



CITY OF
FLAGSTAFF



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FLAGSTAFF

STILETTO

CITY OF FLAGSTAFF

ECONOMIC DEVELOPMENT STRATEGY

2024-29

APRIL 2024



EXECUTIVE SUMMARY

A picturesque, culture-rich past. A welcoming, resilient present. A vibrant, sustainable future.

Flagstaff is one of those special places in North America that has moved wholeheartedly into the future while celebrating its past. Globally known for its beautiful landscapes and lively community, Flagstaff is also recognized for its commitment to protecting its physical and human resources with thoughtful and collaborative planning.

Over the years, this resource management practice has been central in growing and maintaining a vital environmental, economic, and social outlook. This tradition makes Flagstaff both contemporary and conscientious, and the Economic Development Strategy 2024-29 continues in this approach.

This strategy builds on the tourism strengths of Flagstaff, recognizing these assets as an essential foundation for many economic goals. With tourism as a driving force, the primary focus of the current strategy is how to promote diversity and growth in other areas of the economy, to ensure that Flagstaff achieves balanced and sustainable growth.

This strategy will provide essential guidance to regional leaders across industry, government, and educational institutions in planning activities that have strategic economic value for the region. Specifically, the community aspires to the following outcomes:

- **Within the next year:** Become more collaborative, balanced, focused, resilient, forward-thinking, viable, vibrant, and united.
- **Over the next five years:** Develop clarity of purpose and growth to achieve overall stability, with an increased sense of focus and tangible outcomes.
- **Over the next 10 years:** Be vibrant and moving ahead, with improvements, innovations, and a shared identity rooted in growth targets.

Together, these targeted outcomes culminate in an overarching mission and vision for the Flagstaff Economic Development Strategy:

MISSION :

To support and enhance economic growth and well-being for all.

VISION :

The City of Flagstaff has a diverse and resilient economy with a united community that promotes sustainable growth, innovation, and opportunity.

By collaborating in new ways, aligning development strategies with higher education institutions, and bringing together innovation ecosystem and community leaders, Flagstaff will accelerate a long-term sustainable growth agenda for

all. With the economic development priorities of business attraction, business retention and expansion (BR&E), infrastructure development, and workforce development, the strategy presents recommendations across four pillars.

Figure 1: Strategic pillars, City of Flagstaff Economic Development Strategy 2024-29¹



Source: Stiletto Analysis

These pillars incorporate the city's greatest assets and opportunities. Behind these pillars are five priority sectors, selected after analyzing local industry, business, workforce, and population strengths / trends: astronomy, food processing, forestry products, biomedical / health care, and advanced manufacturing. By focusing on these sectors, the community can maximize its resources to drive growth that will benefit everyone.

As Flagstaff evolves, so does the state, the country, and the globe. Flagstaff must prepare for advances in technology, innovation, and international trade that were not on the radar even 10 years ago. The forces that drive this growth can often be contradictory:

export versus local sustainability, entrepreneurs versus established firms, and historical industries versus emerging technologies.

In this process of evolution, Flagstaff has many advantages - chief among them is its diverse, tight-knit community. The interest and input of relevant groups throughout the planning process is a testament to the community's culture of thoughtful engagement.

With the community's ongoing involvement, Flagstaff is poised to move toward a bright, sustainable future.

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M E T H O D O L O G Y

REPORT SCOPE

This report presents an integrated Economic Development Strategy 2024-29 for the City of Flagstaff and its Economic Vitality division. The goal of this strategy is to leverage the City of Flagstaff value proposition, competitive advantages, and strategic initiatives to position the city as an ideal location to live, work, and invest. This anchor strategy is intended to unify the positions of community members, businesses, and other strategic audiences.

Behind the scenes, more than 34,000 data points were collected and reviewed as part of the planning process to identify strengths, capacities, and assets

in the community. Primary research included the following components:

- A survey of the business and residential community, with 490 responses collected; and
- Focus groups with seven interested / relevant groups.

Secondary data included key market trends, impacted sectors, strategy reports, and other substantive information. Analysis of these data has also been considered in the formulation of the report's recommendations.

ABOUT STILETTO

Stiletto: Make a Point (Stiletto Consulting Ltd.) is an economic development, market research, and strategic planning firm that generates meaningful, lasting impacts in the communities and organizations it serves. Working at the intersection of government, industry, and academia, Stiletto develops evidence-based and results-driven strategies that help communities come together to maximize their strengths.

FLAGSTAFF AT A GLANCE

As part of the strategic planning exercise, a variety of data points were gathered and analyzed. Figure 2 provides a summary of key facts.

Figure 2: Key facts overview, City of Flagstaff, 2018-23²

INDICATOR	GEOGRAPHY	DATA	DATE
Population ³	Coconino County	149,647	2022
Population, forecasted (2027) ⁴	Coconino County	153,531	2022
Working age population (ages 15 to 64) ⁵	City of Flagstaff	69,149	2022
Cost of living index ⁶	Flagstaff MSA	107.4	2023
Total new jobs projected (2022-27) (%) ⁷	City of Flagstaff	5.9	2022
Total new jobs projected (2022-27) (#) ⁸	City of Flagstaff	3,127	2022
People working from home (within the area) (%) ⁹	Coconino County	15.7%	2021
Median household income ¹⁰	City of Flagstaff	\$61,026	2023
Unemployment rate (%) ¹¹	City of Flagstaff	4.5%	2023
Percentage of self employed ¹²	City of Flagstaff	6.6%	2022
Total enrollment, Northern Arizona University (NAU) ¹³	All Campuses	28,194	2023 (Fall)
Total enrollment, Coconino Community College (CCC) ¹⁴	All Campuses	2,535	2022 (Fall)
Number of businesses ¹⁵	Flagstaff MSA	3,966	2023
Total GDP ¹⁶	Flagstaff MSA	\$9.1 billion	2022
GDP per capita ^{17,18}	Flagstaff MSA	\$63,031	2022
Average commute time ¹⁹	City of Flagstaff	15.6 minutes	2018-22

Source: Stiletto Analysis

Note: In this figure, "City of Flagstaff" refers to the geographical coverage of a combination of six ZIP codes that best approximate the City of Flagstaff (ZIP codes include: 86001, 86002, 86003, 86004, 86005, 86011). When the "Flagstaff MSA" is referenced, it is due to a) data constraints at the ZIP level or b) consistency as a comparator to other metropolitan statistical areas (MSA).

LEVERAGING STRENGTHS

THE CITY OF FLAGSTAFF VALUE PROPOSITION

No other city has the same combination of natural beauty, proximity to large markets, and economic resilience.

Flagstaff has nearly 6.0 million visitors a year²⁰ and generates over \$930.2 million in GRP earnings from arts, retail, and tourism-related industries.²¹ Just as

importantly, the beauty and opportunity of Flagstaff make it an attractive location for workers and families seeking the ultimate work-life balance.



NATURAL BEAUTY AND OUTDOOR RECREATION OPPORTUNITIES

A popular destination for its dazzling starry nights, fantastic restaurants, and historical attractions, Flagstaff is an ideal home for those seeking the ultimate work-life balance. The city offers four bright seasons with the number of sunny days well over the national average,²² good air quality, and an enviable rating as one of the best places to live in the U.S.²³



PROXIMITY TO LARGE MARKETS (NOTABLY, PHOENIX, LAS VEGAS, CALIFORNIA)

Flagstaff is a hub for transport in Northern Arizona, served by major highways including interstate highways 40 and 17, and U.S. Route 66. Rounding out its infrastructure assets is rail connectivity, including daily Amtrak passenger rail service, the Flagstaff Pulliam Airport, and comprehensive bus routes covering the city and its surroundings.



ECONOMIC RESILIENCE AND OPPORTUNITY

Flagstaff is ranked among the best performing small U.S. cities for economic resilience and opportunity (Milken Institute, 2022).²⁴

OTHER DIFFERENTIATORS

Flagstaff further differentiates itself from other U.S. and Arizona communities with the following strengths:

THRIVING TOURISM SECTOR

Leisure and hospitality is a \$930.2 million industry in Flagstaff, employing more than 11,227 workers and attracting over 9.3 million visits to hotels and restaurants (2022).²⁵ International tourists visit the Grand Canyon National Park, Coconino County National Forest, as well as cultural and educational attractions such as the Museum of Northern Arizona and Lowell Observatory.

