



TRANSWESTERN

HOUSTON HEALTHCARE/ MEDICAL OFFICE MARKET

Q2 2022

TRENDLINES

	Q2 2022	Q2 2021	ONE-YEAR TRAILING	FIVE-YEAR AVERAGE	12-MONTH FORECAST
UNEMPLOYMENT RATE %	4.6	7.9	↓	5.7	↓
NET ABSORPTION (Thousands SF)	85.5	-11.0	↑	92.9	↑
DIRECT VACANCY RATE	12.5%	12.8%	↓	12.3%	↔
TOTAL AVAILABILITY (MSF)	4.0	4.0	↔	3.7	↔
UNDER CONSTRUCTION (MSF)	1.6	0.5	↑	0.8	↔
ASKING RENT, FULL SERVICE (PSF)	\$30.12	\$28.46	↑	\$27.98	↔
SALES VOLUME (Millions)	\$64.6	\$74	↓	\$109.3	↑

Source: Bureau of Labor Statistics, CoStar, Real Capital Analytics, Revista, Transwestern

MEDICAL OFFICE CONSTRUCTION CLIMBS TO 1.6M SF; HOSPITALS TO 1.7M SF

Houston’s healthcare sector is undergoing one of the most robust expansionary cycles it has seen in the past decade. Combined, off- and on-campus facilities now have more than 1.4 million square feet in the pipeline. The lion’s share, 520,000 square feet, is in the Texas Medical Center (TMC) followed by the The Woodlands (160,662 SF), Far West (160,000 SF), Sugar Land (160,000 SF) and Near West (125,000 SF). Meanwhile, Houston area hospitals are expanding (115,000 SF) or adding new facilities (1.6 million SF) to the grand total of nearly 2.2 million square feet. Driving the construction are two metro area dynamics: rapid population growth followed by a strong post-pandemic rebound in area employment.

On that topic, the region’s healthcare employment level continues to outpace the nation’s by expanding 5.2 percent in the past 12 months compared to 4.1 percent for U.S. annual healthcare job growth. In fact, Houston’s area economy continues to post significant job gains overall. The most recent data shows the region created 31,300 jobs in June topping the 31,000 added in May, making this June the second-best on record trailing only June 2020 as Houston fiercely began to shake off immediate spring losses early in the pandemic. Total area employment beats the pre-pandemic high capping out currently at 3.26 million, which bodes well for the expanding healthcare industry and related construction cycle during the second half of the year.

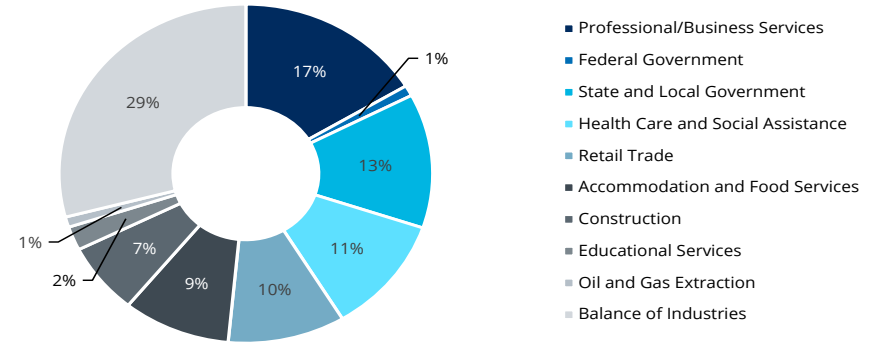


ECONOMY

Greater Houston's Area Employment Achieves New Milestone

- Metro Houston created 31,300 jobs in June followed by another 31,000 in May according to the most recent data release by the U.S. Bureau of Labor Statistics making it the second-best June on record and comes in well above the 20-year/pre-pandemic average of 12,000 jobs for the month. While the early numbers may be revised downward, total non-farm payroll employment now tops 3,261,600 and is well above the previous peak of 3,207,900 reached in November 2019. That total employment, which includes all industry categories, has reached a new peak while energy continues to shed jobs. This illustrates the diminishing role oil and gas play in Houston's economy notes the Greater Houston Partnership following the employment report.
- Houston employment now exceeds pre-pandemic levels in 11 job sectors, with arts, entertainment, and recreation and professional, scientific, and technical services achieving that status in the recent statistical releases during the quarter. As seasonally expected, local public education (i.e., school districts) shed 4,900 payrolls.
- Meanwhile, construction hiring surged, adding 9,200 jobs, its best performance in several years. The local sector should recoup all its losses by the end of this year, especially as the federal infrastructure funding starts to kick in with approximately \$600 billion earmarked for transportation-specific projects nationwide.
- In other indicators, inflation, as measured by the Consumer Price Index for all Urban Consumers (CPI-U), rose 8.6 percent nationwide in the 12 months ending May, its highest since December 1981, when the annual rate topped 8.9 percent. The price increases were broad-based, with the cost of shelter, gasoline, and food being the largest contributors to the surge in inflation. In its June survey of consumer sentiment, the University of Michigan found most respondents expect inflation to average 5.4 percent or better in 2023 and 3.3 percent or more over the next five years.

