

SEPTEMBER 6, 2023

# ARIZONA'S WORKFORCE

**ARIZONA**  
COMMERCE AUTHORITY



# GETTING OUR START

Engaged **320+** community leaders  
representing **180** public/private organizations

Reviewed best practices from **50** states  
+ **3** international markets

**January 4, 2010**

Gov. Brewer creates "Governor's  
Commerce Advisory Council"

**February 17, 2011**

Gov. Brewer signs Arizona  
Competitiveness Package into law

**June 29, 2010**

Gov. Brewer issues Executive Order  
creating ACA

**July 1, 2011**

Arizona Commerce Authority begins

# STRENGTHEN ARIZONA'S ECONOMY



# FOCUSED ON HIGH VALUE INDUSTRIES



**AEROSPACE & DEFENSE**  
AIRCRAFT  
SPACECRAFT  
MAINTENANCE, REPAIR &  
OVERHAUL



**BIOSCIENCE & HEALTH CARE**  
MEDICAL DEVICES  
THERAPEUTICS  
PHARMACEUTICALS



**BUSINESS & FINANCIAL SERVICES**  
BANKING  
INSURANCE  
CENTERS OF EXCELLENCE



**FILM & DIGITAL MEDIA**  
FILM & VIDEO PRODUCTION  
COMMERCIAL PHOTOGRAPHY  
CONTENT STUDIOS



**MANUFACTURING**  
AUTOMOTIVE  
BATTERY  
CONSUMER PRODUCTS



**TECHNOLOGY & INNOVATION**  
SEMICONDUCTOR  
SOFTWARE  
DATACENTER

# TRANSFORMING ARIZONA'S ECONOMY



# WINS SINCE INCEPTION



# EXPLOSIVE GROWTH

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## #1

**FASTEST  
YEAR-OVER-YEAR  
MANUFACTURING  
JOB GROWTH  
IN THE NATION**



*Business Facilities,  
2022 State Rankings*

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### #1

**GUIDED-MISSILE & SPACE VEHICLE  
MANUFACTURING JOB GROWTH RATE  
IN 2021**

*Lightcast, 2022*

### #2

**GUIDED MISSILES & SPACE  
VEHICLE MANUFACTURING  
EMPLOYMENT IN 2021**

*Lightcast, 2022*

### #2

**BIOSCIENCE MANUFACTURING JOB  
GROWTH FROM 2017 TO 2021**

*Lightcast, 2022*

### #3

**PRODUCTION OCCUPTIONS JOB  
GROWTH FROM 2017 TO 2021**

*Lightcast, 2022*

### #3

**OPTICS AND PHOTONICS  
MANUFACTURING JOB GROWTH  
RATE FROM 2017 TO 2021**

*Lightcast, 2022*

### TOP 3

**TOP 3 STATE SEMICONDUCTOR  
EMPLOYMENT**

*Business Facilities, 2022*

.....

