spotlight on the REGIONAL GROWTH FORECAST

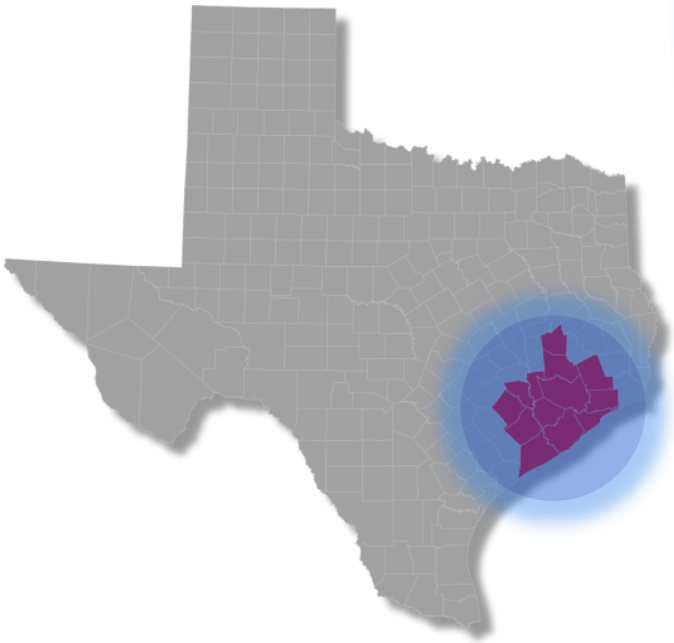
Welcome to the Spotlight on the Regional Growth Forecast!

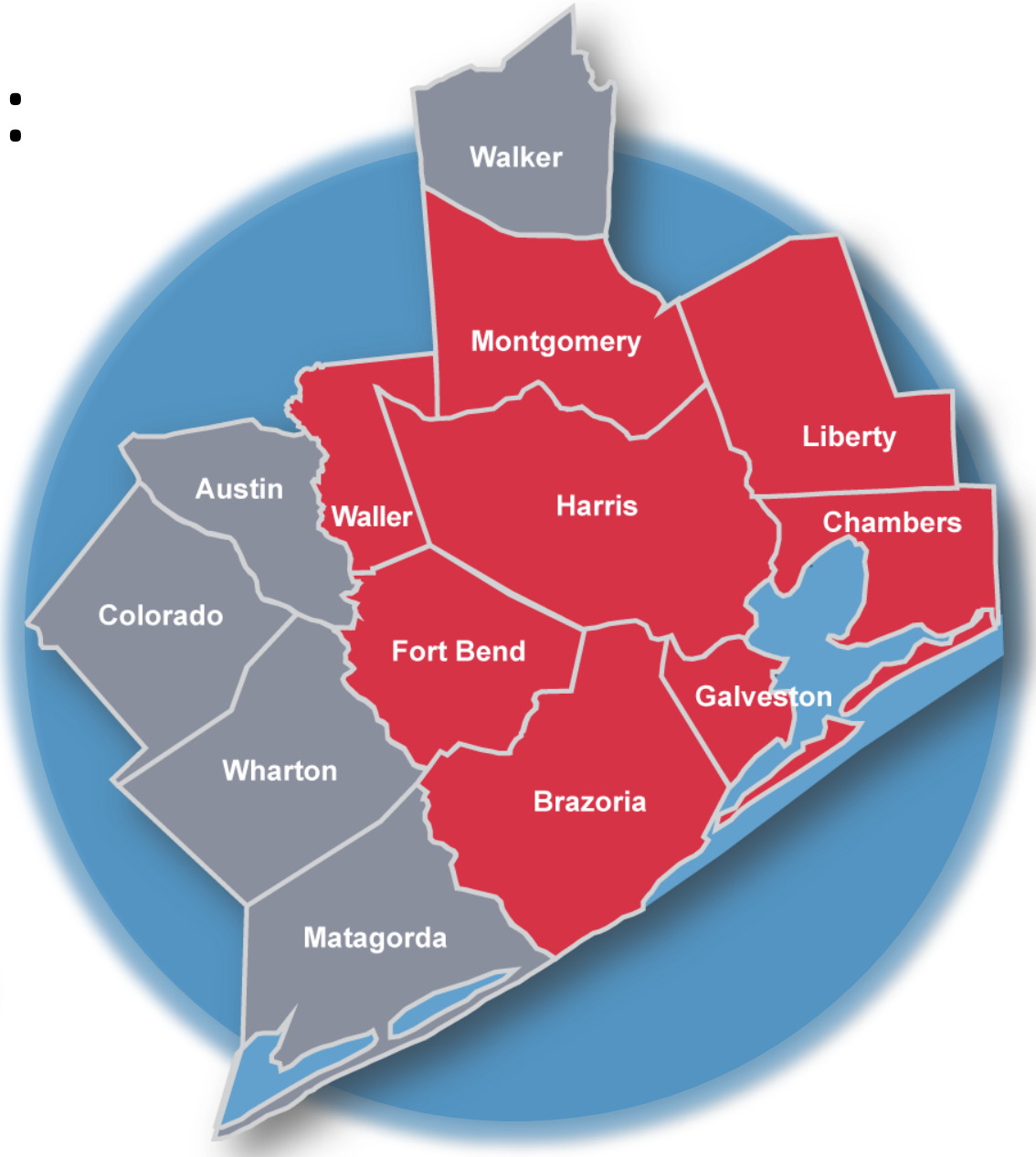
Friday, August 1, 2014

Houston-Galveston Area Council

H-GAC serves:

- **13 counties**
- **105 cities**
- **MPO for 8-county metro area**





Metropolitan Planning Organization (MPO) Responsibilities

- Develop Long Range Transportation Plan
- Support On-going Transportation Planning
- Approve short range state/federal project funding

Transportation Funding to the Region

- State/Federal
  - decennial census population
  - system size and condition
  - traffic volumes, transit ridership
  - air quality
  - Federal/State discretionary funds

Transportation Funding for Projects

- Goals in Regional Transportation Plan
- Evaluation measures
  - Safety
  - Mobility
  - Asset condition and service level
  - Economic impact

Role of Regional Economic and Demographic Forecast

- Understand Present and Future Travel
- Identify Impact/Benefits of Transportation Investments
- Informs Local Decisions
  - Transportation Priorities
  - Locally funded investments
  - Regional investments - Transportation Policy Council

Role of Demographic/Economic Forecasting

- **NOT** used to divide funding by political jurisdiction

- Is a transportation planning tool
  - Development "scenarios"
  - Target most robust transportation investment
  - Linked to other transportation models

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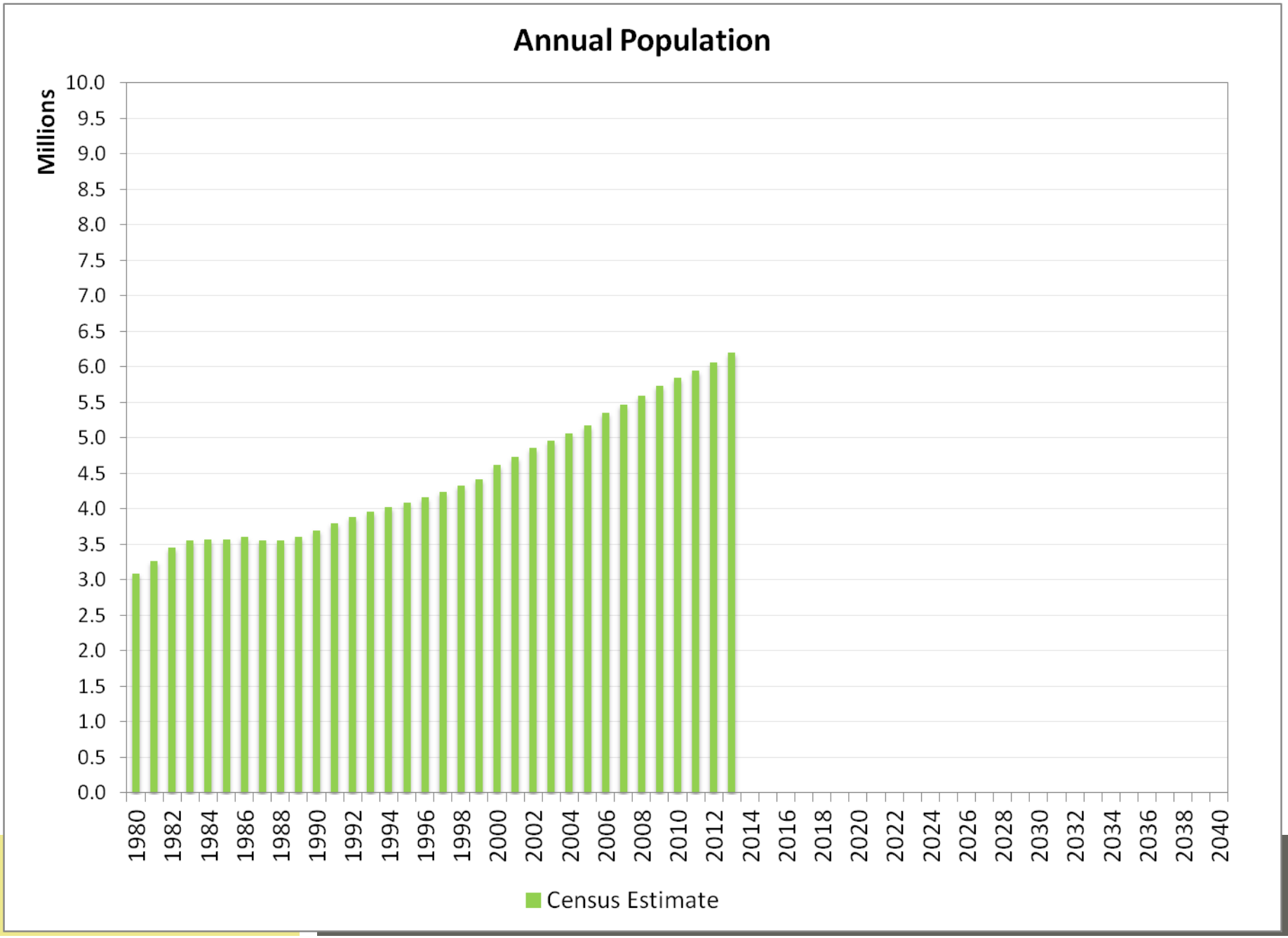
Friday, August 1, 2014

Houston-Galveston Area Council

Two Distinct Questions

1. How many people and jobs will be in our region 30 years from now?
   - Demographic and Employment Forecast
2. Where within the region will the people live and work?
   - Land Use Forecast

Part I: Demographic Forecast


Annual Population
Millions
10.0
9.5
9.0
8.5
8.0
7.5
7.0
6.5
6.0
5.5
5.0
4.5
4.0
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0.0
1980
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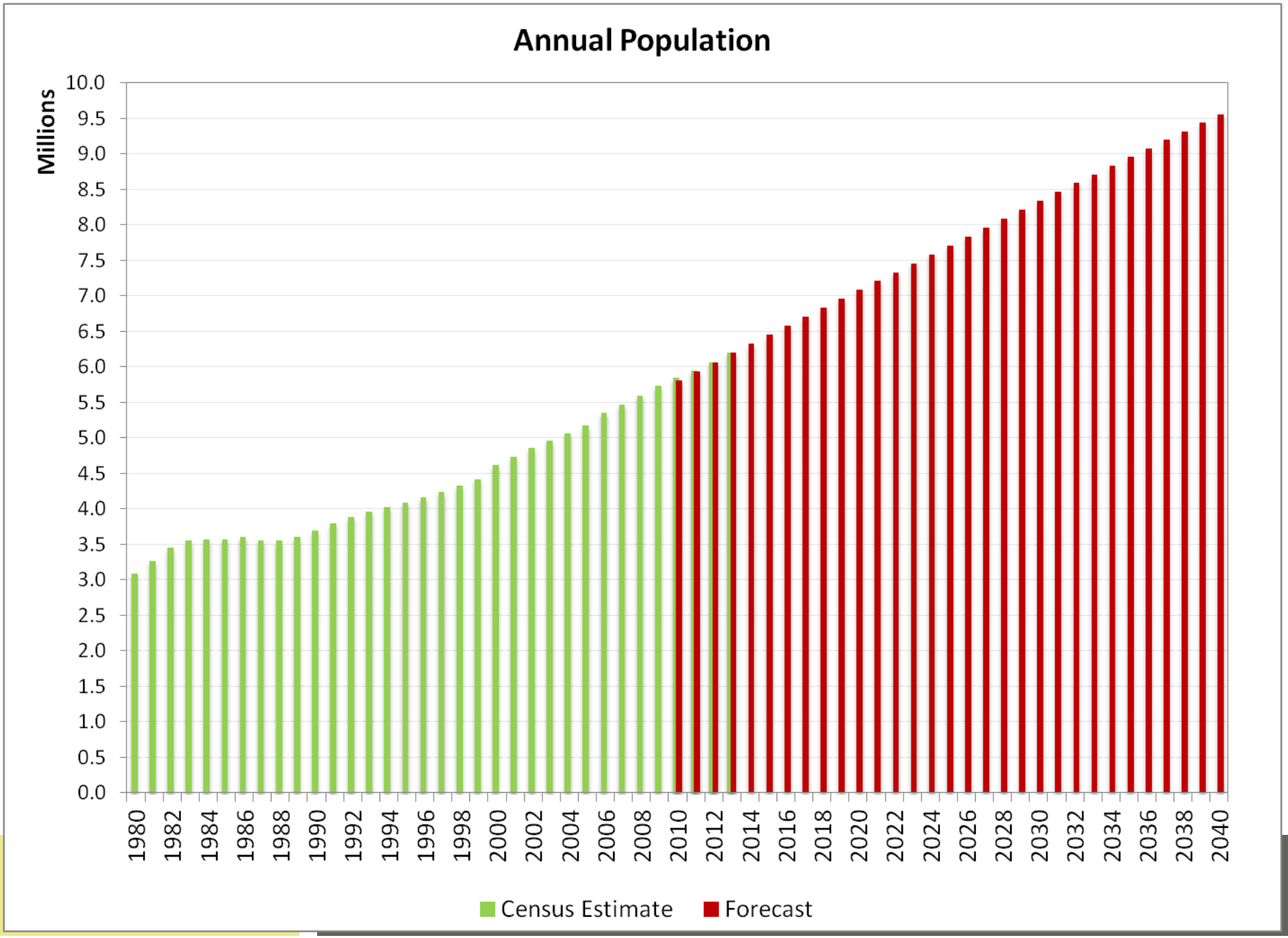
2034
2036
2038
2040
Census Estimate


Annual Population
Millions
10.0
9.5
9.0
8.5
8.0
7.5
7.0
6.5
6.0
5.5
5.0
4.5
4.0
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0.0
1980
1982
1984
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2004
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2012
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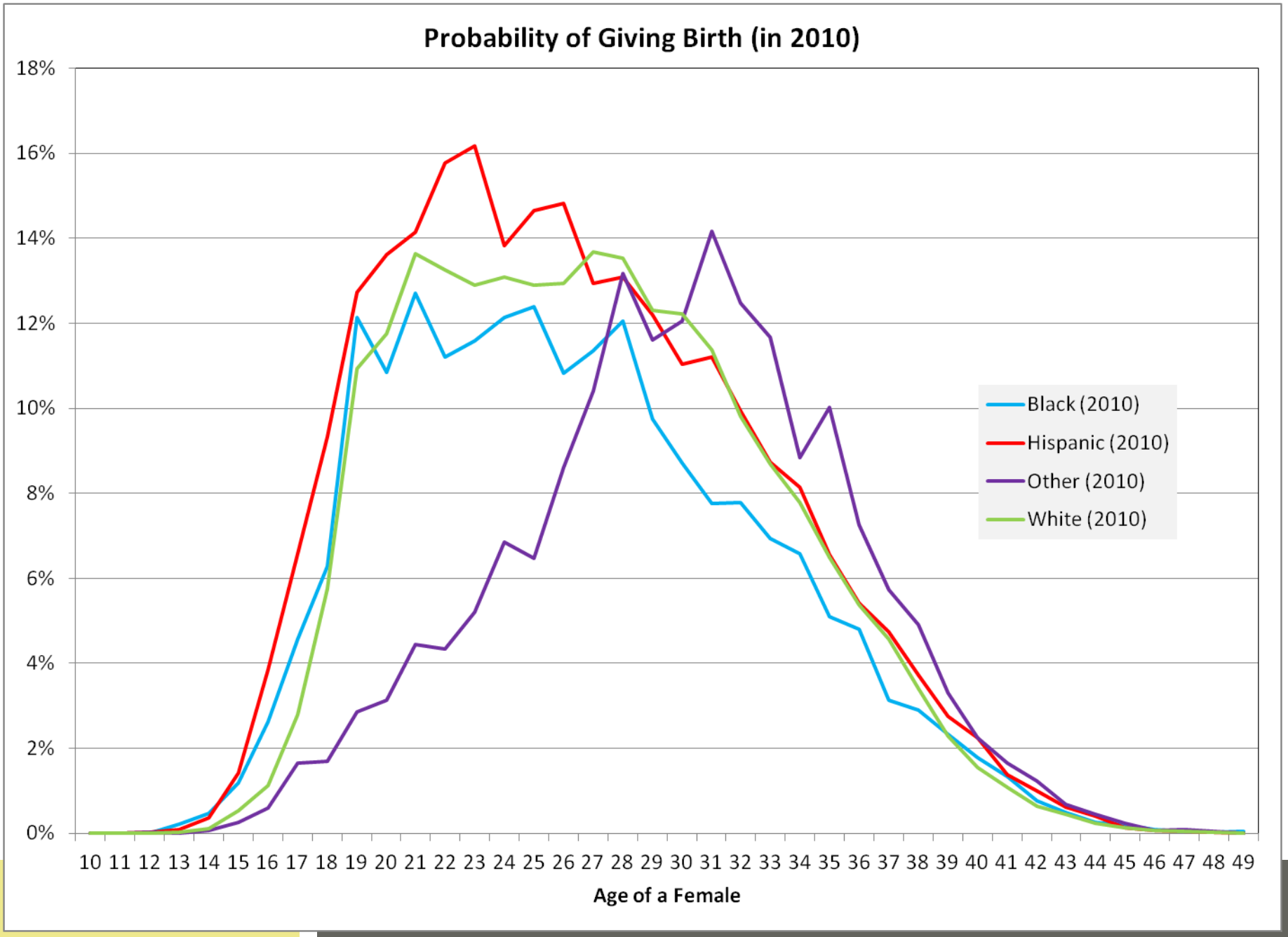
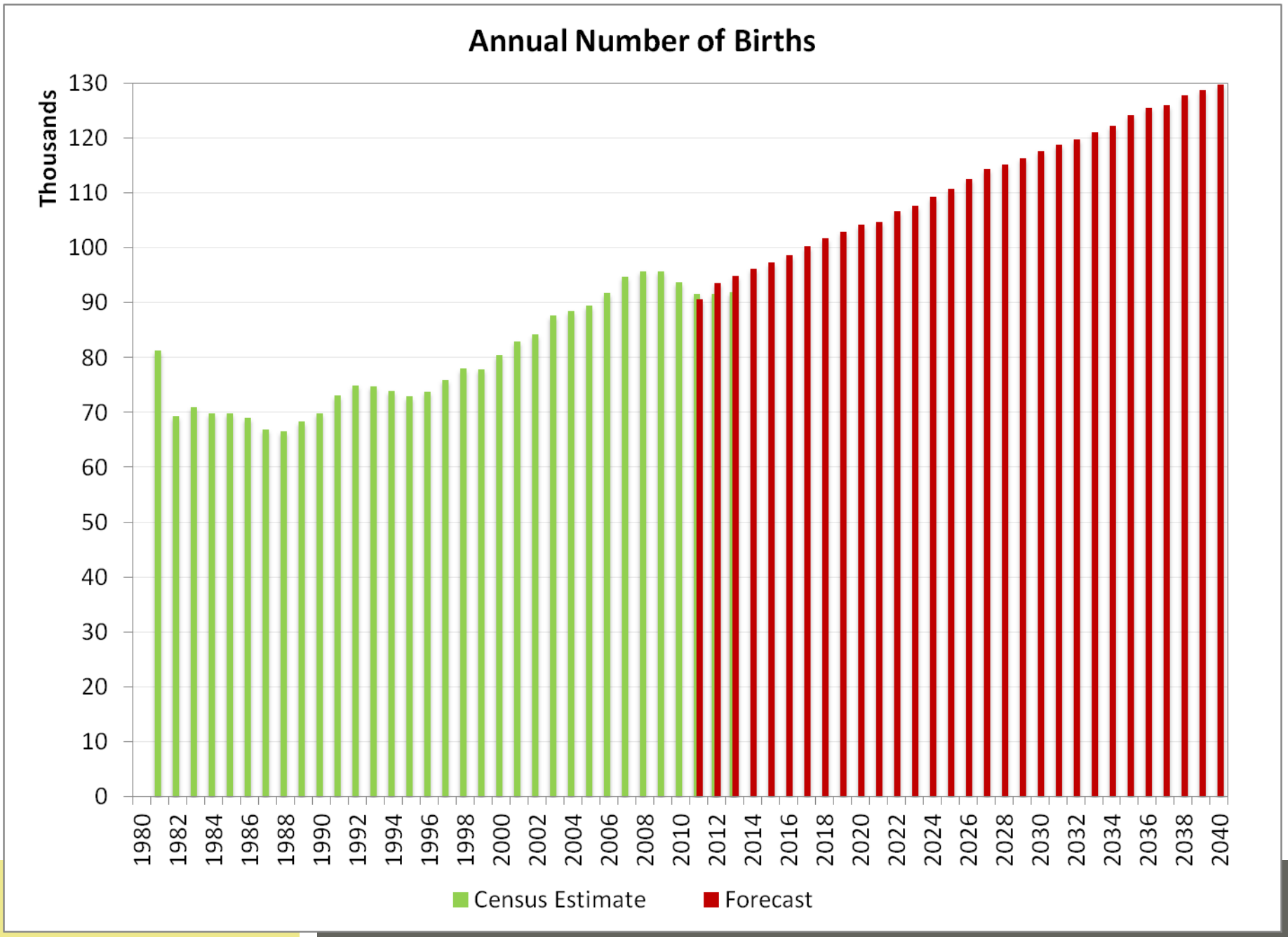
2016
2018
2020
2022
2024
2026
2028
2030
2032
2034
2036
2038
2040
Census Estimate
Forecast

Sources of Population Change

GAIN	LOSS
Births	Deaths
In-Migration	Out-Migration

- Stable trends in fertility and survival
- “Vital Statistics”


Probability of Giving Birth (in 2010)
18%
16%
14%
12%
10%
8%
6%
4%
2%
0%
10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49
Age of a Female
Black (2010)
Hispanic (2010)
Other (2010)
White (2010)