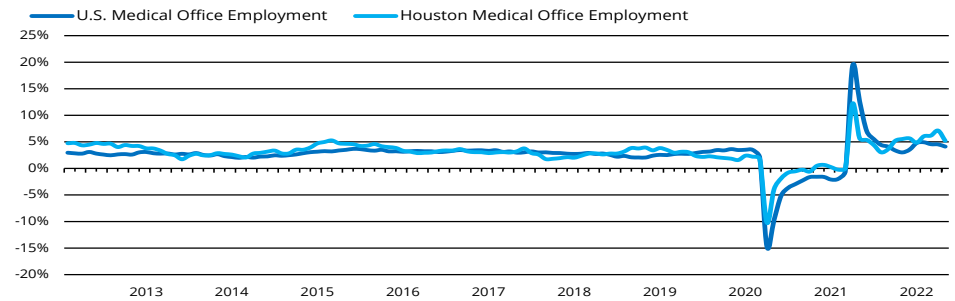
Y-O-Y CHANGE IN MEDICAL OFFICE JOBS



Source: Bureau of Labor Statistics, Transwestern

SHARE OF EMPLOYEES BY INDUSTRY

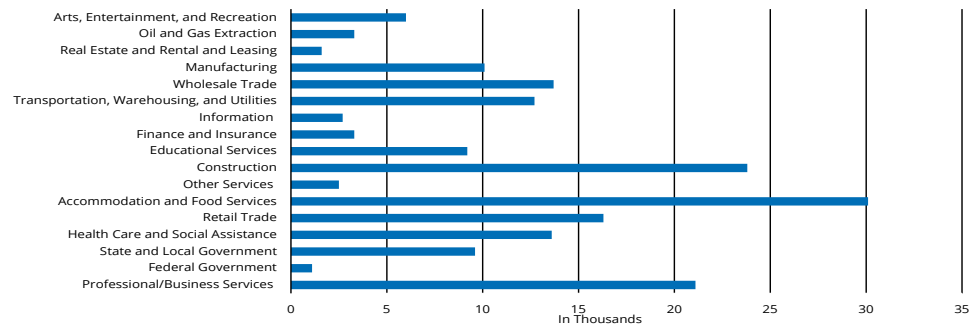
Houston | March 2022



Source: Bureau of Labor Statistics, Transwestern

Y-O-Y CHANGE IN JOBS BY INDUSTRY

Houston | March 2022



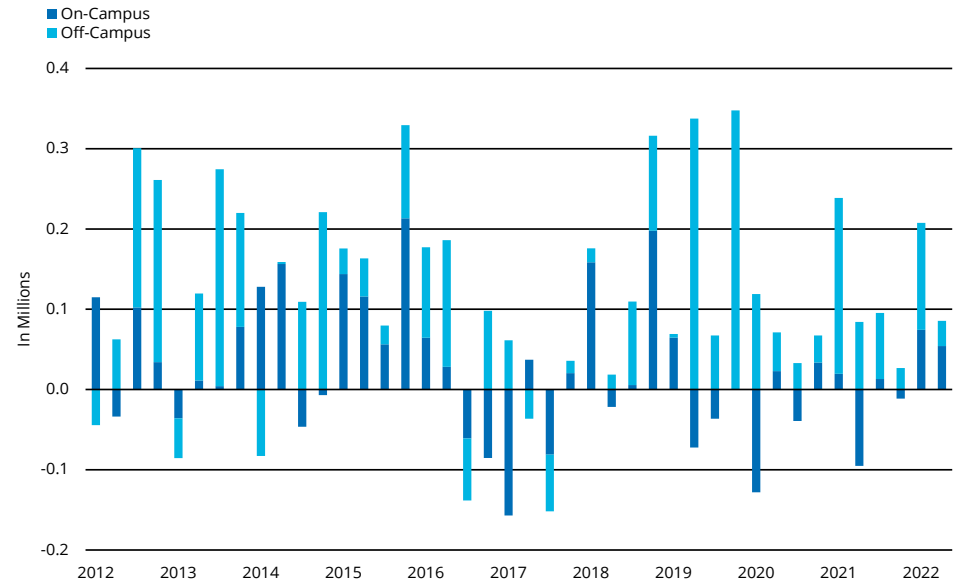
Source: Bureau of Labor Statistics, Transwestern

NET ABSORPTION

Suburban Off Campus Tenant Demand Leads to Consecutive Growth

- Houston’s medical landlords saw stable demand by occupiers this quarter which marks two consecutive quarters of increased absorption. The recent period reported approximately 85,000 square feet of positive growth, with most of the activity taking place in The Woodlands, where tenants continued to lease top quality office buildings in the growing suburban submarket. Physicians Group of the Woodlands, a private Internal medicine practice, signed for approximately 17,000 square feet at the recently delivered 134 Vision Park. On the urban side of the metro, the Bellaire submarket saw Legacy Community Health Services inked a lease for more 13,500 square feet at Bellaire Medical Plaza.
- Off-campus facilities accounted for most of the recent activity. Leading the way was The Woodlands, followed by Conroe, Bellaire, 290 Corridor and the Texas Medical Center (TMC) respectively. The Woodlands saw the greatest amount of demand for off-campus medical buildings as tenants signed for 36,000 square feet of space followed by Conroe with 14,000 square feet followed by Bellaire at nearly 13,500 square feet and pulling in fourth was the Texas Medical Center (TMC) with 9,000 square feet. All four submarkets combined to total nearly 60,000 square feet of newly occupied space specifically in off-campus properties.
- On the flip side, with Houston’s on-campus total inventory nearing 14.6 million square feet, also saw leasing activity this quarter with positive absorption occurring in the suburban areas including the Northeast, The Woodlands, Near West, Far West, and Conroe occupying a combined 55,000 square feet during the quarter. Most notable leasing activity this quarter was Lymphedema Therapy Specialist, a private outpatient lymphedema clinic, which took down 6,000 square feet at 1501 River Pointe Dr the Conroe Medical Office Building.