A VIBRANT COMMUNITY WITH SMALL-TOWN CHARM

A diversity of ethnicities and languages are found in the city, including substantial Hispanic (14.7%) and Native American (10.3%) populations (2023), with Navajo, Hopi, and Havasupai reservations.²⁶ The city also hosts a large contingent of seasonal residents (close to 18.0% of homes in the city are second homes).²⁷

ATTRACTIVE WORK-LIFE BALANCE

The region has become a destination of choice for people seeking an active, outdoor lifestyle. As Choose Flagstaff recently stated, “While demographics may change over time, Flagstaff continues its small-town traditions, with a diverse community of people who truly love the land. We are known in many ways—as a college town, a ski town, a mountain town, and an outdoor town—all of which attract an interesting mix of people, in both our workforce and our visitors.”²⁸

HIGHLY EDUCATED WORKERS

The city has a population of 93,925 (2022),²⁹ many of them young and highly educated (39.7% have a bachelor’s degree or higher).³⁰ In fact, in the broader region, almost one-quarter (23.6%) of Flagstaff MSA residents possessed a bachelor’s degree in 2022 (2.7% above the national average). With a substantial 17.1 percent of the city’s population aged 20 to 24 versus 6.8 percent nationwide (2022), Flagstaff can solidify future workforce strengths by nurturing its youth through higher education. Home to Northern Arizona University (NAU) and Coconino Community College (CCC), the community benefits from a strong emphasis on STEM (science, technology, engineering, and math), and has been named “America’s First STEM Community.”³¹

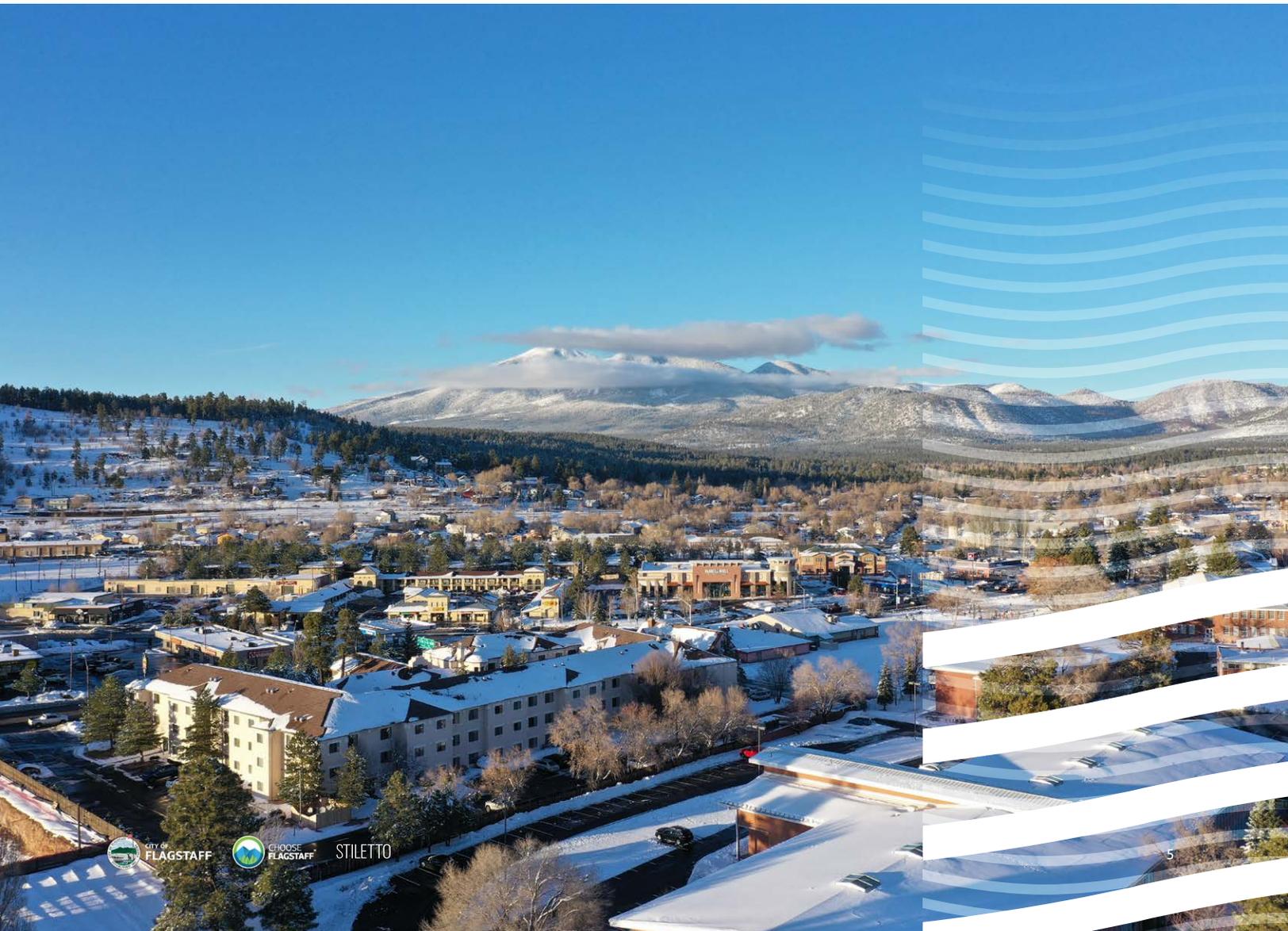
**ENGAGED
ECONOMIC
DEVELOPMENT
ECOSYSTEM**

Flagstaff is home to a strong economic development ecosystem, including entrepreneurship programming, business attraction incentives, and a network of research assets that can be leveraged for innovation and commercialization opportunities. In addition, one-third of businesses surveyed for the strategy indicated they plan to expand in the near future.

**FUTURE-
FOCUSED
PLANNING AND
PRINCIPLES**

The Flagstaff Regional Plan 2030 articulates eight guiding principles for future development that feature the themes of environment and sustainability, people and place, trust and transparency, and connection, cooperation, and prosperity.³²

Source: Stiletto Analysis



T H E N E E D

Flagstaff is a future-forward city that has succeeded by adopting new approaches while preserving its remarkable history and character. The City of Flagstaff Economic Development Strategy 2024-29 recognizes several opportunities and needs that will shape the community's next steps.

Nurturing the environment: Flagstaff recognizes that the health of the environment is essential to all other city goals. An economic strategy must chart a path forward that enhances and protects the region's natural resources.

Ensuring sustainability: Both environmental and economic sustainability are top of mind for the community. A strategy is needed to guide the community in making sound decisions that will have lasting benefits.

Promoting a smart and connected community: Flagstaff strives to be ahead of the curve in its adoption of smart site design and energy conservation and efficiency. Economic development can leverage work in this area to take advantage of government incentives and attract needed new investment. These approaches will also support the city's commitment to environmental sustainability.

Balancing development with unique character: Community character matters and is important in every development project. New development efforts must preserve the strong historical sense of place and promote community cohesion. Plans must consider

the interaction between business needs and public facilities and infrastructure resources.

Cultural sensitivity: Native American tribes and local Indigenous cultures have extensive histories in the region, with countless sacred sites and historical landmarks. Economic planning must engage local tribes in discussion and decision-making to ensure that these communities are full participants in continued growth.

Supporting economic well-being: Flagstaff is eager to address pressing challenges associated with housing costs, transportation, and the high cost of living. Partnerships with anchor businesses and organizations must be continued and expanded to assist the city in attracting high-quality employment opportunities and related economic spin-offs.³³

Leveraging federal funding: Flagstaff is the site of development and research funded by major federal funds, including:

- A \$32.5 million federal grant from the Bipartisan Infrastructure Act supporting the Downtown Mile project to boost pedestrian safety and streamline infrastructure;³⁴
- A \$26 million project with cutting-edge research being conducted through the Center for Quantum Networks³⁵ funded by the National Science Foundation;³⁶ and
- Ongoing R&D expenditures by NAU that drive advancements in a range of fields.³⁷

The Economic Development Strategy 2024-29 needs to leverage these opportunities (and similar future

initiatives) to strengthen priority sectors and build new partnerships.

STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS (SWOT)

A summary of current strengths, weaknesses, opportunities, and threats (SWOT) has been created (Figure 3) to highlight important aspects to be considered in the City of Flagstaff economic development process. The SWOT analysis is a critical part of the strategy as it illuminates regional vulnerabilities to environmental shocks and guides subsequent economic development initiatives toward enhanced resiliency and sustainability.

SWOT analyses go beyond the purely economic to capture important current trends and issues. For example, many participants in community outreach said that affordable housing and accessible child care were essential to the successful implementation of the strategy. These components, while not directly in the purview of economic development, have an important impact on the community's capacity for growth. Taking a comprehensive view, the SWOT is designed to support decision-makers in assessing current capabilities and navigating future uncertainty.



