

Regional Economic Indicators- COVID-19

Socioeconomic Modeling Staff
Houston-Galveston Area Council

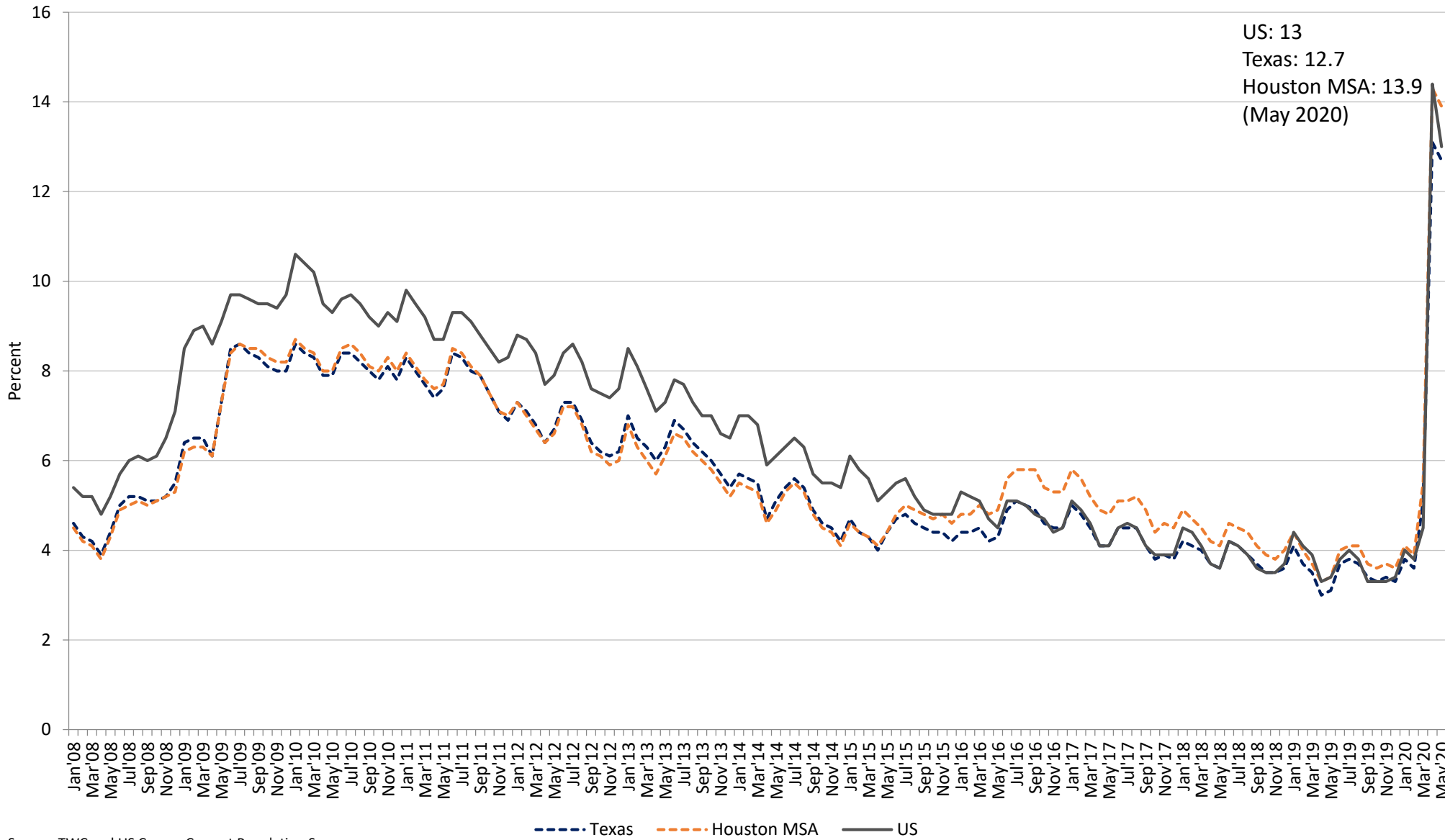


Index

- [Unemployment –](#) Slide 3
- [Residential Activity-](#) Slide 5
- [Commercial Activity Office-](#) Slide 13
- [Commercial Activity Retail-](#) Slide 17
- [Commercial Activity Industrial-](#) Slide 22
- [Airport Activity-](#) Slide 26
- [Tax Records-](#) Slide 28
- [Vulnerable Population-](#) Slide 32
- [Hospital Stats-](#) Slide 34
- [COVID19 County Mobility Stats-](#) Slide 38