NET ABSORPTION BY CLASS



Source: CoStar, Revista, Transwestern

TOP TEN HEALTHCARE SYSTEMS BY NUMBER OF BEDS

Houston Metro Area

HEALTHCARE SYSTEM	ACUTE CARE BEDS	LOCAL HOSPITALS
MEMORIAL HERMANN	4,164	14
HCA HOUSTON HEALTHCARE	3,068	13
HOUSTON METHODIST	2,393	8
CHI ST. LUKE'S HEALTH	1,301	8
TEXAS CHILDREN'S HOSPITAL	973	2
UNIVERSITY OF TEXAS MEDICAL BRANCH HEALTH SYSTEM	798	5
ST. JOSEPH MEDICAL CENTER	790	2
THE UNIVERSITY OF TEXAS MD ANDERSON CANCER CENTER	716	1
HARRIS HEALTH SYSTEM	617	2
MICHAEL E. DEBAKEY VETERANS AFFAIRS MEDICAL CENTER	350	1
TOTAL	15,170	56

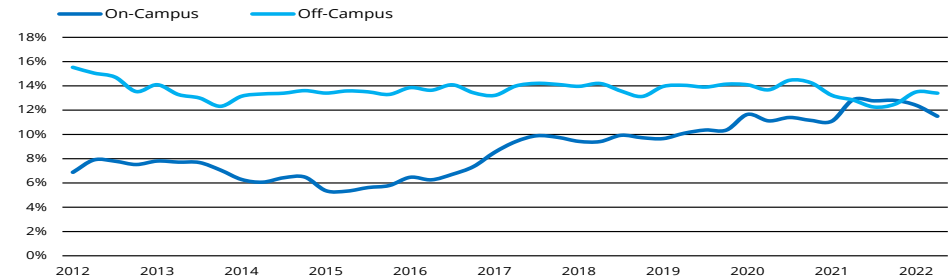
Source: Houston Business Journal, Transwestern

VACANCY

Positive Absorption, No Space Deliveries Push Down Vacancy

- Overall direct vacancy tightened this quarter by 90 basis points to 12.5 percent as occupiers took down space at a moderate pace while Houston’s healthcare construction pipeline saw no new deliveries.
- On close inspection, Houston’s on-campus medical properties witnessed a 1.3 percent decrease in direct vacancy, going from 12.8 percent in the first quarter and finishing at 11.5 percent in the second quarter.
- Meanwhile, the most notable decreases in vacancy came from Clear Lake (from 12.0% to 3.7%), Northeast (40.6% to 32.6%), The Woodlands (7.8% to 6.0%), Far West (15.2% to 14.3%), and Conroe (12.6% to 11.7%).
- Off-campus facilities also noted a decrease in vacancy, decreasing 50 basis points over the period from 13.9 percent in the first quarter to 13.4 percent in the second quarter. The submarkets with the largest decreases in vacancy were Conroe (from 14.5% to 10.1%), The Woodlands (10.7% to 7.4%), Texas Medical Center (13.7% to 12.4%), and Bellaire (13.1% to 12.0%). Combined these four submarkets comprised nearly 60,000 square feet of off-campus absorption this reporting period.