Figure 3: SWOT, City of Flagstaff, 2024³⁸

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Large economic development ecosystem: 21 agencies delivering support programs / services³⁹ • Support for innovation and commercialization: Eight research organizations at NAU⁴⁰ • Highly educated workforce: Large percentage of workforce with bachelor’s level education (26.7% of the workforce or 2.7% above the national average)⁴¹ • Youthful population: The largest age cohort is 20 to 24 years (13.9% of the total population)⁴² • Outdoor recreation strengths: Employment share in nature parks and similar institutions is 25 times the national share⁴³ • Workforce strengths: Industries related to health care reveal high employment concentrations in the City of Flagstaff, with strengths in surgical appliances and supplies manufacturing⁴⁴ 	<ul style="list-style-type: none"> • City is built up: Low availability of land and properties for commercial use⁴⁵ • Housing affordability is an issue: Low availability of affordable housing stock⁴⁶ • Historic workforce strengths are changing: Significant employment concentration in Surgical appliance and supplies manufacturing has seen a decline (328 job decrease 2017-22)⁴⁷ • Inconsistent internet availability: Access to high-speed broadband is a challenge in some areas⁴⁸ • Municipal processes as a barrier: Perceived “red tape” / “unpredictable process” by business community regarding city policies⁴⁹
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Great champions: Mayor and Council supportive of economic development⁵⁰ • New infrastructure underway: John Wesley Powell Boulevard expansion corridor servicing 2,200 acres (commercial / residential)⁵¹ • Potential investment attraction: Within emerging industries of priority sectors (astronomy, food processing, forestry products, biomedical / health care, and advanced manufacturing)⁵² • Trade opportunities and guidance available: Export support for expanding businesses⁵³ • Strategic interdepartmental alignment: Integrate and increase coherence amongst economic development, community development, housing, and climate strategies with mutually reinforcing policies and activities⁵⁴ • Existing assessment practices: Develop metrics and goals to support sustained economic growth⁵⁵ • Higher-than-average minimum wage (\$18 / hour) supports the economic security of individuals in minimum wage jobs, promoting talent attraction and retention⁵⁶ 	<ul style="list-style-type: none"> • Affordable housing, inaccessible child care, and cost of living have been identified as key challenges to attraction and retention⁵⁷ • Low awareness of city economic development resources: Survey respondents are unaware of options⁵⁸ • “Resort town” image: Growing concern among ecosystem leaders of city branding and perception amongst potential investors⁵⁹ • Lack of project coordination among key ecosystem players for economic development⁶⁰ • Student incompletions rising: Higher education completions are declining (-25%, 2018-22)⁶¹ • Strong impact of inflation: Comparatively high cost of living (second highest in state of Arizona)⁶² • Higher-than-average minimum wage (\$18 / hour) can put local business owners at a relative disadvantage, as they may struggle to absorb the additional labor costs⁶³

Source: Stiletto Analysis



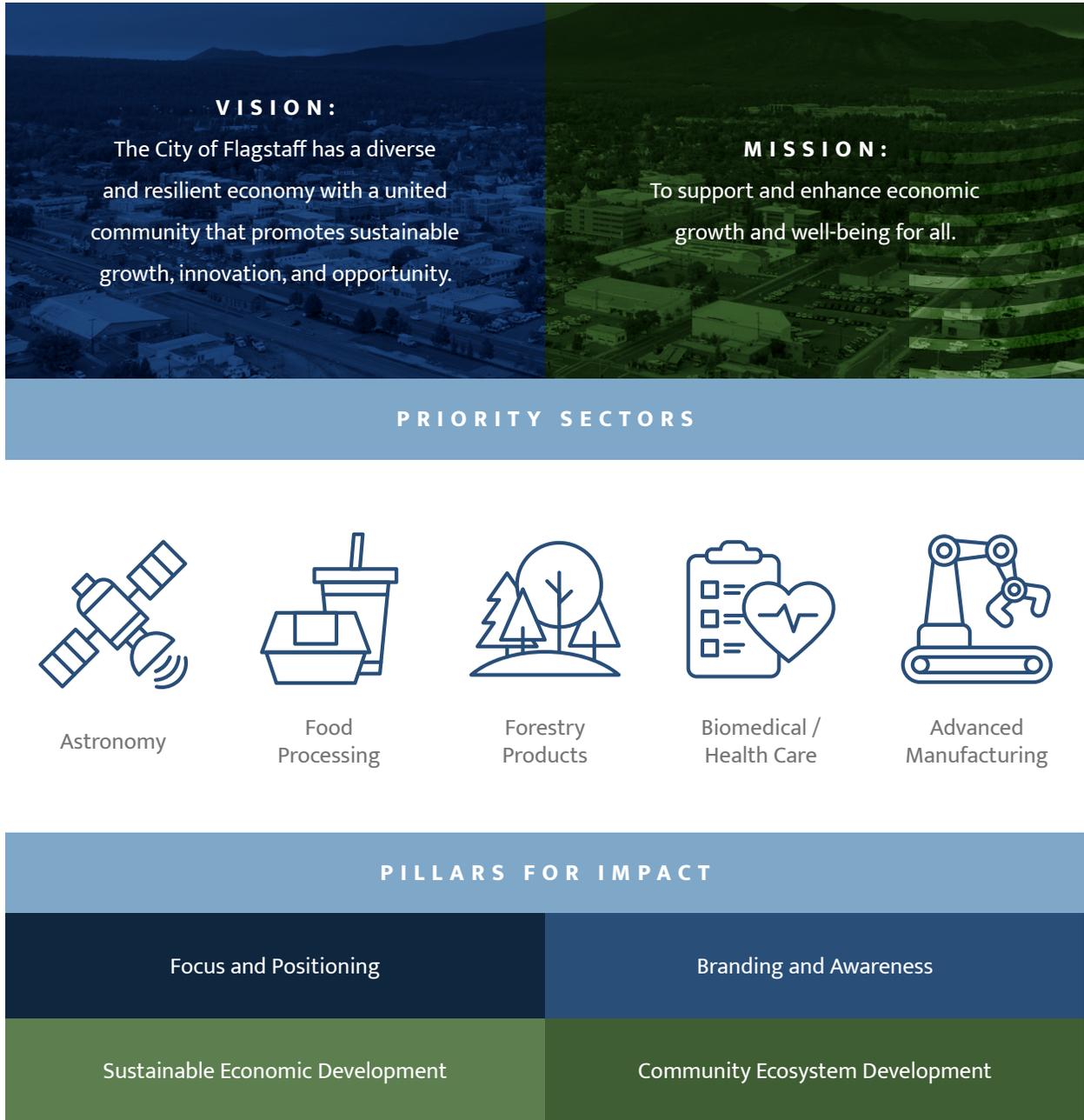
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THE STRATEGIC FRAMEWORK

Responding to identified needs and leveraging assets, the Economic Development Strategy 2024-

29 provides a pathway to sustainable growth and greater economic well-being for everyone in Flagstaff.

