 | 3,750 | 3,750 | 3,725 | 3,800 | 7.0 | 8.2 |
| Service-Providing | 40,300 | 40,100 | 40,425 | 40,975 | 41,250 | 4.2 | 3.3 |
| Trade, Transportation, and Utilities | 11,600 | 11,275 | 11,350 | 11,375 | 11,525 | 8.2 | 5.7 |
| Information | 800 | 775 | 775 | 775 | 775 | -6.1 | -5.1 |
| Financial Activities | 2,025 | 2,025 | 2,075 | 2,100 | 2,175 | 11.5 | 7.1 |
| Professional and Business Services | 3,800 | 3,875 | 3,750 | 3,850 | 3,925 | 11.3 | 6.6 |
| Educational and Health Services | 6,450 | 6,575 | 6,675 | 6,625 | 6,600 | 6.5 | 6.7 |
| Leisure and Hospitality | 5,950 | 5,925 | 6,025 | 6,350 | 6,425 | 5.3 | 3.9 |
| Other Services | 2,225 | 2,225 | 2,250 | 2,275 | 2,275 | 0.0 | 0.3 |
| <i>Government</i> | 7,450 | 7,425 | 7,525 | 7,625 | 7,550 | -6.5 | -3.7 |
| Federal Government | 525 | 500 | 525 | 525 | 525 | 0.0 | 1.6 |
| State and Local Government | 6,925 | 6,925 | 7,000 | 7,100 | 7,025 | -7.0 | -4.1 |
| Sales (\$000s) ADOR | | | | | | | |
| Gross Retail | 168,579 | 133,424 | 142,285 | 170,860 | ... | 15.4 | 14.3 |
| Retail | 133,560 | 103,027 | 109,583 | 125,923 | ... | 11.4 | 12.2 |
| Restaurants & Bars | 16,168 | 14,623 | 15,959 | 17,924 | ... | 19.6 | 12.9 |
| Gasoline, EBR | 18,852 | 15,774 | 16,743 | 27,013 | ... | 35.2 | 28.6 |
| Gallons (000s) ADOT | 9,953 | 8,748 | 8,542 | 11,307 | ... | 10.5 | 11.3 |
| Contracting | 53,101 | 40,361 | 47,040 | 58,954 | ... | 44.3 | 49.0 |
| Hotel/Motel | 2,356 | 2,506 | 3,104 | 4,740 | ... | 20.5 | 11.6 |
| New Housing Units Authorized, Census C-40 | | | | | | | |
| Total Units | 310 | 308 | 335 | 371 | 385 | 30.5 | 19.4 |
| Single Family Units | 304 | 285 | 297 | 360 | 371 | 33.9 | 24.9 |

See sources and abbreviations at the bottom of page 16. • For additional detail and history, subscribe to *Arizona Economic Indicators Data Book*.