Unemployment Rate

Monthly Unemployment Rate

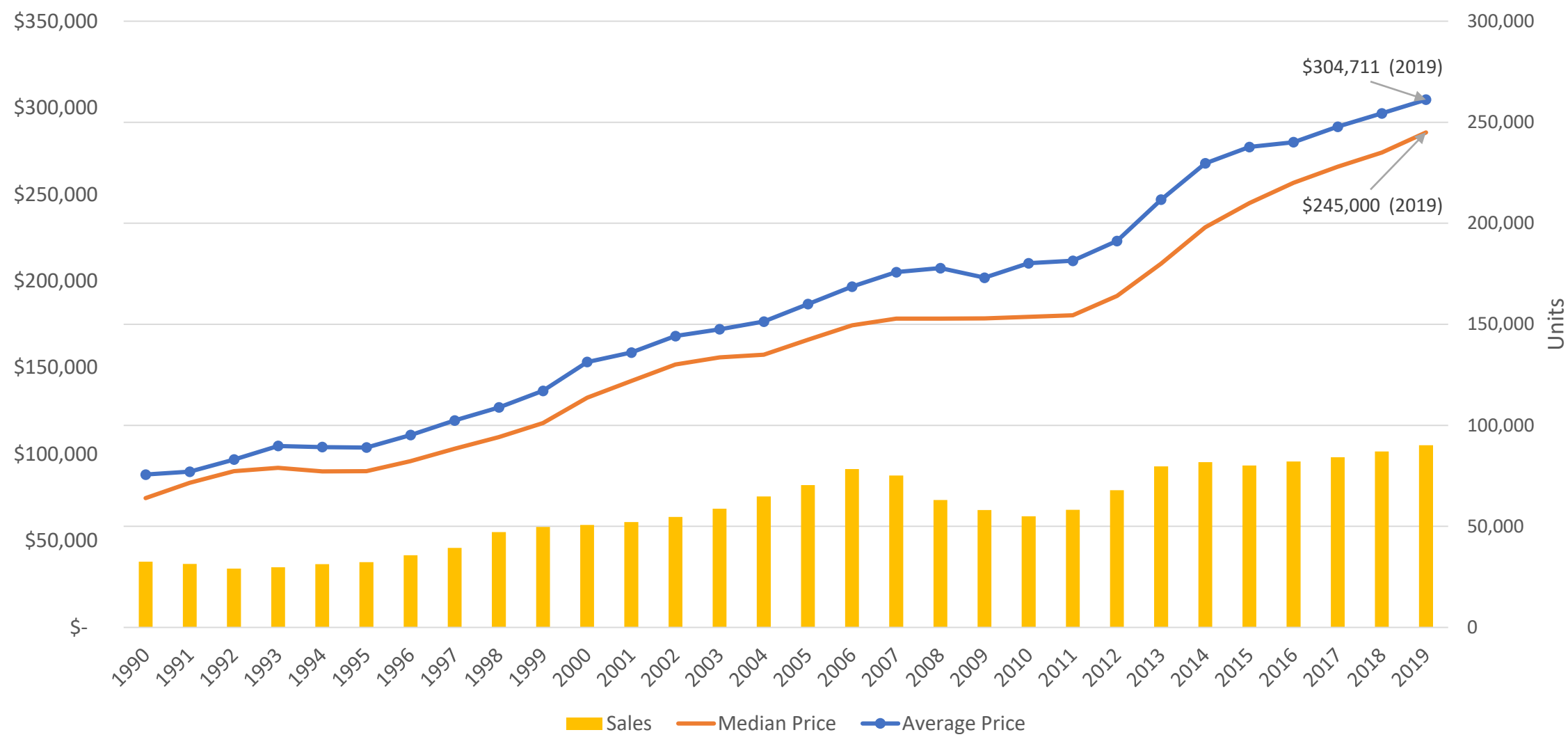


Source: TWC and US Census Current Population Survey

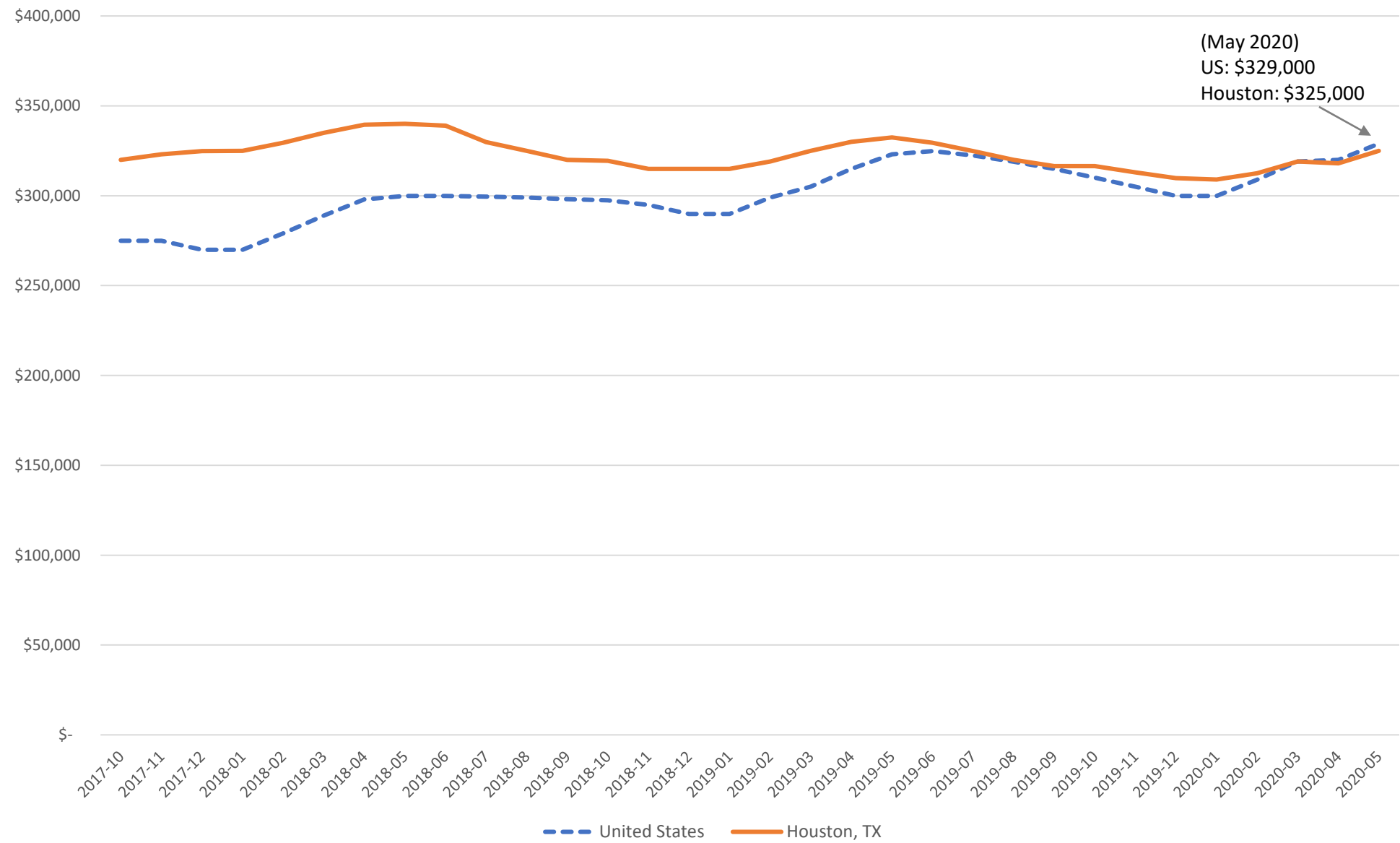
Residential Activity

Houston MLS Home Sales

Houston MSA

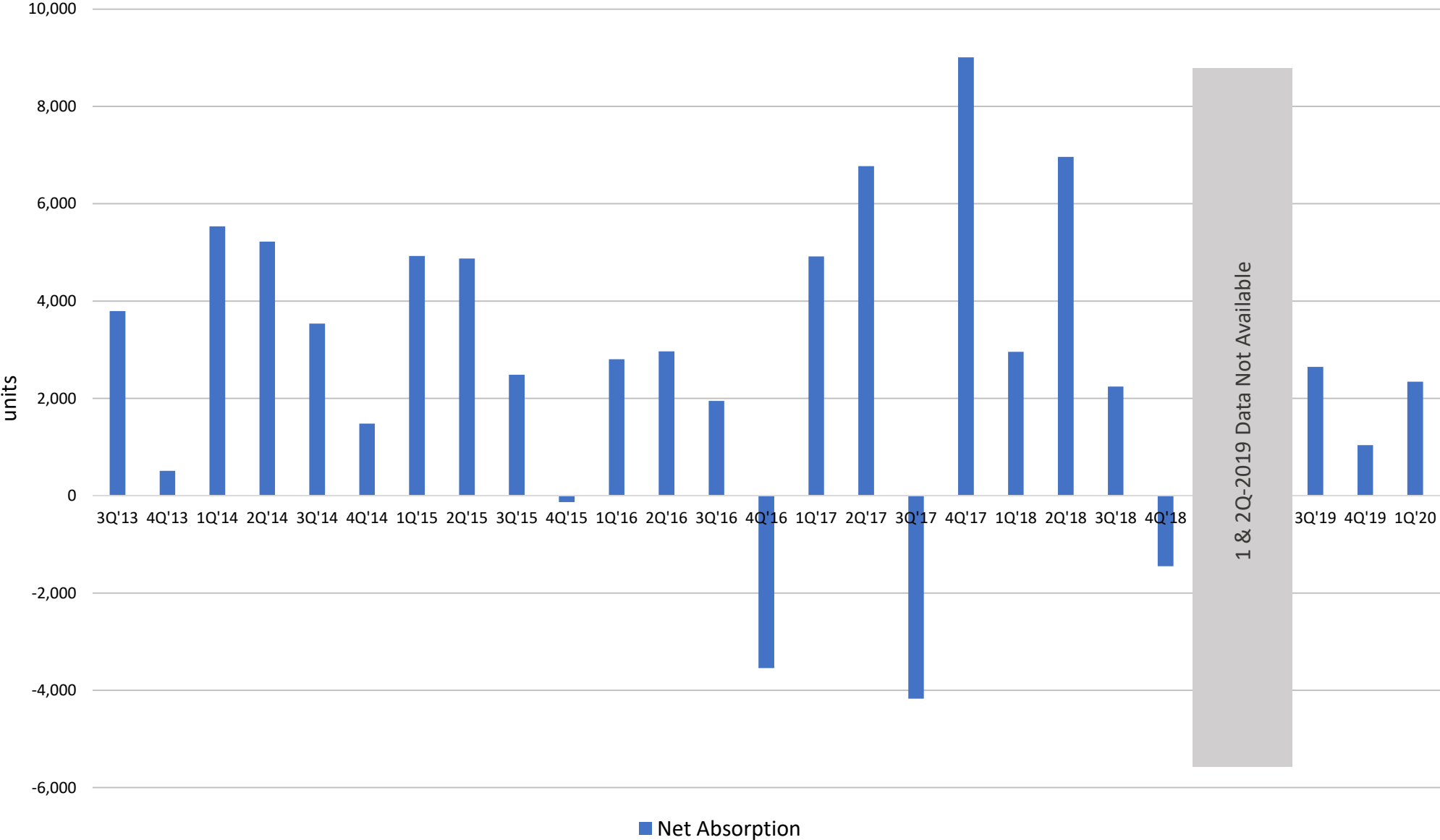


Monthly Median Listing Price



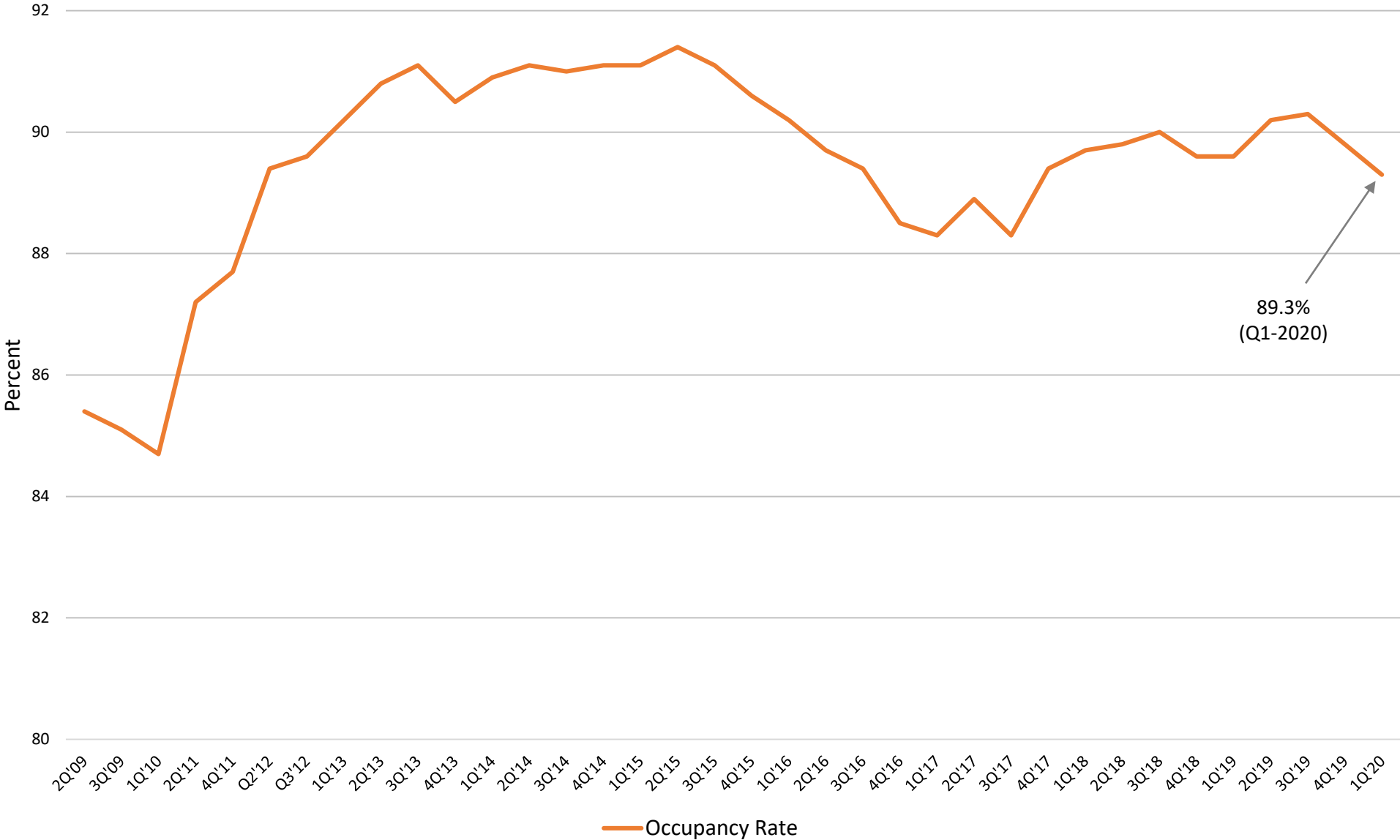
Quarterly Multi-Family Net Absorption

Houston Area



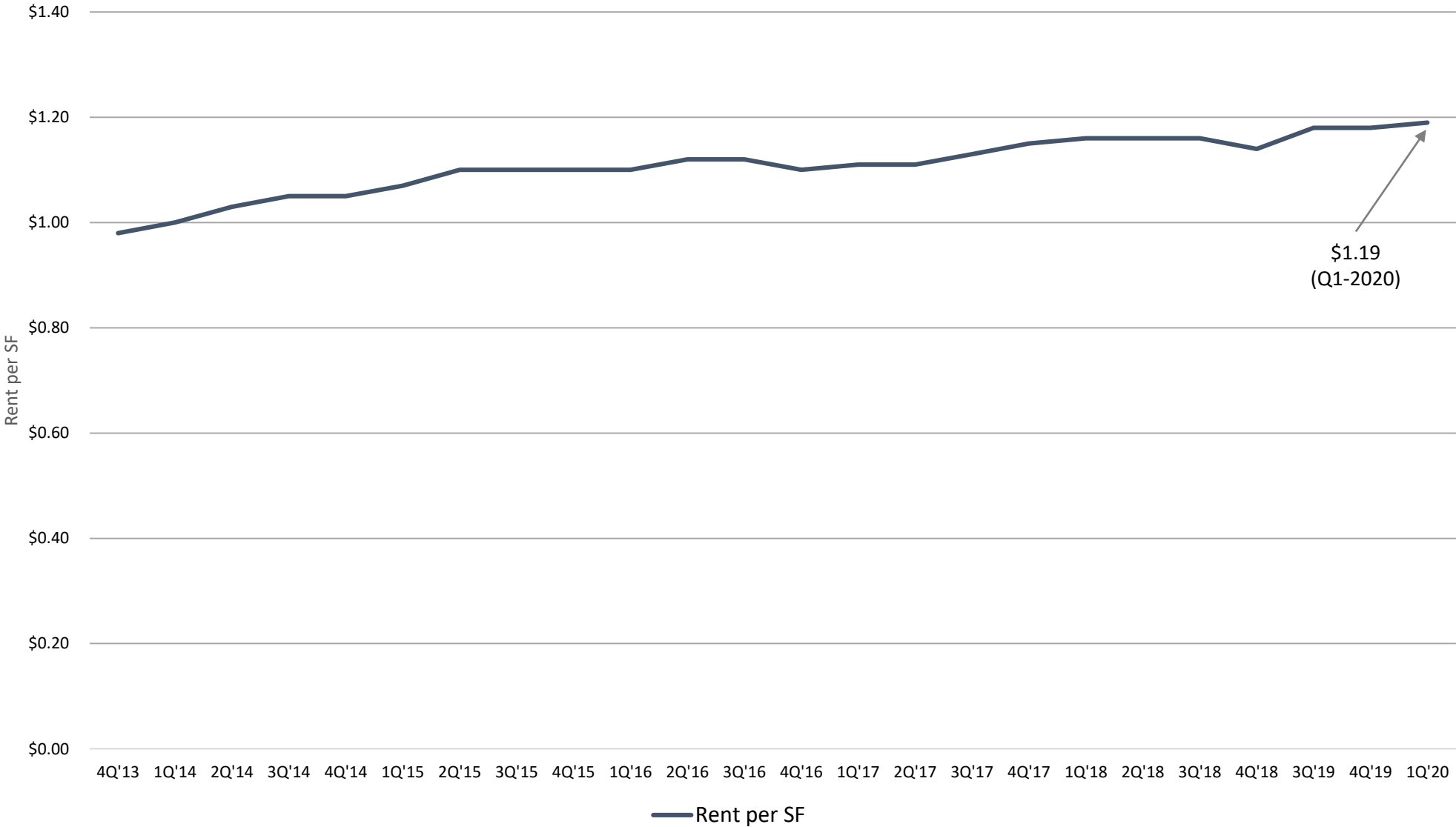
Quarterly Multi-Family Occupancy Rate

Houston Area



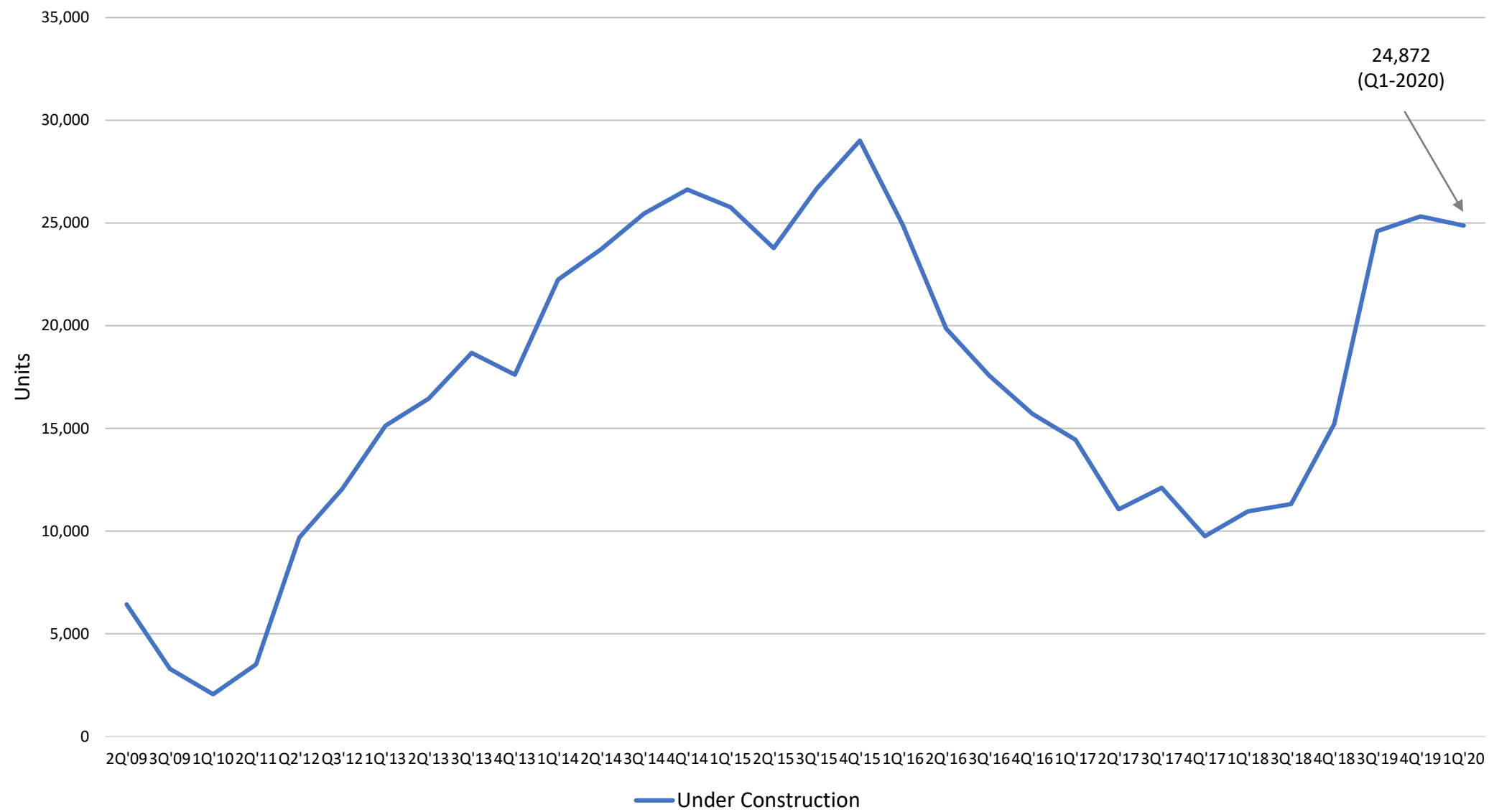
Quarterly Multi-Family Lease Rate (Rent per SF)