Figure 4: City of Flagstaff Economic Development Strategy Framework, 2024-29⁶⁴



Source: Stiletto Analysis

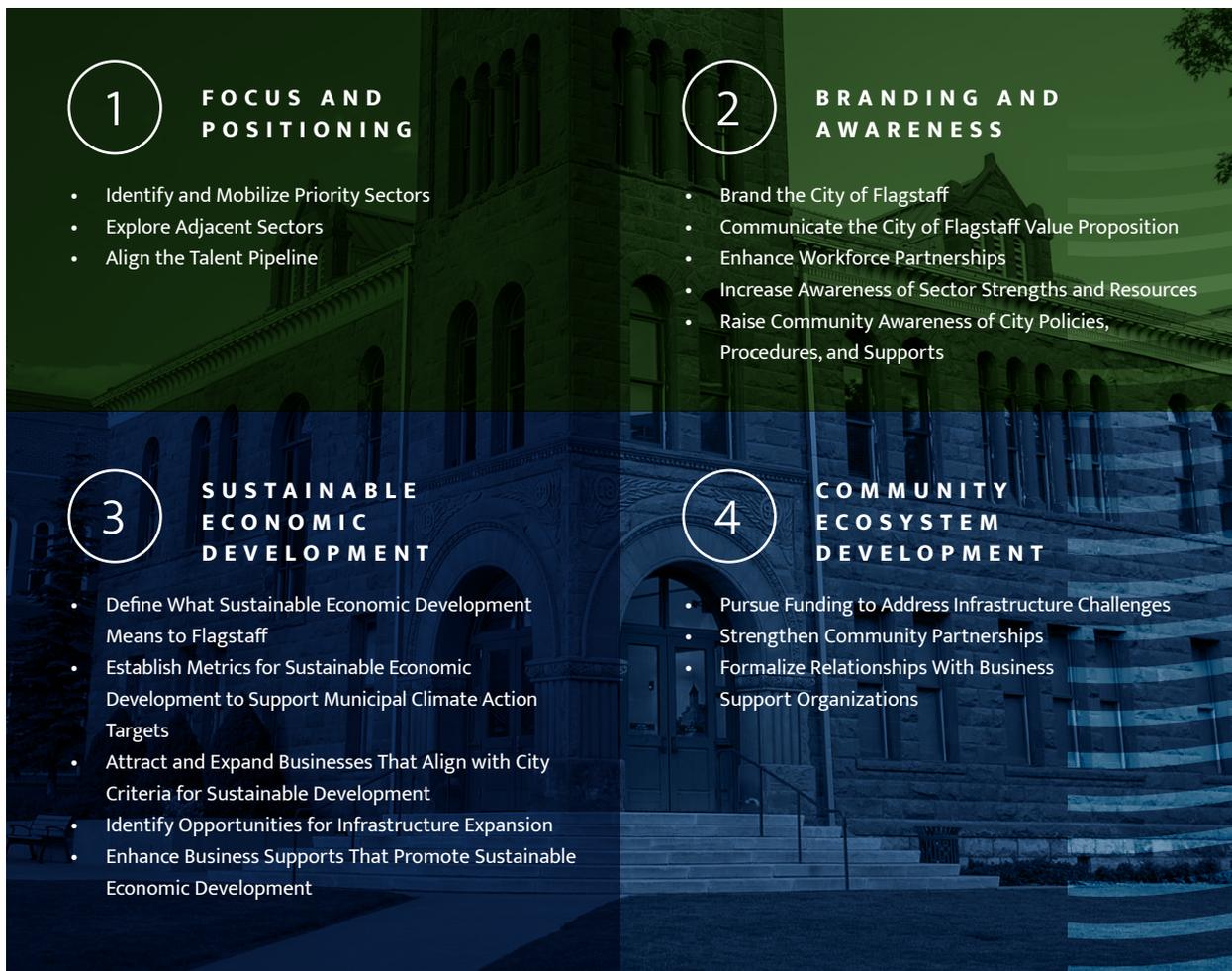
THE STRATEGIC PILLARS

Recommendations are organized into four thematic pillars: **Focus and Positioning, Branding and Awareness, Sustainable Economic Development, and Community Ecosystem Development.**

Supporting these pillars are five priority sectors, selected after analyzing local industry, business, workforce, and population strengths / trends: astronomy, food processing, forestry products, biomedical / health care, and advanced manufacturing.

Within each pillar, recommendations are provided along with specific tactics to support the implementation of the recommendations. These pillars incorporate the city's greatest assets and opportunities.

Figure 5: Pillars and recommendations at a glance, City of Flagstaff Economic Development Strategy 2024-29⁶⁵



Source: Stiletto Analysis

1

PILLAR ONE: FOCUS AND POSITIONING

Focusing on a few priority sectors will help the City of Flagstaff maximize its efforts and impact over the next five years. Priority sectors have been chosen by reviewing areas of strength for the City of Flagstaff. Promoting and enhancing these sectors can help drive business attraction, retention, and expansion in the city, county, and beyond.

Recommendations

1. Identify and Mobilize Priority Sectors

- Five priority sectors have been identified for Flagstaff (astronomy, food processing, forestry products, biomedical / health care, and advanced manufacturing). Based on primary validation and market demand as observed in the first two years of implementation, the sector focus should be narrowed further to three sectors. With clear priority sectors, the city can develop targeted branding and partnership opportunities with the top two to three sectors.
- Conduct benchmark and annual economic and social impact to measure progress, leveraging some of the KPIs identified in the Implementation Considerations section.
- Conduct economic forecasting to understand where economic growth is likely to occur. Use these data to guide the selection of sectors noted above.

2. Explore Adjacent Sectors

- Sectors and industries that are related to existing strengths in the city can be leveraged to identify new opportunities in areas such as green and circular economy convergence and high-tech.

3. Align the Talent Pipeline

- Partner with higher education institutions such as NAU and CCC to align programming, ensuring the appropriate talent pipeline is available for companies.

2

PILLAR TWO: BRANDING AND AWARENESS

Community members, entrepreneurs, and private companies may be unaware of the supports Flagstaff provides to boost businesses. Developing stronger branding and messaging will help businesses to find and use the resources they need. A stronger brand will also shape perceptions about Flagstaff and support business attraction efforts.

Recommendations

1. Brand the City of Flagstaff

- Develop a collective brand and narrative for Flagstaff that unites the community, its partners, residents, and businesses.
- Bring together Community Visioning Session participants for a discussion focused solely on the potential brand and narrative for Flagstaff.
- Embed the narrative into City of Flagstaff materials for internal and external audiences.

2. Communicate the City of Flagstaff Value Proposition

- Promote the City of Flagstaff Value Proposition to internal (within Flagstaff) and external (outside the city) audiences. Include the following core key differentiators:
 1. Natural beauty and outdoor recreation opportunities.
 2. Proximity to large markets (notably, Phoenix, Las Vegas, California).

3. Economic opportunities (ranked among the best-performing small U.S. cities for economic resilience and opportunity by the Milken Institute (2022)).⁶⁶

- Develop a “Doing Business in Flagstaff” guide to support new and existing businesses with helpful information and a directory of the community’s business support resources.

3. Enhance Workforce Partnerships

- Support workforce development partners in increasing awareness of resources through creative advertising and strategic communication partnerships. Consider hosting a “career week” that brings service providers together with jobseekers in digital and in-person settings.
- Focus on targeting upcoming and recent graduates, youth, and young professionals as a retention tactic.

- Promote business opportunities to tribal communities to increase business traffic to Flagstaff as an extension of these communities.

4. Increase Awareness of Sector Strengths and Resources

- Enhance awareness and usability of existing assets in priority sectors.
- Develop product sheets for each of the identified priority sectors. Build materials that focus on the core value proposition of Flagstaff and existing strength in these sectors.
- Promote community wins and historical achievements through creative marketing. For example, consider creating sidewalk art with the top 10 “Did You Know?” economic facts for Flagstaff, and / or hosting business showcase events.

5. Raise Community Awareness of City Policies, Procedures, and Supports

- Finalize the “Business One Stop Shop” (BOSS) navigation platform to enhance communication and predictability for businesses engaging with the City of Flagstaff. Support platform integration with the Community Development website to increase coherence for users and system management.
- Promote services and offerings on the City of Flagstaff website.

- Develop a clear roadmap and checklists for the business expansion and approval process to streamline the process and communicate clear expectations to businesses.
- Conduct annual business surveys to identify needs and align annual economic development workplans to address them.
- Support Planning and Development in advancing the site suitability and code categorization project with the goal of a more transparent and coordinated process that is intuitive for business owners to understand and follow.
- Identify opportunities to address issues for increased business efficiency, ease of use, and continuous improvement.
- Undertake communication activities to increase awareness amongst the business community of relevant processes and resources.
- Continue to ensure criteria and objectives of business incentivization and other economic development programming are aligned with priority sectors and relevant City policies.

3

PILLAR THREE: SUSTAINABLE ECONOMIC DEVELOPMENT

Flagstaff is a standout for its natural wonders and outdoor recreation. To protect this value proposition while also promoting economic growth, the City will want to establish criteria that balance these values.

This pillar will also be supported by recommendations in the Focus and Positioning pillar related to green and circular economy convergence and high-tech industries.

Recommendations

- 1. Define What Sustainable Economic Development Means to Flagstaff**
 - One example could be, “Balancing current and future needs in the use and preservation of natural resources, investment, technology, and people.”
- 2. Establish Sustainable Economic Development Metrics That Support Municipal Climate Action Targets**
 - Adopt baseline, short-term, and long-term targets for sustainable economic development to make it easier for businesses to align with the expectations and opportunities of the city.
- 3. Attract and Expand Businesses That Align With City Criteria for Sustainable Development**
 - Build a campaign to increase Flagstaff BR&E.
 - Identify a target list of 10 to 20 high-tech companies with low environmental impact and high wages for potential expansion to Flagstaff. Begin with companies in the California and Phoenix markets.
 - Target companies in California that could establish satellite offices in Flagstaff. Identify the top two- to six-level North American Industry Classification Codes (NAICS) as a target list to assist with investment and company attraction efforts in the priority sectors.
 - Target companies in the Phoenix area for potential expansion to Flagstaff. Identify the top two- to six-level North American Industry Classification Codes (NAICS) as a target list to assist with investment and company attraction efforts in the priority sectors.

- Conduct a scan of other potential target geographical locations and sectors based on the proposed priority sectors.
- Research the profile of companies and individuals seeking outdoor recreation environments to live and work. Develop a target list of companies by NAICS codes and individuals that may be interested in expansion and / or relocation to Flagstaff.
- Establish business attraction criteria (e.g., energy and water efficiency, low environmental impact, high wages, and real estate requirements) to identify businesses that complement strengths, capacities, and priorities of Flagstaff.
- Explore opportunities to attract motion picture and video production and creative industries to Flagstaff.

4. Identify Opportunities for Infrastructure Expansion

- Promote land parcels identified in the Land Availability and Suitability Study / Code Analysis Project⁶⁷ with five, 10, 20, 30, 40, and 50 acres of land for potential development.

