

The Dynamic Northeast Corridor Market Study



Prepared for the
City of San Antonio Department of Planning
and Community Development

Prepared by
Wendell Davis & Associates
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NORTHEAST CORRIDOR REVITALIZATION INITIATIVE

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NORTHEAST CORRIDOR REVITALIZATION INITIATIVE MARKET STUDY

Executive Summary

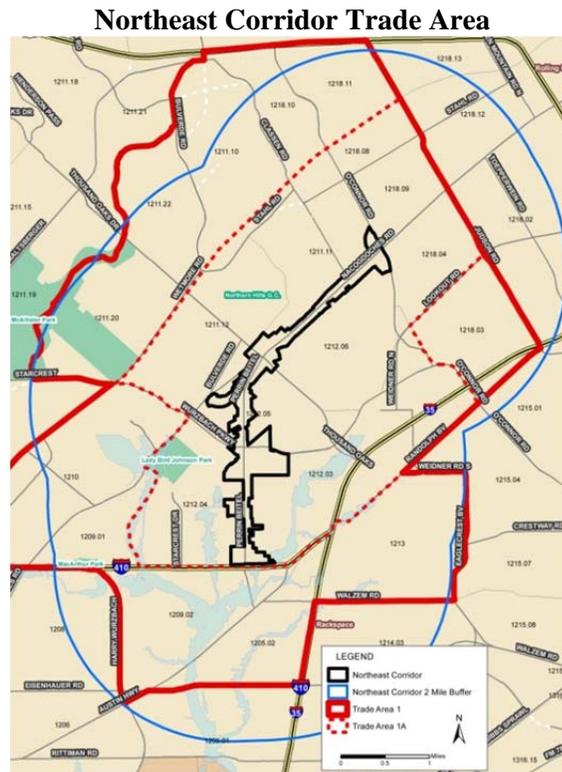
In July, Wendell Davis & Associates was selected to conduct the market study for the North East Corridor (NEC) Revitalization Initiative. Elements of the scope of services include Trade Area definition and Trade Area summaries of the demographic profile, consumer income and spending profile and the psychodemographic profile. In addition, this report includes a description of retail and service businesses (“retail businesses”) in the NEC most likely to succeed, industries other than retail (“non-retail businesses”) that would be most likely to succeed, a description of current obstacles to development/ redevelopment, and recommendations on steps that should be taken to improve the competitive position of the NEC and its marketability.

This report includes summaries of the research conducted to meet requirements of the scope of services, along with observations, analysis and recommendations of the consultant.

Definition of the Northeast Corridor Trade Area

The NEC Trade Area is a custom definition to fit the shape of the NEC, which is defined as selected properties along Perrin Beitel Road and Nacogdoches Road from the north side of NE Loop 410 to the north and northeast to the south side of O’Connor Road in north east San Antonio, Texas. The NEC also includes all of the adjacent Naco-Perrin Blvd and short stretches of Thousand Oaks Blvd as well as several side streets that intersect with the NEC.

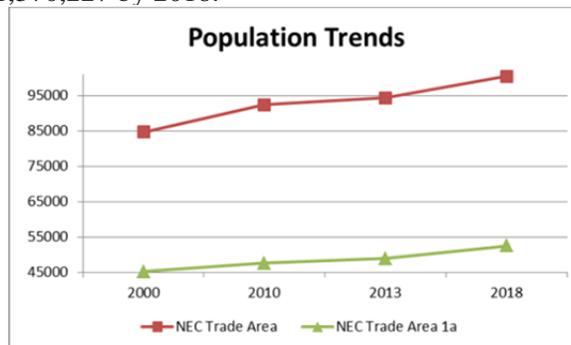
Buffer areas around the NEC were tested in 1-mile, 2-mile and 3-mile distances. Based on locations of competing retail locations, it was determined that the 2-mile buffer (which does not go beyond Loop 1604 on the north) is the best representation of the NEC Trade Area. Instead of scribing the 2-mile buffer shape to collect demographics, a set of eighteen (18) 2010 census tracts was selected as a surrogate to the buffer shape as shown on Map.



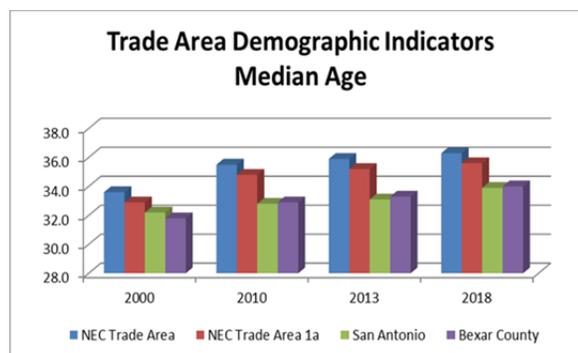
Demographic Profile

Population Trends

- With a 2013 population of 94,392, the Trade Area experienced an average increase of 745 annually since 2000, and is expected to increase by more than 1200 persons annually to 100,480 by 2018.
- The *Northeast Corridor* will benefit from City population growth of more than 20,000 annually over the next 5 years as it reaches 1,370,227 by 2018.



- Trade Area share of population under age 20 has been decreasing and the trend is expected to continue, going from 29% to 27.2% in 2013 and to 26.4% by 2018.
- A similar pattern of fewer young people is occurring in the City. In 2013, 14.2% of Trade Area population is in the 20-29 age group, which is lower than the City's 15.5%.
- Median age in the Trade area is slightly higher than the City and trending *higher*, going from 35.9 years in 2013 compared to the City at 33.1 years.



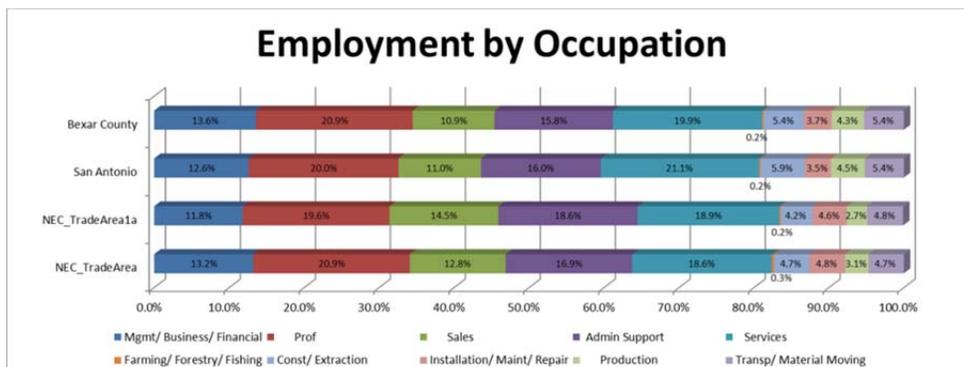
- Trade area 2013 population has a higher share of Blacks and lower share of Hispanic Origin than the City. The share of whites is declining, but shares of Blacks, Other & Hispanic are increasing.
- This trend is expected to continue to 2018 when 48.2% will be of Hispanic Origin.

Educational Attainment

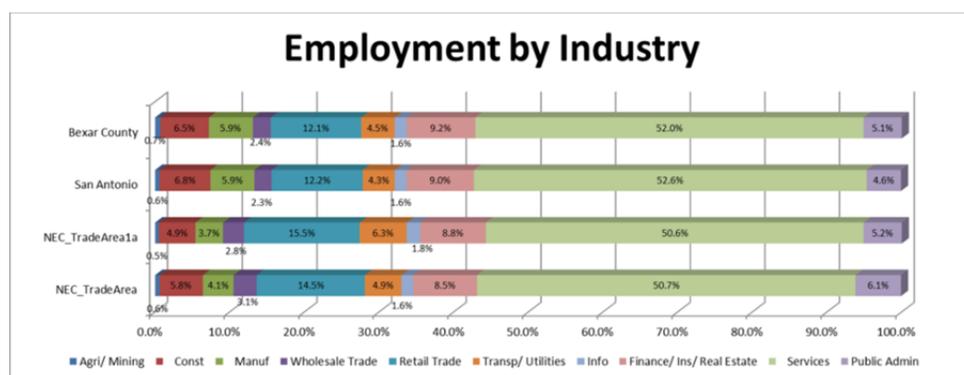
- The Trade Area has a higher percentage of high school graduates (26.5%) and College Graduates (26.0%) than the City at 25.4% and 24.3%.

Employment

- Trade Area population age 16+ and numbering 44,351 in the labor force is almost 2/3 white collar with a higher share of white collar (63.8% to 59.5%), sales (12.8% to 11%) and installation/maintenance/repair workers (4.8% to 3.5%) than the City.



- Trade area population is lower in blue collar share than the City 16 years and older has higher shares of persons employed in Wholesale (3.1% to 2.3%) & Retail Trade (14.5% to 12.2%) than the City.



- Overall, the Trade Area population has more singles, but a **lower share** of population **Never Married** (29.2% to 34.2%) and **higher share of Divorced** population (15.9% to 12.33%) than the City.

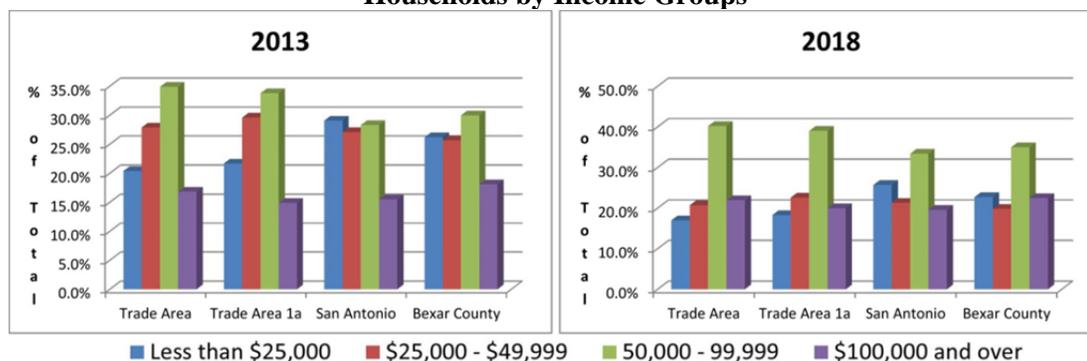
Households

- The Trade Area has increased by 3,925 households from 33,344 in 2000 to the 37,269 households in 2013, with a projection in 2018 to almost 40,000 adding **2,513** Households over the next 5 years.
- Trade area household size continues to be lower at **2.52** persons in 2013 than the City's 2.70. This will continue over the next 5 years, to 2.51 in 2018, a household size found in neighborhoods near downtown.

Income

- Trade Area **Median Household Income** (\$51,289 in 2013) has been consistently **higher** than the City, and is expected see a greater difference by 2018 when it reaches \$63,138 compared to \$52,949 in the City.
- The Trade area has a **lower** percent of households with incomes below \$25,000 in 2013, but **higher** percent than the City with incomes \$25,000-\$99,000.

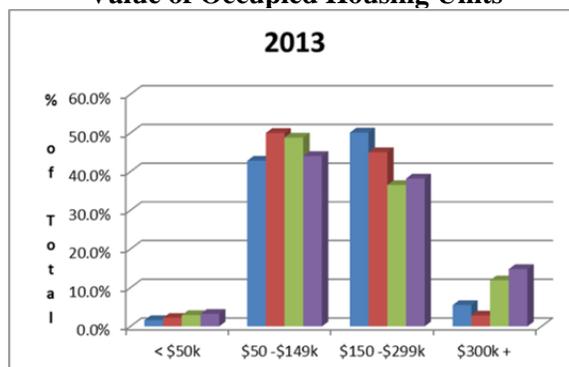
Households by Income Groups



Tenure and Value of Owner-Occupied Units

- Trade Area average housing value of **\$178,948**, reflects the higher percentage of homes in the \$150-\$300,000 value (50.1% to 36.5%) than the City, but lower in over \$300,000 range (5.5%) than the City.
- Average housing value for 2018 is projected to be **\$214,978**, continuing to reflect the higher percentage of homes in the \$150-\$300,000 value (66.1% to 48.2%) than the City.

Value of Occupied Housing Units



- Percent Owner-occupied housing units in the Trade Area is slightly higher than the City in 2013 at **53.4%** to the City's 51.1% owner-occupied and makes a slight gain by 2018.
- With a smaller average household size, the Trade Area has almost 60% 1 & 2 person households, while the City had 55.4% in 2010. Larger households comprise only 10.5%, compared to 14% in the City.
- Only **16%** of households in the Trade Area own their homes free and clear (no mortgage) while **18%** of City households are mortgage-free, though there is a higher rate of owner-occupied in the Trade Area.

Consumer Income Profile

- The NEC Trade Area has a lower share of Households w/disposable income below \$50,000 than the City – 56.8% to 60.4%.
- Median Disposable Income in the Trade Area is \$43,094 and the highest median belongs to the 45-54 age group.
- In 2012, Trade Area consumers spent \$2.275 Billion and the spending patterns are very similar to spending patterns of all City consumers.

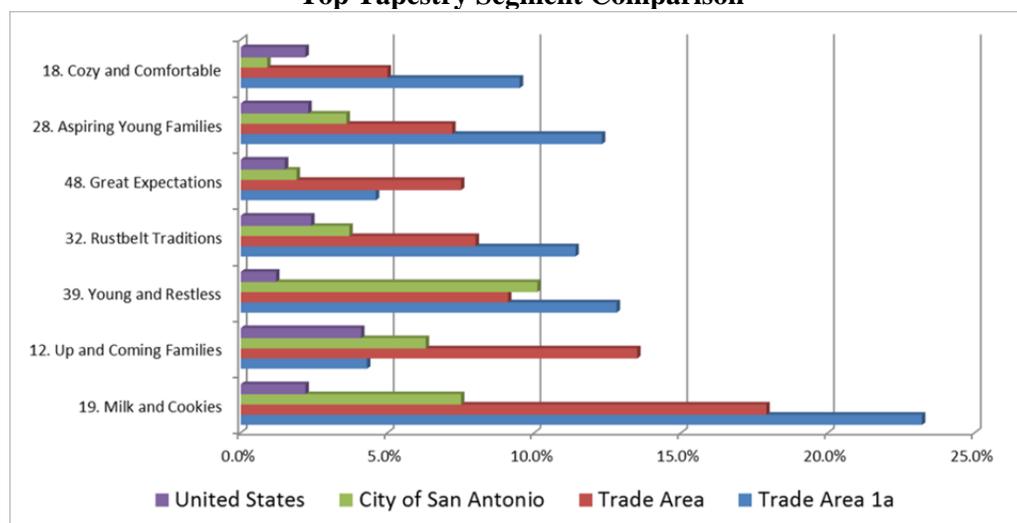
Psycho-Demographic Profile

Tapestry Segmentation is a way to explain differences among consumer groups to better identify target markets and marketing campaigns by including lifestyle and stage in life.

Top Tapestry Segments in the Trade Area

- Milk & Cookies, Up & Coming Families and Young & Restless are the top Segments and could represent the future look of the NEC Trade Area.
- These seven top Tapestry Segments in the Trade Area comprise **68.2%** of Trade Area households.

Top Tapestry Segment Comparison



Using Tapestry Segmentation-Retailers/Businesses

By knowing their customers and profiles, National retailers can seek areas anywhere in the United States that their customer base lives in *clusters*. Segmentation can help to:

- Identify the best locations for new stores;
- Identify differences among population segments;
- Direct their advertising message to selected consumer groups;

A customer profile will help to define their behaviors, identify core customer groups and other groups of opportunity. They use it for:

- Insight into lifestyle characteristics of the best customers;
- Mapping where these customers live;
- Planning and targeting previously un-served;
- Developing strategies to attract customers to stores.

Using Tapestry Segmentation – NEC

The NEC can also use Segmentation in marketing. When determining desired characteristics of future residents, some judgments will be made regarding who and what types of households would become the best neighbors and add to the existing consumer base. The NEC is not only marketing to retailers and other commercial businesses; it is seeking prospective residents/consumers, such as:

- Younger households - single and married, increasing in diversity;
- Families with children;
- Both homeowners and renters;
- A certain level of income;
- Fast growing segment;
- Lifestyles that can be accommodated within the NEC;

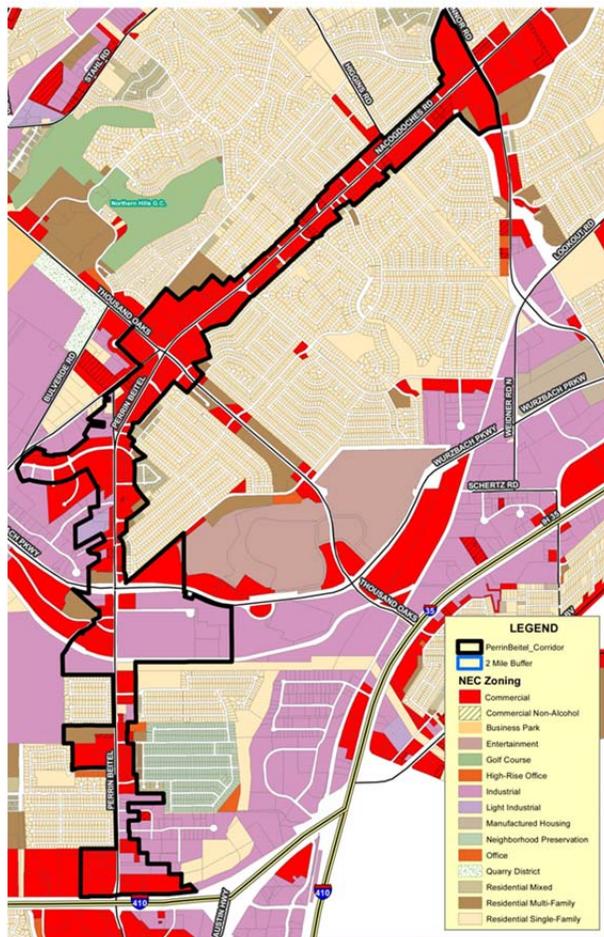
Characteristics of the Trade Area

The 2-mile buffer is the best representation of the NEC Trade Area and included in the buffer is a set of eighteen (18) 2010 census tracts selected to collect demographics as shown on Map 3.

Zoning in the Trade Area and the Corridor

Trade Area

- As should be expected in a Trade Area, zoning for residential covers more than 55% of the land, including Single Family, Mixed, Multi-Family and Manufactured housing.
- Surprisingly, Commercial and Industrial zoning are almost balanced at 18.3% for Commercial & Entertainment; and 16.9% for Industrial, which includes Light Industrial and Business Park **zoning**.



Zoning in the Corridor

| Zoning Description | Acres | Pct of Total |
|----------------------------------|---------------|---------------|
| Commercial | 355.93 | 65.3% |
| Commercial - Non-Alcohol | 16.88 | 3.1% |
| Commercial - Restrictive Alcohol | 10.04 | 1.8% |
| Entertainment | 1.37 | 0.3% |
| High-Rise Office | 1.32 | 0.2% |
| Industrial | 129.95 | 23.8% |
| Light Industrial | 8.88 | 1.6% |
| Residential Multi-Family | 16.94 | 3.1% |
| Residential Single-Family | 3.80 | 0.7% |
| Grand Total NEC Corridor | 545.11 | 100.0% |

The NEC is truly a commercial corridor in terms of zoning, where 70.5% of the land area is zoned for Commercial uses.

Industrial and Light Industrial zoning cover 25.4% of land in the NEC, and multi-family residential zoning is 3.1% of the land.

| Zoning Description | Zoning Acres | Land Use Acres | Percent Difference |
|---------------------------|--------------|----------------|--------------------|
| Commercial | 385.54 | 385.46 | 0.02% |
| Industrial | 138.83 | 1.88 | 98.60% |
| Residential Multi-Family | 16.94 | 22.62 | -51.20% |
| Residential Single-Family | 3.8 | 0.00 | 100.00% |

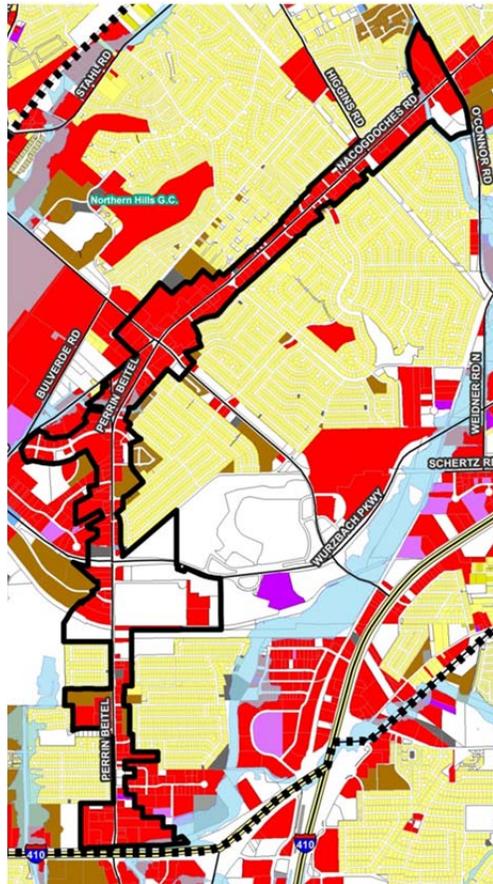
Based on the comparison of zoning and land use within the NEC, it appears the NEC is significantly over-zoned with Industrial zoning, as shown on the following comparison of zoning with land use.

Land Uses in the Trade Area and the Corridor

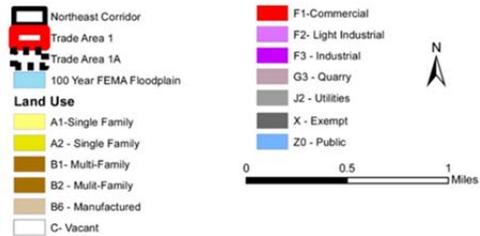
Trade Area

- Bexar Appraisal District tax records and geography show there are 15,168.9 acres in the Trade Area, approximately 23.7 square miles.
- Total appraised property value in the Trade Area was \$5,694,241,941 based on 2012 records, with a total 70.7% of value in residential uses.
- Vacant land covers 24.6% of total land, with residential uses covering 43.8% of total.

Land Uses in the Corridor



Land Uses in the Corridor



Within the North East Corridor, there are 556.82 acres, 0.87 of a square mile.

Total appraised property value in the Corridor was \$206,533,593 based on 2012 records, which was 89.4% of total appraised value of land and improvements.

Vacant Land in the Trade Area and the Corridor

Trade Area

- Vacant land in the Trade Area has an appraised value of \$122,899,995. It represents 3,205.24 acres and 1,222 parcels in the Trade Area.



Vacant Land in the Corridor

| Land Type | Total Value | Acres | Nbr of Parcels |
|----------------------|--------------------|---------------|----------------|
| Vacant Lots | \$4,143,030 | 79.42 | 37 |
| Vac Est Land w/hmstd | \$669,530 | 64.80 | 4 |
| Total | \$4,812,560 | 144.22 | 41 |

- Actual Vacant Land is 139.45 acres, which is 25% of the 556.82 acres of total land in the Corridor.
- U.S. Post Office vacant land of 4.771 acres indicated by the Bexar Appraisal District is not included in the 139.45 acres above.
- The appraised value of vacant land in the Corridor is \$4,812,560 and includes 40 parcels.