Houston Area

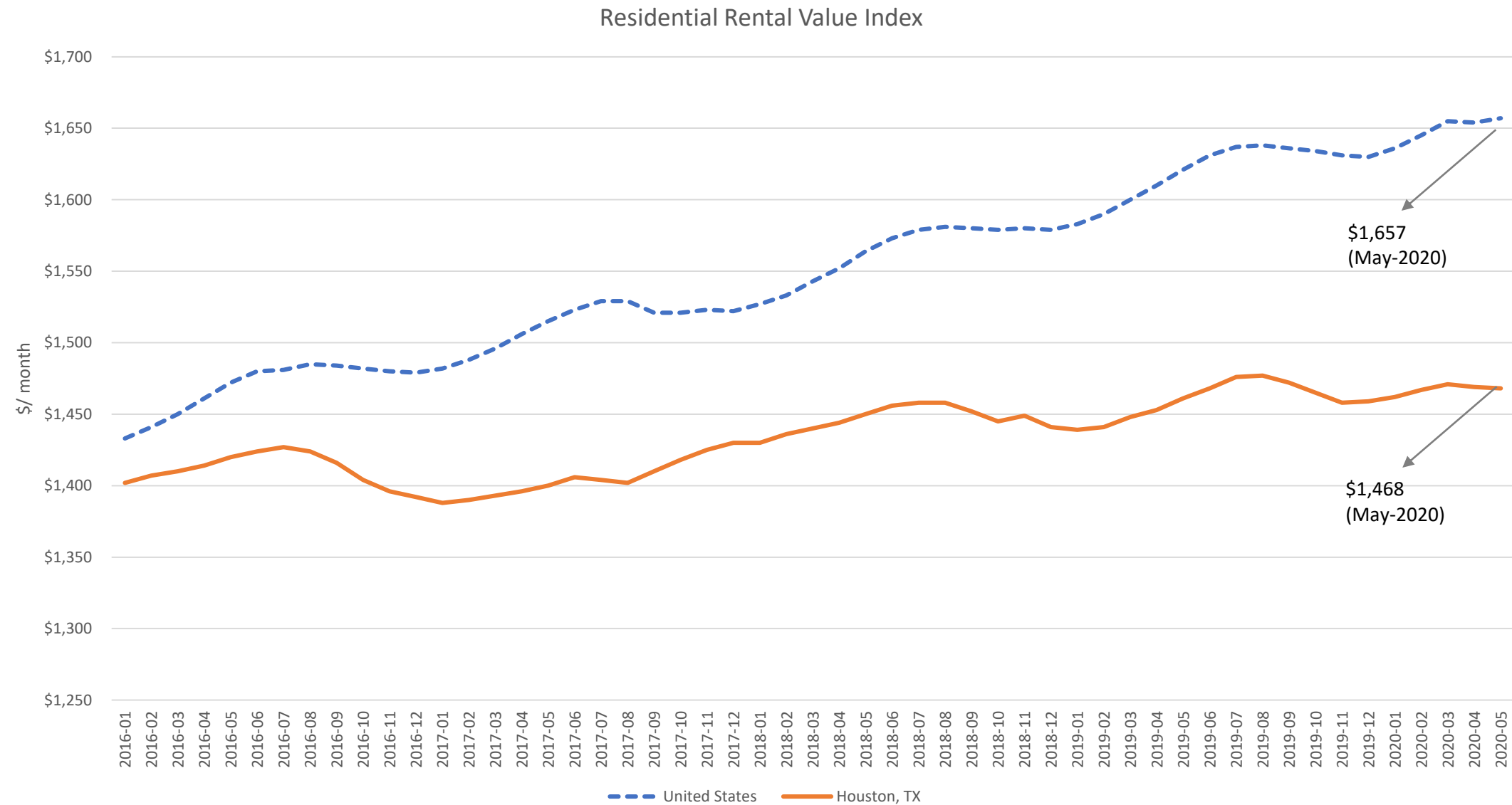


Quarterly Multi-Family Construction

Houston Area



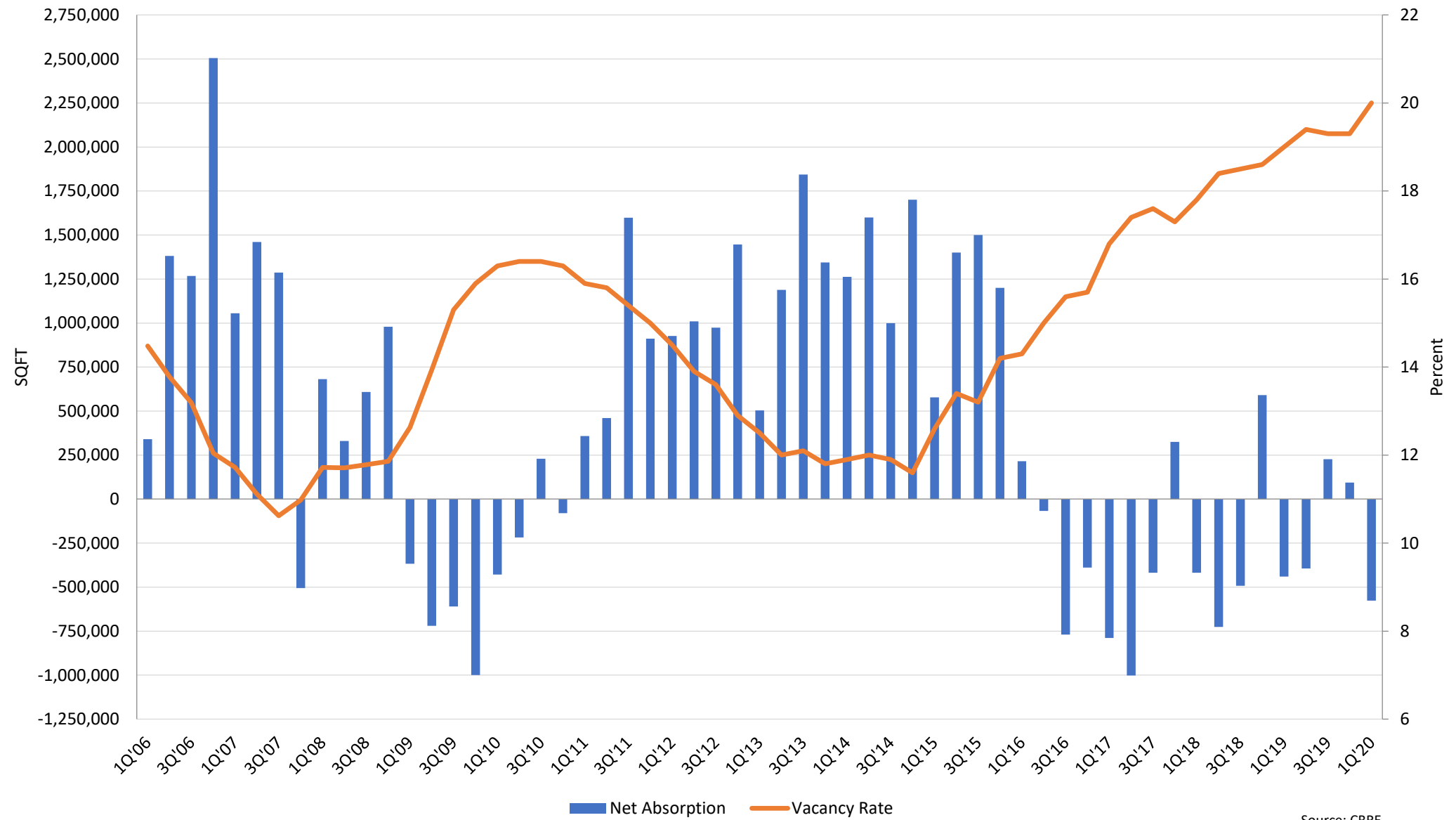
Monthly Residential Median Rental Value



Commercial Real Estate Activity Office

Quarterly Office Net Absorption & Vacancy Rate

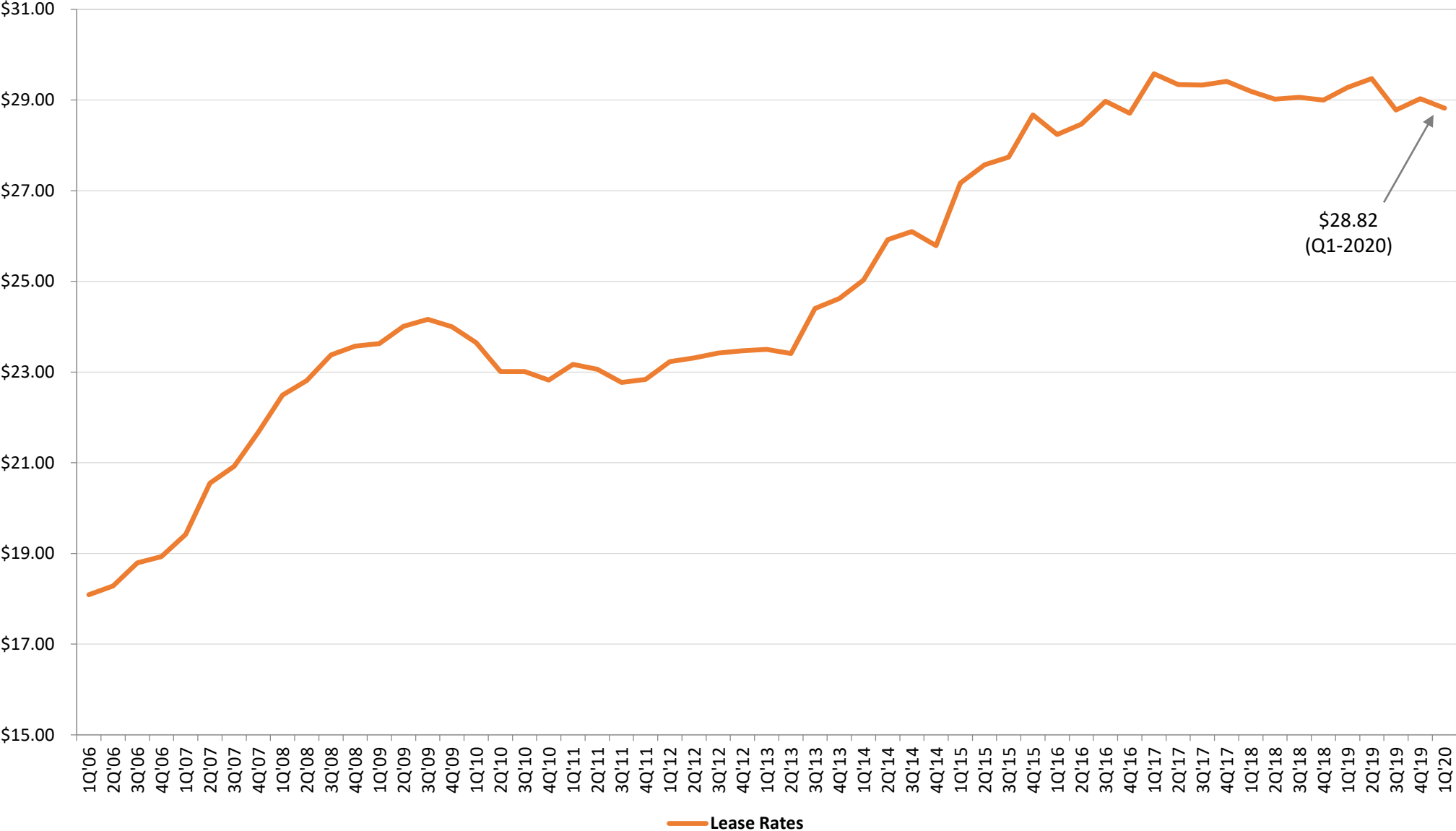
Houston Area



Source: CBRE

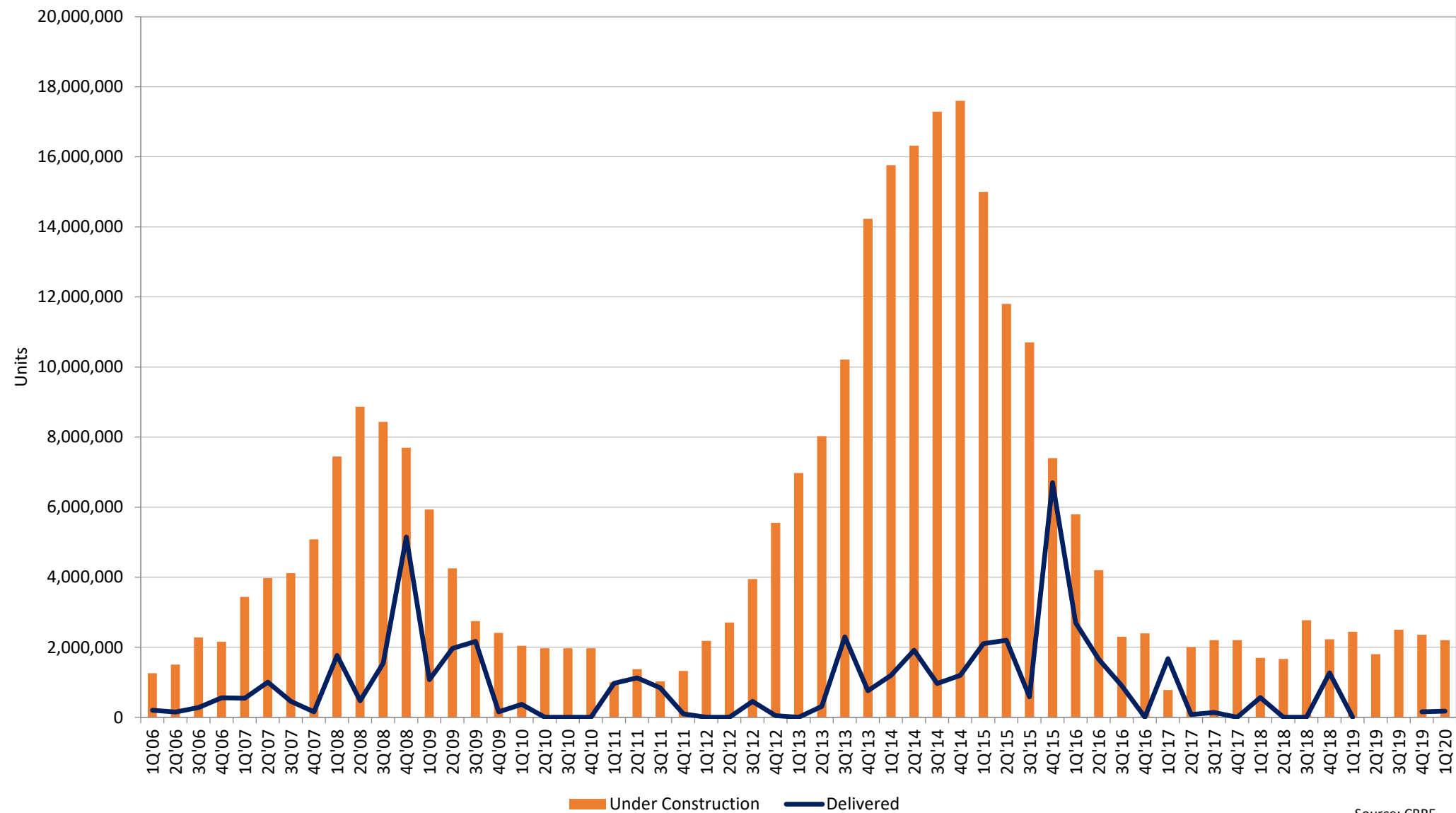
Quarterly Office Lease Rates

Houston Area



Quarterly Office Construction

Houston Area