Annual Number of Births
Thousands
130
120
110
100
90
80
70
60
50
40
30
20
10
0
1980
1982
1984
1986
1988
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
2010
2012
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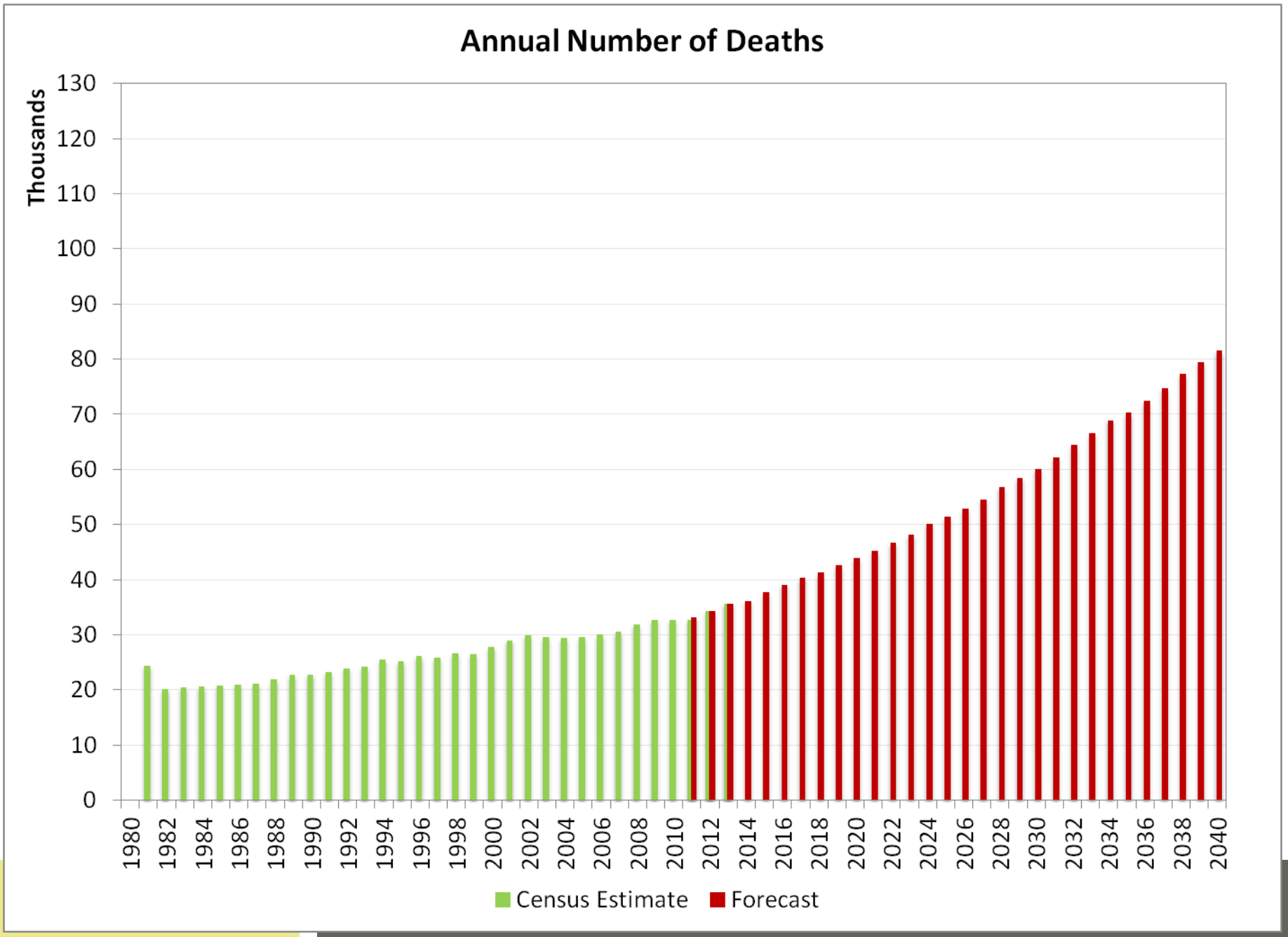
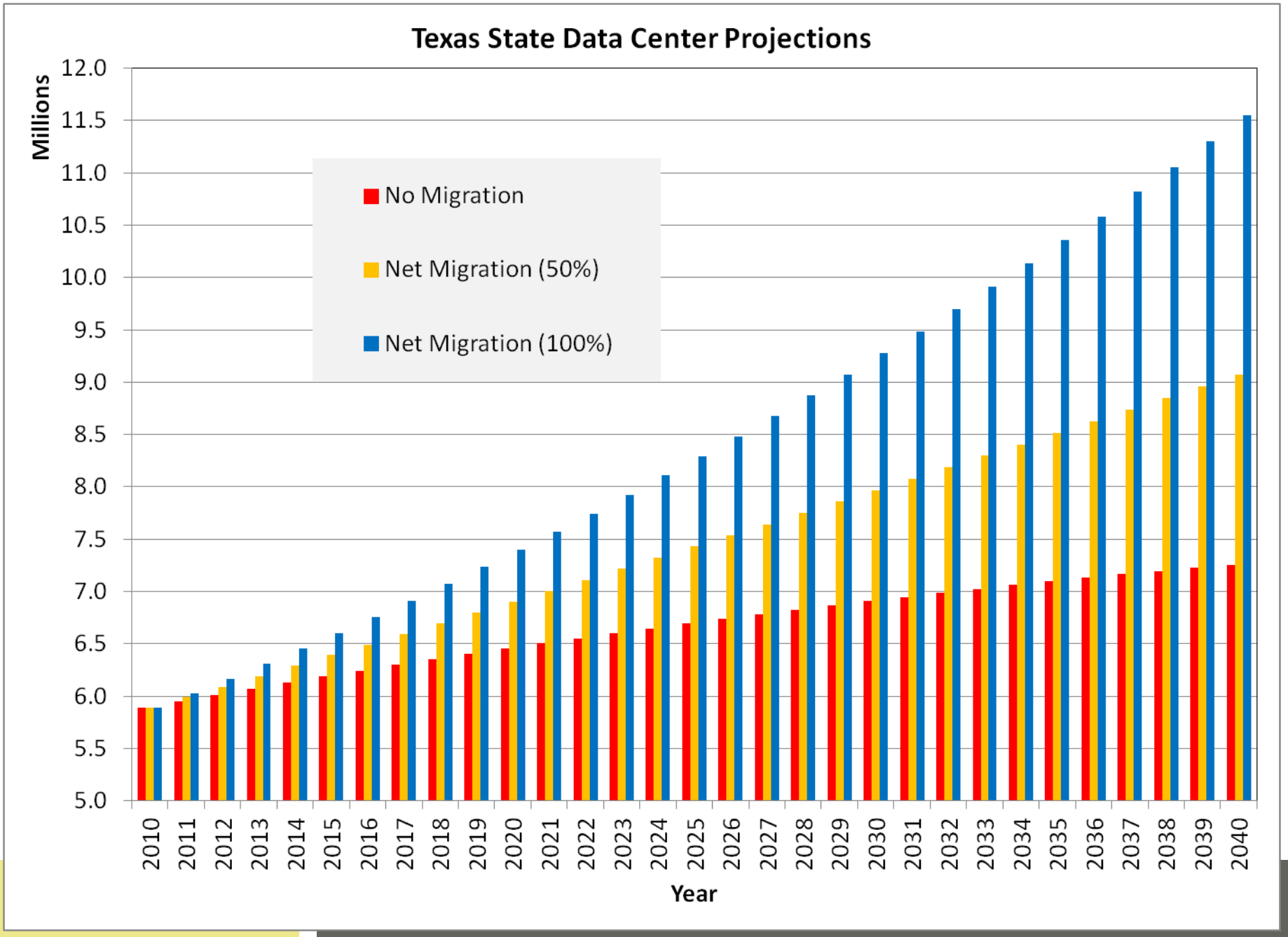
2040
Census Estimate
Forecast


Annual Number of Deaths
Thousands
130
120
110
100
90
80
70
60
50
40
30
20
10
0
1980
1982
1984
1986
1988
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
2010
2012
2014
2016
2018
2020
2022
2024
2026
2028
2030
2032
2034
2036
2038
2040
Census Estimate
Forecast

Migration

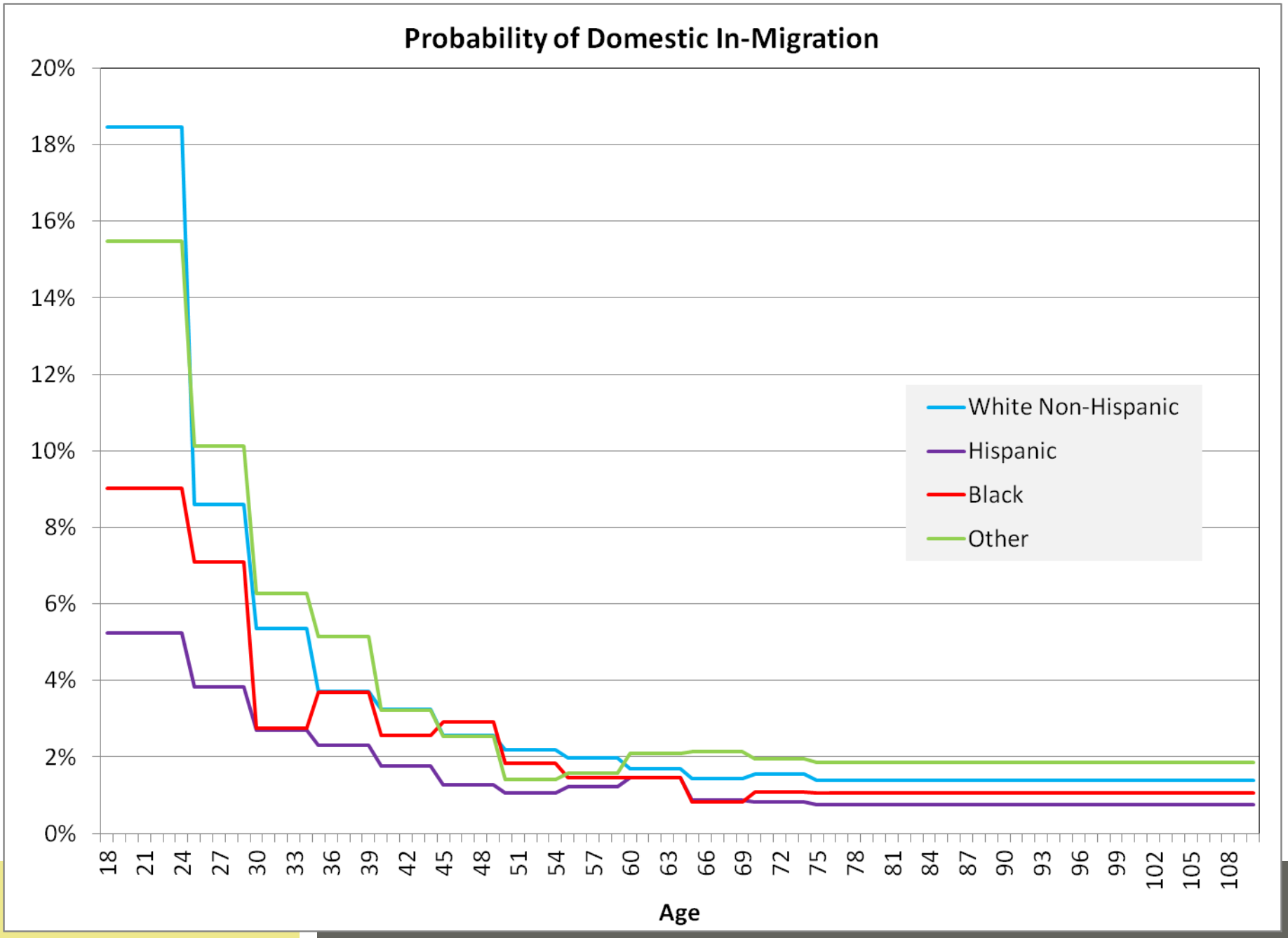
- More complicated:
  - cumulative
  - entirely social (no biological component)
  - can fluctuate
  - family/household is the fundamental unit
- Migration flows:
  - in-migration (+)
  - out-migration (-)
- Net migration: balance

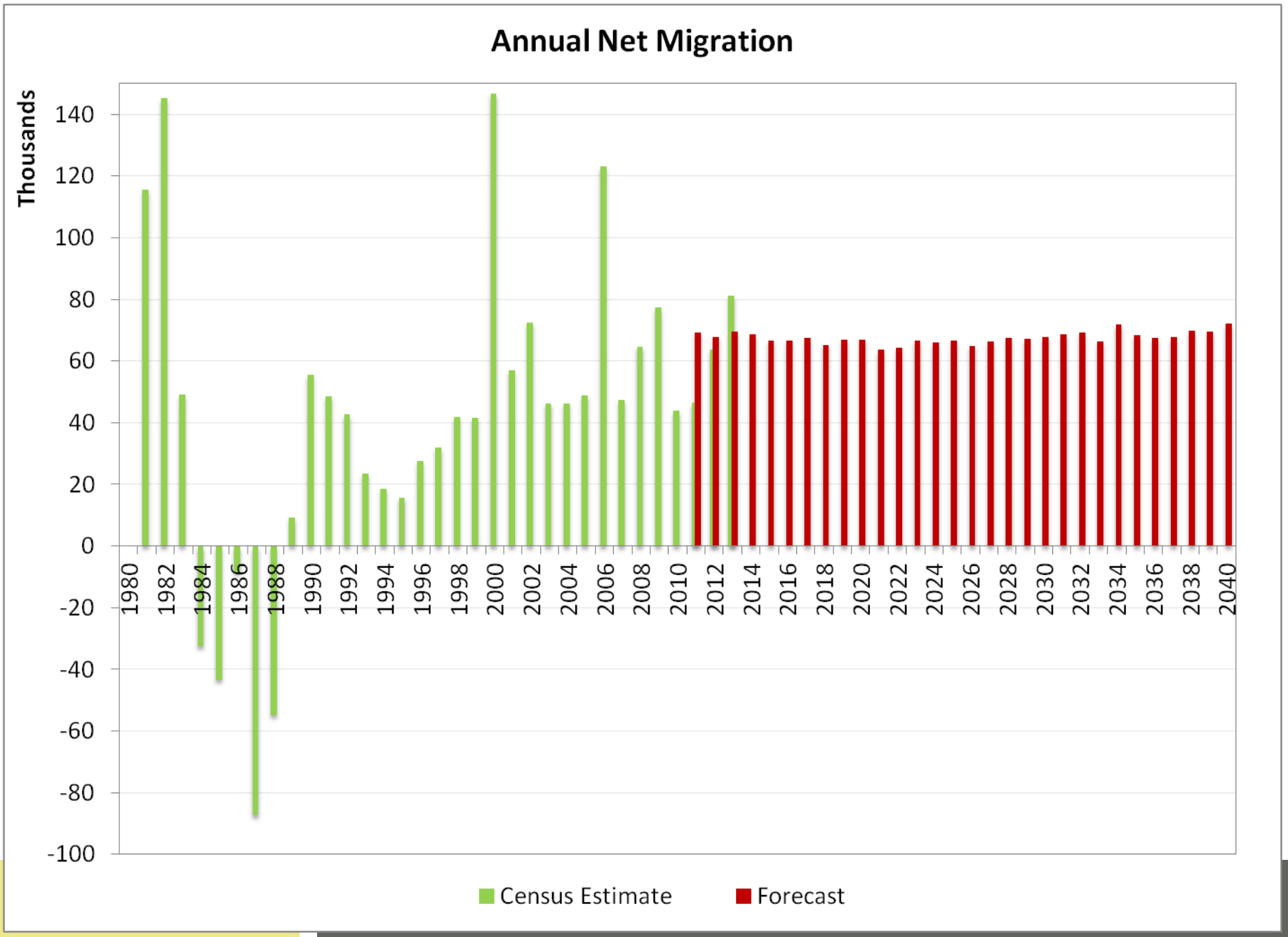

Texas State Data Center Projections
Millions
12.0
11.5
11.0
10.5
10.0
9.5
9.0
8.5
8.0
7.5
7.0
6.5
6.0
5.5
5.0
No Migration
Net Migration (50%)
Net Migration (100%)
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
2027
2028
2029
2030
2031
2032
2033
2034
2035
2036
2037
2038
2039
2040
Year

Annual Migration Flows for the H-GAC Region (in thousands)

Origin/Destination	IN-Migration	OUT-Migration	Net
Domestic	185	-170	15
Texas (non-H-GAC)	74	-88	-14
US	111	-82	29
International	49	n/a	49
All	234	-170	64

Source: ACS County to County Migration, 2007-2011


Probability of Domestic In-Migration
20%
18%
16%
14%
12%
10%
8%
6%
4%
2%
0%
18
21
24
27
30
33
36
39
42
45
48
51
54
57
60
63
66
69
72
75
78
81
84
87
90
93
96
99
102
105
108
Age
White Non-Hispanic
Hispanic
Black
Other


Annual Net Migration
Thousands
140
120
100
80
60
40
20
0
-20
-40
-60
-80
-100
1980
1982
1984
1986
1988
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
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2012
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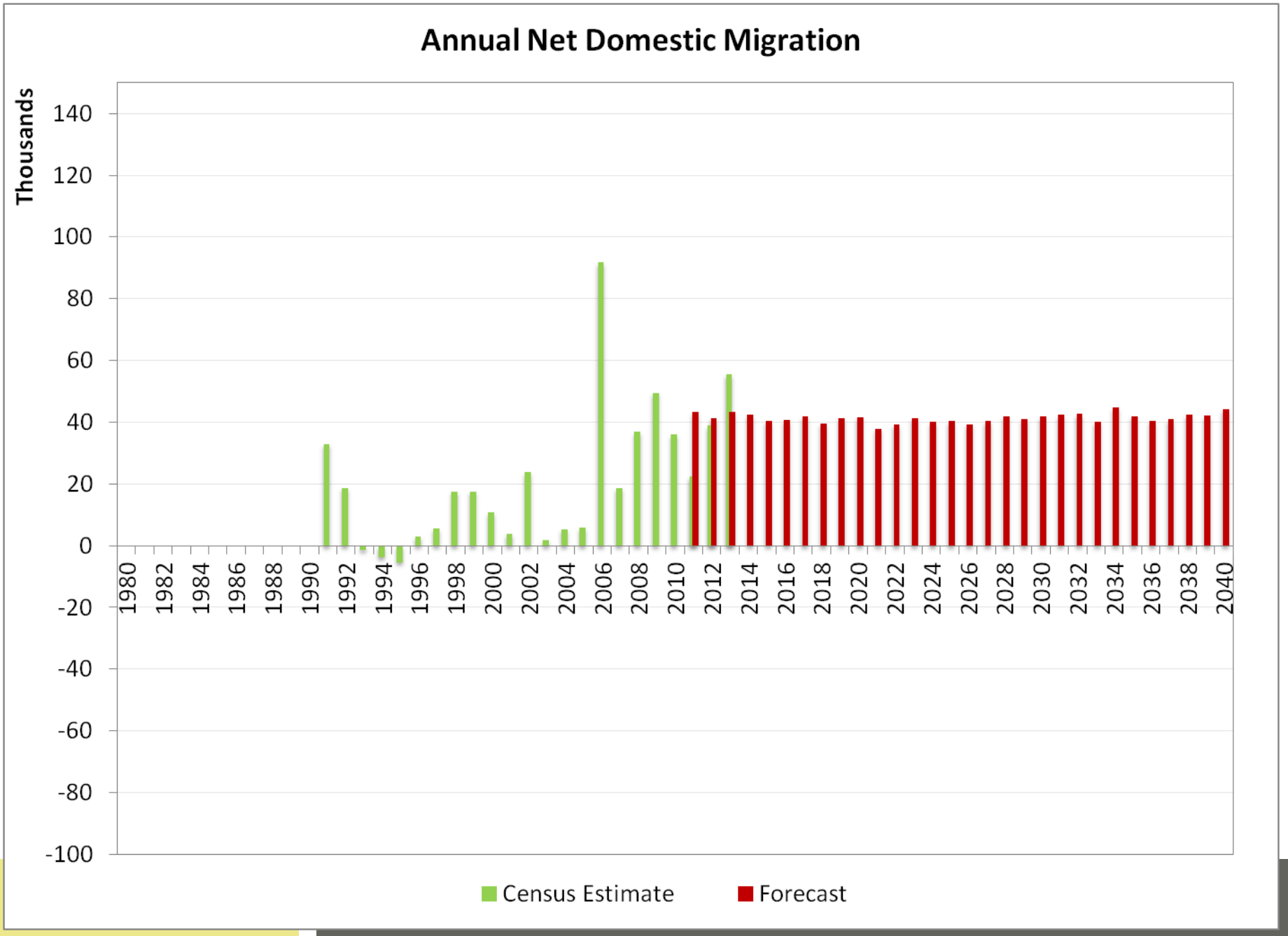
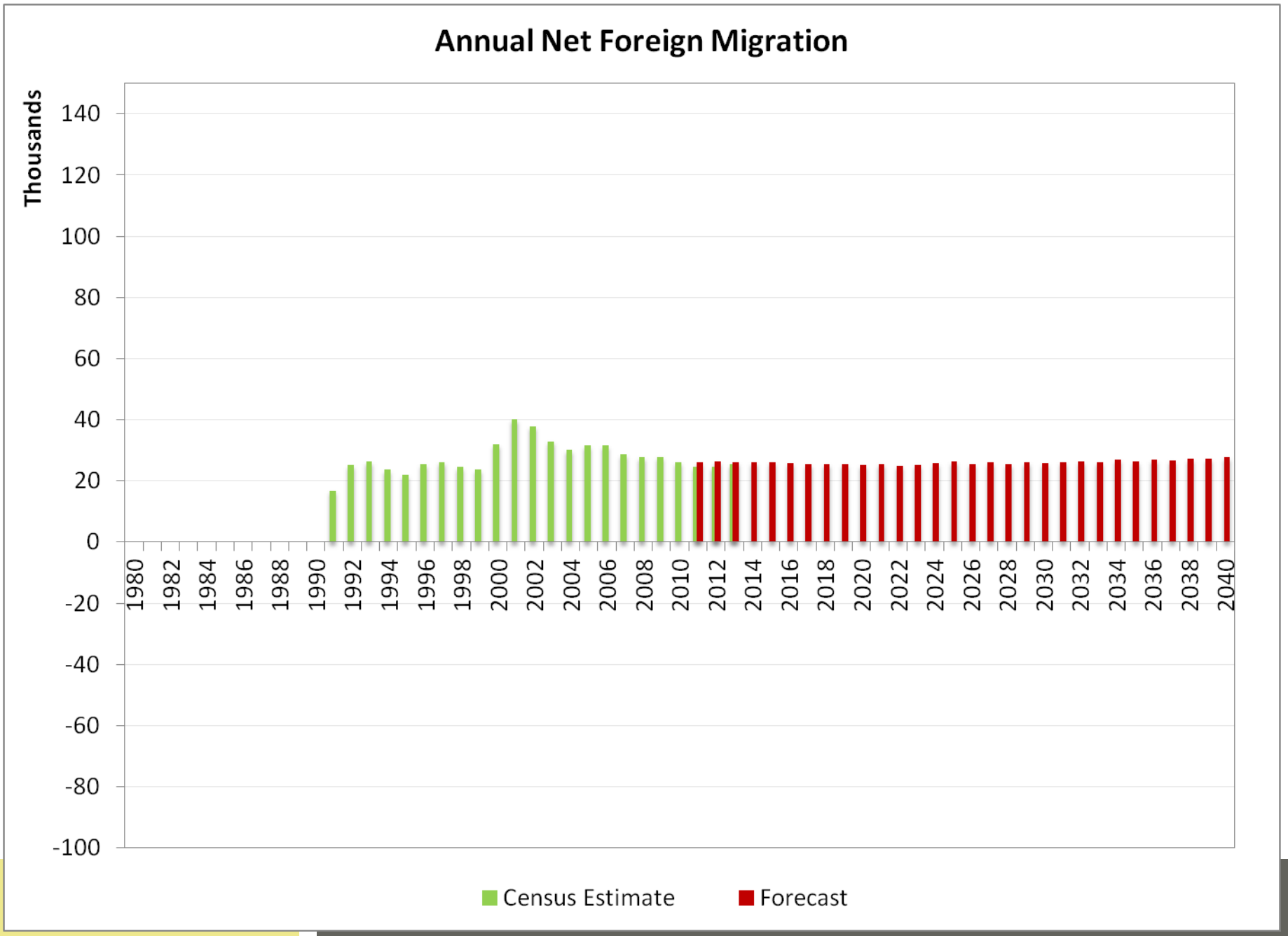
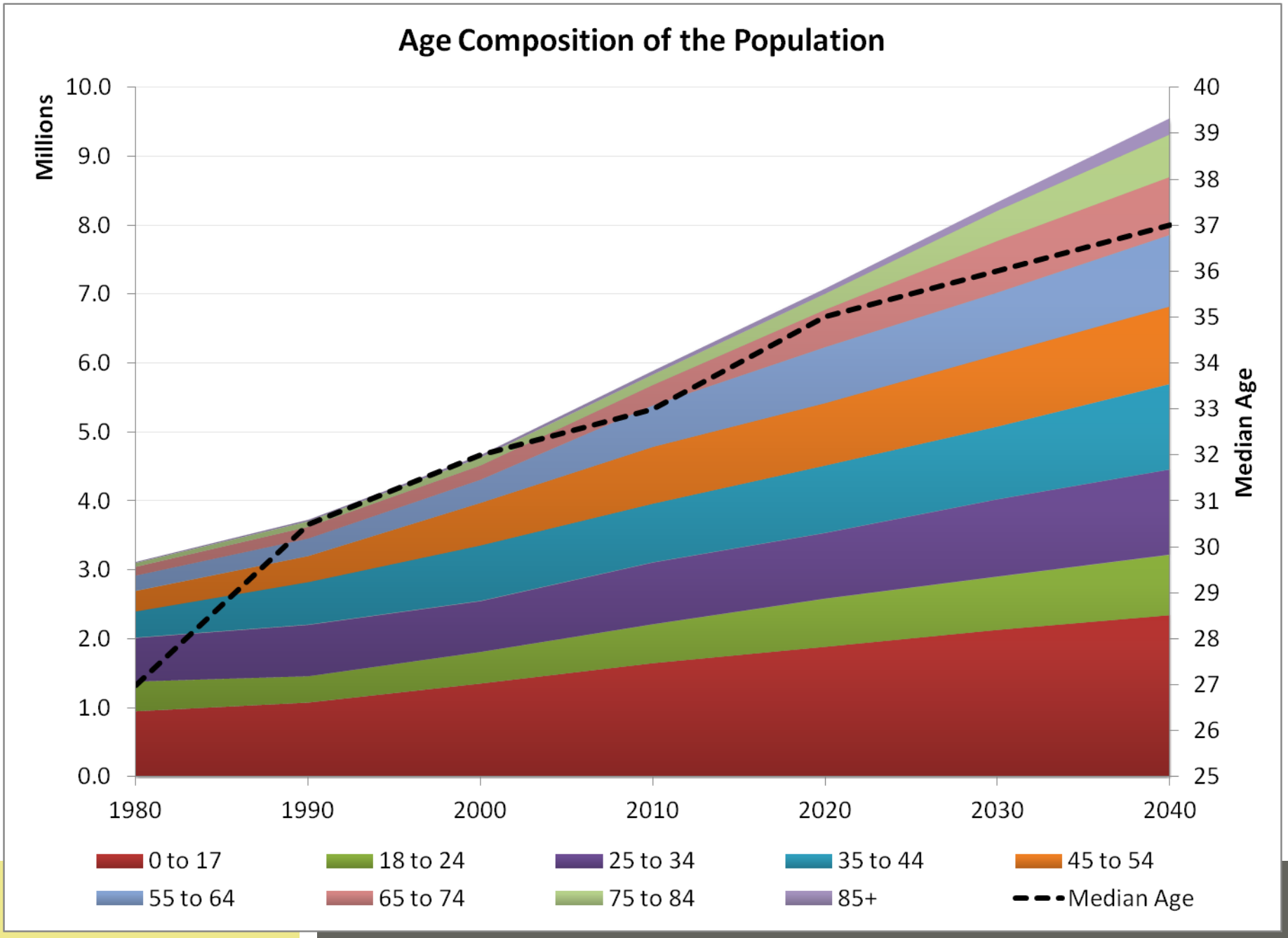
2030
2032
2034
2036
2038
2040
Census Estimate
Forecast

