COUNTIES GEOANALYSIS · UNITED STATES

Greater Phoenix Region

Phoenix, AZ

Report generated on August 26, 2026

GEOGRAPHIC INTELLIGENCE FOR REGIONAL INVESTMENT DECISIONS

Understand the region. Measure the coverage. Find the white space.

100-MILE RADIUS COVERING 5 COUNTIES

POPULATION	HOUSEHOLDS	INCOME	BUSINESSES	COUNTIES
6,388,519 RESIDENTS	**2,465,242** HOUSEHOLDS	**$74,296** MEDIAN HH INCOME	**3,106** LOCATIONS (POIS)	**5** COUNTIES ANALYZED
2.6x residents per household	**91.0%** housing occupancy	**12.5%** households $200K+	**0.5** POIs per 1,000 residents	**1,277,704** avg residents per county

KEY FINDINGS

The hard numbers first: even in a compact five-county radius, most retail categories — from fitness to accessible health clinics to home furnishings — have their leading brand confined to just one or two of the five counties, and the $74,296 regional median income blends a booming Maricopa metro core with more modest outlying counties. What remains is the larger story: a 6.39 million-resident region that is young, highly educated, and majority formed by newcomers from other states, with a coverage map where fitness centers and accessible health clinics barely exist outside a single county.

The opportunity is not to be one more — it is to cover what no one covers.

TECHNICAL SHEET

Analyzed region	100-mile radius
Counties covered	5
Points of interest	3,106
Housing units	2,707,761 total · 2,465,242 occupied (91.0%)
Coordinates	33.4429, -111.9786
Sources	ACS 2024 + NOAA 2025 + MktCompass
Report date	August 26, 2026

01 · INTRODUCTION

Why does a regional analysis reduce the risk of your investment?

This report presents a geostatistical analysis of the Greater Phoenix region, delimited by a 100-mile radius centered near Tempe, in Maricopa County, and extending into the neighboring counties of Pinal, Pima, Yavapai and Gila, covering a total of 5 counties in Arizona. At this scale, the report describes a regional market — the pool of residents, brands and climate conditions an investor faces when planning coverage, expansion or a flagship location — rather than the foot traffic of a single site.

The data come from the American Community Survey (ACS) 2024 of the U.S. Census Bureau aggregated at county level, the National Oceanic and Atmospheric Administration (NOAA) 2025 climate statistics for the region, and the MktCompass directory of commercial and institutional locations with their county-by-county coverage.

Regional geomarketing answers three fundamental questions:

- Who lives across the region, how much spending capacity do they have, and how is the community composed?
- Which brands and categories already cover the region — and in how many of its counties are they actually present?
- Which categories show regional white space: thin penetration for the population size, or coverage concentrated in a few counties?

	Why it matters
HARD DATA	Official U.S. Census Bureau and NOAA statistics with nationwide coverage and rigorous methodology.
SCALE	County-level aggregation describes the real regional market an expansion or coverage strategy must serve.
INSIGHTS	Actionable findings on penetration and coverage that reduce investment risk at regional scale.
ACTION	Identification of coverage white space to pursue and of regionally saturated categories to avoid.

> *With the method clear, we move on to who lives across this region — because the first step to spotting an opportunity is understanding the market's size and spending capacity.*

02 · POPULATION PROFILE & SPENDING CAPACITY

Who lives here, how many are they, and how much spending capacity do they have?

Household income distribution

Annual household income	Households	% of total	Analysis
Less than $10,000	113,470	4.6%	Regular
$10,000 to $19,999	121,776	4.9%	Very low
$20,000 to $34,999	221,966	9.0%	Low
$35,000 to $59,999	416,564	16.9%	Low
$60,000 to $99,999	569,137	23.1%	Regular
$100,000 to $149,999	468,203	19.0%	High
$150,000 to $199,999	245,194	9.9%	Very high
$200,000 or more	308,932	12.5%	Very high
Total households	**2,465,242**	**100%**	—

Median household income: $74,296 — Analysis vs. national average: High.

The regional median of $74,296 rates High, with a notable high tail: 41.4% of the region's 2.46 million households earn $100,000 or more, and the $200,000+ bracket hits a Very high 12.5% (308,932 households). The dominant bracket is more modest ($60,000–$99,999, 23.1%, Regular). This blend is regional: it averages the Maricopa metro core with more rural outlying counties, so value formats travel well across the region while premium concepts should concentrate where the high tail is densest.

Population by age and gender

Age group	Male	Female	Total	%	Analysis
Under 5 years	175,919	168,666	344,585	5.4%	Regular
5 to 9 years	193,322	184,044	377,366	5.9%	Regular
10 to 14 years	206,663	198,750	405,413	6.3%	Regular
15 to 19 years	216,730	203,655	420,385	6.6%	Regular
20 to 29 years	453,189	427,441	880,630	13.8%	Very high
30 to 39 years	446,470	421,725	868,195	13.6%	Very high
40 to 49 years	392,221	385,141	777,362	12.2%	High
50 to 59 years	372,592	379,723	752,315	11.8%	Low
60 to 69 years	352,783	390,923	743,706	11.6%	Low
70 to 79 years	258,614	293,793	552,407	8.6%	Regular
80 years and over	114,284	151,871	266,155	4.2%	Low
Total population 2024	**3,182,787**	**3,205,732**	**6,388,519**	**100%**	—

2019 population is not available in this file; the report does not estimate population change.