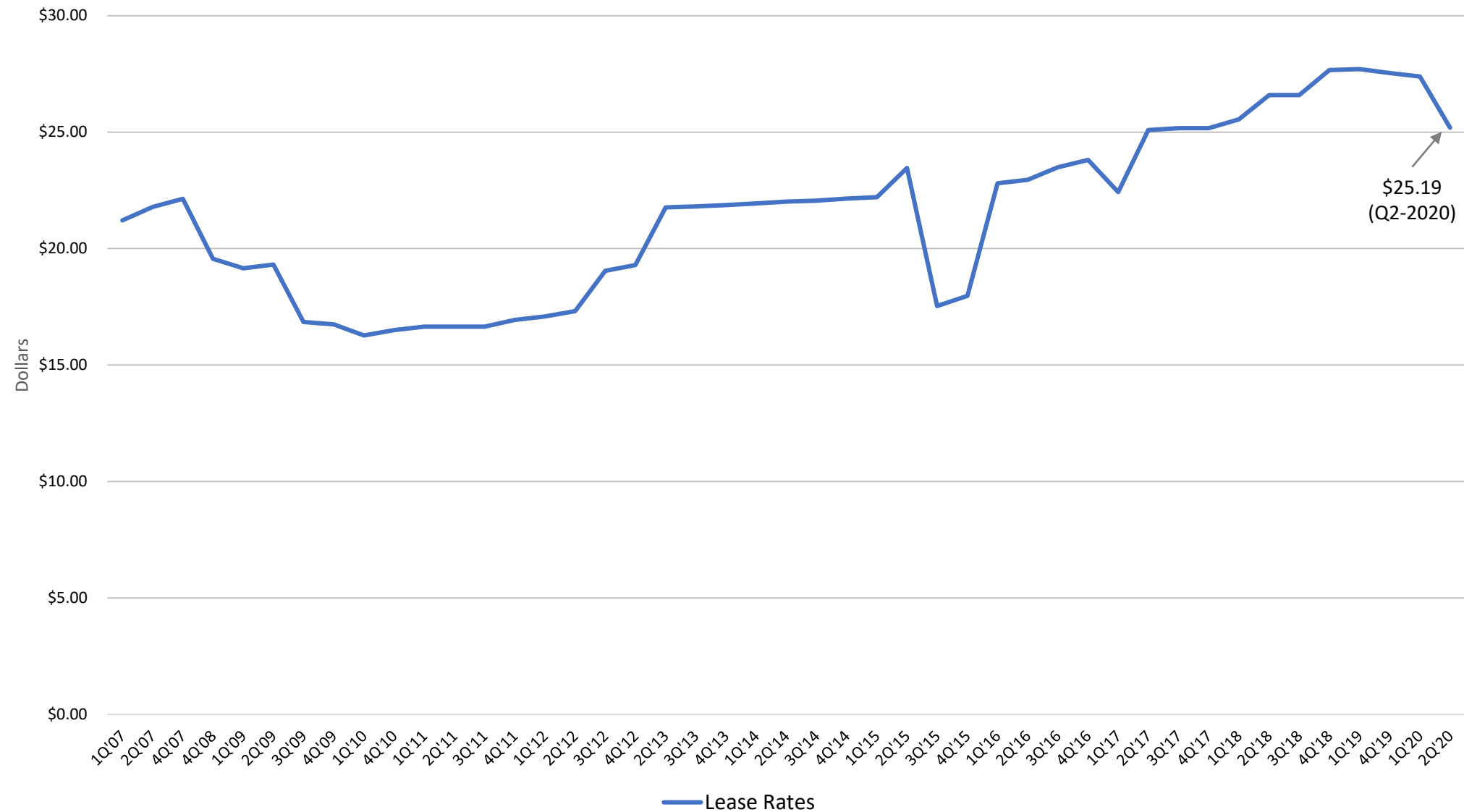
Source: CBRE

Commercial Real Estate Activity

Retail

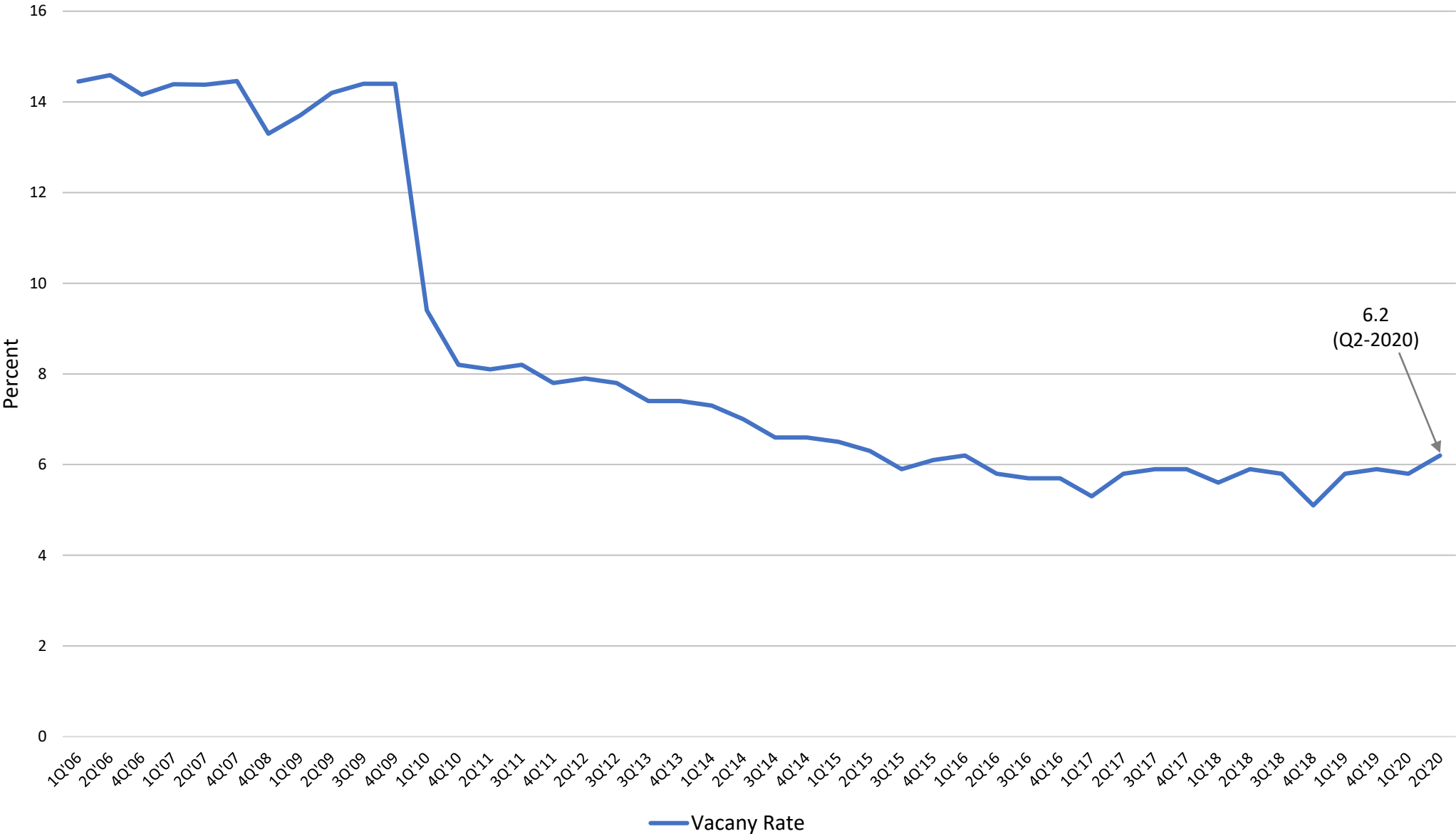
Quarterly Retail Lease Rate

Houston Area



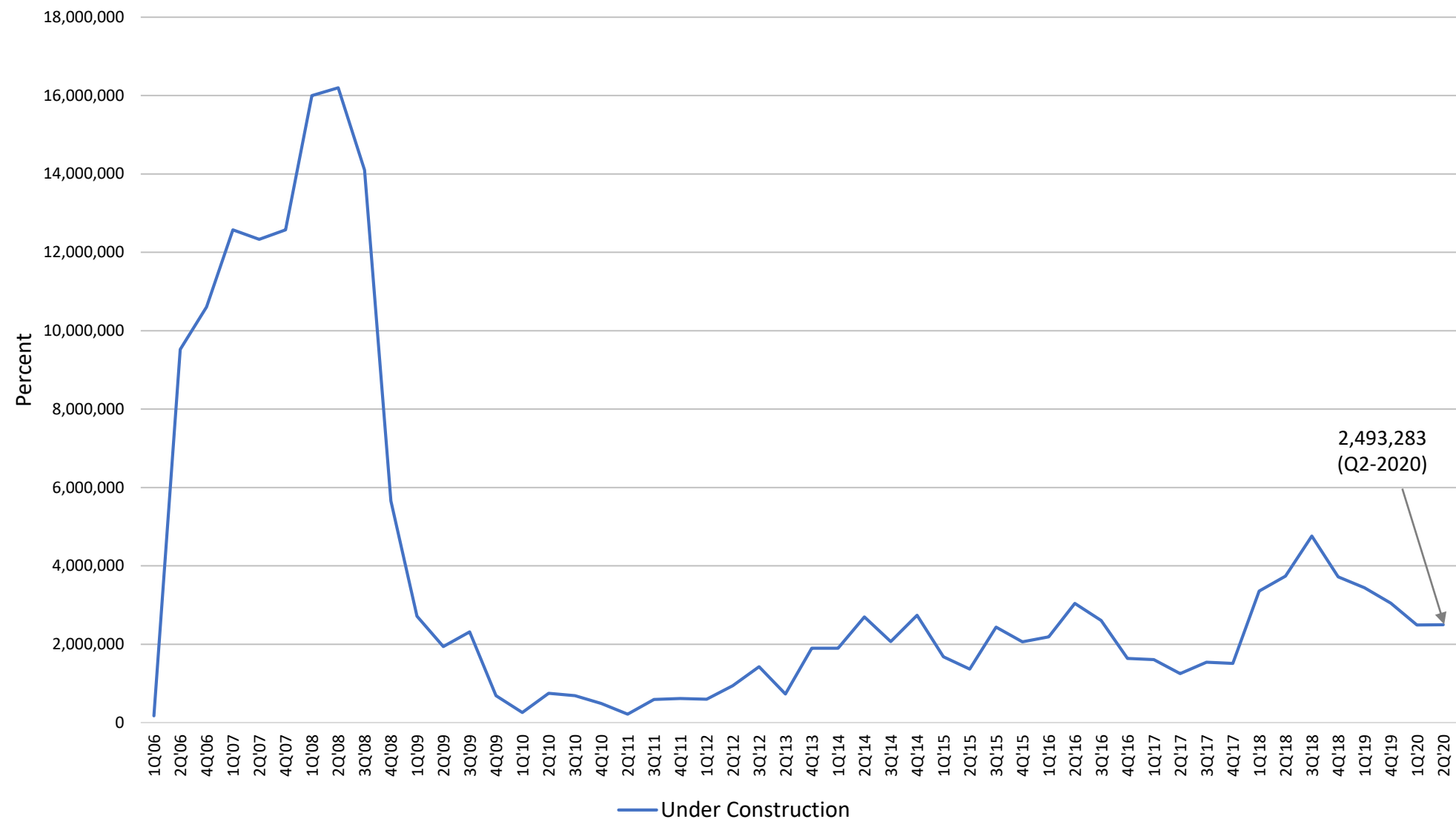
Quarterly Retail Vacancy Rate

Houston Area



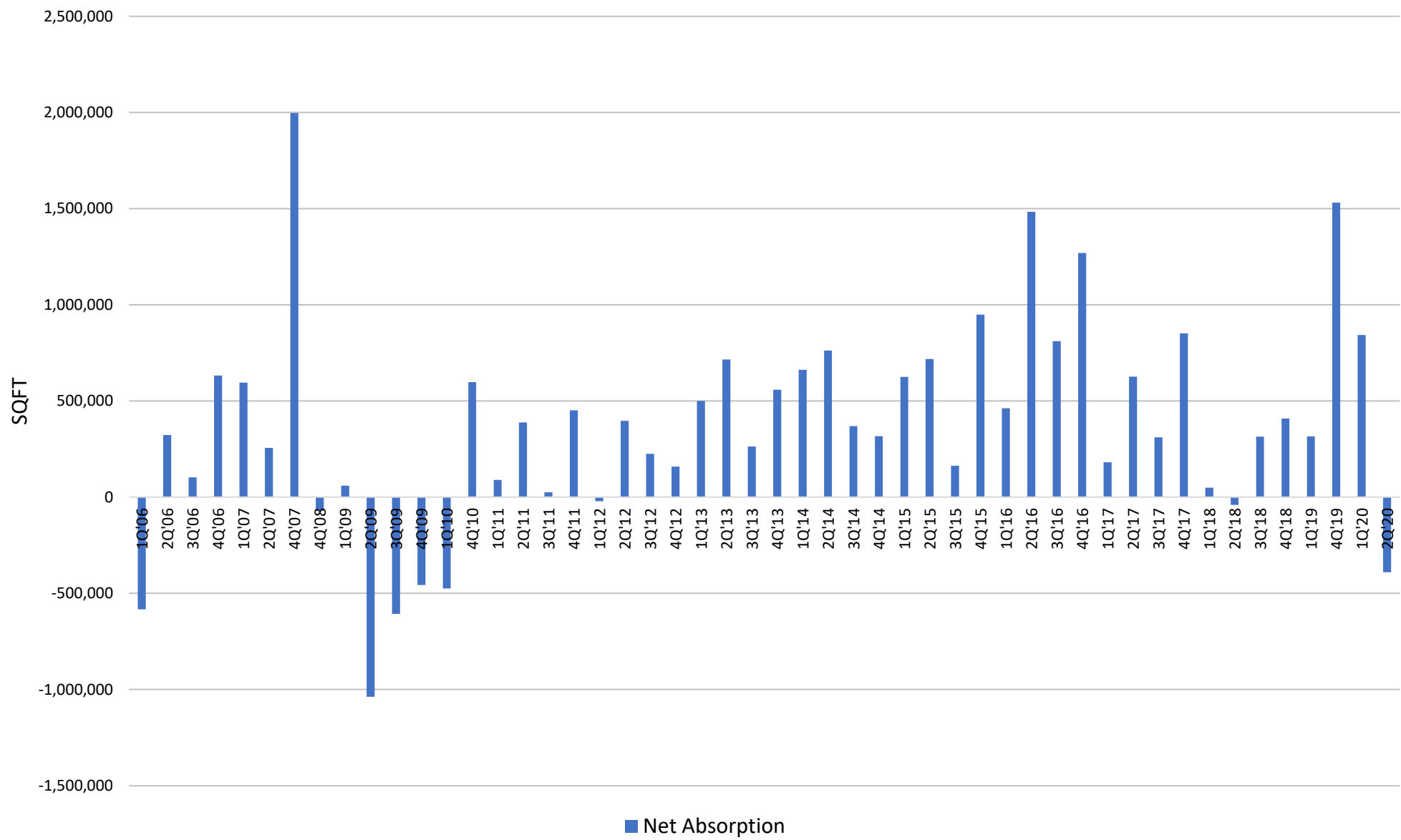
Quarterly Retail Construction

Houston Area



Quarterly Retail Net Absorption

Houston Area

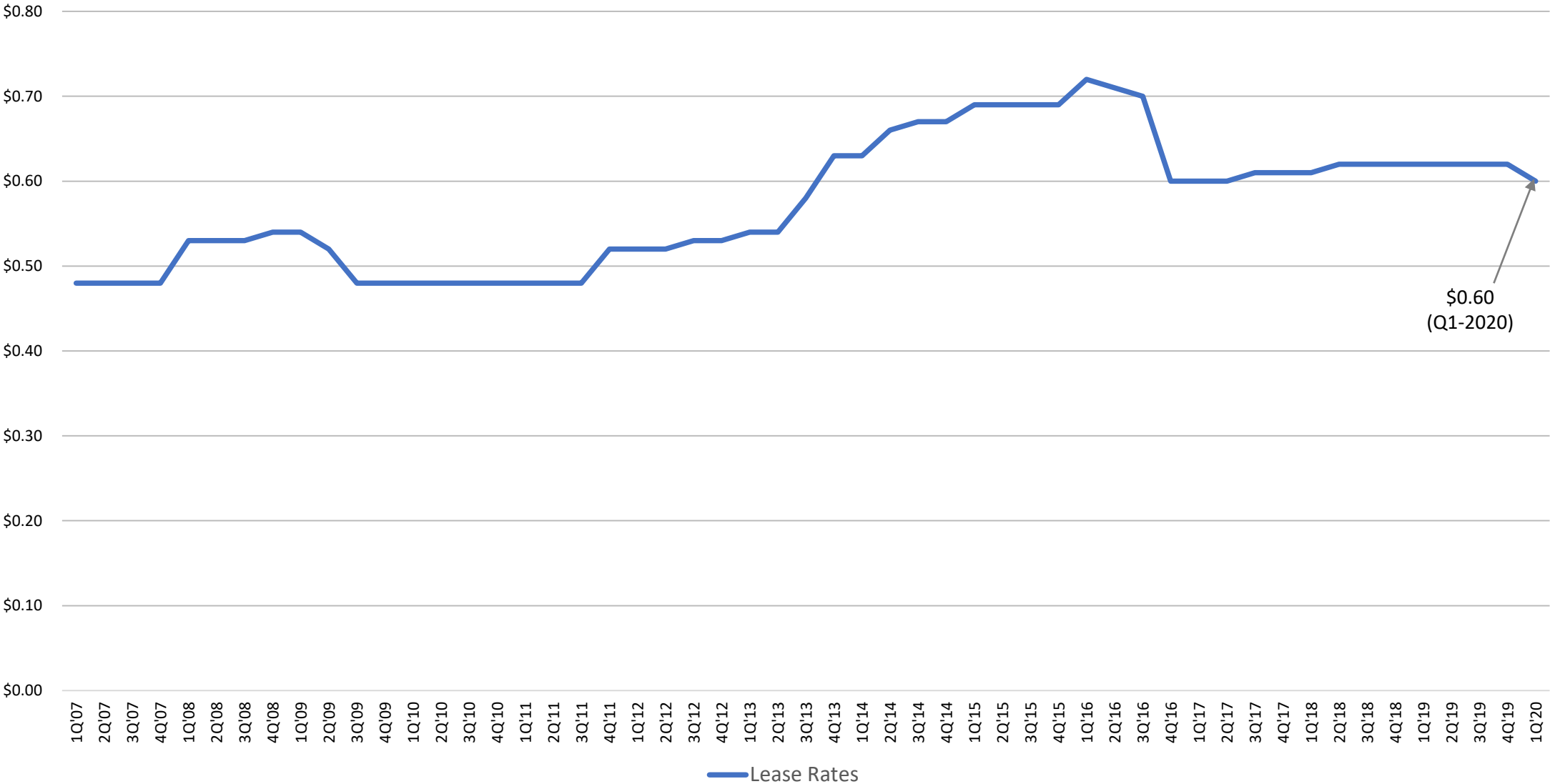


Commercial Real Estate Activity

Industrial

