

COVID-19 Indicator Dashboard

October 6, 2020

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Baton Rouge Area Chamber®

Capital Region COVID-19 Indicator Dashboard

How has unemployment been impacted during the pandemic?

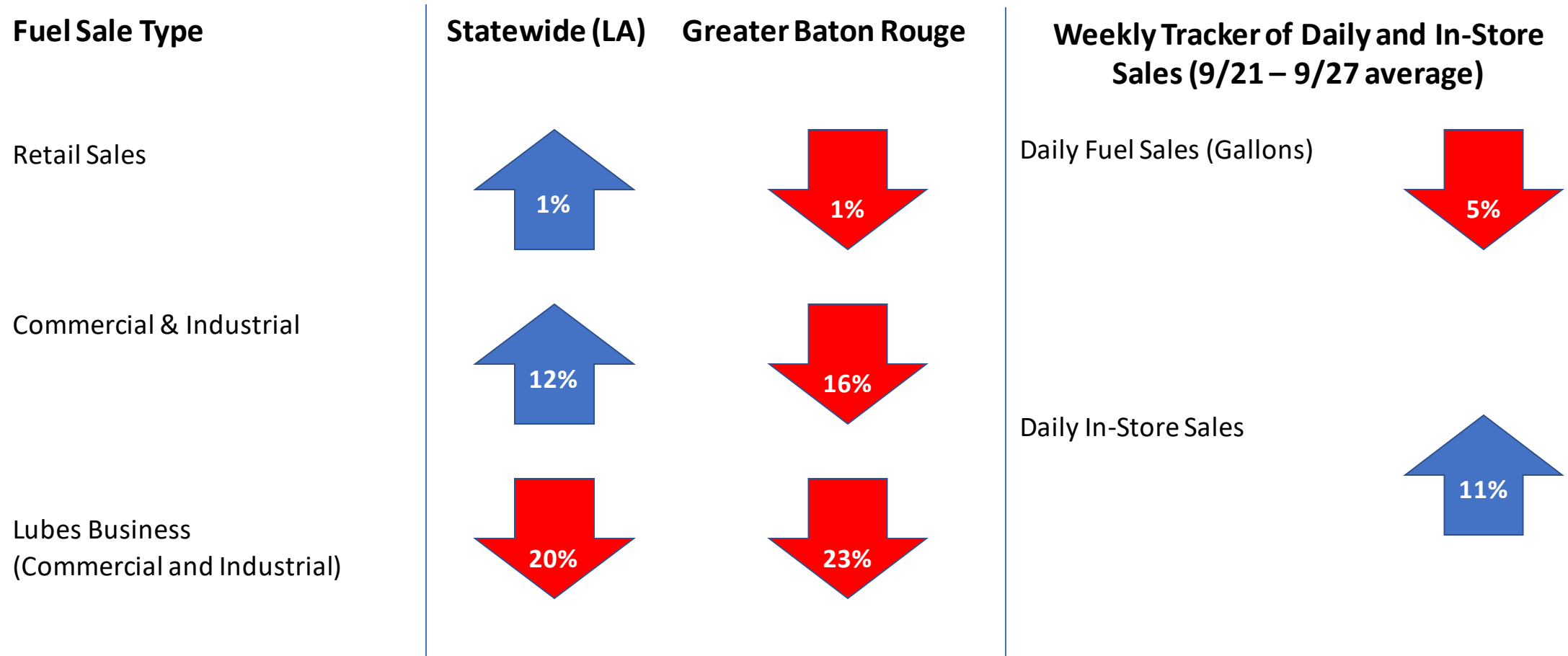
Parish	09-12-2020	09-19-2020	09-26-2020
Ascension	5,161	4,912	4,591
East Baton Rouge	24,380	23,151	21,538
East Feliciana	672	624	589
Iberville	1,875	1,848	1,722
Livingston	4,855	4,624	4,288
Point Coupee	945	872	825
St. Helena	464	441	437
West Baton Rouge	1,299	1,240	1,167
West Feliciana	291	292	285
BR MSA total	39,942	38,004	35,442

- Combined weekly claims have dropped for the tenth consecutive week and are down 39% in that timeframe.
- Continued claims were down more than 7% over the week and fell in every Capital Region parish.
- Weekly claims are down from a high in April of over 64,000, but still much higher than the week before the pandemic, which saw fewer than 2,200 claims.

