



**NE I-35 and Loop 410
Regional Center
Planning Team Meeting #6**

Thursday, August 1, 2019
Wayland Baptist University
7:45 AM



Cambridge Systematics, Inc.
Bowtie
Economic & Planning Systems, Inc.
Auxiliary Marketing Services
Mosaic Planning and Development Services
SIPA

Project Team

- Heather Yost, Project Manager
City of San Antonio
- Andrew Rutz, Project Manager
MIG, Inc.
- Krystin Ramirez, Senior Project Associate
MIG, Inc.
- Matt Prosser
Economic Planning Systems



Meeting Objectives

- Overview of **Vision & Goals**
- Review **Future Land Use Map Revisions**
- **Housing and Economic Development**
- Next Steps

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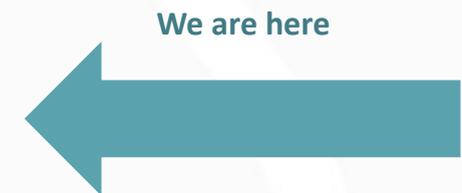
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Project Process and Schedule



Sub-Area Planning Project Phases

1	Analysis & Visioning Existing conditions; existing plans review; vision and goals; focus areas and corridors; Community Meeting #1	Early 2019
2	Plan Framework Develop plan elements; focus areas and key corridors; transformative projects; Community Meeting #2	Mid 2019 - Early 2020
3	Recommendations & Implementation Action and phasing strategies; draft Plan elements; Community Meeting #3	Late 2019 - Early 2020
4	Documentation & Adoption Public Hearings, adoption, final summary and ePlan	Early - Mid 2020



Overview of Planning Team Meetings in 2019

- ✓ **Meeting #1:** Kick-Off and Orientation; Sub-Area Plan Overview
- ✓ **Meeting #2:** Preliminary Identification of Opportunities of Challenges; Preliminary Visioning
- ✓ **Meeting #3:** Confirm Vision and Goals; Focus Areas and Corridors
- ✓ **Meeting #4:** Land Use (1 of 2)
- ✓ **Meeting #5:** Land Use (2 of 2)
- ➔ **Meeting #6: Housing and Economic Development Strategies (1 of 2)**
 - **Meeting #7:** Housing and Economic Development Strategies (2 of 2)
 - **Meetings #8 & #9:** Mobility
 - **Meeting #10:** Infrastructure and Amenities
 - **Meeting #11:** Transformative Projects; Design Character

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Overview of Analysis & Visioning

Draft Vision Statement

“The NE Loop 410 and I-35 Regional Center is a place where neighborhoods and businesses thrive and whose unique recreational, educational, and institutional assets draw residents and visitors alike. Its well-connected transportation networks integrate options for automobile, public transit, bicycle, and pedestrian travel allowing efficient access to everything the area has to offer – from entertainment, to parks and hike/bike trails, to businesses that meet day-to-day needs.

The Regional Center supports its traditional industrial base, embraces economic development that fosters a balanced mix of live, work, and play options, and evolves in a way that sustains and protects its natural systems and environment.”

Draft Goals

Goal 1: Encourage economic development and business diversity that nurture positive community identity.

Goal 2: Create a connected transportation network that integrates multiple modes of transportation - including automobile, public transit, bicycle, and pedestrian - to efficiently serve the needs of multiple audiences including area residents, workforce commuters, commerce and trade, and visitors.

Goal 3: Expand and connect greenspace, parks, and trails.

Goal 4: Promote community well-being and safety.

Goal 5: Support sustainable development practices that encourage stewardship of the natural environment, create healthy neighborhoods, and minimize the risk of flooding.

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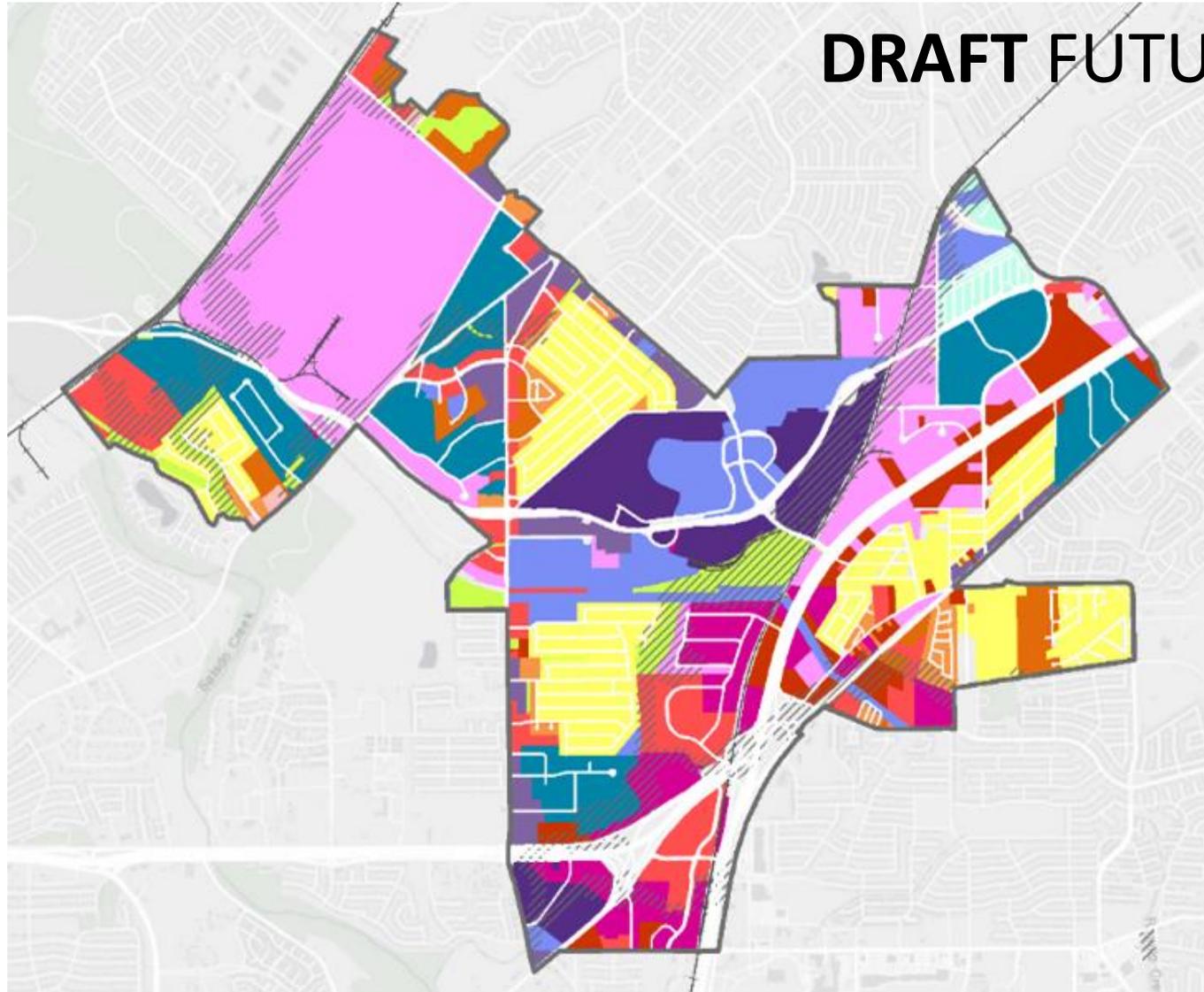
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Draft Land Use Map Changes