5. Enhance Business Supports That Promote Sustainable Economic Development

- Develop and launch a 12-week outdoor recreation accelerator program with community partners. Recruit companies that create recreation services and products from within Flagstaff and throughout the state and the U.S.
- Develop and launch a 12-week creative industries (e.g., film, music) accelerator program with community partners. Recruit companies from within Flagstaff and throughout the state and the U.S.
- Collaborate with partners to integrate new talent into the regional workforce. Consider hosting networking and talent matchmaking events as well as offering spousal employment and integration support services.

4

PILLAR FOUR: COMMUNITY ECOSYSTEM DEVELOPMENT

Flagstaff has identified several important areas of focus to strengthen infrastructure and networks in the community. This pillar recognizes and supports these efforts, particularly in the area of building and maintaining strong relationships. These relationships will allow Flagstaff to act as a convener for economic development activities, connecting people and organizations with the resources they need to succeed. This approach will also strengthen the overall ability of Flagstaff to address challenges related to planning, infrastructure, and related policies, resulting in a more coordinated, coherent, and connected community.

Recommendations

1. Pursue Funding to Address Infrastructure Challenges

- Identify potential funding programs that may be available at state and federal levels to support private sector development incentives that can increase affordable housing options in the city.
- Identify and pursue funding to enhance broadband connectivity throughout Flagstaff and in areas of need.
- Pursue the development of a community-based performing arts center to continue to build on the arts and culture and creative industry potential for the city, the surrounding county, and throughout Northern Arizona.

2. Strengthen Community Partnerships

- Create greater connections between Flagstaff, NAU, and CCC. Identify high-profile collaborative projects that can be pursued to support long-term regional growth and prosperity and overall workforce development capacity building.

3. Formalize Relationships With Business Support Organizations

- Establish an ongoing Business Support Steering Committee to develop and share corporate knowledge of each organization. Aim for eight to 12 members from target local organizations (e.g., Moonshot, Chamber

of Commerce, NAU, ECONA, SBDC, City of Flagstaff Economic Development, Creative Flagstaff, Coconino Workforce Development Board, Downtown Flagstaff, and Coconino County Economic Development).

- Develop a charter for the Business Support Steering Committee to establish individual and shared targets, approaches, and measurements.

- Explore opportunities to convene other economic organizations / groups through similar steering committee models for related topics such as workforce development, poverty reduction, and access to health care and child care.



THE SECTORS

BUILDING ON SECTOR STRENGTHS

The City of Flagstaff recognizes the need to focus and advance its economy with evidence-backed priority sectors. Positioning, messaging, and educational and program development for these sectors can help drive business attraction and retention in the city, county, and beyond.

Focusing on a select group of sectors for development allows communities to concentrate their resources and maximize results. This approach also helps communities build a strong identity among external investors who begin to see the city as a place of opportunity in specific fields.

Five Priority Sectors

Recognizing the city's strongest assets and opportunities, and considering emerging economic trends, five sectors have been selected: astronomy, food processing, forestry products, biomedical / health care, and advanced manufacturing.

Figure 6 provides an overview of how strategy inputs will leverage strengths, priority sectors, and community assets to generate lasting economic impact.

Foundational Sector: Tourism

For Flagstaff, tourism has been identified as a foundational sector that supports the development of other sectors. For the purpose of this strategy, a summary of the tourism strengths is included in this section. The City's Discover Flagstaff team oversees a robust set of data-driven strategies and actions, as noted in its most recent annual report.⁶⁸



Figure 6: Sector strengths snapshot, Flagstaff Economic Development Strategy 2024-29⁶⁹

	EDUCATION	WORKFORCE ⁷⁰	LOCAL ASSETS
Astronomy	<ul style="list-style-type: none"> Seven programs at NAU supporting training and development in astronomy, including specializations in astrobiology, astrochemistry and planetary science⁷¹ 116 student completions in physical sciences at NAU (2022-23)⁷² Students who study at NAU have access to the Lowell Observatory to utilize as a research tool⁷³ 	<ul style="list-style-type: none"> 178 jobs in astronomy related NAICS codes in 2022, representing a 14.2% increase from 156 jobs in 2017. High employment concentration in Radio broadcasting station (2.0) 	<ul style="list-style-type: none"> Lowell Observatory⁷⁴ U.S. Naval Observatory Flagstaff Station (NOFS)⁷⁵ Clear, dark skies⁷⁶
Food Processing	<ul style="list-style-type: none"> 14 programs at NAU supporting training and development in food processing, including various foundational science fields such as biology and chemistry, as well nutrition, and brewing and fermentation programs⁷⁷ 	<ul style="list-style-type: none"> 371 jobs in food processing related NAICS codes in 2022, representing a 3.3% increase from 359 in 2017. High employment concentrations in Dog and cat food manufacturing (30.1) and Seafood product preparation and packaging (4.0) 	<ul style="list-style-type: none"> Major companies such as Nestlé Purina PetCare⁷⁸ and Joy Cone Co.⁷⁹ Northern Arizona Manufacturing Partnership⁸⁰ Flagstaff is home to eight craft breweries (2023)⁸¹
Forestry Products	<ul style="list-style-type: none"> 49 programs at NAU supporting training and development in forestry products, including specializations in forestry science, forest health, and management⁸² Six programs at CCC relevant to forestry products, including certificates in fire science wildfire suppression, and sustainable green building⁸³ 254 student completions in 2021-22 in the natural resources and conservation program at NAU⁸⁴ 	<ul style="list-style-type: none"> 136 jobs in forestry products related NAICS codes in 2022, representing a 15.1% decrease from 156 in 2017. High employment concentrations in Environment, conservation and wildlife organizations (2.8), Environmental consulting services (2.3), and Support activities for forestry (1.5) 	<ul style="list-style-type: none"> Ecological Restoration Institute at NAU⁸⁵ Center for Adaptable Western Landscapes at NAU⁸⁶

Figure 6: Sector strengths snapshot, Flagstaff Economic Development Strategy 2024-29 (cont'd)

	EDUCATION	WORKFORCE ⁷⁰	LOCAL ASSETS
Biomedical / Health Care	<ul style="list-style-type: none"> 35 programs offered at NAU with focus and specializations in areas such as athletic training, autism spectrum disorders, biomedical science, and nursing⁸⁷ 11 certificates and workforce degrees offered at CCC, including early childhood education, medical office management, nursing, and paramedicine⁸⁸ At NAU, health professions and related programs had a significant completion rate, with 1,287 students finishing the program in 2021-22 (15.9% of total completions)⁸⁹ At CCC, health professions and related programs had 183 completions, accounting for 26.1% of the overall completions⁹⁰ 	<ul style="list-style-type: none"> 8,094 jobs in health care related NAICS codes in 2022, representing an 8.5% decrease from 8,848 in 2022. High employment concentrations in Surgical and medical instrument manufacturing (4.5), General medical and surgical hospitals (2.4), and Offices of mental health practitioners (except physicians) (2.1) 	<ul style="list-style-type: none"> The Pathogen and Microbiome Institute at NAU⁹¹ Center for Health Equity Research at NAU⁹² Northern Arizona Healthcare (NAH) has plans to build a new hospital and to develop a “health and wellness village” in Flagstaff⁹³
Advanced Manufacturing	<ul style="list-style-type: none"> 15 programs in advanced manufacturing are offered at NAU, ranging from mechanical engineering to manufacturing technology⁹⁴ Four programs at CCC relevant to advanced manufacturing including construction technology and automotive technology⁹⁵ NAU is home to the Engineering Fabrication Lab (machine shop) used as an instruction and research facility⁹⁶ 	<ul style="list-style-type: none"> 3,078 jobs in manufacturing related NAICS codes in 2022, representing an 11.7% decrease from 3,485 in 2022. High employment concentrations in Surgical appliance and supplies manufacturing (45.9), Dog and cat food manufacturing (30.1) and Breweries (6.6) 	<ul style="list-style-type: none"> Center for Materials Interfaces in Research Applications at NAU⁹⁷ The Northern Arizona Manufacturing Partnership (NAMP), an initiative led by the Greater Flagstaff Chamber of Commerce, focuses on policy advocacy for the manufacturing industry to strengthen the local economy and workforce⁹⁸ Planning and development of a 32-acre manufacturing and research hub near Flagstaff Pulliam Airport is underway⁹⁹

Source: Stiletto Analysis

PRIORITY SECTORS IN THE FUTURE

Depending on the focus on sustainability or next-generation information and communications (ICT) innovations, various industries can be further

developed. Figure 7 provides an overview of how sectors can leverage emerging trends to enhance their growth.