Sources: Louisiana Workforce Commission, BRAC Analysis.
 Dates signify initial plus continued claims for week ending on that day.

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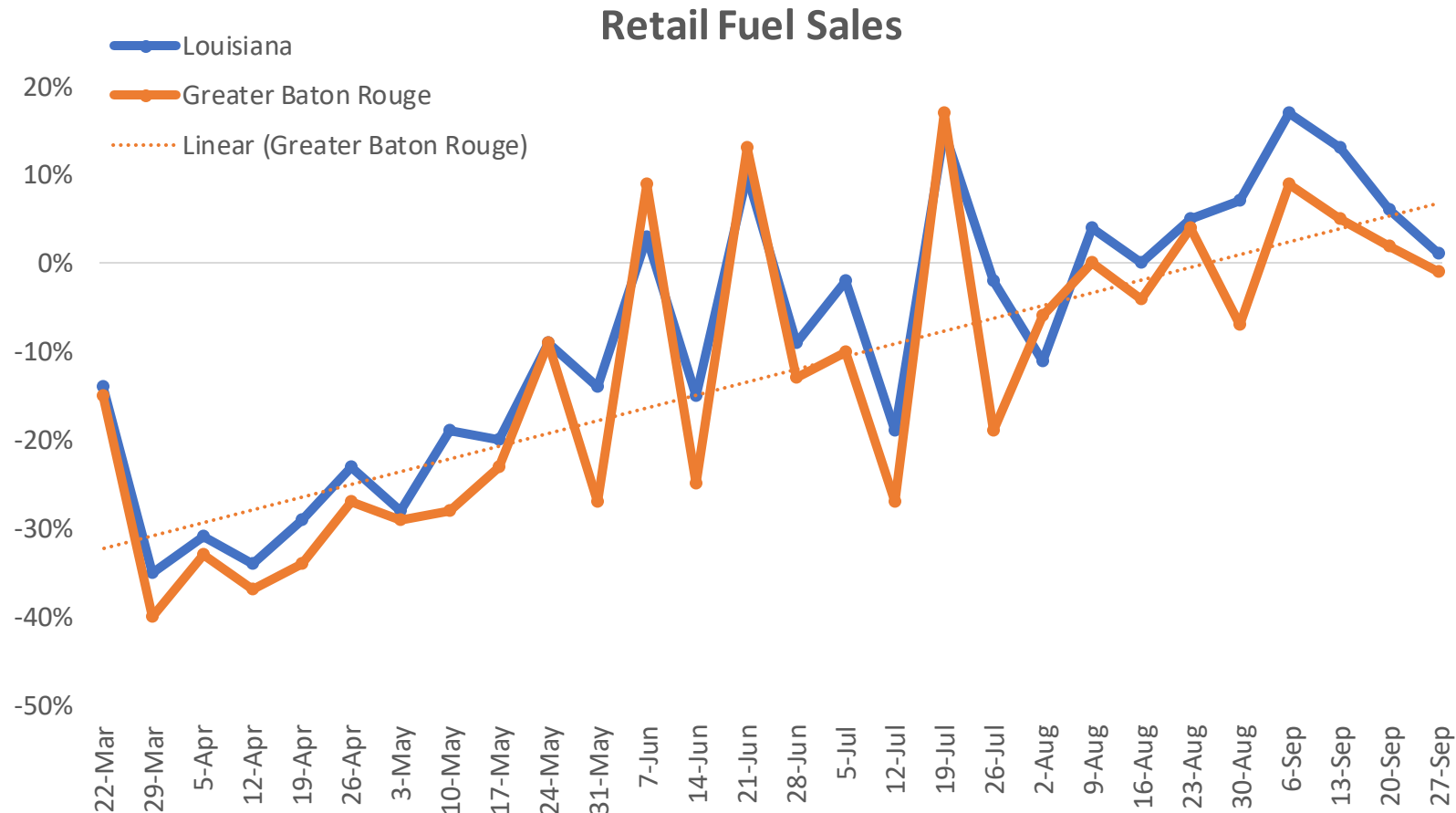
How have fuel sales (gas stations) been impacted during the pandemic?