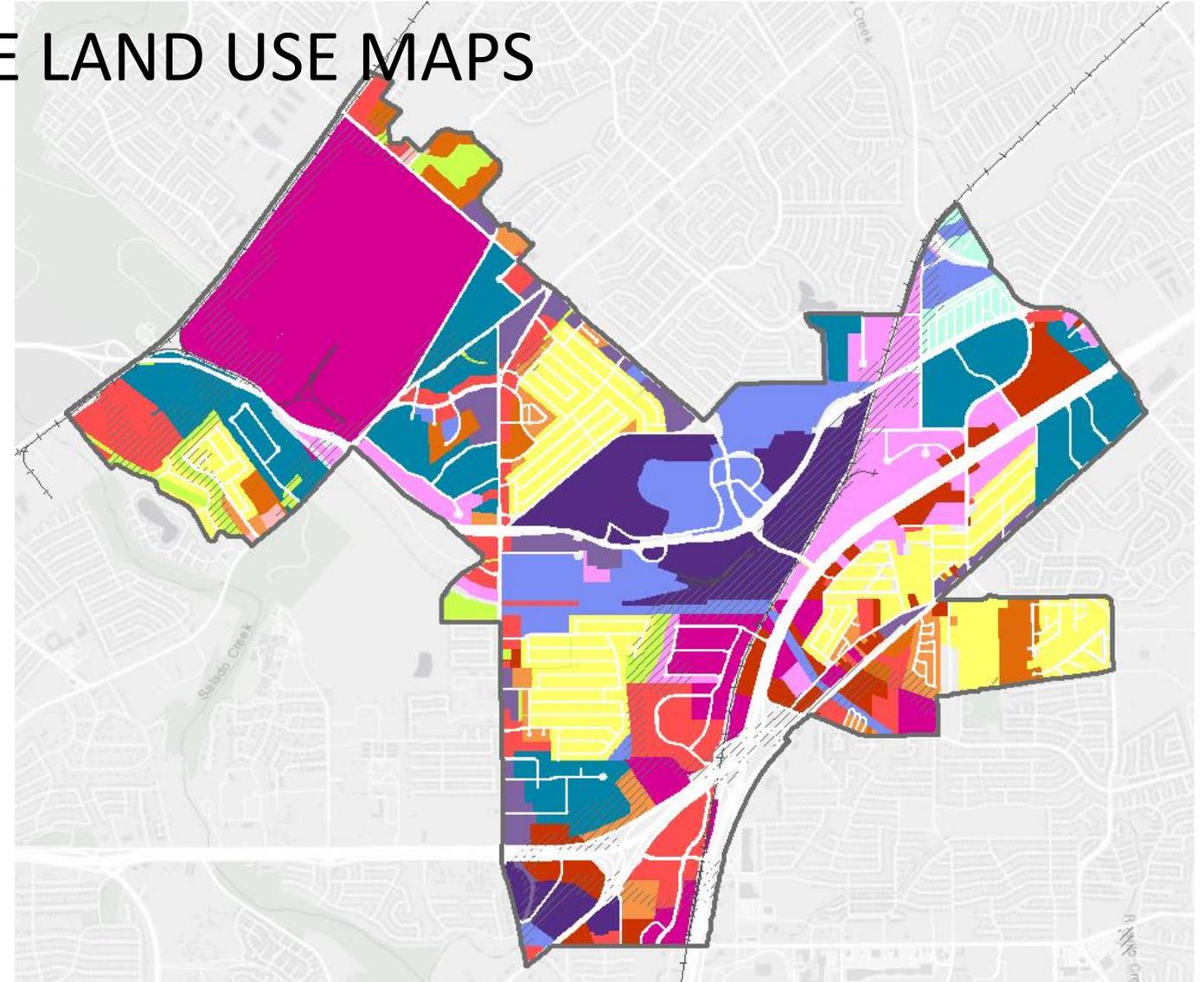


Revised Land Use Map

DRAFT FUTURE LAND USE MAPS

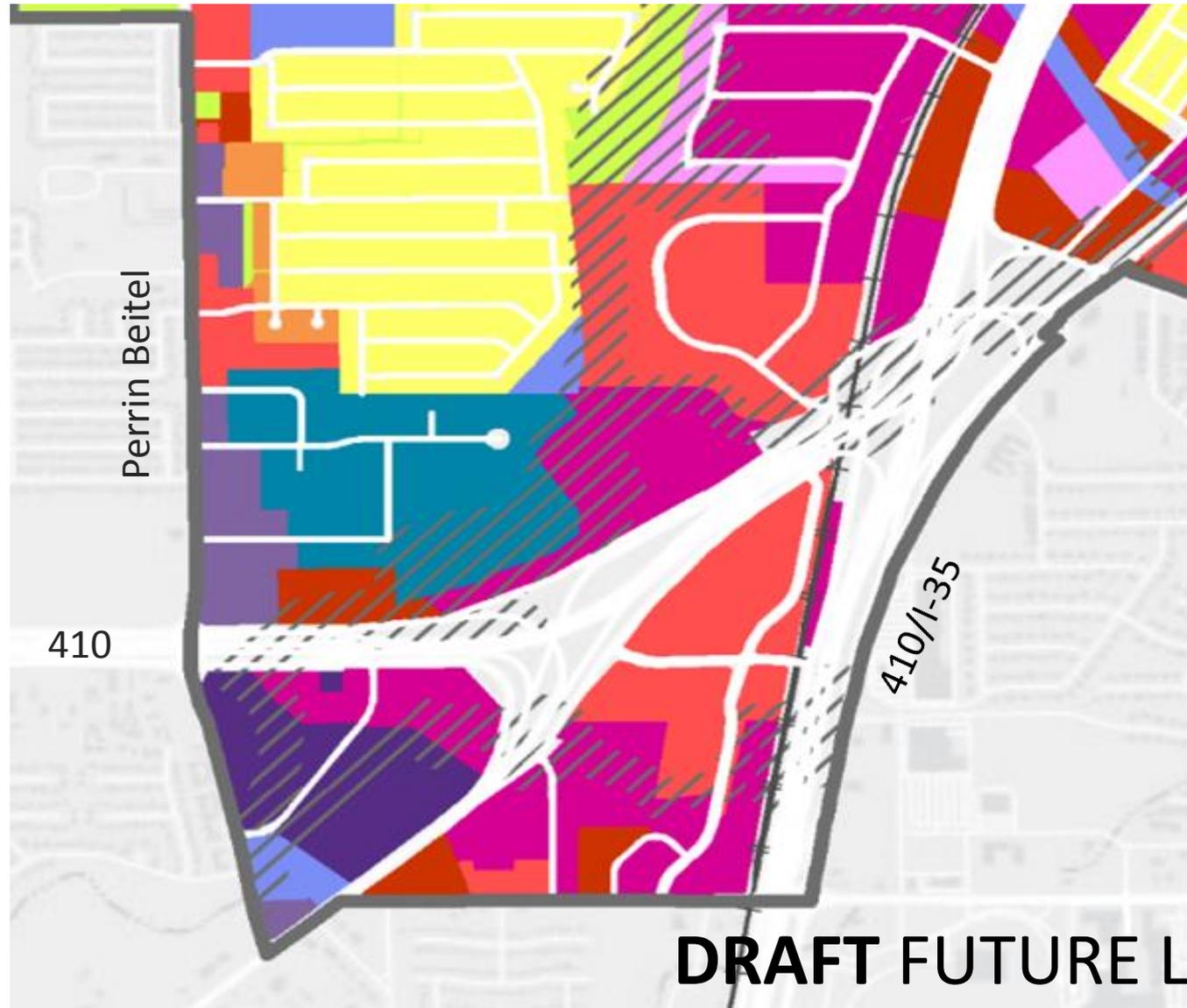


Draft Future Land Use Map (PT #5)



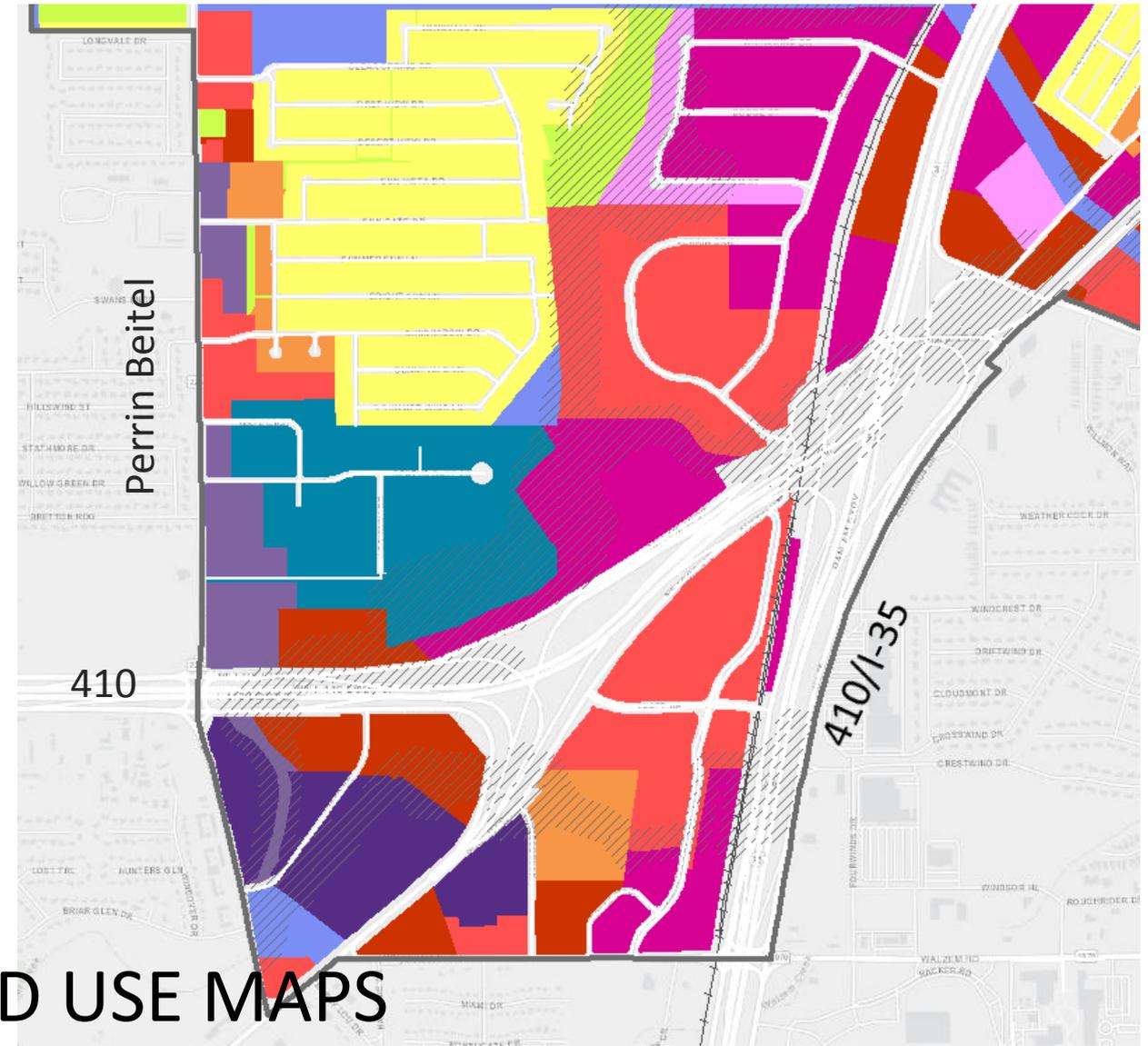
Draft Future LU Map (PT #6)