Figure 7: Past, present, and future sectors continuum analysis, City of Flagstaff, 2024¹⁰⁰

PAST	PRESENT	FUTURE (+GREEN ECONOMY / CIRCULAR ECONOMY)	NEXT GENERATION (+ICT)
Astronomy	Astronomy	<ul style="list-style-type: none"> • Dark skies • “Astronomers for Planet Earth” – center of education for climate change 	<ul style="list-style-type: none"> • Space • Optics / lasers / fiber • Imaging and sensing • Artificial intelligence and robotics
Agriculture / animal husbandry	Food processing	<ul style="list-style-type: none"> • Craft brewing • Local food 	<ul style="list-style-type: none"> • Beer 4.0 • Ecommerce
Logging / timber / forestry	Forestry products	<ul style="list-style-type: none"> • Forestry restoration and management 	<ul style="list-style-type: none"> • Precision forestry management • Big data / predicting modeling / management software • Drones and remote sensing • Biomass
Health care	Biomedical / health care	<ul style="list-style-type: none"> • Life sciences and biosciences 	<ul style="list-style-type: none"> • Medical 3D printing and bioprinting • Artificial intelligence and robotics • AR and VR • Wearables • Connected devices (internet of things) / “internet of medical things”
Manufacturing	Advanced manufacturing	<ul style="list-style-type: none"> • Sustainable practices in manufacturing 	<ul style="list-style-type: none"> • Additive / advanced manufacturing • Industrial Internet of Things

Source: Stiletto Analysis

SECTOR SNAPSHOTS

Astronomy

With its unique environmental assets and a growing workforce and business community in information technology, Flagstaff has an opportunity to establish itself as a leader in the astronomy sector. This sector was strategically chosen based on its overall alignment with tourism strengths and sustainability-related goals. Astronomy offers growth opportunities with low environmental impact and high-wage job creation potential. Figure 8 provides an overview of sector assets.



Figure 8: Astronomy sector data highlights, City of Flagstaff, various dates¹⁰¹



A history of cutting edge RESEARCH

at the Lowell Observatory in Flagstaff which was named one of the “World’s 100 Most Important Places”

Industry-leading astronomy organizations

such as Lowell Observatory and the US Naval Observatory

14.2%
GROWTH

in astronomy-related occupations in Flagstaff from 2017-22

7 PROGRAMS

supporting training and development in astronomy at Northern Arizona University, including specializations in astrology, astrochemistry, astronomy, and planetary science



\$27.3 MILLION

in physical sciences research expenditures from 2017-21 at Northern Arizona University

99 JOB POSTINGS

in Flagstaff in astronomy and related industries between December 2022 and December 2023

Source: Stiletto Analysis

Sector strengths to build on

- **Clear, dark skies:** Flagstaff was recognized in 2001 by the International Dark-Sky Association (IDA) as the world's first International Dark Sky City, making it an ideal location for stargazing and astronomical research.^{102, 103}
- **Industry-leading organizations:** The Lowell Observatory (named one of the World's Most Important Places) and the U.S. Naval Observatory provide leading-edge facilities.
- **Institutions:** NAU and CCC contribute to a well-educated workforce and ongoing research that is particularly beneficial for cutting-edge fields like bioscience and astronomy.
- **Collaborations:** Academia-industry partnerships foster innovation and attract talent that is essential for bioscience, astronomy, environmental technologies, and advanced manufacturing.

Proposed emerging industries

Within astronomy, several newer industries can be explored to expand economic growth within Flagstaff.

These industries have been selected for their future

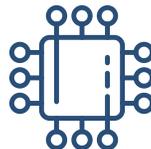
market potential, emerging trends, and alignment with needs and priorities:



Dark skies /
astrotourism



Space



Optics / lasers /
fiber



Imaging and
sensing



Artificial
intelligence and
robotics

Food Processing

Flagstaff is home to major food processing businesses in Dog and cat food manufacturing and Cookie and cracker manufacturing. These businesses support hundreds of jobs and provide a solid foundation for further development. Benefiting from the strategic location between major urban markets and from the high-quality transportation and logistics infrastructure in the city, this sector is poised for further development. Growth in this area could support enhanced affordability and food security solutions, contributing to overall economic resilience.

Figure 9 provides an overview of sector assets.



Figure 9: Food processing sector data highlights, City of Flagstaff, various dates¹⁰⁴



23.8%
**IN RESEARCH
EXPENDITURES**

from the U.S. Department of Agriculture totaling \$18.7 million from 2017-21 at Northern Arizona University

14 PROGRAMS

supporting training and development in food processing at Northern Arizona University, including specializations in brewing and fermentation, nutrition, biology, and chemistry

32 JOB POSTINGS

in Flagstaff in food processing and related industries between December 2022 and December 2023

**\$256.8
MILLION**

in total sales in food processing industries in Flagstaff (2022)

**\$96.9
MILLION**

in GRP in food processing industries in Flagstaff (2022)

**371
WORKFORCE**

in food processing industries in Flagstaff in 2022 in businesses such as Nestlé Purina PetCare and Joy Cone

Source: Stiletto Analysis

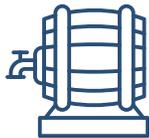
Sector strengths to build on

- **Projected job growth:** Food-related occupations are expected to grow by 13.0 percent in Flagstaff by 2027.¹⁰⁵
- **Workforce growth:** The snack and beverage industry experienced the largest workforce growth in Flagstaff from 2017-22, at +355.7 percent.¹⁰⁶
- **Valuable research infrastructure and funding:** Almost a quarter of NAU research expenditures were from the U.S. Department of Agriculture 2017-21.¹⁰⁷

Proposed emerging industries

Within food processing, several emerging industries can be explored to expand future economic growth within Flagstaff. These emerging industries have been

selected for their market potential, emerging trends, and alignment with needs and priorities:



Craft brewing



Local /
sustainable food



Beer 4.0



ECommerce

Forestry Products

The forestry products sector accounts for 40.0 percent of research organizations in Flagstaff, indicating potential untapped commercialization and employment opportunities for Flagstaff in this sector. With future opportunities in forest health and restoration, building on this sector also aligns with overall sustainability goals and contributes to community health and environmental resilience. Figure 10 provides an overview of sector assets.



Figure 10: Forestry products sector data highlights, City of Flagstaff, various dates¹⁰⁸

4 RESEARCH CENTERS



at Northern Arizona University supporting forestry products research and innovation, including the Center for Ecosystem Science and Society, Ecological Restoration Institute, and Center for Adaptable Western Landscapes

55 PROGRAMS

supporting training and development in forestry products at Northern Arizona University and Coconino Community College, including specializations in forestry science, forest health, and management

109 JOB POSTINGS

in Flagstaff in forestry products and related industries between December 2022 and December 2023

\$15.8 MILLION

in total sales in forestry products industries in Flagstaff (2022)

\$36.3 MILLION

in geosciences, atmospheric sciences, and ocean sciences research expenditures from 2017-21 at Northern Arizona University

136 WORKFORCE

in forestry product industries in Flagstaff in 2022 in businesses such as U.S. Forest Service and Markit! Forestry Management

Source: Stiletto Analysis

Sector strengths to build on

- **Strong education pipeline:** Programs at NAU and CCC support a range of related careers in forestry products. Graduates from these programs can contribute to growth in the sector's workforce.
- **Research funding:** NAU recorded \$36.3 million in research expenditures in 2017-21.¹⁰⁹
- **Innovation and commercialization opportunities:** With research centers in a range of related fields, Flagstaff is well-positioned to drive advancements.

Proposed emerging industries

Within forestry products, several emerging industries can be explored to expand economic growth within Flagstaff. These emerging industries have been

selected for their market potential, emerging trends, and alignment with needs and priorities:



Forestry restoration and management
(falls under ecological land restoration)



Precision forestry management



Big data / predicting modeling / management software



Drones and remote sensing



Biomass (wood pellets)

Biomedical / Health Care

Biomedical / health care is one of the strongest sectors for Flagstaff and demonstrates considerable potential for growth and diversification. This sector was strategically chosen for its potential to address regional infrastructure needs, create high-wage job opportunities, and contribute to overall community and economic resilience objectives. Figure 11 provides an overview of sector assets.