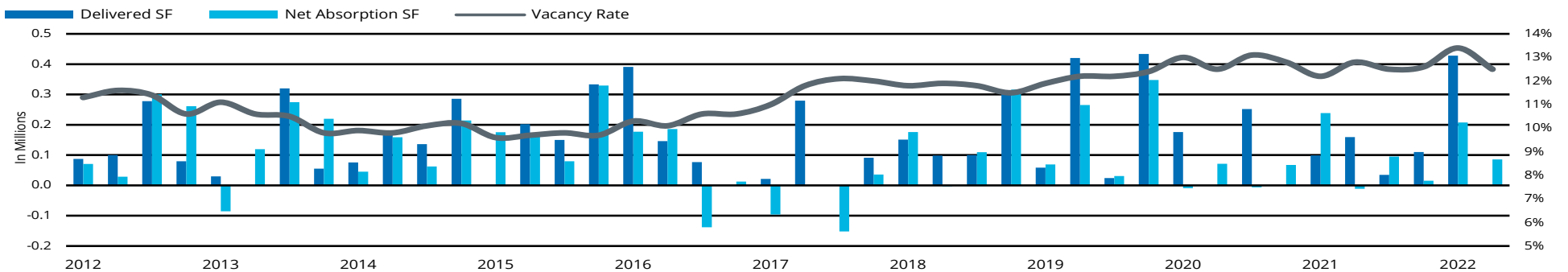
OVERALL VACANCY RATE



Source: CoStar, Transwestern

Source: CoStar, Revista, Transwestern

DELIVERY IMPACT ON KEY INDICATORS



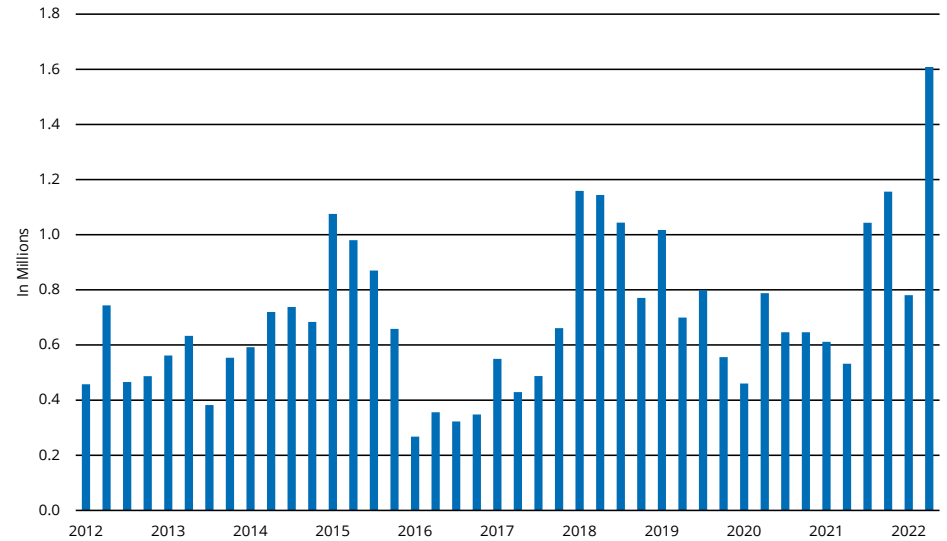
Source: CoStar, Revista, Transwestern

UNDER CONSTRUCTION

Construction Ramps Up as Providers Expand Their Footprints

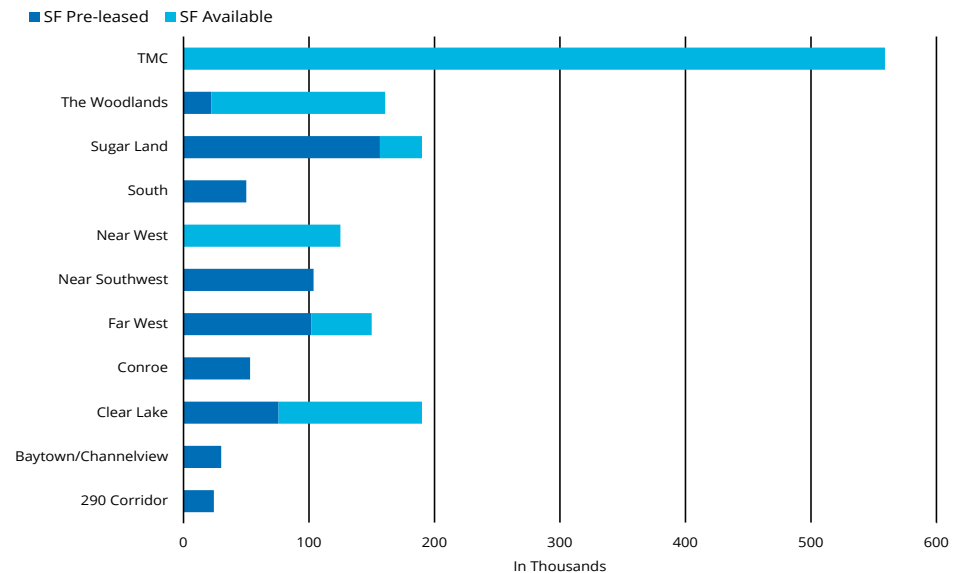
- Houston’s healthcare pipeline reached its highest point in recent history with 1.6 million square feet now underway linked to Houston’s growing population and strong investor demand in this asset class. The majority is in the Texas Medical Center (TMC) which has 560,00 square feet in the pipeline.
- Additional activity includes The Woodlands (161K SF, off-campus), Far West (160K SF, on-campus), Sugar Land, (160,000 SF, on-campus), Clear Lake (153K SF, off-campus), Near West (125K SF), Near Southwest (104K SF, off-campus), South (50K SF, on-campus), Sugar Land (30K SF, off-campus), and Baytown (30K SF, off-campus). Outside of TMC, these submarkets have a combined total of approximately 500,000 square feet underway.
- Demand in the Near Southwest is outpacing current supply where approximately 104,000 square feet will deliver in early 2023 that is fully preleased. For example, HOPE Clinic, a community health center, broke ground on its flagship location the T.T. and W.F. Chao Foundation HOPE Health and Wellness Center at 13930 Bellaire Blvd. The three-story approximately 70,000 square foot healthcare facility on 3.5-acres at the corner of Metro and Bellaire Boulevard. Also breaking ground in the Near Southwest Kelsey Seybold’s clinic, a two-story, 33,000-square-foot clinic at 11211 Nexus Ave. The new clinic will offer primary and specialty health care with access to on-site imaging, including X-ray along with capabilities for mobile MRI and CT.
- Also noteworthy this quarter, Memorial Hermann Katy Hospital, began its expansion of 115,000 square feet of new and renovated services area, adding nearly 100 beds, a third professional office building, and additional parking. Meanwhile, Houston Methodist also broke ground on its ninth hospital, in the 290 Corridor, the 571,000-square-foot hospital modeled after Houston Methodist - The Woodlands and Houston Methodist West hospitals incorporating advancements from its Center for Innovation located at its Cypress facility.