ARIZONA ECONOMIC INDICATORS

| | DEC 2004 | JAN 2005 | FEB 2005 | MAR 2005 | APR 2005 | % change versus year ago for most recent: | |
|--|-------------|-------------|-------------|-------------|-------------|--|-----------|
| | | | | | | month | 12-months |
| LA PAZ COUNTY | | | | | | | |
| Civilian Labor Force, ADES | | | | | | | |
| Employment | 7,125 | 7,300 | 7,275 | 7,500 | 7,550 | 3.4 | -0.7 |
| Unemployment | 6,675 | 6,825 | 6,800 | 7,000 | 7,050 | 3.7 | -0.3 |
| Unemployment Rate (%) | 450 | 475 | 475 | 500 | 500 | 0.0 | -6.8 |
| Unemployment Rate (%) | 6.3 | 6.5 | 6.5 | 6.7 | 6.6 | -3.3 | -6.1 |
| Employees on Nonagricultural Payrolls, ADES | | | | | | | |
| Total | 5,150 | 5,250 | 5,275 | 5,350 | 5,300 | 1.9 | 2.9 |
| <i>Total Private</i> | 2,850 | 2,975 | 3,025 | 3,100 | 3,075 | 7.0 | 6.2 |
| Goods-Producing | 350 | 350 | 350 | 400 | 450 | 5.9 | 4.0 |
| Service-Providing | 4,800 | 4,900 | 4,925 | 4,950 | 4,850 | 1.6 | 2.8 |
| Trade, Transportation, and Utilities | 1,275 | 1,300 | 1,325 | 1,300 | 1,325 | 3.9 | 3.5 |
| Other Private Service-Providing | 1,225 | 1,325 | 1,350 | 1,400 | 1,300 | 10.6 | 9.8 |
| <i>Government</i> | 2,300 | 2,275 | 2,250 | 2,250 | 2,225 | -4.3 | -1.0 |
| Federal Government | 225 | 200 | 200 | 200 | 200 | 0.0 | 3.2 |
| State and Local Government | 2,075 | 2,075 | 2,050 | 2,050 | 2,025 | -4.7 | -1.4 |
| Sales (\$000s) ADOR | | | | | | | |
| Gross Retail | 19,033 | 24,730 | 24,876 | 23,689 | ... | 25.1 | 16.9 |
| Retail | 11,456 | 16,904 | 15,558 | 11,506 | ... | 6.1 | 12.3 |
| Restaurants & Bars | 2,362 | 2,356 | 2,800 | 4,366 | ... | 77.3 | 8.9 |
| Gasoline, EBR | 5,215 | 5,470 | 6,518 | 7,817 | ... | 38.8 | 29.6 |
| Gallons (000s) ADOT | 2,753 | 3,033 | 3,326 | 3,272 | ... | 13.4 | 12.0 |
| Contracting | 1,562 | 1,432 | 1,325 | 1,229 | ... | -69.7 | -17.6 |
| Hotel/Motel | 407 | 299 | 817 | 527 | ... | 9.2 | 4.5 |
| YUMA METROPOLITAN REGION | | | | | | | |
| Civilian Labor Force, ADES | | | | | | | |
| Employment | 75,000 | 73,800 | 73,800 | 76,000 | 77,400 | 9.5 | 2.7 |
| Unemployment | 66,700 | 66,500 | 66,600 | 68,100 | 65,700 | 10.8 | 4.6 |
| Unemployment Rate (%) | 8,300 | 7,300 | 7,200 | 7,900 | 11,700 | 2.6 | -6.5 |
| Unemployment Rate (%) | 11.1 | 9.9 | 9.8 | 10.4 | 15.1 | -6.3 | -9.0 |
| Employees on Nonagricultural Payrolls, ADES | | | | | | | |
| Total | 54,000 | 53,500 | 54,400 | 54,900 | 52,200 | 10.8 | 8.4 |
| <i>Total Private</i> | 39,400 | 39,300 | 39,500 | 40,000 | 37,400 | 11.6 | 8.3 |
| Goods-Producing | 8,100 | 8,000 | 8,100 | 8,100 | 7,300 | 12.3 | 15.6 |
| Mining and Construction | 4,800 | 4,700 | 4,800 | 4,900 | 5,000 | 22.0 | 22.5 |
| Manufacturing | 3,300 | 3,300 | 3,300 | 3,200 | 2,300 | -4.2 | 5.6 |
| Service-Providing | 45,900 | 45,500 | 46,300 | 46,800 | 44,900 | 10.6 | 7.2 |
| Trade, Transportation, and Utilities | 11,900 | 11,900 | 11,900 | 12,000 | 10,400 | 15.6 | 10.7 |
| Information | 1,200 | 1,200 | 1,200 | 1,200 | 1,200 | 9.1 | 6.9 |
| Financial Activities | 1,400 | 1,400 | 1,400 | 1,500 | 1,500 | 7.1 | 4.3 |
| Professional and Business Services | 3,400 | 3,300 | 3,300 | 3,400 | 3,400 | 3.0 | -8.9 |
| Educational and Health Services | 6,300 | 6,400 | 6,400 | 6,500 | 6,400 | 10.3 | 9.0 |
| Leisure and Hospitality | 5,400 | 5,400 | 5,500 | 5,600 | 5,500 | 12.2 | 7.2 |
| Other Services | 1,700 | 1,700 | 1,700 | 1,700 | 1,700 | 13.3 | 7.8 |
| <i>Government</i> | 14,600 | 14,200 | 14,900 | 14,900 | 14,800 | 8.8 | 8.7 |
| Federal Government | 2,900 | 2,900 | 2,900 | 3,000 | 3,000 | 3.4 | 3.6 |
| State and Local Government | 11,700 | 11,300 | 12,000 | 11,900 | 11,800 | 10.3 | 10.1 |
| Sales (\$000s) ADOR | | | | | | | |
| Gross Retail | 169,186 | 134,774 | 146,184 | 161,689 | ... | 19.9 | 13.8 |
| Retail | 134,462 | 104,096 | 111,468 | 121,142 | ... | 17.5 | 13.1 |
| Restaurants & Bars | 16,051 | 14,139 | 17,570 | 16,603 | ... | 14.6 | 11.6 |
| Gasoline, EBR | 18,673 | 16,539 | 17,147 | 23,943 | ... | 38.4 | 20.2 |
| Gallons (000s) ADOT | 9,858 | 9,172 | 8,749 | 10,022 | ... | 13.1 | 3.7 |
| Contracting | 32,410 | 31,418 | 37,864 | 39,148 | ... | 30.4 | 33.7 |
| Hotel/Motel | 2,887 | 3,579 | 4,842 | 4,339 | ... | 18.0 | 6.2 |
| New Housing Units Authorized, Census C-40 | | | | | | | |
| Total Units | 169 | 148 | 141 | 159 | 219 | -25.3 | 2.2 |
| Single Family Units | 169 | 146 | 141 | 159 | 214 | -27.0 | -4.9 |

See sources and abbreviations at the bottom of page 16. • For additional detail and history, subscribe to *Arizona Economic Indicators Data Book*.