The region skews young-productive: the 20-29 (13.8%, Very high), 30-39 (13.6%, Very high) and 40-49 (12.2%, High) bands together hold 2,526,187 people — 39.6% of the total — while every band 50 and older rates Low. This is a household-formation, career-stage market, not a retirement market.

Race and ethnicity

Category	Population	% of total	Analysis
White population	3,409,179	53.4%	Low
Black or African American population	308,367	4.8%	High
American Indian and Alaska Native population	100,983	1.6%	Very high
Asian population	245,051	3.8%	Very high
Native Hawaiian and Other Pacific Islander population	11,215	0.2%	Very high
Some other race population	30,581	0.5%	High
Two or more races population	287,396	4.5%	High
Hispanic or Latino population	1,995,747	31.2%	Very high
Total population	**6,388,519**	**100%**	—

The Hispanic or Latino community rates Very high (31.2%, 1,995,747 people), and the White population, though the absolute majority (53.4%), rates Low against the reference pattern. The American Indian and Alaska Native community also rates Very high (1.6%, 100,983 people) — a signal consistent with the tribal communities of central Arizona — alongside a Very high Asian community (3.8%, 245,051 people).

Health insurance coverage

Category	Population	% of total	Analysis
Private health insurance Employer-based only	2,837,236	45.0%	High
Private health insurance only	3,313,398	52.5%	High
Private health insurance Direct-purchase only	359,853	5.7%	Regular
Public coverage Medicare coverage only	481,238	7.6%	Regular
Public coverage only	1,581,420	25.1%	Low
Public coverage Medicaid/means-tested only	875,662	13.9%	Regular
Public coverage TRICARE/military health coverage only	53,845	0.9%	High
Public coverage Veterans Affairs health care only	18,899	0.3%	Regular
Two or more types of health insurance coverage	1,031,367	16.4%	Low
Private and public health insurance coverage	763,282	12.1%	Low
Population with no insurance	647,317	10.3%	High

Private coverage dominates (52.5%, High), with 45.0% exclusively employer-based — a reflection of the professional labor profile detailed later in this report. The uninsured population rates High (10.3%, 647,317 people): a substantial market for accessible health services. TRICARE/military coverage also rates High (0.9%, 53,845 people), signaling military installations in the region.

Digital access at home (computers & internet)

Device / access	Households	% penetration	Analysis
Has computing device	2,390,180	97.0%	Very high

Device / access	Households	% penetration	Analysis
Desktop or laptop	2,092,153	84.9%	Very high
Desktop/laptop only	58,847	2.4%	Low
Smartphone	2,291,202	92.9%	Very high
Smartphone only	185,915	7.5%	Very low
Tablet/portable	1,648,389	66.9%	Very high
Tablet only	12,977	0.5%	Low
Other computer	76,767	3.1%	Very high
Other computer only	871	0.0%	Very high
No computer	75,062	3.0%	Very low
With Internet subscription	2,287,650	92.8%	Very high
Dial-up only	3,216	0.1%	Regular
Broadband any type	2,284,434	92.7%	Very high
Cellular data plan	2,132,792	86.5%	Very high
Cellular only	263,091	10.7%	Low
Cable/Fiber/DSL	1,922,521	78.0%	Very high
Cable/Fiber/DSL only	129,788	5.3%	Regular
Satellite service	186,459	7.6%	Low
Satellite only	11,096	0.5%	Low
Other service only	1,384	0.1%	Very low
Internet no subscription	53,399	2.2%	Regular
No Internet access	124,193	5.0%	Very low

Digital reach is excellent: 97.0% of households have a computing device and 92.8% carry an internet subscription, both Very high. Satellite service, a minority at 7.6% (Low), is the tell for the more rural outlying counties: digital delivery, online ordering and marketing channels have real reach across the region, with that rural caveat.

Key socioeconomic insights

01

A $74,296 MARKET WITH A HIGH TAIL

Median income of $74,296 (High) with 41.4% of households above $100,000. The region supports value formats broadly and premium propositions where the high tail concentrates.

02

A YOUNG, PRODUCTIVE AGE STRUCTURE

39.6% of residents are 20-49 years old (2,526,187 people), while every 50+ band rates Low. Household-formation and career-stage demand dominates over retirement demand.

03

A REGION OF DISTINCTIVE DIVERSITY

The Hispanic or Latino population rates Very high (31.2%, 1,995,747 people) and the American Indian community also rates Very high (1.6%, 100,983 people) — a composition that makes cultural relevance a core strategy, not a niche.

04

REGION-WIDE DIGITAL REACH

97.0% device penetration and 92.8% internet subscription mean delivery, online ordering and digital marketing work across the region, not just in the metro core.

05

647,317 UNINSURED RESIDENTS

A High 10.3% uninsured share sizes a real market for accessible health services, while High TRICARE coverage (53,845 people) confirms military installations in the region.

> *The market's size and spending power are clear. Now let's look at where this community comes from and what languages it speaks at home — because at regional scale, cultural composition defines entire market segments.*

03 · COMMUNITY COMPOSITION & CULTURAL MARKETS

Where does this community come from, what languages does it speak, and what markets does that open?