## MANUFACTURING EMPLOYMENT 2017 - 2021



ARIZONA  
**12%**

U.S. AVERAGE

**-1%**



Semiconductor  
Manufacturers & Suppliers



Aerospace &  
Defense



Cybersecurity



Optics &  
Photonics



Medical  
Technology



Automated &  
Electric Vehicles



Battery &  
Energy Storage



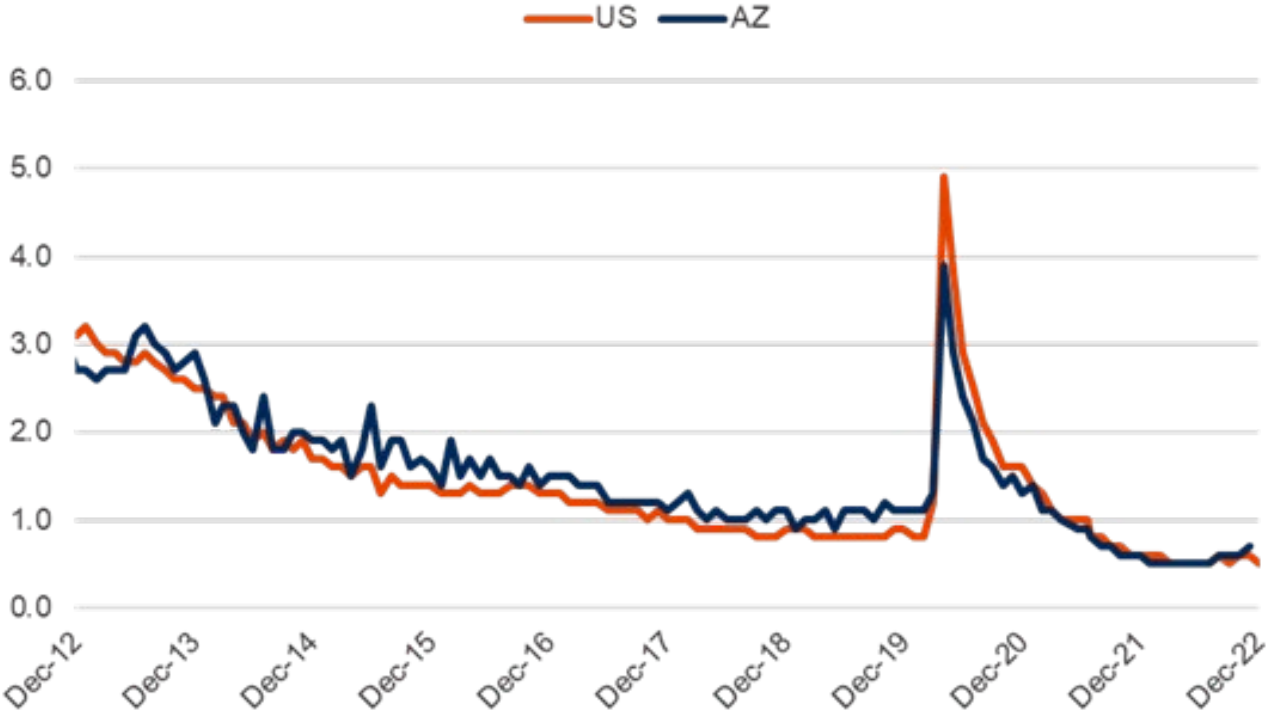
Data Centers





# NATIONAL LABOR DEMAND

Unemployed Persons Per Job Openings Ratio



**Feb '12:**

4 unemployed workers per job opening in AZ

**Feb '20:**

1.1 unemployed workers per job opening in AZ

**Dec '22:**

0.7 unemployed workers per job opening in AZ

# THE CHANGING NATURE OF WORK



## MANUFACTURING

Manufacturing is expected to have **2.1 million unfilled jobs** in the U.S. by 2030



## RESKILLING

**More than 100 million workers** globally will need to find a different occupation by 2030, with at least half requiring new, more advanced skills



## OFFICE VS TELEWORK

In June, **58% of respondents** whose jobs can be done from home reported teleworking compared to **20% prior to the pandemic**

# WORKFORCE



# KEEPING ARIZONA'S WORKFORCE STRONG



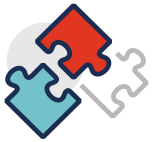
## Collaboration, innovation and dedication keys to keeping Arizona's workforce strong

Guest Opinion // August 29, 2023



The key is to maintain a policy that includes strategic analysis related to workforce development. By identifying areas where workforce supply is short of demand, high ROI projects can serve to fill the vacant positions while also generating more tax revenue than the project cost. This is how profitable businesses operate and how our public policy planning needs to operate.