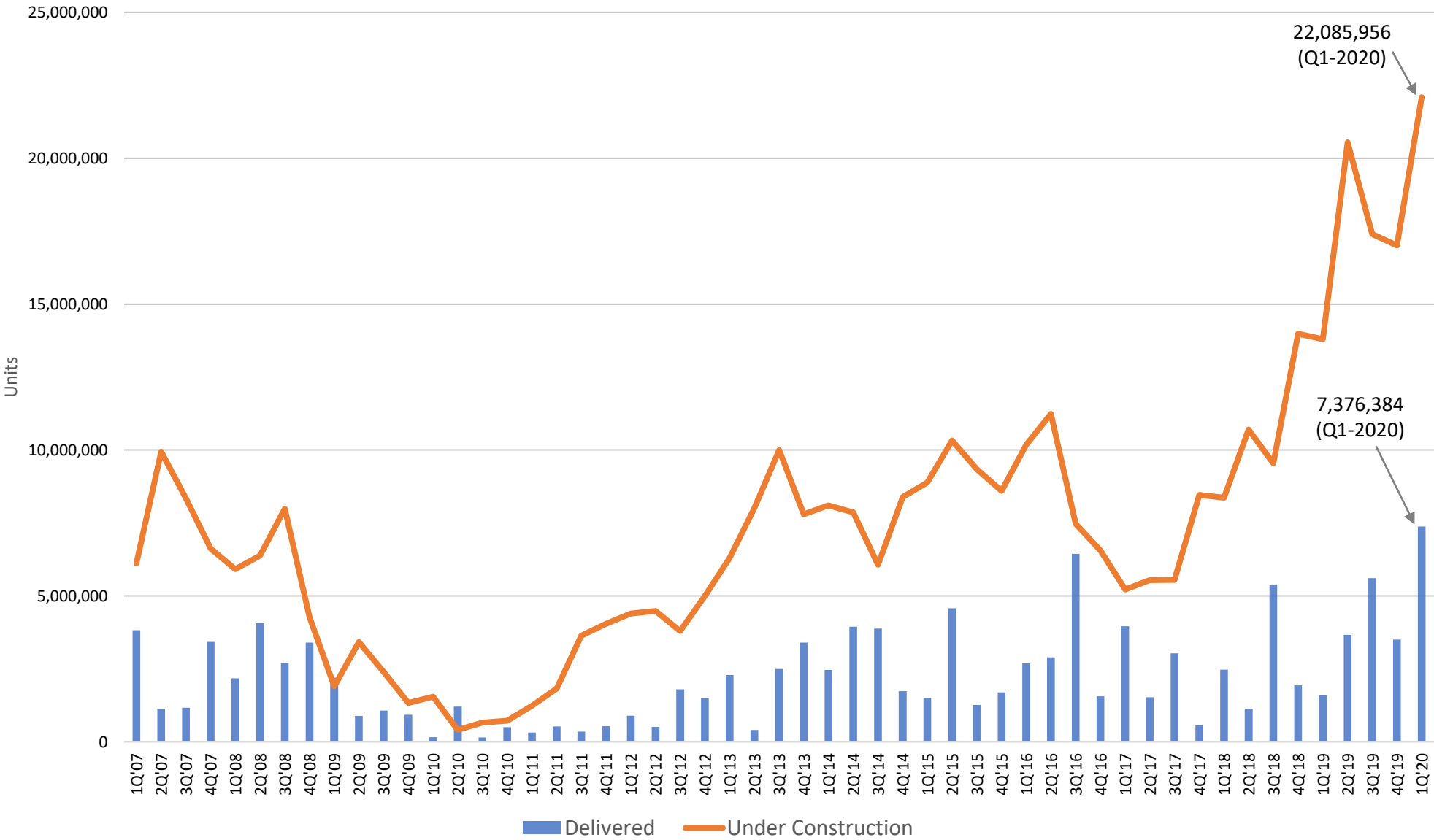
Quarterly Industrial Lease Rates

Houston Area



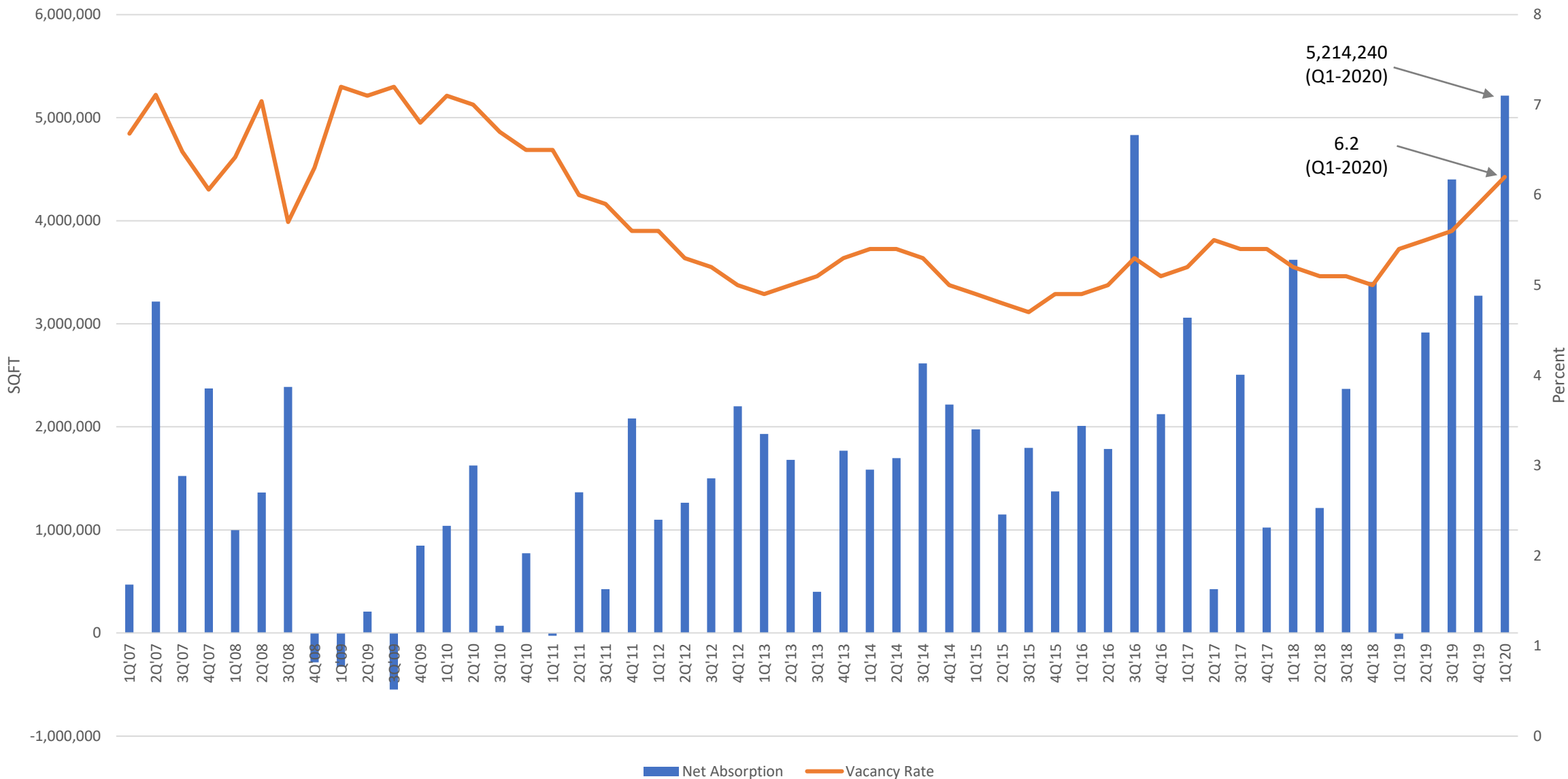
Quarterly Industrial Construction

Houston Area



Quarterly Industrial Net Absorption & Vacancy Rate

Houston Area

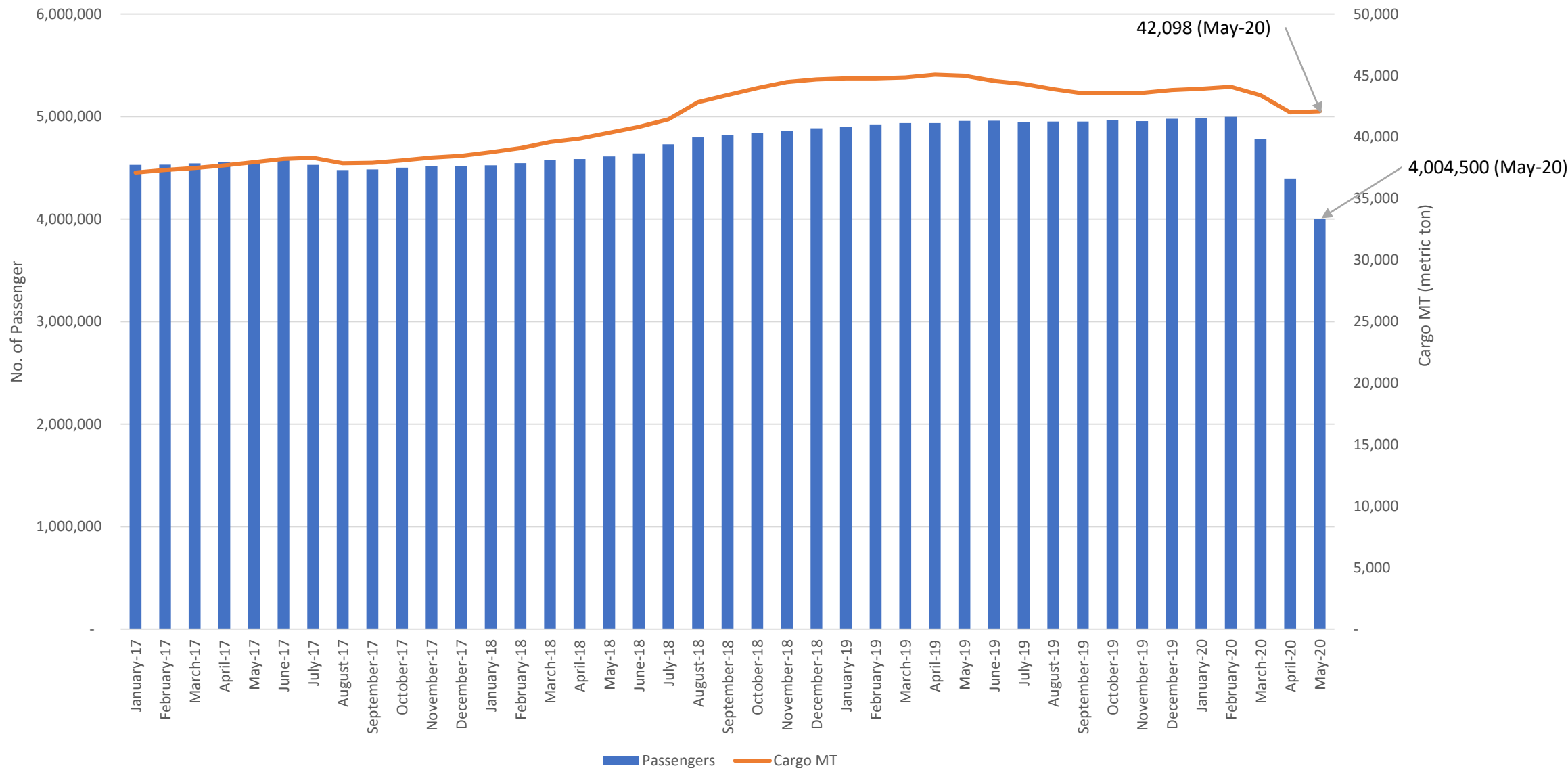


5,214,240
(Q1-2020)

6.2
(Q1-2020)

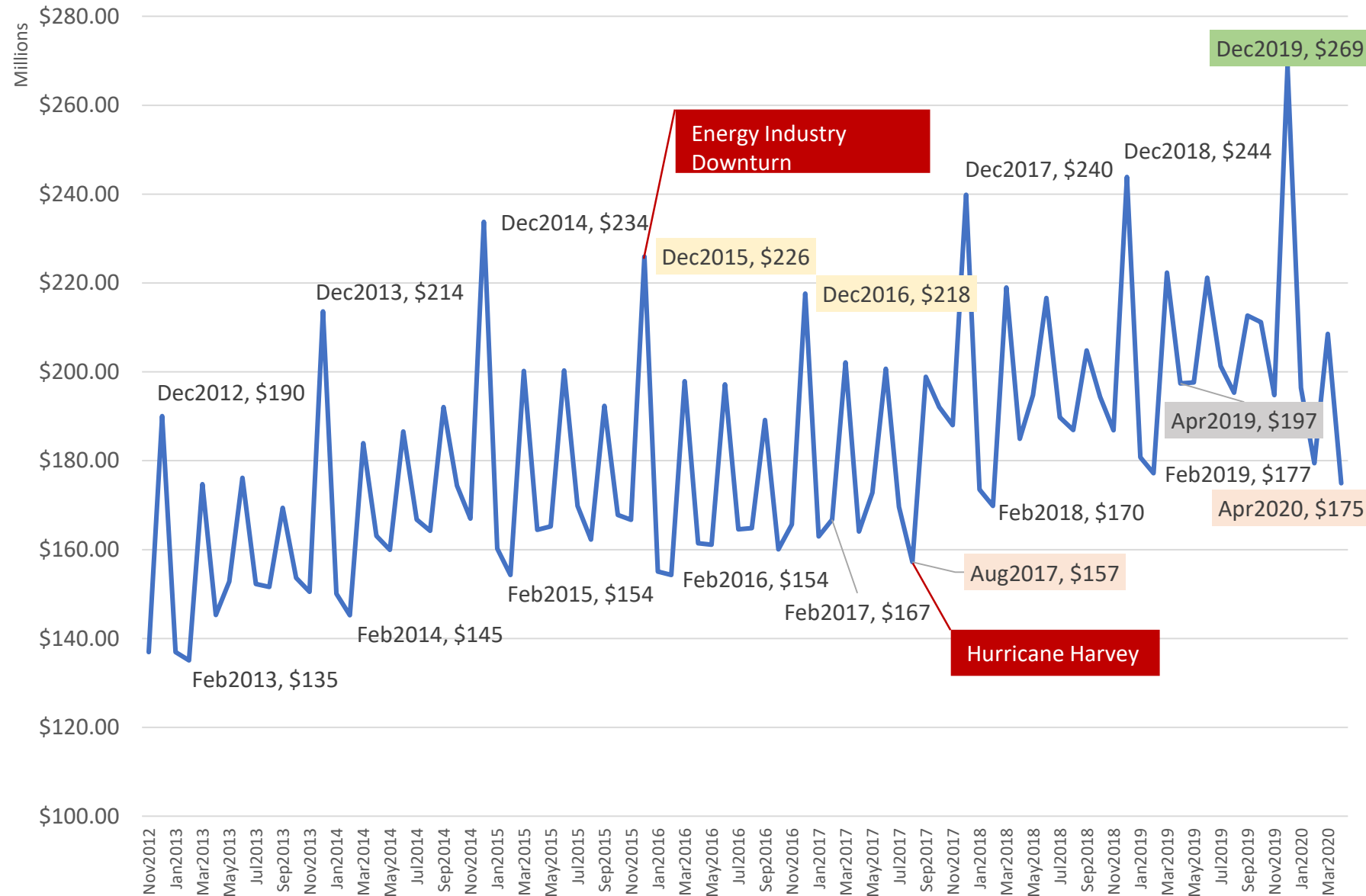
Airport Activity

Houston Airport System (HAS) Statistics: Recent 12 Months Moving Average (Passengers & Cargo MT)