Nativity and citizenship

Indicator	Population	% of total	Analysis
U.S. citizen, born in the United States	5,445,782	85.2%	Very low
U.S. citizen, born in Puerto Rico or U.S. Island Areas	13,606	0.2%	High
U.S. citizen, born abroad of American parent(s)	83,182	1.3%	Very high
U.S. citizen by naturalization	406,056	6.4%	Very high
Not a U.S. citizen	439,893	6.9%	Very high
Born in state of residence	2,483,056	38.9%	Very low
Born in other state in the United States	2,962,726	46.4%	Very high
Northeast	430,030	6.7%	Very high
Midwest	1,004,217	15.7%	Very high
South	442,392	6.9%	Regular
West	1,086,087	17.0%	Very high
Born outside the United States	96,788	1.5%	Very high
Puerto Rico	9,603	0.2%	High
U.S. Island Areas	4,003	0.1%	Very high
Born abroad of American parent(s)	83,182	1.3%	Very high
Foreign-born	845,949	13.2%	Very high
Naturalized U.S. citizen	406,056	6.4%	Very high
Not a U.S. citizen (Foreign-born)	439,893	N/D	—

This is a region that is arriving, not staying put: only 38.9% of residents were born in Arizona (Very low, 2,483,056 people), against 46.4% born in another U.S. state (Very high, 2,962,726 people) — led by the West (17.0%, 1,086,087) and the Midwest (15.7%, 1,004,217). On top of that, a Very high 13.2% (845,949 people) were born outside the U.S., of whom 406,056 have already naturalized. For any brand, this means a region where consumption habits are still actively forming, not a region of already-closed loyalties.

Language spoken at home (households)

Methodological note: The language table counts households, not people; its total equals the region's total households. Spanish sub-rows (with / without limited English) are part of the Spanish total.

Language at home	Households	% of households	Analysis
English only	1,805,332	73.2%	Very low
Spanish	473,658	19.2%	Very high
Spanish and Limited English	55,208	2.2%	Very high
Spanish and Not a limited English	418,450	17.0%	Very high
French, Haitian, or Cajun	11,272	0.5%	High
German or other West Germanic languages	13,216	0.5%	High
Russian, Polish, or other Slavic languages	13,933	0.6%	Very high

Other Indo-European languages	37,028	1.5%	Very high
Korean	6,559	0.3%	Very high
Chinese (incl. Mandarin, Cantonese)	17,870	0.7%	Very high
Vietnamese	10,681	0.4%	Very high
Tagalog (incl. Filipino)	14,057	0.6%	Very high
Other Asian and Pacific Island languages	23,402	0.9%	Very high
Arabic	10,512	0.4%	Very high
Other and unspecified languages	27,722	1.1%	Very high
Total	**2,465,242**	**100%**	—

The bilingual market is structural: 19.2% of the region's 2.46 million households speak Spanish at home (Very high, 473,658 households), of which 418,450 do so with not-limited English and 55,208 with limited English (both Very high) — a segment that rewards Spanish-language service end to end. Smaller-share language communities still stand out: Russian/Polish/Slavic, Korean, Chinese, Vietnamese, Tagalog and Arabic all rate Very high.

Key community insights

01

AN ARRIVING REGION, NOT A ROOTED ONE

46.4% of residents were born in another U.S. state (2,962,726 people) versus only 38.9% born in Arizona. Consumption habits here are still forming, not defending — a window for a new brand to become the default choice.

02

A 473,658-HOUSEHOLD SPANISH-SPEAKING MARKET

19.2% of households speak Spanish at home. Bilingual signage, staffing and media are not a courtesy — they are a revenue strategy, especially for the 55,208 limited-English households.

03

THE INTERNATIONAL COMMUNITY AS MARKET AND WORKFORCE

845,949 foreign-born residents (Very high) sustain categories like international groceries, remittances and immigration services — and are a proven entrepreneurial base for franchise recruitment.

> *We know who the region's residents are and how they communicate. Now let's see how they work and move — because labor structure and commuting define the region's economic rhythm.*

04 · RESIDENT WORK & MOBILITY PROFILE

What do residents do for work, how do they move, and what does that imply for the region's economy?

Methodological note: The following tables describe employed residents of this region, wherever they work — not people who work inside it (ACS does not measure on-site employment). Read them as the labor and mobility profile of the population, not as daytime foot traffic.

Employment status (population 16+)

Status	Residents	% of 16+	Analysis
In Labor Force	3,218,426	62.2%	High
Civilian labor force	3,202,103	61.9%	High
Employed	3,048,696	58.9%	High
Unemployed	153,407	3.0%	High
Armed Forces	16,323	0.3%	Very high
Not in Labor Force	1,955,153	37.8%	Low
Total Population 16 years and over	**5,173,579**	**100%**	—

Labor-force participation rates High (62.2%, 3,218,426 residents 16+), with unemployment also rating High (3.0%, 153,407 people) — a figure worth monitoring against the region's otherwise strong indicators. The Armed Forces share is Very high (0.3%, 16,323 people), signaling military installations with a stable federal payroll and a rotating population, consistent with the elevated TRICARE coverage.