Fuel sales reflect change in Lard Oil sales year-over-year from September 21 to September 27, 2020 compared to similar week in 2019.

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Retail fuel sales progression in Louisiana and Greater Baton Rouge during the pandemic.



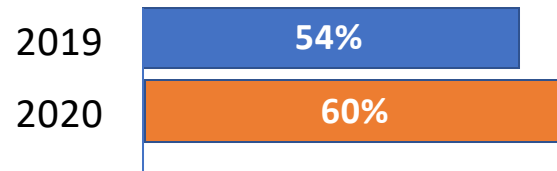
- Retail fuel sales were virtually identical to the same week last year, indicating there may be consistency in the market after the effects of the storms subsided.
- This was the first week in a month that fuel sales for 2020 were lower than 2019 in the Baton Rouge metro.

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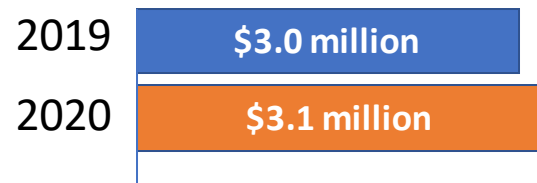
How has travel been impacted during the pandemic?

Hotel Occupancy

September 20 – September 26



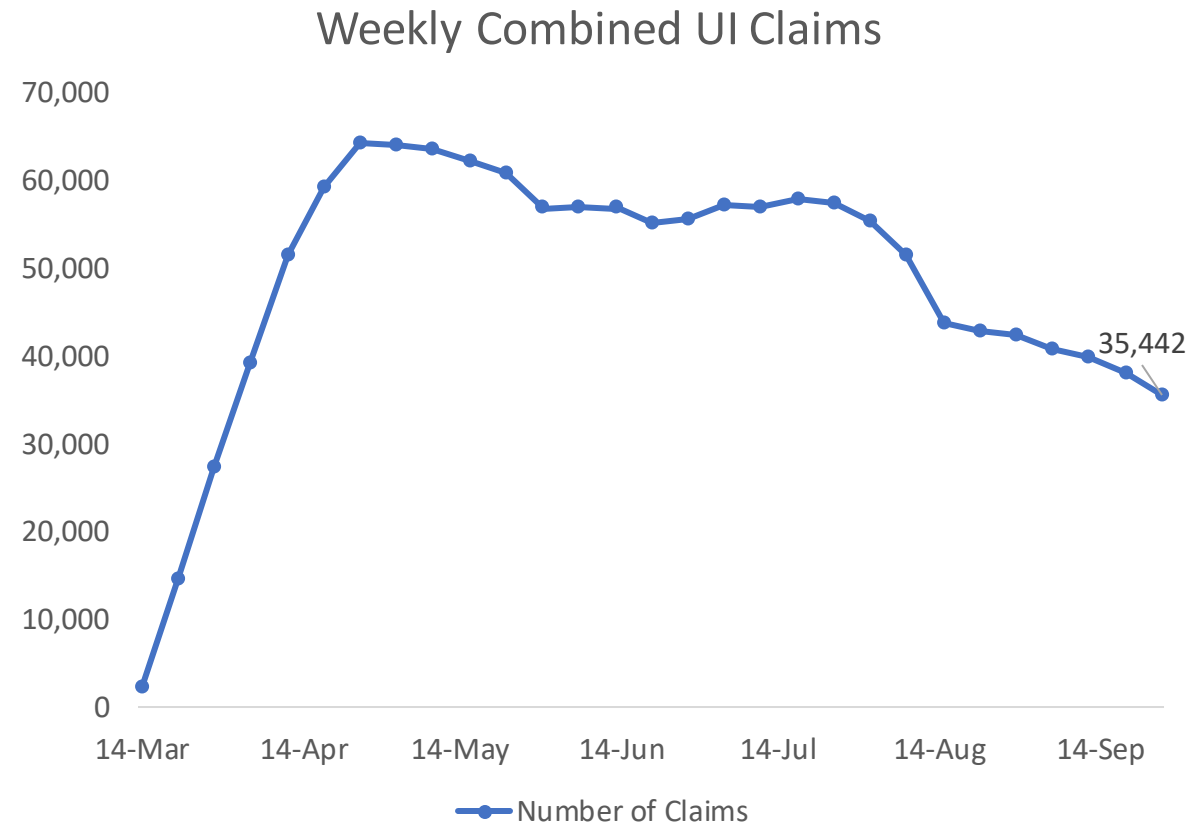
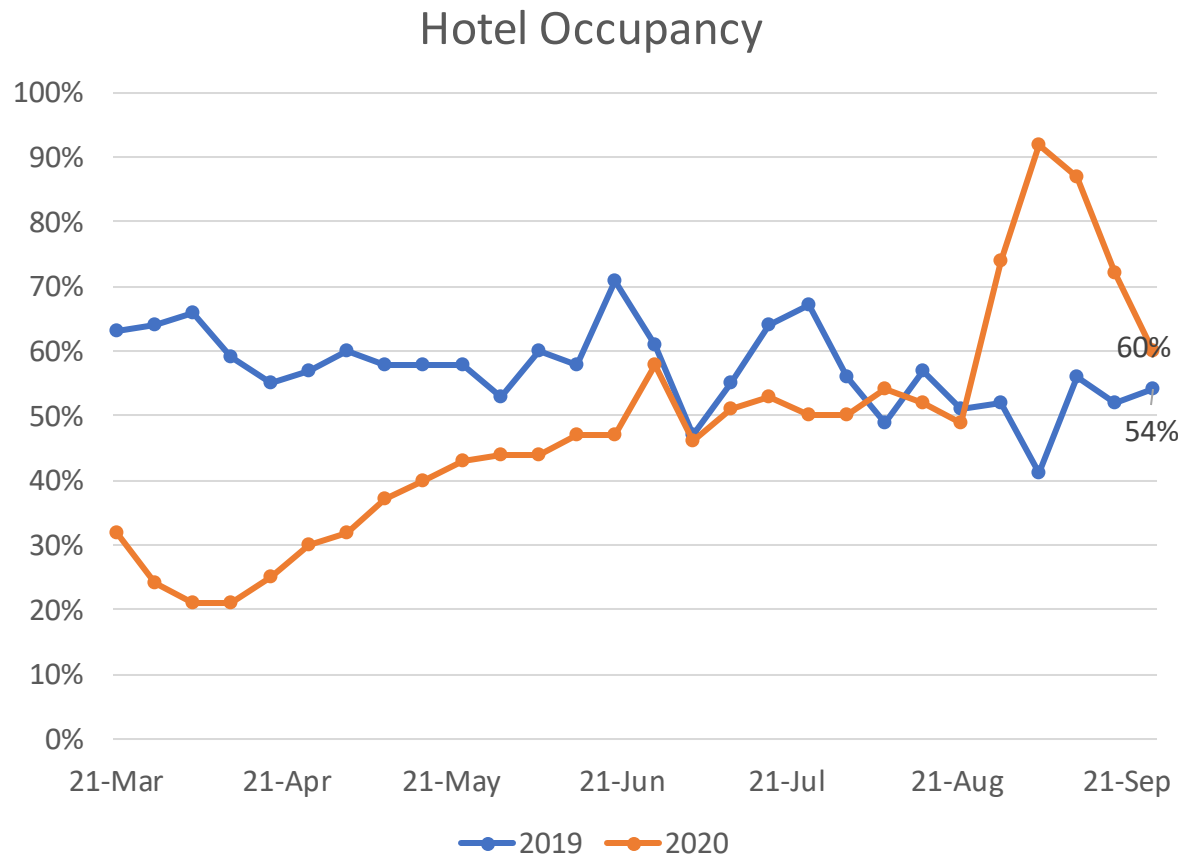
Revenue September 20 – September 26



- 2020 occupancy rates dropped significantly as some evacuees returned to their homes but are still above 2019 numbers for the fifth week in a row.
- Revenues are also slightly higher over-the-year for the last week.
- A recent national survey of hotel owners found that 67% say they could not survive another six months at current occupancy levels, implying that the uptick over the last month may have been crucial for local hotels.