ARIZONA ECONOMIC INDICATORS

| | DEC 2004 | JAN 2005 | FEB 2005 | MAR 2005 | APR 2005 | % change versus year ago for most recent: | |
|--|-------------|-------------|-------------|-------------|-------------|--|-----------|
| | | | | | | month | 12-months |
| SANTA CRUZ COUNTY | | | | | | | |
| Civilian Labor Force, ADES | 16,050 | 16,125 | 16,025 | 15,825 | 15,825 | 1.4 | 1.2 |
| Employment | 14,850 | 15,000 | 14,900 | 14,675 | 14,700 | 2.4 | 1.9 |
| Unemployment | 1,200 | 1,125 | 1,125 | 1,150 | 1,125 | -10.0 | -5.2 |
| Unemployment Rate (%) | 7.5 | 7.0 | 7.0 | 7.3 | 7.1 | -11.3 | -6.3 |
| Employees on Nonagricultural Payrolls, ADES | | | | | | | |
| Total | 13,050 | 13,025 | 13,100 | 13,075 | 13,025 | 4.2 | 3.1 |
| <i>Total Private</i> | 9,775 | 9,775 | 9,800 | 9,800 | 9,725 | 7.2 | 4.9 |
| Goods-Producing | 1,025 | 1,025 | 1,025 | 1,025 | 1,025 | 2.5 | -7.9 |
| Service-Providing | 12,025 | 12,000 | 12,075 | 12,050 | 12,000 | 4.3 | 4.2 |
| Trade, Transportation, and Utilities | 5,475 | 5,475 | 5,450 | 5,425 | 5,350 | 10.3 | 6.0 |
| Other Private Service-Providing | 3,275 | 3,275 | 3,325 | 3,350 | 3,350 | 3.9 | 7.8 |
| <i>Government</i> | 3,275 | 3,250 | 3,300 | 3,275 | 3,300 | -3.6 | -1.7 |
| Federal Government | 1,150 | 1,125 | 1,175 | 1,150 | 1,175 | 0.0 | 2.9 |
| State and Local Government | 2,125 | 2,125 | 2,125 | 2,125 | 2,125 | -5.6 | -4.1 |
| Sales (\$000s) ADOR | | | | | | | |
| Gross Retail | 52,364 | 30,499 | 34,084 | 40,849 | ... | 18.8 | 9.3 |
| Retail | 41,856 | 22,866 | 25,673 | 30,345 | ... | 15.7 | 8.2 |
| Restaurants & Bars | 3,900 | 2,955 | 3,456 | 3,650 | ... | 33.5 | 6.8 |
| Gasoline, EBR | 6,608 | 4,678 | 4,955 | 6,854 | ... | 25.9 | 17.2 |
| Gallons (000s) ADOT | 3,489 | 2,594 | 2,528 | 2,869 | ... | 2.9 | 0.9 |
| Contracting | -1,744 | 4,925 | 5,374 | 5,410 | ... | 16.6 | -13.4 |
| Hotel/Motel | 801 | 1,107 | 1,563 | 1,397 | ... | 79.0 | 28.1 |
| New Housing Units Authorized, Census C-40 | | | | | | | |
| Total Units | 58 | 35 | 38 | 59 | 53 | 47.2 | 21.4 |
| Single Family Units | 58 | 35 | 38 | 59 | 50 | 38.9 | 21.5 |
| COCHISE COUNTY | | | | | | | |
| Civilian Labor Force, ADES | 55,450 | 55,575 | 55,425 | 55,150 | 55,425 | 2.1 | 1.7 |
| Employment | 53,150 | 53,100 | 52,825 | 52,450 | 52,700 | 2.3 | 2.4 |
| Unemployment | 2,300 | 2,475 | 2,600 | 2,700 | 2,725 | -1.8 | -11.3 |
| Unemployment Rate (%) | 4.1 | 4.5 | 4.7 | 4.9 | 4.9 | -3.8 | -12.8 |
| Employees on Nonagricultural Payrolls, ADES | | | | | | | |
| Total | 36,300 | 35,825 | 36,075 | 36,300 | 36,300 | 4.0 | 3.6 |
| <i>Total Private</i> | 24,475 | 24,175 | 24,200 | 24,525 | 24,550 | 5.6 | 3.9 |
| Goods-Producing | 3,625 | 3,575 | 3,600 | 3,725 | 3,775 | 12.7 | 8.7 |
| Mining and Construction | 2,800 | 2,750 | 2,775 | 2,900 | 2,975 | 19.0 | 10.2 |
| Manufacturing | 825 | 825 | 20,600 | 20,800 | 800 | -5.9 | 402.8 |
| Service-Providing | 32,675 | 32,250 | 6,450 | 6,350 | 32,525 | 3.1 | -10.9 |
| Trade, Transportation, and Utilities | 6,725 | 6,475 | 925 | 900 | 6,225 | 1.6 | -12.2 |
| Information | 525 | 525 | 3,575 | 3,800 | 525 | 0.0 | 119.1 |
| Financial Activities | 900 | 925 | 3,850 | 3,900 | 900 | 0.0 | 55.3 |
| Professional and Business Services | 3,600 | 3,575 | 4,175 | 4,200 | 3,850 | 9.2 | 1.9 |
| Educational and Health Services | 3,875 | 3,875 | 1,100 | 1,125 | 3,975 | 6.7 | -7.0 |
| Leisure and Hospitality | 4,100 | 4,125 | 11,875 | 11,775 | 4,200 | 4.3 | 38.3 |
| Other Services | 1,125 | 1,100 | 4,800 | 4,825 | 1,100 | 2.3 | 57.6 |
| <i>Government</i> | 11,825 | 11,650 | 7,075 | 6,950 | 11,750 | 0.9 | -4.1 |
| Federal Government | 4,825 | 4,775 | 4,800 | 4,825 | 4,850 | 2.1 | 3.2 |
| State and Local Government | 7,000 | 6,875 | 7,075 | 6,950 | 6,900 | 0.0 | 2.8 |
| Sales (\$000) ADOR | | | | | | | |
| Gross Retail | 98,305 | 65,032 | 74,902 | 86,990 | ... | 7.9 | 6.5 |
| Retail | 77,122 | 46,233 | 54,327 | 65,904 | ... | 9.4 | 0.6 |
| Restaurants & Bars | 9,335 | 8,144 | 9,458 | 9,480 | ... | -4.5 | 14.4 |
| Gasoline, EBR | 11,848 | 10,655 | 11,116 | 11,606 | ... | 10.6 | 43.3 |
| Gallons (000s) ADOT | 6,255 | 5,909 | 5,671 | 4,858 | ... | -9.7 | 24.4 |
| Contracting | 23,658 | 13,425 | 15,748 | 19,480 | ... | 10.7 | -0.6 |
| Hotel/Motel | 2,315 | 2,407 | 3,332 | 3,585 | ... | 1.1 | 8.3 |
| New Housing Units Authorized, Census C-40 | | | | | | | |
| Total Units | 76 | 70 | 79 | 180 | 125 | 38.9 | 43.5 |
| Single Family Units | 76 | 70 | 79 | 180 | 125 | 50.6 | 43.7 |

See sources and abbreviations at the bottom of page 16. • For additional detail and history, subscribe to *Arizona Economic Indicators Data Book*.