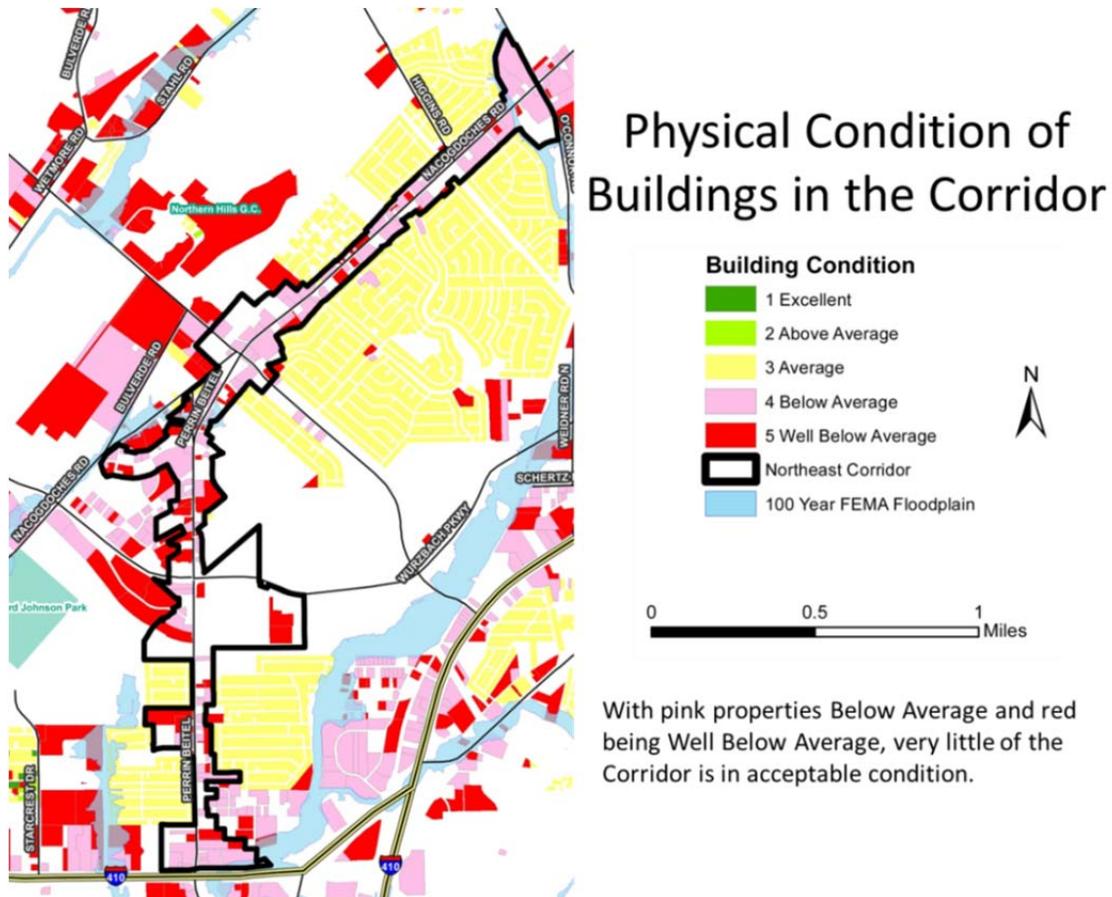
Trends in Kindergarten Enrollment

North East ISD kindergarten enrollment has increased by **15%** over the ten years, but kindergarten enrollment in the Trade Area has decreased by **59%** and the smaller Trade Area 1a decreased by **6%**.

Traffic Counts in the Corridor

- While traffic counts have declined between 10% and 20% over the past several years, the NEC can hold its own against other corridors in the City with counts ranging from 35,000 to 37,000 on the lower part of Perrin Beitel to over 28,000 ADT along Nacogdoches between Thousand Oaks and O'Connor.

Physical Condition of Buildings in the Corridor



Physical Condition of Buildings in the Trade Area

- Observations by most survey respondents are confirmed in the table and map on Physical Condition according to the Bexar Appraisal District file on Improvement Details for 2012.
- A very high **99.7% of single family homes are Average condition or above**, while the opposite is true for Commercial buildings in the Trade Area with **98.3% Below Average** condition. Of the total number of buildings, 971 are below average condition.
- *Commercial buildings in the Corridor are terribly run-down.* It also shows that most residential structures are in “average” condition with less than 16% of residential structures in the Trade Area in above average condition or better.

Retail Market Profile and Gap Analysis

A positive gap represents a LEAKAGE gap of sales to other locations outside the subject area and sales is less than demand by households within the trade area. For merchants in industry groups that have leakage, it indicates that households in the trade area are shopping elsewhere and presents an opportunity for those merchants to increase sales. In the case of the NEC, it means opportunity for additional stores in the industry groups showing a LEAKAGE gap.

Retail Market Place Profile

- The Trade Area retail market in 2012 experienced more than \$970 million in retail trade, food & drink sales through 804 establishments.
- Consumer households in the Trade Area spent more than \$955 million during the same year, leaving a retail *Surplus* Gap of (\$14,604,768).

Industry Groups with Significant **SURPLUS** Gap

- Industry Groups in the Trade Area show a Significant *Surplus* Gap of sales totaled more than \$193 million in 257 establishments with households demand at only \$72 million, leaving a gap of \$120,931,479.

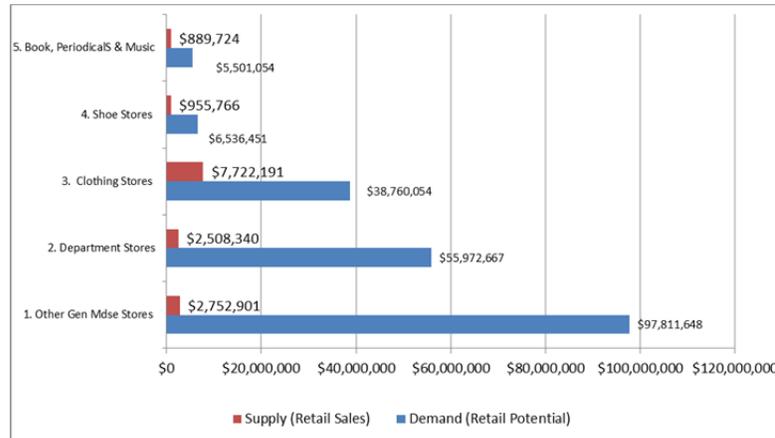
Industry Groups with Significant **LEAKAGE** Gap

- *LEAKAGE* is experienced when there is more in *SPENDING* in an area than sales by establishments in that area. Thus, “leakage” of dollars is going outside the Trade Area.
- Almost half of the Retail Leakage Gap of \$95,058,747 occurred in “Other General Merchandise Stores” Group. However, a new Wal-Mart in the Trade Area will capture at least \$50 million of those sales.

| Industry Summary | Industry Group | Demand (Retail Potential) | Supply (Retail Sales) | Leakage Retail Gap | Leakage Factor | Nbr of Estabs |
|---------------------------|----------------|---------------------------|-----------------------|--------------------|----------------|---------------|
| Other Gen Mdse Stores | 4529 | \$97,811,648 | \$2,752,901 | \$95,058,747 | 94.5 | 6 |
| Department Stores | 4521 | \$55,972,667 | \$2,508,340 | \$53,464,327 | 91.4 | 3 |
| Ltd-Service Eating Places | 7222 | \$49,395,513 | \$39,931,762 | \$9,463,752 | 10.6 | 36 |
| Clothing Stores | 4481 | \$38,760,054 | \$7,722,191 | \$31,037,863 | 66.8 | 35 |
| Jewelry/Luggage/Leather | 4483 | \$7,893,038 | \$5,186,997 | \$2,706,041 | 20.7 | 27 |
| Shoe Stores | 4482 | \$6,536,451 | \$955,766 | \$5,580,685 | 74.5 | 4 |
| Book, Periodicals & Music | 4512 | \$5,501,054 | \$889,724 | \$4,611,330 | 72.2 | 14 |
| Lawn & Garden | 4442 | \$3,042,879 | \$1,284,050 | \$1,758,829 | 40.6 | 3 |
| Total Leakage | | \$264,913,304 | \$61,231,731 | \$203,681,573 | | 128 |

- Industry Groups in the Trade Area showing a Significant *LEAKAGE* Gap of sales totaled almost \$204 million through 128 establishments with households spending (demand) more than \$265 million, leaving a total *LEAKAGE* Gap of (\$203,681,473).
- One objective of the Consultant is to determine which Industry Groups in the Trade Area show Significant *LEAKAGE* Gap of sales, therefore indicating which types of retail stores are most likely to establish themselves within the Trade Area, specifically the NEC.
- First Tier, or Top 5, Industry groups most likely to attract new retail stores are shown on the graph below, with the *highest* leakage group – Other General Merchandise Stores at the bottom of the graph with supply in RED and demand in BLUE and a positive is LEAKAGE.

First Tier Industry Groups with Leakage



San Antonio’s Market for Retail Space

What is the market for retail space in San Antonio and the NEC? In the SA market for Retail space, *Net absorption is trending upward*, while vacancy rates, asking rents, and construction are neither up nor down.

The city’s vacancy rate for retail space is 10.6% overall as of June 2013, but here was positive net absorption of 118,705 sq. ft. for 1st & 2nd Quarters, an average of 20,000 sq. ft. per month and the Northeast Sector had a vacancy rate of 12.5%.

The current market of positive absorption and the significant leakage of retail sales in the Trade Area point to demand that should be met in the Corridor.

Recommended Retailers for Recruitment

Based on analysis of Industry Groups with Leakage, Consultant recommends the follow store-types that should be recruited to place a store in the NEC:

1. **Other General Merchandise Stores.** (Dollar General, 99 Cents Only, Dollar Tree, Ross, TJ Maxx)
2. **Department Stores** (Belk, Stein Mart)
3. **Apparel Stores** (Men: Casual Male, Men’s Warehouse; Women: Bebe, Deb, Dress Barn, Mothers Work, Talbots; Children: Children’s Place, Gymboree; All: Burlington Coat Factory)
4. **Shoe Stores.** (Rack Room, DSW, Famous Footwear, Naturalizer)
5. **Book, Periodical & Music Stores.** (Books-A-Million, Lifeway Christian Resources, CD Warehouse)

1. Other General Merchandise Stores

The below shows the amount of Other General Merchandise Stores **Leakage** in the Trade Area, with only 6 establishments while 95 stores in the City of San Antonio as a whole are experiencing a **Surplus** of sales.

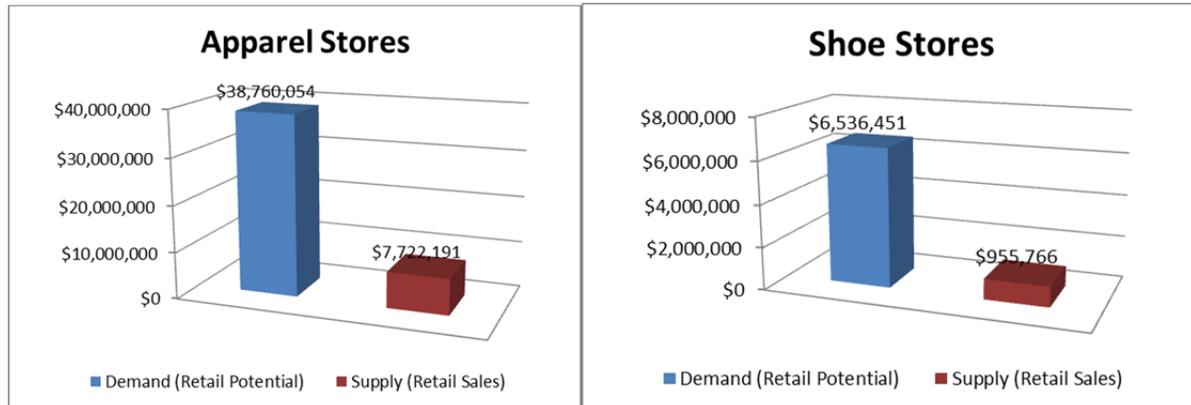


2. Department Stores

The graph below shows the amount of Department Stores **Leakage** in the Trade Area, with only 3 establishments while 107 stores in the City of San Antonio as a whole are experiencing a **Surplus** of sales.

3. Apparel Stores

The graph below shows the amount of Apparel Stores Leakage in the Trade Area, with only 35 establishments while 768 Apparel stores in the City of San Antonio as a whole are experiencing a Surplus of sales.



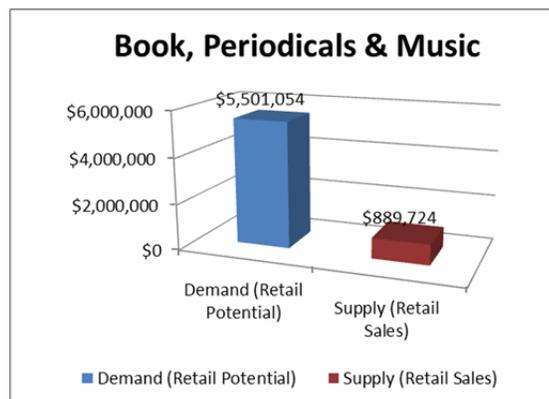
4. Shoe Stores

The graph below shows the amount of Shoe Stores Leakage in the Trade Area, with only 4 establishments while 137 stores in the City as a whole are experiencing a Surplus of sales.

5. Book, Periodical & Music Stores

The graph below shows the amount of Book, Periodical & Music Stores Leakage in the Trade Area, with only 14 establishments while 180 stores in the City as a whole are also experiencing a 10.7% Leakage of sales.

Trade Area Leakage of \$4.6 million is 83% of sales, not all of which is likely to be online. This should leave room for \$2.0 to \$4.0 million in sales for book, periodical and music stores in the Corridor.



Projected Retail Profile: 2018

A Retail Profile was projected for 2018 using ESRI projections of population, households and median disposable income and Consultant's estimates of recommended stores, store sq. ft. and store sales/sf. ft.

- Population and household growth are modest, but with the addition of recommended retail stores, the Supply (Retail Sales) would be \$1.2 bn, an increase of 23% over five years.
- There would still be a retail Leakage gap of \$61.3 million, but the Trade Area economy would be robust.

Non-Retail Businesses

The NEC is an interesting mix of retail and non-retail businesses and land uses. Though dominated by retail establishments with 338 of 395 designated parcels and spaces, there are 181 Non-Retail businesses and 10 residential uses out of 210 designated parcels and spaces.

- As of October 2013, there is an estimated total of 1,631,087 square feet of **RETAIL space** in the NEC, of which 210,272 square feet are vacant. There is a **Vacancy rate of 12.9%** for **RETAIL space**.
- In addition, there is an estimated total of 1,311,735 square feet of **Non-Retail space** in the North East Corridor, of which 114,590 square feet are vacant. Non-Retail space has a low vacancy rate of 8.7%.
- The overall vacancy rate for all space (buildings) within the Corridor is 13.5%.

Inventory Summary of Land and Building Space for Separate Nacogdoches and Perrin Beitel Segments

| Parcel Use | Nbr | Land Area | Available Space | Building Area | Occ Rate | Vac Rate |
|---|------------|---------------|-----------------|------------------|--------------|--------------|
| <u>Nacogdoches Retail Segment</u> | | | | | | |
| Retail Total | 298 | 163.55 | 186,669 | 1,259,165 | 85.2% | 14.8% |
| Residential Total | 4 | 8.28 | n/a | n/a | n/a | n/a |
| Non-Retail Total | 130 | 93.55 | 96,084 | 771,986 | 87.6% | 12.4% |
| Any Use | 24 | 22.60 | 4,978 | 4,978 | 0.0% | 100.0% |
| Retail Corridor Total | 456 | 287.98 | 287,731 | 2,036,129 | 85.9% | 14.1% |
| <u>Perrin Beitel Mixed Use Segment</u> | | | | | | |
| Retail Total | 97 | 44.42 | 23,603 | 371,922 | 93.7% | 6.3% |
| Residential Total | 6 | 27.83 | n/a | n/a | n/a | n/a |
| Non-Retail Total | 70 | 119.22 | 18,506 | 539,749 | 96.6% | 3.4% |
| Any Use | 26 | 84.25 | 78,791 | 78,791 | 0.0% | 100.0% |
| Mixed Use Corridor Total | 199 | 275.72 | 120,900 | 990,462 | 87.8% | 12.2% |
| <u>NORTHEAST CORRIDOR</u> | | | | | | |
| Retail Total | 395 | 207.97 | 210,272 | 1,631,087 | 87.1% | 12.9% |
| Residential Total | 10 | 36.11 | n/a | n/a | n/a | n/a |
| Non-Retail Total | 200 | 212.77 | 114,590 | 1,311,735 | 91.3% | 8.7% |
| Any Use | 50 | 106.85 | 83,769 | 83,769 | 0.0% | 100.0% |
| Northeast Corridor Total | 655 | 563.70 | 408,631 | 3,026,591 | 86.5% | 13.5% |

Note: Available space and building area totals do not include residential floor space, land area is included.

- One segment, with a **Retail Focus** (called the Nacogdoches Retail Segment) is recommended for those parcels that lie to the north of Wye Dr. and include the portion of Perrin Beitel north of there, Old Perrin Beitel, Naco Perrin, Thousand Oaks, Nacogdoches and O'Connor Rd and all addresses on side streets along Nacogdoches.
- The other segment should Focus on **Mixed Uses** (called Perrin Beitel Mixed Use Segment) and is recommended on Perrin Beitel from NE Loop 410 to Wye Dr. and includes all address on side streets along Perrin Beitel.
- The **Nacogdoches Retail Segment** includes 456 establishments, covers 287.9 acres, and has 287,731 sq. ft. of vacant available floor space and total building area of 2,036,129 square feet. With only 51% of the land in the NEC, the Nacogdoches Retail Segment has 88.8% of available retail space and 77.2% of total building area.

Non-Retail Markets in San Antonio

- Industrial
 - Call Center Industry
- Community College, Tech or Trade School
- Medical Office
- Office
- Apartments

San Antonio's Real Estate Markets

The North East Corridor is not suitable for Distribution Warehouse space, and tends to be a better market for Service Center/Flex space although the current market demand and near future do not favor the NEC.

- *The NEC is a location where most medical office space is Class C. Generally, the current market for Medical Office space and near future do not favor the Corridor for demand of this type of space.*
- *The current market for Office Space and that of the near future are not favorable for the NEC with demand for this type of space.*
- *Current positive trends in the apartment market are favorable to the NEC with demand for more housing all over.*

Recommended Non-Retail Users

Consultant is charged with recommending up to three Non-Retail Users for possible recruitment to locate in the Corridor. The recommendations are Apartments for Millennials (under 35 years), a Call Center and a campus/center for a community college or Trade School.

Apartment Opportunities

The Corridor and its Trade Area are expected to experience growth up to 2,500 households over the next 5 years. There is vacant and under-used land within the NEC and too much retail space.

Call Center Opportunity

In addition to the property at 13526 Nacogdoches, there is a possible site for a small call center at 8531 Perrin Beitel. This building is approximately 47,000 sq. ft. could accommodate a small call center of between 200 and 250 employees or agents.

Community College, Technical or Trade School Opportunity

There are also two potential locations for a community college, technical or trade school in the Corridor. Both buildings are mentioned above with regard to a call center. The location at 13526 Nacogdoches with 67,546 sq. ft. could provide space for 450 to 750 students. The former Lack's furniture store with 47,000 sq. ft. could space for 350 to 500 students. This building has never been used for anything but furniture retail and would need to be remodeled and properly equipped.

Steps to Improve Competitive Position of the Corridor IMPLEMENTATION

Obstacles to Development/Redevelopment

- Owner asking price and for lease only key properties
- Attitude of status quo
- Lack of cooperation among business owners, landlords, land owners and neighborhood associations;
- Perrin Oaks Plaza – the fenced, “sinking brown building.”
- Level of commitment by the City to redevelopment
- Unwillingness of owners/landlords to tolerate “dark space;”
- Time and cost in obtaining approvals to code;
- NIMBY reactions (VIA Transit Station and multifamily);
- Political uncertainty (city can influence the developers’ perception by being friendly toward proposals);
- Consumer confidence in Corridor businesses;
- Lack of appropriate space/location for selected retailers;

Conditions that Hamper Redevelopment

- Lack of trust or loyalty between business owners and neighbors;
- Lack of consistent, passionate leadership within the business community;
- Lack of design standards, appearance of corridor;
- Lack of maintenance (buildings, public areas, vacant lots);
- Crime (arson, graffiti, theft, robbery);
- No incentive for owners/landlords to plan for the long-term – rent to marginal tenants now to avoid maintaining “dark” space for better tenants later;
- Projected increases in long-term interest rates and anticipated reluctance of lenders to finance projects.

PRO-ACTIVE Revitalization Tools

Take advantage of Pro-Active revitalization tools such as Public Improvement Districts (PID) and Tax Increment Reinvestment Zones (TIRZ).

Public Improvement Districts (PID):

- PIDs offer an alternative means for financing public improvement projects needed for economic growth.
- Can provide means to fund supplemental services and improvements to meet community needs which could not otherwise be constructed or provided and be paid by those who benefit the most from them;
- Financed through assessment (say 0.08 to 0.17 per \$100 valuation) against all property owners in District;

Tax Increment Reinvestment Zone (TIRZ)

- Create a TIRZ when sufficient improvements in the Zone are *known*, including subdivisions with approved plans or commercial area with new construction activity;
- TIRZ can be empowered to borrow against future revenue, but funds **cannot** be used for maintenance;
- TIRZ funds **CAN** be used in ways not allowed by other types of Districts, such as façade preservation, acquisition of property, demolition of private improvements, etc.;
- TIRZ can be empowered to condemn and acquire private property;
- *Projected revenue for the TIRZ with only the Sky Mine included as tax base is \$570,000 annually.*

Neighborhood Empowerment Zone (NEZ):

- Neighborhood Empowerment Zones are allowed by the State of Texas for potential economic development, to promote housing, affordable housing, increase economic development, increase quality of social services, education, public safety or rehab affordable housing within a designated zone.
- A NEZ can refund building fees, refund and abate sales taxes, abate property taxes and achieve environmental goals in order to benefit the zone.

Recommendations

Steps to Improve the NEC Competitive Position

General Recommendations

- Adopt a **pro-active attitude** and provide the tools for successful revitalization;
- Encourage strong **pro-active leadership** in the Corridor Business Community to focus on redevelopment;
- Create an **entity with condemnation powers** and funding that can/will redevelop the Corridor;
- Provide an **entity with borrowing powers** to take advantage of guaranteed revenue from known projects;
- Prepare **design guidelines** for façade preservation, signage and landscaping to allow rather than to impose on owners of marginal properties in both the **Retail** and the **Mixed Use** Segments of the Corridor;
- Convince property owners and businesses to follow adopted guidelines them in order to improve overall business and consider establishing a **RETAIL** Segment north of Wye Drive and a **MIXED USE** Segment south of Wye Drive for administrative, maintenance and marketing purposes;
- Monitor, define and **measure success** for both Segments of the Corridor.
- Provide **design assistance** to all property owners in the Corridor to make sketches that illustrate what their facades will look like when applying the design guidelines;
- Create a **village theme** around the intersection of Thousand Oaks & Nacogdoches in the Retail Segment, make it **walkable** for at least the village, if not entire retail corridor;

Retailers and Retail

- Begin recruiting the retailers from the following **RETAIL** Industry Groups as discussed above that represent significant LEAKAGE of retail sales from the Corridor: 1) Other General Merchandise Stores, including Discount Stores; 2) Department Stores; 3) Apparel Stores; 4) Shoe Stores; and 5) Book Stores.

Non-Retail to Pursue and To Do

- 1) Begin recruiting developers for apartments for selected sites or other suitable locations; 2) recruit call centers; and 3) entice Alamo Colleges to place a community college campus within the Corridor, recruit technical schools and trade schools by promoting existing vacant buildings and space.
- Create a PID to address the needs of a mixed-use non-retail Corridor Segment;

Residential in the Corridor

- Assist and facilitate the addition of 1,000 multi-family units over the next five years to supplement the existing market.

Residential in Trade Area neighborhoods

- Establish a Neighborhood Empowerment Zone to promote and revitalize housing, affordable housing, economic development and quality services within the designated area.

Revitalization

- Create a TIRZ and add the following properties to the Corridor TIRZ: 1) Sky Mine on old Bulverde Rd; 2) vacant land between Bulverde Rd and Old Nacogdoches Rd; and 3) Bell Dr very poor residential area
- Develop and implement a plan throughout the Corridor for state-of-the-art exterior lighting;

Marketing

- Incorporate effective marketing that will give property owners, business owners and investors the confidence the proposed redevelopment will happen;
- Establish a Public Improvement District for each Segment of the Corridor to focus attention on marketing, events, maintenance of public areas, watering of trees and vegetation. (this would complement the TIRZ);
- Maintain an inventory of active listings of for sale or lease when overall vacancy rate of both retail and non-retail space is 10% or greater; provide map of locations; lease rates and asking prices where available.