Loop 410 and I-35 Interchange



DRAFT FUTURE LAND USE MAPS

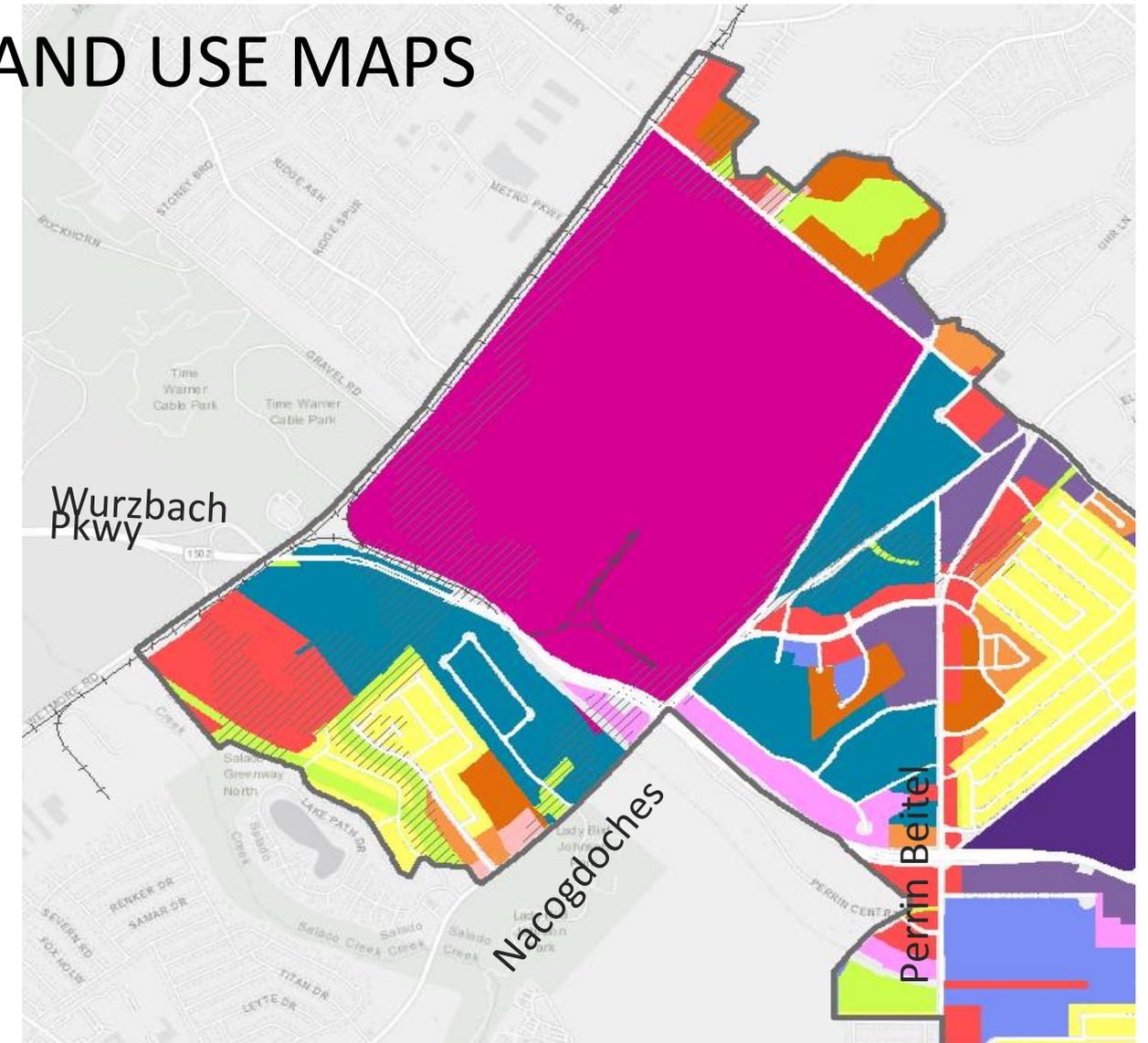
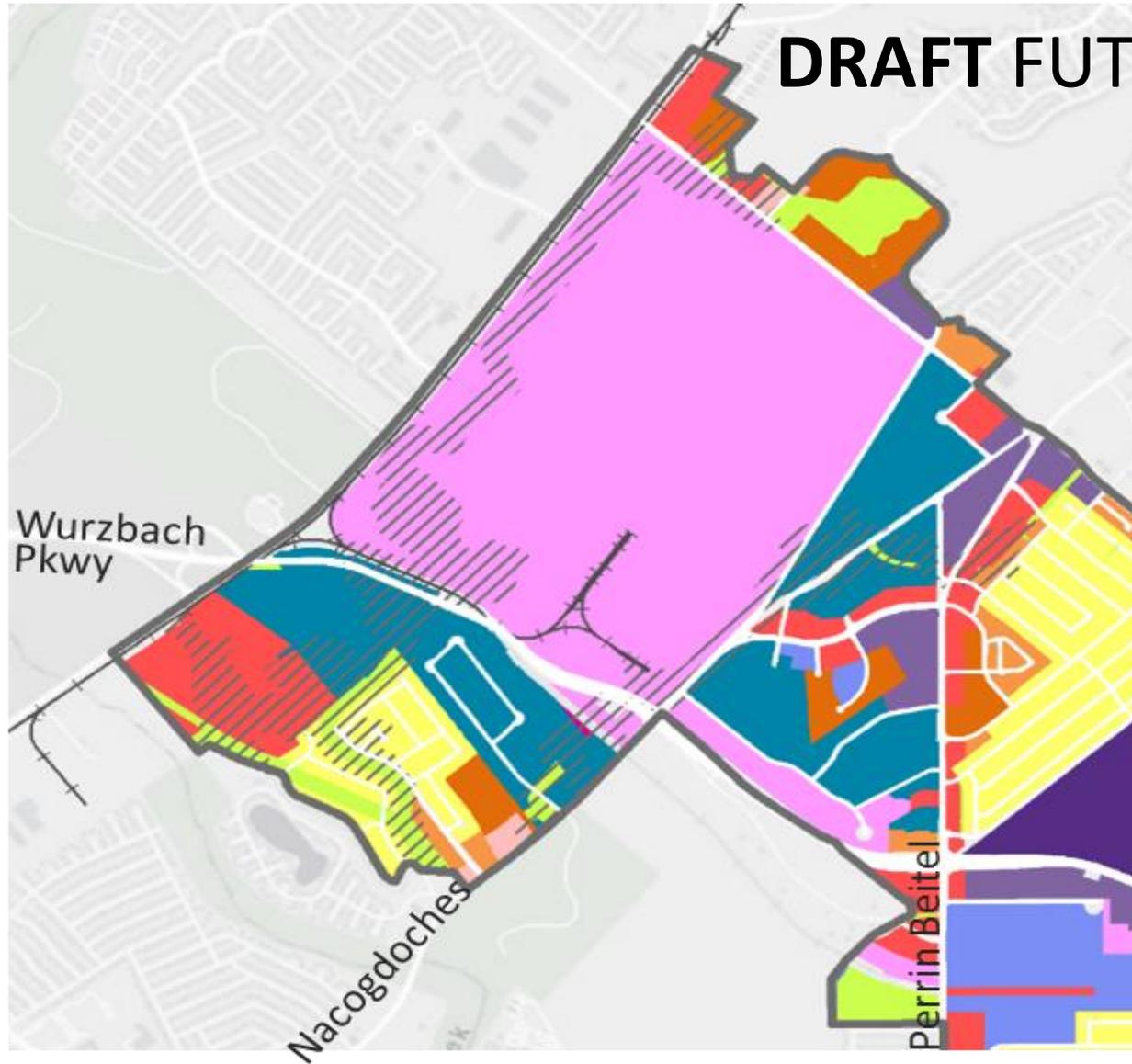
Draft Future Land Use Map (PT #5)



Draft Future Land Use Map (PT #6)