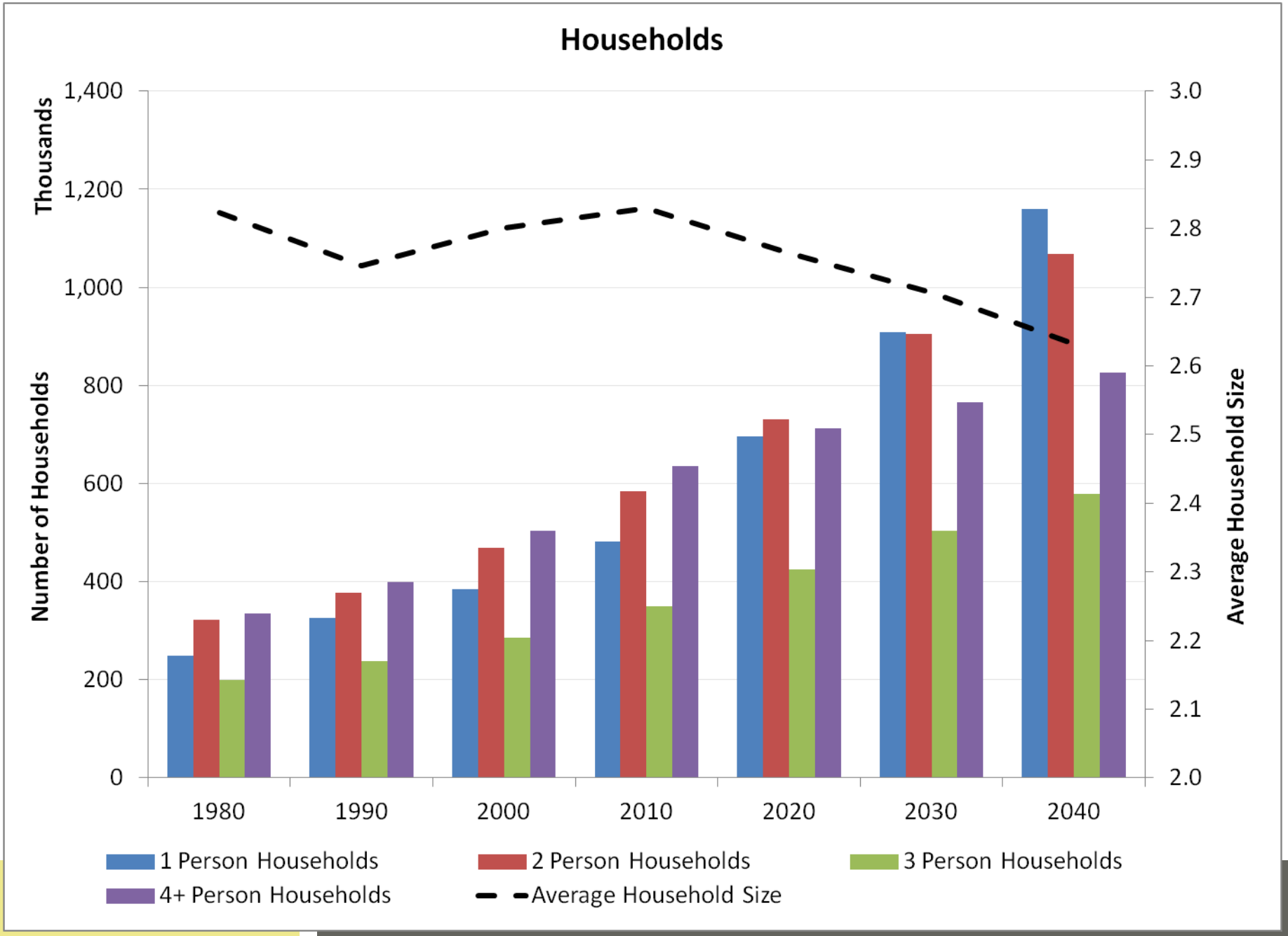

Annual Net Domestic Migration
Thousands
140
120
100
80
60
40
20
0
-20
-40
-60
-80
-100
1980
1982
1984
1986
1988
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
2010
2012
2014
2016
2018
2020
2022
2024
2026
2028
2030
2032
2034
2036
2038
2040
Census Estimate
Forecast


Annual Net Foreign Migration
Thousands
140
120
100
80
60
40
20
0
-20
-40
-60
-80
-100
1980
1982
1984
1986
1988
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
2010
2012
2014
2016
2018
2020
2022
2024
2026
2028
2030
2032
2034
2036
2038
2040
Census Estimate
Forecast

Demographic Micro Simulation

- Beyond Cohort-Component
- Computer micro simulation:
  - Biological events: aging, births, deaths
  - Migration events: moving in, moving out
  - Family events: marriage, divorce, child moving out of parents house
- Advantages
  - Household composition
  - Link to housing


Age Composition of the Population
Millions
10.0
9.0
8.0
7.0
6.0
5.0
4.0
3.0
2.0
1.0
0.0
40
39
38
37
36
35
34
33
32
31
30
29
28
27
26
25
Median Age
1980
1990
2000
2010
2020
2030
2040
0 to 17
18 to 24
25 to 34
35 to 44
45 to 54
55 to 64
65 to 74
75 to 84
85+
Median Age

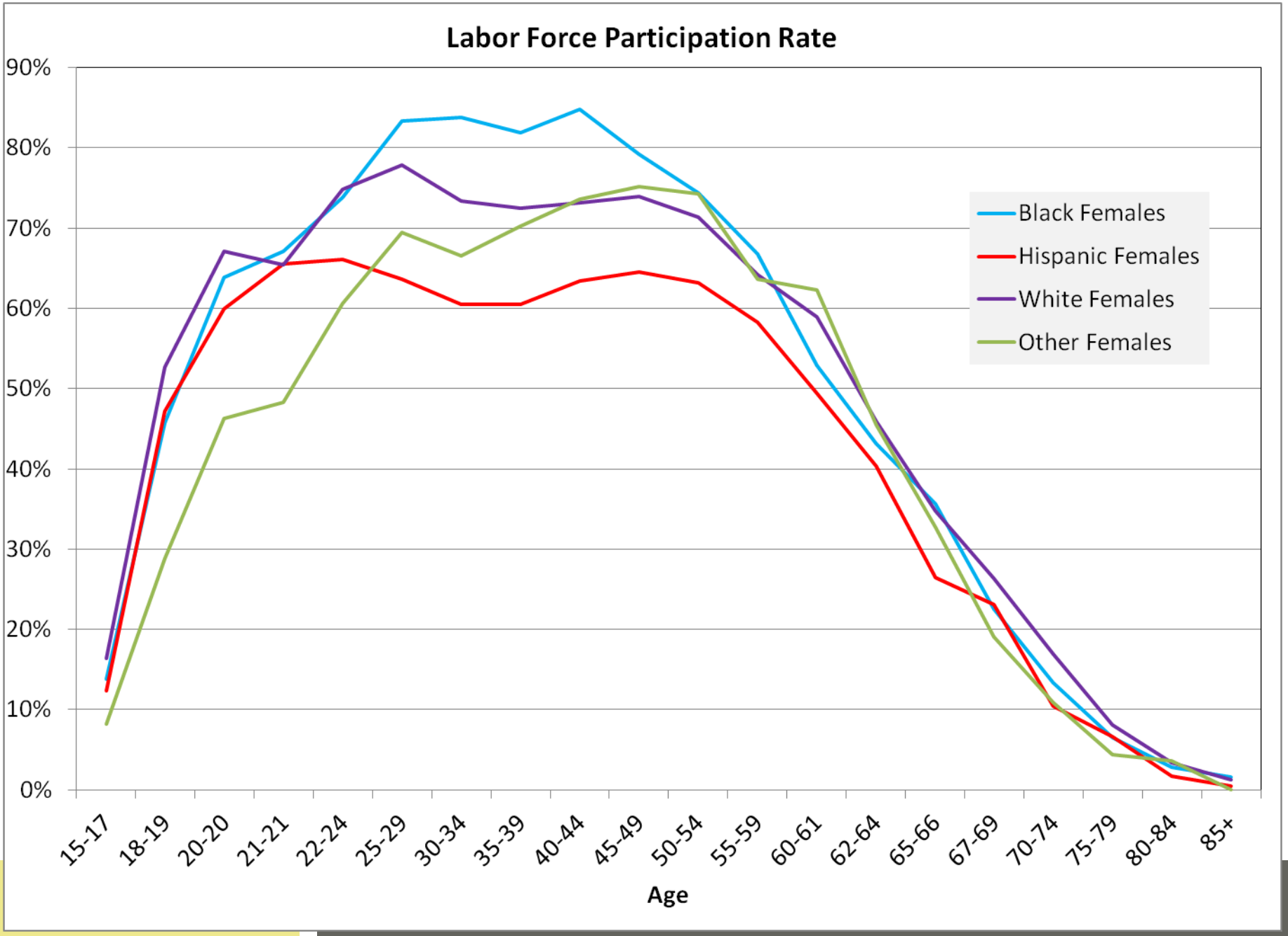

Households
Thousands
1,400
1,200
1,000
800
600
400
200
0
Number of Households
3.0
2.9
2.8
2.7
2.6
2.5
2.4
2.3
2.2
2.1
2.0
Average Household Size
1980
1990
2000
2010
2020
2030
2040
1 Person Households
2 Person Households
3 Person Households
4+ Person Households
Average Household Size

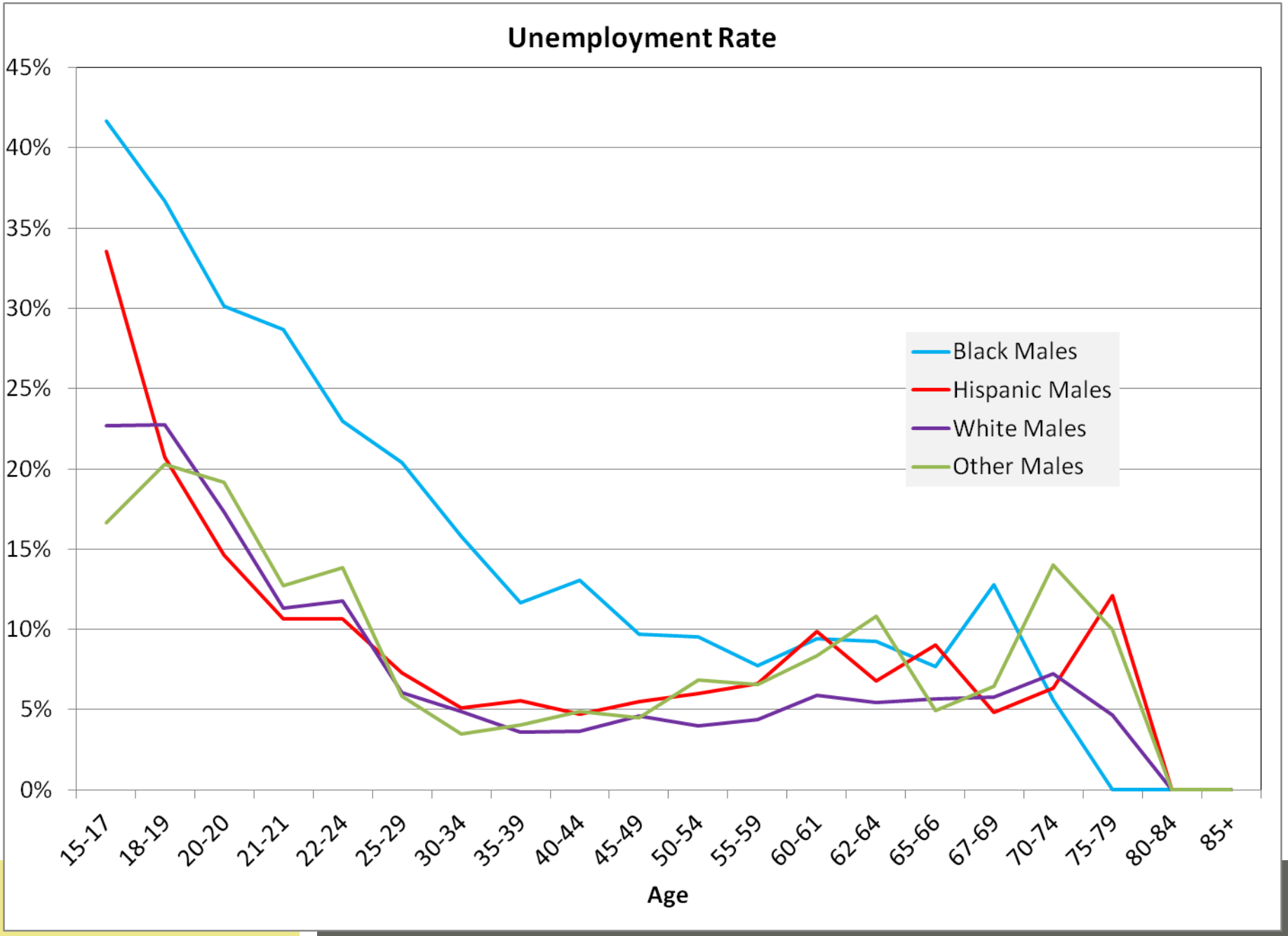
Population and Employment

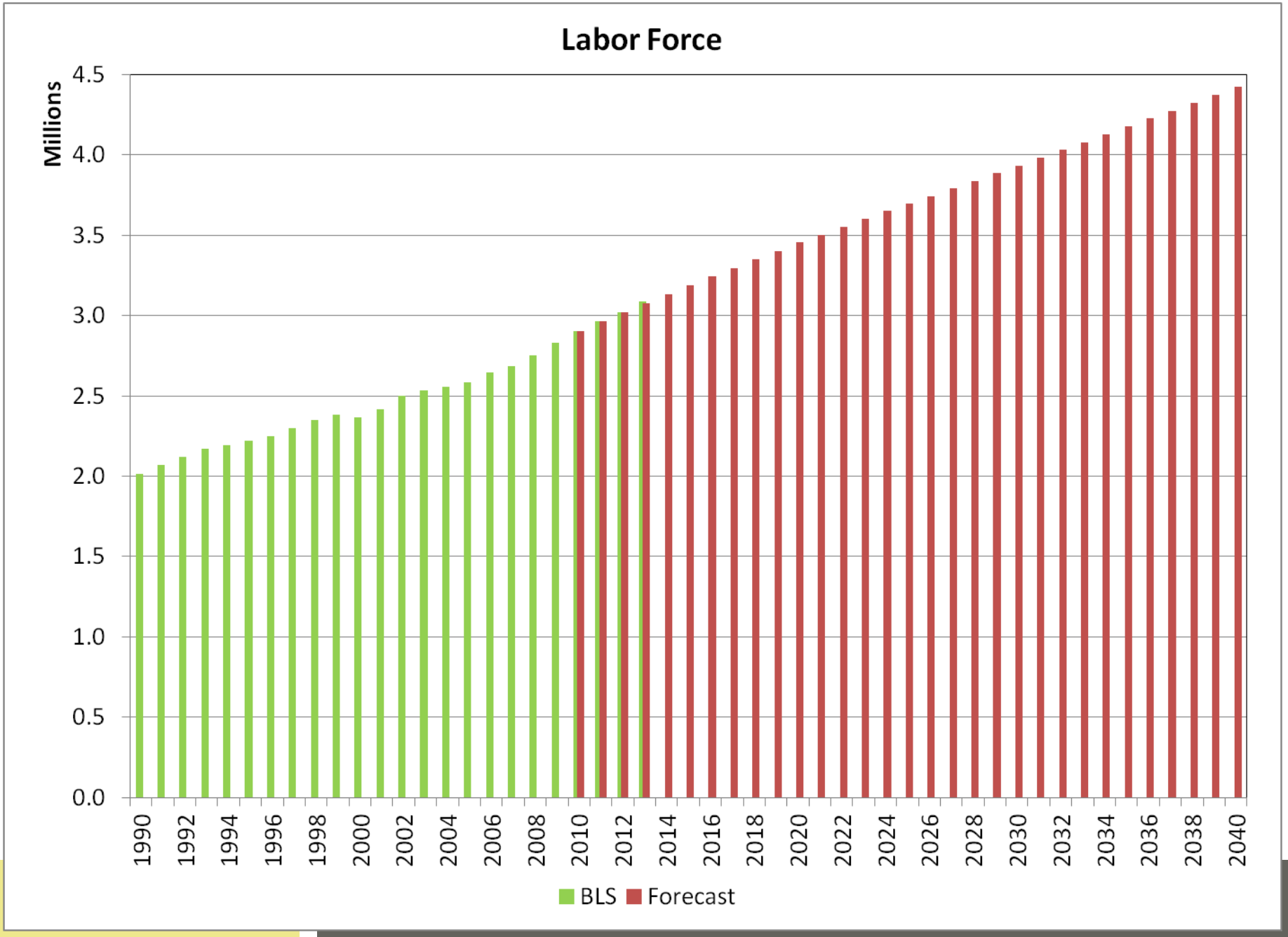
- Population → Labor Force

  Labor Force = Employed + Unemployed

- Labor Force Participation Rates
- Unemployment Rate
  - system-wide
  - demographically-specific


Labor Force Participation Rate
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Black Females
Hispanic Females
White Females
Other Females
15-17
18-19
20-20
21-21
22-24
25-29
30-34
35-39
40-44
45-49
50-54
55-59
60-61
62-64
65-66
67-69
70-74
75-79
80-84
85+
Age


Unemployment Rate
45%
40%
35%
30%
25%
20%
15%
10%
5%
0%
Black Males
Hispanic Males
White Males
Other Males
15-17
18-19
20-20
21-21
22-24
25-29
30-34
35-39
40-44
45-49
50-54
55-59
60-61
62-64
65-66
67-69
70-74
75-79
80-84
85+
Age


Labor Force
Millions
4.5
4.0
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0.0
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
2010
2012
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2022
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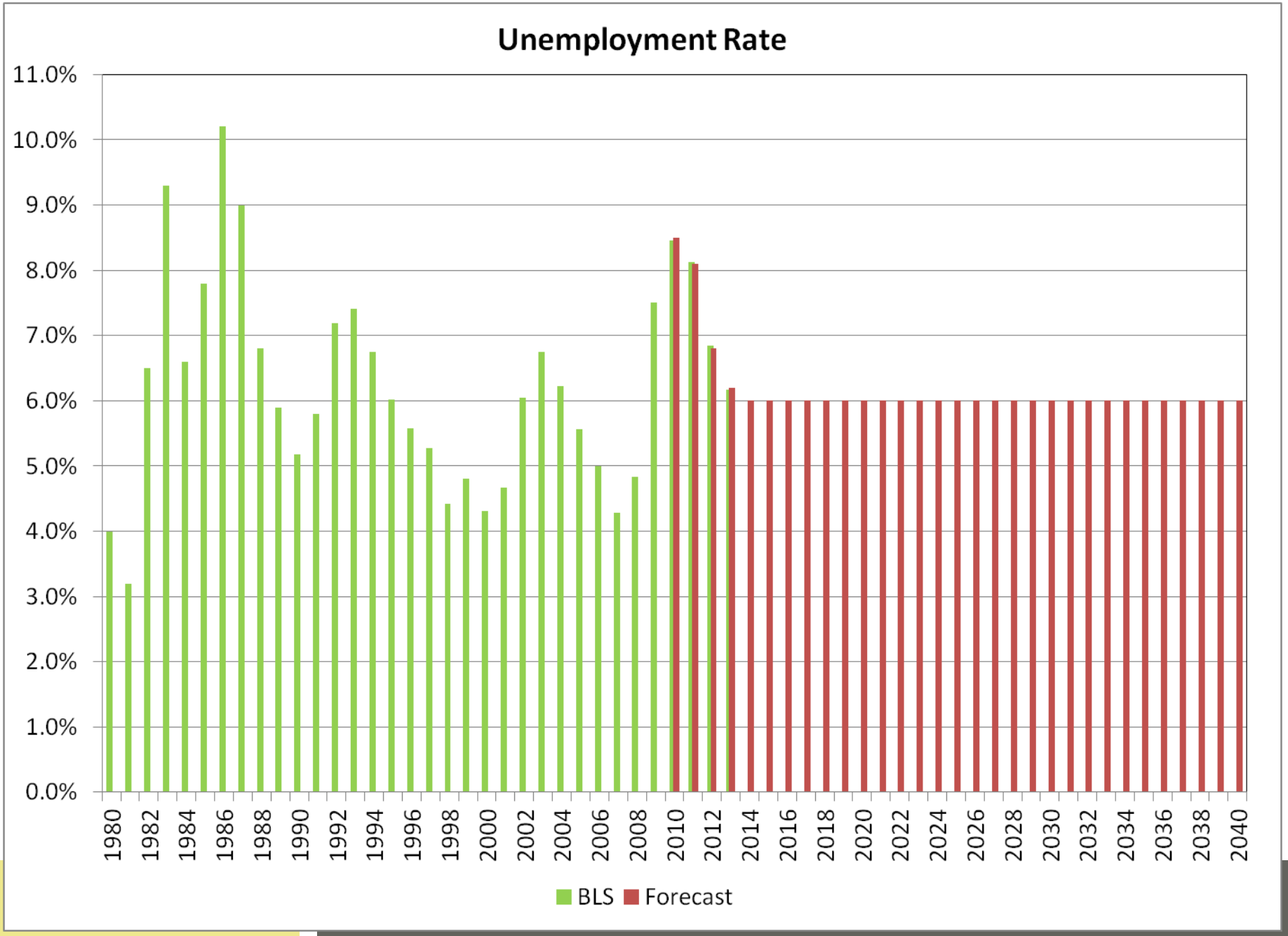
2032
2034
2036
2038
2040
BLS
Forecast