NORTHEAST CORRIDOR REVITALIZATION INITIATIVE MARKET STUDY

Introduction

In May of 2013, the City of San Antonio Department of Planning & Community Development issued a Request for Proposals to complete a market study for the Northeast Corridor (NEC) Revitalization Initiative. The Department included NEC background information and a detailed scope of services.

The Background Information included the statement: “. . . the NEC Revitalization Initiative will work to restore vitality to the Perrin Beitel and Nacogdoches corridors. Today, these corridors are suffering from declining property values, a glut of vacant and underutilized properties, resident dissatisfaction with retail offerings, poor aesthetics, and an unsustainable mix of uses. This initiative will include a place-based program of service delivery enhancements and targeted investments that will result in an incremental reversal of these current conditions. Revitalizing the Northeast Corridor will require tactical partnerships, strategic planning, and swift implementation.” The position of the Northeast Corridor within the City of San Antonio and Bexar County is illustrated on Map 1.

In July, Wendell Davis & Associates was selected to conduct the market study for the Northeast Corridor (NEC) Revitalization Initiative. Elements of the scope of services include Trade Area definition and Trade Area summaries of the demographic profile, consumer income and spending profile and the psychodemographic profile. In addition, this report includes a description of retail and service businesses (“retail businesses”) in the NEC most likely to succeed, industries other than retail (“non-retail businesses”) that would be most likely to succeed, a description of current obstacles to development/ redevelopment, and recommendations on steps that should be taken to improve the competitive position of the NEC and its marketability.

This report includes summaries of the research conducted to meet requirements of the scope of services, along with observations, analysis and recommendations of the consultant.

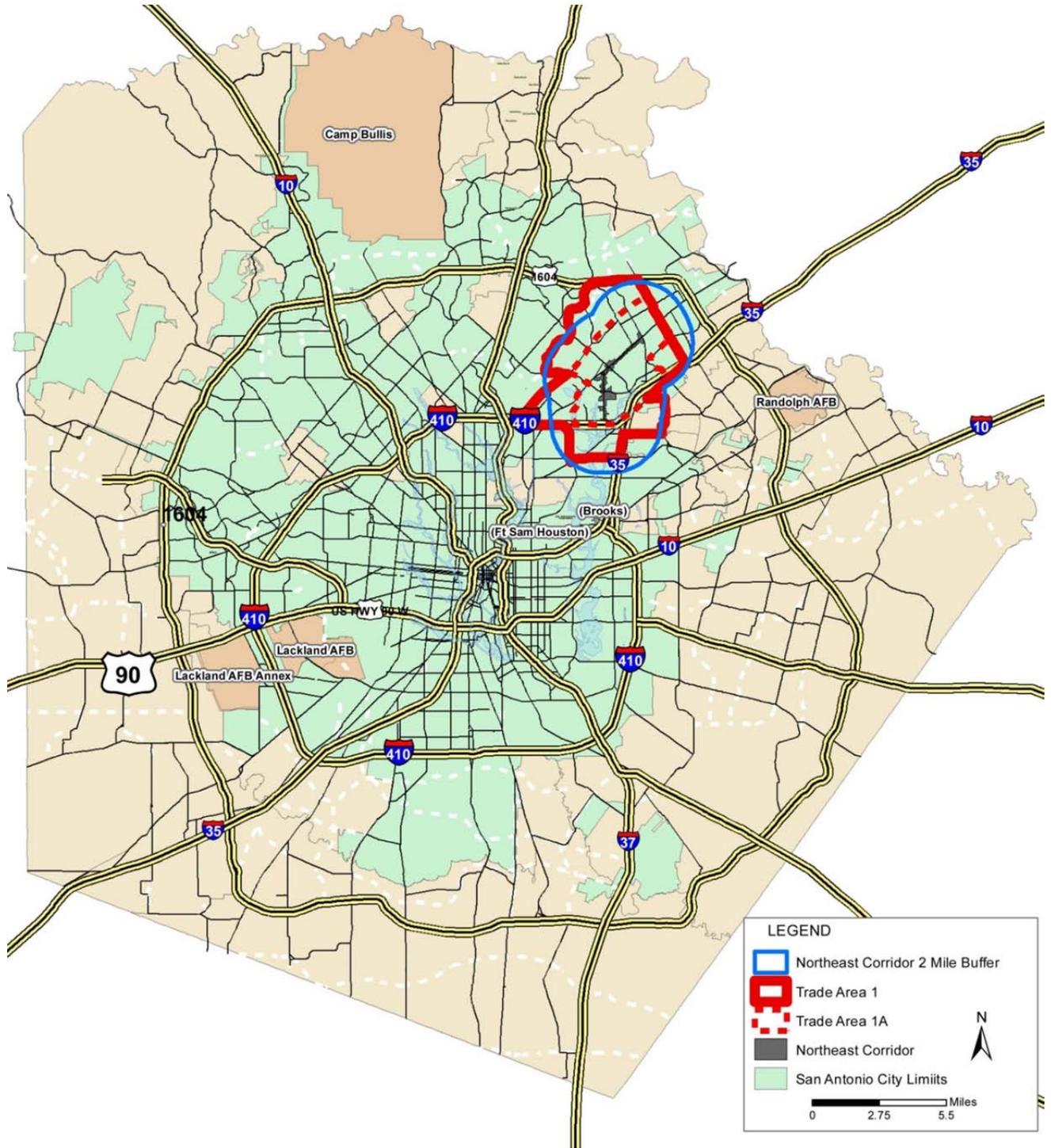
Definition of the Northeast Corridor Trade Area

Most market studies are conducted around an existing or potential site and the trade area is often defined as a 3 to 5 mile radius. The Northeast Corridor Trade Area became a custom definition to fit the shape of the corridor, which is defined as selected properties along Perrin Beitel Road and Nacogdoches Road from the north side of NE Loop 410 north and northeastward to the south side of O’Connor Road in north east San Antonio, Texas. The NEC also includes all of the adjacent Naco-Perrin Blvd and short stretches of Thousand Oaks Blvd as well as several side streets that intersect with the Corridor.

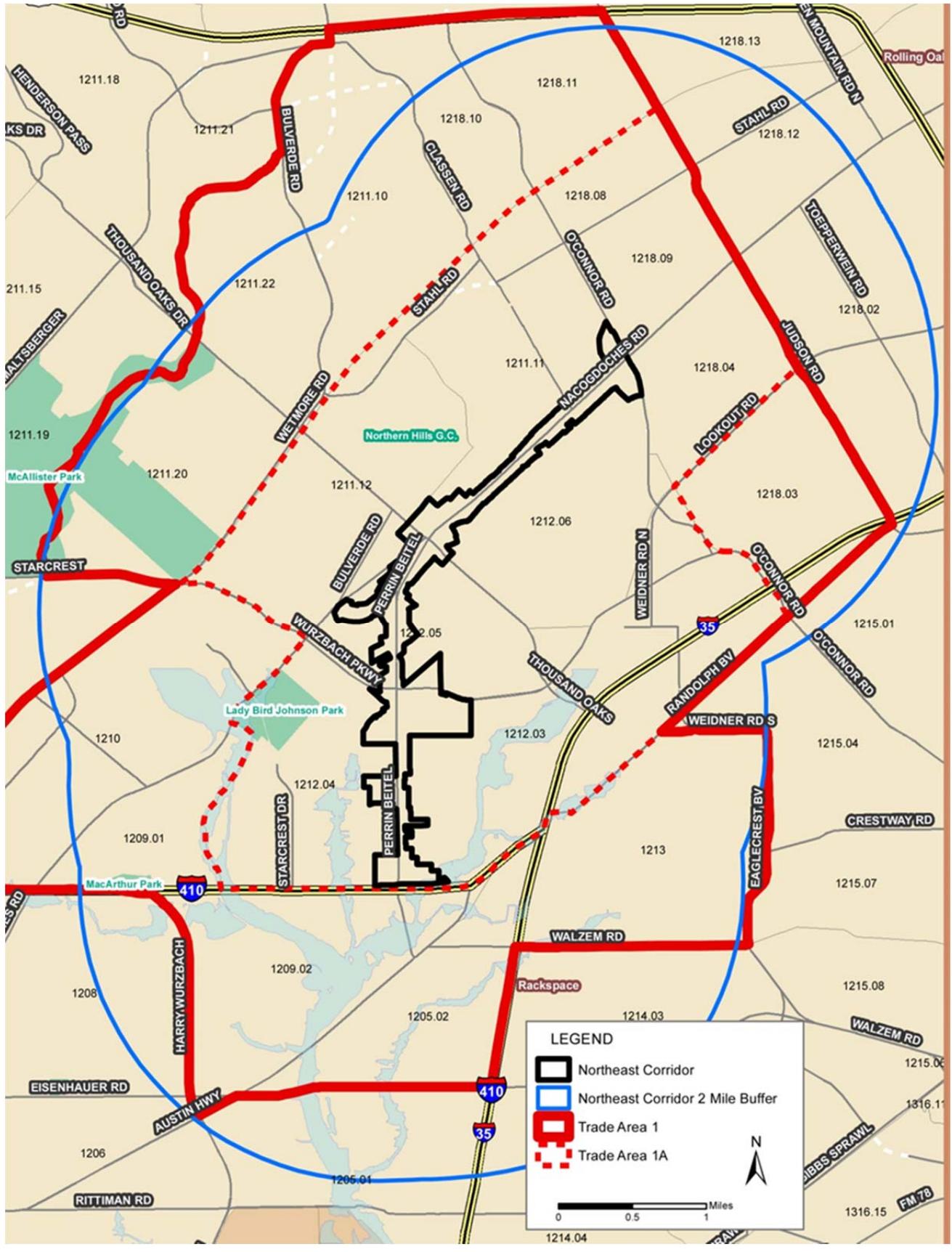
Buffer areas around the Corridor were tested in 1-mile, 2-mile and 3-mile distances. Based on locations of competing retail locations and it was determined that the 3-mile radius included much more of the surrounding neighborhoods than was likely to frequent the subject corridor. The 1-mile buffer was much too small to represent a trade area for more than 1,500,000 square feet of retail space. Therefore, the 2-mile buffer, which does not go beyond Loop 1604 on the north, is the best representation of the NEC Trade Area. Instead of scribing the 2-mile buffer shape to collect demographics, a set of eighteen (18) 2010 census tracts was selected as a surrogate to the buffer shape as shown on Map 2.

The additional detail potential of census tract data proved to be useful in later defining a smaller trade area consisting of only those 9 census tracts that abut Perrin Beitel and Nacogdoches. This smaller inner trade area is designated as Trade Area 1a and offers additional insight to the households that makeup the Trade Area.

Map 1: San Antonio and the Trade Area



Map 2: Northeast Corridor Trade Area



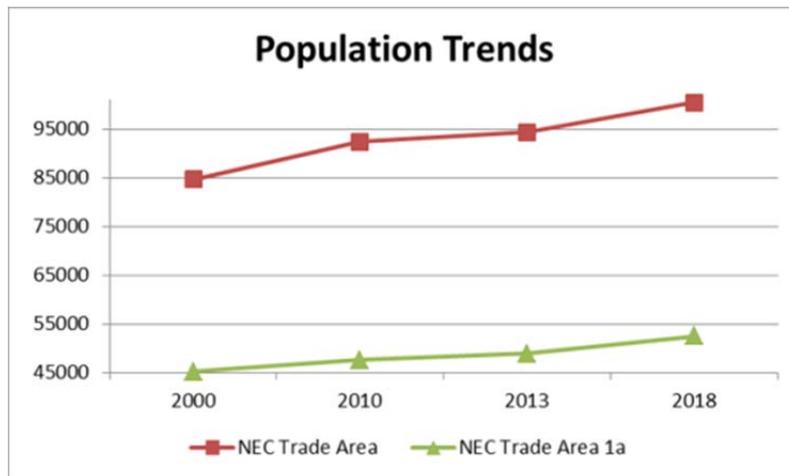
Demographic Profile

Population Trends

With a 2013 population of 94,392, the Trade Area has experienced an increase of 9,689 since 2000, an average of 745 persons annually. The NEC Trade Area population is increasing at a lower rate than either the City or the County, with a slow increase of 0.9% annually from 2000 to 2010 compared to the City at 1.5% and the County at 1.7%.

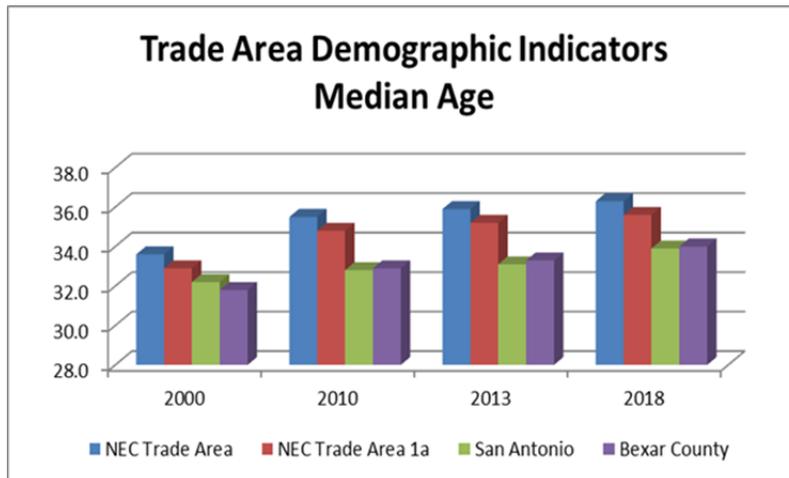
While ESRI projections have always appeared to be trend-line conservative, the projection for 2018 of 100,480 is an addition of more than 1200 persons annually. The increase is more striking in Trade Area 1a where an average of 714 will be added compared to 287 persons annually from 2000 to 2013. The graph shows healthy growth in the Trade Area, primarily due to growth in Trade Area 1a.

While the Trade Area population was growing modestly, the City population increased from 1,150,947 in 2000 to 1,370,227 in 2010 an average of 16,868 annually. One of the areas that will benefit from the City's expected growth of more than 20,000 annually over the next 5 years will be the Northeast Corridor.



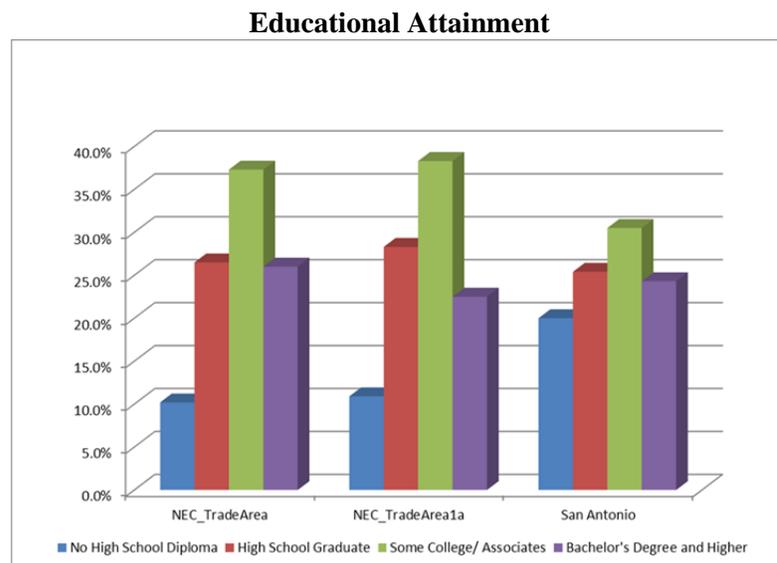
The share of population under age 20 in the Trade Area has decreased continuously since 2000 and is expected to be even lower in 2018, going from 29% to 27.2% in 2013 and to 26.4% by 2018. A similar pattern of fewer young people is occurring in the City. In 2013, 14.2% of Trade Area population is in the 20-29 age group, which is lower than the City's 15.5%. Slight changes downward in this age group are expected in the Trade Area as well as the City and County. Population from 30-39 is comparable to San Antonio and Bexar County. Trade Area has lower percentage of population under age 30 in 2013 and a higher percentage of population over age 55.

Median age in the Trade area is slightly higher than the City and trending *higher*. The gap in Median Age between Trade Area population and the City is widening where the Trade Area median age was 33.6 years in 2000 and 35.9 years in 2013 and the City was 32.2 years in 2000 and 33.1 in 2013. Trade Area 1a is slightly younger in median age than the Trade Area, but still higher than the City or County. However the 2018 age gap between the Trade Area and the City will be narrower than in 2013.



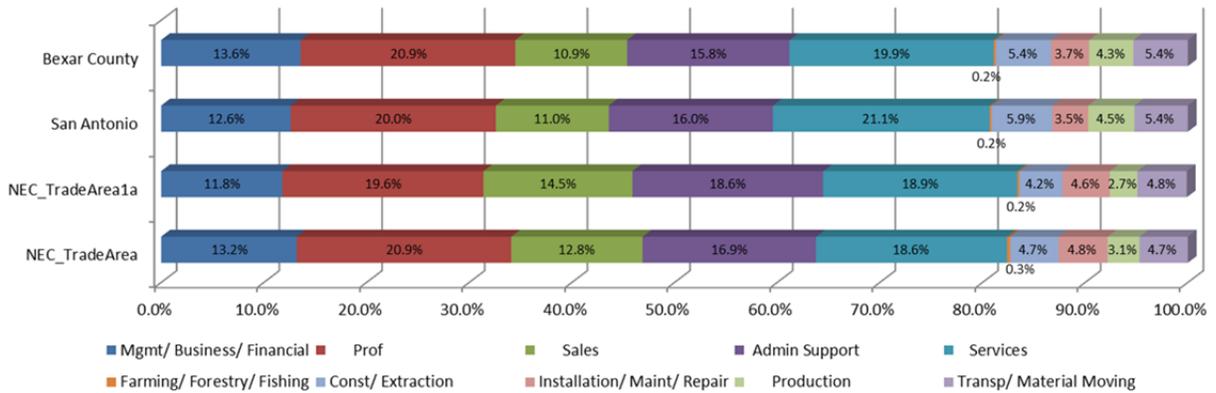
Trade area 2013 population has a higher share of Blacks and lower share of Hispanic Origin than the City, and the share of whites is declining. However, the share of Blacks, Other and Hispanic are increasing. In 2000, 75% of Trade Area population was White and 31.5% was Hispanic Origin. By 2013 72% are white and 45.6% are Hispanic Origin. This trend is expected to continue to 2018 when 71.6% will be White and 48.2% will be Hispanic. Since 2010, the percentage of Blacks has declined from 9.9% to 9.8% in 2013 and 9.7% is expected for 2018. Population of Other race/ethnicity has increased very slowly from 16.3% in 2000 to 18.2% in 2013, with a small increase to 18.7% in 2018. The blue and red columns in the graphs below represent the Trade Area (blue) and Trade Area 1a (red).

The Trade Area has a higher percentage of high school graduates (26.5%) and College Graduates (26.0%) than the City at 25.4% and 24.3%. Not totally expected is that Trade Area 1a has a higher percentage of high school graduates than the Trade Area as a whole (28.3%), but as expected a lower percentage of college graduates (22.5%). This rate of college graduation is also lower than either the City or the County



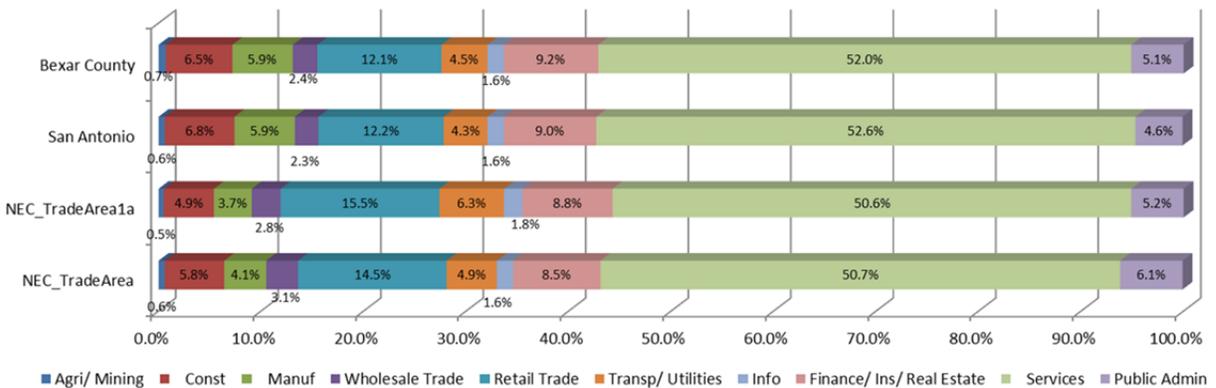
Trade Area population 16+ and numbering 44,351 in the labor force is almost 2/3 white collar and Trade Area 1a is almost a point higher. Both have higher shares of white collar (63.8% to 59.5%), sales (12.8% to 11%) and installation/maintenance/repair workers (4.8% to 3.5%) than the City.

Employment by Occupation



Trade area population 16 years and older has higher shares of persons employed in Wholesale (3.1% to 2.3%) & Retail Trade (14.5% to 12.2%) and Transportation/Utilities (4.9% to 4.3%) than the City. The Trade Area is obviously lower in blue collar share than the City or County.

Employment by Industry



Overall, the Trade Area population has more singles, but a **lower share** of population **Never Married** (29.2% to 34.2%) and **higher share of Divorced** population (15.9% to 12.33%) than the City. The County with 50.5% Married is higher than the other areas of interest, while the Trade Area has 49.5% of the population age 15+ that are married.

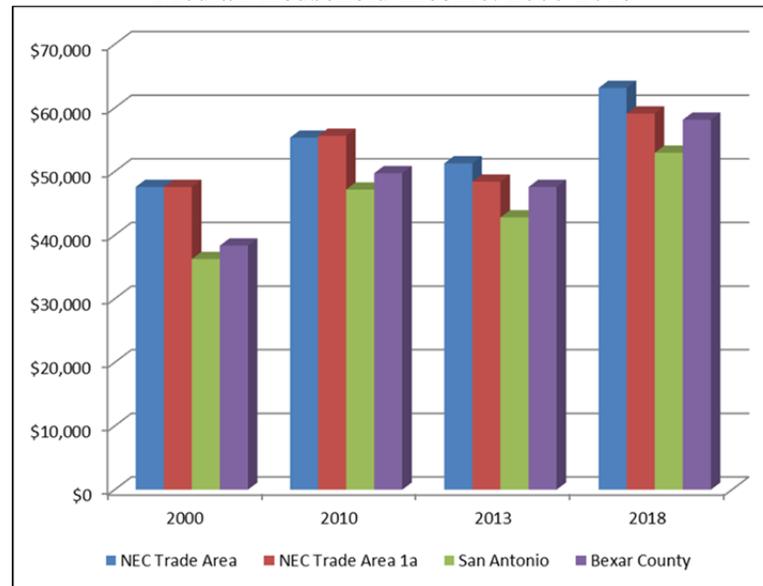
| | 2013 Pop 15+ by Marital Status | Never Married | Married | Widowed | Divorced |
|-----------------|--------------------------------|---------------|---------|---------|----------|
| NEC_TradeArea | 74,998 | 29.2% | 49.5% | 5.4% | 15.9% |
| NEC_TradeArea1a | 38,875 | 30.4% | 47.2% | 5.5% | 16.9% |
| San Antonio | 1,072,091 | 34.2% | 48.0% | 5.6% | 12.3% |
| Bexar County | 1,398,215 | 32.6% | 50.5% | 5.2% | 11.7% |

Trade Area households have increased by 3,925 households from 33,344 in 2000 to the 37,269 households in 2013, with a projection in 2018 to almost 40,000. Household growth rate is slower than the City's, but **2,513** Households are expected to be added over the next 5 years.