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While hotel occupancy remained high due to evacuees, unemployment claims are still about 14 times higher than a normal week.



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How has travel been impacted during the pandemic?

CATS Transportation Ridership

Week Ending	2019 Ridership	2020 Ridership	%age Change
April 25th	46,838	15,846	-66.2%
May 30th	47,289	21,115	-55.3%
June 20th	46,730	23,944	-48.8%
July 4th	46,773	22,558	-51.8%
August 15th	50,714	25,192	-50.3%
September 12th	53,930	23,503	-56.4%
September 26th	52,590	24,134	-54.2%
October 3rd	55,906	25,725	-54.0%

- CATS ridership continues to be well below 2019 numbers, although last week was the highest in the COVID-era.

Residential Travel

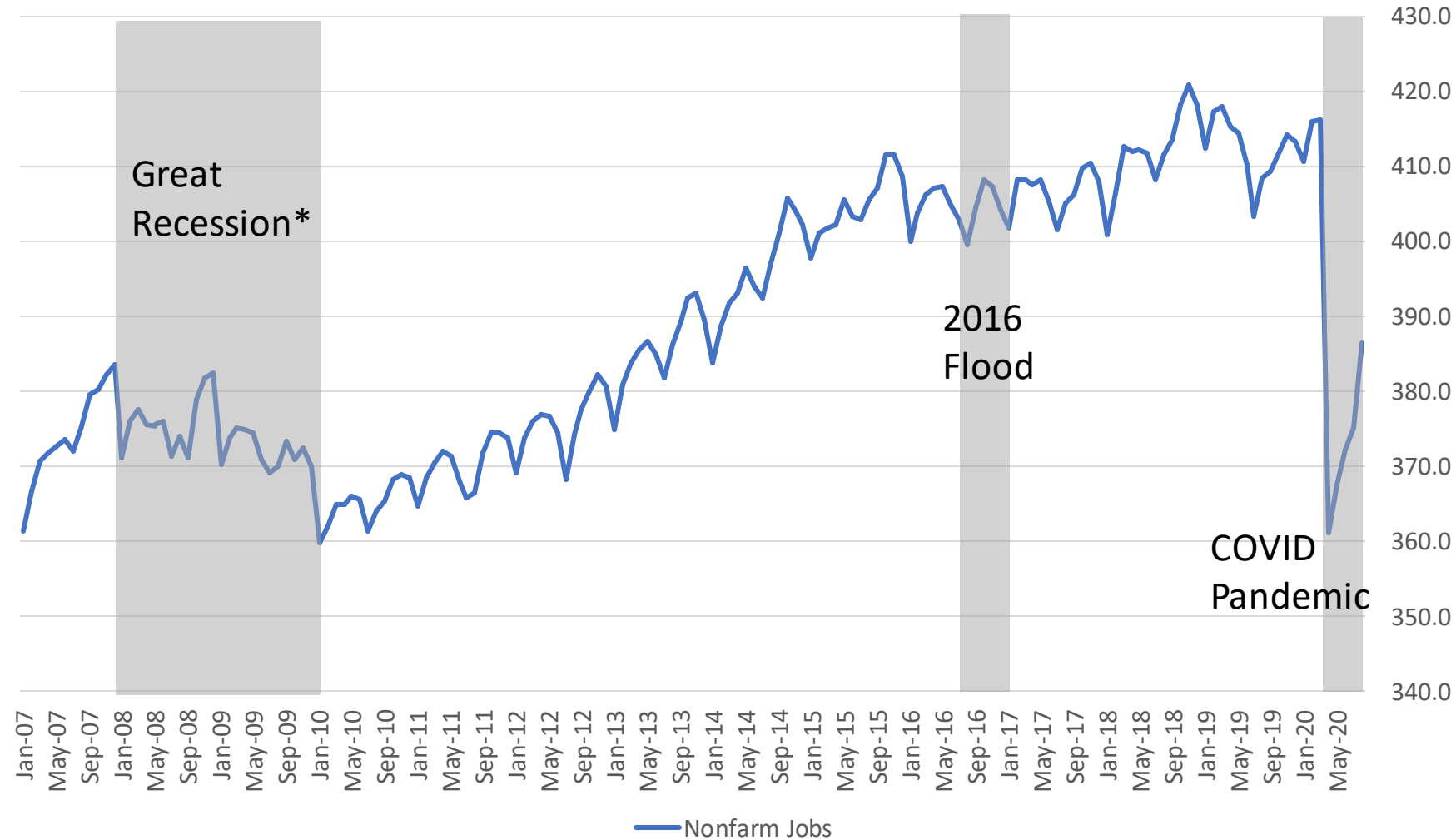
Parish	Retail & Recreation	Grocery and Pharmacy	Parks	Transit Stations	Workplace	Residential
Ascension	+2%	+3%	-	-	-15%	+2%
East Baton Rouge	-16%	-3%	-9%	-25%	-19%	+3%
East Feliciana	-	-	-	-	-27%	-
Iberville	-	-8%	-	-6%	-16%	+6
Livingston	-10%	+4%	+1%	+15%	-12%	+1%
Point Coupee	-	-	-	-	-7%	-
St. Helena	-	-	-	-	-19%	-
West Baton Rouge	-8%	-6%	-	-16%	-11%	+8
West Feliciana	-	-	-	-	-22%	-