Occupations of the employed population

Occupation group	Residents	% of employed	Analysis
Professional and management occupations	1,289,512	42.3%	Very high
Technology and data occupations	119,583	3.9%	Very high
Education occupations	166,211	5.5%	Low
Healthcare practitioners and technical occupations	190,474	6.2%	Regular
Total healthcare occupations	281,009	9.2%	Regular
Service occupations	498,351	16.3%	Regular
Healthcare support occupations	90,535	3.0%	Low
Public safety and protection occupations	69,103	2.3%	Regular
Firefighting and non-police protection	41,207	1.4%	High
Law enforcement occupations	27,896	0.9%	Regular
Sales and office occupations	672,095	22.0%	Very high
Construction and skilled trades	257,727	8.5%	Low
Production and transportation	331,011	10.9%	Low
Total employed population	**3,048,696**	**100%**	—

Professional and management occupations lead with a Very high 42.3% (1,289,512 employed residents), joined by sales and office also Very high (22.0%, 672,095) and technology and data Very high (3.9%, 119,583). The implied income is solid white-collar, consistent with the $74,296 median.

Means of transport to work

Means of transport	Residents	% of total	Analysis
Car, truck, or van	2,277,864	75.6%	Very low
Public transportation	33,372	1.1%	Very high
Bus	29,273	1.0%	Very high
Subway or elevated rail	582	0.0%	Very high
Taxi or ride-hailing services	6,817	0.2%	Very high
Motorcycle	7,785	0.3%	Very high
Bicycle	14,789	0.5%	Very high
Walked	44,824	1.5%	Low
Other means	41,607	1.4%	High
Worked from home	585,199	19.4%	Very high

This is a car-dependent region for the daily commute, but the decisive figure is elsewhere: 19.4% of employed residents work from home (Very high, 585,199 people) — over half a million people generating daytime demand in their home counties every weekday. Of those who do commute, 37.8% travel 30 minutes or more (917,219 people), which at regional scale reads as commuter corridors crossing county lines daily.

Departure time to work (consumption windows)

Departure window	Residents	% of total	Analysis
1200 a.m. to 459 a.m.	206,732	8.5%	Very high
500 a.m. to 559 a.m.	279,359	11.5%	High
600 a.m. to 659 a.m.	454,508	18.7%	Low
700 a.m. to 759 a.m.	550,414	22.7%	Very low
800 a.m. to 859 a.m.	353,099	14.5%	High
900 a.m. to 959 a.m.	144,944	6.0%	High
1000 a.m. to 1059 a.m.	71,815	3.0%	High
1100 a.m. to 1159 a.m.	37,635	1.6%	High
1200 p.m. to 359 p.m.	169,910	7.0%	High
400 p.m. to 1159 p.m.	158,642	6.5%	High

Departure is early and dispersed: 38.7% of employed residents leave before 7:00 a.m. (roughly 940,600 people across the three early bands), with the 6:00–8:59 a.m. windows carrying the bulk of the rest. The morning window dominates pre-work consumption, while the half-million-strong work-from-home base sustains an additional mid-morning and midday window in residential counties.

Key work & mobility insights

01

A HEALTHY LABOR ECONOMY WITH A MILITARY SIGNAL

62.2% labor-force participation (High) and a Very high Armed Forces share (16,323 people) confirm stable federal payroll and constant demand renewal around the military installations.

02

A WHITE-COLLAR OCCUPATIONAL PROFILE

42.3% in professional and management occupations (Very high) and 22.0% in sales and office (Very high) imply solid income, consistent with the regional median.

03 **COMMUTER CORRIDORS BETWEEN COUNTIES**

37.8% of employed residents commute 30 minutes or more (917,219 people), crossing county lines daily — a structural advantage for highway-access and drive-thru formats.

04 **585,199 REMOTE WORKERS SUSTAIN DAYTIME DEMAND**

A Very high 19.4% work-from-home share generates demand for coffee, lunch, fitness and services outside traditional office hours, in the counties where these residents live.

> *Residents and their routines are clear. Before mapping the commercial landscape, one more regional factor the urban report never sees: the climate this market lives in all year.*

05 · CLIMATE & SEASONALITY (NOAA 2025)

What climate does this region live in, and how does it shape demand across the year?

Climate indicator	Regional value	Analysis vs. national avg.
Medium average temperature (°F)	67.6	Very high
Medium minimum temperature (°F)	53.2	Very high
Minimum temperature in the year (°F)	31.4	Very high
Number of cold months (Less 50 °F)	5.4	Low
Number of extreme cold months (Less 32 °F)	1	Very low
Medium max temperature (°F)	82.4	Very high
Max temperature in the year (°F)	100.8	Very high
Number of hot months (More 90 °F)	5.2	Very high
Number of extreme hot months (More 100 °F)	2.8	Regular
Medium precipitation (Inches)	0.98	Very low
Min precipitation (Inches)	0.15	Very low
Max precipitation (Inches)	2.62	Very low
Number of rainy months (More 3 Inches)	1.5	Very low
Number of extreme rainy months (More 6 Inches)	—	—

— means the phenomenon is not recorded for the region (e.g. it does not occur), not missing data. Source: NOAA 2025 regional averages.

The region lives in a long hot season: 5.2 months above 90°F (Very high) and up to 100.8°F in the hottest month of the year (Very high), with winters so mild that extreme-cold months (below 32°F) shrink to just 1 (Very low). Rainfall is scarce — a 0.98-inch median (Very low) — with only 1.5 rainy months a year (above 3 inches) and no extreme-rain months at all. Commercially, this extends the selling season for cold beverages, ice cream, HVAC and indoor entertainment well beyond the national norm, compresses the winter-goods season to almost nothing, and keeps outdoor formats and the construction calendar viable nearly year-round — provided they are engineered for heat and shade.