Trade area household size continues to be lower at **2.52** persons in 2013 than the City's 2.70. The trend will continue to be lower over the next 5 years, reaching 2.51 in 2018. Trade Area 1a will have even smaller household size in 2018 at 2.48. This is a household size often found in neighborhoods near downtown.

Trade Area **Median Household Income** (\$51,289 in 2013) has been consistently **higher** than the City, and is expected see a greater difference by 2018 when Trade Area median household income reaches \$63,138 compared to \$52,949 in the City. Median Household Income in his area has been consistently higher than City and County incomes since at least 2000. Follow the blue column in the graph below to compare the Trade Area to the City and County.

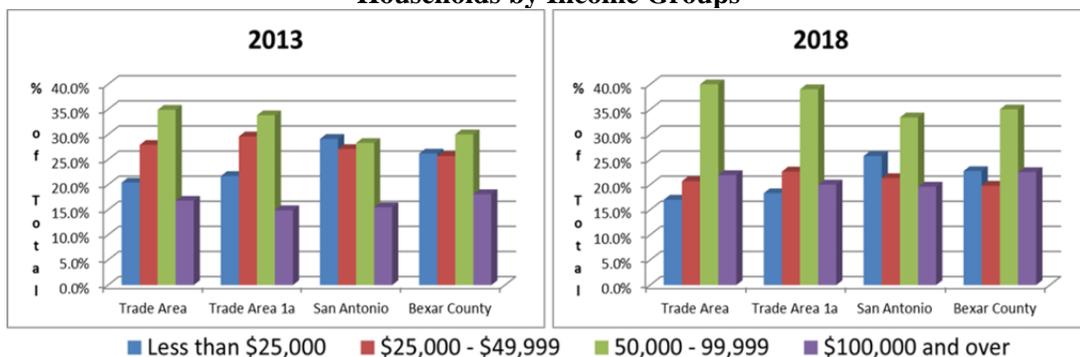
Median Household Income: 2000-2018



Trade Area **Per Capita Income** (\$25,905 in 2013) has been **higher** than the City since 2000, and is expected to see more of a difference by 2018 when Trade Area per capita income is expected to reach \$30,188, which will be 14.5% higher than the City's \$26,360.

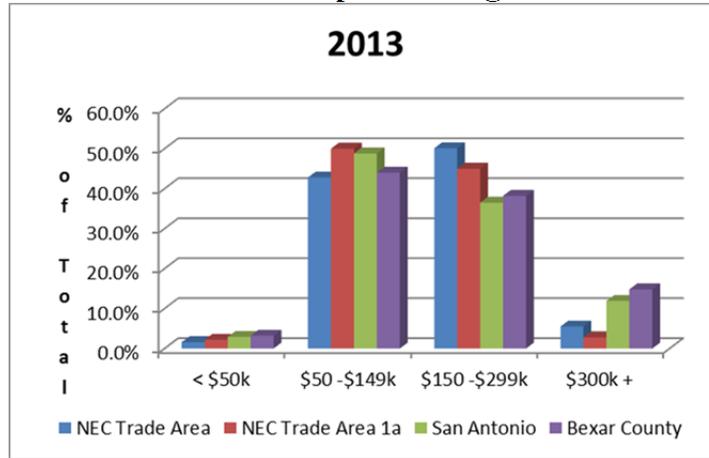
In 2000 and 2010, the Trade area had a **lower** percent of households with incomes below \$25,000 (23.1% to 33.6%), but **higher** percent (33.8% to 25.9%) than the City with incomes \$25,000-\$99,000. The same pattern is apparent in 2013 and 2018, as the Trade area has a **lower** percent of households with incomes below \$25,000, but **higher** percent than the City with incomes \$25,000-\$99,000. The column colors on the graph below relate to income groups rather than trade areas. Income groups are together for each trade area.

Households by Income Groups



Trade Area average housing value is **\$178,948**, reflecting the higher percentage of homes in the \$150-\$300,000 value (50.1% to 36.5%) than the City, but lower in over \$300,000 range (5.5%) than both the City and County (11.9% and 14.8%). Average housing value for 2018 is projected to be **\$214,978**, continuing to reflect the higher percentage of homes in the \$150-\$300,000 value (66.1% to 48.2%) than the City, but lower over \$300,000 (8.9%) than City and County (16% and 19.1%).

Value of Occupied Housing Units

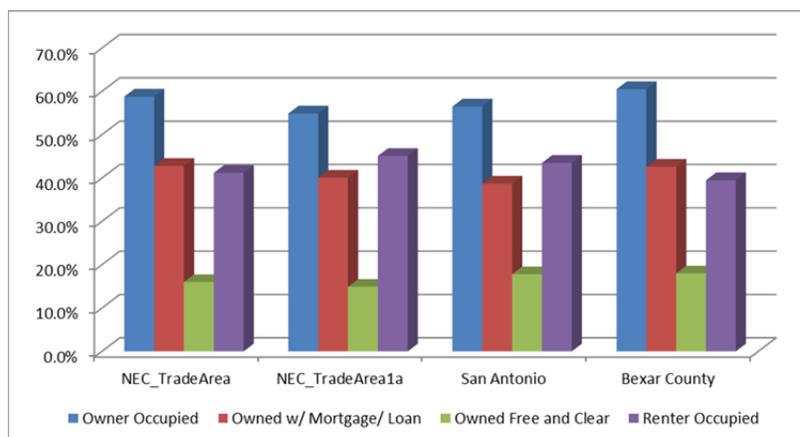


Trade Area average housing value was higher than the City in 2000 at \$96,452 but fell behind the City by 2013 at \$178,948 to \$183,506. However, the gap is expected to be smaller by 2018. Overall, Percent Owner-occupied housing units in the Trade Area is slightly higher than the City in 2013 at **53.4%** to the City's 51.1% owner-occupied and makes a slight gain by 2018.

With a smaller average household size, the Trade Area has almost 60% 1 & 2 person households, while the City and County had 55.4% or less in 2010. Large households for 5 persons or more comprise only 10.5%, compared to 14% in the City.

Only **16%** of household in the Trade Area own their homes free and clear (no mortgage) while almost **18%** of City and County households are mortgage-free, even though there is a higher rate of owner-occupied in the Trade Area.

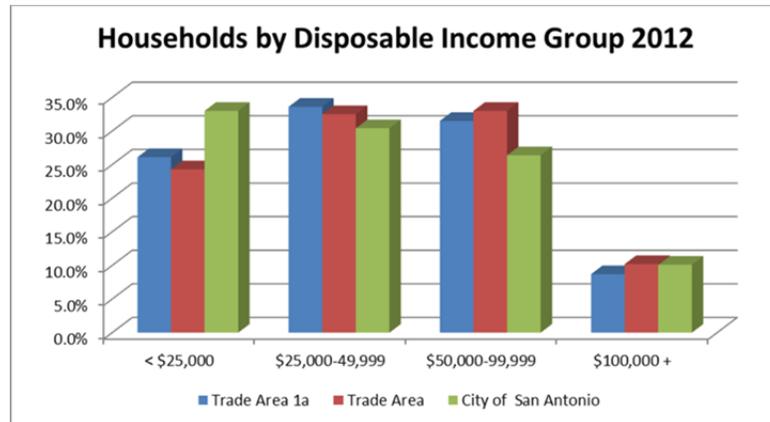
Households by Tenure and Mortgage Status



Consumer Income Profile

The Northeast Corridor Trade Area has a lower percentage of Households w/ disposable income below \$50,000 than the City – 56.8% to 63.4%. And, the City has lower percent in the \$50,000 to \$99,999 disposable income group than the Trade Area – 26.4% in the City compared to 33% in the Trade Area. This is shown by comparing the blue columns of the Trade Area above, to the green columns of the City.

Median Disposable Income in the Trade Area is \$43,094 compared to \$37,125 in the City. The highest median belongs to the 45-54 age group in the Trade Area. In 2012, Trade Area consumers spent \$2.275 Billion and the spending patterns are very similar to spending patterns of all City consumers.



Households by Disposable Income Group 2012

| 2012 Disposable Income | Trade Area 1a | Trade Area | City of San Antonio |
|------------------------|---------------|------------|---------------------|
| < \$25,000 | 26.1% | 24.3% | 33.0% |
| \$25,000-49,999 | 33.6% | 32.5% | 30.4% |
| \$50,000-99,999 | 31.5% | 33.0% | 26.4% |
| \$100,000 + | 8.7% | 10.2% | 10.1% |
| Total | 100.0% | 100.0% | 100.0% |

The Trade Area and the City both have more than 10% of households with greater than \$100,000 disposable income.

Overall, the NEC Trade Area has a higher proportion of households in the middle disposable incomes between \$50,000 and \$100,000; lower proportion of households in with disposable incomes below \$50,000 and about the same proportion as the City with disposable incomes of \$100,000 and above.

Psycho Demographic Profile

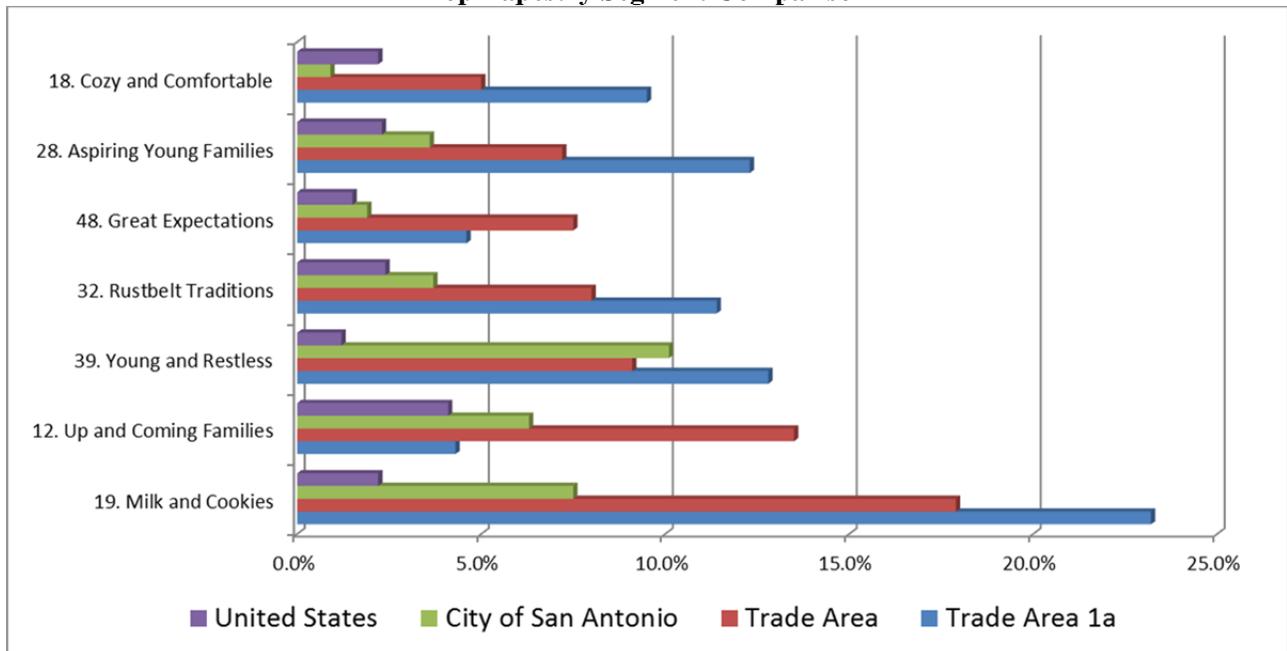
Tapestry Segmentation is a way to explain differences among consumer groups to better identify target markets and marketing campaigns by including lifestyle and stage in life and calls upon a broad range of information about households.

Milk & Cookies, Up & Coming Families and Young & Restless are the top Segments and could represent the future look of the Northeast Corridor Trade Area.

These seven top Tapestry Segments in the Trade Area comprise 68.2% of the households, and 69.2% of households in the smaller Trade Area 1a.

Five of the seven top Tapestry Segments in the Trade Area comprise 23% of the City of San Antonio households, but only 13.2% of U.S. households.

Top Tapestry Segment Comparison



LifeMode Groups are grouped in terms of life experiences, such as similar ages and traits, such as affluence. These groups can be targeted for marketing by retailers or home builders for communication.

Urbanization Groups are based on geographic areas of origin or growing up, from very rural farm communities to highly urban lifestyles and all levels of urbanization and degrees of density, which influence their decision-making patterns.

Tables at the end of the report compare several characteristics of the Trade Area top Segments, relating to race/ethnicity, tenure, age of homes currently they are living in, and brief descriptions of the segments – generational, families, affluence, kids and diversity.

The *fastest growing* Segment with a presence in the Trade Area (13.5%) is: “Up and Coming Families,” with a growth rate of 4.56% annually. This segment is also the most affluent.

Using Tapestry Segmentation-Retailers/Businesses

National retailers often make database-driven decisions. By knowing their customers and profiles, they can seek areas anywhere in the United States where their customer base lives in *clusters*. Segmentation can help to:

- Identify the best locations for new stores;
- Evaluate existing stores;
- Identify differences among population segments;
- Select lines of merchandise;
- Direct advertising messages to selected consumer groups;

A customer profile will help to define their behaviors, identify core customer groups and other groups of opportunity. They use it for:

- Insight into lifestyle characteristics of the best customers;
- Map where these customers live by using a national data provider;
- Planning and targeting previously un-served or under-served neighborhoods;
- Exploring new opportunities for products, services & customers; and
- Developing strategies to attract customers to stores/businesses and to purchase their products and services.

Top Tapestry Segment Descriptions

Characteristics of “Milk and Cookies”

(17.9% of Trade Area, 23.2% of TA1a)

These households are mostly young affluent married couples starting families, of which ½ have children and ¼ are ages 45-54.

- Median Age: 34.1 years
- Growth rate: Stable
- College degree: 20%
- Housing type: > 70% Single Family
- Median Household income: \$57,170
- Tenure: high
- Age of homes: < 30 years
- Diversity: same as U.S.

Characteristics of “Up and Coming Families”

(15.5% of Trade Area, 4.3% of TA1a)

These households are young affluent families with young kids, a mix of Gen-Xers and Baby Boomers.

- Median Age: 32.6 years
- Growth rate: **High (4.56% annually)**
- College degree: 20%
- Housing type: > 80% Single Family
- Median Household income: \$69,522
- Tenure: High (80% homeownership)
- Age of homes: < 10 years
- Diversity: Mostly white, but increasing in diversity.

Characteristics of “Young and Restless”

(9.1% of Trade Area, 12.8% of TA1a)

These households are the young on-the-go population, career-oriented; 58% single or shared and 23% of households have kids.

- Median Age: 28.9 years
- Growth rate: Moderate
- College degree: 36%
- Housing type: 85% Multi-Family
- Median Household income: \$39,765
- Tenure: Low (mostly renters)
- Age of homes: < 30 years
- Diversity: 56% white, high diversity

Characteristics of “Rustbelt Traditions”

(8.0% of Trade Area, 11.4% of TA1a)

These households are a mix of married couple families, single parents and singles alone.

- Median Age: 35.9 years
- Growth rate: Slow
- College degree: 15%
- Housing type: > 70% Single Family
- Median Household income: \$42,337
- Tenure: High (70% homeownership)
- Age of homes: < 54 years
- Diversity: Mostly white, low diversity

Characteristics of “Great Expectations”

(7.5% of Trade Area, 4.6% of TA1a)

These households are singles living alone and married couple families beginning careers or family life.

- Median Age: 33.1 years
- Growth rate: Moderate
- College degree: 18%
- Housing type: 50% Single Family
- Median Household income: \$35,406
- Tenure: Low (mostly renters)
- Age of homes: < 54 years
- Diversity: Very diverse, same as U.S.

Characteristics of “Aspiring Young Families”

(7.2% of Trade Area, 12.3% of TA1a)

These households are young start-up families, married couple with or without kids where 2/3 of households are families, 37% are single person, and 9% are shared households.

- Median Age: 31.1 years
- Growth rate: Slow (1.13% annually)
- College degree: not available
- Housing type: 50% Single Family
- Median Household income: \$46,275
- Tenure: Low (47% homeowners)
- Age of homes: not available
- Diversity: Mix of households, same as U.S.

Characteristics of “Cozy and Comfortable”

(6.0% of Trade Area, 9.5% of TA 1a)

These households are middle-age married couples with or without kids, single family homes in older neighborhoods.

- Median Age: 41.7 years
- Growth rate: Slow (0.48% annually)
- College degree: not available
- Housing type: 88% Single Family
- Median Household income: \$59,287
- Tenure: High (84% homeowners)
- Age of homes: < 44 years
- Diversity: Mostly white.

Using Tapestry Segmentation – NEC

The Northeast Corridor can also use Segmentation in marketing. When determining desired characteristics of future residents, some judgments will be made regarding who and what types of households would become the best neighbors and add to the existing consumer base. The NEC is not only marketing to retailers and other commercial businesses; it is seeking prospective residents/consumers, such as:

- Younger households - single and married, increasing in diversity;
- Families with children;
- Both homeowners and renters;
- A certain level of income;
- Fast growing segment;
- Lifestyles that can be accommodated within the Corridor;
- Something more in the middle of the LifeMode and Urbanization Groups;

As the Northeast Corridor is marketed to businesses, there is a need for additional consumers. In a way, consumers of housing need to be sought out or recruited. The following Tapestry Segments might be considered as future residents and consumers in the Corridor. These have been selected based on a combination of a possible “fit” with the proposed housing, growth potential and median income.

Characteristics of “Boomburbs”

(0.0 % of Trade Area, 3.8% of City of San Antonio)

These households are middle-age married couples with or without kids, single family homes in older neighborhoods.

- Median Age: 36.1 years
- Growth rate: 4.51% annually
- College degree: 50%
- Housing type: 85%+ Single Family
- Median Household income: \$104,395
- Tenure: High (87% homeowners)
- Age of homes: < 25 years
- Diversity: Mostly white.

Characteristics of “Prosperous Empty Nesters”

(4.1% of Trade Area, 3.8% of City of San Antonio)

These households are middle-age married couples with or without kids, single family homes in older neighborhoods.

- Median Age: 47.6 years
- Growth rate: 0.53% annually
- College degree: 39% (of 25 years & older)
- Housing type: 75%+ Single Family
- Median Household income: \$63,682
- Tenure: High
- Age of homes: > 33 years
- Diversity: 90% white.

Characteristics of “Crossroads”

(1.4% of Trade Area, 1.4% of City of San Antonio)

These households are middle-age married couples with or without kids, single family homes in older neighborhoods.

- Median Age: 33.6 years
- Growth rate: 1.4% annually
- College degree: 39% of 25 years & older *have attended*
- Housing type: 36% Single Family, 50%+ in mobile homes
- Median Household income: \$37,185
- Tenure: High (69%)
- Age of homes: < 44 years
- Diversity: < 80% white.

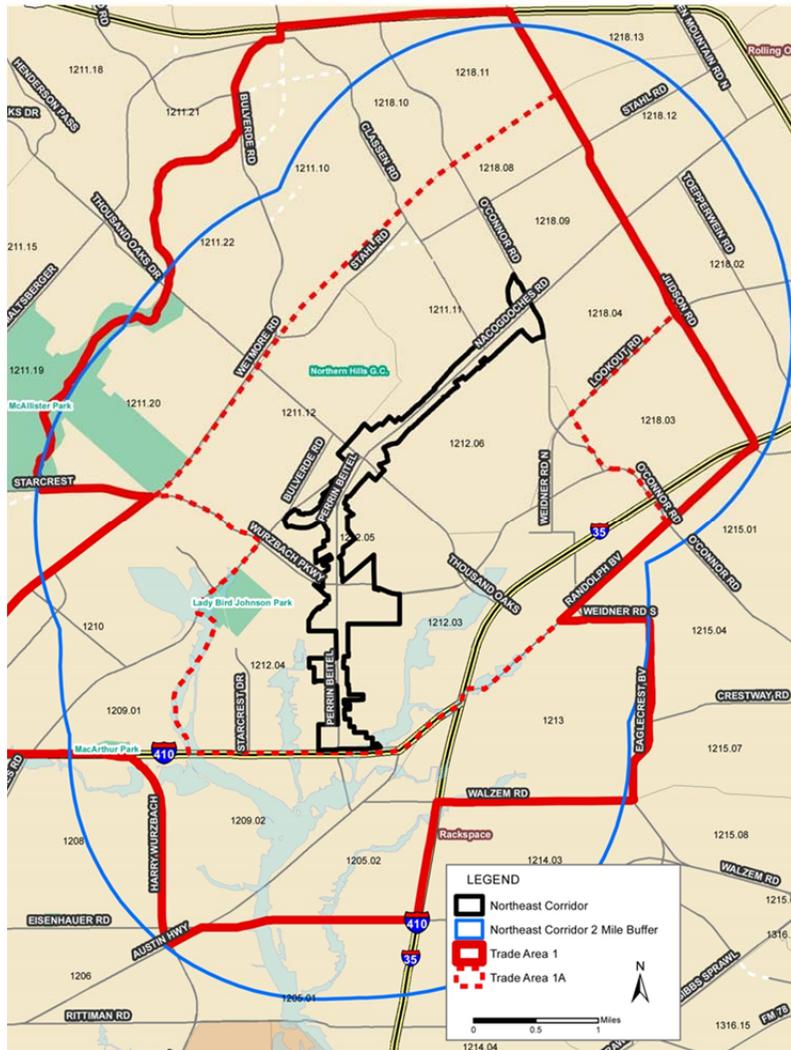
Characteristics of the Trade Area

Description. Rather than being defined as a 3 to 5 mile radius from the intersection of Thousand Oaks and Nacogdoches, the Northeast Corridor (NEC) Trade Area is custom definition to fit the shape of the corridor. It is defined as selected properties along Perrin Beitel Road and Nacogdoches Road from the north side of NE Loop 410 north and northeastward to the south side of O'Connor Road in north east San Antonio, Texas. The NEC also includes all of the adjacent Naco-Perrin Blvd and short stretches of Thousand Oaks Blvd as well as several side streets that intersect with the Corridor.

The 2-mile buffer (blue line), which does not go beyond Loop 1604 on the north, is the best representation of the NEC Trade Area. Instead of scribing the 2-mile buffer shape to collect demographics, a set of eighteen (18) 2010 census tracts (heavy red line) was selected as a surrogate to the buffer shape as shown on Map 3.

The additional detail potential of census tract data proved to be useful in later defining a smaller trade area consisting of only those 9 census tracts (dashed red line) that abut Perrin Beitel and Nacogdoches. This smaller inner trade area is designated as Trade Area 1a and offers additional insight to the households that makeup the Trade Area.

Map 3. Northeast Corridor Trade Area



Northeast Corridor Trade Area

Northeast Corridor Trade Area (heavy red line) consists of 18 Census Tracts that represent a 2-mile buffer (blue line) around the NEC Corridor in gray.

Trade Area 1a (dashed red line) consists of the 9 census tracts that abut the Corridor.

Building Permit Activity in the Trade Area

Considerably more Building Permits have been issued for existing structures over the past 5 ½ years than for new structures, which represent approximately one-third, or 267 versus 519 for existing structures. Since 2008, there have been 786 permits issued in the Trade Area. Permits for 2013 are through June. The best year for existing building permits was 2009, with 115 while 2011 was best for new structures with 68.

| B_Permits | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | Totals |
|--------------------------------|-----------|------------|------------|------------|------------|-----------|------------|
| FOR EXISTING STRUCTURES | | | | | | | |
| Residential | 15 | 46 | 35 | 36 | 39 | 13 | 184 |
| Retail | 30 | 24 | 26 | 18 | 16 | 15 | 129 |
| Non-Retail | 20 | 45 | 51 | 36 | 36 | 18 | 206 |
| Subtotals | 65 | 115 | 112 | 90 | 91 | 46 | 519 |
| FOR NEW STRUCTURES | | | | | | | |
| Residential | 13 | 17 | 27 | 24 | 11 | 7 | 99 |
| Retail | 3 | 8 | 9 | 19 | 8 | 0 | 47 |
| Non-Retail | 18 | 27 | 27 | 25 | 15 | 9 | 121 |
| Subtotals | 34 | 52 | 63 | 68 | 34 | 16 | 267 |
| Trade Area | 99 | 167 | 175 | 158 | 125 | 62 | 786 |

With only 99 permits for **new homes** since 2008, the Trade Area would be considered a *slow growth* area.