| | DEC 2004 | JAN 2005 | FEB 2005 | MAR 2005 | APR 2005 | % change versus year ago for most recent: | |
|--|-----------|----------|----------|----------|----------|---|-----------|
| | | | | | | month | 12-months |
| TUCSON METROPOLITAN REGION (PIMA) | | | | | | | |
| Civilian Labor Force (000s) ADES | | | | | | | |
| Employment | 449.8 | 447.4 | 448.5 | 444.5 | 447.9 | 1.1 | 2.1 |
| Unemployment | 432.4 | 429.0 | 429.9 | 425.1 | 428.2 | 1.3 | 2.8 |
| Unemployment Rate, Seas. Adj. (%) | 17.4 | 18.4 | 18.6 | 19.4 | 19.7 | -2.5 | -11.5 |
| | 4.1 | 3.8 | 4.1 | 4.3 | 4.7 | -2.1 | -13.0 |
| Employees on Nonagricultural Payrolls (000s) ADES | | | | | | | |
| Total | 371.6 | 363.8 | 368.7 | 371.1 | 373.1 | 3.5 | 3.3 |
| Natural Resources and Mining | 1.4 | 1.4 | 1.5 | 1.5 | 1.5 | 15.4 | 15.2 |
| Construction | 24.9 | 24.8 | 24.8 | 25.6 | 25.8 | 9.3 | 6.0 |
| Manufacturing | 28.3 | 28.3 | 28.4 | 28.3 | 28.1 | -0.7 | -0.4 |
| Computer and Electronic Prod. | 4.9 | 4.9 | 4.9 | 4.9 | 4.8 | -4.0 | -4.3 |
| Aerospace Products and Parts | 11.1 | 11.0 | 11.3 | 11.1 | 11.0 | -2.7 | -2.0 |
| Wholesale Trade | 8.4 | 8.2 | 8.3 | 8.4 | 8.4 | 3.7 | 10.8 |
| Retail Trade | 45.1 | 41.9 | 41.9 | 42.1 | 42.2 | 3.4 | 4.5 |
| Transp., Warehousing, and Utilities | 8.6 | 8.4 | 8.4 | 8.4 | 8.4 | 2.4 | 4.3 |
| Information | 7.4 | 7.3 | 7.3 | 7.2 | 7.2 | -4.0 | -1.5 |
| Financial Activities | 17.8 | 17.7 | 17.9 | 17.9 | 18.2 | 11.0 | 8.3 |
| Professional and Business Services | 42.3 | 42.1 | 42.5 | 43.2 | 43.7 | 2.3 | 2.4 |
| Educational and Health Services | 49.3 | 49.3 | 49.3 | 49.3 | 49.6 | 5.3 | 5.0 |
| Arts, Entertainment, and Recreation | 5.1 | 5.2 | 5.4 | 5.6 | 5.6 | 1.8 | 1.3 |
| Accommodation | 8.1 | 8.2 | 8.3 | 8.3 | 8.3 | 10.7 | 6.0 |
| Food Svcs and Drinking Places | 27.0 | 26.7 | 27.1 | 27.4 | 27.6 | 3.4 | 3.7 |
| Other Services | 15.0 | 14.6 | 14.8 | 14.9 | 15.1 | 1.3 | 1.7 |
| Federal Government | 10.1 | 10.1 | 10.1 | 10.2 | 10.2 | 5.2 | 3.8 |
| State and Local Government | 72.8 | 69.6 | 72.7 | 72.8 | 73.2 | 1.2 | 0.9 |
| State and Local Government Education | 48.8 | 45.5 | 48.4 | 48.3 | 48.4 | 1.5 | 1.5 |
| Sales (\$000s) ADOR | | | | | | | |
| Aggregate Retail Sales | 1,063,179 | 804,156 | 849,662 | 950,443 | ... | 8.2 | 7.0 |
| Retail | 769,887 | 522,489 | 555,063 | 620,271 | ... | 4.6 | 5.3 |
| Food, EBR | 118,262 | 120,255 | 121,397 | 122,211 | ... | 10.1 | 7.2 |
| Restaurants & Bars | 109,727 | 102,764 | 111,176 | 119,506 | ... | 11.2 | 10.8 |
| Gasoline, EBR | 65,303 | 58,648 | 62,027 | 88,455 | ... | 32.2 | 16.6 |
| Contracting | 177,892 | 141,368 | 145,529 | 170,903 | ... | 10.5 | 10.2 |
| Hotel/Motel | 22,429 | 32,424 | 43,208 | 45,611 | ... | 21.0 | 10.1 |
| New Housing Units Authorized, Census C-40 adjusted by EBR | | | | | | | |
| Total Units | 748 | 720 | 835 | 1,185 | 1,083 | 40.7 | 25.3 |
| Single Family Units | 709 | 675 | 770 | 1,044 | 953 | 37.3 | 19.2 |
| 2-5-plus Unit Structures | 39 | 44 | 65 | 141 | 130 | 72.2 | 104.7 |
| Housing Sales and Prices, TAR | | | | | | | |
| Total Sales (\$000s) | 273,531 | 249,161 | 314,570 | 363,510 | 367,270 | 18.1 | 34.6 |
| Total Units | 1,283 | 1,086 | 1,343 | 1,525 | 1,489 | -1.1 | 16.0 |
| Average Price (\$) | 213,196 | 229,430 | 234,230 | 238,367 | 246,656 | 19.4 | 16.7 |
| Tucson International Airport, TAA | | | | | | | |
| Total Passengers | 332,506 | 314,756 | 333,817 | 400,962 | 355,826 | 4.6 | 8.0 |
| Total Aircraft Movements | 20,128 | 19,983 | 20,689 | 24,539 | 24,091 | 13.4 | 4.9 |

TUCSON METROPOLITAN REGION (PIMA COUNTY) - QUARTERLY DATA

| | I 2004 | II 2004 | III 2004 | IV 2004 | I 2005 | % change versus year ago for most recent: | |
|--|--------|---------|----------|---------|--------|---|------------|
| | | | | | | quarter | 4-quarters |
| Demographics & Vital Statistics (000s, seas adj) ADHS & EBR | | | | | | | |
| Population | 922.9 | 928.4 | 934.5 | 940.9 | 947.3 | 2.6 | 2.4 |
| Natural Increase | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 0.1 | 3.3 |
| Births | 3.2 | 3.2 | 3.2 | 3.3 | 3.3 | 1.4 | 2.4 |
| Deaths | 1.9 | 1.9 | 1.9 | 2.0 | 2.0 | 2.3 | 1.9 |
| Net Migration | 3.7 | 4.3 | 4.8 | 5.1 | 5.1 | 37.0 | 33.1 |
| Personal Income by Source (\$mil, SAAR) EBR | | | | | | | |
| Total Personal Income | 23,833 | 24,248 | 24,691 | 25,162 | 25,626 | 7.5 | 6.6 |
| Earnings by Place of Work | 16,420 | 16,717 | 17,044 | 17,406 | 17,764 | 8.2 | 6.8 |
| Less: Contributions for Social Insurance | 1,865 | 1,904 | 1,945 | 1,986 | 2,026 | 8.7 | 7.9 |
| Plus: Adjustment for Residence | 112 | 114 | 116 | 119 | 122 | 8.7 | 7.0 |
| Plus: Dividends, Interest & Rents | 4,770 | 4,855 | 4,937 | 5,012 | 5,084 | 6.6 | 6.2 |
| Plus: Transfer Payments | 4,396 | 4,467 | 4,538 | 4,611 | 4,683 | 6.5 | 6.5 |
| Per Capita Personal Income (\$, SAAR) EBR | 25,825 | 26,117 | 26,420 | 26,741 | 27,051 | 4.7 | 4.1 |

