

FEBRUARY 12, 2020

BOARD OF DIRECTORS MEETING PUBLIC SESSION





PUBLIC SESSION AGENDA

- 1 GOVERNOR DUCEY WELCOME AND REMARKS
- 2 CONSENT AGENDA
- 3 CEO UPDATE
 - FY 20 YTD RESULTS
 - CLIENT ACTIVITY
 - PIPELINE UPDATES

FY '20 YTD RESULTS

PROJECTS

76

NEW JOBS

14,707

AVERAGE WAGE

\$66,091

CAPEX

\$3B

TARGET INDUSTRIES	BUSINESS & FINANCIAL SERVICES	TECHNOLOGY & INNOVATION	CONSUMER PRODUCTS & SERVICES	AEROSPACE & DEFENSE	BIOSCIENCE & HEALTH CARE
BY JOBS	32%	28%	18%	10%	9%
BY PROJECTS	12%	32%	22%	13%	14%

SOUTHWEST



7,803 NEW JOBS
\$1.1B CAPEX

MIDWEST



1,970 NEW JOBS
\$456M CAPEX

SOUTHEAST



1,805 NEW JOBS
\$134M CAPEX

CALIFORNIA



1,698 NEW JOBS
\$76M CAPEX

INTERNATIONAL



402 NEW JOBS
\$689M CAPEX

WEST



241 NEW JOBS
\$509M CAPEX

FY '20 YTD ACA CLIENT ACTIVITY

Business Attraction & Expansion



*Not all client logos reflected



PIPELINE UPDATES



TOTAL PIPELINE BY PROJECT TYPE

247

PROJECTS

51,823

NEW JOBS

\$57,591

AVERAGE WAGE

\$26.7B

CAPEX

MANUFACTURING

124 PROJECTS

JOBS: 24,634
\$20.9B CAPEX
WAGES: \$51,729

OFFICE

61 PROJECTS

JOBS: 17,659
\$1.1B CAPEX
WAGES: \$64,128

HEADQUARTERS

22 PROJECTS

JOBS: 3,784
\$639M CAPEX
WAGES: \$61,505

LOGISTICS

18 PROJECTS

JOBS: 3,044
\$1.1B CAPEX
WAGES: \$44,017

DATA CENTER

9 PROJECTS

JOBS: 350
\$2.1B CAPEX
WAGES: \$78,500

RESEARCH & DEVELOPMENT

6 PROJECTS

JOBS: 565
\$377M CAPEX
WAGES: \$128,650

MEDICAL FACILITY

5 PROJECTS

JOBS: 1,194
\$182M CAPEX
WAGES: \$66,363

TRAINING FACILITY

2 PROJECTS

JOBS: 593
\$299M CAPEX
WAGES: \$53,434

BUSINESS ATTRACTION PIPELINE

171
PROJECTS

41,674
NEW JOBS

\$58,098
AVERAGE WAGE

\$24.8B
CAPEX

CALIFORNIA



40%

EAST



18%

INTERNATIONAL



14%

SOUTHWEST



11%

MIDWEST



9%

SOUTHEAST



5%

WEST



3%

TARGET INDUSTRIES (BY PROJECTS)

39%
CONSUMER
PRODUCTS &
SERVICES

27%
TECHNOLOGY &
INNOVATION

12%
BUSINESS &
FINANCIAL
SERVICES

10%
AEROSPACE &
DEFENSE

5%
BIOSCIENCE &
HEALTHCARE

5%
LOGISTICS

3%
NATURAL
RESOURCES

CALIFORNIA BUSINESS PIPELINE

68

PROJECTS

14,152

NEW JOBS

\$64,630

AVERAGE WAGE

\$4.3B

CAPEX

TARGET INDUSTRIES (BY PROJECTS)

38%

TECHNOLOGY &
INNOVATION

34%

CONSUMER
PRODUCTS &
SERVICES

9%

AEROSPACE &
DEFENSE

7%

BUSINESS &
FINANCIAL
SERVICES

6%

LOGISTICS

4%

BIOSCIENCE &
HEALTHCARE

1%

NATURAL
RESOURCES

BUSINESS EXPANSION PIPELINE

76
PROJECTS

10,149
NEW JOBS

\$55,506
AVERAGE WAGE

\$1.9B
CAPEX

TARGET INDUSTRIES (BY PROJECTS)

29%
TECHNOLOGY &
INNOVATION

25%
CONSUMER
PRODUCTS &
SERVICES

21%
AEROSPACE &
DEFENSE

17%
BIOSCIENCE &
HEALTHCARE

4%
BUSINESS &
FINANCIAL
SERVICES

4%
NATURAL
RESOURCES



THANK YOU