Unemployment Rate
11.0%
10.0%
9.0%
8.0%
7.0%
6.0%
5.0%
4.0%
3.0%
2.0%
1.0%
0.0%
1980
1982
1984
1986
1988
1990
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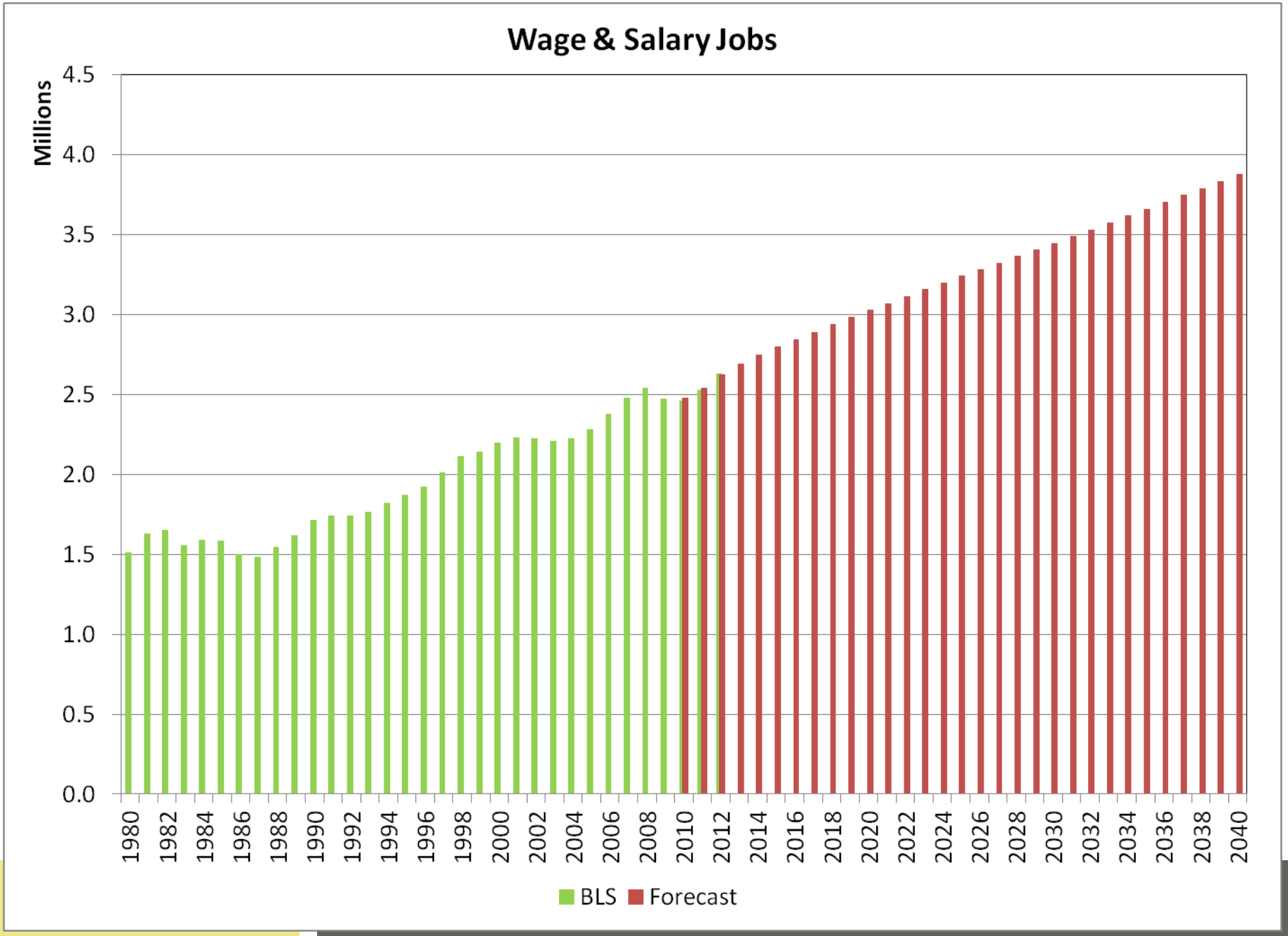
BLS
Forecast


Wage & Salary Jobs
Millions
4.5
4.0
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0.0
1980
1982
1984
1986
1988
1990
1992
1994
1996
1998
2000
2002
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2006
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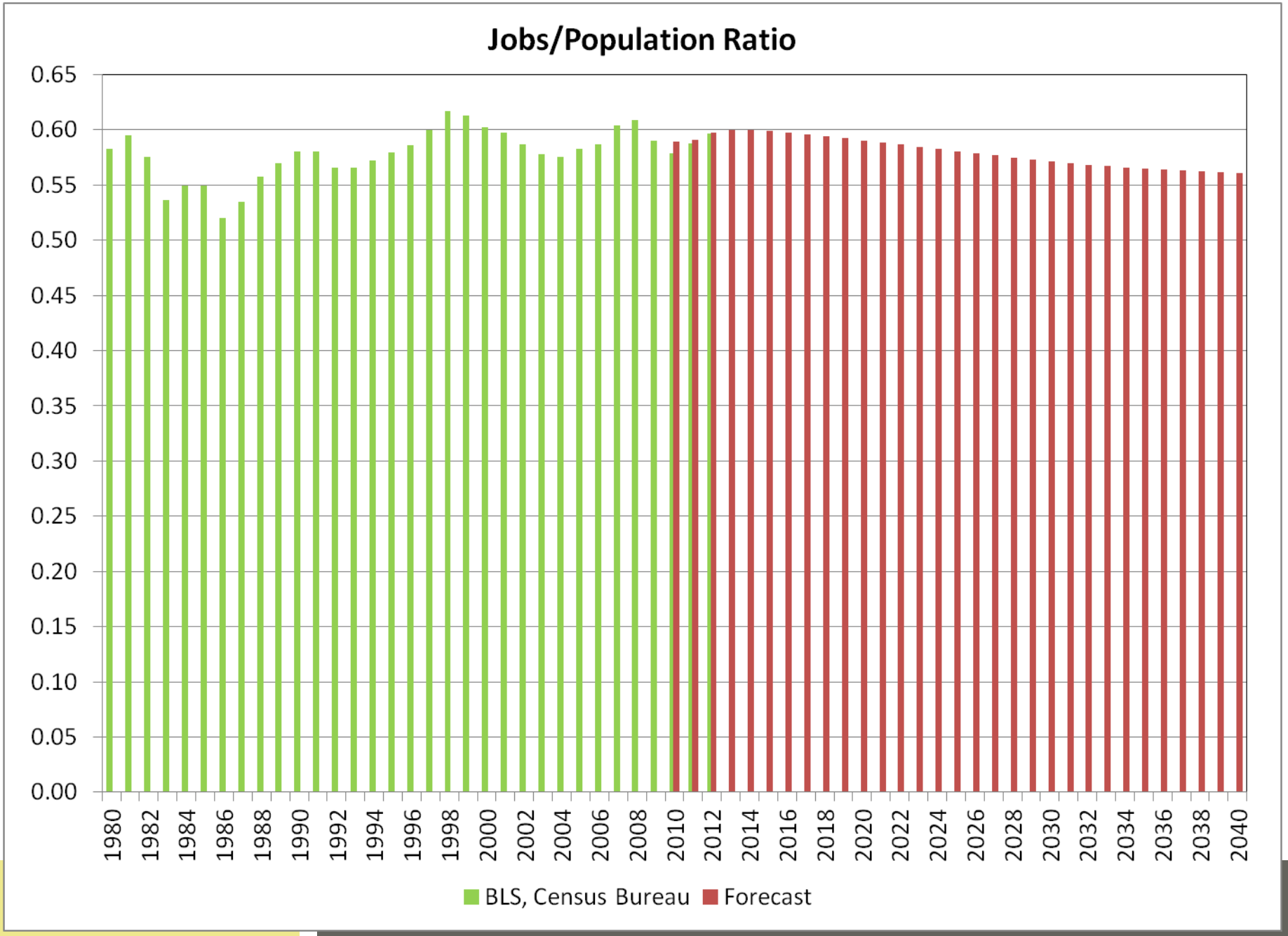
2038
2040
BLS
Forecast

Assumptions and Scenarios


Jobs/Population Ratio
0.65
0.60
0.55
0.50
0.45
0.40
0.35
0.30
0.25
0.20
0.15
0.10
0.05
0.00
1980
1982
1984
1986
1988
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
2010
2012
2014
2016
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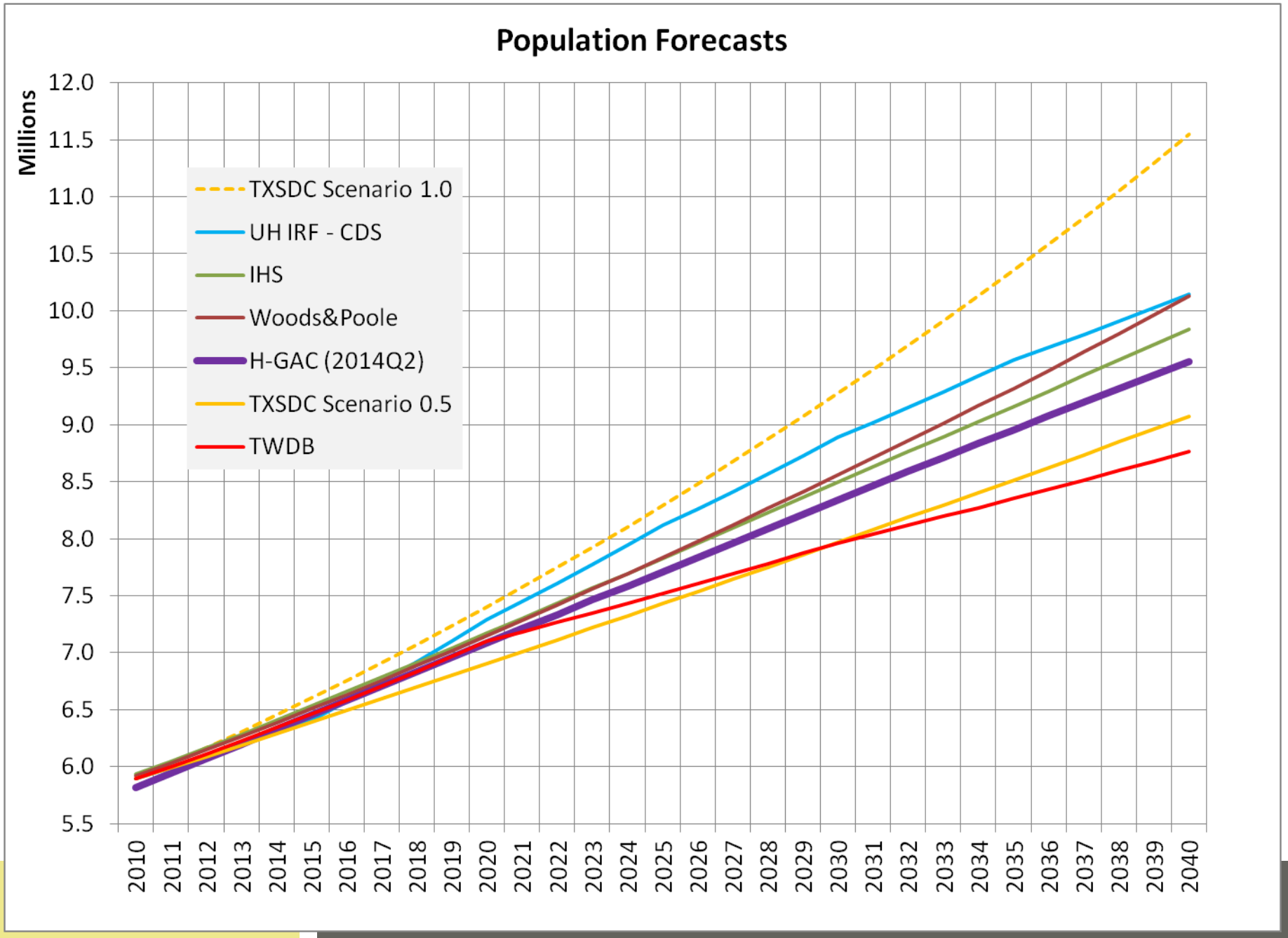
2038
2040
BLS, Census Bureau
Forecast


Population Forecasts
Millions
12.0
11.5
11.0
10.5
10.0
9.5
9.0
8.5
8.0
7.5
7.0
6.5
6.0
5.5
TXSDC Scenario 1.0
UH IRF - CDS
IHS
Woods&Poole
H-GAC (2014Q2)
TXSDC Scenario 0.5
TWDB
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
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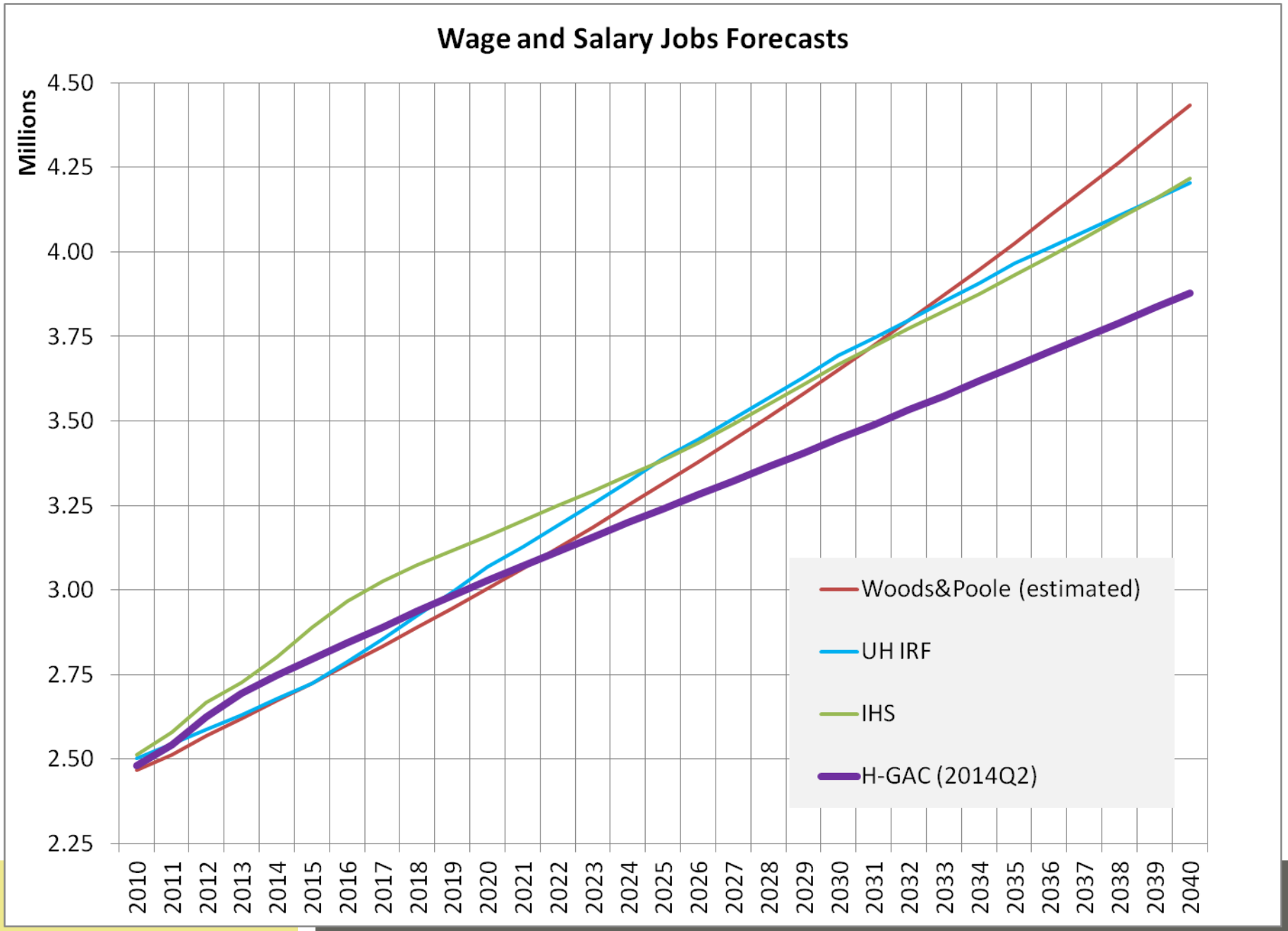
2040


Wage and Salary Jobs Forecasts
Millions
4.50
4.25
4.00
3.75
3.50
3.25
3.00
2.75
2.50
2.25
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
2027
2028
2029
2030
2031
2032
2033
2034
2035
2036
2037
2038
2039
2040
Woods&Poole (estimated)
UH IRF
IHS
H-GAC (2014Q2)

Summary

	Million People	Million Jobs (Wage & Salary)
2010	5.8 (+1.2)	2.5 (+0.3)
2020	7.1 (+1.3)	3.0 (+0.5)
2030	8.3 (+1.2)	3.5 (+0.5)
2040	9.6 (+1.3)	3.9 (+0.4)

Population and Employment Forecast

- Demographic dynamics
- Frequent updates (ACS, BLS, BEA, TWC)
- Population / Workforce balance
- Demand proxies for
  - ***Housing***
  - ***Non-residential space***

spotlight on the

REGIONAL GROWTH FORECAST

?