Western Segment of Wurzbach Parkway

DRAFT FUTURE LAND USE MAPS

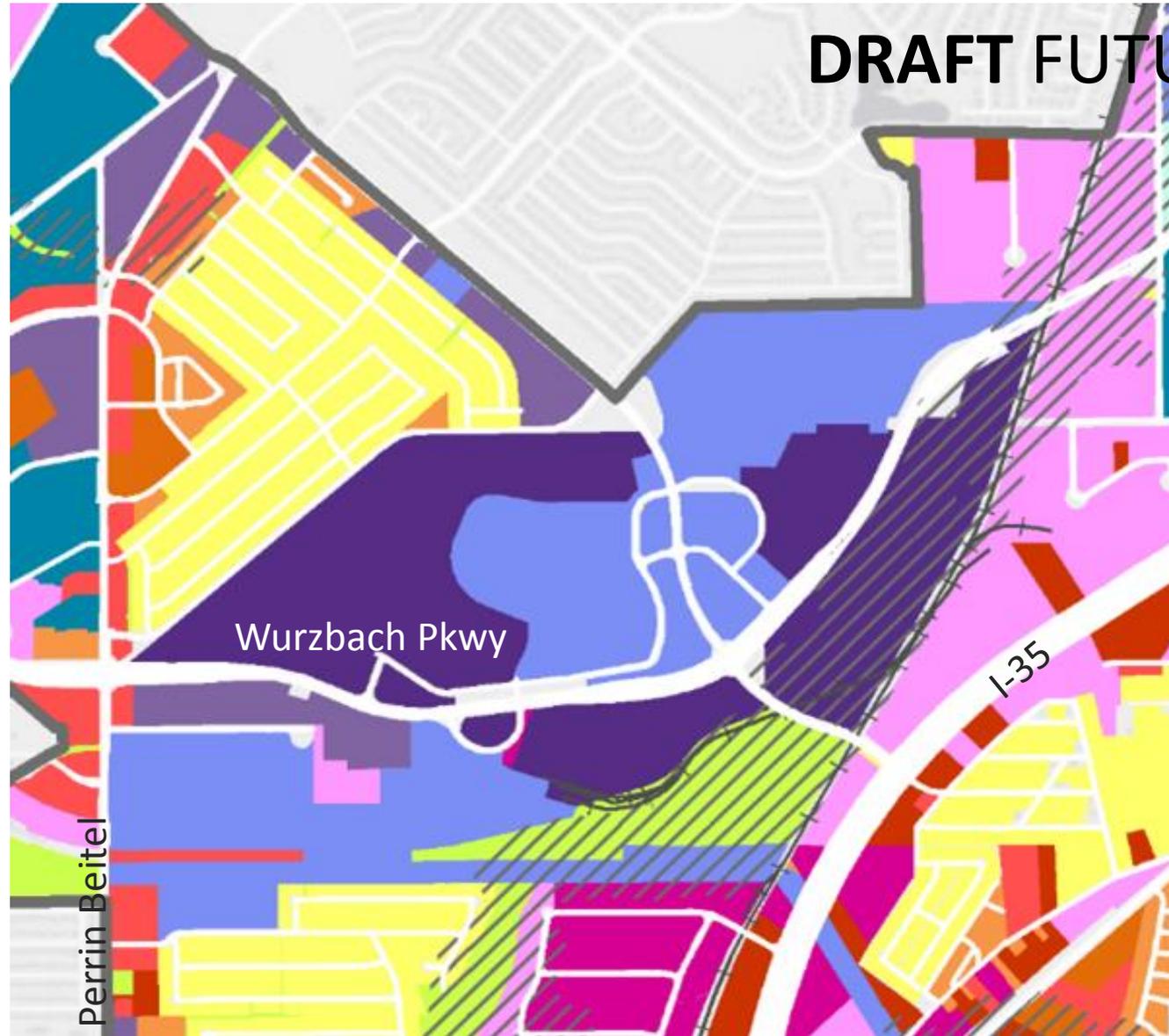


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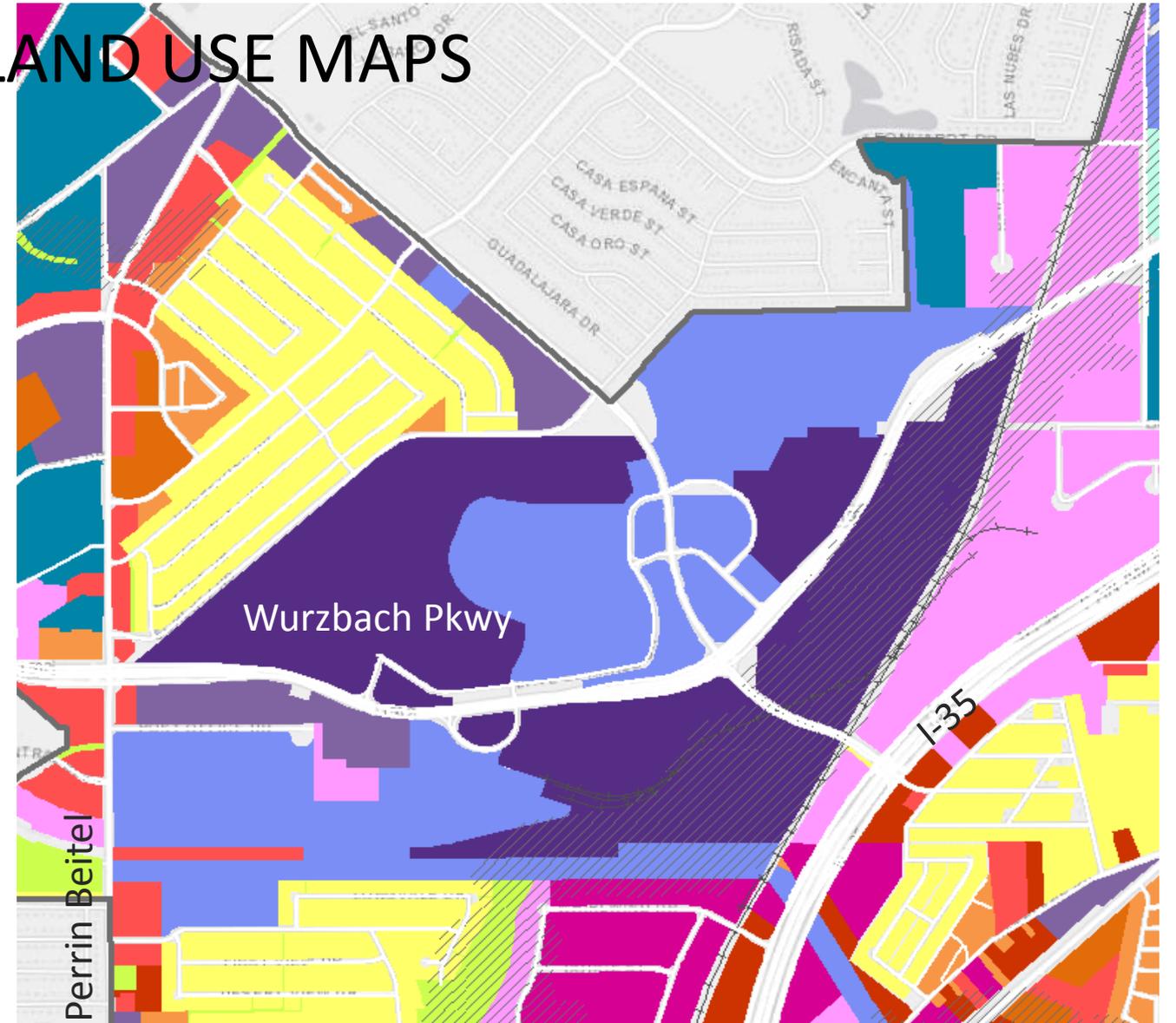
Draft Future Land Use Map (PT #6)

Wurzbach Parkway and I-35

DRAFT FUTURE LAND USE MAPS

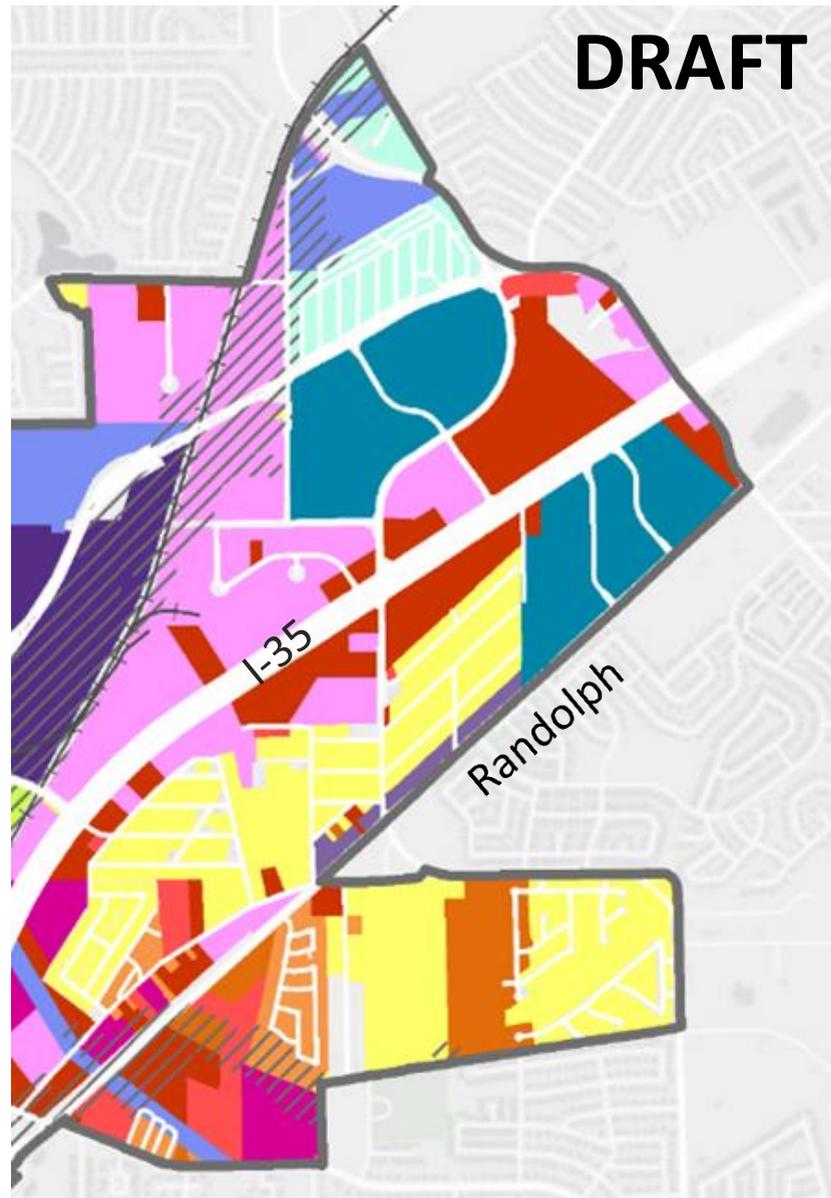


Draft Future Land Use Map (PT #5)