ARIZONA ECONOMIC INDICATORS

| | DEC 2004 | JAN 2005 | FEB 2005 | MAR 2005 | APR 2005 | % change versus year ago for most recent: month 12-months | |
|--|-------------|-------------|-------------|-------------|-------------|---|-------|
| PHOENIX-MESA METROPOLITAN REGION (MARICOPA AND PINAL) | | | | | | | |
| Civilian Labor Force (000s) ADES | | | | | | | |
| Employment | 1,861.6 | 1,859.6 | 1,859.9 | 1,868.5 | 1,883.3 | 2.6 | 2.4 |
| Unemployment | 1,791.9 | 1,785.2 | 1,785.4 | 1,790.2 | 1,804.3 | 2.9 | 3.3 |
| Unemployment Rate, Seas. Adj. (%) | 69.7 | 74.4 | 74.5 | 78.3 | 79.0 | -4.1 | -14.2 |
| | 4.0 | 3.7 | 4.0 | 4.2 | 4.4 | -6.4 | -15.7 |
| Employees on Nonagricultural Payrolls (000s) ADES | | | | | | | |
| Total | 1,728.6 | 1,699.4 | 1,716.7 | 1,728.7 | 1,736.8 | 3.8 | 3.8 |
| Natural Resources and Mining | 2.2 | 2.2 | 2.2 | 2.2 | 2.3 | 15.0 | 9.8 |
| Construction | 147.1 | 145.1 | 146.6 | 150.2 | 152.6 | 12.1 | 9.7 |
| Durable Goods | 103.2 | 103.0 | 103.1 | 103.1 | 103.3 | -0.3 | 0.0 |
| Fabricated Metal Products | 13.5 | 13.4 | 13.5 | 13.5 | 13.5 | 3.1 | 4.3 |
| Computer and Electronic Prod. | 37.9 | 37.5 | 37.5 | 37.6 | 37.7 | -2.6 | -2.0 |
| Aerospace Products and Parts | 15.0 | 15.0 | 15.1 | 15.2 | 15.2 | 5.6 | 2.7 |
| Non-Durable Goods | 27.0 | 26.8 | 26.9 | 27.1 | 27.2 | 0.7 | -0.0 |
| Wholesale Trade | 79.2 | 78.8 | 79.0 | 79.0 | 79.0 | 0.8 | 1.6 |
| Retail Trade | 217.6 | 210.8 | 208.1 | 208.7 | 209.0 | 5.6 | 5.2 |
| Utilities | 7.9 | 7.9 | 7.9 | 7.8 | 7.8 | -1.3 | 0.0 |
| Transportation and Warehousing | 52.8 | 52.5 | 52.7 | 52.9 | 52.9 | 1.1 | 2.3 |
| Information | 34.4 | 34.4 | 34.0 | 34.3 | 34.0 | -7.9 | -5.3 |
| Finance and Insurance | 105.0 | 103.7 | 105.1 | 105.5 | 106.3 | 2.5 | 2.2 |
| Real Estate, Rental, and Leasing | 35.0 | 34.3 | 34.4 | 34.6 | 34.8 | 2.1 | 3.1 |
| Professional and Business Services | 279.3 | 272.4 | 276.1 | 278.1 | 280.3 | 4.0 | 5.3 |
| Educational Services | 29.7 | 29.6 | 30.2 | 30.4 | 31.3 | 13.0 | 13.6 |
| Health Care and Social Assistance | 147.5 | 148.3 | 148.9 | 149.8 | 150.2 | 4.3 | 4.2 |
| Arts, Entertainment, and Recreation | 21.6 | 21.6 | 22.3 | 22.8 | 22.8 | 4.1 | 2.7 |
| Accommodation | 27.5 | 28.0 | 28.1 | 27.9 | 28.4 | 2.9 | 2.4 |
| Food Svcs and Drinking Places | 115.2 | 113.9 | 116.0 | 118.2 | 118.1 | 3.8 | 3.6 |
| Other Services | 64.9 | 63.7 | 64.0 | 64.6 | 63.8 | 0.5 | 1.4 |
| Federal Government | 22.7 | 22.0 | 22.0 | 22.1 | 22.0 | 1.9 | 1.8 |
| State and Local Government | 208.8 | 200.4 | 211.5 | 209.4 | 210.7 | 3.3 | 3.1 |
| State and Local Government Education | 110.4 | 101.2 | 112.1 | 110.6 | 110.6 | 4.1 | 3.2 |
| Sales (\$000s) ADOR | | | | | | | |
| Aggregate Retail Sales | 4,813,432 | 3,730,809 | 3,873,612 | 4,486,082 | ... | 12.0 | 9.9 |
| Retail | 3,529,332 | 2,473,882 | 2,564,622 | 3,055,311 | ... | 11.7 | 9.2 |
| Food, EBR | 515,343 | 537,173 | 542,270 | 545,906 | ... | 12.9 | 9.3 |
| Restaurants & Bars | 501,753 | 475,801 | 516,102 | 524,756 | ... | 4.0 | 9.3 |
| Gasoline, EBR | 267,003 | 243,953 | 250,618 | 360,109 | ... | 27.2 | 18.7 |
| Contracting | 1,086,602 | 816,186 | 888,434 | 1,090,141 | ... | 30.8 | 22.4 |
| Hotel/Motel | 91,273 | 129,578 | 160,359 | 217,012 | ... | 31.3 | 9.5 |
| New Housing Units Authorized, Census C-40 | | | | | | | |
| Total Units | 5,284 | 4,313 | 4,366 | 5,017 | 6,078 | -6.2 | 9.2 |
| Single Family Units | 3,958 | 3,726 | 3,960 | 4,474 | 4,644 | -4.3 | 13.5 |
| 2-4 Unit Structures | 110 | 82 | 48 | 158 | 44 | -82.7 | -5.5 |
| 5-plus Unit Structures | 1,216 | 505 | 358 | 385 | 1,390 | 1.3 | -16.9 |
| Housing Sales and Prices, ARMLS | | | | | | | |
| Total Sales (\$000s) | 1,808,665 | 1,633,450 | 1,871,129 | 2,611,405 | 2,592,396 | 44.6 | 40.3 |
| Total Units | 7,554 | 6,301 | 7,424 | 9,508 | 9,123 | 7.9 | 23.5 |
| Average Price (\$) | 239,431 | 259,237 | 252,038 | 274,653 | 284,160 | 34.0 | 13.3 |
| Phoenix Skyharbor International Airport, PSIA | | | | | | | |
| Total Passengers | 3,347,436 | 3,154,466 | 3,038,182 | 3,799,760 | ... | 6.2 | 5.6 |
| Total Aircraft Movements | 47,110 | 46,062 | 42,702 | 48,686 | ... | 5.3 | 1.2 |