www.h-gac.com/forecast

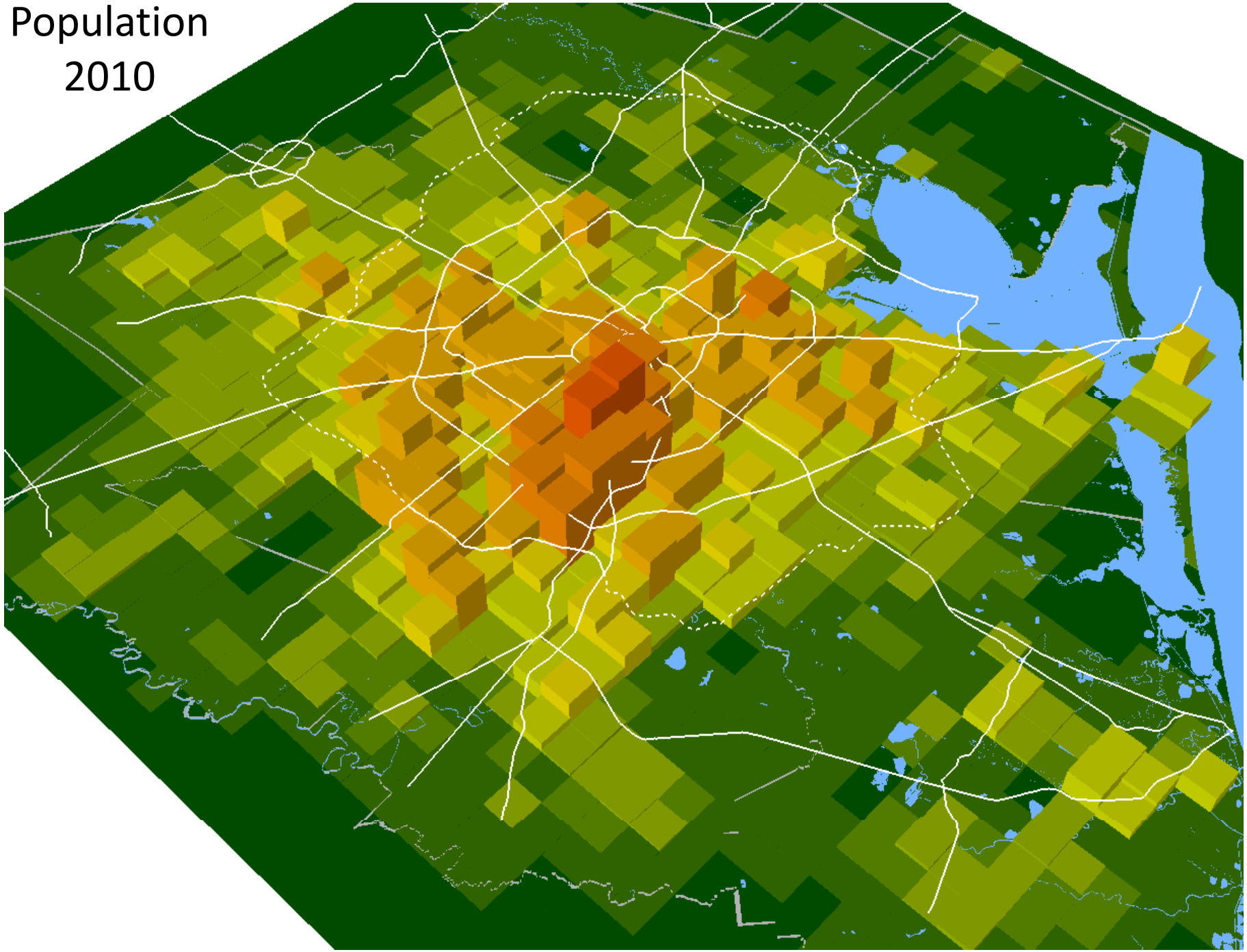
forecast@h-gac.com

spotlight on the REGIONAL GROWTH FORECAST

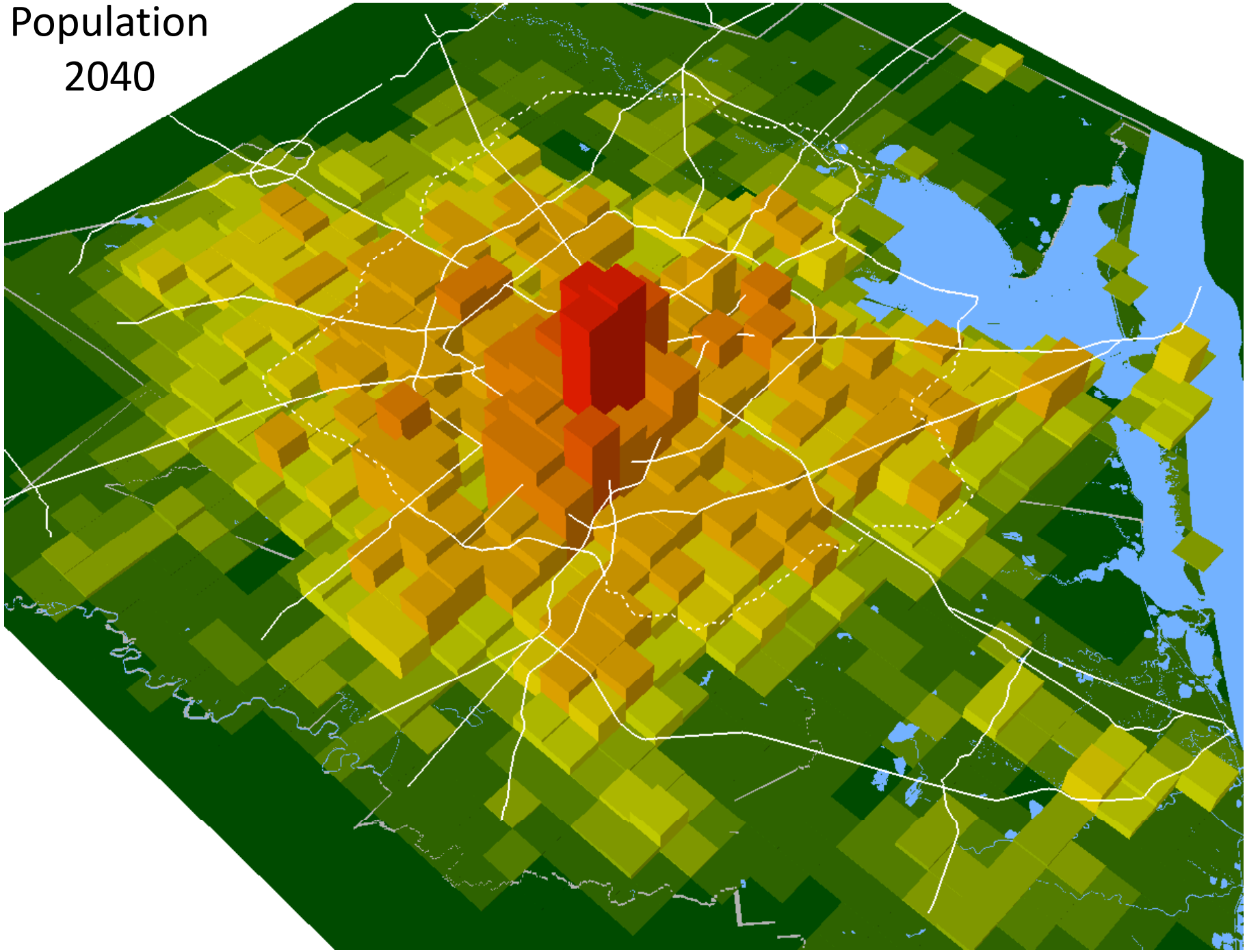
Friday, August 1, 2014

Houston-Galveston Area Council

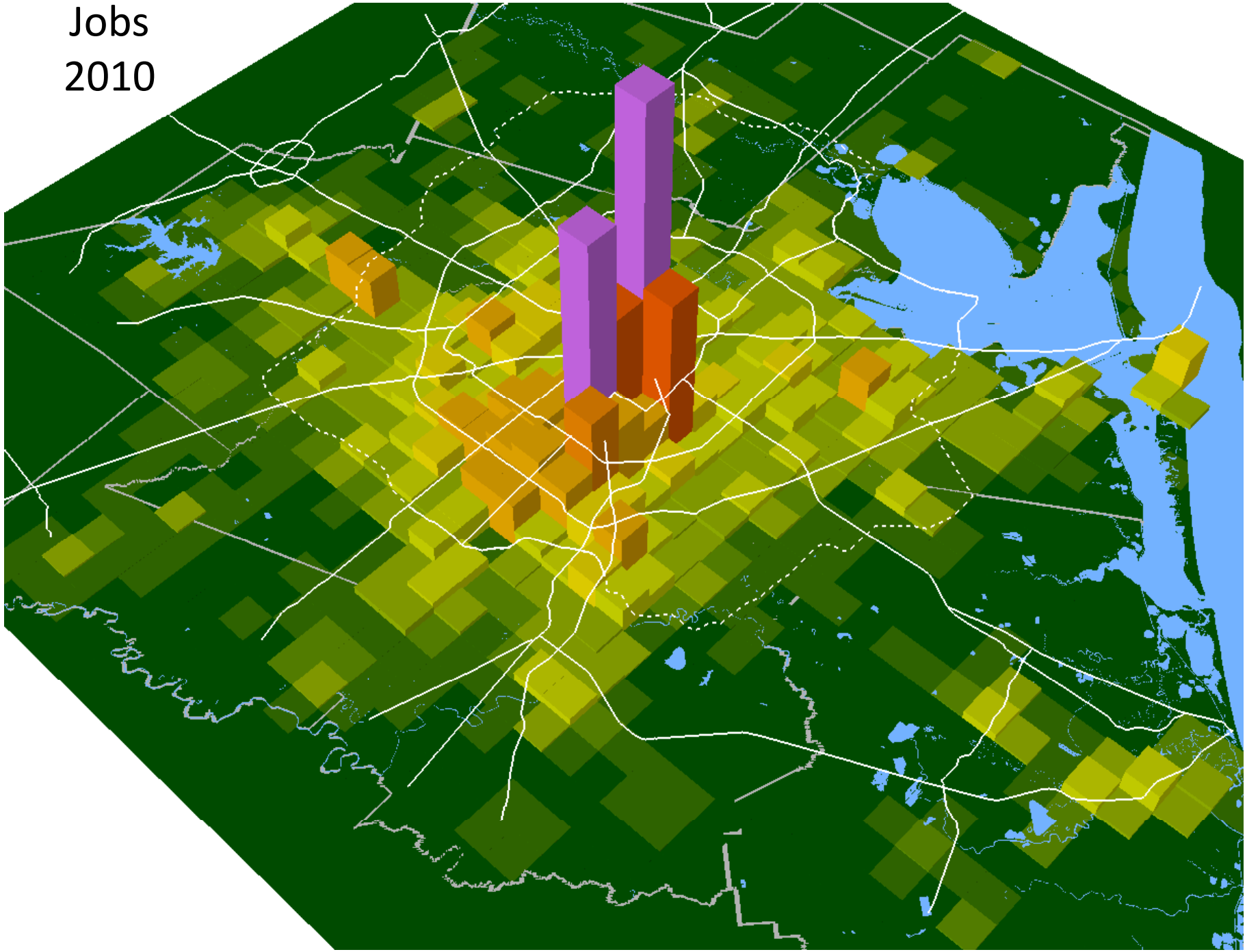
Population
2010



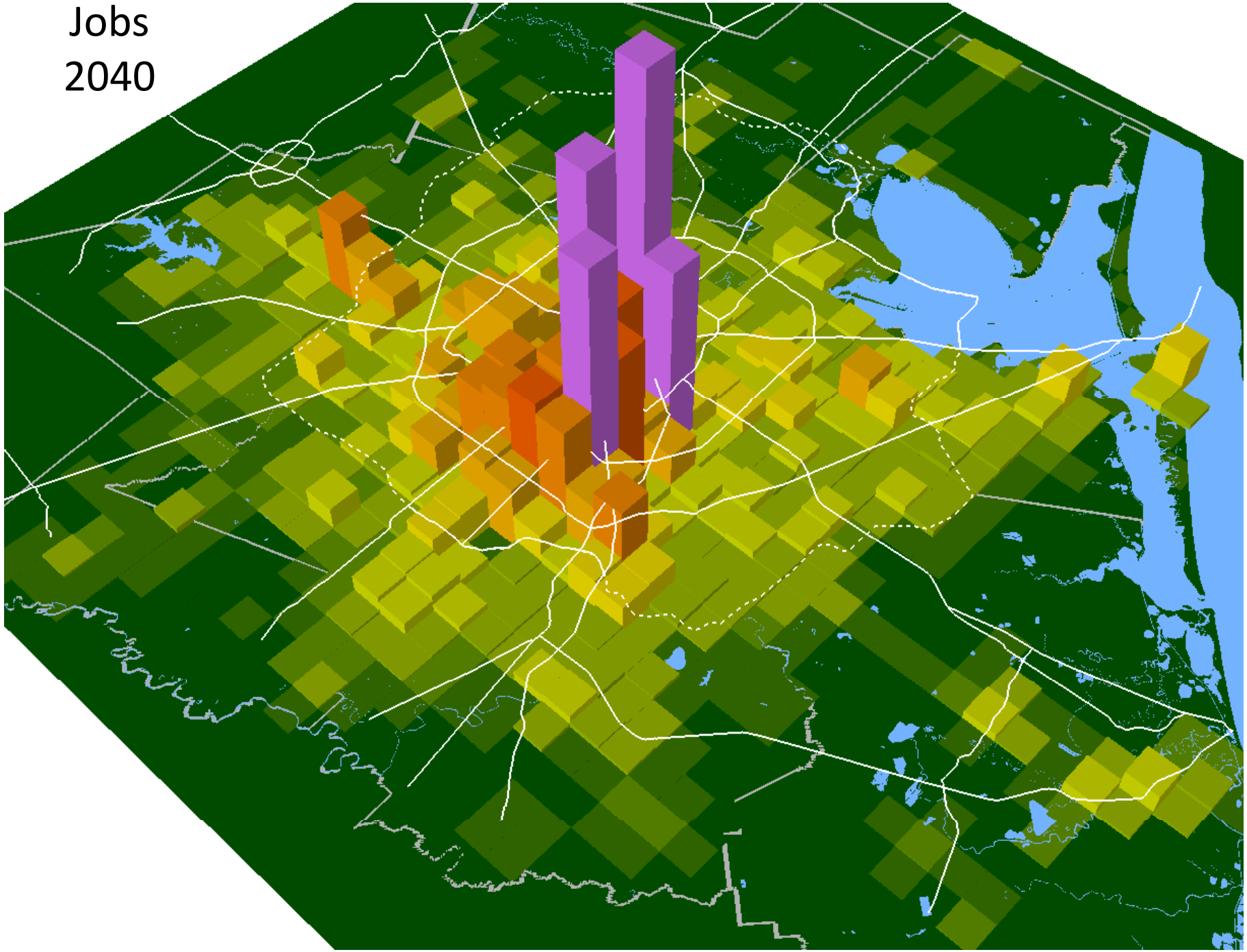
Population
2040



Jobs
2010



Jobs
2040



Part II: Land Use Forecast

What is "Regional Growth"?

- More people, more jobs
- More buildings
- Geography of population and employment = Geography of buildings
- "Land Use" (small area)
  - Structure: Buildings and Parcels
  - Activity: People and Jobs

New Approaches in Land Use Forecasting

- Real Estate Development
- Computer Simulation
- Disaggregate analysis
  - individual parcels
- "Virtual Experiment"
  - setting initial conditions
  - defining rules
  - observing the outcomes

Components

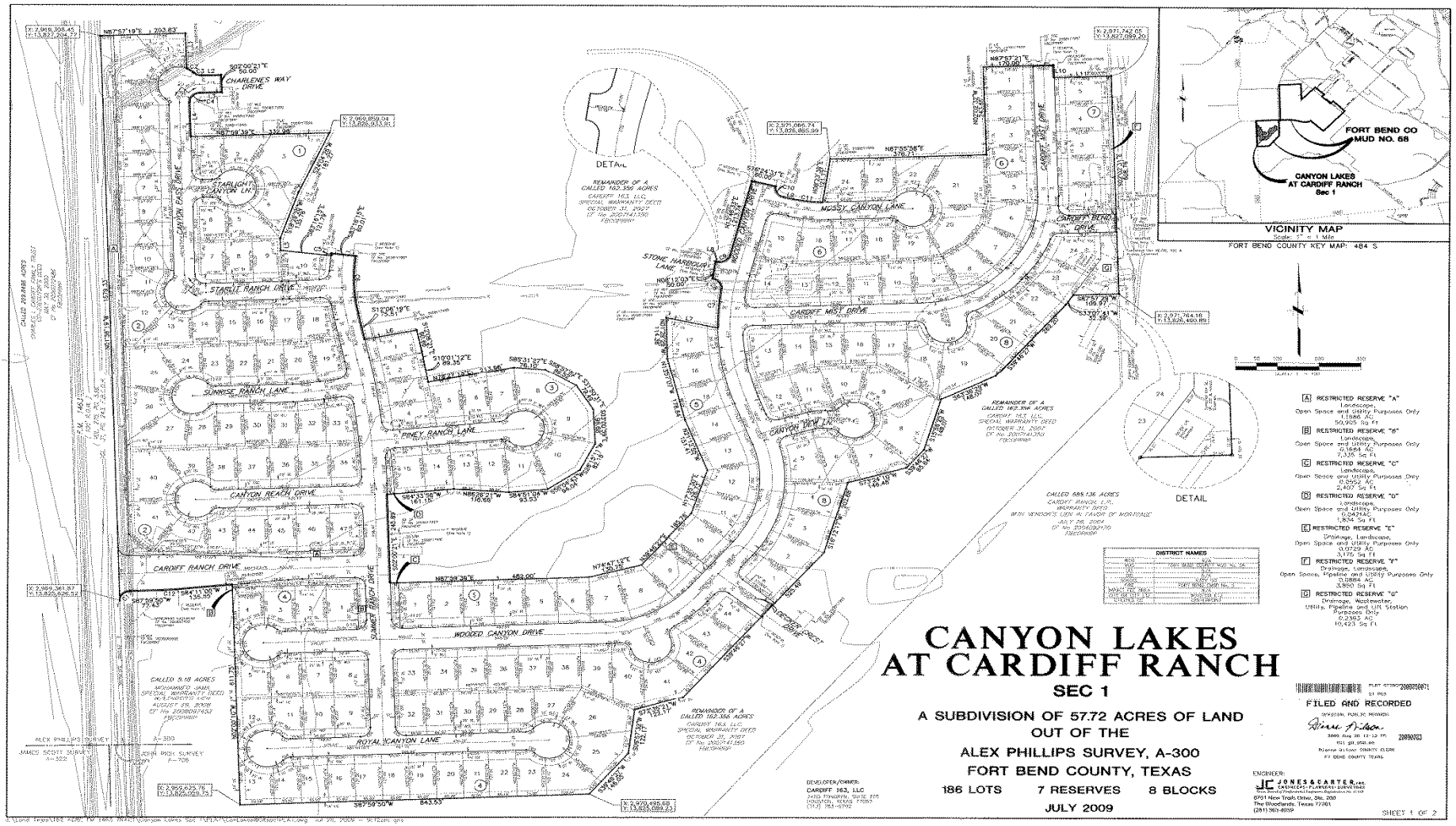
- Information on land and structures
  - Location, type, valuations (rents), age
- Demand measures
  - What and how much to build?
- Site selection and evaluation
  - Pricing mechanism
  - How profitable a project is going to be?

Future Land Use

- Continuity and change
- Path dependence
- Future Land Use
  - Existing Land Use
  - Planned and Announced Development
  - Model Predictions

Planned and Announced Development

What do we know?



CANYON LAKES AT CARDIFF RANCH

SEC 1

A SUBDIVISION OF 57.72 ACRES OF LAND
OUT OF THE
ALEX PHILLIPS SURVEY, A-300
FORT BEND COUNTY, TEXAS

186 LOTS 7 RESERVES 8 BLOCKS

JULY 2009

FILED AND RECORDED

Dianne Wilson

Dianne Wilson COUNTY CLERK
FT BEND COUNTY TEXAS

DEVELOPER/OWNER:
CARDIFF 163, LLC
2400 TOWNSEN, SUITE 210
HOUSTON, TEXAS 77002
(713) 783-6792

ENGINEER:
JONES & CARTER, INC.
ENGINEERS • PLANNERS • SURVEYORS
6701 New Trails Drive, Ste. 200
The Woodlands, Texas 77381
(281) 363-4039

SHEET 1 OF 2

Corbitt Rd
Corbitt Rd
Corbitt Rd
FM-1463
1463
FM-1463
Canyon Pass Dr
Wooded Canyon Dr
Mossy Canyon Ln
Cardiff Mist Dr
Piney Ranch Ln
Summer Ranch Dr
Cardiff Ranch Dr
Wooded Canyon Dr
Royal Canyon Ln
300 m
1000 ft

Media Sources

- Houston Chronicle
- Houston Business Journal
- Community Impact Newspaper
- Texas A&M Real estate News
- Real Estate Bisnow
- Bay Area Houston Economic Partnership
- Swamplot
- GlobeSt.com
- City-Data.com
- Local Newspapers

Houston Chronicle

HOUSTON CHRONICLE
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k Medical Retail Technology Personal Finance Chronicle 100 Markets Bloomberg

Record size residential project set to rise downtown

40-story high-rise to be the giant of rental property near Market Square

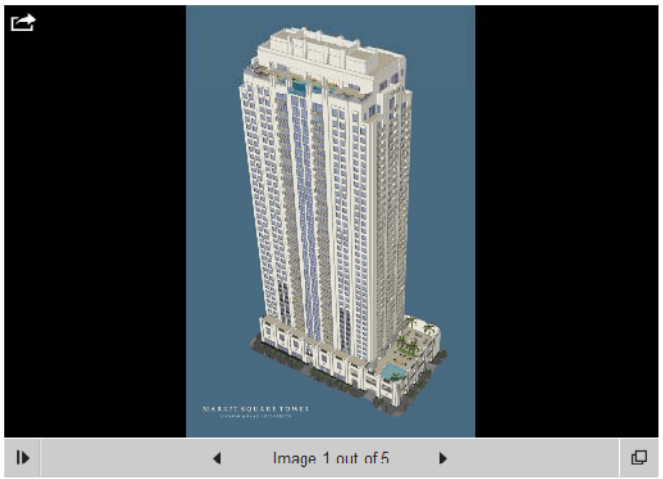
By Nancy Sarnoff

July 14, 2014 | Updated: July 15, 2014 9:31am

A developer plans to break ground next month on what will be downtown's tallest residential tower, a project symbolic of this city's healthy economy and downtown's growing emergence as a place to call home.

The Texas-sized tower is set to rise 40 stories and house 463 apartments built to almost-condominium standards, the developers said Monday.

"It's big," said Jack Lee, president of Oakmont Group, the project manager. "It's bigger than any other downtown Houston high-rise rental property we know of."



Courtesy of Woodbranch Investmen

Market Square Tower
Units: 463
Floors: 40
Avg. Unit size: 1,275
Avg. Rent: $3,500
Year: 2017

Houston Business Journal

May 2, 2014, 4:18pm CDT | **UPDATED:** May 5, 2014, 10:47am CDT

FMC Technologies breaks ground on campus to consolidate local operations

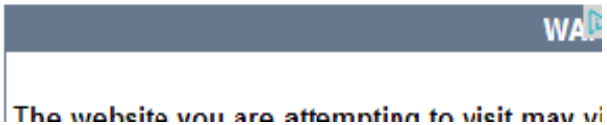
Olivia Pulsinelli
Web producer-
Houston Business Journal
Email | Twitter | Google+

FMC Technologies Inc. (NYSE: FTI) broke ground on its new campus at Generation Park on May 2.

The Houston-based oil and gas ecuipment company bought 173 acres at the business park, off the northeast corner of Beltway 8, in late 2012. When it bought the land, the company said it would provide "flexibility and options as it assesses its future needs in the Houston area."

Courtesy Gensler

FMC Technologies Inc. (NYSE: FTI) broke ground on its new campus at Generation Park on May 2.



FMC Technologies
Area: 70 acres
SQFT: 1 million
Jobs: 1,800
Year: 2016

Community Impact Newspaper

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Toll Brothers set to begin first Sienna South home sales in spring 2015

by John Rigg April 2, 2014

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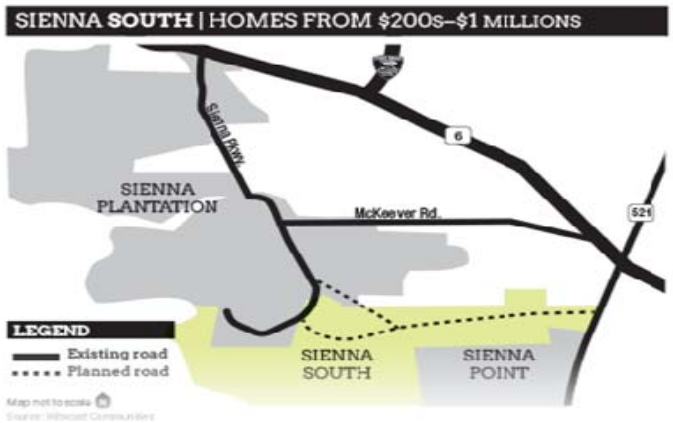


In 2013, the final pieces of Sienna Plantation began to fall into place with the opening of its newest communities off Sienna Ranch Road featuring 16 model homes. As the master-planned community nears build-out, Hillwood Communities sold 3,700 acres of a new section—Sienna South—to national luxury home builder Toll Brothers for residential development.

"With Houston's well-publicized shortage of available home sites in premier master-planned communities, we believe the project's timing, Sienna Plantation's stellar reputation, our experienced management team, excellent location, amenities, and highly rated schools will attract home builders and homebuyers across the price-point spectrum," said Karl Mistry, Houston Division president with Toll Brothers.

<u>Sienna South</u>

Area: 3,700 acres

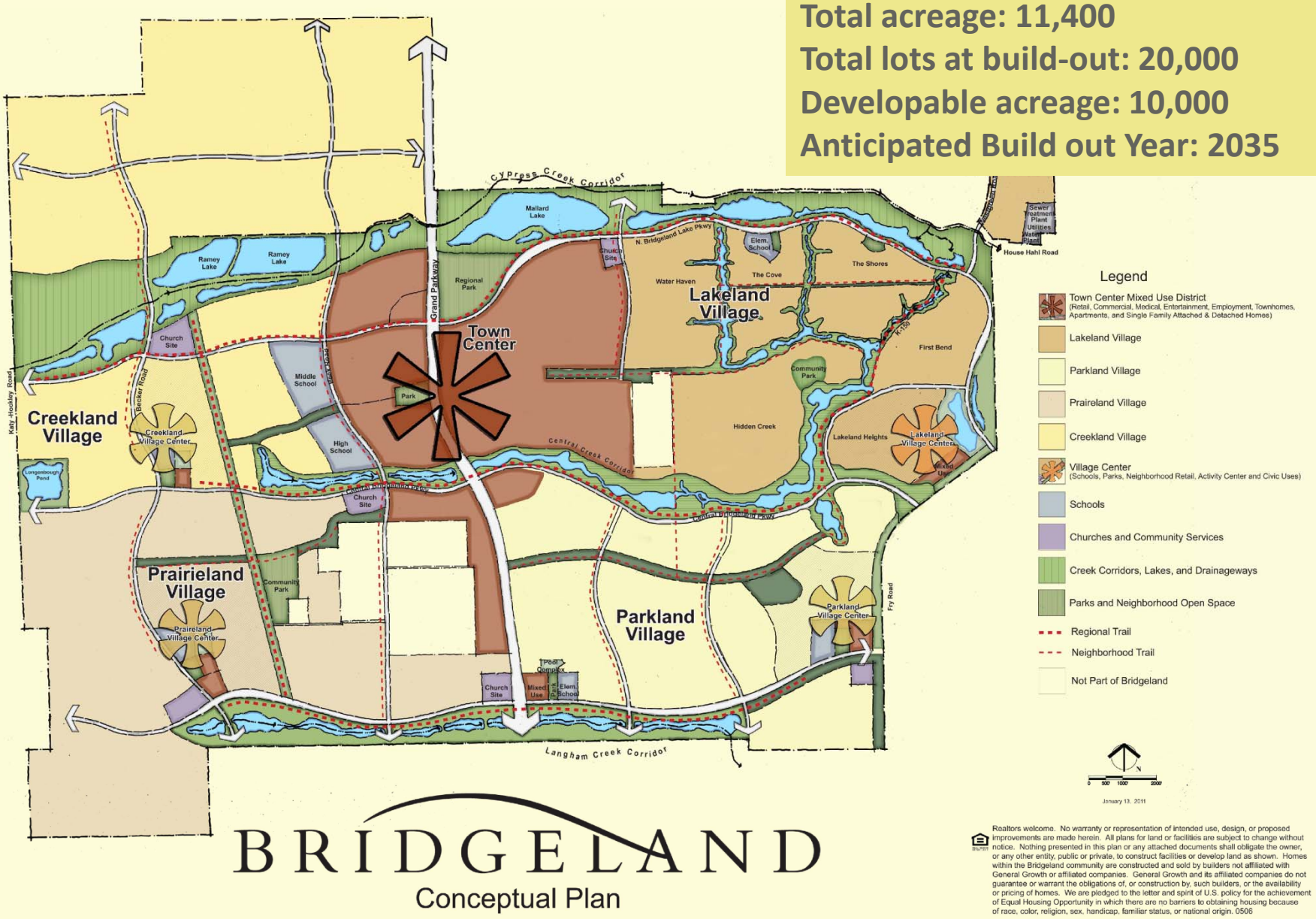
Homes: 6,500

Aggregate Home Sales: $2.1 billion

Const. Span: 15 Years

Bridgeland

Total acreage: 11,400
Total lots at build-out: 20,000
Developable acreage: 10,000
Anticipated Build out Year: 2035