UNDER CONSTRUCTION



Source: CoStar, Transwestern

UNDER CONSTRUCTION BY SUBMARKET



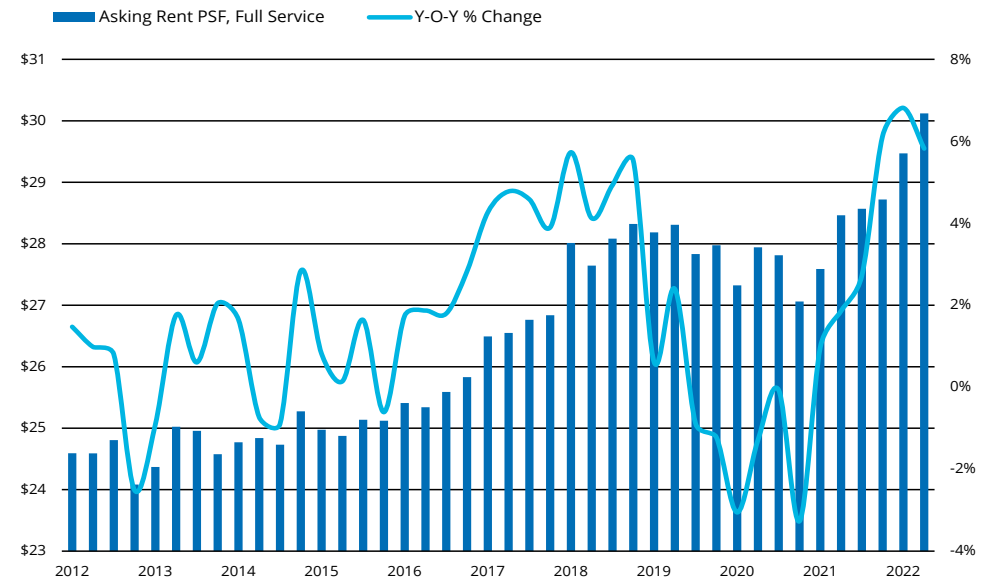
Source: CoStar, Revista, Transwestern

RENTAL RATES

Full-Service Rents Up by \$0.65/PSF Linked to New Demand

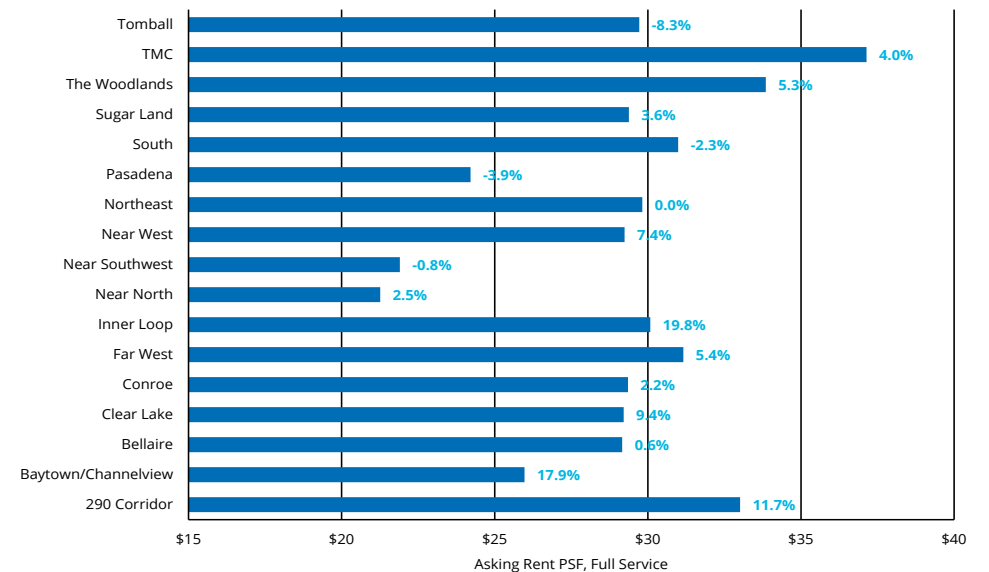
- Houston’s healthcare sector exhibited healthy full-service rent growth during the quarter, rising from \$28.88 PSF/YR to \$30.12 PSF/YR with gains being made by a little less than half of all area submarkets while ten experienced modest declines in asking rents, among them include the Near West and Tomball with slight increases in direct vacancy.
- Full-service rents also marked annual year-over-year improvement by rising \$1.66 PSF/YR over Q2 2022 when average asking full-service rent weighted in at \$28.46 PSF/YR. Double-digit 12-month rent growth continues to be seen in healthcare submarkets with the most active new development and growing tenant demand – mainly in the outlying suburban areas with strong new residential construction such as Katy Freeway East, Clear Lake and Conroe. These areas are particularly expanding in other real estate sectors such as Class A multifamily units with two or more bedrooms and mid-priced single-family homes focused on entry level buyers.
- Proving this movement, submarkets that stood out with rent increases include those with construction ongoing to recently delivered. These include Conroe, which saw full-service rates increase to \$29.35 PSF/YR from to \$28.32 PSF/YR over the quarter and currently has 53,000 square feet under the construction, the Texas Medical Center (TMC) saw its rents increase to \$37.14 PSF/YR and has 559,000 square feet in the pipeline and lastly, Far West where rents rose to \$31.16 PSF/YR and currently has 125,000 square feet under construction.