SOURCES AND ABBREVIATIONS:

ADES: Arizona Department of Economic Security

ADHS: Arizona Department of Health Services

ADOR: Arizona Department of Revenue

ADOT: Arizona Department of Transportation

ARMLS: Arizona Regional Multiple Listing Service

ASPB: Arizona State Parks Board

BEA: Bureau of Economic Analysis, U.S. Department of Commerce

BLS: Bureau of Labor Statistics,

U.S. Department of Labor

Census C-40: Bureau of the Census, U.S. Department

of Commerce

EBR: Economic & Business Research Program,

The University of Arizona

NPS: National Park Service, U.S. Department of the Interior

PSIA: Phoenix Skyharbor International Airport

SAAR: Seasonally adjusted at annual rates

TAA: Tucson Airport Authority

TAR: Tucson Association of Realtors

U.S. Bankruptcy Court: District of Arizona

USBCBP: U.S. Bureau of Customs and Border

Protection, U.S. Department of Homeland Security

| | I 2004 | II 2004 | III 2004 | IV 2004 | I 2005 | % change versus year ago for most recent: quarter 4-quarters | |
|--|-----------|------------|-------------|------------|-----------|---|------|
| PHOENIX-MESA METROPOLITAN REGION (MARICOPA AND PINAL COUNTY) - QUARTERLY DATA | | | | | | | |
| Demographics & Vital Statistics (000s, seas adj) ADHS & EBR | | | | | | | |
| Population | 3,686.8 | 3,724.6 | 3,762.8 | 3,801.0 | 3,839.4 | 4.1 | 4.0 |
| Natural Increase | 9.2 | 9.2 | 9.2 | 9.3 | 9.3 | 1.1 | 1.7 |
| Births | 15.5 | 15.5 | 15.6 | 15.7 | 15.8 | 2.4 | 2.3 |
| Deaths | 6.2 | 6.3 | 6.4 | 6.5 | 6.5 | 4.3 | 3.3 |
| Net Migration | 26.9 | 28.5 | 29.0 | 28.9 | 29.1 | 8.4 | 17.4 |
| Personal Income by Source (\$mil, SAAR) EBR | | | | | | | |
| Total Personal Income | 109,775 | 112,119 | 114,709 | 117,562 | 120,364 | 9.6 | 7.8 |
| Earnings by Place of Work | 87,716 | 89,654 | 91,852 | 94,355 | 96,826 | 10.4 | 8.2 |
| Less: Contributions for Social Insurance | 9,673 | 9,917 | 10,177 | 10,451 | 10,720 | 10.8 | 9.2 |
| Plus: Adjustment for Residence | -47 | -46 | -45 | -44 | -44 | 5.2 | 0.1 |
| Plus: Dividends, Interest & Rents | 17,572 | 17,920 | 18,264 | 18,576 | 18,867 | 7.4 | 5.9 |
| Plus: Transfer Payments | 14,207 | 14,508 | 14,815 | 15,126 | 15,435 | 8.6 | 8.3 |
| Per Capita Personal Income (\$, SAAR) EBR | 29,775 | 30,103 | 30,485 | 30,929 | 31,349 | 5.3 | 3.6 |

ARIZONA - QUARTERLY DATA

Demographics & Vital Statistics (000s, seas adj) ADHS & EBR

| | | | | | | | |
|------------------|---------|---------|---------|---------|---------|------|------|
| Population | 5,756.3 | 5,806.9 | 5,857.5 | 5,908.6 | 5,959.7 | 3.5 | 3.5 |
| Natural Increase | 12.6 | 12.3 | 12.5 | 13.8 | 12.8 | 1.6 | 6.4 |
| Births | 23.2 | 22.9 | 23.3 | 23.6 | 23.3 | 0.5 | 1.6 |
| Deaths | 10.6 | 10.6 | 10.7 | 9.8 | 10.5 | -0.8 | -3.9 |
| Net Migration | 38.0 | 38.2 | 38.1 | 37.8 | 37.7 | -0.7 | 6.5 |

Personal Income Derivation (\$mil, SAAR) BEA & EBR

| | | | | | | | |
|--|---------|---------|---------|---------|---------|------|-----|
| Total Personal Income | 156,124 | 159,072 | 162,227 | 167,882 | 170,384 | 9.1 | 8.0 |
| Earnings by Place of Work | 119,962 | 122,377 | 125,332 | 128,461 | 132,041 | 10.1 | 8.7 |
| Less: Contributions for Social Insurance | 13,383 | 13,636 | 13,955 | 14,295 | 14,859 | 11.0 | 9.7 |
| Plus: Adjustment for Residence | 588 | 600 | 616 | 632 | 651 | 10.7 | 8.8 |
| Plus: Dividends, Interest & Rents | 24,690 | 24,945 | 25,041 | 27,502 | 26,226 | 6.2 | 5.8 |
| Plus: Transfer Payments | 24,268 | 24,788 | 25,197 | 25,583 | 26,327 | 8.5 | 7.8 |

Components of Earnings (\$mil, SAAR) BEA & EBR

| | | | | | | | |
|------------------------|--------|--------|--------|--------|--------|-------|------|
| Wages and Salaries | 87,154 | 88,715 | 91,060 | 93,050 | 95,435 | 9.5 | 8.2 |
| Other Labor Income EBR | 18,944 | 19,319 | 19,783 | 20,313 | 20,970 | 10.7 | 9.9 |
| Proprietor's Income | 13,764 | 14,361 | 14,641 | ... | ... | 8.8 | 10.7 |
| Farm | 400 | 415 | 438 | ... | ... | -15.9 | 27.4 |
| Nonfarm | 13,364 | 13,946 | 14,203 | ... | ... | 9.8 | 10.2 |