- While other travel was static, all larger parishes saw an increase in workplace travel.

Source: Google Mobility Change Report, September 27th, 2020; Capital Area Transit System.

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The region added 11,400 jobs in August, but losses are still higher than the height of the Great Recession.



Major BR MSA Job Losses

- Great Recession* (12/07 – 1/10): -6.2%
- 2016 Flood (8/16): -1.0%
 - Led to lower job count in high-employment times like holidays
- 2020 Covid-19 Pandemic (3/20 – 8/20): -7.2%
 - -13.2% in April
 - -11.1% in May
 - -10.5% in June
 - -9.5% in July

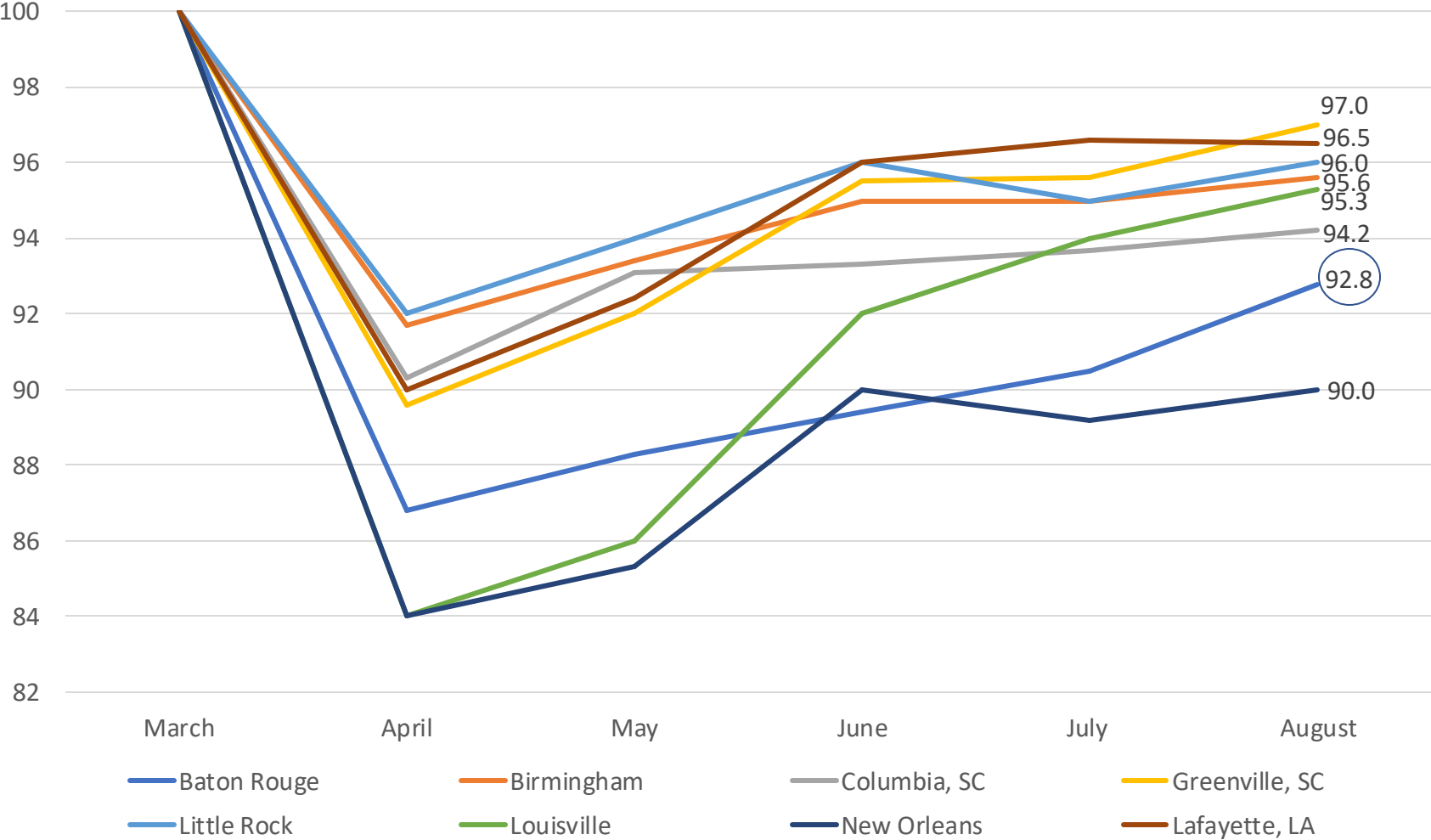
Source: BLS, LWC, BRAC Analysis.

*Technical dates of the recession are 12/2007 to 6/2009, but greatest negative job effects felt in Baton Rouge metro area in 1/2010

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The Capital Region has higher job loss in Leisure & Hospitality and Construction than its peers.

Metro Area Employment Index



- Job recovery in Baton Rouge and New Orleans has lagged that of out-of-state peers, as well as Lafayette.
- Part of this is due to state COVID policy – Louisiana has more restrictive regulations on bars and restaurants than other states in the region, and that sector is a third of jobs lost.

Source: BLS, BRAC Analysis.

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Leisure & Hospitality, Construction, and Government jobs have not yet recovered from pandemic-related losses.

