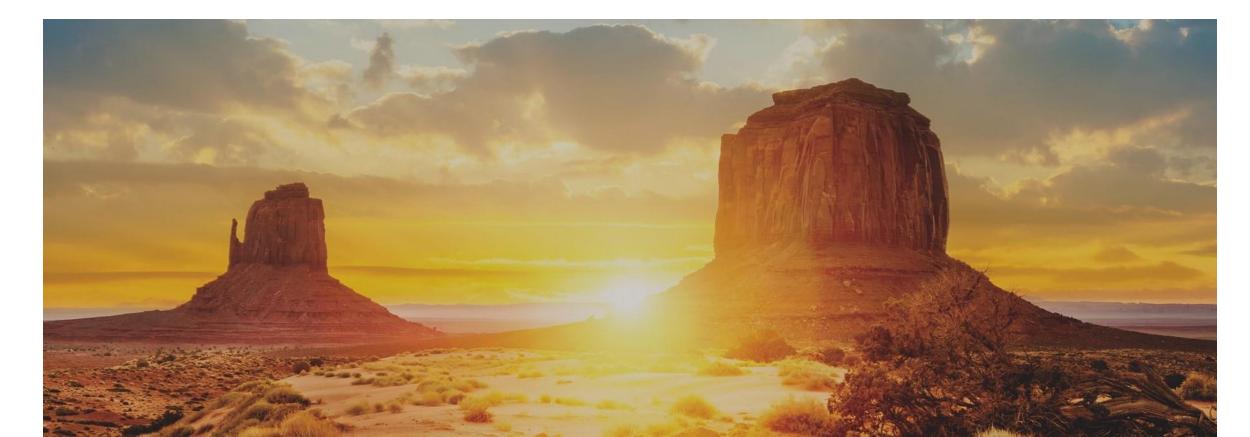


FEBRUARY 12, 2020

BOARD OF DIRECTORS MEETING PUBLIC SESSION





PUBLIC SESSION AGENDA

- 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



\$509M CAPEX



FY '20 YTD ACA CLIENT ACTIVITY

Business Attraction & Expansion























































































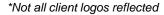




















TOTAL PIPELINE BY PROJECT TYPE

247

51,823

\$57,591

\$26.7B

PROJECTS

NEW JOBS

AVERAGE WAGE

CAPEX

MANUFACTURING

OFFICE

61 PROJECTS

HEADQUARTERS

LOGISTICS

124 PROJECTS

JOBS: 24,634 JOBS: 17,659 \$20.9B CAPEX \$1.1B CAPEX WAGES: \$51,729 WAGES: \$64,128 **22 PROJECTS**

JOBS: 3,784 \$639M CAPEX WAGES: \$61,505 **18 PROJECTS**

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

DATA CENTER

RESEARCH & DEVELOPMENT

MEDICAL FACILITY

TRAINING FACILITY

9 PROJECTS

JOBS: 350 \$2.1B CAPEX WAGES: \$78,500 6 PROJECTS

JOBS: 565 \$377M CAPEX WAGES: \$128,650 **5 PROJECTS**

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

EAST

INTERNATIONAL

SOUTHWEST

MIDWEST

SOUTHEAST

WEST



40%

18%



14%

11%

9%



5%



3%

TARGET
INDUSTRIES
(BY PROJECTS)

39%
CONSUMER
PRODUCTS &
SERVICES

27%
TECHNOLOGY & INNOVATION

12%
BUSINESS &
FINANCIAL
SERVICES

% 10%
ESS & 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

TARGET
INDUSTRIES
(BY PROJECTS)

29% 25% 21% **TECHNOLOGY & CONSUMER AEROSPACE & INNOVATION** PRODUCTS & **DEFENSE** SERVICES 17% 4% 4% **BUSINESS &** NATURAL **BIOSCIENCE &** FINANCIAL **RESOURCES HEALTHCARE SERVICES**





