

**JUNE 12, 2018**

# BOARD OF DIRECTORS MEETING PUBLIC SESSION





# PUBLIC SESSION AGENDA

- 1 FY 18 RESULTS
- 2 FY 18 RESULTS: HEADQUARTERS
- 3 FY 18 ACA CLIENT ACTIVITY
- 4 PIPELINE UPDATES

# FY 18 RESULTS

PROJECTS

87

NEW JOBS\*

25,978

AVERAGE WAGE

\$58,304

CAPEX

\$3.8B

SOUTHWEST



8,978 NEW JOBS

\$2.7B CAPEX

CALIFORNIA



4,735 NEW JOBS

\$297M CAPEX

MIDWEST



3,415 NEW JOBS

\$72.7M CAPEX

EAST



3,214 NEW JOBS

\$348M CAPEX

WEST



2,522 NEW JOBS

\$162M CAPEX

SOUTHEAST



1,696 NEW JOBS

\$103M CAPEX

INTERNATIONAL



1,418 NEW JOBS

\$149M CAPEX

37%

BUSINESS/FINANCIAL

18%

IT/SOFTWARE

14%

MANUFACTURING

13%

LOGISTICS

9%

AEROSPACE & DEFENSE

6%

BIO/HEALTHCARE

2%

OTHER

1%

CONSUMER PRODUCTS

\*Five-year numbers

# FY 18 RESULTS: HEADQUARTERS

13

PROJECTS

3,085

NEW JOBS

\$74,347

AVERAGE WAGE

\$154M

CAPEX

WEST



30%

914 NEW JOBS  
\$10M CAPEX

INTERNATIONAL



28%

873 NEW JOBS  
\$94M CAPEX

SOUTHWEST



28%

855 NEW JOBS  
\$34M CAPEX

EAST



10%

315 NEW JOBS  
\$11M CAPEX

SOUTHEAST



4%

128 NEW JOBS  
\$4M CAPEX

43%

AEROSPACE &  
DEFENSE

24%

BIOSCIENCE/  
HEALTHCARE

18%

BUSINESS/  
FINANCIAL

5%

IT/SOFTWARE

4%

MANUFACTURING

4%

OTHER

2%

CONSUMER PRODUCTS

\*Five-year numbers

# FY 18 ACA CLIENT ACTIVITY



\*Not all client logos reflected



# PIPELINE UPDATES



# BUSINESS ATTRACTION PIPELINE

130

OPPORTUNITIES

32,342

NEW JOBS

\$54,532

AVERAGE WAGE

\$10.9B

CAPEX

CALIFORNIA



32%

EAST



28%

INTERNATIONAL



15%

MIDWEST



12%

SOUTHEAST



7%

SOUTHWEST



6%

23%  
MANUFACTURING

23%  
BUSINESS/  
FINANCIAL

17%  
IT/SOFTWARE

14%  
AEROSPACE  
& DEFENSE

7%  
RENEWABLE  
ENERGY

6%  
BIOSCIENCE/  
HEALTHCARE

5%  
OTHER

3%  
LOGISTICS

\*2% CONSUMER PRODUCTS

# CALIFORNIA BUSINESS PIPELINE

46

OPPORTUNITIES

10,425

NEW JOBS

\$47,246

AVERAGE WAGE

\$4.8B

CAPEX

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TOP INDUSTRIES