Key climate insights

01

A FIVE-MONTH HOT SEASON EXTENDS COLD-DEMAND CATEGORIES

5.2 months above 90°F (Very high) stretch the season for cold beverages, pools, HVAC and indoor entertainment — the revenue calendar here runs longer than national planning assumes.

02

WINTER BARELY EXISTS

Only 1 extreme-cold month a year (Very low): winter apparel and heating are short-season bets, while construction and outdoor formats operate nearly year-round.

03

HEAT AND DRYNESS AS AN OPERATING COST

One month above 100°F and Very low rainfall impose cooling, shade and irrigation costs — and open demand for landscaping adapted to dry conditions.

> *With the human and climatic context complete, let's look at what is already on the ground — the brands that serve this region and, crucially, how much of it they actually cover.*

06 · COMMERCIAL LANDSCAPE & REGIONAL COVERAGE

What commercial supply exists, which brands dominate it, and how much of the region do they actually cover?

This section maps the businesses and institutions physically present across the region, drawn from the MktCompass directory. Two lenses matter at this scale: how many locations a category has for the region's population (penetration), and in how many of the region's counties each brand actually operates (coverage).

Key categories by volume (Top 10)

Category	Locations	Population per location	Dominant brands
Bakery / Deli / Café	426	14,997	Subway (195), Jimmy John's (45)
Pharmacies	266	24,017	Walgreens (149), CVS Pharmacy (117)
Coffee Shops	225	28,393	Starbucks (203), Dutch Bros. Coffee (7)
Convenience Stores	219	29,171	Mobil (156), Speedway (21)
Pizza	216	29,577	Little Caesars (63), Pizza Hut (44)
Supermarkets	164	38,954	Walmart (62), Safeway (37)
Mobile Phone Shops	148	43,166	Verizon (56), Cricket Wireless (53)
Banks	145	44,059	Wells Fargo (50), Bank of America (32)
Hairdressers	125	51,108	Great Clips (71), Supercuts (38)
Mexican	125	51,108	Chipotle (57), Taco Bell (29)

Brand coverage in the highest-presence categories

Sector	Category	Leading brand	Loc.	Counties	Coverage	Analysis
Restaurants and Bars	Bakery / Deli / Café	Subway	195	5 of 5	100.0%	Very high
Commerce	Pharmacies	Walgreens	149	5 of 5	100.0%	Very high
Food and Beverages	Coffee Shops	Starbucks	203	5 of 5	100.0%	Very high
Commerce	Convenience Stores	Mobil	156	4 of 5	80.0%	High
Restaurants and Bars	Pizza	Little Caesars	63	4 of 5	80.0%	High
Commerce	Supermarkets	Walmart	62	3 of 5	60.0%	Regular
Commerce	Mobile Phone Shops	Verizon	56	3 of 5	60.0%	Regular
Financial Services	Banks	Bank of America	32	4 of 5	80.0%	High
Personal Services	Hairdressers	Great Clips	71	4 of 5	80.0%	High
Restaurants and Bars	Mexican	Chipotle	57	4 of 5	80.0%	High

Commercial landscape insights

01

EVERYDAY CONSUMPTION DOMINATES SUPPLY

Restaurants and Bars (1,037 locations, 33.4%) and Commerce (1,091, 35.1%) dominate the directory, while Health Services registers just 22 branded locations (0.7%) for 6.39 million residents — a strikingly thin formal supply.

02

PENETRATION IS THIN EVEN IN THE DENSE CATEGORIES

Even Bakery / Deli / Café, the deepest category, serves 14,997 residents per location, and Pharmacies 24,017. At regional scale, branded supply has ample room before saturation.

03

REGION-WIDE COVERAGE IS THE EXCEPTION, NOT THE RULE

Starbucks, Walgreens and Subway do cover all 5 counties, but they are the exception: in 32 of the 52 categories analyzed (61.5%), even the best-covered brand reaches no more than 1 or 2 of the 5 counties.

04

THREE HIGH-VOLUME CATEGORIES ARE ALREADY SINGLE-BRAND CONCENTRATED

Starbucks holds 90.2% of Coffee Shops, Walgreens 56.0% of Pharmacies and Mobil 71.2% of Convenience Stores — with coverage of 4 or 5 of the 5 counties, these three categories are already institutionalized.

> *The supply map is clear. Now the critical question: given this population, this climate and this coverage pattern, where is the regional white space?*

07 · REGIONAL DEMAND HYPOTHESES & WHITE SPACE

Which categories appear under-penetrated or under-covered, given this region's profile?

How to read this section. Without localized-employment data or an opportunity block, these are demand hypotheses, not quantified gaps. Penetration (population per location) says how thin a category is; coverage (counties with presence) says how much of the region its brands actually serve. Destination and specialty categories are judged at full regional scale; convenience categories only get a density read — their real market is a 3–5 minute isochrone this report cannot see — and must be validated with an urban isochrone study in the specific county or city of interest.

Regional penetration by category

Sector	Category	Locations	Population per location	Penetration read
Health Services	Clinics	22	290,387	Looks very thin: just 22 branded locations (290,387 residents per location) against 647,317 uninsured residents in the region.
Personal Services	Fitness Centers	3	2,129,506	Extremely thin: only 3 locations from a single brand (YMCA) for 6.39 million residents — 2,129,506 residents per location.
Commerce	Furniture Shops	28	228,161	Looks thin for the volume of newly forming households: 28 locations, 228,161 residents per location, and the leader is a rent-to-own brand, not a full-line retailer.
Commerce	Supermarkets	164	38,954	Looks proportionate in the core but thin in the outlying counties: 164 locations fragmented across 17 real brands, at 38,954 residents per location.
Tourism & Attractions	Hotels	32	199,641	Destination-scale read: 32 locations (199,641 residents per location) look thin for a multi-county region with military rotation.
Food and Beverages	Coffee Shops	225	28,393	Density read only (convenience category): 225 locations look dense for the region, but its real market is a 3-5 minute isochrone this report cannot see.

