

SEPTEMBER 14, 2017

BOARD OF DIRECTORS MEETING



ACA FIVE-YEAR RESULTS & ECONOMIC IMPACT



FIVE YEARS OF STRENGTHENING ARIZONA'S ECONOMY

FY 2013–FY 2017 RESULTS



87,132

PROJECTED
NEW JOBS

▲ 116% OF
75,000 GOAL



\$9.5 BILLION

CAPITAL
INVESTMENT

▲ 158% OF \$6.0
BILLION GOAL



\$52,577

AVERAGE
WAGES

▲ 98% OF
\$53,803 GOAL



FIVE YEARS OF STRENGTHENING **ARIZONA'S ECONOMY** FY 2013–FY 2017 ECONOMIC IMPACT



\$118.73B
Economic Output



200,029
Direct, Indirect
And Induced Jobs



\$3.00B
Tax Revenue





ACA FY 2017 RESULTS



Q3+Q4 FY2017 CLIENT ACTIVITY





ACA PIPELINE UPDATES

Kevin Sullivan, SVP, Business Attraction & Expansion



BUSINESS ATTRACTION PIPELINE

125*

OPPORTUNITIES

95,528

NEW JOBS

\$76,971

AVERAGE WAGE

\$15B

CAPEX

BY ORIGIN



California
41%



Midwest
11%



Southwest
6%



East
18%



International
15%



Southeast
6%

BY INDUSTRY

21%
Consumer
Products

16%
Business/
Financial

15%
Manufacturing

11%
Aerospace
& Defense

11%
Traditional

7%
IT/Software

7%
Bioscience/
Healthcare

3%
Renewable
Energy



BUSINESS EXPANSION PIPELINE

72* OPPORTUNITIES 19,592 NEW JOBS \$54,947 AVERAGE WAGE \$9.5B CAPEX

BY ORIGIN

CENTRAL ARIZONA

91%

Phoenix • Tempe • Chandler
Mesa • Gilbert • Scottsdale

SOUTHERN ARIZONA

9%

Tucson

BY INDUSTRY

13%

Consumer
Products

11%

Business/
Financial

13%

Manufacturing

10%

Aerospace
& Defense

7%

Traditional

24%

IT/Software

7%

Bioscience/
Healthcare

3%

Renewable
Energy



CALIFORNIA BUSINESS PIPELINE

56*

OPPORTUNITIES

16,759

NEW JOBS

\$49,815

AVERAGE WAGE

\$10.1B

CAPEX

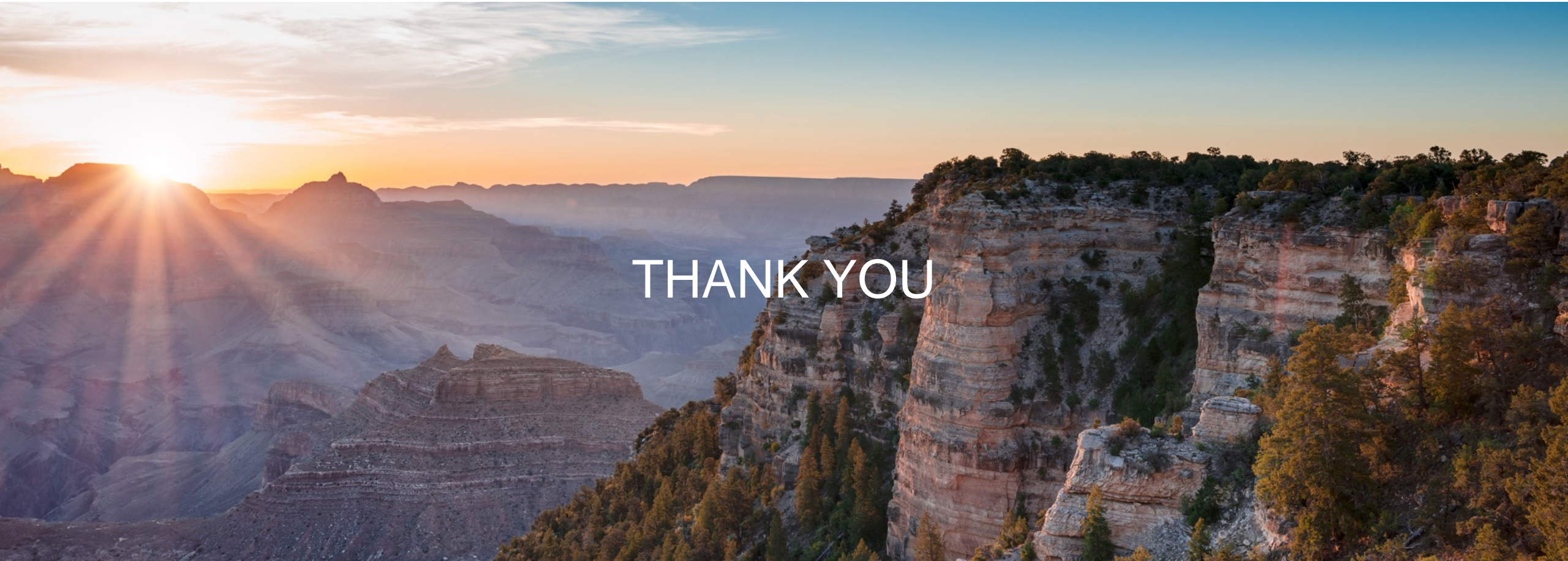
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NET NEW CALIFORNIA
OPPORTUNITIES FYTD

TOP INDUSTRIES

CONSUMER PRODUCTS
BUSINESS/FINANCIAL
IT/SOFTWARE





THANK YOU