Figure 11: Biomedical / health care sector data highlights, various dates¹¹⁰

4 RESEARCH CENTERS



at Northern Arizona University focused on health research and innovation, including the Center for Health Equity Research and the Pathogen and Microbiome Institute

46 PROGRAMS

supporting training and development in health and life sciences at Northern Arizona University and Coconino Community College, including specializations in public health, medical and health sciences, nursing, and paramedicine

2,229 JOB POSTINGS

in Flagstaff in health and life sciences industries between December 2022 and December 2023

THE 2ND LARGEST INDUSTRY CLUSTER

in Flagstaff is medical devices, which employs over 1,500 people

\$180.4 MILLION

in life sciences research expenditures between 2017-21 at Northern Arizona University

8,094 WORKFORCE

in health and life sciences industries in Flagstaff in 2022 in businesses such as the Flagstaff Medical Center and Northern Arizona Home Healthcare

Source: Stiletto Analysis

Sector strengths to build on

- **Strong talent pipeline:** Health professions and related programs at NAU had a significant completion rate, with 1,287 students finishing the program in 2012-22 (15.9% of the total).¹¹¹
- **Well-aligned program offerings:** CCC offers programs in several health fields, including nursing assistant / aide, patient care assistant / aide, and registered nursing / registered nurse.¹¹²
- **Demonstrated research investment:** Life sciences accounted for 61.9 percent of NAU research expenditures (2017-21).¹¹³
- **A growing network of expertise:** Centers conducting health-related research include the Center for Health Equity Research (CHER), which is working to end health disparities regionally, nationally, and internationally, and the Pathogen and Microbiome Institute, which focuses on understanding pathogens that affect humans and wildlife.^{114, 115}

Proposed emerging industries

Within biomedical / health care, several emerging industries can be explored to expand economic growth within Flagstaff. These emerging industries

have been selected for their market potential, emerging trends, and alignment with needs and priorities:



Life sciences and biosciences



Medical 3D printing and bioprinting



Artificial intelligence and robotics



AR and VR



Wearables



Connected devices (Internet of Things) / Internet of Medical Things

Advanced Manufacturing

The advanced manufacturing sector is well established in Flagstaff, with strong concentrations of workers in Surgical and appliance supplies manufacturing, Food and medical manufacturing, and Surgical and medical instrument manufacturing. The sector benefits from the strategic location between major urban markets, quality transportation, and logistics infrastructure, as well as a skilled workforce – all of which can support sector growth and diversification in the city. Figure 12 provides an overview of sector assets.



Figure 12: Manufacturing sector data highlights, various dates¹⁶

**FLAGSTAFF IS
14X MORE
SPECIALIZED**



in biomedical manufacturing than any other city in the United States

19 PROGRAMS

supporting training and development in manufacturing at Northern Arizona University and Coconino Community College, including specializations in mechanical engineering, mechatronics and robotics engineering, and construction technology

618 JOB POSTINGS

in Flagstaff in manufacturing and related industries between December 2022 and December 2023

**THE 5TH LARGEST
INDUSTRY CLUSTER**

in Flagstaff is manufacturing, which employs over 600 people

**\$33.8
MILLION**

in engineering and computer and information science research expenditures between 2017-21 at Northern Arizona University

**3,078
WORKFORCE**

in manufacturing industries in Flagstaff in 2022 in businesses such as Nestlé Purina PetCare, W.L. Gore and Associates, and Novakinetics AeroSystems

Source: Stiletto Analysis

Sector strengths to build on

- **Flagstaff is home to major manufacturers:** Main employers in advanced manufacturing in Flagstaff include Nestlé Purina Petcare, W. L. Gore and Associates, and Novakinetics Aerosystems.¹¹⁷
- **Forthcoming innovation hub:** The planning and development of a 32-acre manufacturing and research hub near Flagstaff Pulliam Airport is underway in Flagstaff, reflecting the city's commitment to the advanced manufacturing sector.¹¹⁸
- **Highly specialized expertise and infrastructure:** Flagstaff is 14 times more specialized in biomedical manufacturing than any other city in the U.S.
- **Educational alignment:** 19 programs support training and development in advanced manufacturing at NAU and CCC, including specializations in mechanical engineering, mechatronics and robotics engineering, and construction technology.^{119,120}
- **Industry collaboration and advocacy:** The Northern Arizona Manufacturing Partnership (NAMP), an initiative led by the Greater Flagstaff Chamber of Commerce, focuses on policy advocacy for the advanced manufacturing industry to strengthen the local economy and workforce. NAMP actively encourages youth engagement to build a skilled labor pool for advanced manufacturing.¹²¹

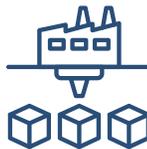
Proposed emerging industries

Within advanced manufacturing, several emerging industries can be explored to expand economic growth within Flagstaff. These emerging industries have been

selected for their market potential, emerging trends, and alignment with needs and priorities:



Sustainable manufacturing
(green technology and sustainability)



Additive manufacturing



Industrial Internet of Things

Tourism

Although not a priority sector in the economic development strategy, tourism acts as a foundational sector that provides broad support for the economic development strategy. In Flagstaff, tourism is a core activity that allows the city to punch above its weight in general awareness and brand equity. With incomparable natural attractions and strong business and workforce assets, Flagstaff can continue to leverage its tourism strengths to support other sectors.

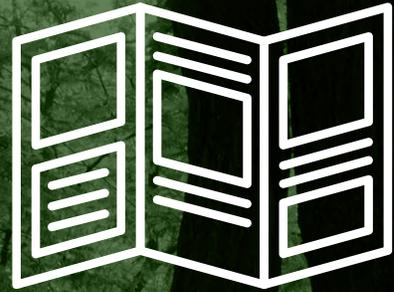


Figure 13: Tourism sector data highlights, City of Flagstaff, various dates¹²²

NUMEROUS ORGANIZATIONS

in Flagstaff supporting tourism, and attraction to the region, including Discover Flagstaff, the Greater Flagstaff Chamber of Commerce, and the Flagstaff Downtown Business Alliance



18 PROGRAMS

supporting training and development in tourism at Northern Arizona University and Coconino Community College, including specializations in hospitality management, hotel and restaurant services, and tourism and leisure planning

1,232 JOB POSTINGS

in Flagstaff in tourism and related industries between December 2022 and December 2023

9.3 MILLION VISITS

to hotels and restaurants in Flagstaff in 2022

\$930.2 MILLION

in GRP earnings in 2022 from retail trade, arts, entertainment and recreation, and accommodation and food services in Flagstaff

11,227 WORKFORCE

in tourism-related industries (arts, entertainment and recreation, and accommodation and food services) in Flagstaff in 2022

Source: Stiletto Analysis

Sector strengths to build on

- **Share of employment:** the share of employment in Nature parks and similar institutions was over 25 times the national share, and employment in Tour operators was 17.60 times the national share. Employment in Musical groups and artists was 6.71 times the national share, while employment in Breweries and Museums were both over 6.50 times the national average in 2022. These strengths will ensure that Flagstaff continues to attract and impress visitors, many of whom may become residents
- **Visit. Discover. Grow campaign:** Many of the city's entrepreneurs and business leaders first encountered Flagstaff as visitors and were so impressed by the natural beauty and culture of the city that they decided to move their operations here. The city has leveraged this tourism-to-business-attraction pathway in its Visit. Discover. Grow. campaign.

Proposed Emerging Industries

Tourism is included as a foundational sector in this overall economic development plan due to the performance of the tourism sector in the City of Flagstaff. Discover Flagstaff has already developed

a comprehensive approach to tourism,¹²³ but we note several emerging areas within the sector that could spur opportunities in a creative industries positioning:



Eco-tourism



Restaurants and accommodations



Retail



Outdoor recreation



Music and film

IMPLEMENTATION CONSIDERATIONS

KEYS TO SUCCESS

In building community economic strategies, it is important to go beyond assessing opportunities with workforce development, business support services, and the potential for business attraction and retention. Flagstaff must also consider “the how,” and what enablers are needed to support the overall economic development strategy. In doing so, the city ensures it has the right guiding strategy and access to the

necessary implementation tools to support long-term, sustainable impact and results. As Figure 14 illustrates, these components include infrastructure elements, such as transportation, housing, and broadband, which support industry and workforce attraction and retention, and mobilization components that relate to the leadership team’s work in implementing the strategy and tracking progress over time.

Figure 14: Keys to successful implementation of economic development strategies¹²⁴

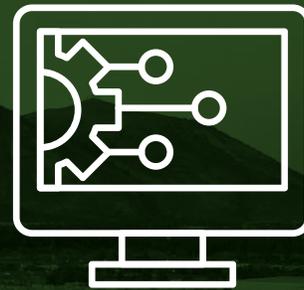


INFRASTRUCTURE

TRANSPORTATION

HOUSING

BROADBAND



MOBILIZATION

DATA COLLECTION AND
METRICS SYSTEMS

ACTION PLAN

Source: Stiletto Analysis

Measuring Impact

Tracking progress and evaluating success is essential to building and maintaining strategy momentum.

The use of key performance indicators (KPIs) can help quantify the impact of strategic actions. KPIs can

also be used to identify and respond to areas where additional adjustments are needed. Figure 15 provides example KPIs for each recommendation.