Coverage white space

Category	Leading brand	Loc.	Counties covered	White-space read
Clinics	Passport Health	9	1 of 5	Passport Health, the best-covered brand, covers only 1 of 5 counties; 4 counties have no supply from that brand.

Category	Leading brand	Loc.	Counties covered	White-space read
Fitness Centers	YMCA	3	1 of 5	YMCA, the category's only real brand, covers 1 of 5 counties; 4 counties have no branded supply at all in fitness.
Furniture Shops	Rent-A-Center	6	2 of 5	Rent-A-Center, the best-covered brand, covers 2 of 5 counties; 3 counties have no supply from that brand.
Supermarkets	Walmart	62	3 of 5	Walmart, the best-covered brand, covers 3 of 5 counties; 2 counties depend on other chains or on independents outside its footprint.
Hotels	Hilton	8	3 of 5	Hilton, the best-covered brand, covers 3 of 5 counties; 2 counties have no supply from that brand.
Beauty Salons	Ulta Beauty	3	3 of 5	Ulta Beauty, the best-covered brand, covers 3 of 5 counties; 2 counties have no supply from that brand.

Interpretation matrix: penetration + coverage

Penetration read	Coverage of existing brands	Conclusion for the investor
Looks thin	No brand covers the region	Open regional white space. Strong case for a first mover or franchise rollout.
Looks thin	Brands only in core counties	Expansion white space: serve the uncovered counties before the incumbents do.
Looks proportionate	Fragmented among independents	Formalization opportunity for a branded, standardized multi-unit player.
Looks proportionate	Region-wide chains	Mature market. Entry only with clear differentiation.
Looks dense	One brand dominates coverage	Saturation by a dominant player. Enter only with a radically different proposition.
Looks dense	Multiple region-wide chains	Institutionalized market. High entry cost, compressed margins.

Demand-hypothesis insights

01

THE CLEAREST WHITE SPACE: ACCESSIBLE HEALTH SERVICES

22 branded clinics, coverage of just 1 of 5 counties by the leader, and 647,317 uninsured residents: urgent care, dental and vision concepts face a region with almost no formal competition. Tentative — validate locally.

02

SECOND WHITE SPACE: FITNESS IS PRACTICALLY ABSENT

A single brand (YMCA, 3 locations) covers just 1 of 5 counties in a region of 6.39 million residents with 39.6% of the population aged 20-49. Tentative — validate locally.

03

SATURATION SIGNAL: COFFEE, PHARMACIES AND CONVENIENCE

Starbucks (90.2% of the category), Walgreens (56.0%) and Mobil (71.2%) already cover 4 to 5 of the 5 counties — institutionalized categories where entering without a radically different proposition competes on price against scale.

04

DESTINATION-SCALE OPPORTUNITY: LODGING FOR A MULTI-COUNTY REGION

32 branded hotels (199,641 residents per location) look thin for a region this size with interstate corridors and military rotation; midscale hospitality is evaluable at full regional scale.

05

VALIDATION REMINDER

These are hypotheses from county-level ACS demography, NOAA climate and POI coverage — not quantified gaps. The next step is an urban isochrone study in each target county or city.

> *With the regional white space mapped, we reach the core of the report: the specific business recommendations, ranked by probability of success — as hypotheses to validate.*

08 · STRATEGIC BUSINESS RECOMMENDATIONS

Which businesses have the highest probability of success in this region, as hypotheses to validate?

Based on the integrated read of demand, coverage and climate, we identify the categories with the highest probability of success in this region. These are hypotheses to validate with field research, not quantified gaps.

1

Accessible health clinics (urgent care / dental / vision). Only 22 branded clinics serve a region with 647,317 uninsured residents (10.3%, High) and a $74,296 median able to pay out of pocket for convenience. Coverage white space spans 4 of the 5 counties, bounded to the best-covered brand (Passport Health). The differentiator: transparent pricing and bilingual service for the region's 473,658 Spanish-speaking households. Hypothesis to validate with an urban isochrone study per target county.

Income tier: Middle / value | Age: 20-49 | Competition: LOW | Coverage white space: 4 of 5 counties | Seasonality: All-year

2

Mid-format fitness centers. A single brand (YMCA, 3 locations) covers just 1 of the 5 counties in a region where 39.6% of the population is 20-49 years old (2,526,187 people) and professional/management occupations rate Very high (42.3%). Coverage white space spans 4 of the 5 counties. The format requires significant capital, given the equipment- and real-estate-intensive nature of the business. Hypothesis to validate.

Income tier: Middle+ | Age: 20-49 | Competition: LOW | Coverage white space: 4 of 5 counties | Seasonality: All-year

3

Full-line home furnishings. The category's current leader (Rent-A-Center, rent-to-own) covers only 2 of the 5 counties, leaving a full-line operator open space in 3. The region counts 2,962,726 residents born in another U.S. state (Very high, 46.4%) versus only 38.9% born in Arizona — households forming and furnishing for the first time in the region. Hypothesis to validate.