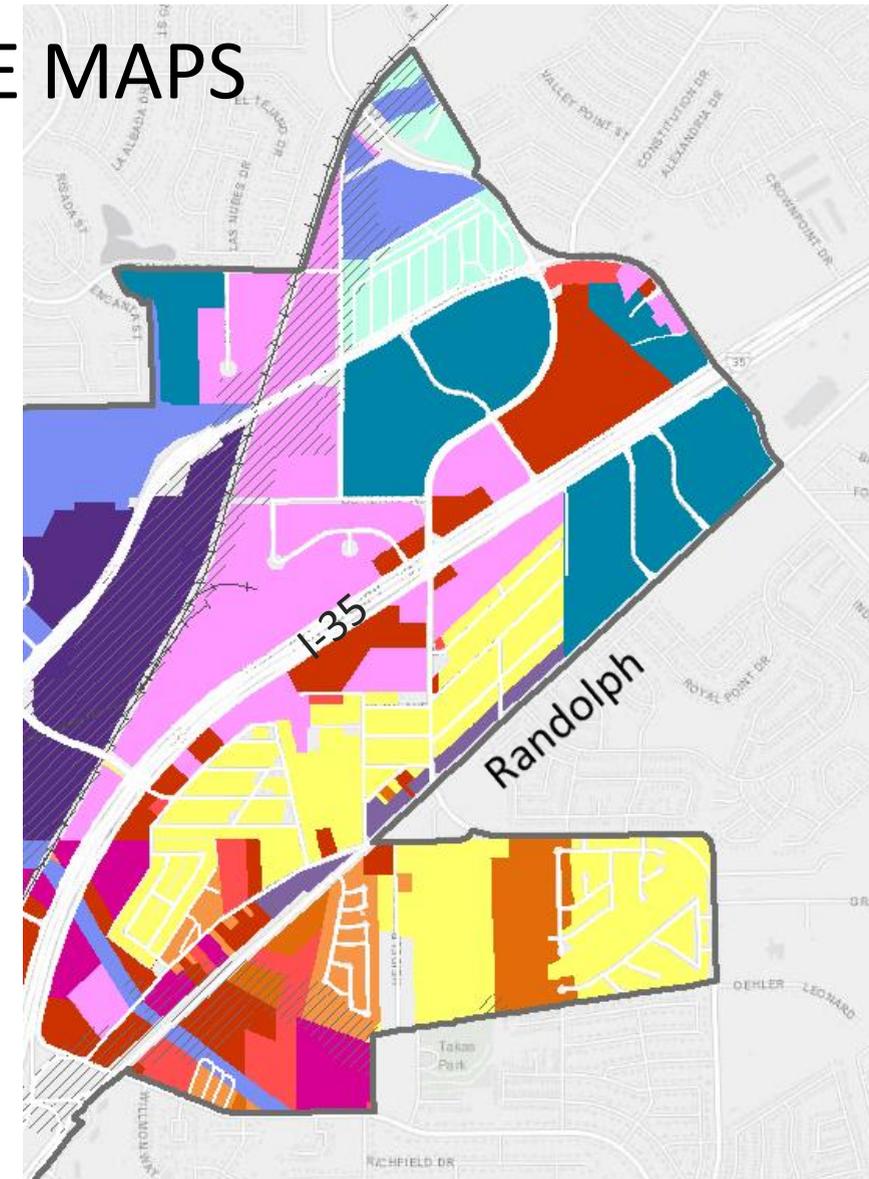


Draft Future Land Use Map (PT #6)

I-35 and Randolph Boulevard



Draft Future Land Use Map (PT #5)



Draft Future LU Map (PT #6)

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Housing & Employment Conditions Overview

Housing Overview

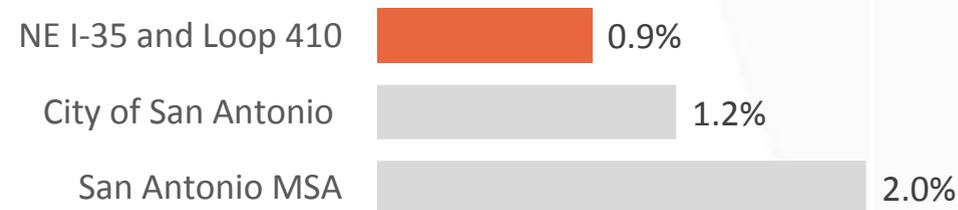
Total Population (2018) | **14,104**
Total Households (2018) | **5,571**

2.53 persons
Average Household Size
2.71 City of San Antonio Average

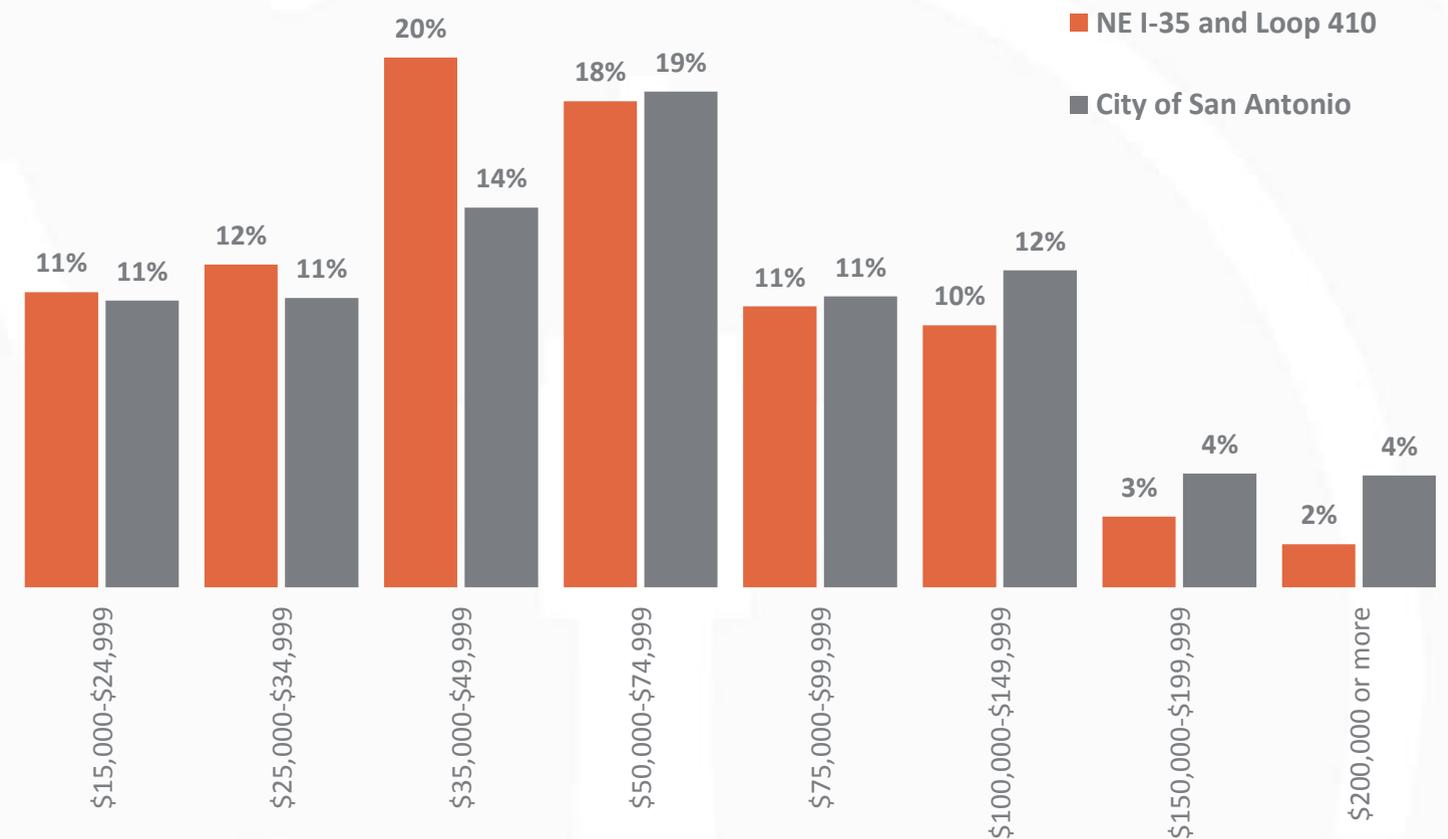
31% one-person households
29% City of San Antonio Average

34% non-family households
35% City of San Antonio Average

Annual Household Growth | 2010-2018



\$ Household Income
Average HH income is **\$58,000**
17% lower than City of San Antonio

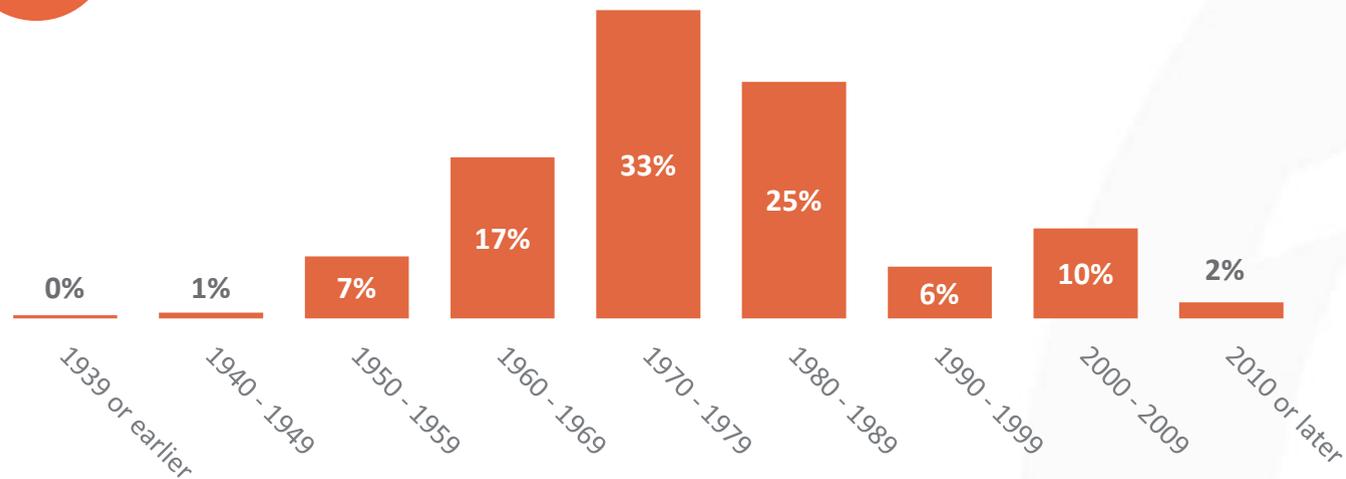


NE I-35 & Loop 410 has a **similar number of one-person and non-family** households to the City, and households have **lower household incomes** than the City overall

