



# **BOARD OF DIRECTORS PUBLIC SESSION, FY15-Q4 & YTD**

June 22, 2015

# ACA Q4 HIGHLIGHTS

## Business Attraction & Expansion

- Q4: 4,690 jobs, \$453.4 million in capital investment
- FY15 Results

## Trade & International Growth

- International Paris Air Show
- Arizona Trade and Investment Office in Mexico City

## Innovation & Entrepreneurship

- Arizona Innovation Challenge



# FY2015 CURRENT CLIENT ACTIVITY

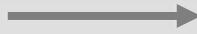


Universal Health Services, Inc.



# ACA FY2015-Q4 RESULTS

29 Q4 Projects



4,690 New Jobs  
 \$ 453.4 million in CapEx  
 \$ 41,142 Average Wage



Southwest

**FY15-Q4**

2,565 jobs  
 \$157.1M



Northeast

1,786 jobs  
 \$203.3M



Northwest

245 jobs  
 \$79.4M



California

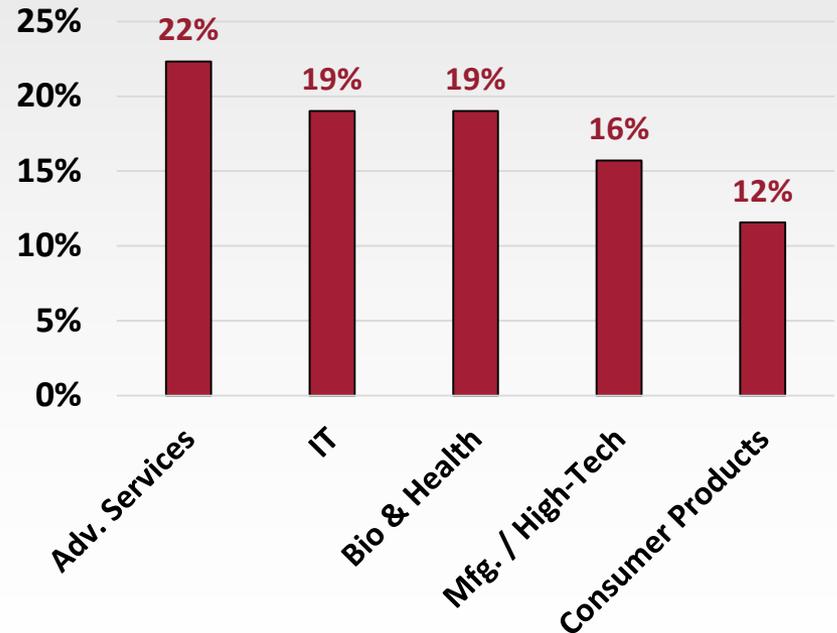
82 jobs  
 \$13.3M



Midwest

12 jobs  
 \$.3M

**FY15 Won Projects by Industry**



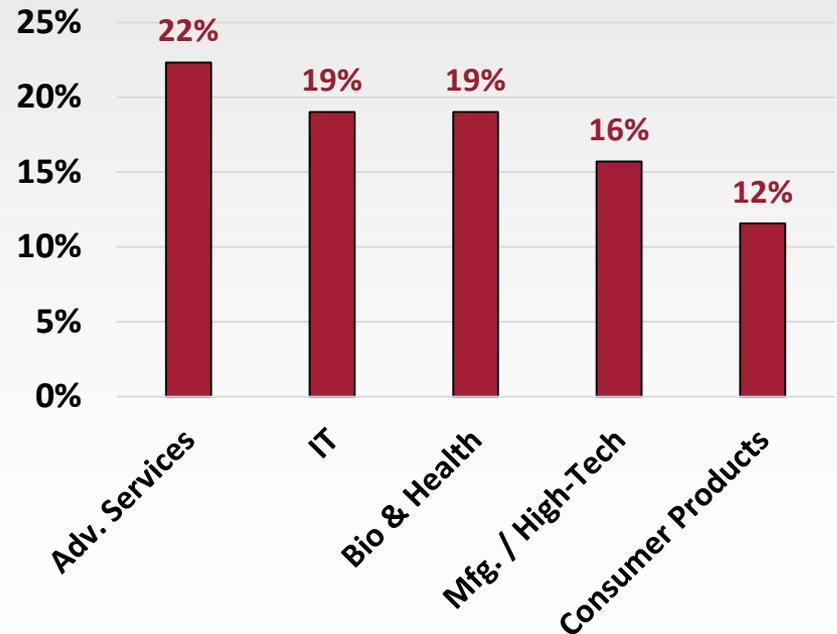
# ACA FY2015 RESULTS

120 **FY15** Projects →

**18,314** New Jobs  
**\$ 1.51 Billion** in CapEx  
**\$ 51,809** Average Wage

	FY15
 Southwest	8,914 jobs \$413.8M
 Northeast	4,407 jobs \$230.9M
 Northwest	924 jobs \$94.5M
 California	2,313 jobs \$538M
 Midwest	1,196 jobs \$137.3M