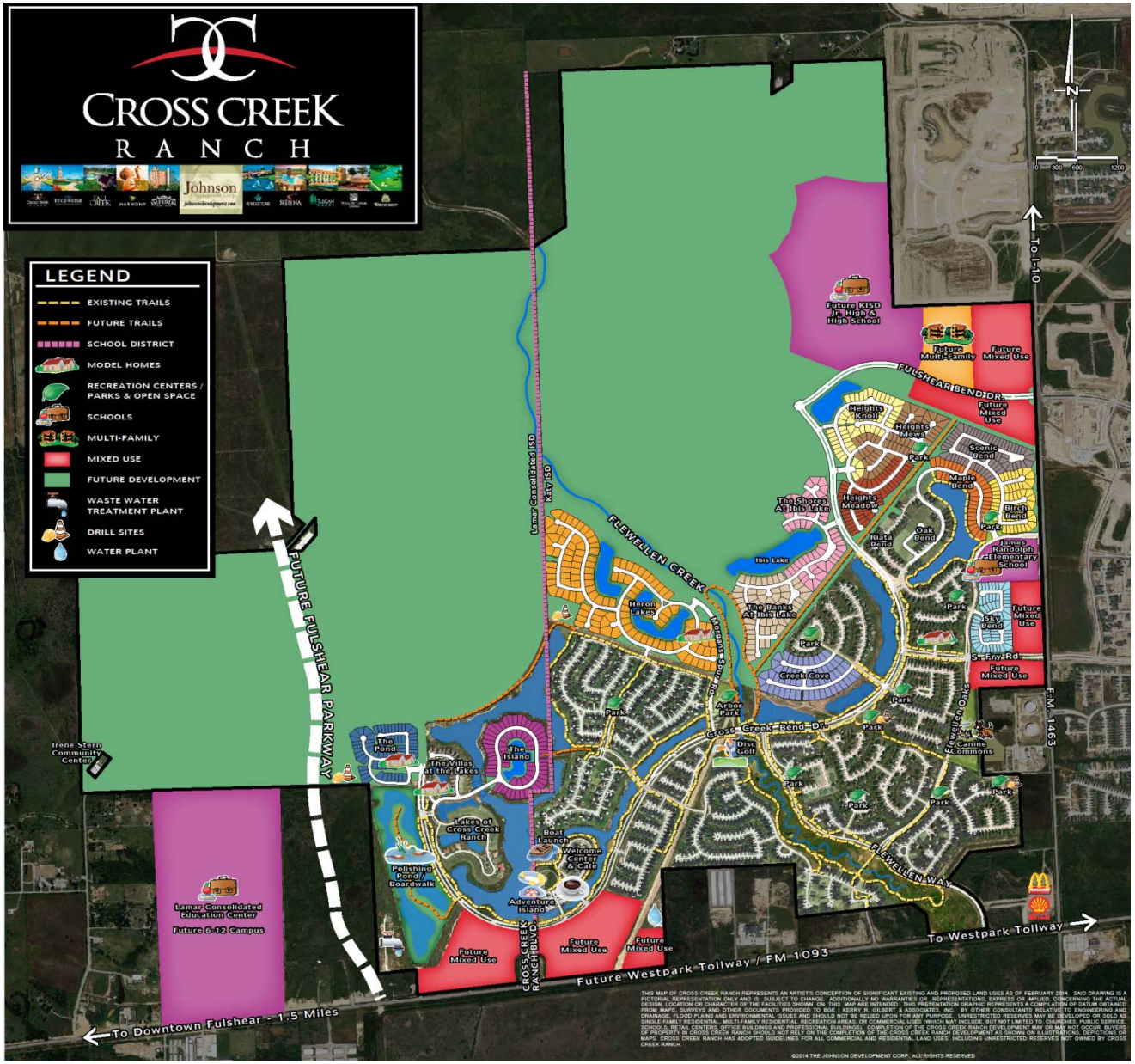


BRIDGELAND

Conceptual Plan

Realtors welcome. No warranty or representation of intended use, design, or proposed improvements are made herein. All plans for land or facilities are subject to change without notice. Nothing presented in this plan or any attached documents shall obligate the owner, or any other entity, public or private, to construct facilities or develop land as shown. Homes within the Bridgeland community are constructed and sold by builders not affiliated with General Growth or affiliated companies. General Growth and its affiliated companies do not guarantee or warrant the obligations of, or construction by, such builders, or the availability or pricing of homes. We are pledged to the letter and spirit of U.S. policy for the achievement of Equal Housing Opportunity in which there are no barriers to obtaining housing because of race, color, religion, sex, handicap, familiar status, or national origin. 0506

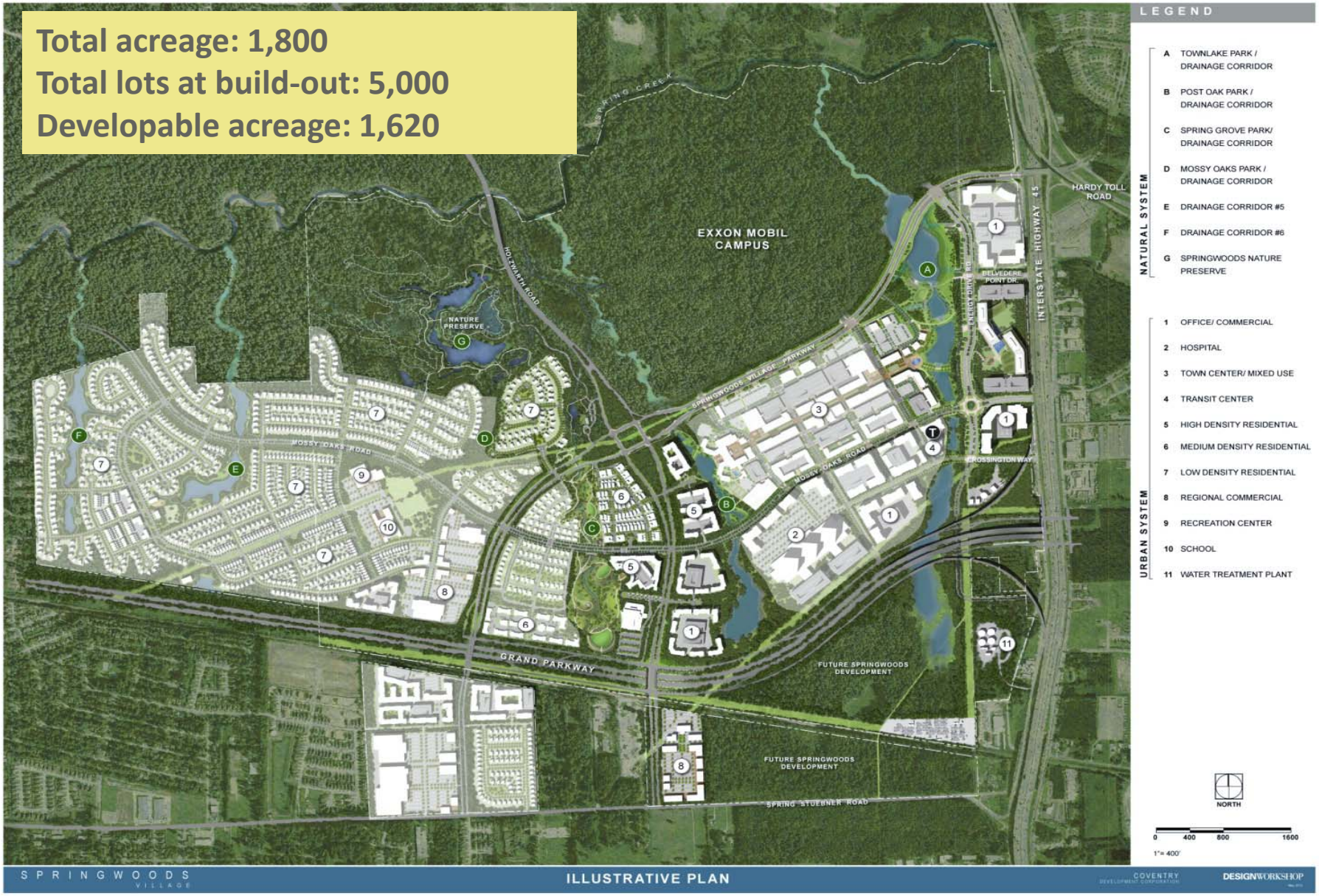
Cross Creek Ranch



Total acreage: 3,200
Total Units: 7,200
Anticipated Build out Year: 2025

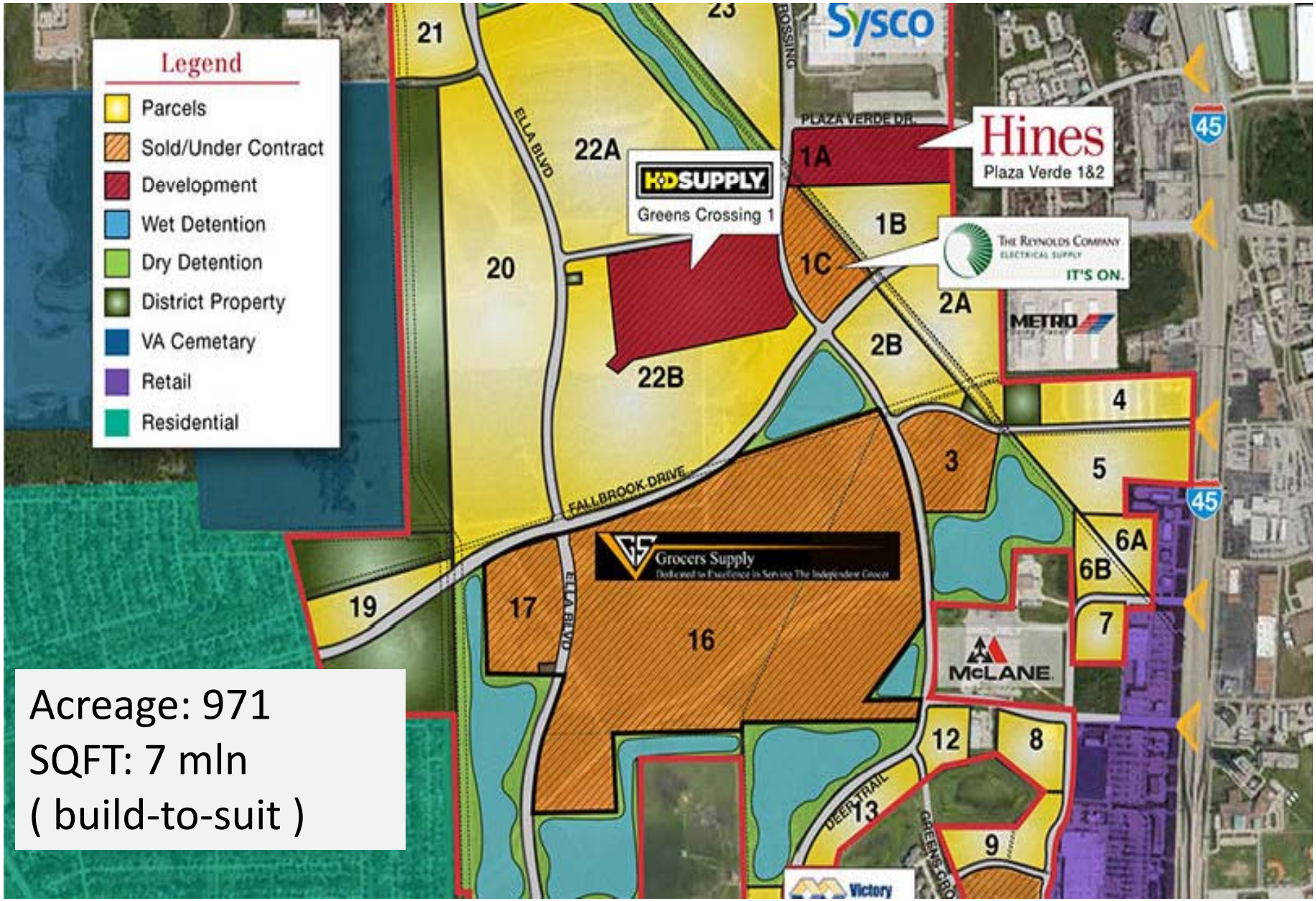
Springwoods Village

Total acreage: 1,800
Total lots at build-out: 5,000
Developable acreage: 1,620



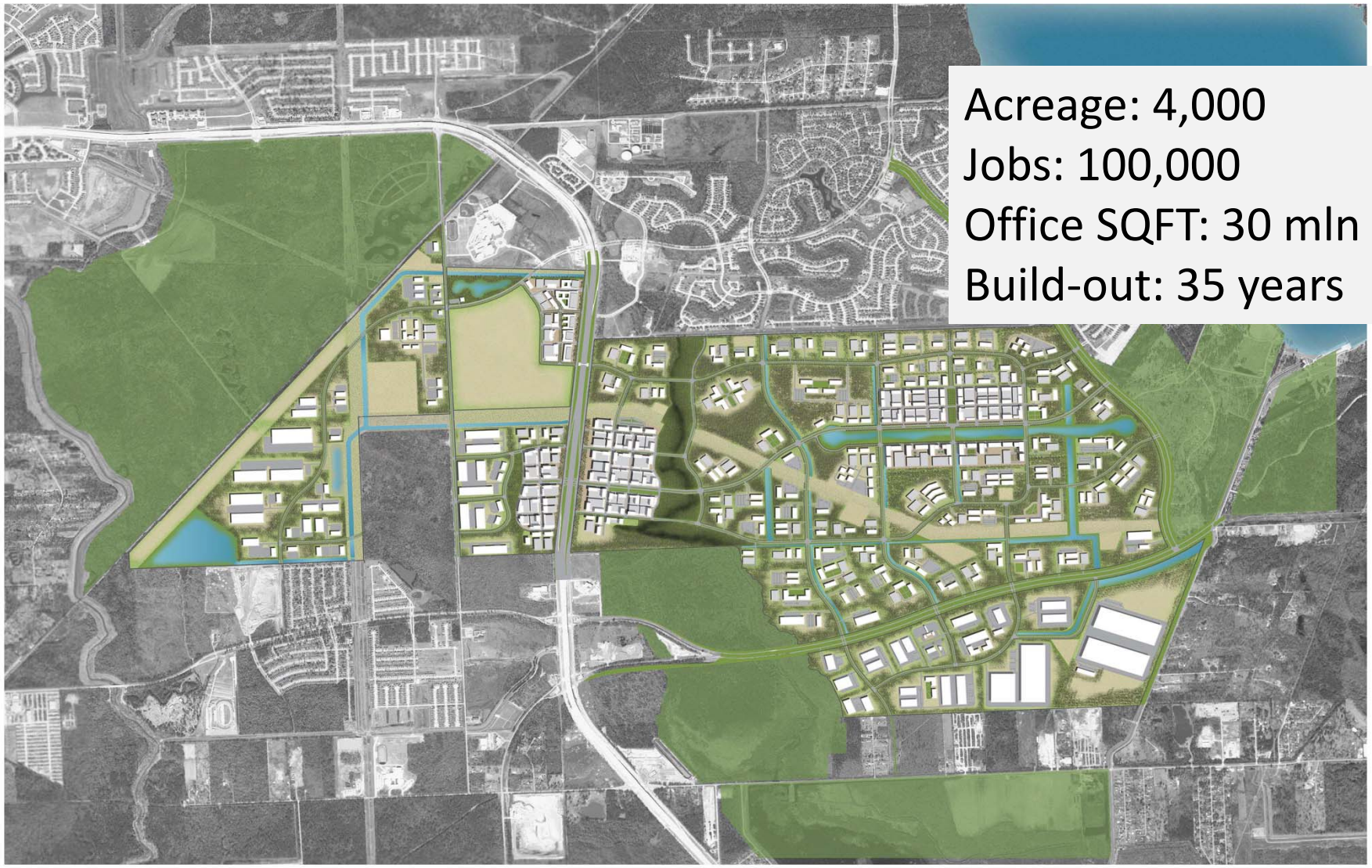
Exxon Campus

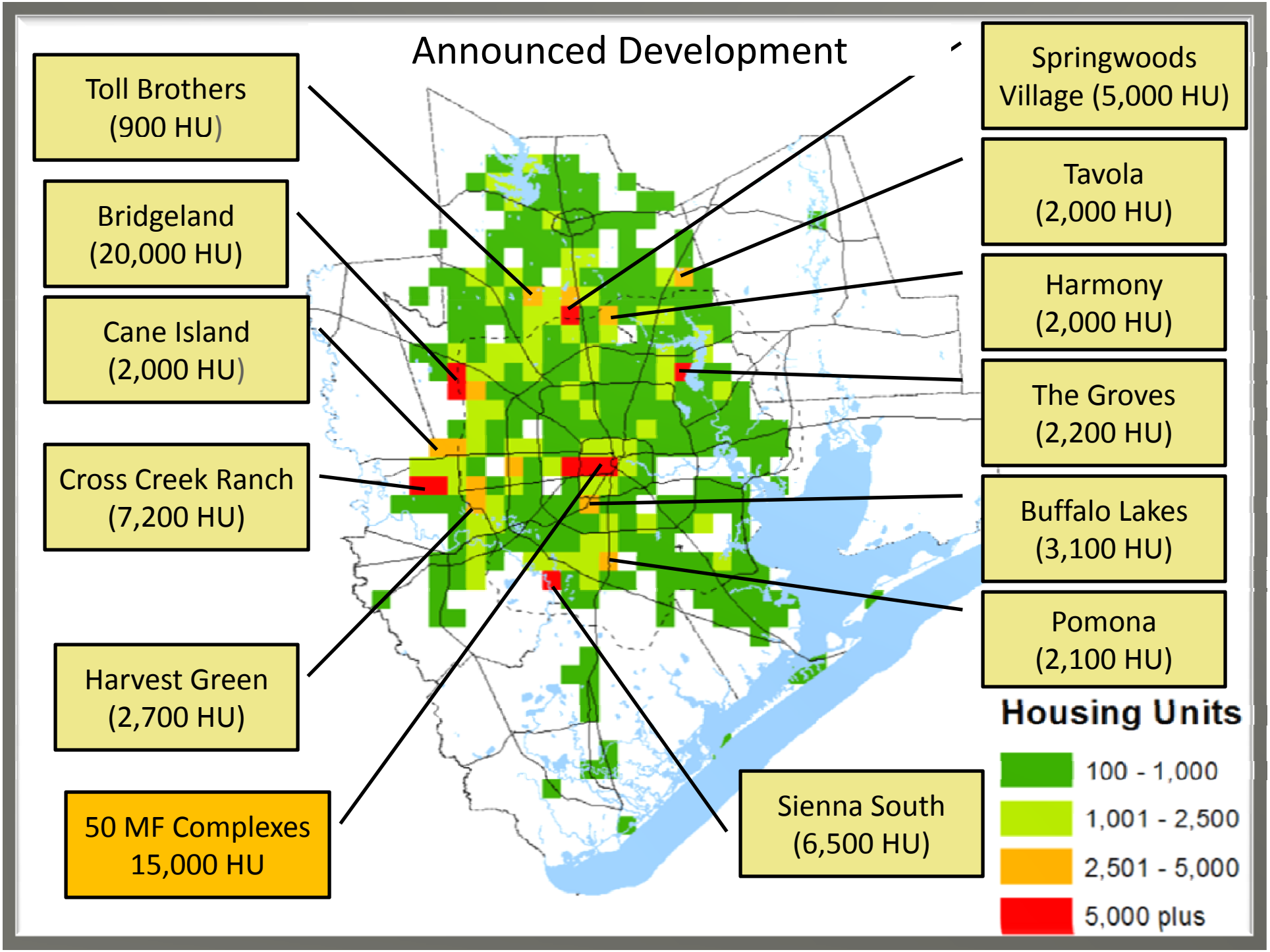
Pinto Business Park

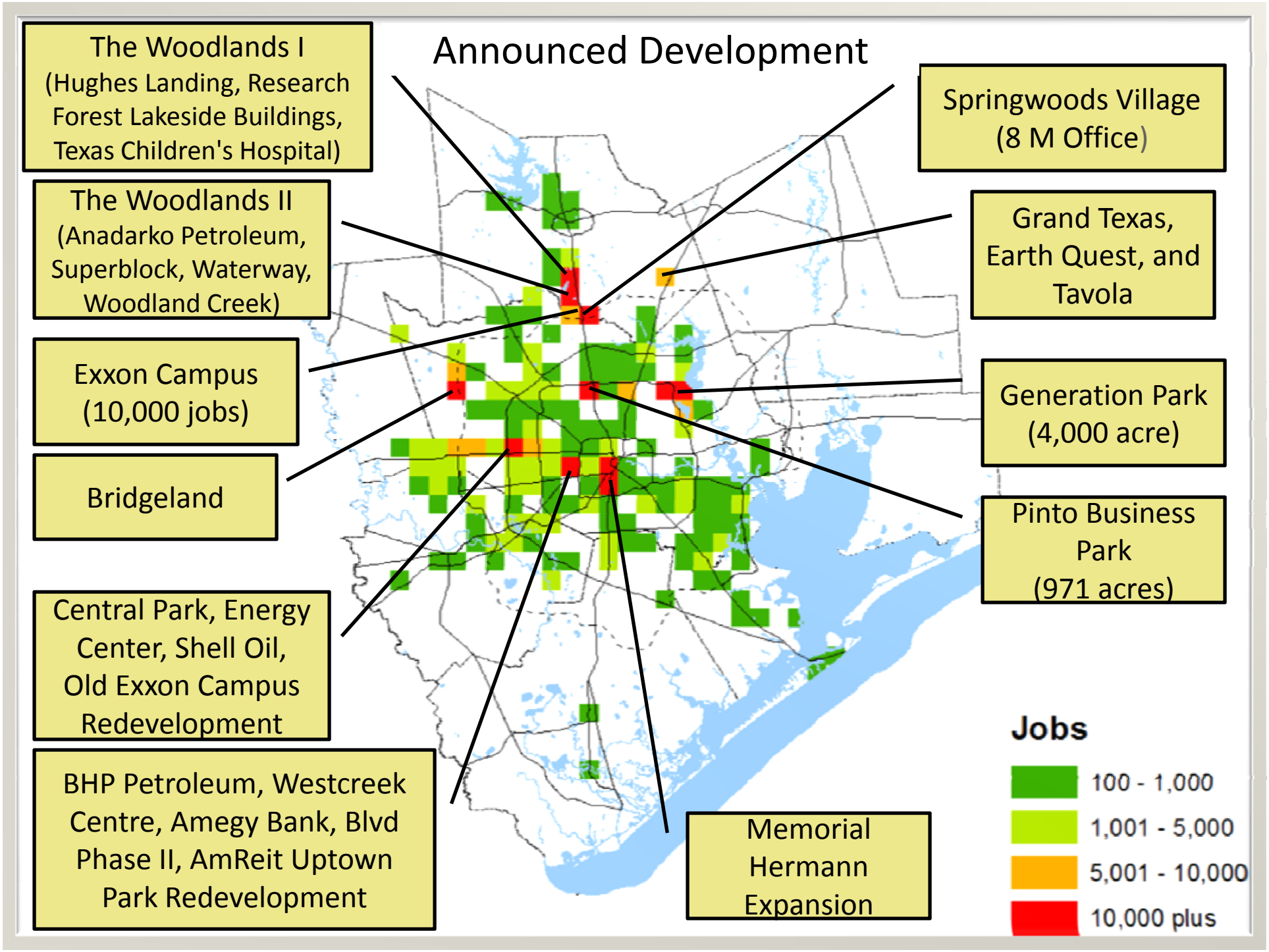


Acreage: 971
SQFT: 7 mln
(build-to-suit)

Generation Park




Announced Development
Toll Brothers (900 HU)
Bridgeland (20,000 HU)
Cane Island (2,000 HU)
Cross Creek Ranch (7,200 HU)
Harvest Green (2,700 HU)
50 MF Complexes 15,000 HU
Springwoods Village (5,000 HU)
Tavola (2,000 HU)
Harmony (2,000 HU)
The Groves (2,200 HU)
Buffalo Lakes (3,100 HU)
Pomona (2,100 HU)
Sienna South (6,500 HU)
Housing Units
100 - 1,000
1,001 - 2,500
2,501 - 5,000
5,000 plus