Per Capita Personal Income (\$, SAAR) EBR

| | | | | | | | |
|---|--------|--------|--------|--------|--------|-----|-----|
| Per Capita Personal Income (\$, SAAR) EBR | 27,122 | 27,394 | 27,696 | 28,413 | 28,590 | 5.4 | 4.3 |
|---|--------|--------|--------|--------|--------|-----|-----|

Average Wage Per Employee, Annual Rate (\$) EBR

| | | | | | | | |
|---|--------|--------|--------|-----|-----|-----|-----|
| Average Wage Per Employee, Annual Rate (\$) EBR | 36,590 | 37,051 | 37,230 | ... | ... | 3.6 | 3.9 |
|---|--------|--------|--------|-----|-----|-----|-----|

TRAVEL AND TOURISM - MONTHLY DATA

| | DEC 2004 | JAN 2005 | FEB 2005 | MAR 2005 | APR 2005 | % change versus year ago for most recent: month 12-months | |
|---|-------------|-------------|-------------|-------------|-------------|--|------|
| Visits to Parks & Other Recreational Areas, NPS & ASPB | | | | | | | |
| Northern Arizona | 805,259 | 761,303 | 868,546 | 1,390,477 | 1,557,381 | -8.6 | -2.8 |
| Historical | 60,415 | 56,147 | 70,245 | 143,595 | 149,206 | -8.6 | -4.5 |
| Scenic | 254,324 | 173,514 | 234,089 | 517,851 | 552,562 | -0.2 | 1.5 |
| Water Based Recreation | 490,520 | 531,642 | 564,212 | 729,031 | 855,613 | -13.3 | -4.9 |
| Southern Arizona | 186,656 | 243,150 | 299,213 | 489,771 | 347,987 | 44.0 | 5.2 |
| Historical | 36,285 | 47,110 | 58,027 | 75,090 | 64,318 | 78.1 | 6.5 |
| Scenic | 140,861 | 176,376 | 218,397 | 366,497 | 247,811 | 45.7 | 5.5 |
| Water Based Recreation | 9,510 | 19,664 | 22,789 | 48,184 | 35,858 | 0.8 | 2.0 |
| International Border Crossings, USBCBP | | | | | | | |
| U.S. Citizens | 701,001 | 641,084 | na | na | ... | -8.4 | -4.1 |
| Aliens | 1,945,437 | 1,760,805 | na | na | ... | -11.8 | -1.3 |
| Vehicles | 909,527 | 903,760 | 868,398 | 922,793 | ... | 1.4 | 1.4 |

MEASURES OF INFLATION AND PRICES - MONTHLY DATA

Consumer Price Index (1982-1984=100) BLS

| | | | | | | | |
|---------------------|-------|-------|-------|-------|-------|-----|-----|
| U.S. - All Urban | 190.3 | 190.7 | 191.8 | 193.3 | 194.6 | 3.5 | 3.1 |
| U.S. - Wage Earners | 186.0 | 186.3 | 187.3 | 188.6 | 190.2 | 3.7 | 3.1 |

See sources and abbreviations at the bottom of page 16. • For additional detail and history, subscribe to *Arizona Economic Indicators Data Book*.