Income tier: Middle | Age: 25-44 | Competition: LOW | Coverage white space: 3 of 5 counties | Seasonality: All-year, with a peak in the spring-summer moving season

4

Beauty and personal-care services. The category is fragmented across 6 real brands with no dominant leader: the best-covered brand (Ulta Beauty) reaches only 3 of the 5 counties. The high income tail (Very high, 12.5% of households at $200,000+) and the professional occupational profile support the category. Hypothesis to validate.

Income tier: Middle+ | Age: 20-49 | Competition: MEDIUM | Coverage white space: 2 of 5 counties | Seasonality: All-year

5

Mid-format supermarkets in outlying counties. Even Walmart, the coverage leader, leaves 2 of the 5 counties without its own stores, and the category is fragmented across 17 real brands. This is a weekly-frequency category protected by distance, so the outlying-county shortage does not depend on destination trips to the core. Hypothesis to validate.

Income tier: Broad (all tiers) | Age: All | Competition: MEDIUM | Coverage white space: 2 of 5 counties | Seasonality: All-year

6

Midscale and extended-stay lodging. 32 branded hotels (199,641 residents per location) look thin for a multi-county region with a military presence (Armed Forces Very high, 16,323 residents) and a high volume of newcomers from other states. The differentiator: extended-stay formats for households in the process of relocating while they search for permanent housing. Hypothesis to validate.

Income tier: Middle | Age: 25-55 | Competition: MEDIUM | Coverage white space: 2 of 5 counties | Seasonality: All-year

Seasonality and peak windows by business type

Business type	Peak season (months)	Peak days & hours	Consumer type
Cold beverages / ice cream / HVAC	May-September (5.2 hot months)	Daily, 12:00-20:00	Families, commuters, remote workers
Accessible health clinics	All year	Mon-Sat, 9:00-19:00	Uninsured residents and newcomers without an established provider
Fitness / indoor recreation	All year	Mornings and evenings, every day	Residents aged 20-49
Home furnishings / moving	All year, with a spring-summer peak	Weekends	Newly arrived households setting up residence

These are inferences based on climate, commute patterns and category type — not measured foot traffic.

DISCOURAGED without strong differentiation or a prime location:

- Coffee Shops (225 locations) — Starbucks already covers all 5 of 5 counties and holds 90.2% of the category; entering without a radically different proposition competes on price against an already region-complete brand.
- Pharmacies (266 locations) — Walgreens covers all 5 of 5 counties with 56.0% of the category; already an institutionalized category at regional scale.
- Convenience Stores (219 locations) — Mobil covers 4 of 5 counties with 71.2% of the category; high brand concentration leaves little room without a distinct proposition.
- Bakery / Deli / Café (426 locations) — the highest-volume category in the whole directory and the lowest population per location (14,997); supply density is already high even though it is fragmented across 16 brands.

Key success factors in this region

- Bilingual service end to end, because 19.2% of households (473,658) speak Spanish at home.
- Highway-corridor access format, because 37.8% of employed residents commute 30 minutes or more (917,219 people).
- Early opening hours, because 38.7% of employed residents leave before 7:00 a.m.
- Heat-engineered design — shade, cooling, extended patio hours — because the region has 5.2 months above 90°F.
- A county-coverage strategy over single-site thinking, because in 32 of the 52 categories analyzed, even the best-covered brand concentrates in just 1 or 2 of the 5 counties.
- A focus on the newcomer segment, because 46.4% of residents were born in another U.S. state (2,962,726 people) versus 38.9% born in Arizona.

> *With the recommendations clear, it is essential to understand how this region is classified and the commercial risks to weigh before investing.*

09 · REGIONAL CLASSIFICATION & RISKS

How is this region classified and what commercial risks should you know before investing?

Region classification

Region type	METRO-ANCHORED — a metropolitan core in Maricopa County (Phoenix) with outlying counties inside a 100-mile radius; 91.0% housing occupancy.
Consumption capacity	HIGH — median $74,296 with dominant bracket $60,000-$99,999 (23.1%) and 41.4% of households above $100,000.
Resident profile	Young-productive (20-49 years, 39.6%), highly educated (35.2% bachelor's degree or higher), majority born in another U.S. state (46.4%), with a sizable Hispanic and bilingual community, car-dependent with a large remote-work base.
Commercial maturity	MIXED — 3,106 branded locations concentrated in dining and commerce; 44 brands already cover half or more of the 5 counties, but in 32 of the 52 categories analyzed even the best-covered brand is limited to 1 or 2 counties.

Main commercial risks

Commercial risk	Level
Regional averages blend the Maricopa metro core with more rural outlying counties	**High**
Metropolitan-destination risk: the core already concentrates established regional shopping destinations (e.g. Scottsdale Fashion Square, Biltmore Fashion Park, Desert Ridge Marketplace); in comparison and specialty categories, outlying-county scarcity may reflect destination trips to the core rather than unmet demand	**Medium**
Coffee, pharmacies and convenience stores are already concentrated and cover most counties, raising the cost of entry in those categories	**Medium**
Demand hypotheses are unquantified without an urban isochrone study	**Medium**
Data reflect 2024-2025 survey estimates and may not capture recent changes	**Low**

> *The risks are on the table. Before closing, let's review the social dimension of this region — because education, health coverage and community composition open opportunities that few investors consider.*

10 · SOCIAL CONSIDERATIONS

What social data open opportunities for businesses with positive community impact?