Major industries in the Capital Region

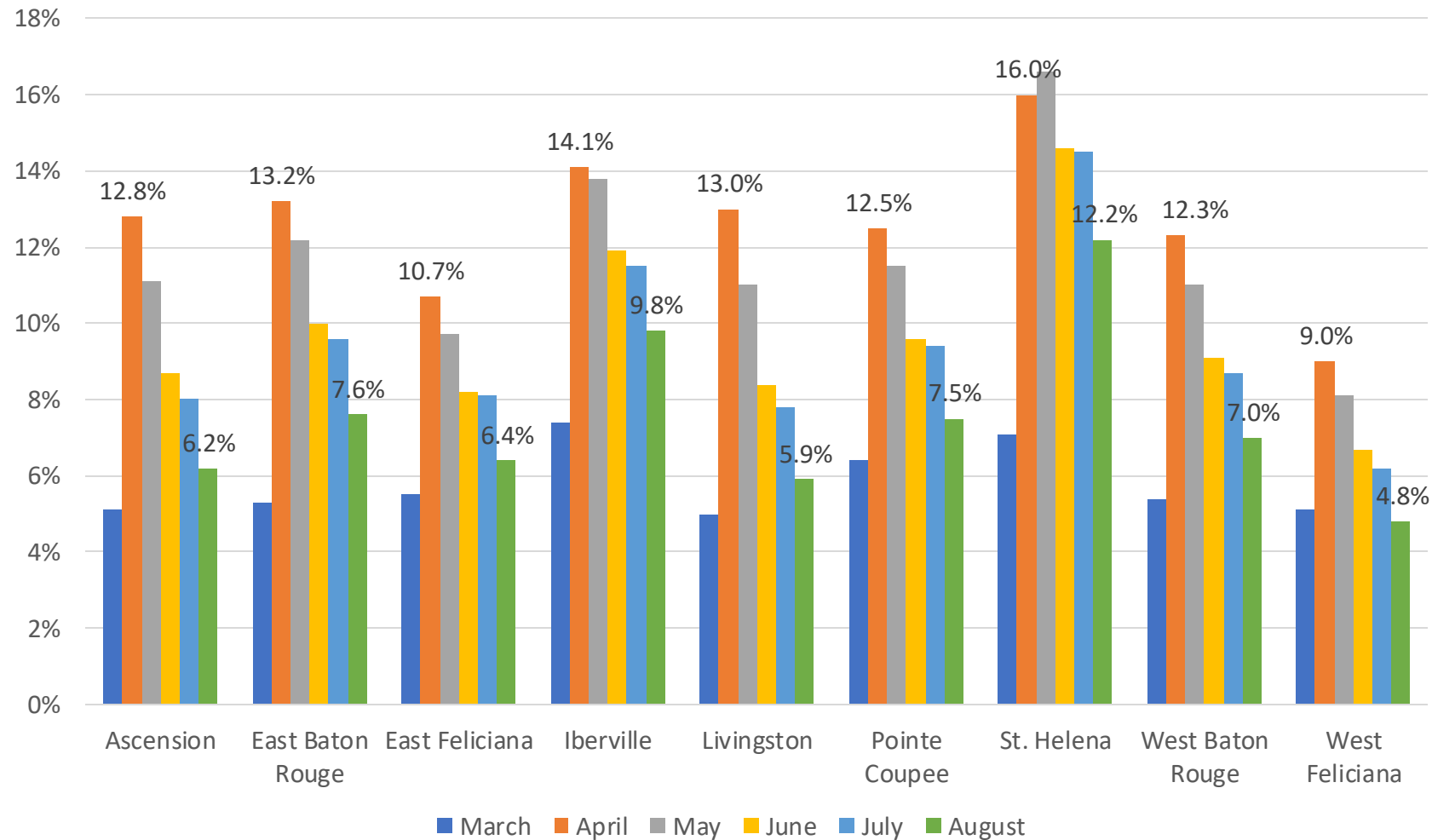
Industry	COVID Job Loss	%age Lost
Leisure & Hospitality	-9,400	-22.2%
Construction	-9,600	-18.2%
Government	-2,600	-3.4%
Manufacturing	-800	-2.7%
Professional Services	-2,300	-4.6%
Education & Healthcare	-2,400	-4.5%
Trade, Transportation & Utilities	-700	-1.0%

- The metro area added an astounding 11,400 jobs between July and August.
- Major movers were Government (+4,700), Leisure & Hospitality (+3,000), and Professional Services (+1,100).
- The majority of the 29,800 jobs still lost from the pandemic are in Leisure & Hospitality and Construction sectors. These sectors are limited due to government restrictions on their opening and uncertainty in the industrial space, respectively.

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There is significant variation between parishes concerning return to work.

Unemployment Rates by Parish



- Ascension and Livingston have made significant progress toward lowering unemployment to pre-pandemic rates, while West Feliciana's rate is lower than it was in March.
- All but two parishes have managed to bring rates down below the state and national rate.
- Considering the continuing restrictions on businesses in the state, rate drops this significant are a positive indicator for the Capital Region.