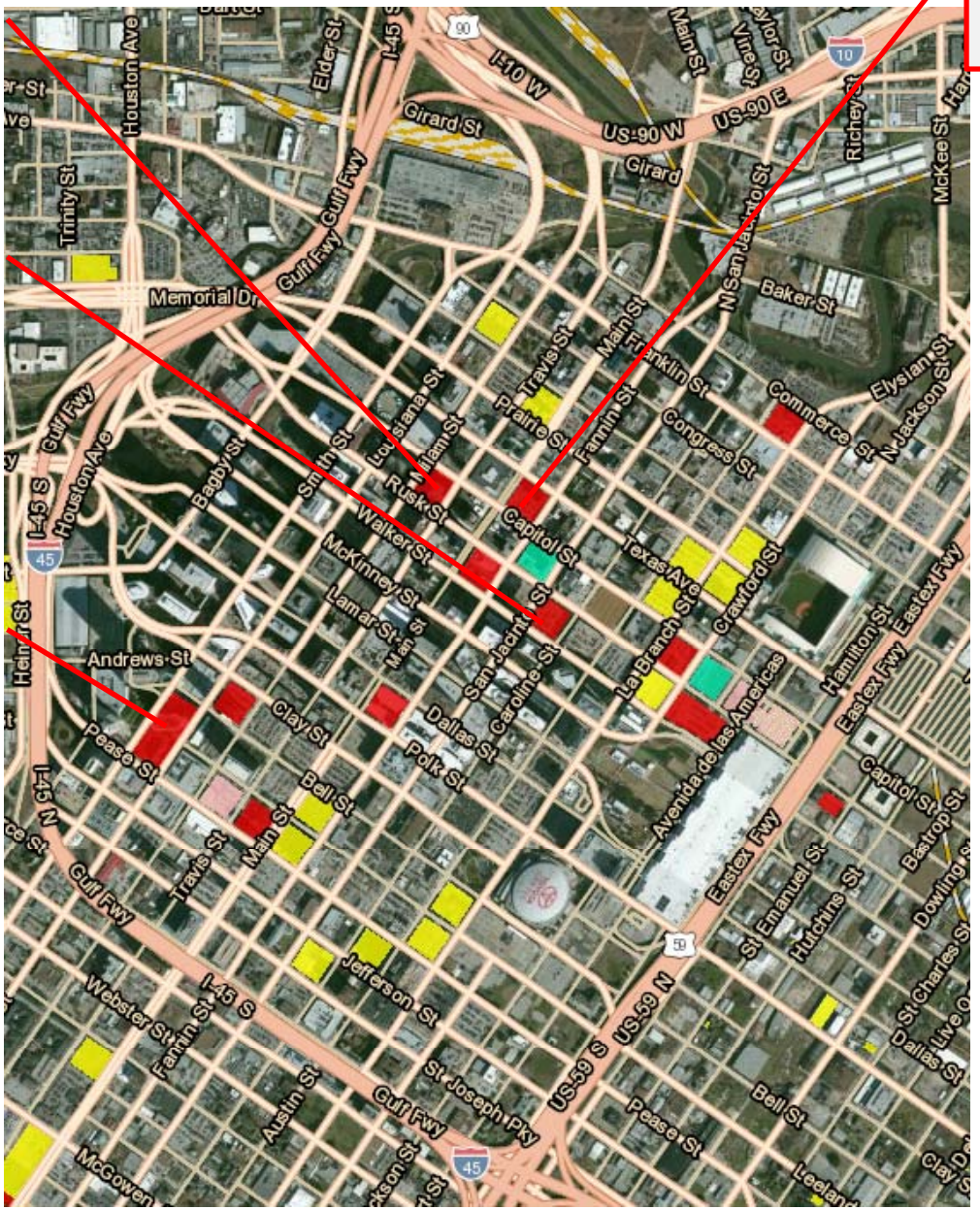

Announced Development
The Woodlands I (Hughes Landing, Research Forest Lakeside Buildings, Texas Children's Hospital)
The Woodlands II (Anadarko Petroleum, Superblock, Waterway, Woodland Creek)
Exxon Campus (10,000 jobs)
Bridgeland
Central Park, Energy Center, Shell Oil, Old Exxon Campus Redevelopment
BHP Petroleum, Westcreek Centre, Amegy Bank, Blvd Phase II, AmReit Uptown Park Redevelopment
Springwoods Village (8 M Office)
Grand Texas, Earth Quest, and Tavola
Generation Park (4,000 acre)
Pinto Business Park (971 acres)
Memorial Hermann Expansion
Jobs
100 - 1,000
1,001 - 5,000
5,001 - 10,000
10,000 plus

Development in Downtown: Office

Capitol Tower
(34 story, 0.7M, 2017)

6 Houston Center
(30 story, 0.6M, 2016)

Chevron
(50 story, 1.7M, 2016)



Hines Tower
(47 Story, 1M, 2017)

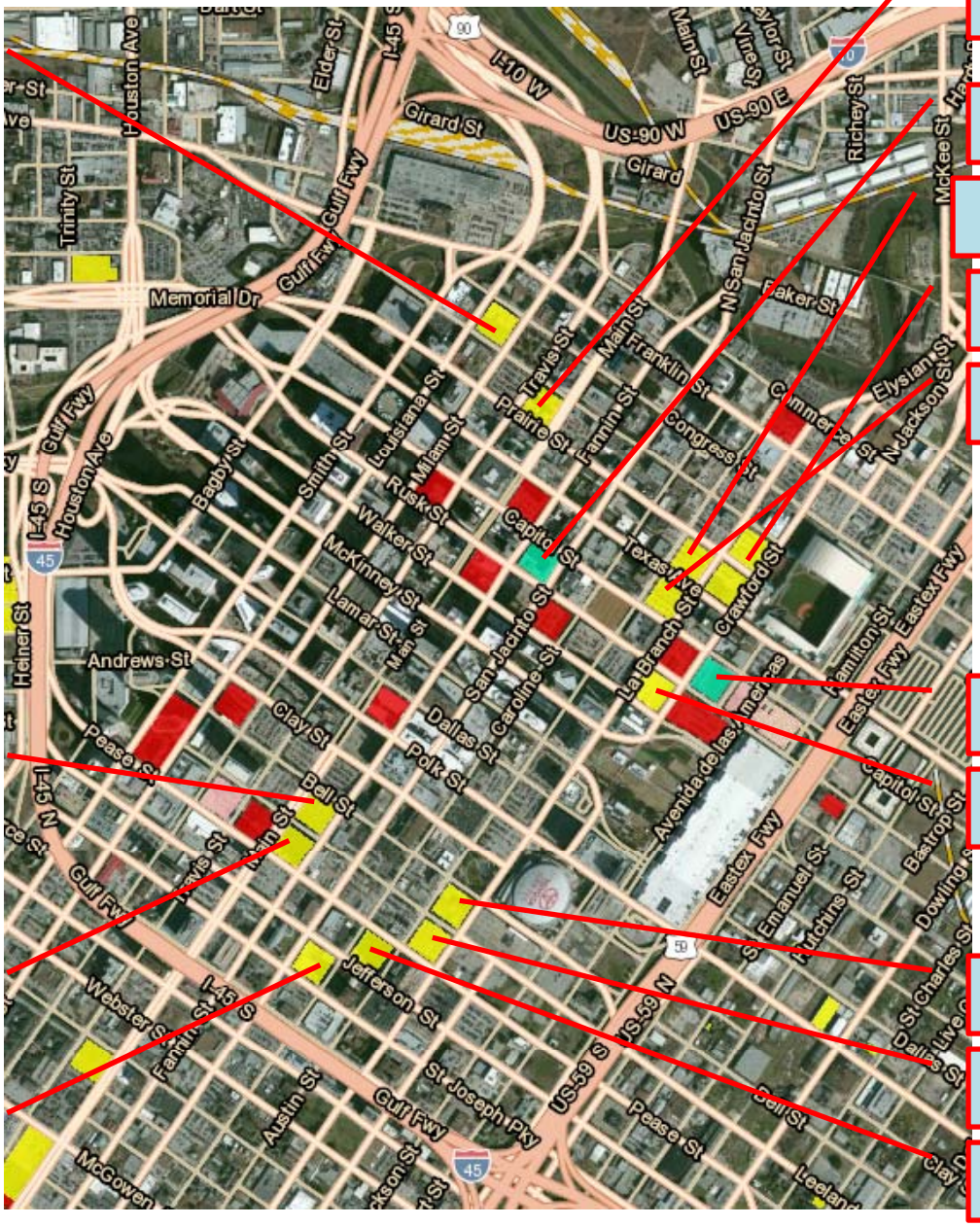
Development in Downtown: Residential

Market Square Tower
(40 story, 463 units, 2017)

Alliance Apt.
(4 story, 207 units, 2015)

Skyhouse Apt.
(24 story, 336 units, 2014)

Allied Orion Apt.
(10 story, 302 units, 2016)



Market Square Apt
(33 Story, 289 units, 2016)

Apartments
(29 Story, 309 units,2015)

Marquette Land Invest.
(28 Story, 380units, 2015)

500 Crawford
(7 Story, 397 units, 2015)

Planned Res.
(6 Story, 267 units, 2017)

Planned Res.
(38Story, 300 units, 2018)

Block 98 Res.
(39Story, 314 units, 2017)

Camden Apt.
(12 story, 259 units, 2018)

Camden Apt.
(12 story, 259 units, 2016)

Leon Capital Apt.
(220units, 2016)

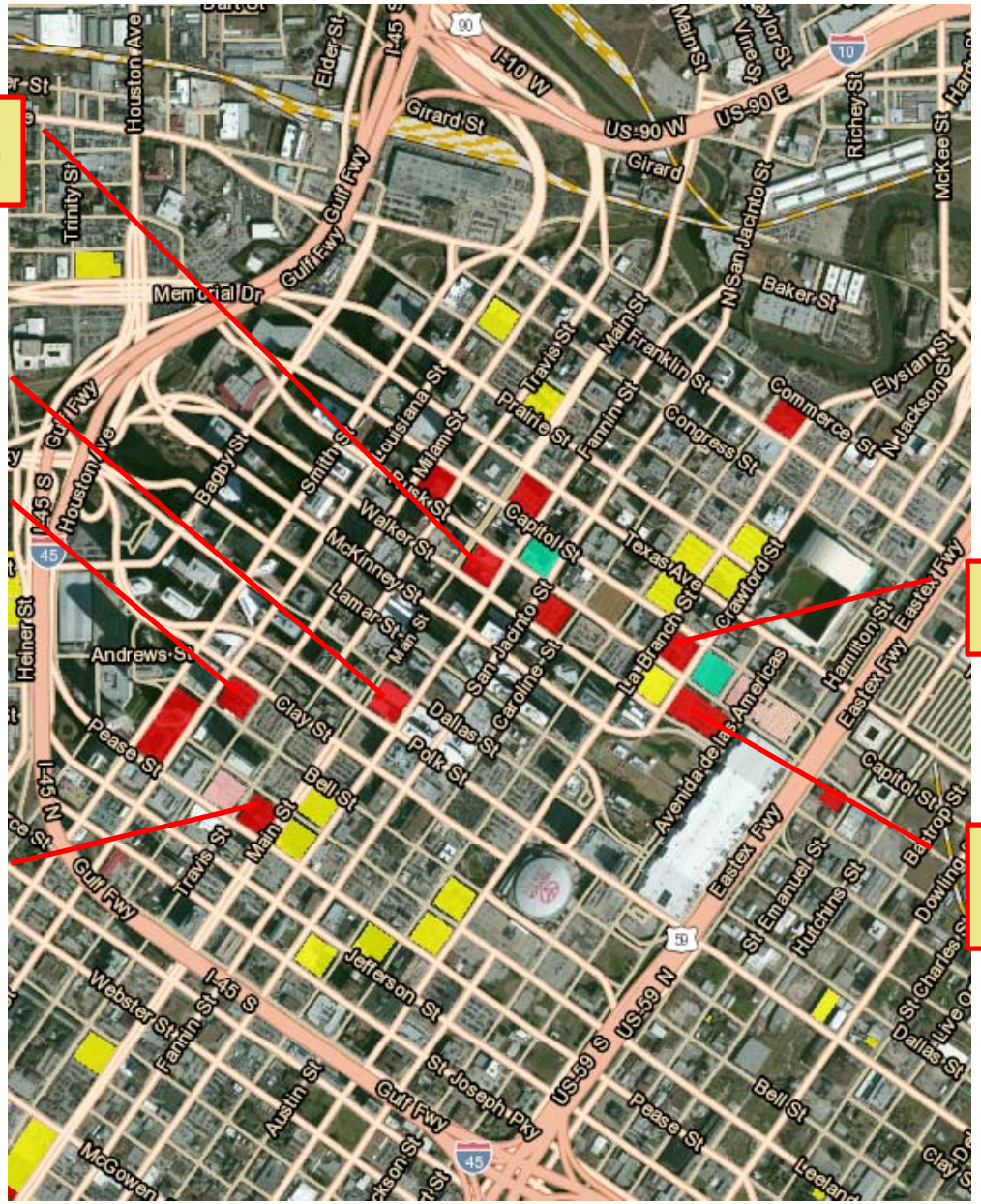
Development in Downtown: Hotels

Aloft Houston Downtown

Hotel Alessandra

Hilton Garden Inn
(12 story, 230rooms, 2016)

Holiday Inn



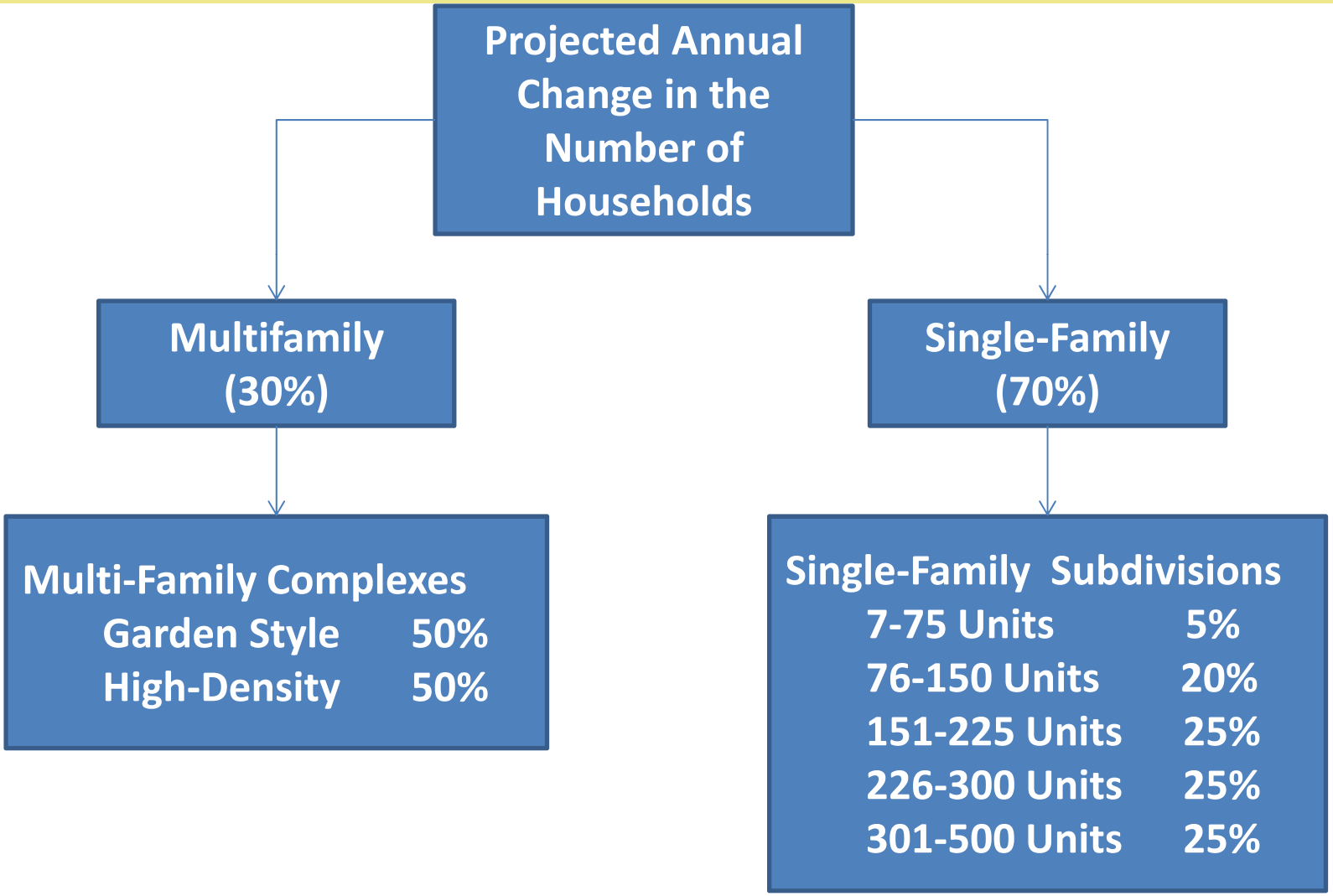
Hyatt Place and Hampton Inn

Marriott Marquis
(29 story, 1000 rooms, 2016)

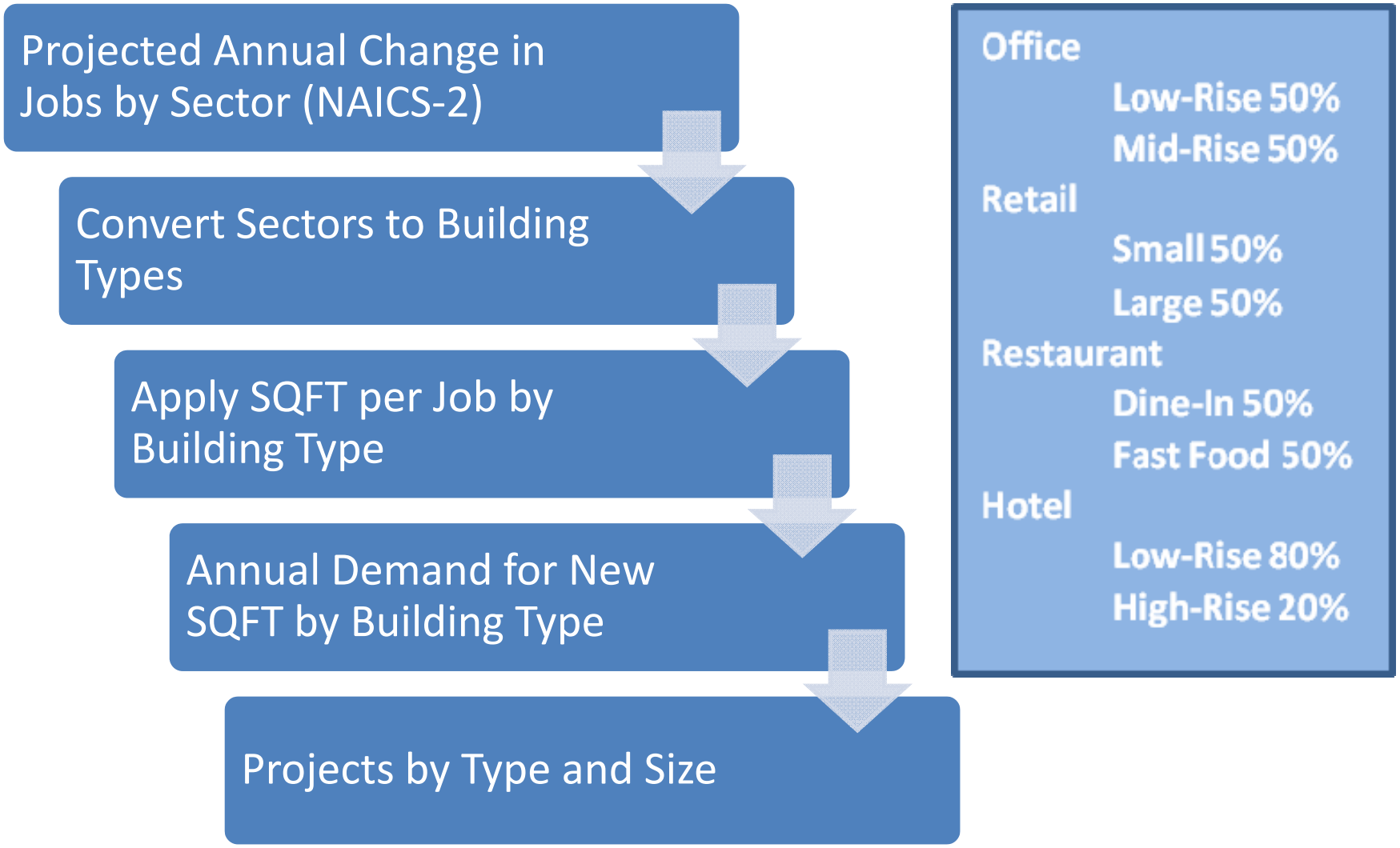
Summary of Planned Projects

Building Type	Housing Units (thousands)	SQFT (millions)
Apartments	75	
Condo Residential	3	
Educational		8
Hospital		7
Hotel		11
Industrial		19
Office		71
Restaurants		2
Retail		54
Senior-Living		1
Single-Family	164	
Warehouse		35

Residential Demand



Non-Residential Demand



Model Predictions

Where to build?

Generating Development Proposals

Proposal Selection

Select a proposal (based on ROI)

"Build" a project

Reduce demand targets

Continue until demand is met

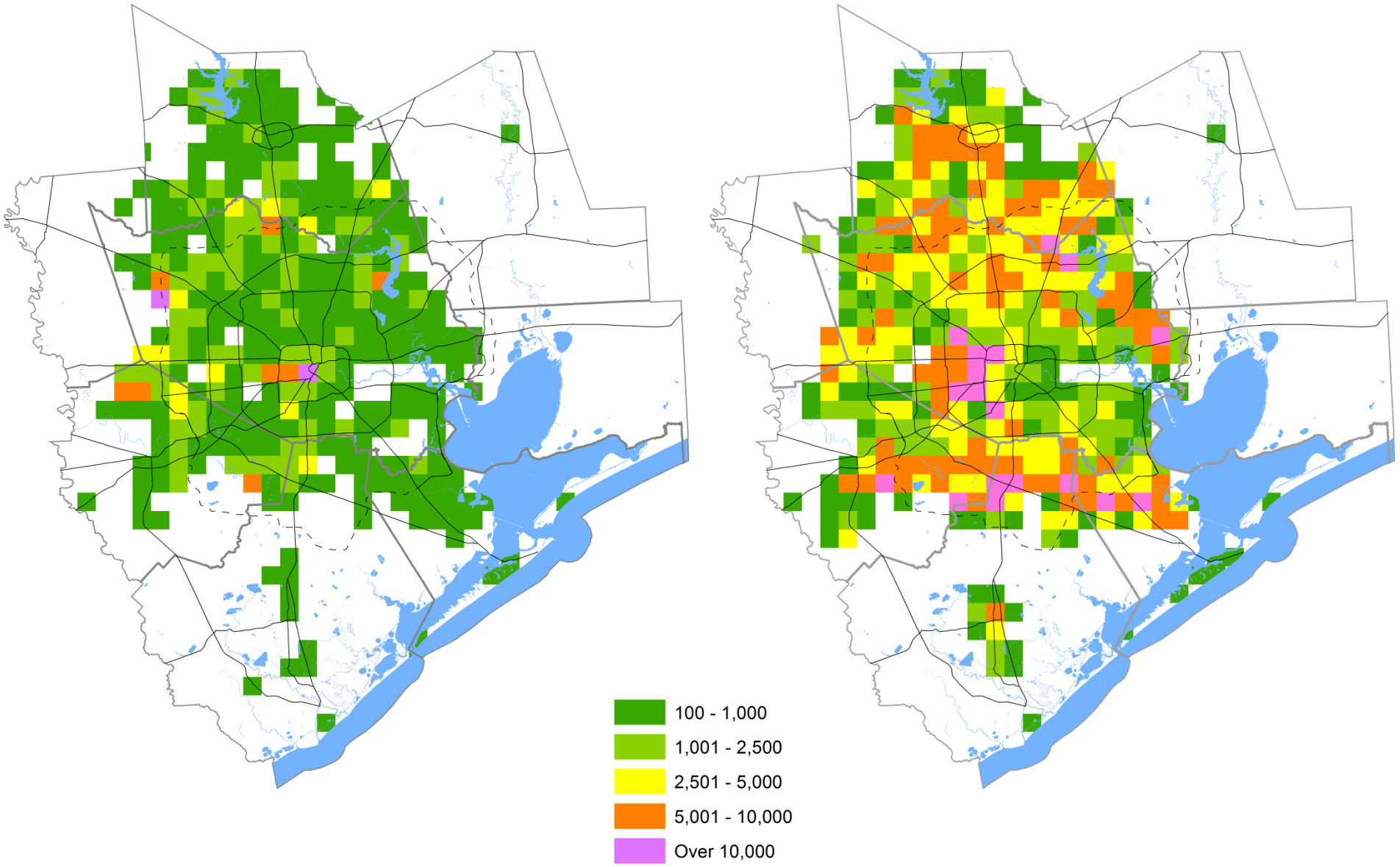
Expected Sale Price

- What is the market value of a specific project in a specific place?
- Use existing data to test how different factors affect valuations
- Factors
  - Accessibility to jobs and housing
  - Proximity to arterials and highways
  - Recent development activity
  - Building characteristics