Housing Conditions

Total Housing Units (2018) | **5,790**

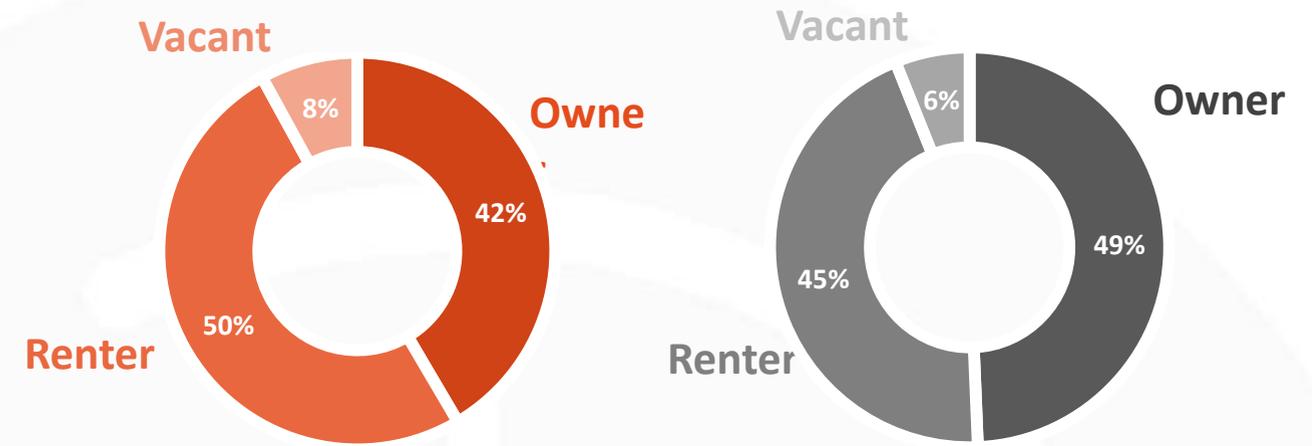
Age of Housing Stock



New Development

306 apartment units built since 2010

Tenure



55% of occupied housing units are rented
47% City of San Antonio Average

Units in Structure

47% of all housing units are single-family homes
64% City of San Antonio average

17% of all housing units are 5 to 9-unit apartments
7% City of San Antonio average

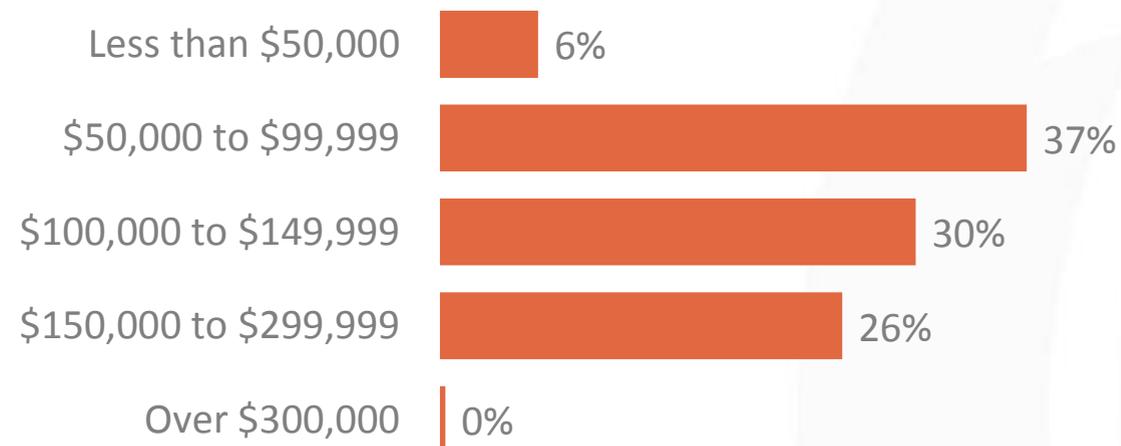
The housing stock is largely split between lower density single-family homes and low-rise apartments.

Housing Accessibility and Affordability



Owner-Occupied

37% of homes are valued between \$50,000 and \$100,000



Average home list price is around **\$130,000**
 City of San Antonio is around **\$300,000**

65% of households with a mortgage have housing costs that are affordable to a household earning the Citywide median income of **\$50,300**

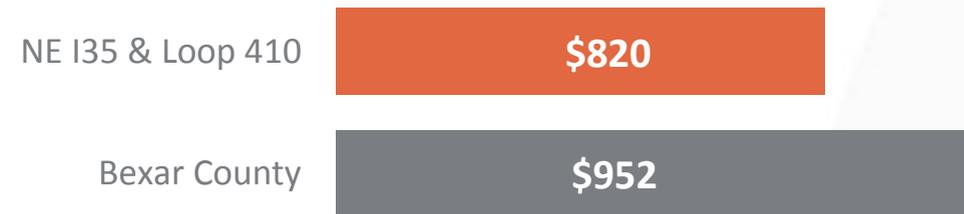
45% of homeowners do not have a mortgage
37% Bexar County average

Housing Accessibility and Affordability



Renter-Occupied

Average rent for Highway 151 apartments is **14%** less than the County average (CoStar data)



83% of rentals are **affordable** to a household earning the Citywide median income of **\$50,300** (Census data)

Since 2000, average monthly rents have increased by **\$260, 18% less** than the County overall

Average rent for new apartment units (built in 2017) is **\$1,229**

Housing in the I35 & Loop 410 Regional Center is less more expensive than the county-wide average

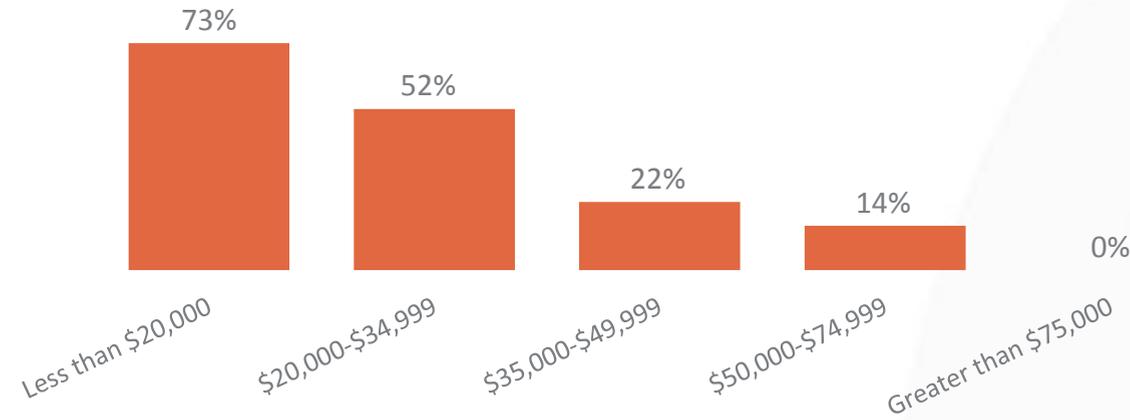
Cost Burden

17% of homeowners and **49%** of renters are **cost burdened**, paying more than 30% of income towards housing