Figure 15: Pillars, recommendations, and example KPIs, Flagstaff Economic Development Strategy 2024-29¹²⁵

RECOMMENDATION	EXAMPLE KPIs
Pillar One: Focus and Positioning	
1. Identify and Mobilize Priority Sectors	<ul style="list-style-type: none"> • Number of businesses attracted in priority sectors • Number of businesses expanded in priority sectors • Dollars of investment in priority sectors • GDP generated by priority sectors • Employment in priority sectors • Sales tax revenue
2. Explore Adjacent Sectors	<ul style="list-style-type: none"> • Adjacent sectors selected • Number of businesses attracted in adjacent sectors • Number of businesses expanded in adjacent sectors • Dollars of investment in adjacent sectors • GDP generated by adjacent sectors • Employment in adjacent sectors
3. Align the Talent Pipeline	<ul style="list-style-type: none"> • Collaboration with educational institutions established to discuss / review alignment
Pillar Two: Branding and Awareness	
1. Brand the City of Flagstaff	<ul style="list-style-type: none"> • Brand developed and communicated • Brand recognition in community (mentions of brand language on social media, in media coverage, and other communication channels)
2. Communicate the City of Flagstaff Value Proposition	<ul style="list-style-type: none"> • Value proposition articulated and shared • Qualitative feedback on proposition from businesses and community
3. Enhance Workforce Partnerships	<ul style="list-style-type: none"> • Number of partnerships developed • Number of shared initiatives / collaborative projects
4. Increase Awareness of Sector Strengths and Resources	<ul style="list-style-type: none"> • Product sheets developed for priority sectors • Events hosted to showcase downtown businesses • Traffic to Economic Development website and uptake of resources there • Attendance at events
5. Raise Community Awareness of City Policies, Procedures, and Supports	<ul style="list-style-type: none"> • Launch of full BOSS navigation platform • Services and offerings promoted on City website • Roadmap and checklists posted on website • Annual business survey conducted (number of responses) • Communications for site suitability and code categorization created

Figure 15: Pillars, recommendations, and example KPIs, Flagstaff Economic Development Strategy 2024-29 (cont'd)

RECOMMENDATION	EXAMPLE KPIs
Pillar Three: Sustainable Economic Development	
1. Define What Sustainable Economic Development Means to Flagstaff	<ul style="list-style-type: none"> • Definition developed and communicated
2. Establish Metrics for Sustainable Economic Development to Support Municipal Climate Action Targets	<ul style="list-style-type: none"> • Benchmarks for sustainable economic development targets launched
3. Attract and Expand Businesses That Align With City Criteria for Sustainable Development	<ul style="list-style-type: none"> • Launch of campaign to increase BR&E • Number of companies targeted in California for expansion to Flagstaff • Number of companies in the Phoenix area targeted for potential expansion to Flagstaff • Identification of other target geographical locations and sectors • Target list of outdoor recreation companies developed • Business attraction criteria developed
4. Identify Opportunities for Infrastructure Expansion	<ul style="list-style-type: none"> • Number of opportunities identified • Amount of funding obtained for projects
5. Enhance Business Supports That Promote Sustainable Economic Development	<ul style="list-style-type: none"> • Qualitative / quantitative feedback from community about business supports • Increase in usage of business supports
Pillar Four: Community Ecosystem Development	
1. Pursue Funding to Address Infrastructure Challenges	<ul style="list-style-type: none"> • Number of opportunities identified • Number of proposals submitted • Number of opportunities secured • Amount of funding secured
2. Strengthen Community Partnerships	<ul style="list-style-type: none"> • Number of initiatives to strengthen partnerships • Qualitative feedback from community partners
3. Formalize Relationships With Business Support Organizations	<ul style="list-style-type: none"> • Working group or relationship established

Source: Stiletto Analysis

Ensuring Risk Is Assessed and Mitigated

As Flagstaff begins to implement the Economic Development Strategy, it will want to assess and plan for several important risks identified in the research and through engagement with relevant groups (Figure 16).

Figure 16: Risks and mitigations, Flagstaff Economic Development Strategy 2024-29¹²⁶

RISK	MITIGATION
Lack of awareness / uptake of economic development resources leads to lack of engagement of businesses in attraction / expansion activities	Broad communication of services and how they can be used
Perception of the town as a “resort-only” city leads to underdevelopment of other sectors	Identify priority sectors and continue to focus resources and attention on these areas
Decline in higher education completions leads to shrinking talent pipeline	Partner with NAU, CCC, and industry partners to align programs with workforce needs
High cost of living leads to outmigration	Develop policies and incentives that support affordable housing and the creation of high quality jobs
Comparatively lower economic development staff resources leads to difficulties implementing recommendations in this plan	Identify budget and / or funding to hire project-based economic development staff (one to two FTE positions)
Lack of accessibility to child care leads to outmigration	Develop policies and incentives that support access to child care, and support employers in anticipating child care needs of employees and identifying resources

Source: Stiletto Analysis

IMPLEMENTATION ROADMAP

Figure 17 provides an overview of the recommendations and target timelines for the

Economic Vitality Division to implement and measure impacts over the next two decades.

Figure 17: Pillars, recommendations, and timelines for measuring impacts, Flagstaff Economic Development Strategy 2024-29¹²⁷

PILLAR	RECOMMENDATION	TODAY	YEAR 1	YEAR 2	YEAR 5	YEAR 10	YEAR 20
Pillar One: Focus and Positioning	1. Identify and Mobilize Priority Sectors		✓	✓	✓	✓	✓
	2. Explore Adjacent Sectors			✓	✓	✓	✓
	3. Align the Talent Pipeline		✓	✓	✓	✓	✓
Pillar Two: Branding and Awareness	1. Brand the City of Flagstaff		✓	✓	✓	✓	✓
	2. Communicate the City of Flagstaff Value Proposition		✓	✓	✓	✓	✓
	3. Enhance Workforce Partnerships	✓	✓	✓	✓	✓	✓
	4. Increase Awareness of Sector Strengths and Resources	✓			✓	✓	✓
	5. Raise Community Awareness of City Policies, Procedures, and Supports	✓			✓	✓	✓
Pillar Three: Sustainable Economic Development	1. Define What Sustainable Economic Development Means to Flagstaff		✓	✓			
	2. Establish Metrics for Sustainable Economic Development That Support Municipal Climate Action Targets		✓	✓	✓		
	3. Attract and Expand Businesses That Align With City Criteria for Sustainable Development		✓	✓	✓	✓	✓
	4. Identify Opportunities for Infrastructure Expansion	✓	✓	✓	✓	✓	✓
	5. Enhance Business Supports That Promote Sustainable Economic Development	✓	✓	✓	✓	✓	✓
Pillar Four: Community Ecosystem Development	1. Pursue Funding to Address Infrastructure Challenges	✓	✓	✓	✓	✓	✓
	2. Strengthen Community Partnerships	✓	✓	✓	✓	✓	✓
	3. Formalize Relationships With Business Support Organizations		✓	✓			

Source: Stiletto Analysis

ENDNOTES

All endnotes have been verified as of the date of this report.

- ¹ Stiletto Analysis, 2024
- ² Stiletto Analysis, 2024
- ³ “Coconino County, Coconino Medium Series (Population Projections),” Arizona Office of Economic Opportunity, 2022, <https://oeo.az.gov/sites/default/files/data/pop/coconino-medium-series.xlsx>
- ⁴ “Coconino County, Coconino Medium Series (Population Projections),” Arizona Office of Economic Opportunity, 2022, <https://oeo.az.gov/sites/default/files/data/pop/coconino-medium-series.xlsx>
- ⁵ “Population Demographics Report, 6 Arizona ZIPs, 2017-22; Lightcast Q1 2024 Data Set,” Lightcast, 2024
- ⁶ “Flagstaff, AZ: Q4 2023 Data Set,” Lightcast, 2023
- ⁷ “Industry Table, 6 Arizona ZIPs, 2017-22; Lightcast Q1 2024 Data Set,” Lightcast, 2024
- ⁸ “Industry Table, 6 Arizona ZIPs, 2017-22; Lightcast Q1 2024 Data Set,” Lightcast, 2024
- ⁹ “Counties Where the Most People Work From Home in Arizona,” Stacker, March 20, 2023, <https://stacker.com/arizona/2021%20-where-most-people-work-home-arizona-1>
- ¹⁰ “Quick Facts: Flagstaff City, Arizona,” United States Census Bureau, 2023, <https://www.census.gov/quickfacts/fact/table/flagstaffcityarizona/PST045222>
- ¹¹ “Economy at a Glance – Flagstaff, AZ,” U.S. Bureau of Labor Statistics, November 2023, https://www.bls.gov/eag/eag.az_flagstaff_msa.htm
- ¹² “Occupation Table, 6 Arizona ZIPs; Lightcast Q1 2024 Data Set,” Lightcast, 2024
- ¹³ “Facts and Statistics,” Northern Arizona University, 2023, <https://nau.edu/about/facts-and-statistics/>
- ¹⁴ “Institutional Research,” Coconino Community College, 2023, <https://www.coconino.edu/institutional-research#employee-headcounts>
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