ASKING RENT



Source: CoStar, Revista, Transwestern

ASKING RENTS BY SUBMARKET AND Y-O-Y GROWTH



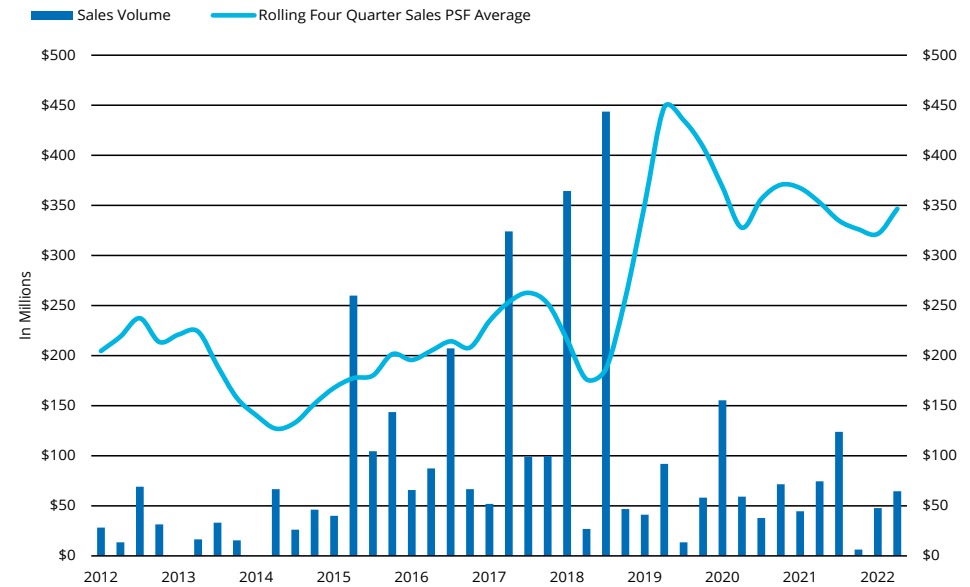
Source: CoStar, Revista, Transwestern

SALES

REITs Were Big Buyers in Q2 Compared to Q1

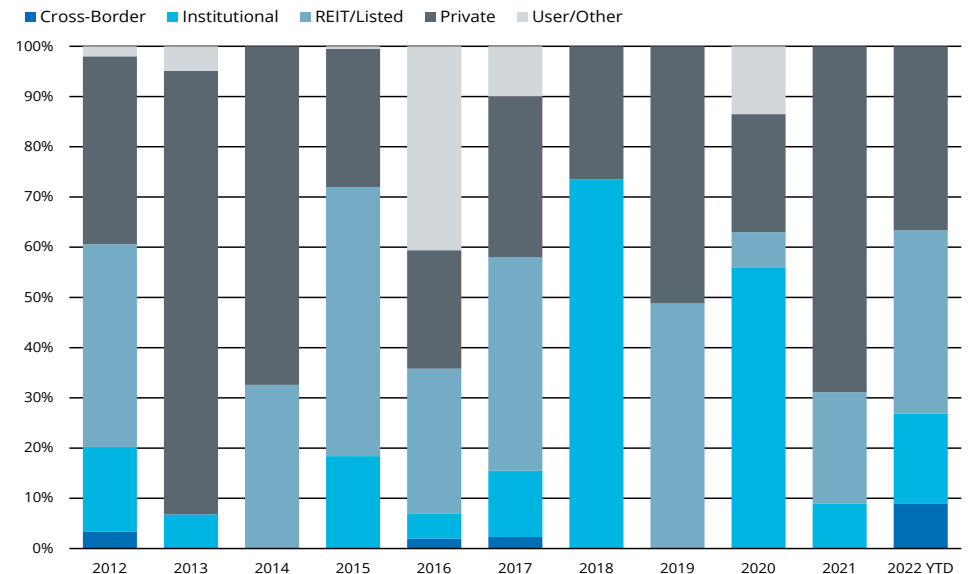
- International investors and REITs ended the second quarter as net-buyers for healthcare assets with net acquisitions registering \$14 million and \$43.3 million, respectively. REITs have made a complete 180-degree U-turn from the previous 90-day period this year where they, along with institutional investors, were net sellers of Houston area healthcare facilities.
- Meanwhile, institutional and private investors finish as net sellers for the quarter. Institutions disposed of a total of \$57 million of healthcare assets, a stark difference over Q1 2022 when the group purchased an estimated \$27.6 million. Private investors continue the group’s streak of being net sellers during 2022 with total of \$42.2 million of dispositions taking place, bringing the net sales total to \$27.9 million for 2022.
- In notable transactions, Vision Park Professional Medical Building, a 76,906-square-foot facility located in The Woodlands was sold in April by Peter Kvpil MD to Healthcare Realty Trust. Healthcare Realty Trust, a Medical Office REIT, purchased the fully occupied Class-A property.

SALES VOLUME




Source: Real Capital Analytics, Transwestern

BUYER CAPITAL COMPOSITION



Source: Real Capital Analytics, Transwestern

NOTABLE LEASES

TENANT	ADDRESS	SUBMARKET	LEASE TYPE	SF LEASED
LEGACY COMMUNITY HEALTH	5420 Dashwood Dr.	Bellaire	New	13,502
HOUSTON RESEARCH INSTITUTE	1155 Dairy Ashford	Near West	New	10,117
NANOSPECTRA BIOSCIENCES	8285 El Rio St	Inner Loop	Renewal	9,075
HOUSTON MEDICAL IMAGING	1155 Dairy Ashford	Near West	New	7,961
LYMPHEDEMA THERAPY SPECIALIST	1501 River Pointe Dr	Conroe	New	6,000
CHRISTOPHER DOWNING MD 	13114 FM 1960 W	290 Corridor	New	5,177

NOTABLE MOB'S UNDER CONSTRUCTION

ADDRESS	BUILDING NAME	SUBMARKET	BUILDING SF	PRE-LEASED %
6929 MAIN ST	Horizon Tower	TMC	520,000	0%
18700 KATY FWY	Houston Methodist Hospital MOB 3	Far West	160,000	70%
16537 SOUTHWEST FWY	Houston Methodist Hospital MOB 4	Sugar Land	160,000	90%
1001 KATY FWY	Kelsey-Seybold	Near West	125,000	0%
1715 SOUTH FRIENDSWOOD	1715 South Friendswood	Clear Lake	105,800	6%
13930 BELLAIRE BLVD	T.T and W.F. Chao Foundation Hope Health	Near Southwest	70,647	100%
3786 FM 1488 RD	Magnolia Medical Specialist	Conroe	53,000	0%

NOTABLE HOSPITALS UNDER CONSTRUCTION

BUILDING NAME	SUBMARKET	BLDG./EXPANSION SF	EXPECTED DELIVERY
CENTENNIAL TOWER	TMC	1,000,000	Q3 2027
HOUSTON METHODIST CYPRESS	290 Corridor	571,000	Q1 2025
MEMORIAL HERMANN KATY*	Far West	115,000	Q2 2024
THE MENINGER OUTPATIENT CLINIC	Near Southwest	33,000	Mid-Late 2022

These statistics are not combined into the Houston Medical Office Market Indicators

* Indicates Hospital is expanding



HOUSTON MEDICAL OFFICE MARKET INDICATORS

SUBMARKET	INVENTORY SF	DIRECT VACANT SF	DIRECT VACANCY RATE	OVERALL AVAILABILITY RATE	UNDER CONSTRUCTION SF	NET ABSORPTION SF	Y-O-Y NET ABSORPTION SF	ASKING RENT PSF
TOTALS								
OFF CAMPUS	17,124,374	2,300,004	13.4%	18.3%	718,307	31,372	229,910	\$27.92
ON CAMPUS	14,614,808	1,680,020	11.5%	17.2%	890,094	54,170	494,916	\$32.53
GRAND TOTAL	31,739,182	3,980,024	12.5%	17.8%	1,608,401	85,542	724,826	\$30.12