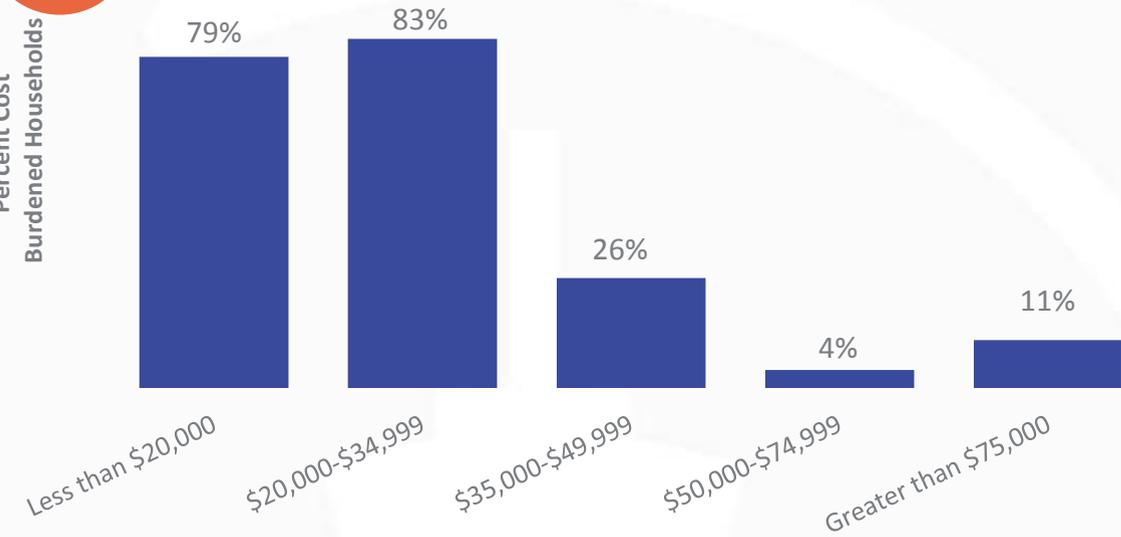
Owners

Percent Cost Burdened Households



Renters

Percent Cost Burdened Households



Cost Burden Change | 2000-2017



Housing Types and Affordability



Average Rental Rates for New Apartments = \$1,200 per month



Average Home Price for Existing Home (in the area) = \$193,000

Employment

Total Employment (2018) | **18,575**

Number of firms (2018) | **1,155**

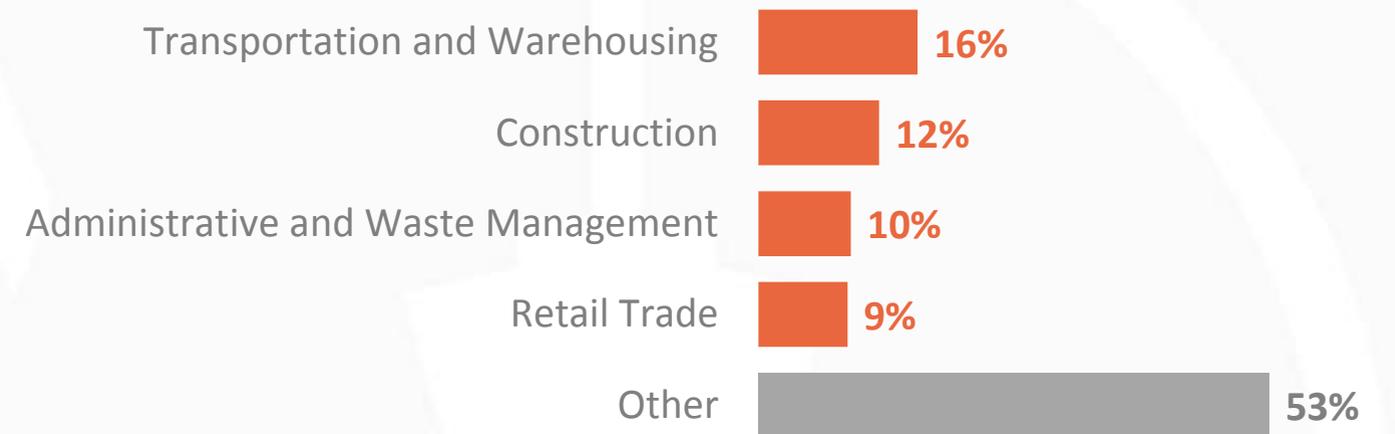
Average firm size | **16** employees

Employment Density | **4.2** jobs/acre

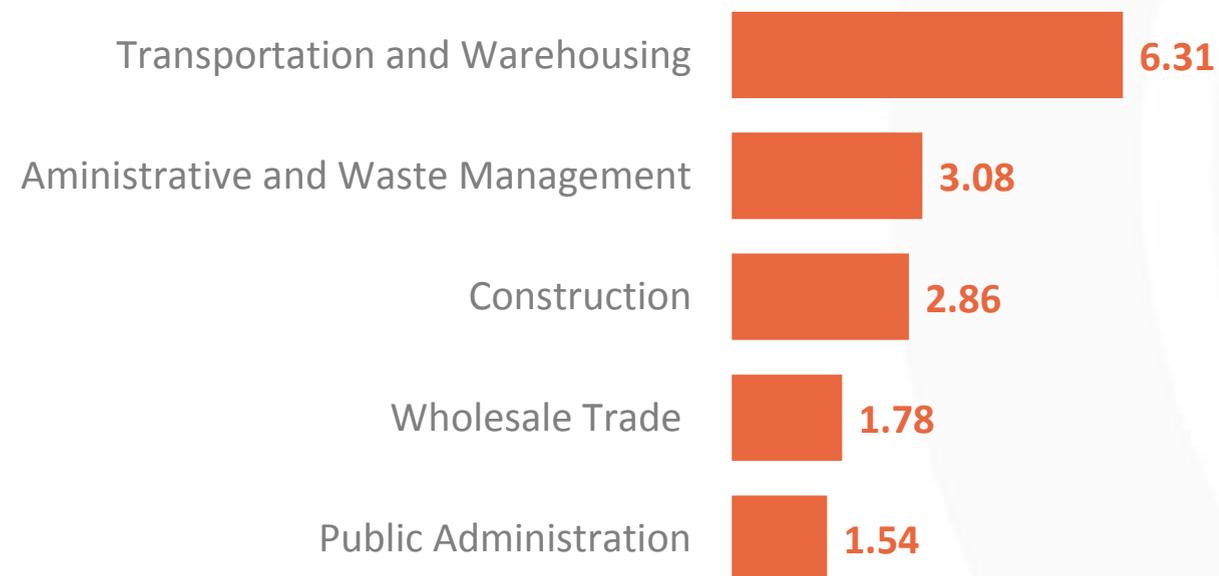


Largest Employment Sectors

**Transportation and Warehousing,
Construction, Admin./Waste Services**

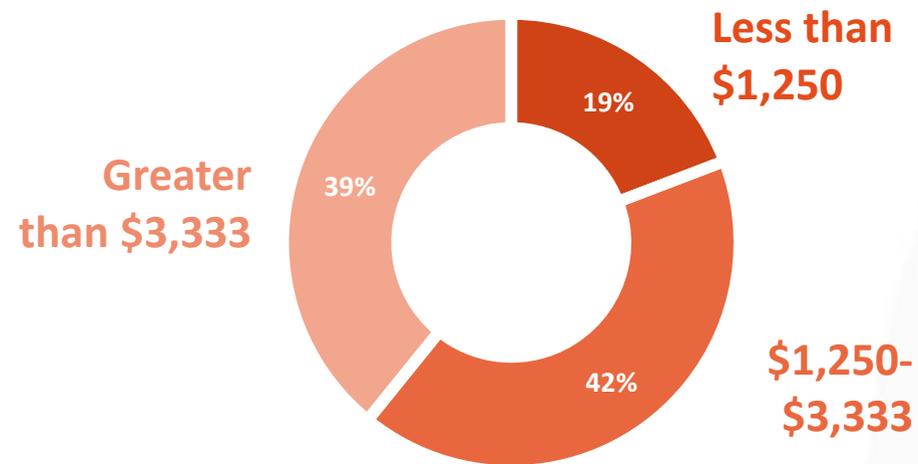


Industries Location Quotient

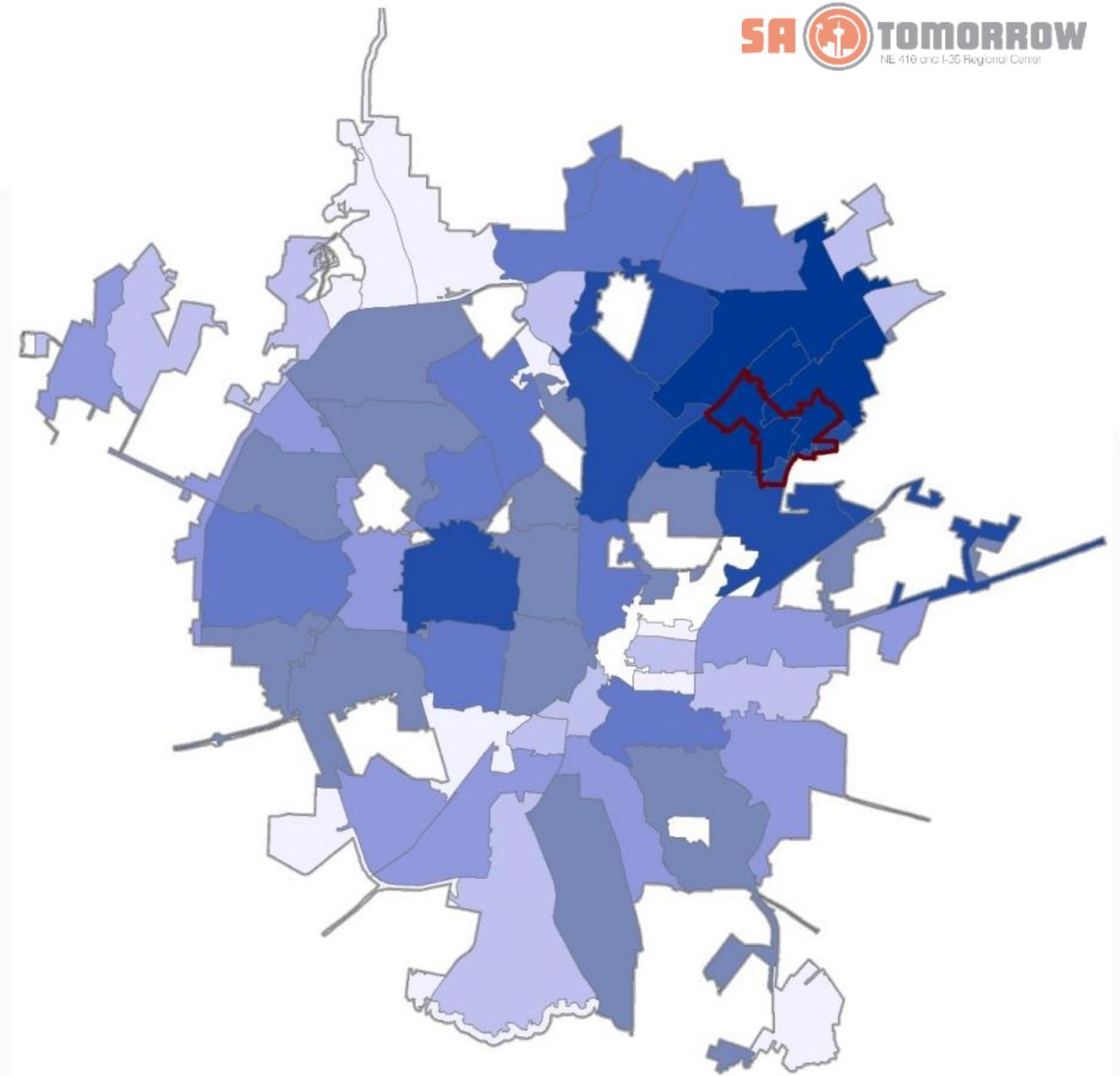
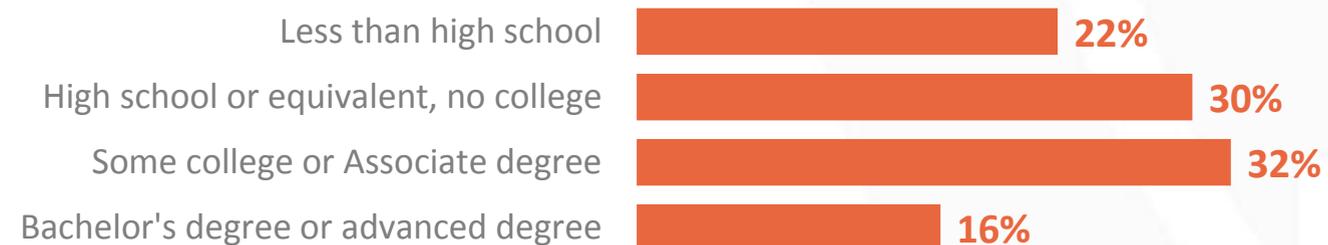