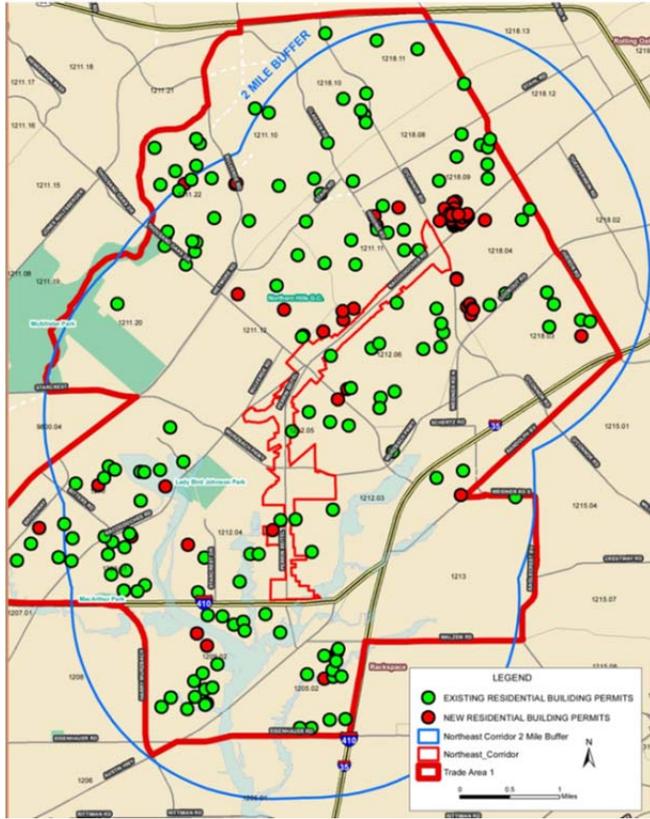
In the retail sector, new service structures have led the way with 34 of 47 retail building permits and only 10 retail building permits were issued.

The Trade area has experienced fairly significant additions and alterations to Existing Structures. There have been almost twice as many **Residential** permits for Existing Structures as for new housing units with 184 permits since 2008.

Permits for existing **Retail** structures have averaged only 23 per year, representing almost 25% of permits for additions and alterations to Existing Structures in the Trade Area over the last 5 ½ years.

Existing **Non-Retail** structures permits accounted for 206 permits, or 40% of Existing Structure permits. After a very low year in 2008, there were two much better years to make up for that and leveling off at an average of 36 permits annually for Non-Retail additions & alterations.

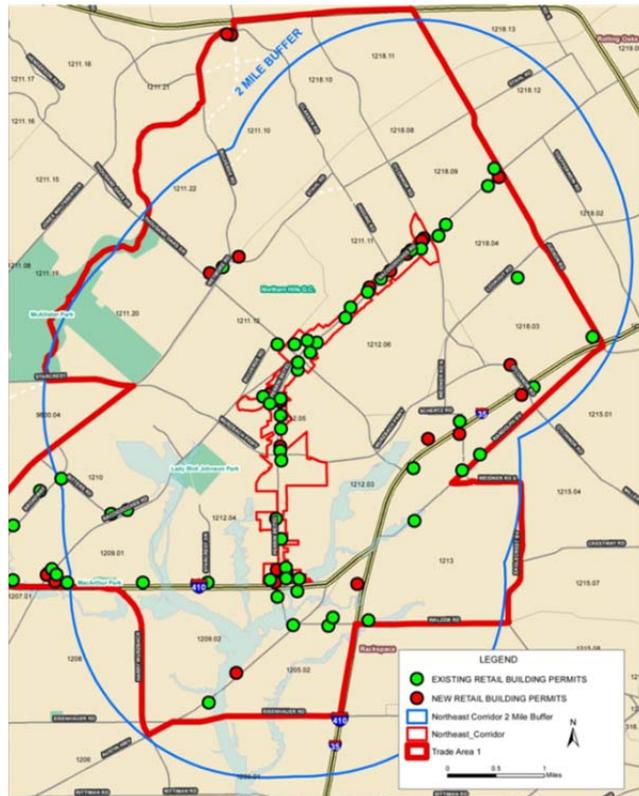
Map 4. Residential Building Permits



Residential Building Permits

| Year | New | Existing |
|--------------|-----------|------------|
| 2008 | 13 | 15 |
| 2009 | 17 | 46 |
| 2010 | 27 | 35 |
| 2011 | 24 | 36 |
| 2012 | 11 | 39 |
| 2013 | 7 | 13 |
| Total | 99 | 184 |

Map 5. Retail Building Permits

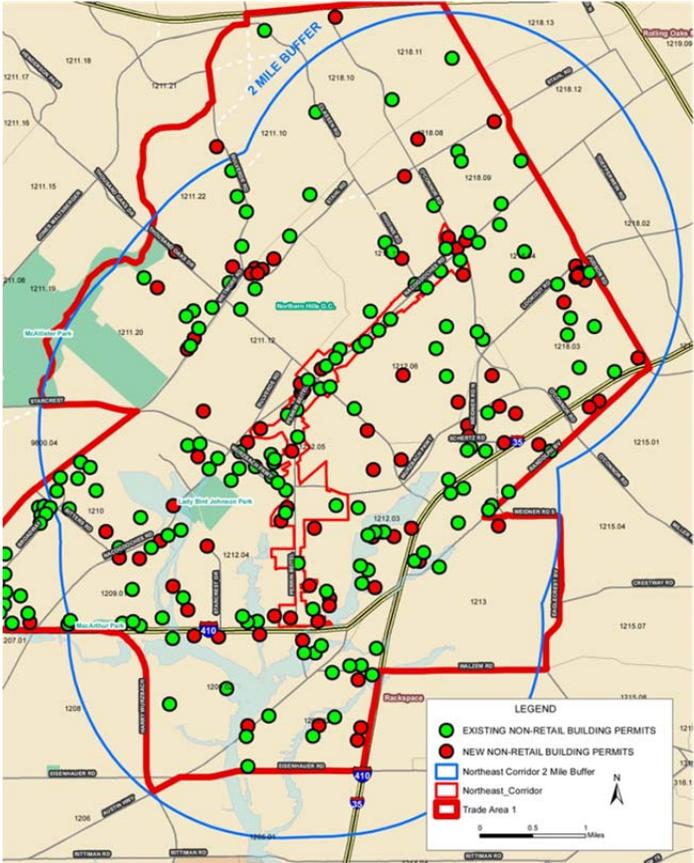


Retail Building Permits

| Year | Bars, Taverns | | Food Related | | Retail Services | | | Total Retail | |
|--------------|---------------|----------|--------------|----------|-----------------|-----------|-----------|--------------|------------|
| | N | E | N | E | N | E | N | E | |
| 2008 | 0 | 0 | 0 | 0 | 9 | 3 | 21 | 33 | 57 |
| 2009 | 0 | 2 | 0 | 0 | 2 | 6 | 6 | 16 | 30 |
| 2010 | 0 | 4 | 0 | 0 | 4 | 7 | 5 | 15 | 31 |
| 2011 | 1 | 0 | 1 | 0 | 3 | 7 | 14 | 11 | 35 |
| 2012 | 0 | 0 | 1 | 0 | 1 | 7 | 6 | 9 | 23 |
| 2013 | 0 | 0 | 0 | 0 | 3 | 0 | 12 | 15 | 27 |
| Total | 1 | 6 | 2 | 0 | 10 | 39 | 34 | 84 | 167 |

N = Permits for New Structures;
E = Permits for Existing Structures

Map 6. Non-Retail Building Permits



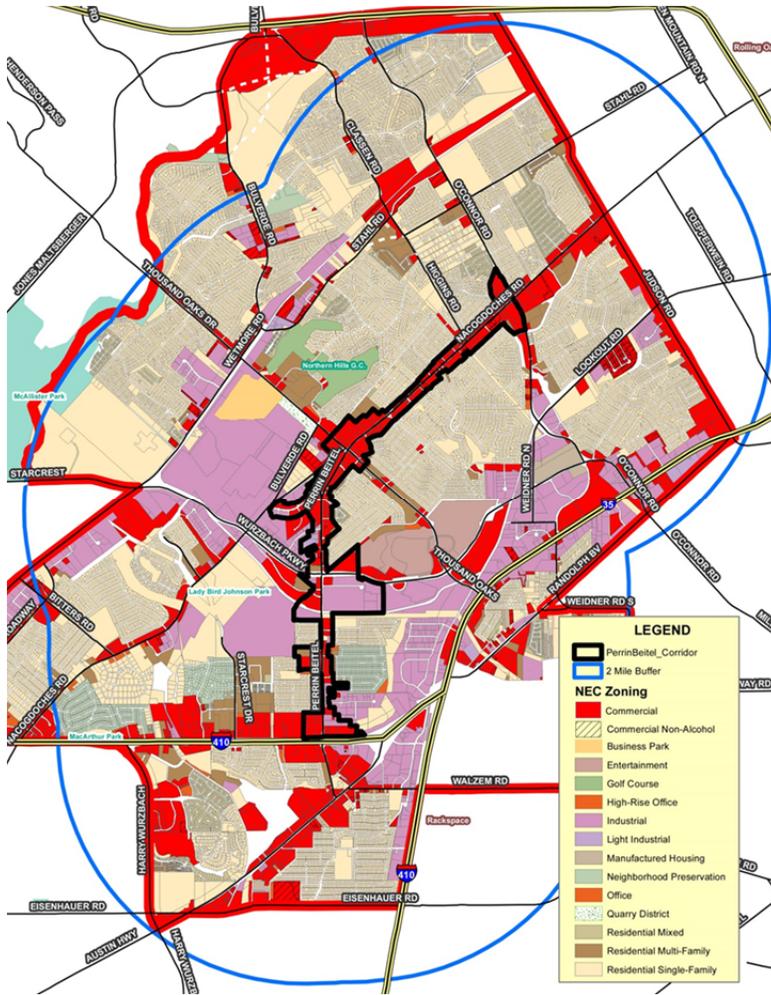
Non-Retail Building Permits

| Permit Type | New | Existing | Total |
|--------------------------|-----|----------|-------|
| Non-Retail | 121 | 206 | 327 |
| Amusements | 3 | 4 | 7 |
| Animal Related | 1 | 1 | 2 |
| Auto Related | 10 | 11 | 21 |
| Church | 3 | 9 | 12 |
| Industrial | | 2 | 2 |
| Manufacturing | 8 | 2 | 10 |
| Office Warehouse | 41 | 86 | 127 |
| Printers | 1 | 0 | 1 |
| Recreation | 7 | 3 | 10 |
| Rentals | 1 | 0 | 1 |
| Schools | 13 | 31 | 44 |
| Social | 1 | 1 | 2 |
| Storage | 2 | 1 | 3 |
| Utilities (incl attenas) | 5 | 37 | 42 |
| Warehouse-Showroom | 25 | 18 | 43 |

A majority of non-retail building permits since 2008 have been for Office Warehouse and Warehouse Showroom construction.

New construction at schools accounted for 13 permits and 31 permits were issued for additions and alterations at schools.

Map 7. Zoning in the Trade Area



Zoning in the Trade Area

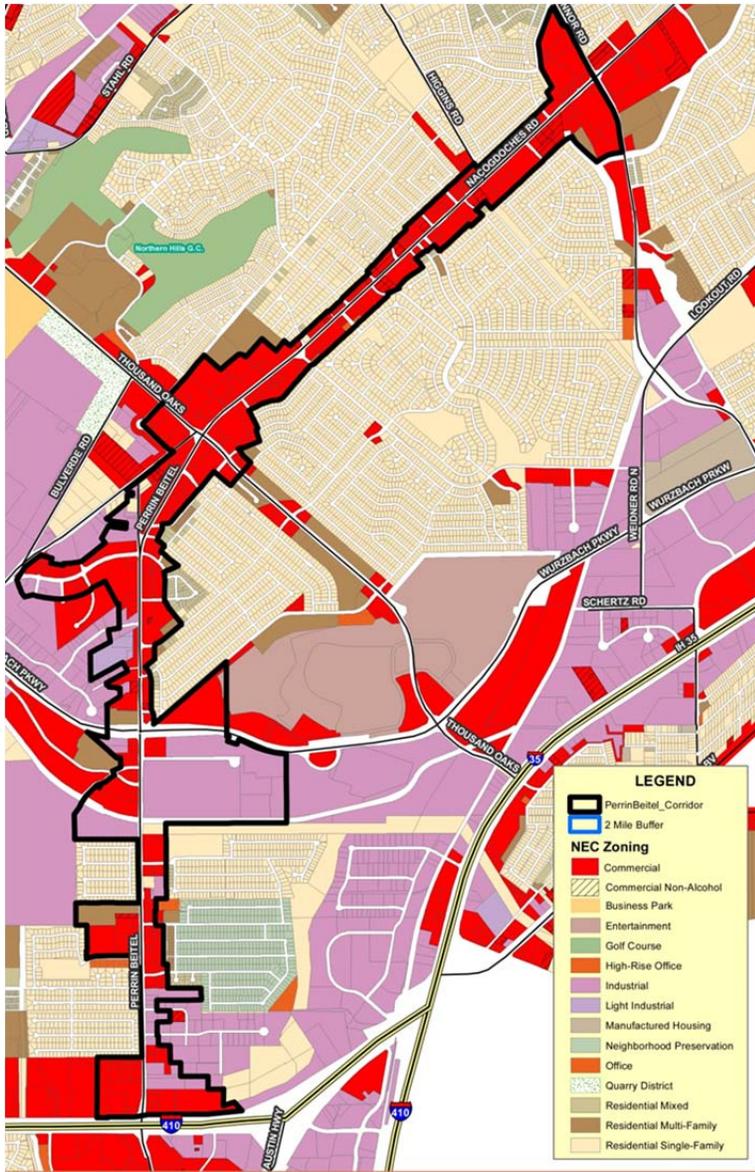
| Zoning Description | Acres | Pct of Total |
|---------------------------|-----------------|---------------|
| Commercial | 2574.41 | 16.8% |
| Business Park | 85.27 | 0.6% |
| Entertainment District | 224.18 | 1.5% |
| Golf Course | 135.45 | 0.9% |
| High Rise Office | 83.75 | 0.5% |
| Industrial | 2545.20 | 16.6% |
| Light Industrial | 49.69 | 0.3% |
| Manufactured Housing | 70.45 | 0.5% |
| Neighborhood Preservation | 296.48 | 1.9% |
| Office low rise | 4.38 | 0.0% |
| Quarry District | 26.07 | 0.2% |
| Residential Mixed | 359.64 | 2.3% |
| Residential Single-Family | 7435.34 | 48.5% |
| Other | 1428.62 | 9.3% |
| Trade Area Totals | 15318.93 | 100.0% |

Zoning in the Trade Area

As should be expected in a Trade Area, zoning for residential covers more than 55% of the land. This includes Single Family, Mixed, Multi-Family and Manufactured housing allowed uses.

Surprisingly, Commercial and Industrial zoning are almost balanced at 18.3% for Commercial & Entertainment; and 16.9% for Industrial, which includes Light Industrial and Business Park **zoning**.

Map 8. Zoning in the Corridor



Zoning in the Corridor

| Zoning Description | Acres | Pct of Total |
|----------------------------------|---------------|---------------|
| Commercial | 355.93 | 65.3% |
| Commercial - Non-Alcohol | 16.88 | 3.1% |
| Commercial - Restrictive Alcohol | 10.04 | 1.8% |
| Entertainment | 1.37 | 0.3% |
| High-Rise Office | 1.32 | 0.2% |
| Industrial | 129.95 | 23.8% |
| Light Industrial | 8.88 | 1.6% |
| Residential Multi-Family | 16.94 | 3.1% |
| Residential Single-Family | 3.80 | 0.7% |
| Grand Total NEC Corridor | 545.11 | 100.0% |

| Zoning Description | Zoning Acres | Land Use Acres | Percent Difference |
|---------------------------|--------------|----------------|--------------------|
| Commercial | 385.54 | 385.46 | 0.02% |
| Industrial | 138.83 | 1.88 | 98.60% |
| Residential Multi-Family | 16.94 | 22.62 | -51.20% |
| Residential Single-Family | 3.8 | 0.00 | 100.00% |

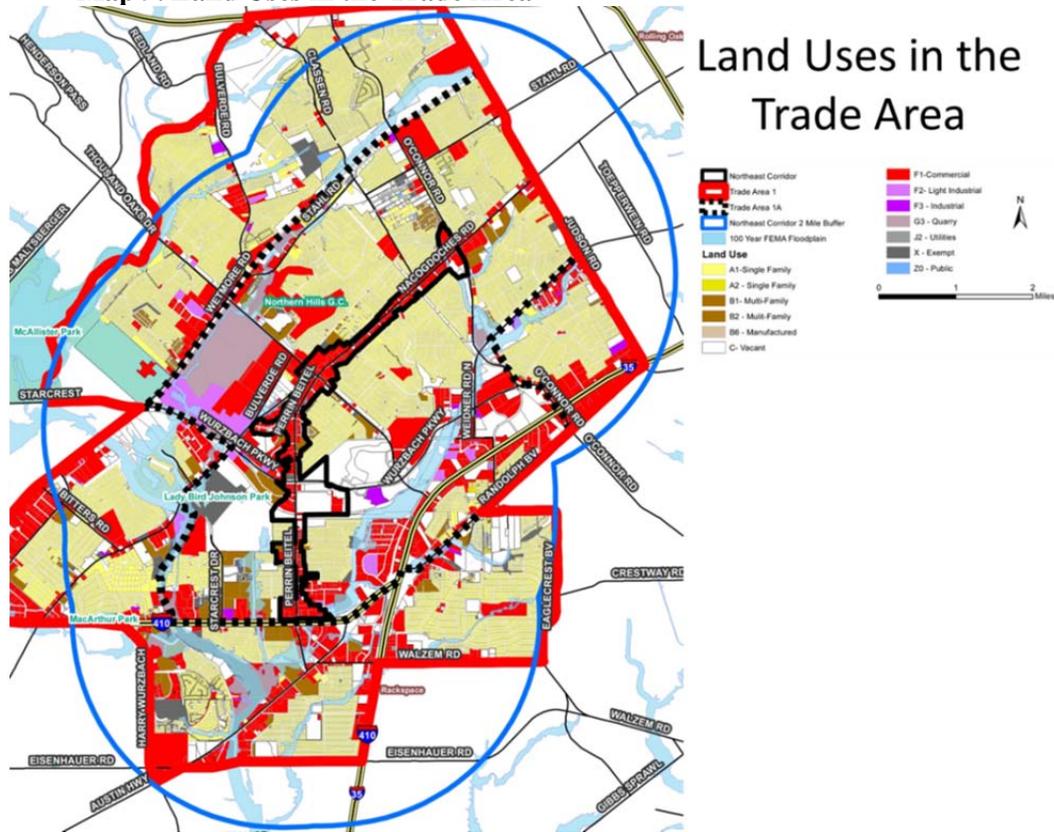
Zoning in the Corridor

The Northeast Corridor is truly a commercial corridor in terms of zoning, where 70.5% of the land area is zoned for Commercial uses.

Industrial and Light Industrial zoning cover 25.4% of land in the Corridor, and multi-family residential zoning is 3.1% of the land. Although there are a few acres of single family zoning, there are no single family uses.

Based on the comparison of zoning and land use within the Corridor, it appears the Corridor is significantly over-zoned with Industrial zoning, as shown on the following comparison of zoning with land use.

Map 9. Land Uses in the Trade Area



Land Uses and Property Values in the Trade Area

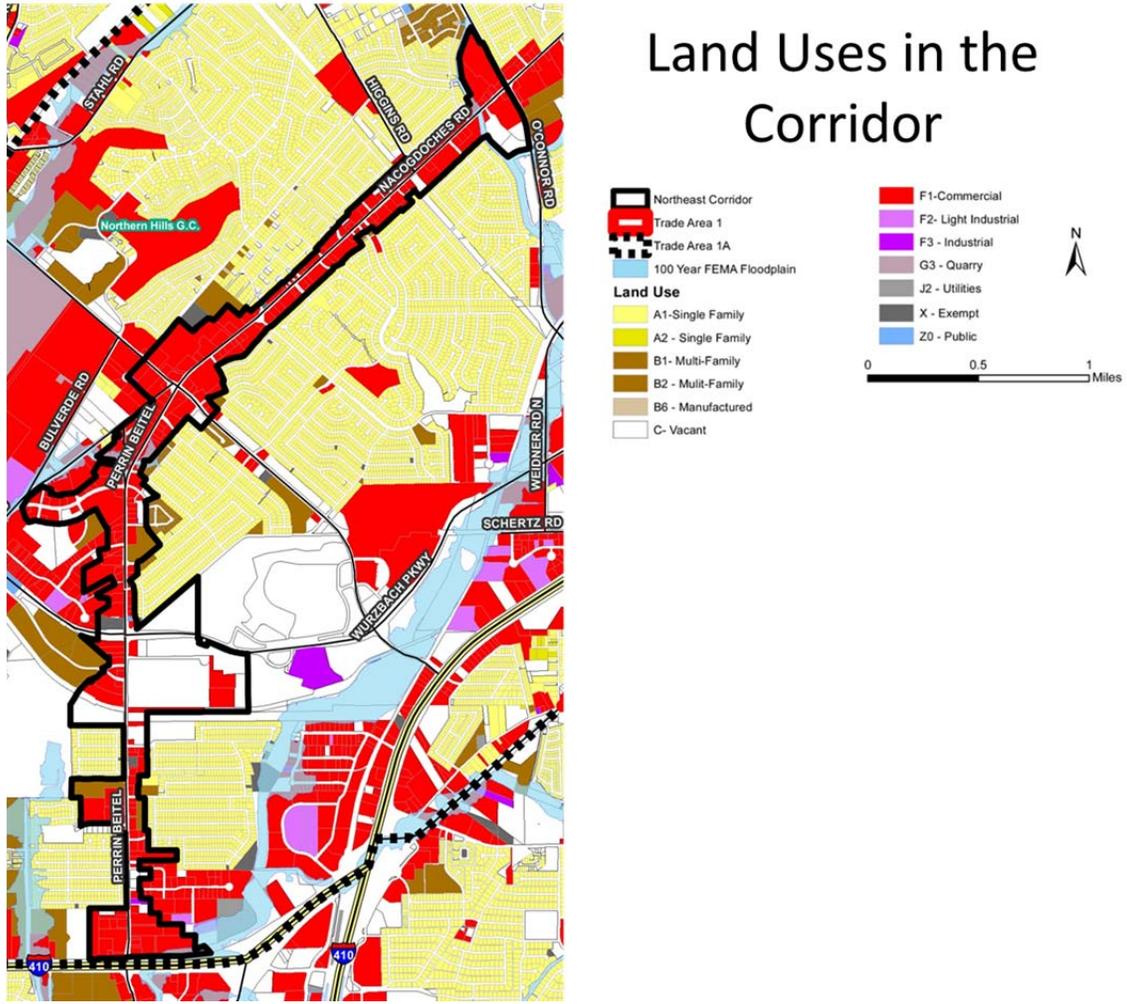
| State_Code | Land Use | Number Parcels | GIS Acres | Pct of Total | Land_Value | Impr_Value | Total_Value | Pct of Tot Value |
|-----------------------------|---------------|-------------------|-----------------|-----------------|------------------------|------------------------|------------------------|---------------------|
| A1 | Single Family | 29506 | 6039.50 | 39.8% | \$708,909,418 | \$2,829,520,217 | \$3,538,429,635 | 62.1% |
| A2 | SF-Attached | 22 | 12.74 | 0.1% | \$545,960 | \$194,490 | \$740,450 | 0.0% |
| B1 | Duplex | 457 | 96.56 | 0.6% | \$10,805,500 | \$46,838,478 | \$57,643,978 | 1.0% |
| B2 | Multi-Family | 73 | 501.47 | 3.3% | \$64,520,900 | \$365,177,733 | \$429,698,633 | 7.5% |
| B6 | Manuf | 28 | 6.48 | 0.0% | \$654,750 | \$2,695,500 | \$3,350,250 | 0.1% |
| C1 | Vacant Land | 1097 | 2162.84 | 14.3% | \$80,115,020 | \$0 | \$80,115,020 | 1.4% |
| D1 | Vacant Land | 19 | 371.50 | 2.4% | \$19,549,980 | \$0 | \$19,549,980 | 0.3% |
| D2 | Vacant Land | 2 | 53.22 | 0.4% | \$1,502,350 | \$3,760 | \$1,506,110 | 0.0% |
| E1 | Vacant Land | 82 | 1055.23 | 7.0% | \$18,759,065 | \$355,330 | \$19,114,395 | 0.3% |
| E3 | Vacant Land | 2 | 88.06 | 0.6% | \$1,970,080 | \$55,140 | \$2,025,220 | 0.0% |
| F1 | Commercial | 1605 | 3559.93 | 23.5% | \$456,251,611 | \$1,016,558,648 | \$1,472,810,259 | 25.9% |
| F2 | Lt Industrial | 37 | 273.06 | 1.8% | \$10,400,040 | \$37,213,945 | \$47,613,985 | 0.8% |
| F3 | Industrial | 41 | 83.00 | 0.5% | \$7,021,698 | \$340,038 | \$7,361,736 | 0.1% |
| G3 | Quarry | 8 | 280.04 | 1.8% | \$2,885,520 | \$0 | \$2,885,520 | 0.1% |
| J2-J7 | Utilities | 15 | 31.46 | 0.2% | \$1,251,450 | \$1,229,760 | \$2,481,210 | 0.0% |
| M1 | MH | 1 | 0.25 | 0.0% | \$11,640 | \$5,090 | \$16,730 | 0.0% |
| O1 | Vac Res Lots | 20 | 4.24 | 0.0% | \$467,000 | \$122,270 | \$589,270 | 0.0% |
| X | Exempt | 156 | 472.69 | 3.1% | \$5,375,260 | \$2,662,580 | \$8,037,840 | 0.1% |
| Z0 | Public Owned | 14 | 14.10 | 0.1% | \$37,370 | \$234,350 | \$271,720 | 0.0% |
| Trade Area Totals | | 33185 | 15168.90 | 100.0% | \$1,391,034,612 | \$4,303,207,329 | \$5,694,241,941 | 100.0% |
| Subtotal Vacant Land | | 1202 | 3730.85 | 24.6% | \$121,896,495 | \$414,230 | \$122,310,725 | 2.1% |

Bexar Appraisal District tax records and geography show there are 15,168.9 acres in the Trade Area, approximately 23.7 square miles.