# MODELING WORKFORCE EXCELLENCE



## CONNECT

Clients with a series of industry specific talent development and talent delivery programs



## COLLABORATE

With educators, job seekers, industry partnerships & community leaders to facilitate meaningful talent employer connections



## CUSTOMIZE

Training solutions for current and new employees to accelerate specialized and necessary skills



ARIZONA ADVANCED  
TECHNOLOGY NETWORK



LUCID

Raytheon

ARIZONA  
COMMERCE AUTHORITY



SKILLS AND CERTIFICATIONS

Mechanical Systems | Electrical Systems | Electrical Controls | Hydraulics | Pneumatics Robotics |  
Electrical Wiring | Soldering | Process Controls | Industry 4.0 Data Analytics



# FUTURE48



## Yuma workforce accelerator for manufacturing training announced

KAWC | By Victor Calderón  
Published June 30, 2023 at 11:37 AM MST



The Yuma Future48 Workforce Accelerator, launched in partnership with Arizona Western College, will offer workforce training in electrical technology, advanced manufacturing, broadband fiber optics and solar installation in support of the region's aerospace and defense industries.

## PHOENIX BUSINESS JOURNAL

New accelerators across Arizona to provide advanced training in emerging industries

By Jeff Gifford - Digital Editor  
July 03, 2023, 05:30am MST

In Kingman, Mohave Community College is partnering on an accelerator that will support manufacturing, transportation and mining industries. A 30,000-square-foot facility will be built at Kingman Airport and Industrial Park and is expected to be completed in early 2025.

# THE FUTURE OF FUTURE48

In 2022, the State of Arizona committed **\$30 million** to create up to six new advanced manufacturing training centers.

## What to expect:

- Up to **four** additional manufacturing training centers, focused on:
  - **Semiconductors**
  - **Battery Manufacturing**
  - **Aerospace & Defense**
  - and **more...**





# AN ACTION PLAN FOR THE FUTURE

## WORKFORCE

Define workforce skill and education requirements

## INFRASTRUCTURE

Accelerate investment in physical assets for production & research

## SUPPLY CHAIN

Identify supply chain resiliency solutions

## ENTREPRENEURSHIP

Create access for entrepreneurs to invest capital and commercial infrastructure





## Gov. Hobbs announces initiative with TSMC microchip company aimed to help workers

By [AZFamily Digital News Staff](#)

Published: Aug. 4, 2023 at 7:34 AM MST | Updated: Aug. 4, 2023 at 8:27 AM MST



**PHOENIX (3TV/CBS 5)** -- A new program between Gov. Hobbs and TSMC microchip company is aiming to protect workers and bring more specialized apprentices to the state.

# WORLD-CLASS EDUCATION

122

TOTAL UNIVERSITIES AND COLLEGES

490,000+

STUDENTS ENROLLED

222

SCHOOLS OFFERING CAREER & TECHNICAL EDUCATION

Arizona State University

ENROLLED OVER

30,000

engineering students in Fall 2022

160%

increase in 10 years

University of Arizona

RECEIVED

\$26M

from the NSF to lead the Center for Quantum Networks

Northern Arizona University

RANKS IN THE

TOP 15%

for engineering programs in the United States



# TALENT IN ABUNDANCE

## ARIZONA

520,000+

WORKERS ADDED  
SINCE 2015

*Arizona Office of Economic Opportunity*

## MARICOPA COUNTY

#1

FOR TALENT ATTRACTION &  
RETENTION

5 OUT OF LAST 6 YEARS  
*Lightcast Talent Attraction Scorecard, 2022*

## PHOENIX

32% GROWTH

IN RESIDENTS IN THEIR 30S  
WITH COLLEGE DEGREES

(2016-2021)