**FY15 Won Projects by Industry**



# ACA BUSINESS PLAN: KEY METRICS

Key Metric	Actual YTD	FY'15 Goal	% to Goal	<i>FY'16 Goal</i>
Jobs	18,314	15,000	122%	<i>17,000</i>
Cap Ex	\$1.51B	\$1.2B	126%	<i>\$1.3B</i>
Avg. Salary	\$51,809	\$53,439	97%	<i>\$55,145</i>
Net New Opportunities Added to Pipeline	308	300	102%	<i>320</i>



# CEO UPDATE: **TRADE MISSIONS**

## Trade Delegation, **MEXICO**

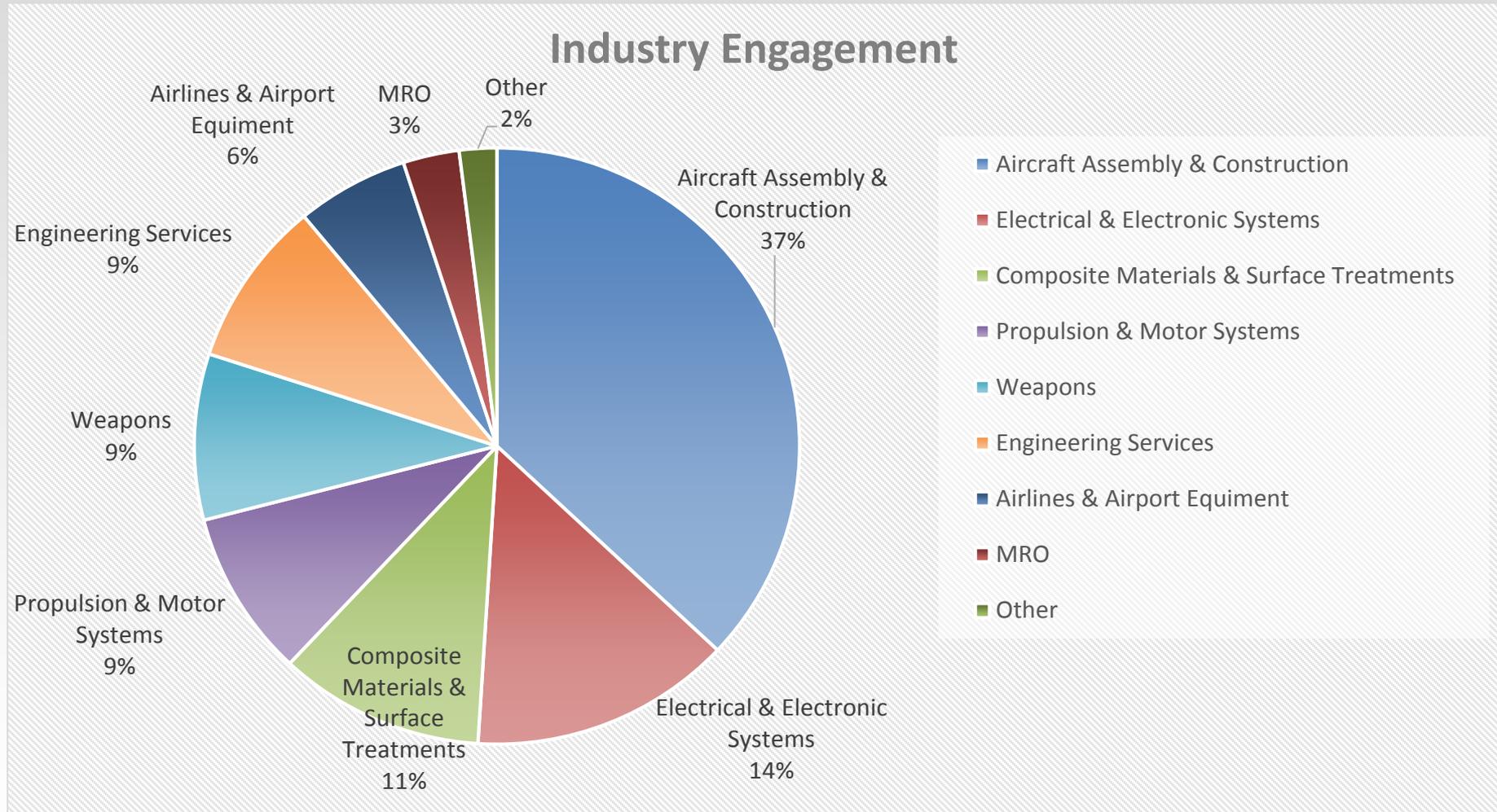
- Discussions with top industry and government leaders
- First and only Letter of Intent between a U.S. state and INADEM
- \$15.9 billion in bilateral trade (2014; record)