ARIZONA ECONOMIC INDICATORS

| | DEC 2004 | JAN 2005 | FEB 2005 | MAR 2005 | APR 2005 | % change versus year ago for most recent: month 12-months | |
|--|-------------|-------------|-------------|-------------|-------------|---|-------|
| ARIZONA MONTHLY DATA | | | | | | | |
| Civilian Labor Force (000s) ADES | | | | | | | |
| Employment | 2,797.4 | 2,793.7 | 2,794.5 | 2,801.2 | 2,825.0 | 2.4 | 2.3 |
| Unemployment | 2,681.9 | 2,671.9 | 2,672.2 | 2,673.0 | 2,692.4 | 2.7 | 3.1 |
| Unemployment Rate, Seas. Adj. (%) | 115.5 | 121.8 | 122.3 | 128.2 | 132.6 | -3.4 | -12.4 |
| | 4.5 | 4.2 | 4.4 | 4.7 | 5.0 | -3.8 | -13.5 |
| Employees on Nonagricultural Payrolls (000s) ADES | | | | | | | |
| Total | 2,451.0 | 2,407.3 | 2,437.0 | 2,451.5 | 2,463.0 | 3.8 | 3.8 |
| Natural Resources and Mining | 8.8 | 8.8 | 8.9 | 9.0 | 9.1 | 11.0 | 8.6 |
| Construction | 198.7 | 196.1 | 198.3 | 202.9 | 206.4 | 11.1 | 9.1 |
| Durable Goods Manufacturing | 141.5 | 141.4 | 141.7 | 141.8 | 142.0 | 1.0 | 1.2 |
| Fabricated Metal Products | 17.6 | 17.4 | 17.5 | 17.6 | 17.6 | 3.5 | 4.2 |
| Computer and Electronic Prod. | 43.4 | 43.4 | 43.3 | 43.3 | 43.4 | -1.8 | -1.7 |
| Aerospace Products and Parts | 26.4 | 26.4 | 26.7 | 26.7 | 26.7 | 1.9 | 0.3 |
| Non-Durable Goods Manufacturing | 34.9 | 34.6 | 34.7 | 34.8 | 34.0 | -0.6 | -1.0 |
| Wholesale Trade | 97.1 | 96.6 | 96.9 | 96.9 | 95.7 | 1.3 | 2.7 |
| Retail Trade | 313.6 | 302.9 | 299.6 | 300.3 | 300.9 | 5.9 | 5.3 |
| Utilities | 11.3 | 11.4 | 11.4 | 11.4 | 11.5 | 0.0 | 0.4 |
| Transportation and Warehousing | 66.8 | 66.1 | 66.2 | 66.3 | 66.4 | 0.3 | 1.6 |
| Information | 46.4 | 46.1 | 45.7 | 46.0 | 45.7 | -6.7 | -4.5 |
| Finance and Insurance | 120.2 | 118.8 | 120.3 | 120.9 | 121.9 | 2.4 | 2.0 |
| Real Estate, Rental, and Leasing | 46.3 | 45.3 | 45.4 | 45.7 | 45.9 | 1.5 | 3.3 |
| Professional and Business Services | 343.8 | 336.3 | 341.4 | 344.5 | 347.7 | 4.3 | 4.9 |
| Educational Services | 40.4 | 40.2 | 41.2 | 41.3 | 42.1 | 10.8 | 11.0 |
| Health Care and Social Assistance | 226.8 | 227.8 | 228.5 | 229.5 | 230.4 | 4.6 | 4.4 |
| Arts, Entertainment, and Recreation | 31.2 | 31.4 | 32.6 | 33.4 | 33.8 | 8.0 | 4.9 |
| Accommodation | 45.0 | 45.2 | 45.6 | 46.0 | 46.9 | 4.7 | 3.6 |
| Food Svcs and Drinking Places | 170.3 | 168.0 | 170.7 | 173.8 | 174.3 | 3.4 | 3.7 |
| Other Services | 90.1 | 88.6 | 88.9 | 89.8 | 89.2 | 0.6 | 1.3 |
| Federal Government | 51.7 | 50.6 | 50.7 | 51.0 | 51.2 | 0.8 | 1.0 |
| State and Local Government | 366.1 | 351.1 | 368.3 | 366.2 | 367.9 | 2.9 | 2.8 |
| State and Local Government Education | 201.7 | 186.7 | 203.1 | 201.1 | 200.9 | 4.0 | 3.4 |
| Hours Worked Per Week, Manufacturing, ADES | 42.0 | 41.3 | 41.3 | 41.5 | 40.9 | 2.8 | 0.9 |
| Average Hourly Earnings (\$) ADES | | | | | | | |
| Construction | 15.59 | 15.35 | 15.55 | 15.58 | 15.57 | 2.2 | 0.8 |
| Manufacturing | 14.22 | 14.41 | 14.54 | 14.43 | 14.80 | 3.6 | -0.4 |
| Trade, Transportation, Utilities | 14.32 | 14.72 | 14.83 | 14.70 | 14.73 | 5.7 | 6.0 |
| Retail Trade | 11.68 | 11.94 | 12.08 | 12.05 | 12.12 | 4.8 | 2.3 |
| Wholesale Trade | 17.98 | 18.42 | 18.67 | 18.59 | 18.82 | 3.2 | 5.3 |
| Sales (\$000s) ADOR | | | | | | | |
| Aggregate Retail Sales | 6,989,260 | 5,400,114 | 5,646,479 | 6,489,854 | ... | 11.3 | 9.5 |
| Retail | 5,050,779 | 3,538,852 | 3,702,339 | 4,331,646 | ... | 10.5 | 8.6 |
| Food, EBR | 781,850 | 795,830 | 803,382 | 808,769 | ... | 10.2 | 8.7 |
| Restaurants & Bars | 712,790 | 663,748 | 725,864 | 753,137 | ... | 6.2 | 9.3 |
| Gasoline, EBR | 443,841 | 401,685 | 414,895 | 596,303 | ... | 27.8 | 19.4 |
| Gallons (000s) ADOT | 234,328 | 222,762 | 211,681 | 249,603 | ... | 4.4 | 3.2 |
| Utilities | 526,748 | 542,399 | 486,130 | 468,466 | ... | 4.8 | 6.8 |
| Communications | 238,267 | 243,321 | 216,407 | 253,662 | ... | 4.8 | -0.2 |
| Amusements | 74,341 | 73,045 | 84,286 | 96,616 | ... | -8.8 | 2.6 |
| Rentals - Personal Property | 289,549 | 251,268 | 273,608 | 299,845 | ... | -0.4 | 1.8 |
| Contracting | 1,488,096 | 1,132,232 | 1,236,786 | 1,494,326 | ... | 27.0 | 19.6 |
| Mining - Metal, Oil & Gas | 98,898 | 79,547 | 94,455 | 91,320 | ... | 22.0 | 88.4 |
| Hotel/Motel | 141,396 | 185,880 | 234,663 | 305,076 | ... | 27.4 | 9.0 |
| New Housing Units Authorized, Census C-40 | | | | | | | |
| Total Units | 6,986 | 5,915 | 6,152 | 7,445 | 8,361 | 0.9 | 13.5 |
| Single Family Units | 5,643 | 5,286 | 5,626 | 6,733 | 6,821 | 3.7 | 16.3 |
| 2-4 Unit Structures | 121 | 115 | 79 | 200 | 82 | -75.2 | -12.4 |
| 5-plus Unit Structures | 1,222 | 514 | 447 | 512 | 1,458 | 5.3 | -10.4 |
| Bankruptcy Filings, U.S. Bankruptcy Court | | | | | | | |
| Total | 2,175 | 1,977 | 2,016 | 3,191 | 3,408 | 18.6 | -2.2 |
| Chapter 7 | 1,714 | 1,503 | 1,645 | 2,770 | 2,982 | 24.9 | 0.2 |
| Chapter 11 | 9 | 19 | 6 | 11 | 14 | 0.0 | -33.6 |
| Chapter 13 | 452 | 455 | 365 | 410 | 412 | -12.9 | -11.5 |

See sources and abbreviations at the bottom of page 16. • For additional detail and history, subscribe to *Arizona Economic Indicators Data Book*.

| | I 2004 | II 2004 | III 2004 | IV 2004 | I 2005 | % change versus year ago for most recent: quarter 4-quarters | |
|---|-----------|------------|-------------|------------|-----------|---|-----|
| MEASURES OF INFLATION AND PRICES -QUARTERLY DATA | | | | | | | |
| Consumer Price index (1982-84=100) BLS | | | | | | | |
| Western Region (U.S.) | 190.8 | 193.0 | 193.2 | 194.8 | 195.8 | 2.6 | 2.6 |
| U.S. - All Urban Consumers | 186.3 | 188.9 | 189.6 | 190.7 | 191.9 | 3.0 | 3.0 |
| U.S. - Urban Wage Earners | 181.9 | 184.5 | 185.1 | 186.4 | 187.4 | 3.0 | 3.0 |
| Price Indexes (1996=100) BEA | | | | | | | |
| Gross Domestic Product | 107.3 | 108.2 | 108.6 | 109.2 | 109.9 | 2.4 | 2.3 |
| Personal Consumption Expenditures | 106.9 | 107.7 | 108.0 | 108.7 | 109.3 | 2.3 | 2.3 |

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