3<sup>RD</sup>-BEST IN THE NATION  
*CBRE*

# A LOOK AHEAD



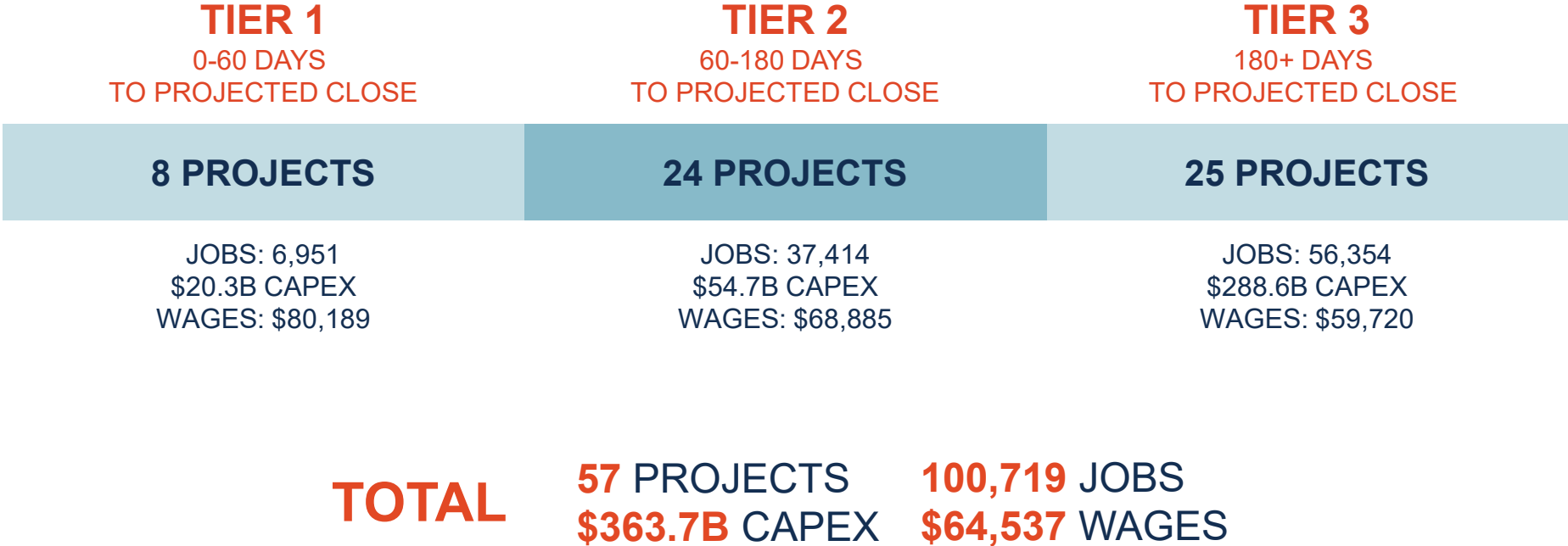
# TOTAL PIPELINE BY PROJECT TYPE

## Business Attraction & Expansion

MANUFACTURING	HEADQUARTERS	OFFICE	LOGISTICS	DATA CENTER	RESEARCH & DEVELOPMENT
<b>291 PROJECTS</b>	<b>41 PROJECTS</b>	<b>20 PROJECTS</b>	<b>23 PROJECTS</b>	<b>15 PROJECTS</b>	<b>5 PROJECTS</b>
JOB: 129,899 \$332.8B CAPEX WAGES: \$62,006	JOB: 7,121 \$9.4B CAPEX WAGES: \$67,561	JOB: 4,388 \$355.9M CAPEX WAGES: \$71,516	JOB: 2,741 \$1.2B CAPEX WAGES: \$52,254	JOB: 1,897 \$37.3B CAPEX WAGES: \$82,656	JOB: 3,246 \$3.6B CAPEX WAGES: \$82,656
	<b>TOTAL</b>	<b>402 PROJECTS</b> <b>\$385.5B CAPEX</b>	<b>149,942 JOBS</b> <b>\$63,596 WAGES</b>		

# MEGA PROJECT PIPELINE BY TIER

## Business Attraction & Expansion



**MEGA PROJECTS** ARE GENERALLY DEFINED AS MEETING AT LEAST **ONE** OF THE FOLLOWING CRITERIA: JOBS: **1,000+** AND/OR CAPEX: **\$500M+**

**THANK YOU**

**ARIZONA**  
COMMERCE AUTHORITY