Workforce

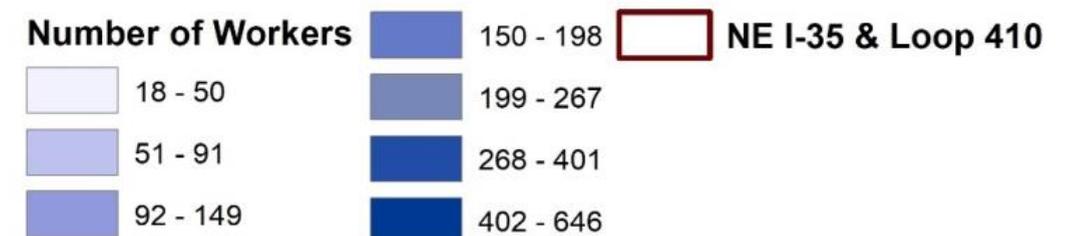
 Wage Distribution
39% of workers earn more than \$3,333 per month (\$40,000 annually)



 Education
48% of workers have some college or higher



Where NE-I35 and Loop 410 Workers Live



Real Estate Conditions

- Area continues to attract industrial and flex development
- Increase of destinations has started to revive hospitality and retail
- Aging office inventory

Commercial and Industrial Development



Industrial

4.3 million sq. ft. **5.4%** vacancy rate
 500K net new since 2005
 4.8% Bexar County average



Retail

2.3 million sq. ft. **8.7%** vacancy rate
 100K net new since 2005
 4.3% Bexar County average



Office

825K sq. ft. **21.6%** vacancy rate
 25K net new since 2005
 9.4% Bexar County average



Hotel

14 hotel properties; **1** new since 2005

Typical Jobs/Wages and Affordability

Occupation	Average Annual Wage	Est. HH Income	Affordable Rent (based on wages)	Affordable Home Price (based on wages)
Retail Salesperson	\$27,970	\$39,412	\$699	\$95,098
Transportation and Material Moving	\$35,560	\$50,107	\$889	\$120,904
Office and Administrative Support	\$36,520	\$51,460	\$913	\$124,168
Factory worker	\$39,294	\$55,369	\$982	\$133,600
Professor	\$72,879	\$102,694	\$1,822	\$247,789
Physical Therapists	\$80,420	\$113,319	\$2,011	\$273,428
Average for Area		\$58,000	\$820	\$130,000

Source: US BLS; CoStar; MLS

Desired Housing Future

- What are the **attractive/positive attributes** about housing in the NE 35/410 Regional Center?
- What housing types are **missing**?
 - What barriers to desired housing exists?
- What housing **challenges** exist?

Economic SWOT Discussion

STRENGTHS	OPPORTUNITIES
WEAKNESSES	THREATS

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Growth Allocation Game

Regional Center Growth Forecasts

- Employment should be the focus of centers with dense housing
- Regional Center Growth Goals:
 - **60% of Jobs (forecast is 50%)**
 - **20% of Housing Units**
 - **50% of Multifamily Units**

Share of Growth

Forecast Growth



Household Growth | 2010-2040

1,400 new housing units

47 new units per year



Employment Growth | 2010-2040

8,200 new jobs

273 jobs per year

Progress Metrics



New Development

306 housing units since 2010

Approx. 38 per year



New Employment since 2010

2,690 new jobs (US Census LEHD 2010 to 2015)

Approx. 538 jobs per year



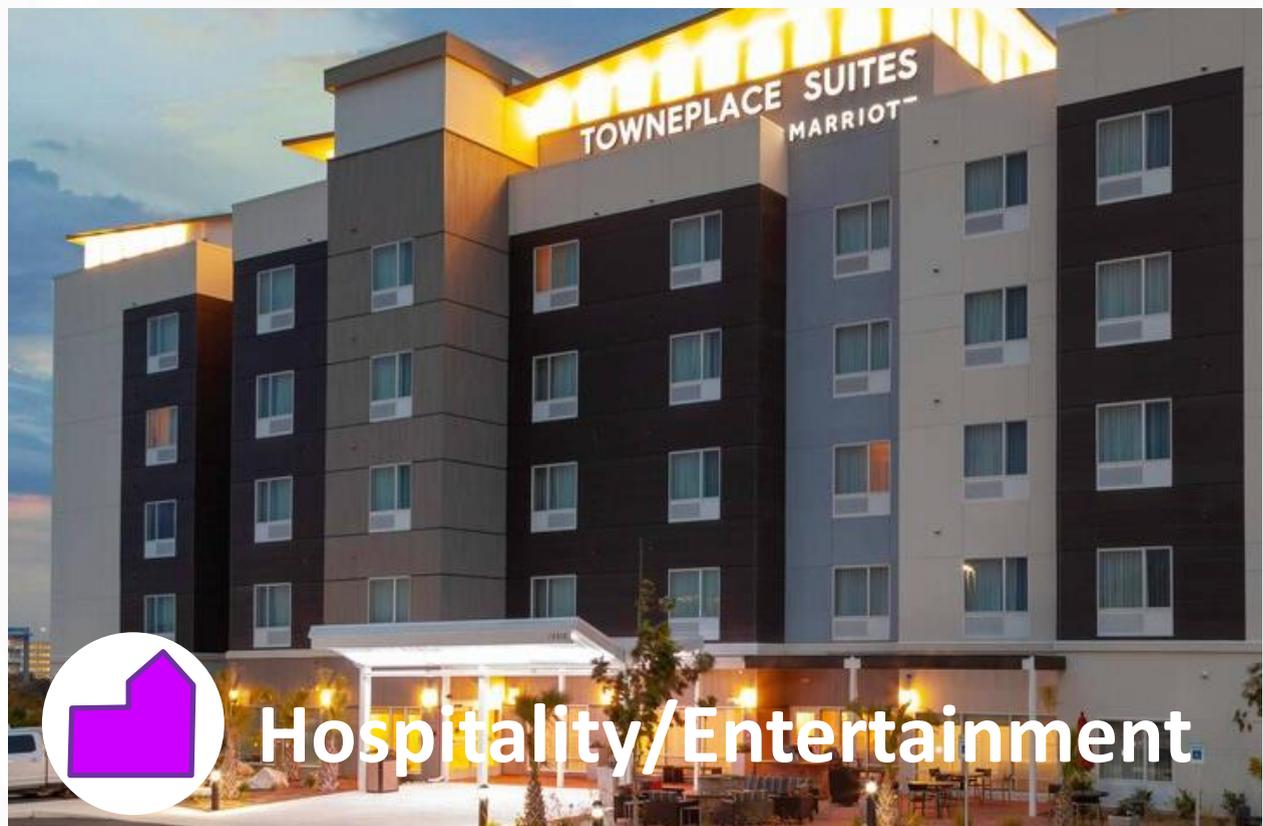
Retail



Industrial/Flex



Office/Education/Health



Hospitality/Entertainment

Employment Allocation

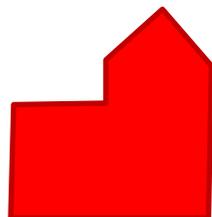


Retail

- Est. 750 jobs
- 1 piece = 250 jobs
- 10 acres per piece

Piece Color is **Red**

- 3 pieces to allocate

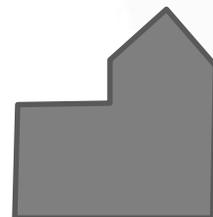


Industrial/Flex

- Est. 2,500 jobs
- 1 piece = 250 jobs
- 25 acres per piece

Piece Color is **Dark Grey**

- 10 pieces to allocate

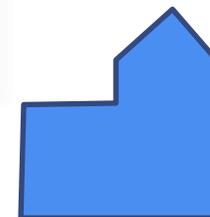


Office/Education/Health

- Est. 1,500 jobs
- 1 piece = 250 jobs
- 5 acres per piece

Piece Color is **Blue**

- 6 pieces to allocate

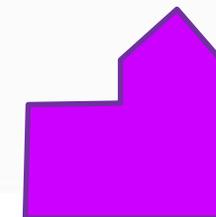


Hospitality/Entertainment

- Est. 750 jobs
- 1 piece = 250 jobs
- 5 acres per piece

Piece Color is **Purple**

- 3 pieces to allocate





Single-Family Detached



Attached/Townhomes



Garden Multi-family



Urban Multi-family

Housing Allocation



Single-Family Detached

- Est. 300 units
- 1 piece = 50 units
- 10 acres per piece

Piece Color is **Yellow**
(small)

- 6 pieces to allocate



Attached/Townhomes

- Est. 150 units
- 1 piece = 50 units
- 4 acres per piece

Piece Color is **Orange**
(small)

- 3 pieces to allocate

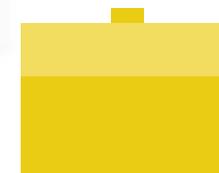


Garden Multi-family

- Est. 500 units
- 1 piece = 50 units
- 2 acres per piece

Piece Color is **Yellow**
(large)

- 10 pieces to allocate

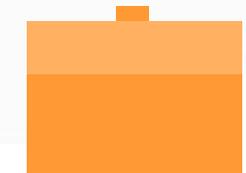


Urban Multi-family

- Est. 150 units
- 1 piece = 50 units
- 1 acres per piece

Piece Color is **Orange**
(large)

- 3 pieces to allocate



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Next Steps



Coming Up...

- **Planning Team Meeting #7: Housing & Economic Development Strategies Part II**

Wednesday, August 28th from 7:45 – 9:45 AM

- **Community Meeting #2: Vision, Goals, Draft Future Land Use, Housing and Economic Development Strategies, Mobility Input - Thursday, 19 September from 5:30 to 7:30 PM at the Tool Yard (NE Service Center), 10303 Tool Yard**



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