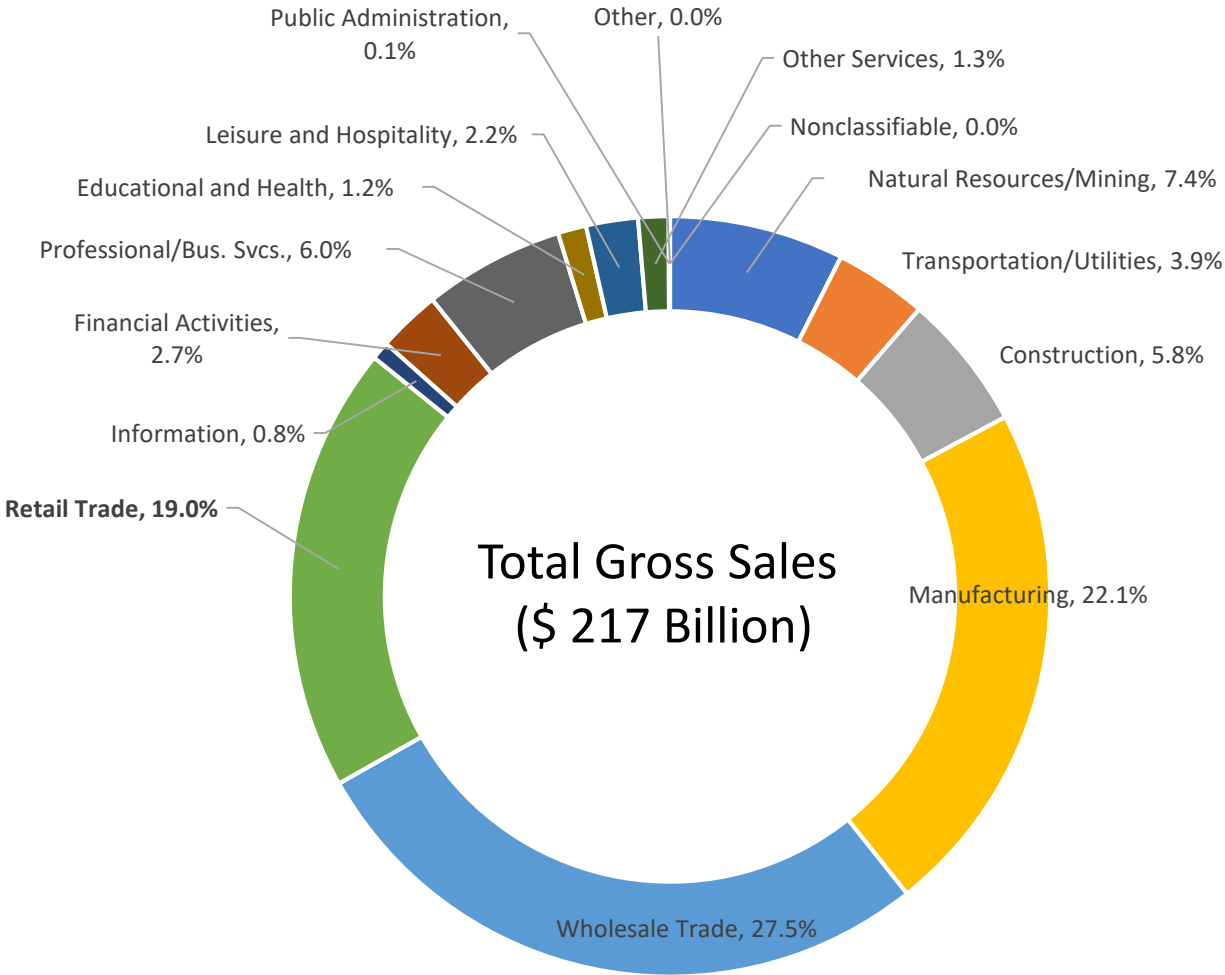
Tax Records

H-GAC Region Monthly Sales Tax Revenue



Detailed Retail Trade

	2018 4th Qtr.	2019 4th Qtr.	Change (%)
Total Retail Trade	\$ 36,236 Million	\$ 41,263 Million	13.9%
Motor Vehicles	\$ 7,165 Million	\$ 9,854 Million	37.5%
Home Furnishings	\$ 977 Million	\$ 955 Million	-2.3%
Electronics/Appliance	\$ 1,552 Million	\$ 1,435 Million	-7.6%
Building Materials	\$ 2,150 Million	\$ 2,143 Million	-0.3%
Food and Beverage	\$ 4,659 Million	\$ 4,880 Million	4.7%
Health and Personal	\$ 2,281 Million	\$ 2,081 Million	-8.7%
Gasoline Stations	\$ 7,335 Million	\$ 6,425 Million	-12.4%
Clothing Stores	\$ 1,800 Million	\$ 1,784 Million	-0.9%
Sport/Hobby/Books	\$ 619 Million	\$ 624 Million	0.8%
General Merchandise	\$ 3,829 Million	\$ 3,821 Million	-0.2%
Miscellaneous Stores	\$ 2,856 Million	\$ 6,151 Million	115.4%
Non-store, Other	\$ 1,013 Million	\$ 1,110 Million	9.7%



H-GAC 13-county Property Value Changes (2016-2018)

H-GAC 13-County

** \$ value in million*

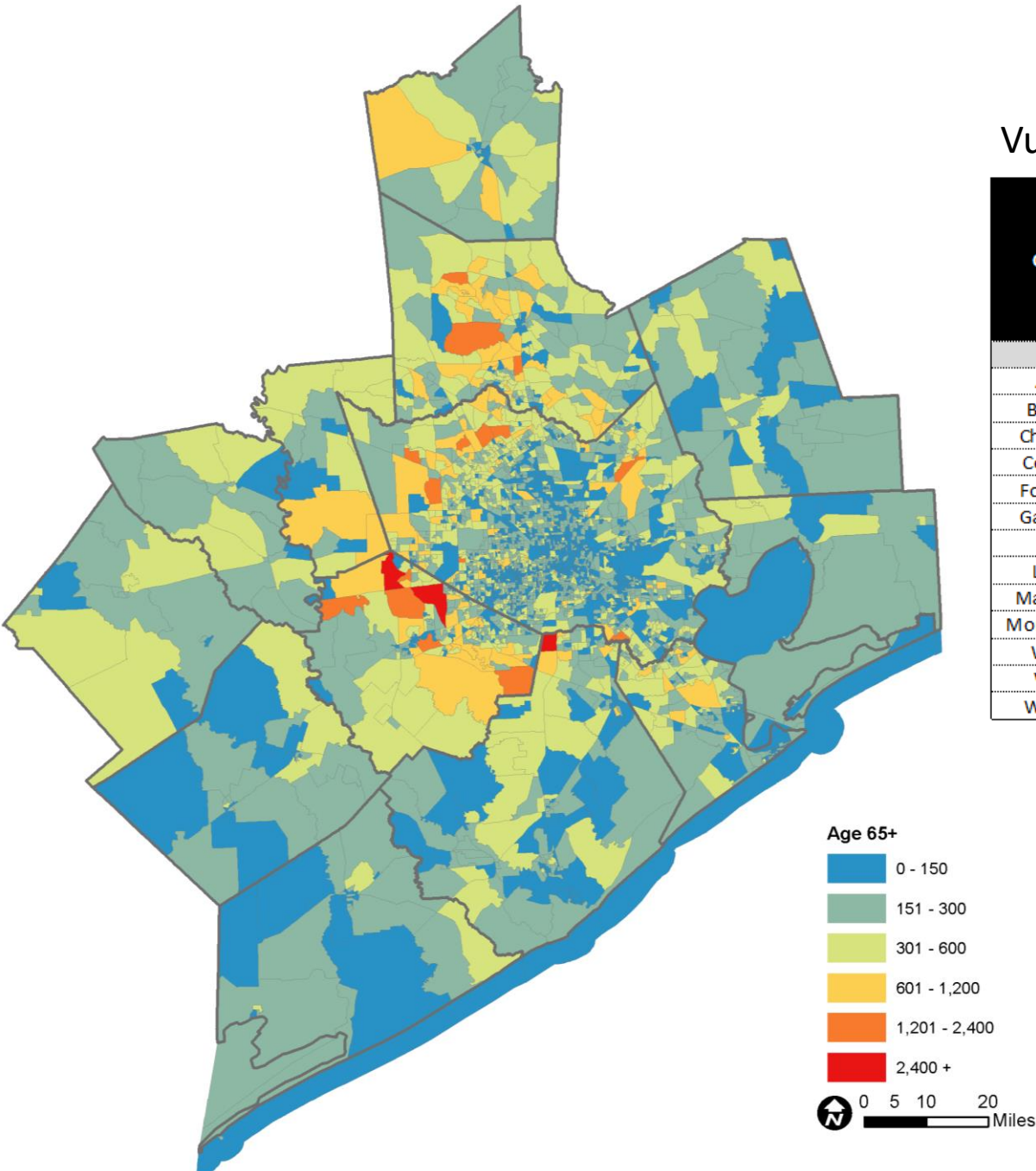
County	Market Values (2016)	Total Levy* (2016)	Market Values (2017)	Total Levy (2017)	Market Values (2018)	Total Levy (2018)	Market Value Change (%)	Levy Change (%)
Total	\$758,778	\$2,739	\$796,029	\$2,856	\$822,907	\$2,936	8.5%	7.2%
Austin	\$5,229	\$19	\$5,825	\$16	\$6,347	\$33	21.4%	72.6%
Brazoria	\$36,329	\$120	\$41,001	\$124	\$46,196	\$128	27.2%	6.6%
Chambers	\$12,425	\$40	\$14,647	\$69	\$16,130	\$47	29.8%	18.2%
Colorado	\$4,756	\$11	\$5,100	\$11	\$5,397	\$12	13.5%	7.5%
Fort Bend	\$77,265	\$280	\$81,586	\$292	\$85,053	\$298	10.1%	6.6%
Galveston	\$31,883	\$144	\$34,248	\$153	\$34,630	\$152	8.6%	5.6%
Harris	\$502,023	\$1,764	\$519,113	\$1,839	\$529,092	\$1,889	5.4%	7.1%
Liberty	\$6,447	\$30	\$7,105	\$33	\$7,555	\$35	17.2%	17.6%
Matagorda	\$6,166	\$18	\$6,854	\$19	\$7,513	\$19	21.8%	4.0%
Montgomery	\$59,712	\$254	\$62,200	\$237	\$65,696	\$253	10.0%	-0.3%
Walker	\$4,540	\$19	\$4,946	\$20	\$5,259	\$21	15.8%	9.1%
Waller	\$6,801	\$25	\$7,711	\$27	\$8,050	\$33	18.4%	30.2%
Wharton	\$5,202	\$16	\$5,693	\$17	\$5,988	\$16	15.1%	0.6%

* A "levied property tax" is a tax imposed on property owners, based on the value of their property and the municipal government's needs.

Vulnerable Population

Vulnerable Population (2018)

County	Total population (2018)	Total households (2018)	Elderly (65+)	%	Elderly (75+)	%	Car-less	%	Population in Poverty	%
Total	6,949,959	2,368,252	732,841	10.5%	273,929	3.9%	123,480	5.2%	981,475	14.3%
Austin	29,565	11,041	5,394	18.2%	2,151	7.3%	490	4.4%	3,159	10.8%
Brazoria	353,999	118,762	39,980	11.3%	15,201	4.3%	3,768	3.2%	31,553	9.2%
Chambers	40,292	13,529	4,408	10.9%	1,577	3.9%	588	4.3%	5,072	12.7%
Colorado	21,022	7,511	4,463	21.2%	1,996	9.5%	405	5.4%	2,242	10.8%
Fort Bend	739,342	230,381	74,854	10.1%	25,231	3.4%	5,052	2.2%	57,565	7.8%
Galveston	327,089	119,181	44,264	13.5%	17,023	5.2%	6,450	5.4%	42,158	13.2%
Harris	4,602,523	1,583,486	452,327	9.8%	169,956	3.7%	95,285	6.0%	739,100	16.2%
Liberty	81,862	26,203	10,537	12.9%	3,934	4.8%	1,617	6.2%	11,047	14.8%
Matagorda	36,743	13,636	5,900	16.1%	2,686	7.3%	824	6.0%	7,293	20.1%
Montgomery	554,445	192,823	69,473	12.5%	25,556	4.6%	6,577	3.4%	54,526	9.9%
Walker	71,539	21,636	8,717	12.2%	3,520	4.9%	972	4.5%	12,881	24.1%
Waller	49,987	14,807	5,757	11.5%	2,060	4.1%	534	3.6%	7,697	16.9%
Wharton	41,551	15,256	6,767	16.3%	3,038	7.3%	918	6.0%	7,182	17.5%