Total appraised property value in the Trade Area was \$5,694,241,941 based on 2012 records, with a total 70.7% of value in residential uses. (A1, A2, B1, B2 & B6)

Vacant land covers 24.6% of total land, with residential uses covering 43.8% of total land.

Map 10. Land Uses in the Corridor



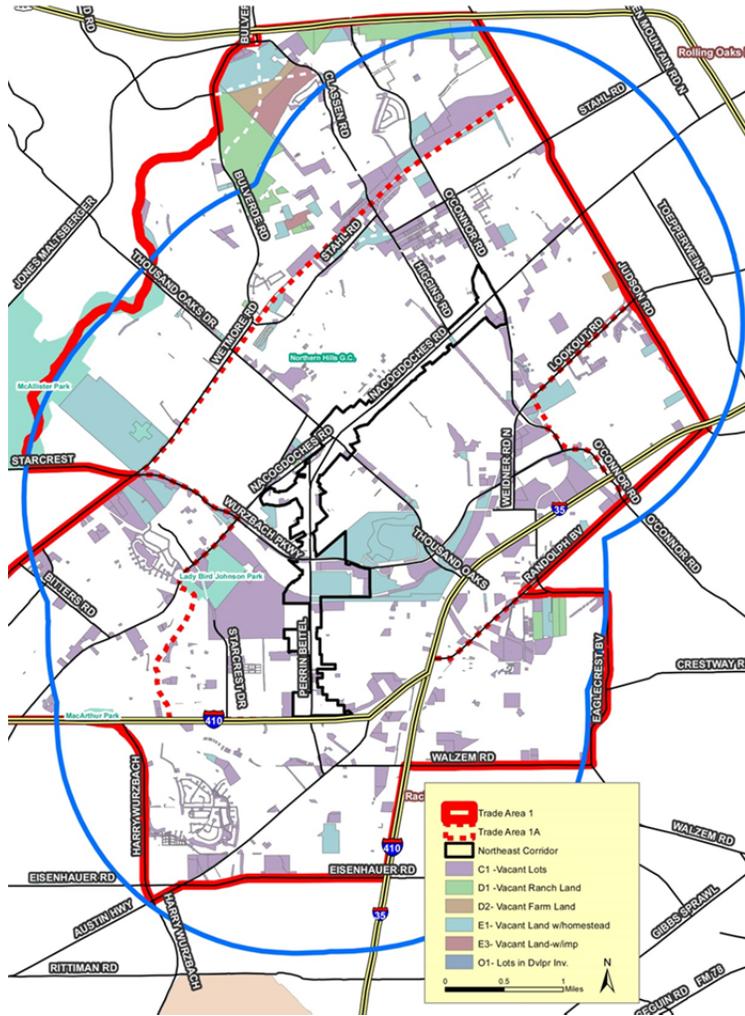
Within the Northeast Corridor, there are 556.82 acres, less than 94/100 of a square mile, and an estimated 304 parcels within the Corridor.

Total appraised property value in the Corridor was \$206,533,593 based on 2012 records, which was 89.4% of total appraised value of land and improvements. This would represent the base valuation if a TIRZ is created, depending on what year the TIRZ becomes effective.

Land Uses and Property Values in the Corridor

| State_Code | Land Use Description | Number Parcels | Acres | Pct_of _Total | Land_Value | Impr_Value | Total_Value | Pct_of_ Total |
|--|---------------------------|-------------------|--------|------------------|--------------|---------------|---------------|------------------|
| B2 | Multi Family - Apartments | 4 | 22.62 | 4.1% | \$2,353,940 | \$13,896,060 | \$16,250,000 | 7.9% |
| C1 | Vacant Lots | 37 | 79.42 | 14.3% | \$4,143,030 | \$0 | \$4,143,030 | 2.0% |
| E1 | Vacant Land | 4 | 64.80 | 11.6% | \$669,530 | \$0 | \$669,530 | 0.3% |
| F1 | Commercial Uses | 251 | 385.46 | 69.2% | \$77,965,860 | \$106,774,656 | \$184,740,516 | 89.4% |
| F2 | Light Industrial Uses | 1 | 0.22 | 0.0% | \$27,970 | \$36,347 | \$64,317 | 0.0% |
| F3 | Industrial | 3 | 1.66 | 0.3% | \$258,110 | \$300 | \$258,410 | 0.1% |
| J7 | Utilities - Time Warner | 1 | 0.90 | 0.2% | \$146,710 | \$70,130 | \$216,840 | 0.1% |
| X | Exempt Uses | 2 | 1.43 | 0.3% | \$150,150 | \$40,800 | \$190,950 | 0.1% |
| Z0 | Public - Owned | 1 | 0.31 | 0.1% | \$0 | \$0 | \$0 | 0.0% |
| CORRIDOR TOTALS | | 304 | 556.82 | 100.0% | \$85,715,300 | \$120,818,293 | \$206,533,593 | 100.0% |
| Vacant Lots and vacant land total 41 parcels, 133.2 net (legal) acres (30.7%), 144.2 gross (GIS) acres (25.9%), and \$4,812,560 total valuation. | | | | | | | | |

Map 11. Vacant Land in the Trade Area

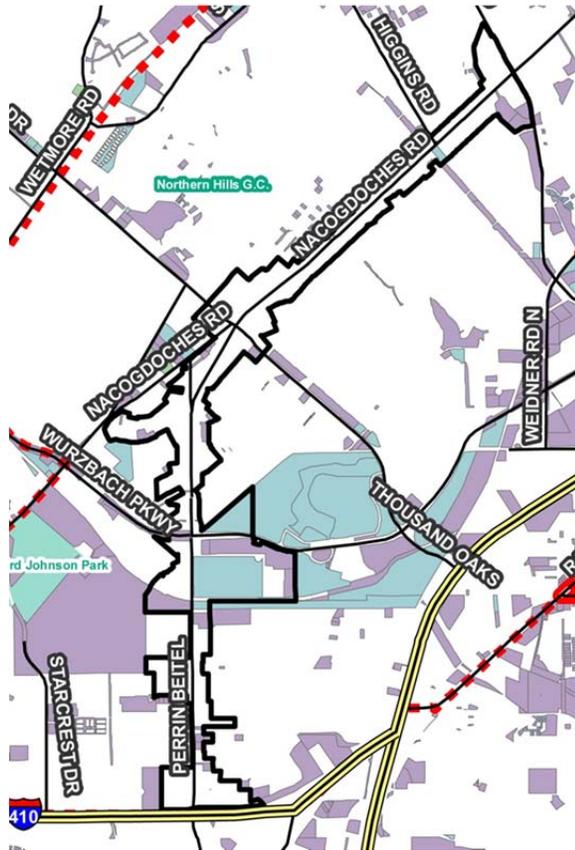


Vacant Land in the Trade Area

| Land Type | Nbr of Parcels | Acres | Total_Value |
|-------------------------|----------------|--------------|----------------------|
| Vacant Lots | 1097 | 2162.84 | \$80,115,020 |
| Vac Ranch Land | 19 | 371.50 | \$19,549,980 |
| Vac Farm Land | 2 | 53.22 | \$1,506,110 |
| Vac Est Land w/hmstd | 82 | 1055.23 | \$19,114,395 |
| Vac Est Land w/imp | 2 | 88.06 | \$2,025,220 |
| Res. Lots in Dvlpr Inv. | 20 | 4.24 | \$589,270 |
| Totals | 1,222 | 3,735 | \$122,899,995 |

- Vacant Land in the Trade Area has an appraised value of \$122,899,995.
- Vacant Land represents 3,735 acres and 1,202 acres in the Trade Area.

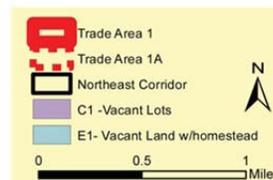
Map 12. Vacant Land in the Corridor



Vacant Land in the Corridor

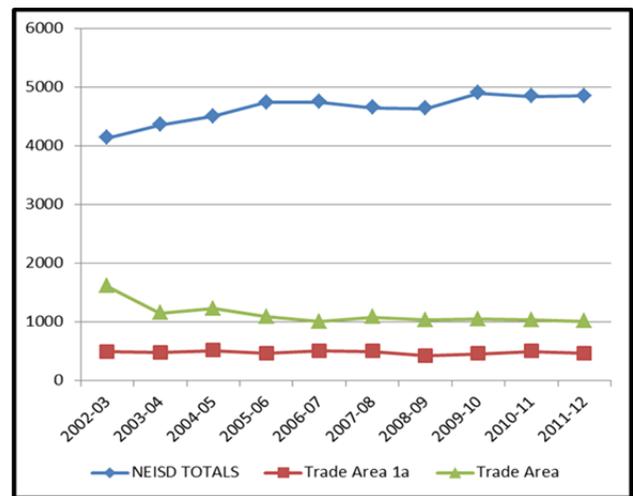
| Land Type | Total Value | Acres | Nbr of Parcels |
|----------------------|--------------------|---------------|----------------|
| Vacant Lots | \$4,143,030 | 79.42 | 37 |
| Vac Est Land w/hmstd | \$669,530 | 64.80 | 4 |
| Total | \$4,812,560 | 144.22 | 41 |

- Actual Vacant Land is 139.45 acres, which is 25% of the 556.82 acres of total land in the Corridor.
- U.S. Post Office vacant land of 4.771 acres indicated by the Bexar Appraisal District is not included in the 139.45 acres above.
- The appraised value of vacant land in the Corridor is \$4,812,560 and includes 40 parcels.



Trends in North East ISD Kindergarten Enrollment in Trade Area Schools

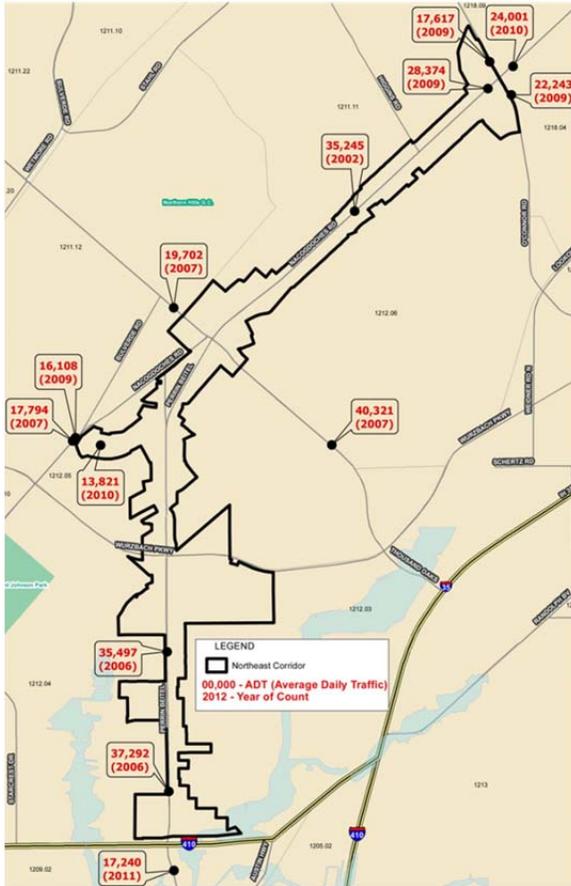
| | 2002-03 | 2003-04 | 2004-05 | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | 2011-12 | % Change 02/03-11/12 |
|----------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|----------------------|
| Elementary | | | | | | | | | | | |
| Serna | 102 | 87 | 75 | 91 | 91 | 91 | 61 | 79 | 78 | 78 | -31% |
| El Dorado | 79 | 88 | 106 | 82 | 98 | 100 | 112 | 107 | 119 | 93 | 15% |
| Clear Spring | 74 | 85 | 78 | 86 | 88 | 82 | 76 | 80 | 81 | 93 | 20% |
| Stahl | 171 | 154 | 175 | 136 | 157 | 147 | 121 | 125 | 148 | 143 | -20% |
| Oak Grove | 67 | 64 | 79 | 68 | 69 | 77 | 56 | 64 | 76 | 58 | -16% |
| Northern Hills | 117 | 123 | 133 | 109 | 93 | 124 | 109 | 109 | 111 | 115 | -2% |
| Welmore | 176 | 159 | 161 | 149 | 139 | 130 | 122 | 128 | 143 | 115 | -53% |
| Longs Creek | 163 | 162 | 166 | 155 | 130 | 156 | 115 | 114 | 126 | 111 | -47% |
| Woodstone | 180 | 189 | 184 | 134 | 113 | 127 | 142 | 139 | 146 | 123 | -46% |
| Redland Oaks | 75 | 88 | 137 | 101 | 95 | 87 | 78 | 60 | 69 | 61 | -23% |
| Walzem | 123 | 115 | 115 | 96 | 102 | 98 | 100 | 135 | 117 | 126 | 2% |
| Regency Place | 77 | 86 | 90 | 88 | 98 | 96 | 93 | 102 | 95 | 97 | 21% |
| Wilshire | 55 | 84 | 77 | 66 | 51 | 49 | 62 | 60 | 37 | 43 | -28% |
| East Terrell Hills | 60 | 68 | 79 | 115 | 99 | 105 | 94 | 86 | 94 | 108 | 44% |
| Windcrest | 89 | 80 | 84 | 76 | 85 | 112 | 116 | 117 | 96 | 113 | 21% |
| NEISD TOTALS | 4132 | 4355 | 4503 | 4736 | 4745 | 4646 | 4629 | 4898 | 4839 | 4846 | 15% |
| Trade Area 1a | 493 | 478 | 513 | 463 | 503 | 497 | 426 | 455 | 502 | 465 | -6% |
| Trade Area | 1608 | 1154 | 1226 | 1089 | 1005 | 1084 | 1031 | 1050 | 1034 | 1012 | -59% |



The table and graph above reflect the trend discussed among respondents to the survey questionnaire: *elementary school enrollment appears to be declining in Trade Area schools, based on kindergarten enrollment for a recent 10-year period, 2002-03 to 2011-12 school years.*

While North East ISD kindergarten enrollment has *increased* by **15%** over the ten years, kindergarten enrollment in the Trade Area has *decreased* by **59%** and the smaller Trade Area 1a decreased by **6%** during the same time.

Map 13. TRAFFIC COUNTS IN THE CORRIDOR



Traffic Counts in the Corridor

| MajorStreet | Location | MinorStreet | Direction | ADT Volume |
|------------------|----------|----------------|-----------|------------|
| Nacogdoches Rd | W of | O'Connor Rd | EB/WB | 28374 |
| Nacogdoches Rd | E of | O'Connor Rd | EB/WB | 28754 |
| Nacogdoches Rd | S of | Naco-Perrin | NB/SB | 16108 |
| O'Connor Rd | E of | Nacogdoches Rd | EB/WB | 24001 |
| Perrin Beitel Rd | S of | Bretton Ridge | NB/SB | 37292 |

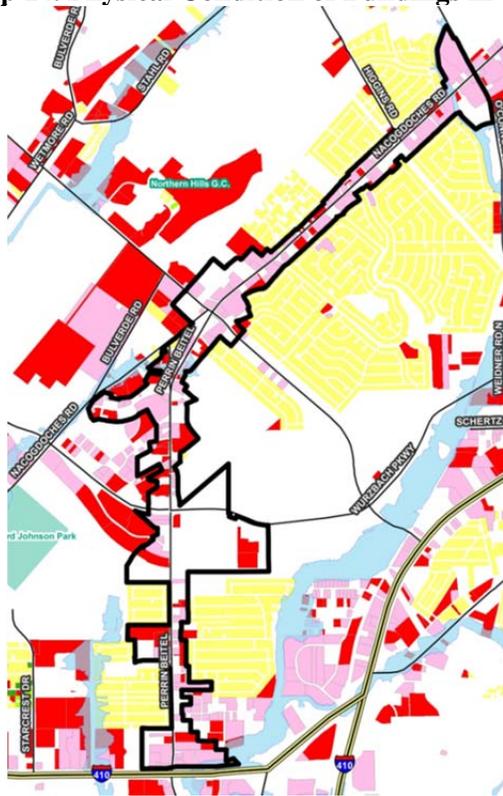
- Traffic in comparable corridors per **TXDOT 2010 counts**
- Austin Hwy – 16,500 to 27,000 ADT
 - Bandera Rd – Inside Loop 410
25,000 to 26,000 ADT
 - Blanco Rd - Loop 410 to 1604
27,000 to 35,000 ADT
 - Fredericksburg Rd – Inside Loop 410
14,380 to 24,430 ADT
 - Gibbs Sprawl – 24,000 ADT typical
 - Grissom/Culebra – Bandera to Loop 1604
26,000 to 40,000 ADT
 - Military Dr SW 17,000 to 45,000 ADT
 - Military Dr SE 14,500 to 27,000 ADT

While traffic counts have declined between 10% and 20% over the past several years, the Northeast Corridor can hold its own against other corridors in the City with counts ranging from 35,000 to 37,000 on the lower part of Perrin Beitel to over 28,000 ADT along Nacogdoches between Thousand Oaks and O'Connor.

Northeast Corridor traffic counts are exceeded only by Grissom/Culebra with up to 40,000 ADT and SW Military Dr with 45,000 ADT.

| MajorStreet | Location | MinorStreet | Direction | Count Date | ADT Volume | Combined ADT Volume | Year of Count | Street Width | Speed Limit | Lane Configuration |
|------------------|----------|----------------|-----------|------------|------------|---------------------|---------------|--------------|-------------|---------------------|
| Nacogdoches Rd | W of | Aspen View | EB/WB | 10/30/2002 | 17528 | 35245 | (2002) | 64 | 40 | Five Lane |
| Nacogdoches Rd | S of | Naco-Perrin | NB/SB | 10/30/2007 | 16767 | 17794 | (2007) | 58 | 40 | Four Lane Divided |
| Nacogdoches Rd | W of | O'Connor Rd | EB/WB | 3/2/2009 | 12228 | 28374 | (2009) | 65 | 45 | Five Lane Undivided |
| Nacogdoches Rd | E of | O'Connor Rd | EB/WB | 3/2/2009 | 14302 | 28754 | (2009) | 65 | 45 | Five Lane Undivided |
| Nacogdoches Rd | S of | Naco-Perrin | NB/SB | 9/10/2009 | 8293 | 16108 | (2009) | 60 | 40 | Four Lane Divided |
| Naco-Perrin | E of | Nacogdoches Rd | EB/WB | 2/2/2009 | 9448 | 9448 | (2009) | 62 | | Four Lane Divided |
| Naco-Perrin | E of | Nacogdoches Rd | EB/WB | 2/18/2010 | 4373 | 13821 | (2010) | 63 | 35 | Six Lane Divided |
| O'Connor Rd | S of | Nacogdoches Rd | NB/SB | 1/28/2008 | 20211 | 20211 | (2008) | 70 | 45 | Five Lane |
| O'Connor Rd | S of | Nacogdoches Rd | NB/SB | 3/2/2009 | 11855 | 22243 | (2009) | 70 | 40 | Four Lane Undivided |
| O'Connor Rd | N of | Nacogdoches Rd | NB/SB | 3/2/2009 | 8180 | 17617 | (2009) | 54 | 40 | Four Lane Undivided |
| O'Connor Rd | E of | Nacogdoches Rd | EB/WB | 4/13/2010 | 11832 | 24001 | (2010) | 45 | 40 | Four Lane Undivided |
| Perrin Beitel Rd | S of | Bretton Ridge | NB/SB | 1/11/2006 | 18601 | 37292 | (2006) | 64 | 45 | Five Lane |
| Perrin Beitel Rd | S of | Clear Spring | NB/SB | 6/22/2006 | 17869 | 35497 | (2006) | 64 | 40 | Five Lane |
| Perrin Beitel Rd | S of | Loop 410 | NB/SB | 1/28/2008 | 18141 | 26678 | (2008) | 56 | 40 | Five Lane |
| Perrin-Beitel Rd | S of | Loop 410 | NB/SB | 8/30/2011 | 8537 | 17240 | (2011) | 55 | 40 | Five Lane |
| Thousand Oaks | W of | Schertz | EB/WB | 10/29/2007 | 20619 | 40321 | (2007) | 84 | 35 | Four Lane Divided |

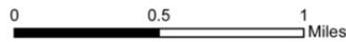
Map 14. Physical Condition of Buildings in the Corridor



Physical Condition of Buildings in the Corridor

Building Condition

- 1 Excellent
- 2 Above Average
- 3 Average
- 4 Below Average
- 5 Well Below Average
- Northeast Corridor
- 100 Year FEMA Floodplain



With pink properties Below Average and red being Well Below Average, very little of the Corridor is in acceptable condition.

Physical Condition of Buildings in the Trade Area

Observations by almost everyone are confirmed in the table and map on Physical Condition according to the Bexar Appraisal District file on Improvement Details for 2012.