## 2015 Paris Air Show, **FRANCE**

- One-on-one meetings with 35 top industry leaders
- Business attraction and prospecting
  - Qualified opportunities: 1,783 jobs

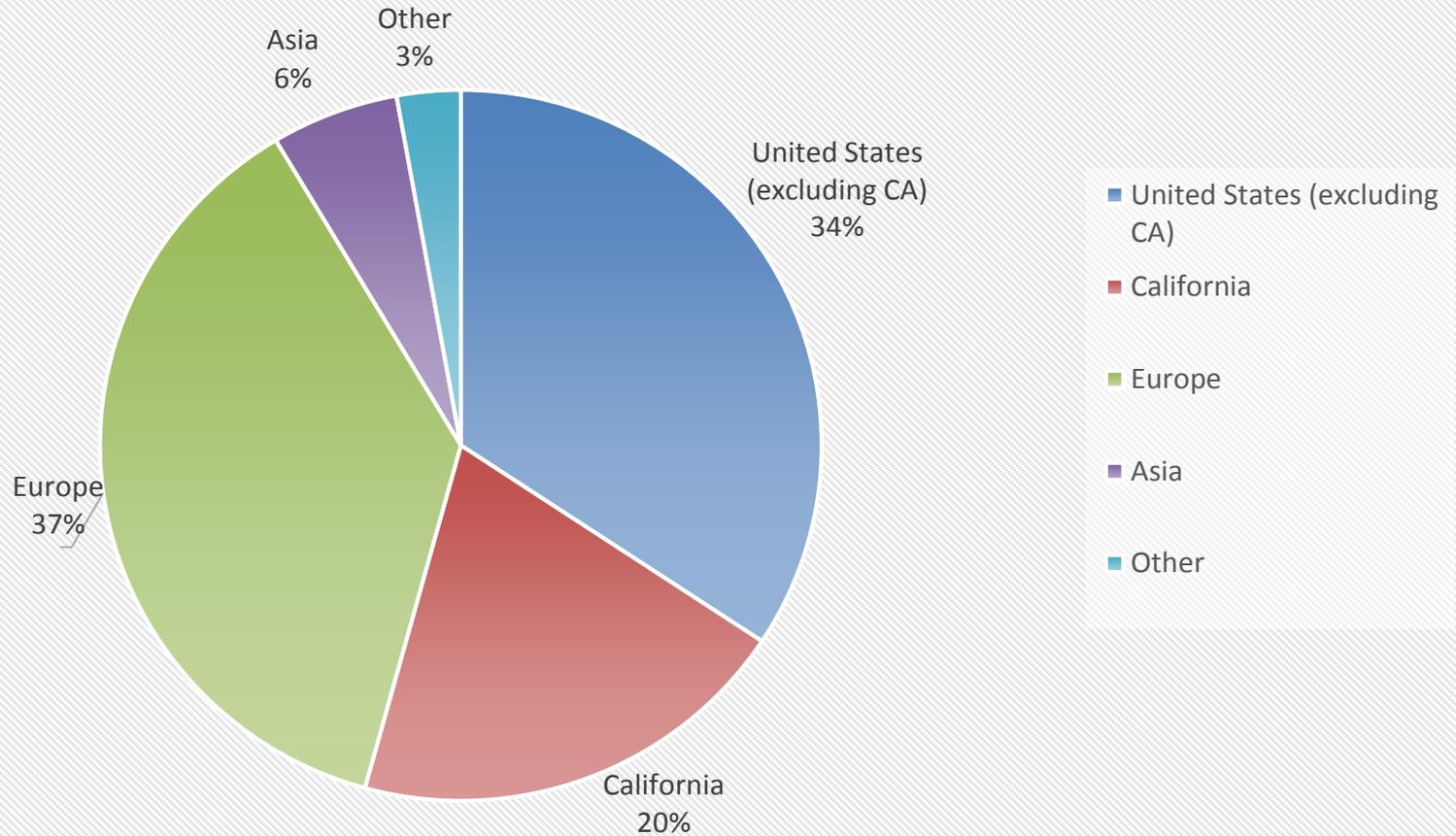


# CEO UPDATE: PARIS AIR SHOW



# CEO UPDATE: PARIS AIR SHOW

## Industry Geographics



# ACA JOBS AND PIPELINE REPORT

KEVIN J. SULLIVAN, SENIOR VICE PRESIDENT  
BUSINESS ATTRACTION & EXPANSION



# ACA BUSINESS PIPELINE

**223 Opportunities**  
**\$ 11.2 billion** in CapEx  
**42,469** New Jobs  
**\$ 46,556** Average Wage

## Origin (Attraction)



Northeast: 17%



Midwest: 20%



Southwest: 12%



California: 16%



International: 21%



Southeast: 8%

## Industry (Total)

- 23% Manufacturing
- 9% Renewable
- 8% A&D
- 16% Traditional
- 12% IT/Software
- 12% Business/Financial
- 15% Consumer Products
- 5% Bio/Healthcare



# ACA BUSINESS EXPANSION PIPELINE

**62 Opportunities**  
**\$ 570.7 million** in CapEx  
**4,789 New Jobs**  
**\$ 53,193 Average Wage**

## Origin (Expansion)



**Northern AZ: 3%**  
➤ Flagstaff



**Central AZ: 84%**  
➤ Phoenix  
➤ Scottsdale  
➤ Mesa  
➤ Tempe



**Southern AZ: 13%**  
➤ Tucson  
➤ Marana

## Industry (Total)

- 47% Manufacturing
- 18% Bio/Healthcare
- 12% A&D
- 12% Business/Financial
- 10% IT/Software