Regional Hospitals

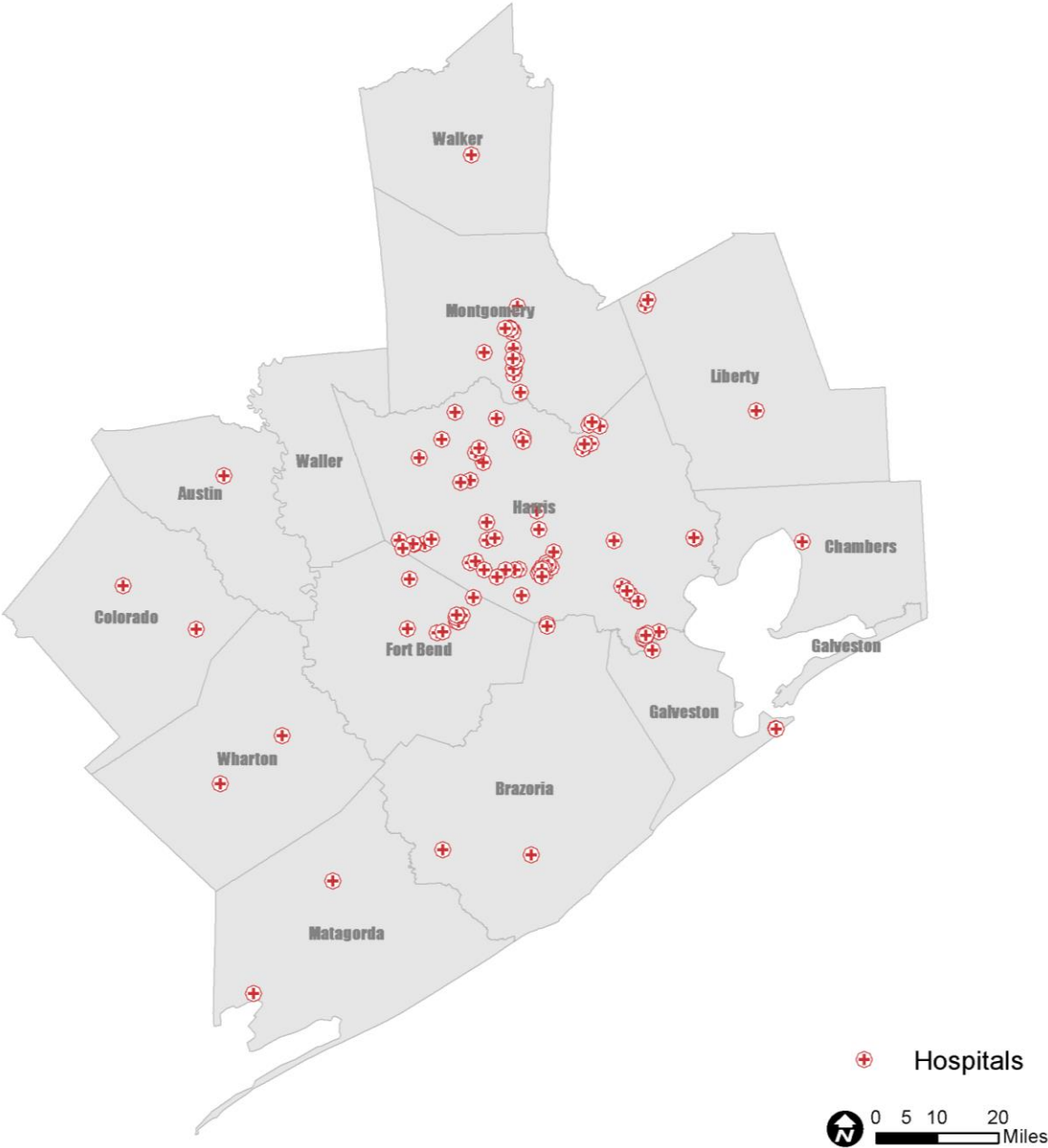
Hospitals for H-GAC 13 counties

County	Population	Households	No. of Hospitals	No. of Licensed Beds	No. of Staffed Beds	No. of ICU Beds	Potential Increase In Bed Capacity
Total	6,949,959	2,368,252	122	19,712	16,802	1,330	2910
Austin	29,565	11,041	1	30	32		-2
Brazoria	353,999	118,762	4	267	183	16	84
Chambers	40,292	13,529	1	14	14		0
Colorado	21,022	7,511	2	65	61		4
Fort Bend	739,342	230,381	11	1,135	1,062	114	73
Galveston	327,089	119,181	3	723	723		0
Harris	4,602,523	1,583,486	75	15,435	12,809	1,029	2,626
Liberty	81,862	26,203	3	41	41		0
Matagorda	36,743	13,636	2	75	63	6	12
Montgomery	554,445	192,823	17	1,710	1,698	155	12
Walker	71,539	21,636	1	123	90	6	33
Waller	49,987	14,807					
Wharton	41,551	15,256	2	94	26	4	68

Number of Licensed Beds: is the maximum number of beds for which a hospital holds a license to operate.

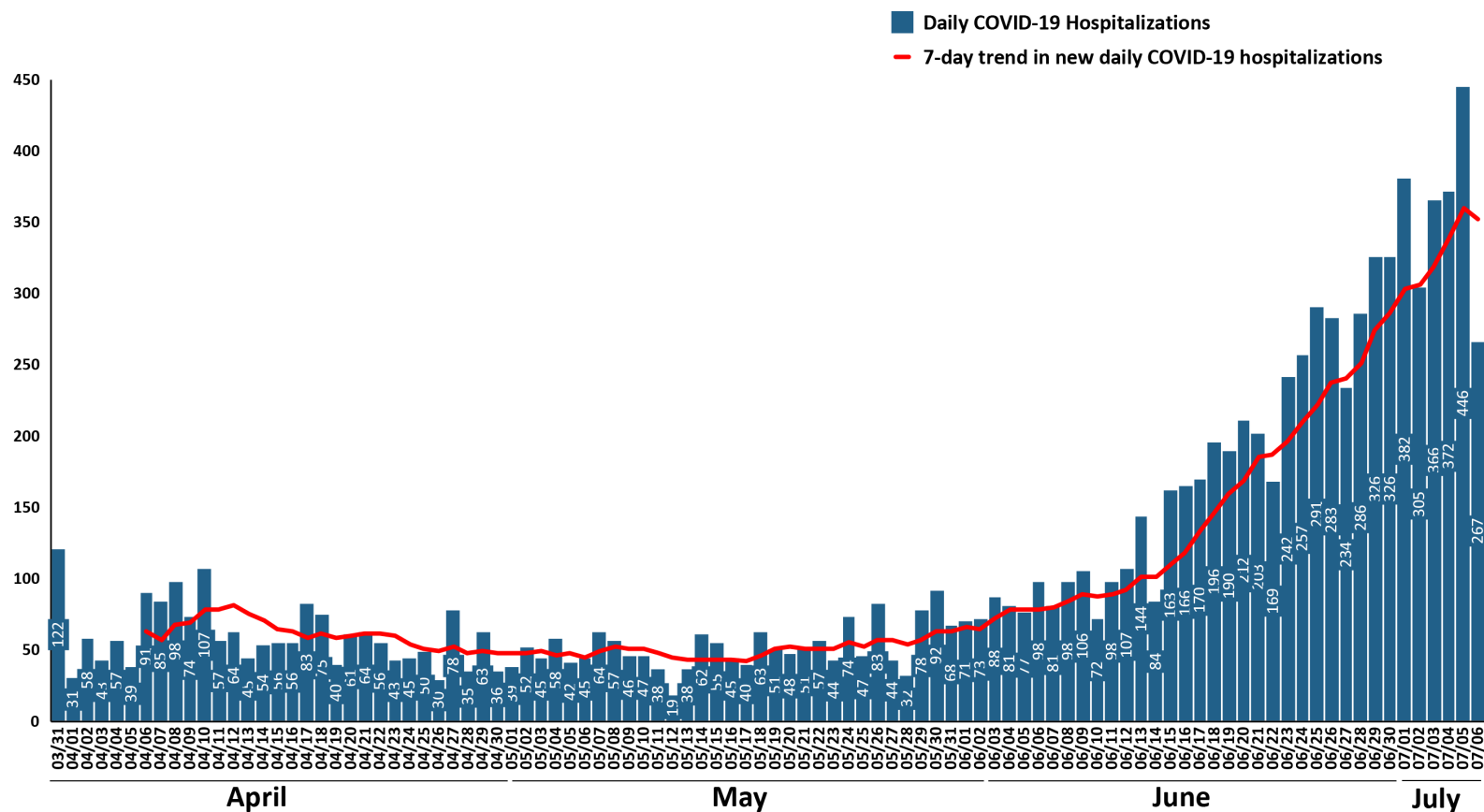
Number of Staffed Beds: is defined as an "adult bed, pediatric bed, birthing room, or newborn ICU bed maintained in a patient care area for lodging patients in acute, long term, or domiciliary areas of the hospital."

Potential Increase in Bed Capacity: This metric is computed by subtracting “Number of Staffed Beds from Number of Licensed beds” (Licensed Beds – Staffed Beds). This would provide insights into scenario planning for when staff can be shifted around to increase available bed capacity as needed.



TMC DAILY NEW COVID-19 HOSPITALIZATIONS

ICU & Med Surg hospitalizations



Source: TMC institution clinical census

TMC TEXAS MEDICAL CENTER

"TMC" refers to the group of systems that make up Texas Medical Center

July 06, 2020

Monitoring threshold:

Threshold is exceeded by the occurrence of a positive daily growth rate, averaged over 7 days

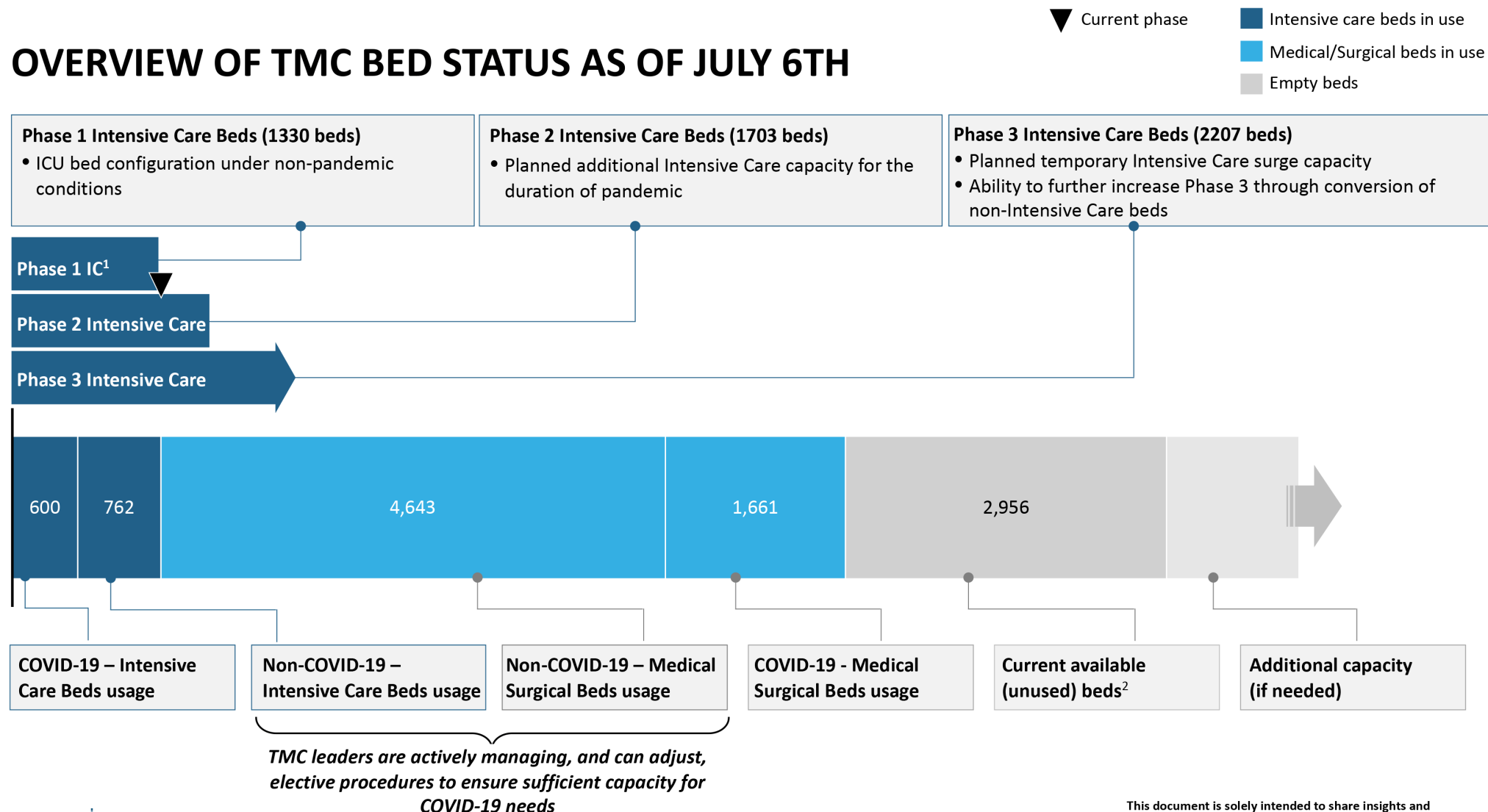
Current status:

2.5% daily growth rate (averaged over 7 days) in the COVID-19 daily hospital admissions trend

Notes:

While new daily cases may fluctuate for a variety of reasons (e.g., testing), the daily hospitalization trend shows an objective view of how COVID-19 impacts hospital systems

OVERVIEW OF TMC BED STATUS AS OF JULY 6TH



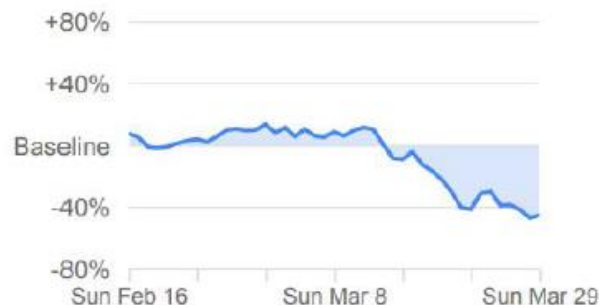
Google's Community Mobility Report

Retail & recreation

Restaurants, cafes, shopping centers, theme parks, museums, libraries, and movie theaters.

-45%

compared to baseline

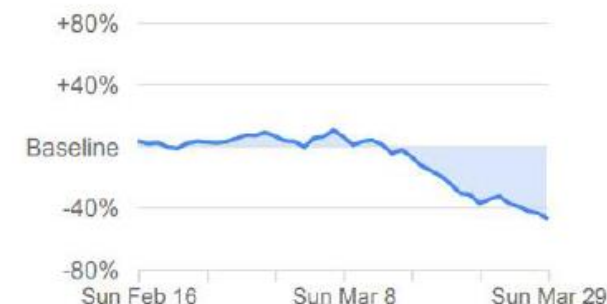


Transit stations

Public transport hubs such as subway, bus, and train stations.

-47%

compared to baseline



Grocery & pharmacy

Grocery markets, food warehouses, farmers markets, specialty food shops, drug stores, and pharmacies.

-23%

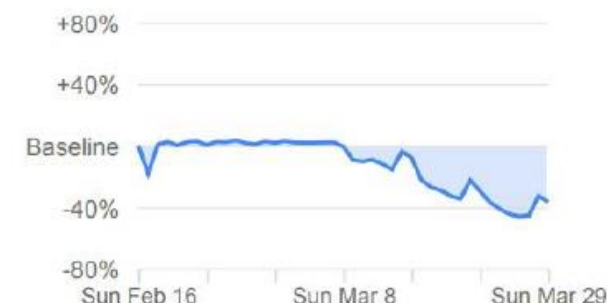
compared to baseline



Workplaces

-36%

compared to baseline

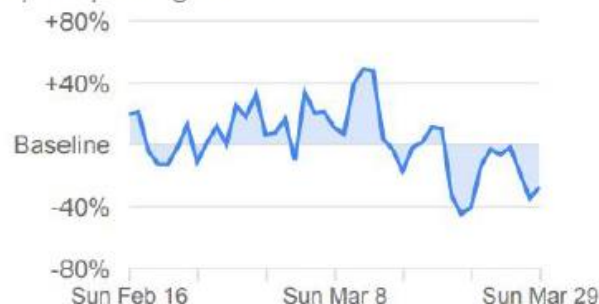


Parks

National parks, public beaches, marinas, dog parks, plazas, and public gardens.