A very high **99.7% of single family homes are Average condition or above**, while the opposite is true for Commercial buildings in the Trade Area with **98.3% Below Average** condition. Of the total number of buildings, 971 are below average condition.

| State Code | Land Use | Excellent | Above Average | Average | Below Average | Well Below Average | Low Cost | Special Class | Total Each Class |
|-----------------------------|----------------|-------------|---------------|--------------|---------------|--------------------|---|---------------|------------------|
| A1 | Single Family | 204 | 4676 | 24270 | 2 | 68 | 3 | 6 | 29229 |
| A2 | Mobile Home | 0 | 0 | 15 | 0 | 0 | 3 | 0 | 18 |
| B1 | Duplex | 0 | 134 | 295 | 0 | 0 | 0 | 0 | 429 |
| B2 | Multi-Family | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| B6 | Mfrd Homes | 0 | 12 | 12 | 0 | 0 | 0 | 0 | 24 |
| C1 | Vacant Land | 0 | 0 | 19 | 0 | 1 | 0 | 0 | 20 |
| E1 | Vacant Land | 0 | 0 | 4 | 0 | 0 | 0 | 0 | 4 |
| F1 | Commercial | 0 | 2 | 13 | 671 | 200 | 0 | 0 | 886 |
| F2 | Lt. Industrial | 0 | 0 | 0 | 14 | 1 | 0 | 198 | 213 |
| F3 | Industrial | 0 | 0 | 0 | 0 | 0 | 0 | 12 | 12 |
| X | Exempt Uses | 0 | 3 | 23 | 1 | 2 | 0 | 0 | 29 |
| Z0 | Public Owned | 0 | 0 | 0 | 3 | 2 | 0 | 0 | 5 |
| Trade Area Subtotals | | 204 | 4827 | 24651 | 691 | 274 | 6 | 216 | 30869 |
| Percent of Total | | 0.7% | 15.6% | 79.9% | 2.2% | 0.9% | 0.0% | 0.7% | 100.0% |
| | | | | | | | 971 properties below average condition, 3.1% of total | | |

Note: This table does not include 3,000 parcels for which no "Class" judgement of condition was assigned

This table verifies what most survey respondents have stated: *commercial buildings in the Corridor are terribly run-down*. It also shows that most residential structures are in “average” condition with less than 16% of residential structures in the Trade Area in above average condition or better.

Retail Market Profile and Gap Analysis

A Retail Market Gap Analysis is a way of measuring the relationship of a retail center or corridor with its trade area, however defined. The Gap is either negative or positive with the negative gap representing a surplus gap of sales over demand within the trade area. With respect to merchants in those industry groups that have a surplus, this is a good situation and means that far more sales are occurring at that location than are being consumed by households within the trade area.

However, the positive gap represents a LEAKAGE gap of sales to other locations outside the subject area and sales is less than demand by households within the trade area. For merchants in those industry groups that have leakage, it indicates that households in the trade area are shopping elsewhere and presents an opportunity for those merchants to increase sales. In the case of the Northeast Corridor, it means opportunity for additional stores in the industry groups showing a LEAKAGE gap.

Retail Market Place Profile

The Trade Area retail market in 2012 experienced more than \$970 million in retail trade, food & drink sales through 804 establishments.

Consumer households in the Trade Area spent more than \$955 million during the same year, leaving a retail *Surplus* Gap of (\$14,604,768).

Total Retail Trade in the Trade Area showed almost \$867 million through 690 establishments with households spending more than \$859 million, leaving a *Surplus* Gap of (\$7,636,235).

Total Food & Drink sales in 2012 were \$103.4 million through 114 establishments, while households spent \$96.4 million and left a smaller *Surplus* Gap of almost (\$7 million).

Retail MarketPlace Profile in the Trade Area

| Industry Summary | Industry Group | Demand (Retail Potential) | Supply (Retail Sales) | Leakage/ Surplus Retail Gap | Leakage/ Surplus Factor | Nbr of Estabs |
|---|----------------|---------------------------|-----------------------|-----------------------------|-------------------------|---------------|
| Total Retail Trade and Food & Drink | 44-45,722 | \$955,479,212 | \$970,083,980 | (\$14,604,768) | (0.8) | 804 |
| Total Retail Trade | 44-45 | \$859,069,324 | \$866,705,559 | (\$7,636,235) | (0.4) | 690 |
| Total Food & Drink | 722 | \$96,409,887 | \$103,378,421 | (\$6,968,533) | (3.5) | 114 |
| Industry Group | | | | | | |
| Motor Vehicle & Parts Dealers | 441 | \$168,062,887 | \$101,403,473 | \$66,659,414 | 24.7 | 68 |
| Furniture & Home Furnishings Stores | 442 | \$19,979,063 | \$27,192,097 | (\$7,213,035) | (15.3) | 53 |
| Electronics & Appliance Stores | 4431 | \$25,176,981 | \$18,262,277 | \$6,914,704 | 15.9 | 38 |
| Bldg Materials, Garden Equip. & Supply Stores | 444 | \$26,818,030 | \$54,333,606 | (\$27,515,576) | (33.9) | 49 |
| Food & Beverage Stores | 445 | \$152,860,598 | \$160,877,502 | (\$8,016,904) | (2.6) | 72 |
| Health & Personal Care Stores | 4,464,461 | \$64,106,215 | \$122,139,027 | (\$58,032,812) | (31.2) | 38 |
| Gasoline Stations | 4,474,471 | \$100,684,198 | \$283,365,370 | (\$182,681,172) | (47.6) | 14 |
| Clothing & Clothing Accessories Stores | 448 | \$53,189,543 | \$13,864,954 | \$39,324,589 | 58.6 | 66 |
| Sporting Goods, Hobby, Book & Music Stores | 451 | \$22,243,666 | \$22,249,765 | (\$6,099) | 0.0 | 52 |
| General Merchandise Stores | 452 | \$153,784,315 | \$5,261,241 | \$148,523,073 | 93.4 | 9 |
| Miscellaneous Store Retailers | 453 | \$23,111,401 | \$31,458,420 | (\$8,347,019) | (15.3) | 185 |
| Nonstore Retailers | 454 | \$49,052,427 | \$26,297,827 | \$22,754,601 | 30.2 | 48 |
| Food Services & Drinking Places | 722 | \$96,409,887 | \$103,378,421 | (\$6,968,533) | (3.5) | 114 |

Industry Groups in the Trade Area showing a Significant *Surplus* Gap of sales totaled more than \$193 million through 257 establishments with households spending more than \$72 million, leaving a gap of \$120,931,479.

Surplus is experienced when there are more in sales in an area than purchases by consumers of that area.

Almost half of the Retail Gap (\$52,928,053) occurred in Auto Parts, Accessories & Tires Industry Group.

Industry Groups with a Significant SURPLUS Gap

| Industry Summary | Industry Group | Demand (Retail Potential) | Supply (Retail Sales) | Surplus Retail Gap | Surplus Factor | Nbr of Estabs |
|-------------------------------------|----------------|---------------------------|-----------------------|--------------------|----------------|---------------|
| Auto Parts, Accessories & Tires | 4413 | \$13,961,336 | \$66,889,389 | (52,928,053.00) | (65.5) | 28 |
| Bldg Material & Supplies | 4441 | \$23,775,151 | \$53,049,556 | (29,274,404.69) | (38.1) | 46 |
| Drinking Places - Alcoholic Bev | 7224 | \$6,552,718 | \$23,907,139 | (17,354,421.49) | (57.0) | 32 |
| Furniture Stores | 4421 | \$12,047,781 | \$20,644,764 | (8,596,983.17) | (26.3) | 28 |
| Other Miscellaneous Store Retailers | 4539 | \$12,050,924 | \$18,028,668 | (5,977,744.37) | (19.9) | 94 |
| Vending Machine Operators | 4542 | \$2,965,093 | \$7,640,435 | (4,675,342.18) | (44.1) | 18 |
| Florists | 4531 | \$926,456 | \$3,050,986 | (2,124,530.23) | (53.4) | 11 |
| Total Surplus | | \$72,279,459 | \$193,210,937 | (120,931,479.13) | | 257 |

Industry Groups in the Trade Area showing a Significant *LEAKAGE* Gap of sales totaled almost \$204 million through 128 establishments with households spending more than \$265 million, leaving a *LEAKAGE* Gap of \$203,681,473.

LEAKAGE is experienced when there is more in SPENDING in an area than sales by establishments in that area. Thus, "leakage" of dollars is going outside the Trade Area.

Almost half of the Retail Leakage Gap of \$95,058,747 occurred in "Other General Merchandise Stores" Group. However, a new Wal-Mart in the Trade Area will capture at least \$50 million of total sales of Other General Merchandise Stores and Department Stores.

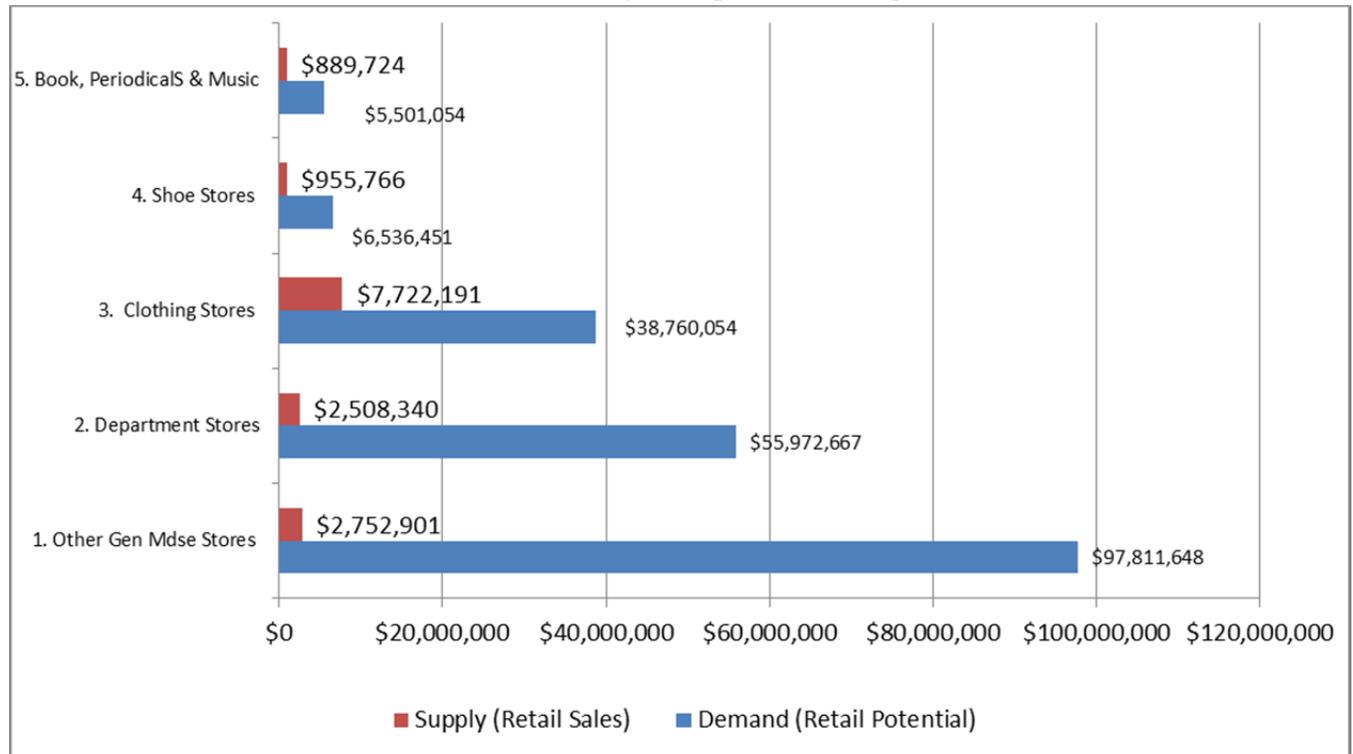
Industry Groups with a Significant LEAKAGE Gap

| Industry Summary | Industry Group | Demand (Retail Potential) | Supply (Retail Sales) | Leakage Retail Gap | Leakage Factor | Nbr of Estabs |
|---------------------------|----------------|---------------------------|-----------------------|----------------------|----------------|---------------|
| TOP TIER: | | | | | | |
| Other Gen Mdse Stores | 4529 | \$97,811,648 | \$2,752,901 | \$95,058,747 | 94.5 | 6 |
| Department Stores | 4521 | \$55,972,667 | \$2,508,340 | \$53,464,327 | 91.4 | 3 |
| Clothing/Apparel | 4481 | \$38,760,054 | \$7,722,191 | \$31,037,863 | 66.8 | 35 |
| Shoe Stores | 4482 | \$6,536,451 | \$955,766 | \$5,580,685 | 74.5 | 4 |
| Book, Periodicals & Music | 4512 | \$5,501,054 | \$889,724 | \$4,611,330 | 72.2 | 14 |
| SECOND TIER: | | | | | | |
| Ltd-Service Eating Places | 7222 | \$49,395,513 | \$39,931,762 | \$9,463,752 | 10.6 | 36 |
| Jewelry/Luggage/Leather | 4483 | \$7,893,038 | \$5,186,997 | \$2,706,041 | 20.7 | 27 |
| Lawn & Garden | 4442 | \$3,042,879 | \$1,284,050 | \$1,758,829 | 40.6 | 3 |
| Total Leakage | | \$264,913,304 | \$61,231,731 | \$203,681,573 | | 128 |

One objective of the Consultant is to determine which Industry Groups in the Trade Area show Significant *LEAKAGE* of sales, therefore indicating which types of retail stores are most likely to establish themselves within the Trade Area, specifically the Northeast Corridor.

First Tier, or Top 5, Industry groups most likely to attract new retail stores are shown on the graph below, with the *highest* leakage group – Other General Merchandise Stores at the bottom of the graph. The Second Tier of Industry Groups with potential to attract new retail stores are shown on the table above, and include– Limited Services Eating Places, Jewelry, Luggage & Leather and Lawn & Garden.

First Tier Industry Groups with Leakage



Supply is **RED** and demand is **BLUE** and a positive difference is **LEAKAGE**.

San Antonio's Market for Retail Space

Just what is the market for retail space in San Antonio and the Corridor? In the SA market for Retail space, *Net absorption is trending in an upward direction*, while vacancy rates, asking rents are, and construction activity are neither up nor down. The city's vacancy rate for retail space is 10.6% overall as of June 2013. There was positive net absorption of 118,705 sq. ft. for 1st & 2nd Quarters, an average of 20,000 sq. ft. per month. According to Kim Gatley of REOC, the Northeast Sector which includes most of Northeast San Antonio, had a vacancy rate of 12.5%.

Overall, absorption in Community Centers (100,000 to 250,000 sq. ft.) through June 2013 was +12,406 sq. ft. and -10,016 sq. ft. in the NE Sector. Vacancy in Community Centers in the NE Sector is 18.8%.

Most Retail space in the Northeast Corridor is in Neighborhood Centers, (anchored centers between 30,000 and 100,000 sq. ft.). Vacancy is 15.4% in the Northeast Sector, but there was positive absorption of 18,285 sq. ft. in 1st & 2nd Quarters 2013. Strip Centers (unanchored centers of less than 30,000 sq. ft.) show a vacancy rate of 15.1% in the Northeast Sector and negative net absorption of 22,527 sq. ft. There are 13,000 sq. ft. strip center space under construction in the Northeast Sector.

Of note is an 80,000 sq. ft. Wal-Mart *shadow* retail center on Foster Road in the Northeast Sector. Another Wal-Mart shadow retail center (50,000 sq. ft.) is under construction in Helotes. Recently, a new lease was signed in the Northglen Shopping Center by CSL Plasma for 12,650 sq. ft. on Nacogdoches Rd north of O'Connor. The Northeast Corridor can anticipate shadow retail near the new Wal-Mart if a location is found.

The current market of positive absorption and the significant leakage of retail sales in the Trade Area point to demand that should be met in the Corridor.

Recommended Retailers for Recruitment

Based on analysis of Industry Groups with Leakage, Consultant recommends the following store-types that should be recruited to place a store in the Northeast Corridor:

1. **Other General Merchandise Stores.** (Dollar General, 99 Cents Only, Dollar Tree, Ross, TJ Maxx)
2. **Department Stores** (Belk, Stein Mart)
3. **Apparel Stores** (Men: Casual Male, Men’s Warehouse; Women: Bebe, Deb, Dress Barn, Mothers Work, Talbots; Children: Children’s Place, Gymboree; All: Burlington Coat Factory)
4. **Shoe Stores.** (Rack Room, DSW, Famous Footwear, Naturalizer)
5. **Book, Periodical & Music Stores.** (Books-A-Million, Lifeway Christian Resources, CD Warehouse)

1. Other General Merchandise Stores

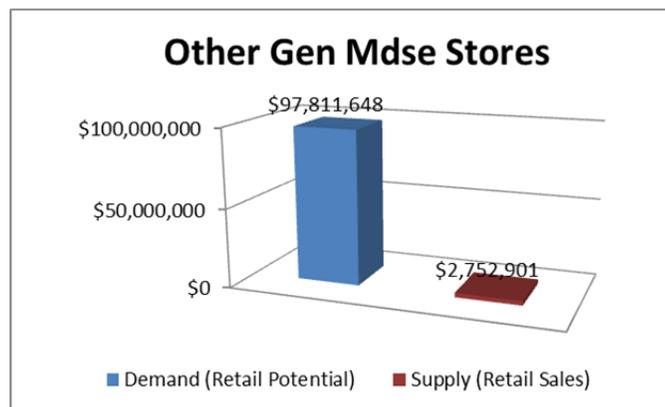
The table below shows the amount of Other General Merchandise Stores **Leakage** in the Trade Area and smaller Trade Area 1a, with only 6 establishments while 95 stores in the City of San Antonio as a whole are experiencing a **Surplus** of sales.

| | Demand | Supply | Leakage/Surplus Retail Gap | | Nbr of Estabs |
|---------------------|-----------------|-----------------|-------------------------------|---------|------------------|
| Trade Area 1a | \$50,006,815 | \$2,489,641 | \$47,517,174 | Leakage | 3 |
| Trade Area | \$97,811,648 | \$2,752,901 | \$95,058,747 | Leakage | 6 |
| City of San Antonio | \$1,229,442,246 | \$1,355,714,903 | (\$126,272,657) | Surplus | 95 |

Requirements for Other General Merchandise Stores

(99 Cents Only, Ross, TJ Maxx, Dollar Tree, Family Dollar)

- Size of store: 8,000 to 30,000
- Loading: Back door freight delivery accessible by tractor trailers.
- Location type: Regional or neighborhood centers anchored by big box discounters or dominant grocery stores; freestanding locations in strong retail corridor with easy ingress/egress and ample parking.
- Population: 20,000 to 100,000 within 5 mile radius
- Household income: Med HH income \$27,850 to \$66,840
- Growth Plans: Fill existing and new markets. *Note: Not all stores include growth plans when communicating their site selection criteria. This is an example from Dollar Tree.*



2. Department Stores

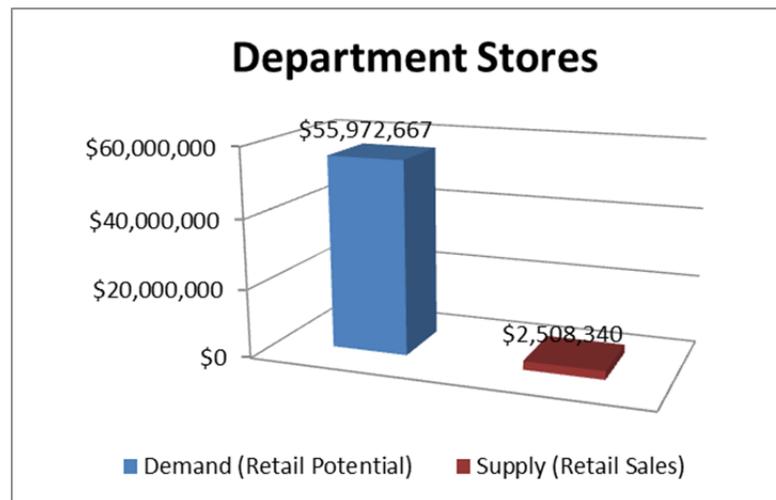
The table below shows the amount of Department Stores **Leakage** in the Trade Area and smaller Trade Area 1a, with only 3 establishments while 107 stores in the City of San Antonio as a whole are experiencing a **Surplus** of sales.

| | Demand | Supply | Leakage/Surplus Retail Gap | | Nbr of Estabs |
|---------------------|---------------|---------------|-------------------------------|---------|------------------|
| Trade Area 1a | \$28,595,947 | \$1,819,927 | \$26,776,020 | Leakage | 2 |
| Trade Area | \$55,972,667 | \$2,508,340 | \$53,464,327 | Leakage | 3 |
| City of San Antonio | \$705,287,174 | \$772,550,287 | (\$67,263,113) | Surplus | 107 |

Requirements for Department Stores

(Belk, Stein Mart)

- Size of store: 30,000 to 67,000 sq. ft.
- Loading: Back door freight delivery accessible by tractor trailers; adjacent full-size compactor pads
- Location type: Prefer locations in power, lifestyle or neighborhood strip centers, regionally accessible shopping areas or free-standing units located in established retail node w/large population of families, strong visibility, convenient access, significant traffic volumes
- Population: 50,000 to 100,000 within 5 mile radius
- Household income: Med HH income \$27,850 to \$66,840
- Growth Plans: Fill existing and new markets (example of growth plans: Dollar Tree)



3. Clothing/Apparel Stores

The table below shows the amount of Apparel Stores Leakage in the Trade Area and smaller Trade Area 1a, with only 35 establishments while 768 Apparel stores in the City of San Antonio as a whole are experiencing a Surplus of sales.

| | Demand | Supply | Leakage/Surplus Retail Gap | | Nbr of Estabs |
|---------------------|---------------|---------------|-------------------------------|---------|------------------|
| Trade Area 1a | \$19,797,792 | \$2,881,043 | \$16,916,749 | Leakage | 16 |
| Trade Area | \$38,760,054 | \$7,722,191 | \$31,037,863 | Leakage | 35 |
| City of San Antonio | \$487,159,651 | \$717,645,189 | (\$230,485,538) | Surplus | 768 |

Requirements for Small Apparel Stores

(Small: *Dress Barn, Old Navy*)

- Size of store: 4,000 to 5,000, minimum 40' frontage
- Location type: Regional and community centers, metro downtown-financial areas, outlet centers.
- Retail synergy: Discount department stores, supermarket, fashion anchor, other soft goods.
- Population: 120,000 within 5 mile radius
- Household income: Med HH income \$61,270

Note: If the requirements of a specific store are shown, the name of that store is in italics.

Requirements for Large Apparel Stores

(Large: Burlington Coat Factory, Ross, *Marshall's*)

- Size of store: 33,000, 150' x 200'
- Site: 1.38+ acres with 116+ parking spaces.
- Loading: Back door freight delivery accessible by tractor trailers.
- Location type: Regional, power and community centers, high traffic volumes.
- Population: 100,000+ within 5-mile radius
- Household income: not specified

Requirements for Women's Apparel Stores

(Bebe, Mothers Work, Talbots, Lane Bryant)

- Size of store: 4,500 to 5,500, minimum 35' frontage
- Location type: Well-anchored soft-goods strip centers w/complement of related women's retail.
- Population: 150,000 in trade area
- Household income: Med HH income \$44,560 to \$56,700

Requirements for Children's Apparel Stores

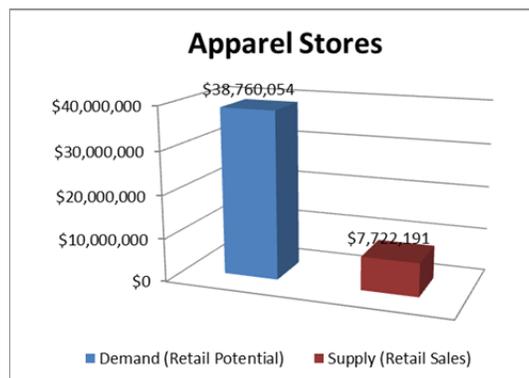
(Gymboree, The Children's Place)

- Size of store: 2,000 to 2,500
- Location type: primarily in dominant regional indoor and outdoor malls – next to other children's apparel retailers a plus.