Market analysis cannot ignore a region's social profile. These data reveal both responsibilities for businesses that locate here and opportunities for models with positive community impact and proven commercial return.

Education and human capital

Educational attainment (25+)	People	% of 25+
Regular High School Diploma	826,570	18.7%
Associate Degree	407,779	9.2%
Bachelor Degree	946,608	21.5%
Master Degree	434,313	9.9%
Professional Degree	98,259	2.2%
Doctorate Degree	71,893	1.6%

Health coverage and access

Coverage indicator	People	% of total
Private health insurance Employer-based only	2,837,236	45.0%
Public coverage only	1,581,420	25.1%
Public coverage Medicaid/means-tested only	875,662	13.9%
Population with no insurance	647,317	10.3%

Community structure

Indicator	People / households	% of total
Largest group: White population	3,409,179	53.4%
Foreign-born residents	845,949	13.2%
Households speaking a language other than English	659,910	26.8%
Married, except separated	2,496,814	47.5%
Never married	1,807,508	34.4%

Key social insights

01

ACCESSIBLE HEALTH SERVICES AS A MARKET

647,317 uninsured residents (10.3%) and 875,662 on Medicaid (13.9%): an accessible private health offering reaches an underserved, loyal segment across the region's counties.

02

AN EDUCATED MARKET RECEPTIVE TO QUALITY

35.2% of adults 25+ hold a bachelor's degree or higher (bachelor, master, professional and doctorate all rate Very high): training, enrichment and premium services have latent demand.

03

COMMUNITY INTEGRATION AND WORD OF MOUTH

473,658 Spanish-speaking households and 845,949 foreign-born residents (both Very high), in a region where 46.4% of residents arrived from another state: language-access and newcomer-orientation services build loyalty, and already-established networks amplify word of mouth.

> *With the full picture of demand, coverage, climate, risks and opportunities, we reach what truly matters: the actionable conclusions and concrete next steps.*

11 · CONCLUSIONS & NEXT STEPS

The region in 3 data points

$74,296 median	Fragmented coverage	The opportunity is in coverage
A 6.39 million-resident region with 41.4% of households above $100,000.	3,106 branded locations, but in 32 of the 52 categories analyzed the leader covers only 1 or 2 of the 5 counties.	Accessible health, fitness and home furnishings face open regional white space.

The best bets — Opportunity traffic light

Recommended category	Opportunity	Competition & coverage
Accessible health clinics	**HIGH**	Low — the leader (Passport Health) covers 1 of 5 counties
Fitness centers	**HIGH**	Low — no brand covers the region (YMCA, 1 of 5 counties)
Home furnishings (full-line)	**HIGH**	Low — the rent-to-own leader covers 2 of 5 counties
Beauty and personal-care services	**MEDIUM**	Medium — fragmented, the leader covers 3 of 5 counties
Mid-format supermarkets in outlying counties	**MEDIUM**	Medium — the leader covers 3 of 5 counties

● HIGH opportunity (thin penetration + coverage white space + aligned income) ● MEDIUM opportunity (real demand but higher competition or investment). All figures are hypotheses to validate.

The 2 risks you cannot ignore

Risk 1 — Averages hide the core/periphery split

The $74,296 median blends the Maricopa metro core with more modest outlying counties. A premium concept priced off the regional average will fall short in the outlying counties; validate county by county.

Risk 2 — The metro core is already a consolidated destination

Coffee, pharmacies and convenience already cover most counties from dominant brands. Entering the core without differentiation means competing against already-institutionalized players; the white space runs outward, not inward.

Letter to the Investor

Letter to the Investor

We see in this region what expansion-minded investors look for: a young, fully employed market with real purchasing power, a bilingual community that rewards whoever serves it in its own language, and a steady stream of newcomers still forming their consumption habits.

The challenge is not demand — it is coverage. The dominant brands have already claimed coffee, pharmacies and convenience stores, but left accessible health, fitness and home furnishings practically uncovered outside one or two counties. The correct strategy is not to fight the incumbents in the categories they have already won; it is to serve what they have not yet touched.

The region is bigger than its core. Cover it.

Recommendations for deeper study

- Urban isochrone studies (MktCompass Urban US) in the specific counties or cities of interest, at the time appropriate to each category (3–5 min convenience, 5–10 comparison, 10–15 specialty), to quantify the supply gaps this regional report can only hypothesize.
- County-by-county comparison of the shortlisted categories before choosing the entry county.
- Consumer-habits surveys and interviews in the target counties: validate what residents buy, where, how often, and what is missing.
- Mystery-shopper visits to existing competitors in the categories of interest, in core and outer counties.
- Vehicle counts on the highway corridors of interest to estimate real traffic across hours and seasons.

LEGAL NOTICE The data presented come from surveys and statistical records with specific reference periods (ACS 2024, NOAA 2025) and may not reflect changes since then. County-level aggregation blends distinct submarkets inside the region. This report does not include a qualitative assessment of market potential or a direct evaluation of existing competitors, and it does not quantify supply gaps (which require an urban isochrone study). The opportunities identified are indicative and must be validated with field research before any investment decision. MktCompass does not guarantee commercial results.

Regional geomarketing · Greater Phoenix Region · Phoenix, AZ | ACS 2024 (U.S. Census Bureau) + NOAA 2025 + MktCompass