-27%

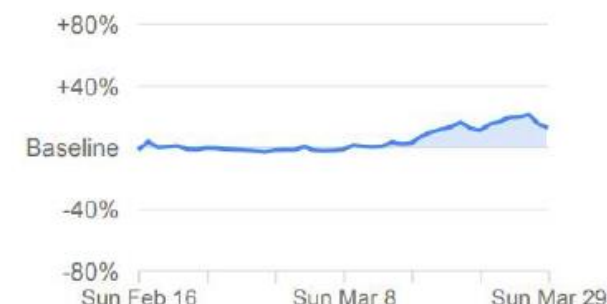
compared to baseline



Residential

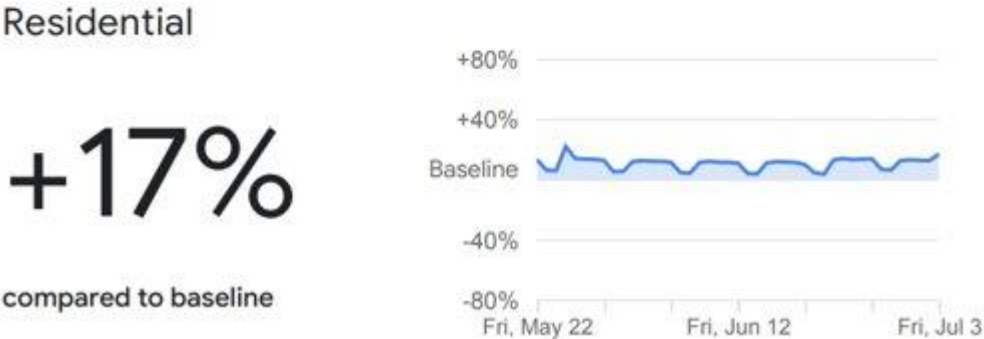
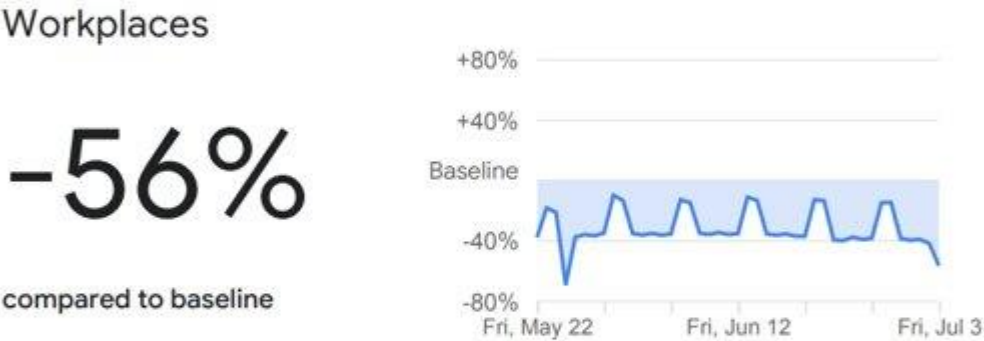
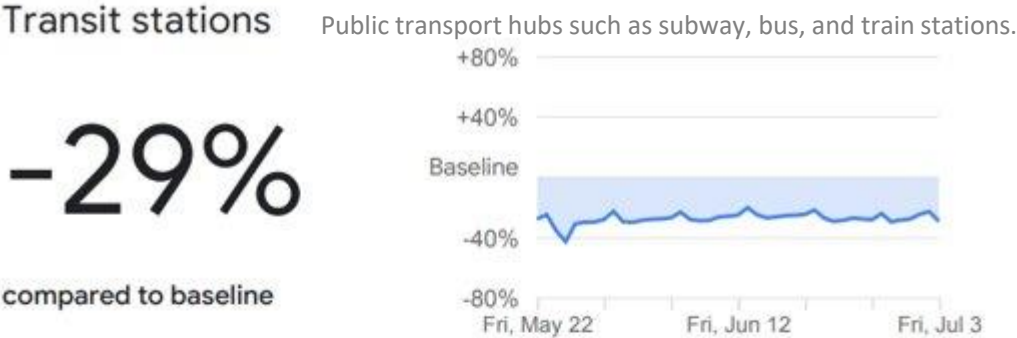
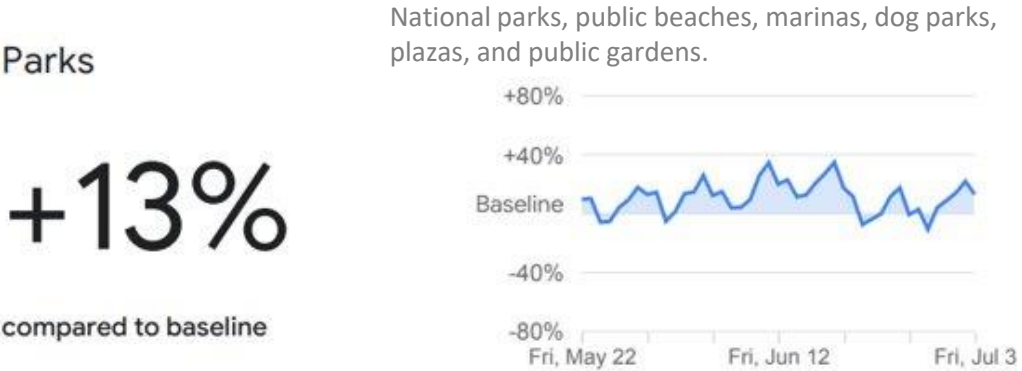
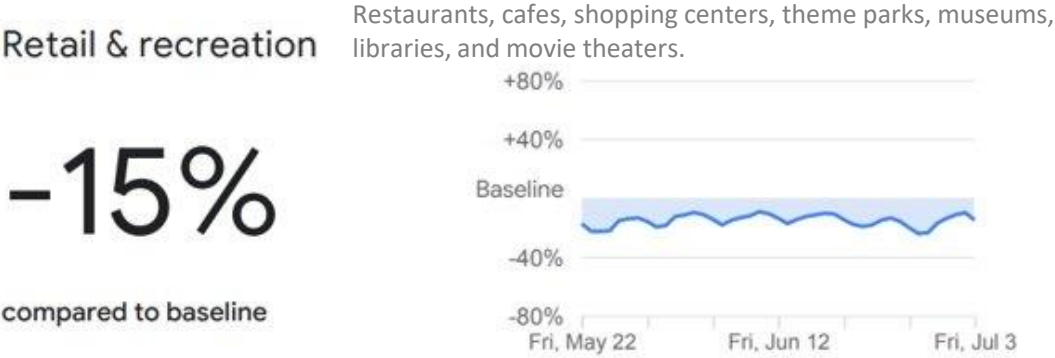
+13%

compared to baseline



Google's COVID-19 Community Mobility Report: Texas

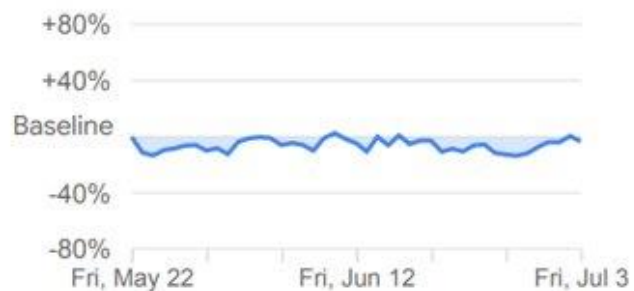
May22nd-July 3



Austin County

Retail & recreation

-3% compared to baseline



Grocery & pharmacy*

+15% compared to baseline



Parks*



Transit stations*



Workplaces

-57% compared to baseline



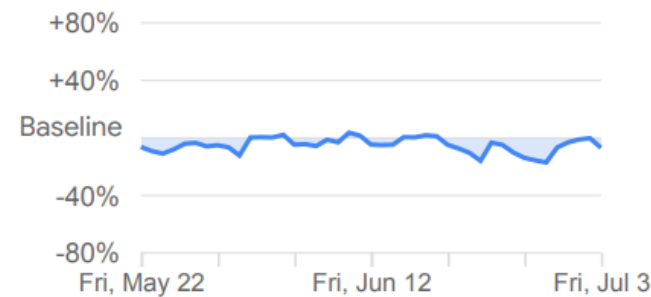
Residential*



Brazoria County

Retail & recreation

-7% compared to baseline



Grocery & pharmacy

+11% compared to baseline



Parks

+65% compared to baseline



Transit stations

-10% compared to baseline



Workplaces

-59% compared to baseline



Residential

+20% compared to baseline



Colorado County

* Not enough data for this date: Currently, there is not enough data to provide a complete analysis of this place. Google needs a significant volume of data to generate an aggregated and anonymous view of trends.

Retail & recreation*

+2% compared to baseline



Grocery & pharmacy*



Parks*



Transit stations

-10% compared to baseline

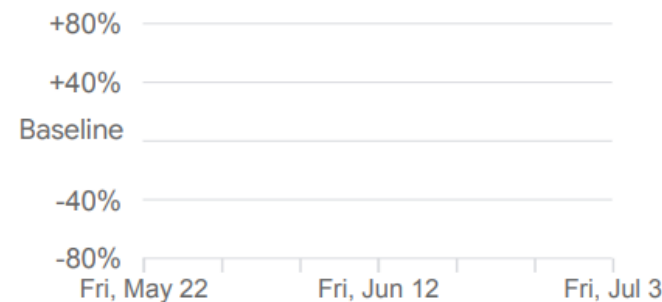


Workplaces

-46% compared to baseline



Residential*



Fort Bend County

Retail & recreation

-14% compared to baseline



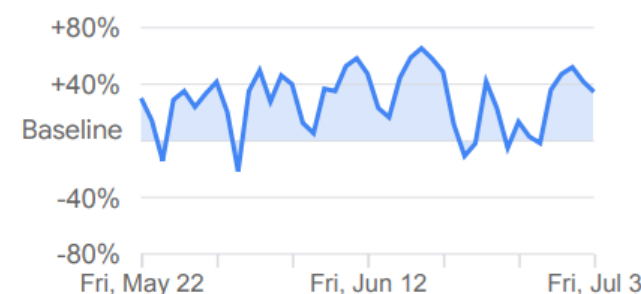
Grocery & pharmacy

+10% compared to baseline



Parks

+35% compared to baseline



Transit stations

-22% compared to baseline



Workplaces

-62% compared to baseline



Residential

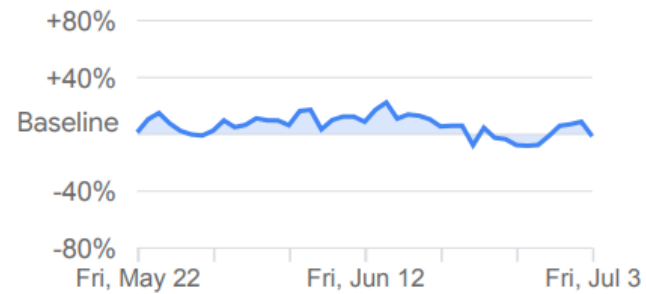
+23% compared to baseline



Galveston County

Retail & recreation

-1% compared to baseline



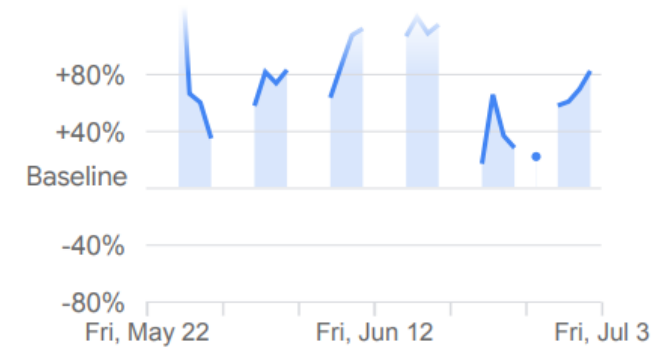
Grocery & pharmacy

+21% compared to baseline



Parks*

+83% compared to baseline



Transit stations*

+71% compared to baseline



Workplaces

-51% compared to baseline



Residential

+16% compared to baseline



Harris County

Retail & recreation

-18% compared to baseline



Grocery & pharmacy

+6% compared to baseline



Parks

-2% compared to baseline



Transit stations

-46% compared to baseline



Workplaces

-58% compared to baseline



Residential

+20% compared to baseline



Liberty County

Retail & recreation

-6% compared to baseline

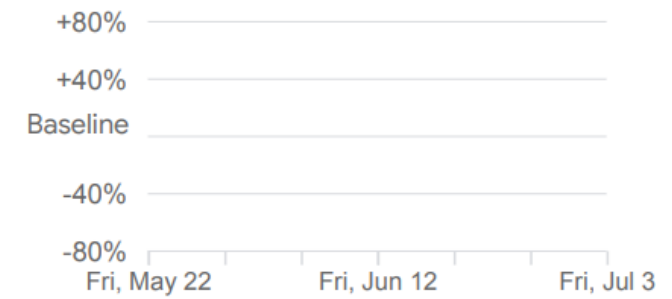


Grocery & pharmacy

+24% compared to baseline



Parks*



Transit stations

+8% compared to baseline



Workplaces

-53% compared to baseline



Residential

+16% compared to baseline



Matagorda County

Retail & recreation

-6% compared to baseline



Grocery & pharmacy

+19% compared to baseline



Parks*



Transit stations*



Workplaces

-46% compared to baseline



Residential*

+10% compared to baseline



Montgomery County

Retail & recreation

-10% compared to baseline



Grocery & pharmacy

+10% compared to baseline



Parks

+42% compared to baseline



Transit stations

-6% compared to baseline



Workplaces

-57% compared to baseline



Residential

+18% compared to baseline

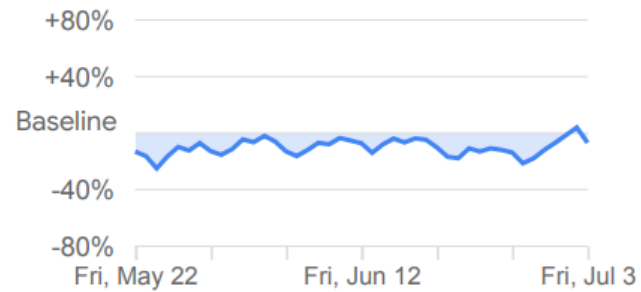


Walker County

* Not enough data for this date: Currently, there is not enough data to provide a complete analysis of this place. Google needs a significant volume of data to generate an aggregated and anonymous view of trends.

Retail & recreation

-7% compared to baseline



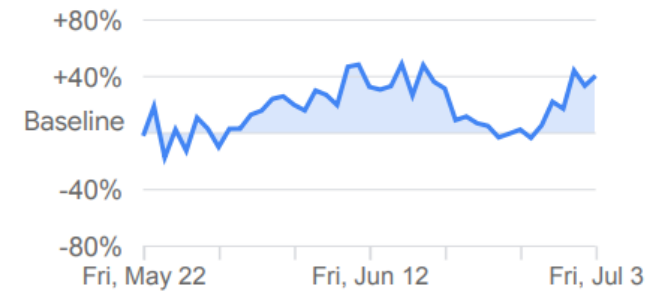
Grocery & pharmacy

+13% compared to baseline



Parks

+41% compared to baseline



Transit stations

-1% compared to baseline



Workplaces

-47% compared to baseline



Residential*

+12% compared to baseline



Waller County

Retail & recreation

-6% compared to baseline



Grocery & pharmacy

+19% compared to baseline



Parks*



Transit stations

-3% compared to baseline



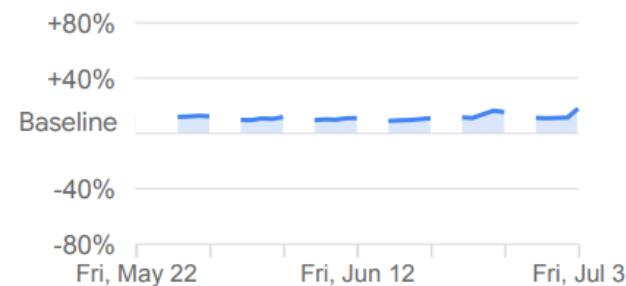
Workplaces

-56% compared to baseline



Residential*

+18% compared to baseline



Wharton County

Retail & recreation

-12% compared to baseline



Grocery & pharmacy

+5% compared to baseline



Parks*



Transit stations

-7% compared to baseline



Workplaces

-49% compared to baseline



Residential*

+9% compared to baseline



Contact-

E-mail- Forecast@h-gac.com