SUBMARKET	INVENTORY SF	DIRECT VACANT SF	DIRECT VACANCY RATE	OVERALL AVAILABILITY RATE	UNDER CONSTRUCTION SF	NET ABSORPTION SF	Y-O-Y NET ABSORPTION SF	ASKING RENT PSF, FULL SERVICE
290 CORRIDOR								
OFF CAMPUS	642,396	107,787	16.8%	17.6%	24,220	8,301	26,196	\$27.06
ON CAMPUS	628,244	177,548	28.3%	31.2%		-1,820	55,030	\$36.83
290 CORRIDOR TOTAL	1,270,640	285,335	22.5%	24.2%	24,220	6,481	81,226	\$33.01
BAYTOWN/CHANNELVIEW								
OFF CAMPUS	293,628	85,514	29.1%	27.8%	30,000	-4,252	-58,182	\$25.97
ON CAMPUS	143,291	-	-	-	-	-	-	-
BAYTOWN/CHANNELVIEW TOTAL	436,919	85,514	19.6%	19.3%	30,000	-4,252	-58,182	\$25.97
BELLAIRE								
OFF CAMPUS	1,342,310	161,691	12.0%	21.4%	-	13,516	3,266	\$28.87
ON CAMPUS	226,714	6,565	2.9%	2.9%	-	-	-	\$40.19
BELLAIRE TOTAL	1,569,024	168,256	10.7%	18.8%	-	13,516	3,266	\$29.16
CLEAR LAKE								
OFF CAMPUS	828,439	45,230	5.5%	19.8%	152,871	297	38,903	\$24.05
ON CAMPUS	1,284,034	47,107	3.7%	4.2%	-	-	1,672	\$37.39
CLEAR LAKE TOTAL	2,112,473	92,337	4.4%	11.0%	152,871	297	40,575	\$29.21
CONROE								
OFF CAMPUS	311,171	31,312	10.1%	11.3%	53,000	13,800	66,169	\$26.47
ON CAMPUS	640,145	74,688	11.7%	15.7%	-	5,898	26,700	\$30.81
CONROE TOTAL	951,316	106,000	11.1%	14.1%	53,000	19,698	92,869	\$29.35



HOUSTON MEDICAL OFFICE MARKET INDICATORS

SUBMARKET	INVENTORY SF	DIRECT VACANT SF	DIRECT VACANCY RATE	OVERALL AVAILABILITY RATE	UNDER CONSTRUCTION SF	NET ABSORPTION SF	Y-O-Y NET ABSORPTION SF	ASKING RENT PSF, FULL SERVICE
FAR WEST								
OFF CAMPUS	875,760	161,296	18.4%	17.7%	-	6,556	-45	\$34.54
ON CAMPUS	825,647	118,144	14.3%	16.3%	160,000	7,376	5,957	\$26.84
FAR WEST TOTAL	1,701,407	279,440	16.4%	17.1%	160,000	13,932	5,912	\$31.16
INNER LOOP								
OFF CAMPUS	1,520,416	204,660	13.5%	15.2%	-	6,440	-48,142	\$31.29
ON CAMPUS	421,706	184,076	43.7%	43.7%	-	-	-14,362	\$28.71
INNER LOOP TOTAL	1,942,122	388,736	20.0%	21.4%	-	6,440	-62,504	\$30.08
NEAR NORTH								
OFF CAMPUS	1,337,252	306,463	22.9%	32.0%	-	-8,738	-6,275	\$21.26
ON CAMPUS	-	-	-	-	-	-	-	-
NEAR NORTH TOTAL	1,337,252	306,463	22.9%	32.0%	-	-8,738	-6,275	\$21.26
NEAR SOUTHWEST								
OFF CAMPUS	713,543	94,322	13.2%	12.9%	103,647	-37,662	-8,089	\$21.17
ON CAMPUS	612,630	130,636	21.3%	29.2%	-	-	-1,159	\$22.33
NEAR SOUTHWEST TOTAL	1,326,173	224,958	17.0%	19.9%	103,647	-37,662	-9,248	\$21.90
NEAR WEST								
OFF CAMPUS	1,596,090	162,073	10.2%	11.9%	125,000	7,420	25,596	\$26.71
ON CAMPUS	2,174,971	180,738	8.3%	11.0%	-	9,803	-18,733	\$31.56
NEAR WEST TOTAL	3,771,061	342,811	9.1%	11.4%	125,000	17,223	6,863	\$29.24
NORTHEAST								
OFF CAMPUS	1,032,772	85,121	8.2%	11.6%	-	461	-25,472	\$29.92
ON CAMPUS	239,098	77,933	32.6%	32.6%	-	19,242	27,016	\$29.70
NORTHEAST TOTAL	1,271,870	163,054	12.8%	15.6%	-	19,703	1,544	\$29.82