**BUSINESS & FINANCIAL SERVICES**

**MANUFACTURING**

**BIO/HEALTHCARE**

# CALIFORNIA PIPELINE BY INDUSTRY

## MANUFACTURING

**11 PROJECTS**

JOB: 2,386  
\$294 MILLION CAPEX  
WAGES: \$45,098

## AEROSPACE & DEFENSE

**7 PROJECTS**

JOB: 1,231  
\$182 MILLION CAPEX  
WAGES: \$61,942

## BUSINESS & FINANCIAL

**6 PROJECTS**

JOB: 2,880  
\$60 MILLION CAPEX  
WAGES: \$38,973

## BIOSCIENCE & HEALTHCARE

**6 PROJECTS**

JOB: 1,275  
\$204 MILLION CAPEX  
WAGES: \$47,312

## INFORMATION TECHNOLOGY

**6 PROJECTS**

JOB: 1,029  
\$12.8 MILLION CAPEX  
WAGES: \$70,091

## OTHER

**5 PROJECTS**

JOB: 600  
\$27.2 MILLION CAPEX  
WAGES: \$41,310

## RENEWABLE ENERGY

**3 PROJECTS**

JOB: 449  
\$4 BILLION CAPEX  
WAGES: \$46,025

## TRANSPORTATION & LOGISTICS

**2 PROJECTS**

JOB: 600  
\$27 MILLION CAPEX  
WAGES: \$41,310

## COMBINED TOTAL

46 projects  
\$4.8B capex

10,425 jobs  
\$47,246 wages

# BUSINESS EXPANSION PIPELINE

54

OPPORTUNITIES

8,253

NEW JOBS

\$56,405

AVERAGE WAGE

\$3.8B

CAPEX

24%

BIOSCIENCE/  
HEALTHCARE

23%

IT/SOFTWARE

17%

BUSINESS/  
FINANCIAL

14%

MANUFACTURING

9%

AEROSPACE &  
DEFENSE

9%

RENEWABLE  
ENERGY

2%

LOGISTICS

2%

OTHER

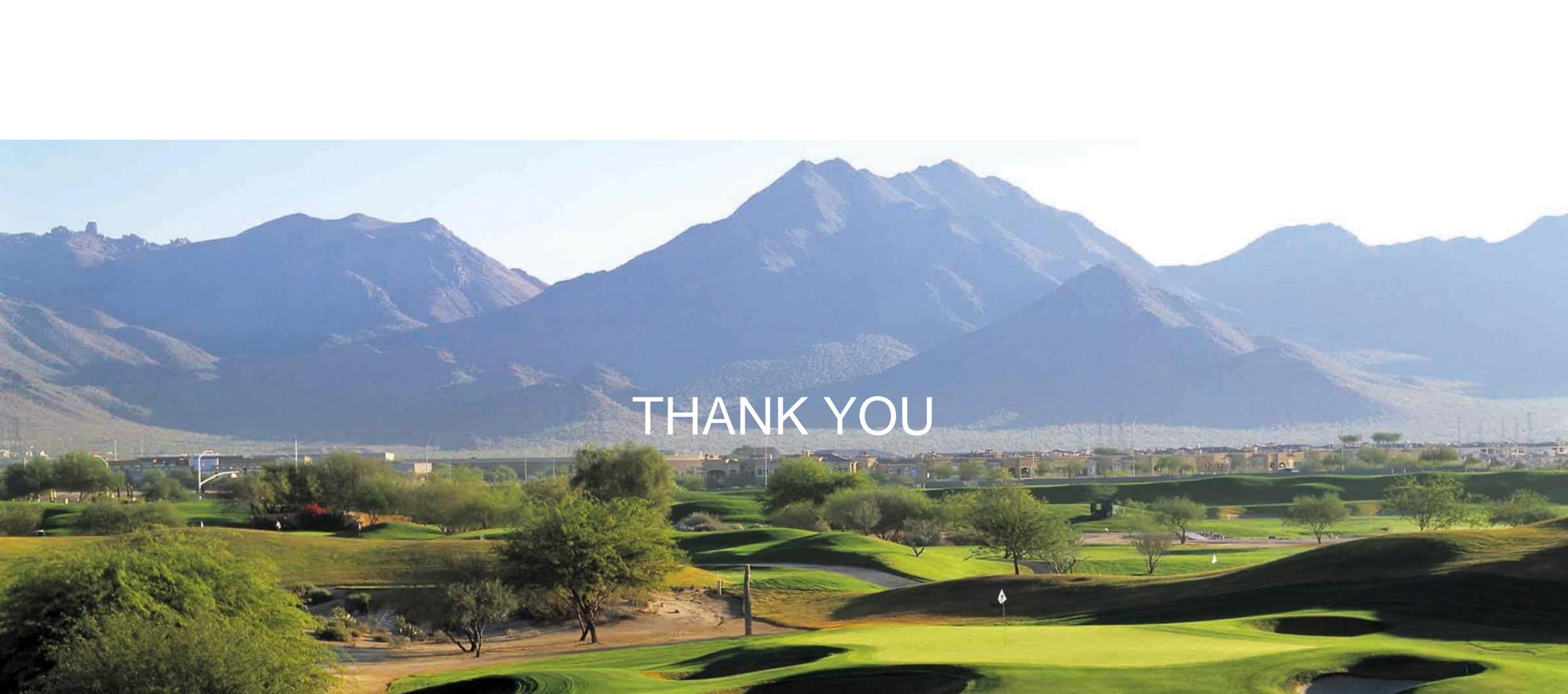
# TOTAL BUSINESS ATTRACTION & EXPANSION PIPELINE

## BY INDUSTRY

MANUFACTURING	INFORMATION TECHNOLOGY	BUSINESS & FINANCIAL	AEROSPACE & DEFENSE
<b>55 PROJECTS</b>	<b>33 PROJECTS</b>	<b>26 PROJECTS</b>	<b>19 PROJECTS</b>
JOB: 8,539 \$2.3 BILLION CAPEX WAGES: \$45,676	JOB: 7,099 \$3.1 BILLION CAPEX WAGES: \$66,833	JOB: 8,480 \$1.8 BILLION CAPEX WAGES: \$50,019	JOB: 5,253 \$673 MILLION CAPEX WAGES: \$75,389
OTHER	BIOSCIENCE	RENEWABLE ENERGY	TRANSPORTATION & LOGISTICS
<b>18 PROJECTS</b>	<b>15 PROJECTS</b>	<b>12 PROJECTS</b>	<b>6 PROJECTS</b>
JOB: 2,341 \$959 MILLION CAPEX WAGES: \$45,234	JOB: 3,890 \$427 MILLION CAPEX WAGES: \$54,794	JOB: 3,791 \$4.5 BILLION CAPEX WAGES: \$49,444	JOB: 1,202 \$186 MILLION CAPEX WAGES: \$36,092
<b>COMBINED TOTAL</b>			

184 projects  
\$14B capex

40,595 jobs  
\$54,913 wages



THANK YOU