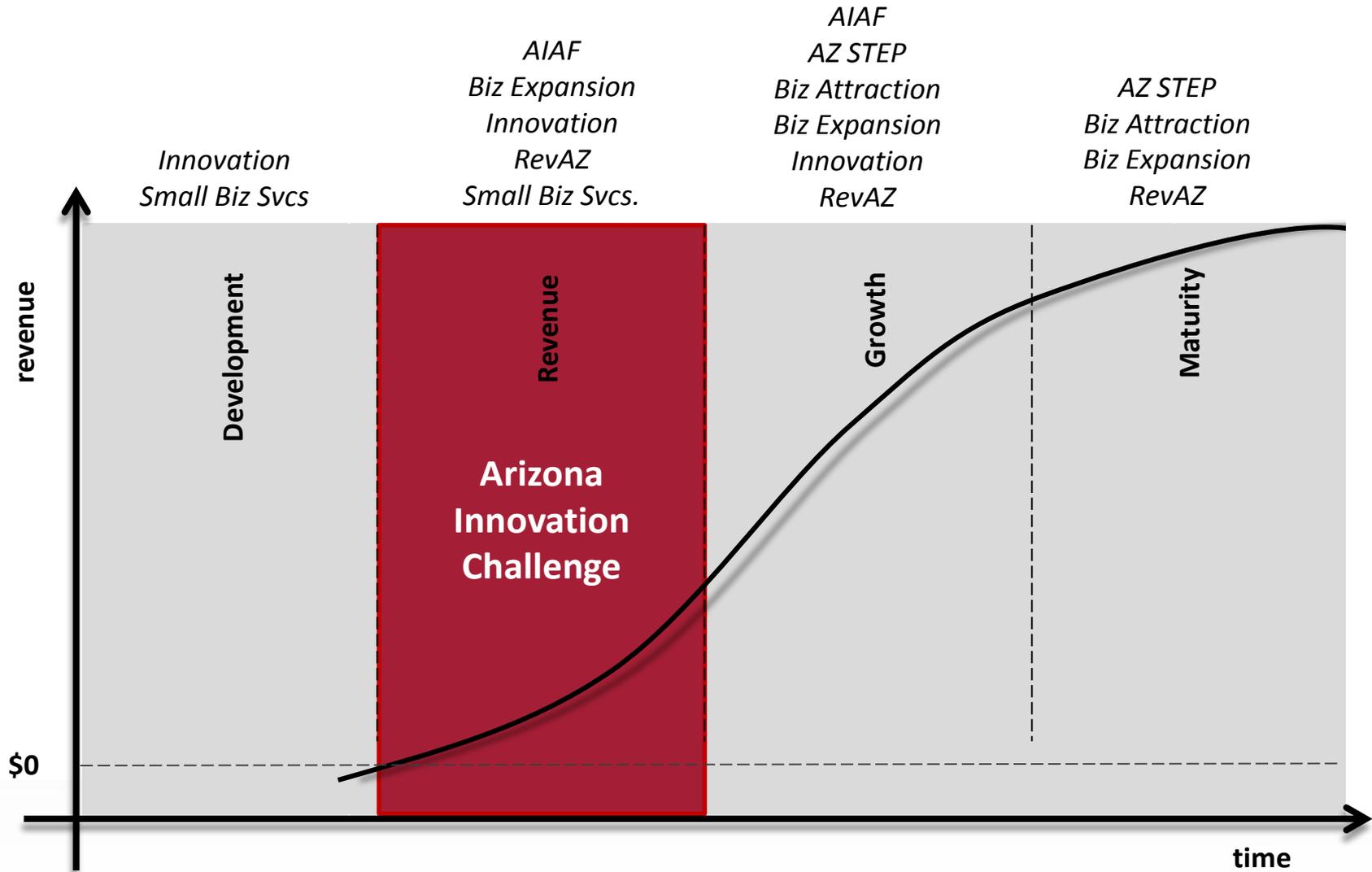


# ACA BUSINESS DEVELOPMENT REPORT

BRIAN SHERMAN, SENIOR VICE PRESIDENT  
BUSINESS DEVELOPMENT



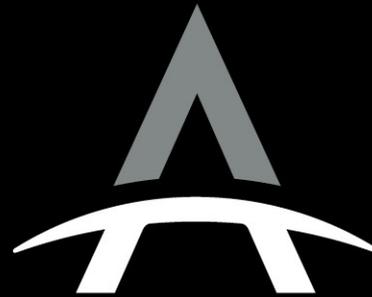
# CONTINUUM OF CREATION INITIATIVES



# ARIZONA INNOVATION CHALLENGE

- AIC grants management process
- Ongoing services and reporting
- 44 awards
  - Jobs: **187**
  - Average salary: **\$76,017**
  - CapEx: **\$6.8 million**
  - Revenue **\$40.3 million**
  - Capital Formation **\$39.5 million**





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