Planned Development

Model Predictions

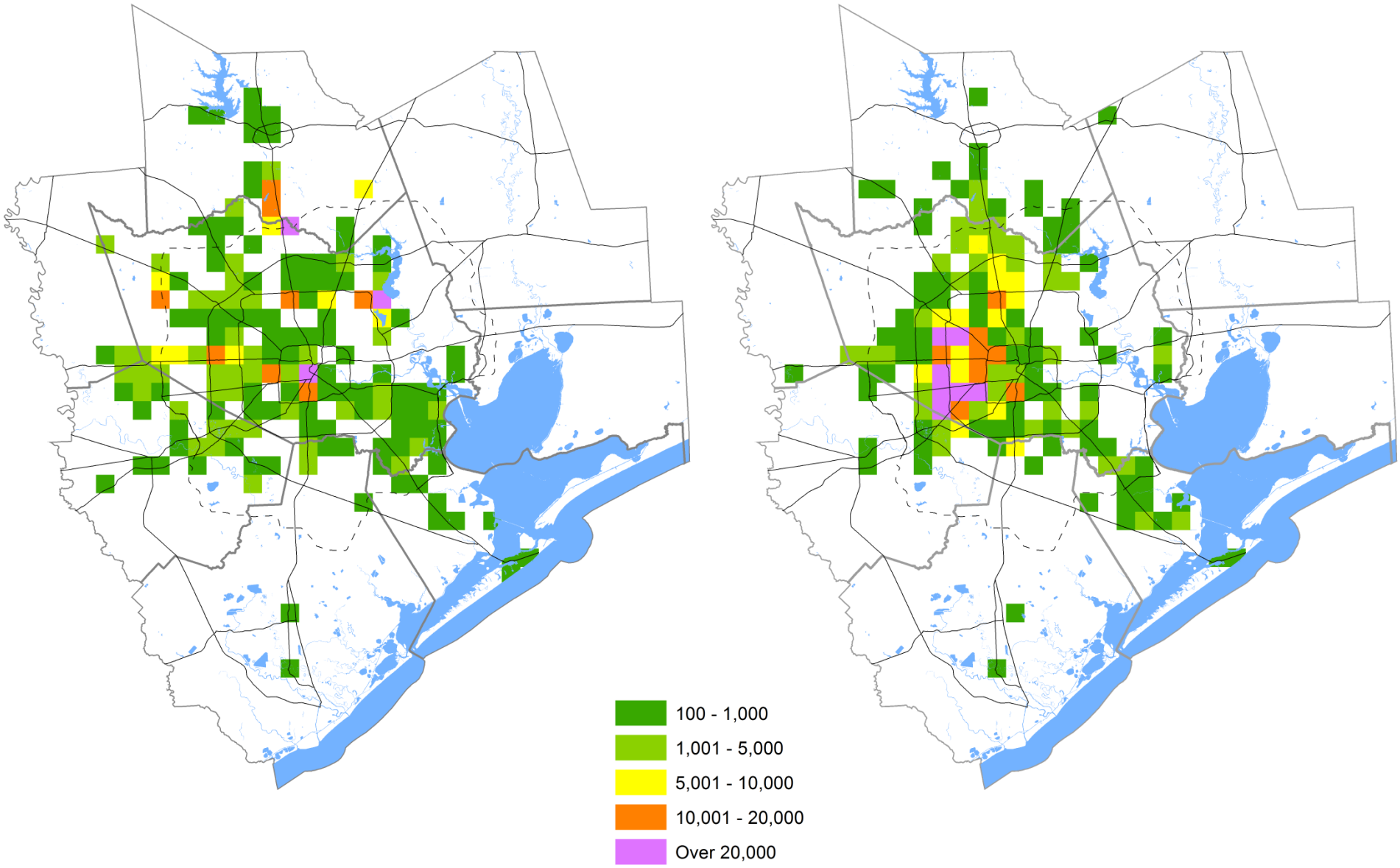
Housing Units



Planned Development

Model Predictions

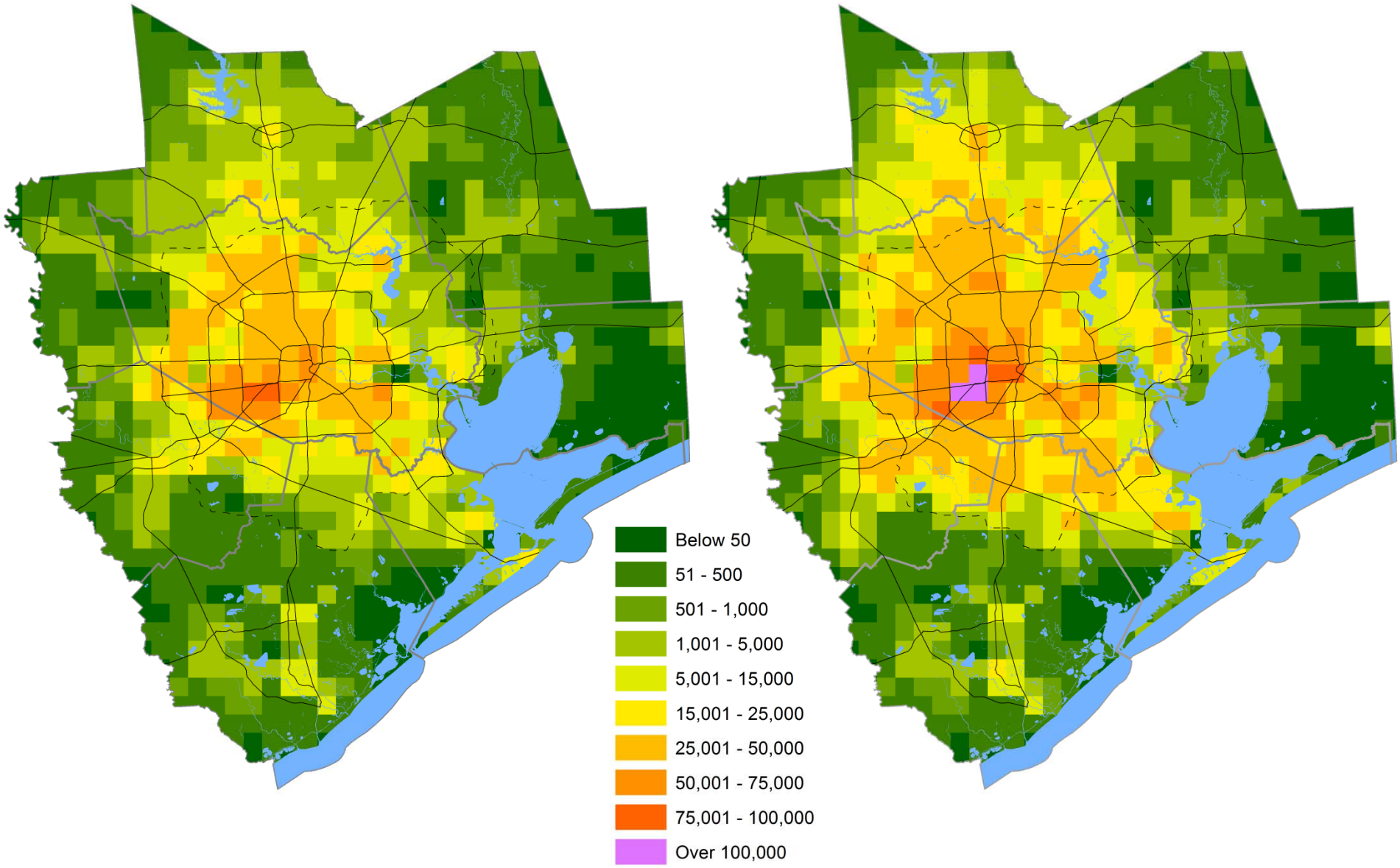
Jobs



2010

2040

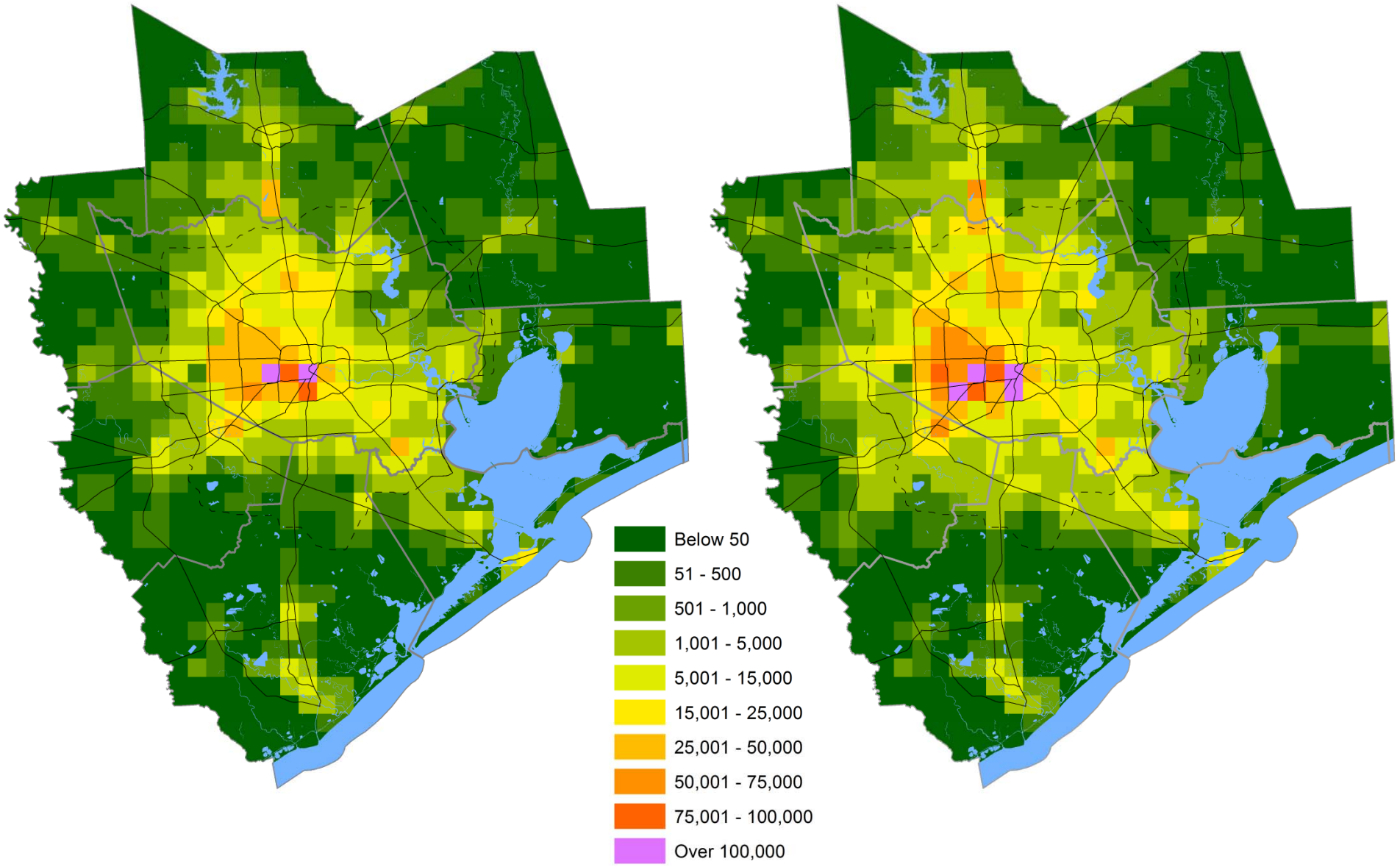
Population



2010

2040

Jobs



Future Directions

- Household Housing Choices
- “Pro forma”
- 3D visualization

Development Options

Option 1. Multi-Family Apartment

Option 2. Office Complex

Option 3. Mixed-Use Development

Option 1. Multi-Family Apartment

Pro Forma	
Land Area (SF)	462,000 SF (10 Acre)
Units/Building Gross SF	590 units/708,000 SF
Annual Gross Potential Income ($)	12 Million
Operating Income ($)	4 Million
Total Building Hard Costs ($)	31 Million
Total Development Budget ($)	57 Million
Project Return on Cost (ROC)	**7.12 %**

Option 2. Office Complex

Pro Forma	
Land Area (SF)	462,000 SF (10 Acre)
Units/Building Gross SF	100,000 SF
Annual Gross Potential Income ($)	27 Million
Operating Income ($)	19 Million
Total Building Hard Costs ($)	105 Million
Total Development Budget ($)	187 Million
Project Return on Cost (ROC)	**10.41 %**

Option 3. Mixed-Use Development

Pro Forma	
Land Area (SF)	390,000 SF (9 Acre)
Units/Building Gross SF	MF: 463 units/558,000 SF Retail: 124,000 SF
Annual Gross Potential Income ($)	14 Million
Operating Income ($)	7 Million
Total Building Hard Costs ($)	42 Million
Total Development Budget ($)	84 Million
Project Return on Cost (ROC)	**8.36 %**

Forecast as a Continuous Process

- Quarterly Releases
  - January, April, July, October
  - October 15, 2014: 2014Q3
- Each release includes
  - New information
  - Corrections based on review
  - Model improvements

Land Use – Population Link

- Population and employment are tied to land use (parcels and buildings)
- Population and/or employment forecasts cannot be changed without changing the underlying land use

Review

- Your feedback is extremely valuable
- Factual mistakes (data errors) will be corrected as a matter of course
- Other comments will be thoroughly reviewed and addressed properly
- RLUIS
  - Regional Land Use Information System

spotlight on the REGIONAL GROWTH FORECAST

?

www.h-gac.com/forecast

forecast@h-gac.com

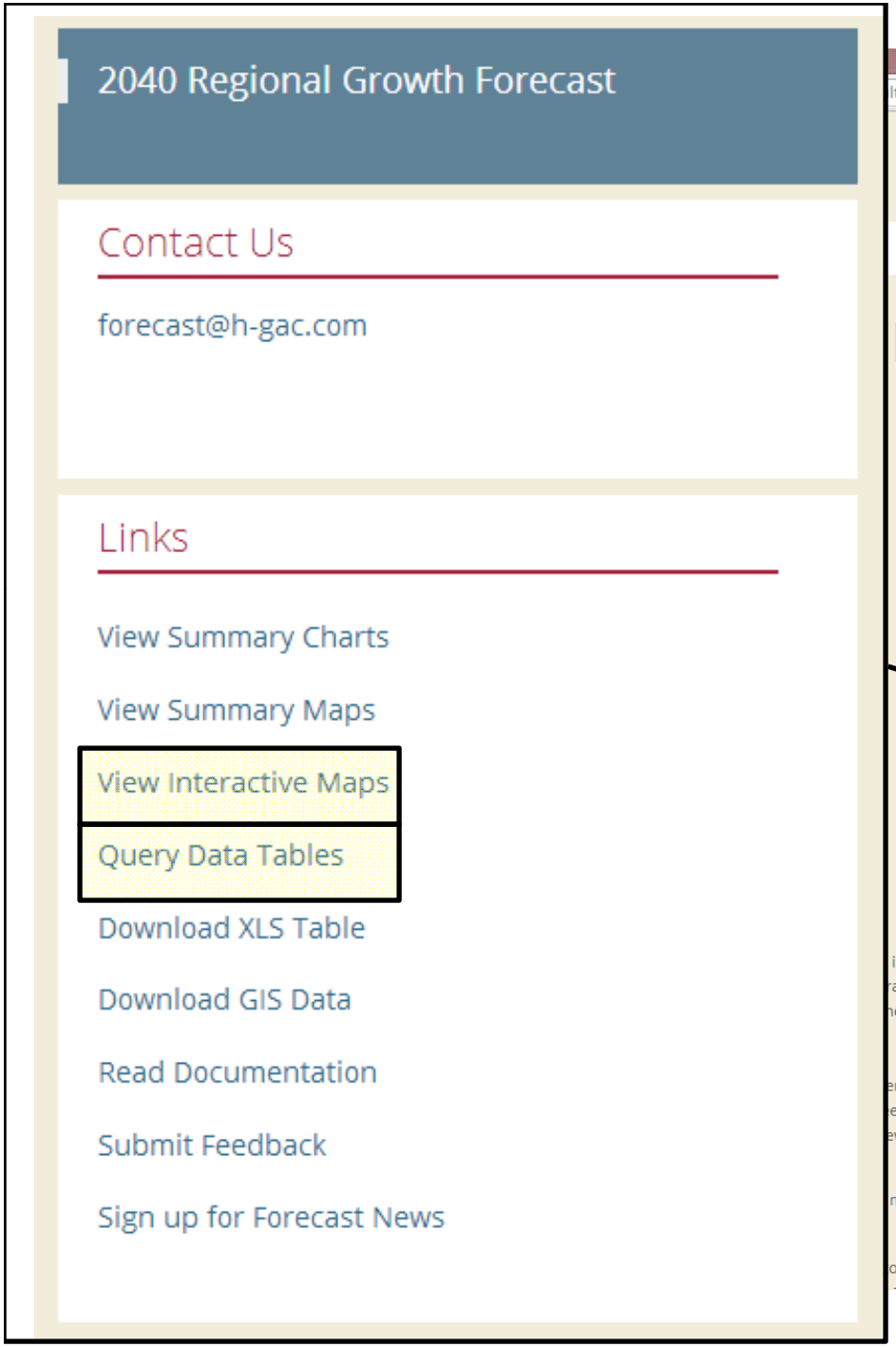
spotlight on the REGIONAL GROWTH FORECAST

Friday, August 1, 2014

Houston-Galveston Area Council

Part III: Accessing Data and Providing Feedback

www.h-gac.com/forecast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nd, Galveston, Harris, Liberty,
eneral public every quarter. Each
edback, and improvements to the
ew release is current through the
maps, use our web-based mapping
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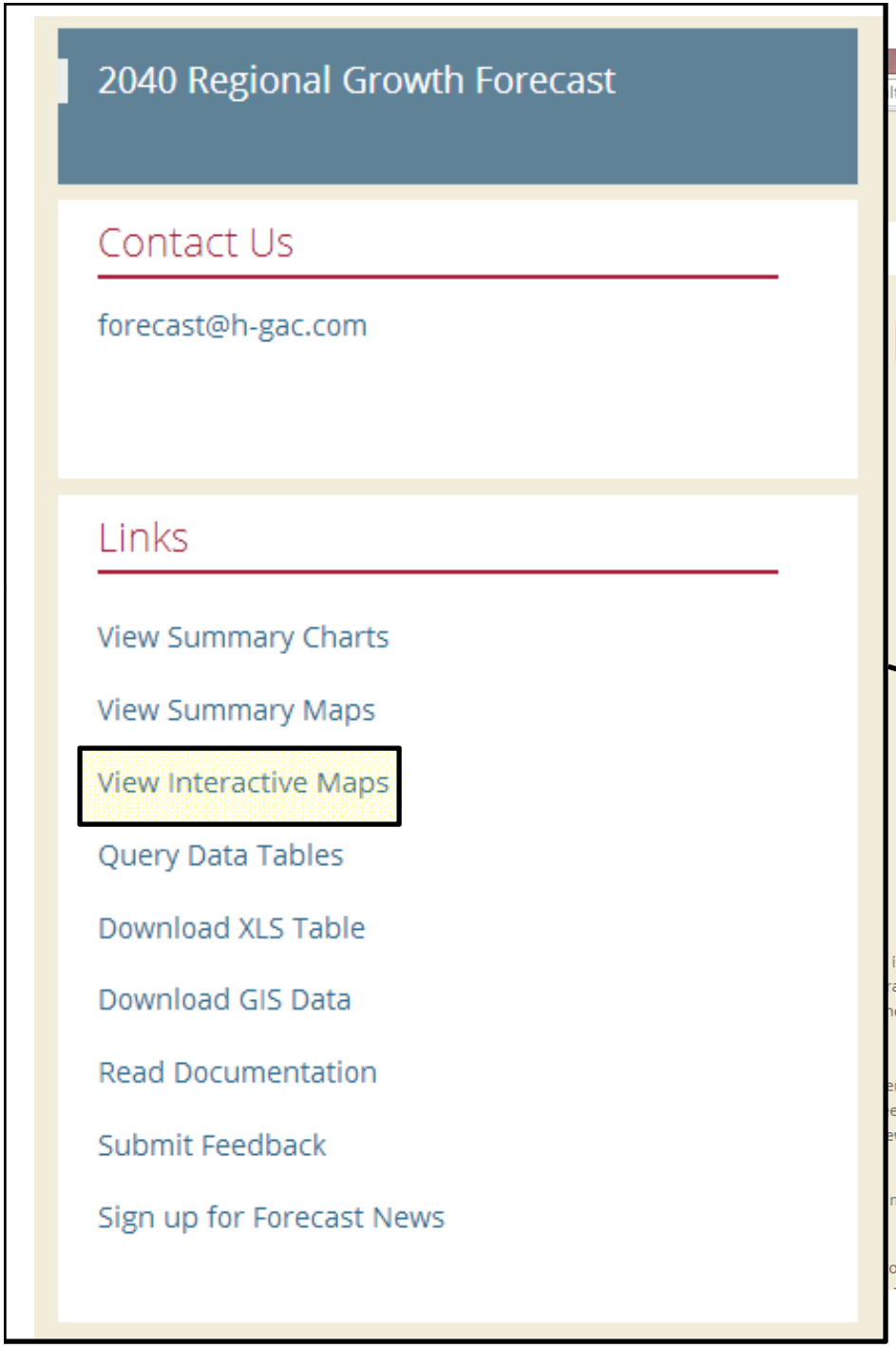
Posted: 07/16/2014
Census Update
Posted: 07/02/2014
Cypress Creek Parkway Livable Centers Study
Posted: 07/01/2014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Posted: 07/16/2014
Census Update
Posted: 07/02/2014
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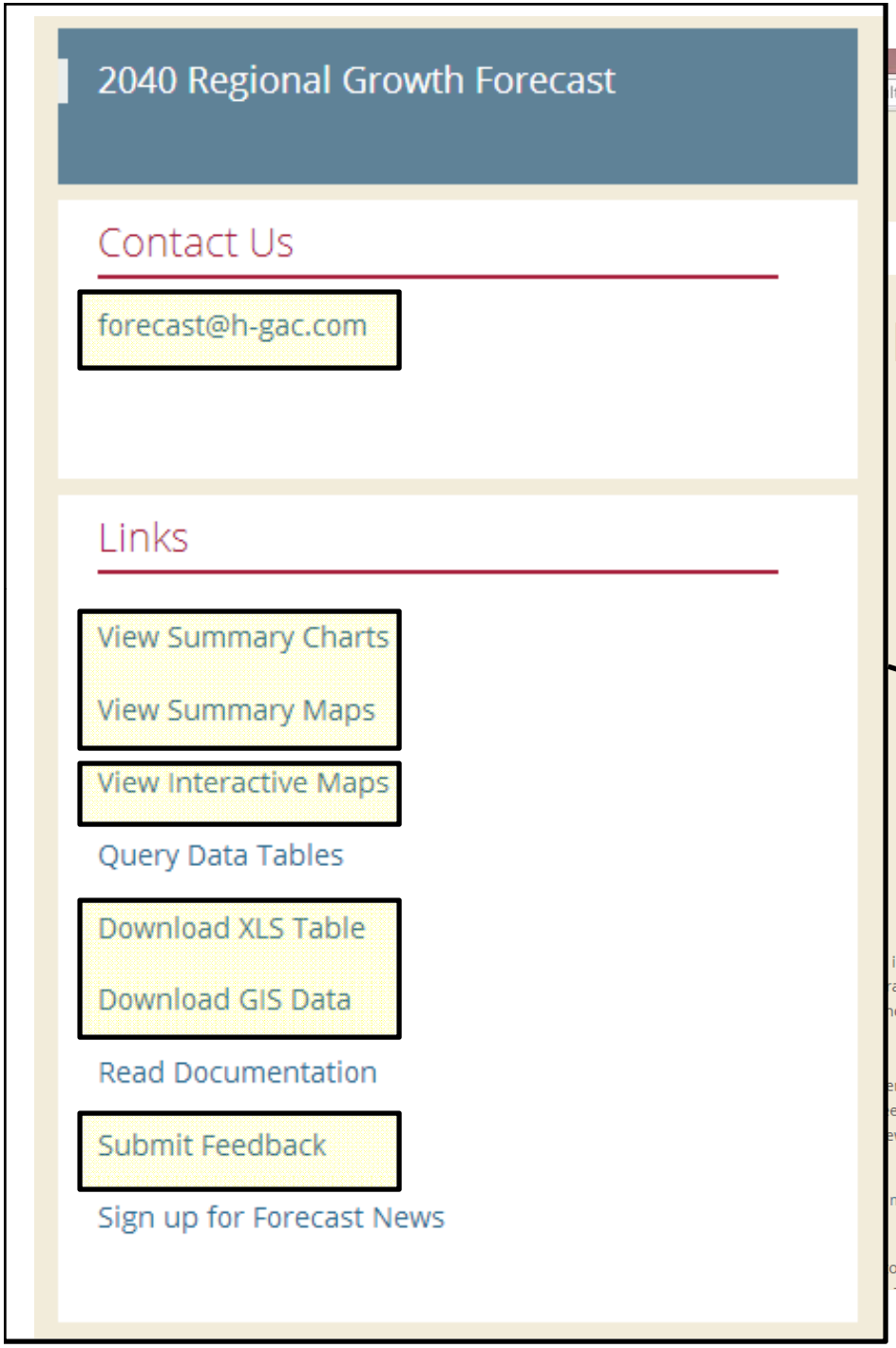
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spotlight on the

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