HOUSTON MEDICAL OFFICE MARKET INDICATORS

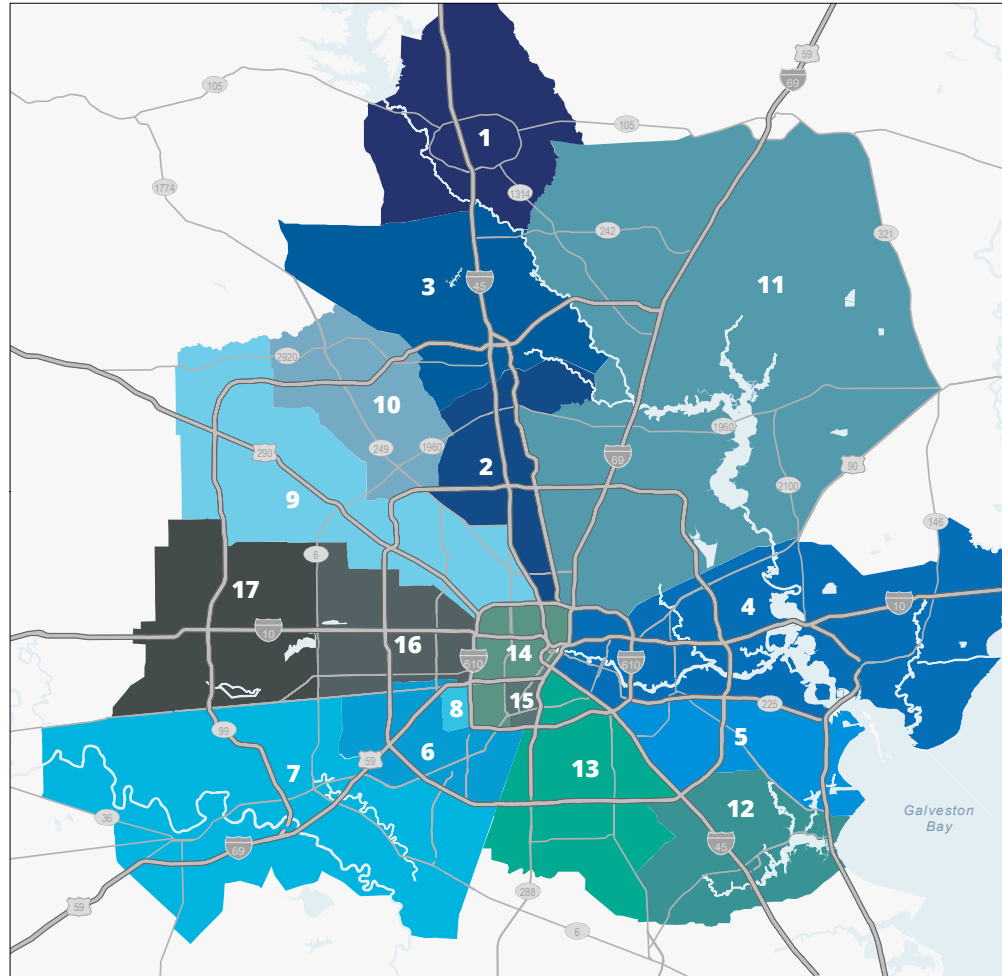
SUBMARKET	INVENTORY SF	DIRECT VACANT SF	DIRECT VACANCY RATE	OVERALL AVAILABILITY RATE	UNDER CONSTRUCTION SF	NET ABSORPTION SF	Y-O-Y NET ABSORPTION SF	ASKING RENT PSF, FULL SERVICE
PASADENA								
OFF CAMPUS	505,525	103,148	20.4%	21.0%	-	378	-14,962	\$23.62
ON CAMPUS	84,655	9,940	11.7%	11.7%	-	-714	1,981	\$30.48
PASADENA TOTAL	590,180	113,088	19.2%	19.7%	-	-336	-12,981	\$24.21
SOUTH								
OFF CAMPUS	552,671	69,226	12.5%	12.5%	-	-2,047	13,486	\$27.71
ON CAMPUS	261,425	42,921	16.4%	14.3%	50,000	-	14,706	\$36.10
SOUTH TOTAL	814,096	112,147	13.8%	13.2%	50,000	-2,047	28,192	\$30.99
SUGAR LAND								
OFF CAMPUS	1,163,397	231,470	19.9%	24.0%	30,000	-7,234	12,590	\$29.98
ON CAMPUS	913,061	103,878	11.4%	11.8%	160,000	1,449	10,264	\$27.97
SUGAR LAND TOTAL	2,076,458	335,348	16.2%	18.8%	190,000	-5,785	22,854	\$29.38
THE WOODLANDS								
OFF CAMPUS	1,299,896	96,655	7.4%	17.1%	160,662	23,147	62,482	\$32.61
ON CAMPUS	1,223,058	73,750	6.0%	14.2%	-	13,131	20,526	\$35.71
THE WOODLANDS TOTAL	2,522,954	170,405	6.8%	15.8%	160,662	36,278	83,008	\$33.85
TMC								
OFF CAMPUS	2,326,562	288,675	12.4%	18.4%	38,907	8,944	132,327	\$34.49
ON CAMPUS	4,641,472	435,696	9.4%	20.3%	520,094	-195	311,548	\$38.87
TMC TOTAL	6,968,034	724,371	10.4%	19.7%	559,001	8,749	443,875	\$37.14
TOMBALL								
OFF CAMPUS	782,546	65,361	8.4%	16.3%	-	2,045	10,062	\$28.97
ON CAMPUS	294,657	16,400	5.6%	18.6%	-	-	53,770	\$34.52
TOMBALL TOTAL	1,077,203	81,761	7.6%	17.0%	-	2,045	63,832	\$29.72

RESEARCH METHODOLOGY

The information in this report is the result of a compilation of information on healthcare/ medical office properties located in the Houston metropolitan area. This report includes single tenant, multi-tenant and owner-user properties 20,000 SF and larger, excluding those properties owned and occupied by a government agency.

ABOUT TRANSWESTERN

The privately held Transwestern companies have been delivering a higher level of personalized service and innovative real estate solutions since 1978. An integrated approach formed from fresh ideas drives value for clients across commercial real estate services, development, investment management and opportunistic programs for high-net-worth investors. The firm operates through **30+ U.S. offices** and global alliances with BNP Paribas Real Estate and Devencore. Learn more at transwestern.com and [@Transwestern](https://twitter.com/Transwestern).



Houston Medical Submarkets

- North**
 - 1 Conroe
 - 2 Near North
 - 3 The Woodlands
- East**
 - 4 Baytown/Channelview
 - 5 Pasadena
- Southwest**
 - 6 Southwest Near
 - 7 Sugar Land
 - 8 Bellaire
- Northwest**
 - 9 290 Corridor
 - 10 Tomball
- Northeast**
 - 11 Northeast
- Southeast**
 - 12 Clear Lake
 - 13 South
- Central**
 - 14 Inner Loop
 - 15 TMC
- West**
 - 16 Near West
 - 17 Far West

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