Requirements for Men's Apparel Stores

(*Casual Male XL, Men's Wearhouse*)

- Size of store: 8,000 square feet
- Location type: Food store-anchored neighborhood center, convenience strip center, freestanding or store front.
- Loading: Rear receiving door with paved delivery area, paved dumpster pad.
- Population: 150,000 in trade area
- Parking: Adequate parking
- Household income: Conveniently located to value-oriented, low-to-middle income customers.



4. Shoe Stores

The table below shows the amount of Shoe Stores Leakage in the Trade Area and smaller Trade Area 1a, with only 4 establishments while 137 stores in the City of San Antonio as a whole are experiencing a Surplus of sales.

| | Demand | Supply | Leakage/Surplus Retail Gap | | Nbr of Estabs |
|---------------------|--------------|---------------|-------------------------------|---------|------------------|
| Trade Area 1a | \$3,348,093 | \$501,983 | \$2,846,110 | Leakage | 1 |
| Trade Area | \$6,536,451 | \$955,766 | \$5,580,685 | Leakage | 4 |
| City of San Antonio | \$82,611,933 | \$110,762,706 | (\$28,150,773) | Surplus | 137 |

Requirements for Shoes & Accessories Stores

(Rack Room, Famous Footwear, *Shoe Show*, Footlocker)

- Size of store: 3,000 to 10,000, min 43' to 67' frontage
- Loading: Back door freight delivery accessible by tractor trailers.
- Location type: Community strip center, downtown, mall, freestanding, neighborhood strip center, outlet center, pad site/outparcel, power center.
- Retail Synergy: Cotenants with national fashion tenants.
- Population: 15,000 within 5 mile radius
- Household income: Upper, middle and lower income.



5. Book, Periodical & Music Stores

The table below shows the amount of Book, Periodical & Music Stores Leakage in the Trade Area and smaller Trade Area 1a, with only 14 establishments while 180 stores in the City of San Antonio as a whole are also experiencing a 10.7% Leakage of sales, probably due to online purchases.

Trade Area Leakage of \$4.6 million is 83% of sales, not all of which is likely to be online. This should leave room for \$2.0 to \$4.0 million in sales for book, periodical and music stores in the Corridor.

| | Demand | Supply | Retail Gap | | Nbr of Estabs |
|---------------------|--------------|--------------|-------------|---------|------------------|
| Trade Area 1a | \$2,842,605 | \$595,629 | \$2,246,976 | Leakage | 9 |
| Trade Area | \$5,501,054 | \$889,724 | \$4,611,330 | Leakage | 14 |
| City of San Antonio | \$68,639,538 | \$61,279,543 | \$7,359,995 | Leakage | 180 |

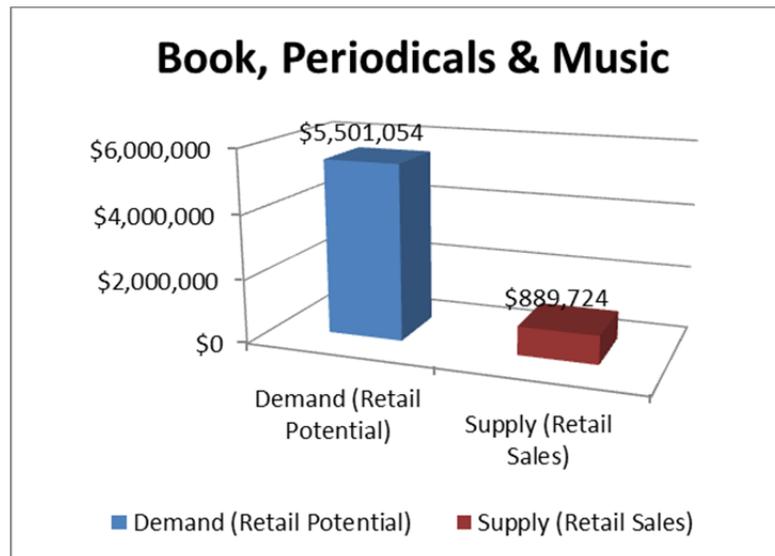
Requirements for Book Stores (Books-A-Million, CD Warehouse)

Books a Million

- Specific Store sites take into account Local Demographics.
- Desirability of available leasing arrangements
- Proximity to their own, and competitors stores
- Overall level of Retail Activity
- Major High Traffic Roads
- Adequate Parking
- Super Stores (8,000 to 39,000sqft)
- Traditional Stores (2,000 to 10,000sqft) usually located in enclosed malls.

CD Warehouse

- Demographic and Local Market
- Population Trends
- Media costs and area Competition
- Real Estate Availability and pricing
- High Traffic strip centers (1000 to 2000 sq.ft. stores)
- Sell quality pre-owned CD's, New Releases also Accept trades, or buy CD's



Recommended Retail Mix

The following table represents the Retail Industry Groups and example Retailers that are recommended to the Steering Committee and the City for recruitment to the Corridor based on Gap Analysis discussed above. In Retail Gap Analysis, the Surplus is good for Corridor merchants because they are selling to consumers well-beyond the Trade Area defined for this Market Study.

However, what's important to this study is the LEAKAGE of sales whereby merchants are not capturing significant amounts of Trade Area Consumer Spending. This leakage shows up in the Retail Gap to varying degrees and the Consultant has identified more than five Industry Groups where there is Significant Leakage that would be attractive to local and national retailers.

Total Leakage of these top five Industry Groups: Discount Stores, Department Stores, Apparel Stores, Shoes & Accessories Stores and Book, Periodical and Music Stores is \$195,014,193. The recommended stores by Industry Group and their estimated sales total to be \$99,836,119, including an estimate for Wal-Mart of \$55,147,500. This represents about ½ the total Leakage, assuming the Corridor will not capture all the Leakage due to strong competition from the Forum and other centers not far away, as well as leakage to internet sales.

In reviewing the Retail Gap analysis for the City of San Antonio, that although there is a net Surplus of sales among City merchants, we noted a leakage of more than \$98 million in 7 Industry Groups. The relevant groups to the Corridor are: "Book, Periodical & Music Stores" (\$7.4 million) and "Other Miscellaneous Store Retailers" (\$8.1 million). We conclude this Leakage is mostly due to internet sales.

| Example Retailers | Industry Group Description | Industry Code | Industry Group | Typ Size Sq Ft (sm) | Assumed Median SqFt | Typ Size SqFt (reg) | Sales/SqFt (lo) Taxable | Taxable Sales Per Store** | Tot Leakage by Industry Group | |
|---|----------------------------|---------------|----------------|---------------------|---------------------|---------------------|-------------------------|-----------------------------------|-------------------------------|---------------------|
| 99 Cents Only | Other Gen. Merchandise | 452910 | 4529 | 16000 | 16000 | 30000 | 159 | \$2,900,160 | | |
| Family Dollar Stores | Other Gen. Merchandise | 452910 | 4529 | 11000 | 11000 | 9500 | 139 | \$1,743,060 | | |
| Wal-Mart Stores | Other Gen. Merchandise | 452910 | 4529 | 102000 | 129000 | 187000 | 375 | \$55,147,500 | | |
| | | | | | | | | Discount Stores Subtotal | \$59,790,720 | \$97,811,648 |
| Belk Inc | Department Stores | 452110 | 4521 | 50000 | 50000 | 80000 | 159 | \$9,063,000 | | |
| Stein Mart | Department Stores | 452110 | 4521 | 37000 | 37000 | 37000 | 178 | \$7,508,040 | | |
| | | | | | | | | Department Stores Subtotal | \$16,571,040 | \$55,972,667 |
| Burlington Coat Factory or Dress Barn | Apparel Stores, General | 448000 | 4480 | 18000 | 18000 | 207000 | 159 | \$3,262,680 | | |
| Old Navy | Apparel Stores, General | 448000 | 4480 | 2750 | 2750 | 8585 | 468 | \$1,467,180 | | |
| Ross, Marshalls or TJ Maxx | Apparel Stores, General | 448000 | 4480 | 20000 | 20000 | 35000 | 418 | \$9,530,400 | | |
| Gymboree | Apparel Stores, Children's | 448130 | 4481 | 1500 | 1500 | 3000 | 529 | \$904,590 | | |
| Casual Male - Big & Tall | Apparel Stores, Men's | 448110 | 4481 | 3300 | 3300 | 3300 | 279 | \$1,049,598 | | |
| Men's Wearhouse | Apparel Stores, Men's | 448110 | 4481 | 5000 | 5000 | 6000 | 279 | \$1,590,300 | | |
| Bebe | Apparel Stores, Women's | 448120 | 4481 | 2200 | 2200 | 3800 | 255 | \$639,540 | | |
| Mothers Work | Apparel Stores, Women's | 448120 | 4481 | 1400 | 1400 | 1600 | 255 | \$406,980 | | |
| Talbots | Apparel Stores, Women's | 448120 | 4481 | 3500 | 3500 | 6500 | 255 | \$1,017,450 | | |
| | | | | | | | | Apparel Stores Subtotal | \$19,868,718 | \$31,037,863 |
| Famous Footwear and/or Naturalizer | Shoes & Accessories Stores | 448210 | 4482 | 1200 | 1200 | 7000 | 265 | \$362,520 | | |
| Foot Locker, Champs Sports or Footaction | Shoes & Accessories Stores | 448210 | 4482 | 1500 | 1500 | 4000 | 176 | \$300,960 | | |
| Rack Room | Shoes & Accessories Stores | 448210 | 4482 | 4250 | 4250 | | 185 | \$896,325 | | |
| | | | | | | | | Shoe Stores Subtotal | \$1,559,805 | \$5,580,685 |
| Books A Million | Book Stores | 451211 | 4512 | 3000 | 3000 | 20000 | 205 | \$701,100 | | |
| CD Warehouse | Music Stores | 451220 | 4512 | 1200 | 1200 | 2500 | 252 | \$344,736 | | |
| | | | | | | | | Book Stores Subtotal | \$1,045,836 | \$4,611,330 |
| Reeds Jewelers | Jewelry Stores | 448310 | 4483 | 500 | 500 | 2100 | 313 | \$178,410 | | |
| Samuels Jewelers | Jewelry Stores | 448310 | 4483 | 577 | 577 | 3690 | 313 | \$205,885 | | |
| Gordons | Jewelry Stores | 448310 | 4483 | 1444 | 1444 | 1666 | 432 | \$711,141 | | |
| | | | | | | | | Jewelry Stores Subtotal | \$1,095,436 | \$2,706,041 |
| TOTAL SALES OF CORRIDOR-RECOMMENDED STORES WITH WALMART INCLUDED | | | | | | | | \$99,931,555 | \$197,720,234 | |

Projected Retail Profile

In an exercise intended to create a scenario for five years out, a Retail Profile was projected for 2018 using ESRI projections of population, households and median disposable income. Population and household growth are modest, but with the addition of recommended retail stores, the Supply (Retail Sales) would be \$1.2 bn, an increase of 23% over five years. There would still be a retail gap of \$61.3 million Leakage, but the Trade Area economy would be robust.

Projected Retail Profile: 2018

| | | TRADE AREA Demographics | | | 2013 | TRADE AREA Demographics | | | 2018 |
|---|-----------|-------------------------------|-----------------------|-----------------|---------------|-------------------------------------|---------------------------------|----------------------|--------------------|
| | | 2013 Population | | | 94,392 | 2018 Population | | | 100,480 |
| | | 2013 Households | | | 37,269 | 2018 Households | | | 39,782 |
| | | 2013 Median Disposable Income | | | \$43,094 | 2018 Median Disposable Income | | | \$53,050 |
| Industry Summary | NAICS | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap | Nbr of Estabs | Projected Demand (Retail Potential) | Projected Supply (Retail Sales) | Projected Retail Gap | Proj Nbr of Estabs |
| Total Retail Trade and Food & Drink | 44-45,722 | \$955,479,212 | \$970,083,980 | (\$14,604,768) | 804 | \$1,255,534,633 | \$1,194,202,328 | \$61,332,304 | 990 |
| Total Retail Trade | 44-45 | \$859,069,324 | \$866,705,559 | (\$7,636,235) | 690 | \$1,128,848,513 | \$1,066,940,407 | \$61,908,106 | 849 |
| Total Food & Drink | 722 | \$96,409,887 | \$103,378,421 | (\$6,968,533) | 114 | \$126,686,118 | \$127,261,921 | (\$575,803) | 140 |
| Industry Group | | | | | | | | | |
| Motor Vehicle & Parts Dealers | 441 | \$168,062,887 | \$101,403,473 | \$66,659,414 | 68 | \$220,840,781 | \$124,830,701 | \$96,010,079 | 84 |
| Furniture & Home Furnishings Stores | 442 | \$19,979,063 | \$27,192,097 | (\$7,213,035) | 53 | \$26,253,220 | \$33,474,283 | (\$7,221,063) | 65 |
| Electronics & Appliance Stores | 4431 | \$25,176,981 | \$18,262,277 | \$6,914,704 | 38 | \$33,083,474 | \$22,481,408 | \$10,602,066 | 47 |
| Bldg Materials, Garden Equip. & Supply Stores | 444 | \$26,818,030 | \$54,333,606 | (\$27,515,576) | 49 | \$35,239,872 | \$66,886,290 | (\$31,646,418) | 60 |
| Food & Beverage Stores | 445 | \$152,860,598 | \$160,877,502 | (\$8,016,904) | 72 | \$200,864,417 | \$198,045,006 | \$2,819,411 | 89 |
| Health & Personal Care Stores | 4,464,461 | \$64,106,215 | \$122,139,027 | (\$58,032,812) | 38 | \$84,237,911 | \$150,356,787 | (\$66,118,876) | 47 |
| Gasoline Stations | 4,474,471 | \$100,684,198 | \$283,365,370 | (\$182,681,172) | 14 | \$132,302,719 | \$348,831,227 | (\$216,528,508) | 17 |
| Clothing & Clothing Accessories Stores | 448 | \$53,189,543 | \$13,864,954 | \$39,324,589 | 66 | \$69,893,005 | \$44,772,642 | \$25,120,363 | 81 |
| Clothing Stores | 4481 | \$38,760,054 | \$7,722,191 | \$31,037,863 | 35 | \$50,932,129 | \$33,944,771 | \$16,987,358 | 43 |
| Shoe Stores | 4482 | \$6,536,451 | \$955,766 | \$5,580,685 | 4 | \$8,589,136 | \$3,095,137 | \$5,493,999 | 5 |
| Jewelry, Luggage & Leather Goods Stores | 4483 | \$7,893,038 | \$5,186,997 | \$2,706,041 | 27 | \$10,371,741 | \$7,732,735 | \$2,639,006 | 33 |
| Sporting Goods, Hobby, Book & Music Stores | 451 | \$22,243,666 | \$22,249,765 | (\$6,099) | 52 | \$29,228,991 | \$28,676,503 | \$552,488 | 64 |
| Book, Periodical & Music Stores | 4512 | \$5,501,054 | \$889,724 | \$4,611,330 | 14 | \$7,228,586 | \$2,381,655 | \$4,846,931 | 17 |
| General Merchandise Stores | 452 | \$153,784,315 | \$5,261,241 | \$148,523,073 | 9 | \$202,078,215 | \$94,690,549 | \$107,387,666 | 11 |
| Other General Merchandise Stores | 4529 | \$97,811,648 | \$2,752,901 | \$95,058,747 | 6 | \$128,528,083 | \$76,931,489 | \$51,596,594 | 7 |
| Miscellaneous Store Retailers | 453 | \$23,111,401 | \$31,458,420 | (\$8,347,019) | 185 | \$30,369,226 | \$38,726,254 | (\$8,357,028) | 228 |
| Nonstore Retailers | 454 | \$49,052,427 | \$26,297,827 | \$22,754,601 | 48 | \$64,456,683 | \$32,373,410 | \$32,083,273 | 59 |
| Food Services & Drinking Places | 722 | \$96,409,887 | \$103,378,421 | (\$6,968,533) | 114 | \$126,686,118 | \$127,261,921 | (\$575,803) | 140 |
| Limited-Service Eating Places | 7222 | \$49,395,513 | \$39,931,762 | \$9,463,752 | 36 | \$64,907,511 | \$49,157,191 | \$15,750,320 | 44 |

A word of caution here: some of this 2018 Scenario of retail sales will be achieved in spite of what the City does. The degree of success in achieving these retail sales will depend on the level of commitment and resolve by the City and the local merchants and owners of other businesses.

It will not be enough for the City to do all it can, local merchants and owners of land and other businesses will need to organize and act together to take care of regular maintenance and to conduct marketing and promotions in behalf of all. There should be two such organizations to meet the different needs of the Retail Segment and the Mixed-Use Segment of the Corridor.

Non-Retail Businesses

The Northeast Corridor is an interesting mix of retail and non-retail businesses and land uses. Though dominated by retail establishments with 338 of 395 designated parcels and spaces, there are 181 Non-Retail businesses and 10 residential uses out of 210 designated parcels and spaces. Retail uses are typically designated as a use that might be found in a retail center.

Non-Retail uses are typically those not found in retail centers. However, some non-retail uses do appear in centers because of their versatility, ability to pay higher rents and their low impact on adjacent uses. Many non-retailers will be part of an industrial park or free-standing operation because of the need for less parking, less air-conditioned space, loading docks and other factors. Light Industrial-related uses such as office-showroom, office-warehouse and “flex-space” typically budget for lower rents and cannot justify the rent of a retail center.

Existing Non-Retail Businesses

- Apartments, condominiums (6)
- Child care and pre-schools (8)
- Churches (6)
- Cleaners, laundry (7)
- Consumer loans, payday loans and check cashing (14)
- Copying, printing (6)
- Construction related (9)
- Event centers (5)
- Financial Services - banks, credit unions (6)
- Fitness and martial arts (9)
- Funeral home (1)
- Government offices (5)
- Lodging - corporate and long-term (4)
- Medical Services (clinics, labs, physicians, surgeons, psychologists, mental health, psychotherapists, dentists) (30)
- Moving companies (4)
- Pet care (3)
- Professional Services (attorneys, tax prep, real estate, insurance, environmental, security, investigations, web design, marketing, advertising) (49)
- Social services - adoption, abortion, senior (4)
- Storage (5)
- Tattoo artists (6)
- Ungrouped non-retail (18)

Inventory Summary of Land and Building Space

The list above indicates the character of 200 non-retail businesses in the NEC. In land use, the dominant category is residential, while Professional and Medical services have the highest number of establishments with 79.

There is an estimated total of 1,311,735 square feet of **Non-Retail space** in the Northeast Corridor, of which 114,590 square feet are vacant, resulting in a Non-Retail space vacancy rate of 8.7%.

There are 212.77 acres considered to be in Non-Retail use. Another 106.85 acres and 83,769 sq. ft. of building floor space that could be either non-retail or retail uses.

The overall vacancy rate for all building space within the Corridor is 13.5%.

**Inventory Summary of Land and Building Space
for Separate Nacogdoches and Perrin Beitel Segments**

| Parcel Use | Nbr | Land Area | Available Space | Building Area | Occ Rate | Vac Rate |
|---|------------|---------------|-----------------|------------------|--------------|--------------|
| <u>Nacogdoches Retail Segment</u> | | | | | | |
| Retail Total | 298 | 163.55 | 186,669 | 1,259,165 | 85.2% | 14.8% |
| Residential Total | 4 | 8.28 | n/a | n/a | n/a | n/a |
| Non-Retail Total | 130 | 93.55 | 96,084 | 771,986 | 87.6% | 12.4% |
| Any Use | 24 | 22.60 | 4,978 | 4,978 | 0.0% | 100.0% |
| Retail Corridor Total | 456 | 287.98 | 287,731 | 2,036,129 | 85.9% | 14.1% |
| <u>Perrin Beitel Mixed Use Segment</u> | | | | | | |
| Retail Total | 97 | 44.42 | 23,603 | 371,922 | 93.7% | 6.3% |
| Residential Total | 6 | 27.83 | n/a | n/a | n/a | n/a |
| Non-Retail Total | 70 | 119.22 | 18,506 | 539,749 | 96.6% | 3.4% |
| Any Use | 26 | 84.25 | 78,791 | 78,791 | 0.0% | 100.0% |
| Mixed Use Corridor Total | 199 | 275.72 | 120,900 | 990,462 | 87.8% | 12.2% |
| <u>NORTHEAST CORRIDOR</u> | | | | | | |
| Retail Total | 395 | 207.97 | 210,272 | 1,631,087 | 87.1% | 12.9% |
| Residential Total | 10 | 36.11 | n/a | n/a | n/a | n/a |
| Non-Retail Total | 200 | 212.77 | 114,590 | 1,311,735 | 91.3% | 8.7% |
| Any Use | 50 | 106.85 | 83,769 | 83,769 | 0.0% | 100.0% |
| Northeast Corridor Total | 655 | 563.70 | 408,631 | 3,026,591 | 86.5% | 13.5% |
| Note: Available space and building area totals do not include residential floor space, land area is included. | | | | | | |

After studying the Northeast Corridor, photographing, walking, driving, reviewing data, creating files and tables, creating maps and graphics, interviewing Steering committee members, neighborhood association members, business owners, real estate brokers and others, Consultant recommends the Corridor become two Segments for planning, marketing, guidelines and operations.

One segment, with a **Retail Focus** (called the Nacogdoches Retail Segment) is recommended for those parcels that lie to the north of Wye Dr. and include the portion of Perrin Beitel north of there, Old Perrin Beitel, Naco Perrin, Thousand Oaks, Nacogdoches and O'Connor Rd and all addresses on side streets along Nacogdoches.

The other segment should focus on **Mixed Uses** (called Perrin Beitel Mixed Use Segment) and is recommended on Perrin Beitel from NE Loop 410 to Wye Dr. and includes all address on side streets along Perrin Beitel.

The **Nacogdoches Retail Segment** includes 456 establishments, covers 287.9 acres, has 287,731 sq. ft. of vacant available floor space and total building area of 2,036,129 sq. ft. With 51% of the land in the Northeast Corridor, more than 77% of retail space and more than 67% of total building space are in the Retail Segment.

The **Perrin Beitel Mixed Use Segment** includes 199 establishments, covers 275.72 acres, has 120,900 sq. ft. of vacant available space out of a total building area of 990,462 square feet. Only 41% of non-retail space is within the Mixed Use Segment, but 94% of “Any Use” floor space or multiple use space is within the Segment. Most of the Residential uses are currently in the Mixed Use Segment with 6 of the properties and 27.83 acres of residential, or 77% of the residential land.

Conclusion

It is clear that the Nacogdoches Retail Segment dominates the Corridor’s Retail floor space as well as total building space with only 51% of the land. The Perrin Beitel Mixed Use Segment has the most vacant land for any use and land for residential as well as existing residential uses. Because of these differences and the length of the Corridor, the concept of providing different themes has merit for planning, developing, regulating and marketing purposes.

Vacant Land & Improvements for Sale or Lease in the **RETAIL** (Nacogdoches) Segment

Differentiating from either vacant land or vacant space, there is an estimated 32.5 acres of Land within the Northeast Corridor, and 185,453 sq.ft. of building space. There are 10.65 acres of land and 13,185 sq.ft. of building space which could be used for *either* Retail or Non-Retail uses.

Another 13.85 acres of land associated with 87,492 sq.ft. of improvements are likely to be for Non-Retail uses. This includes 67,546 sq. ft. at 13526 Nacogdoches that has been a call center, a billing center **and** a technical or trade school.

Vacant Land & Improvements for Sale or Lease

| Corridor Segment | Type | Land Area Avail Lease | |
|--------------------------------|-------|-----------------------|----------------|
| | | (ac) | Space |
| Retail (Nacogdoches) | Vac | 0.14 | 1,498 |
| Retail (Nacogdoches) | Vac-N | 7.46 | 82,684 |
| Retail (Nacogdoches) | Vac-R | 8.01 | 84,776 |
| Total Retail Segment | | 15.60 | 168,958 |
| Mixed (Perrin-Beitel) | Vac | 14.25 | 57,487 |
| Mixed (Perrin-Beitel) | Vac-N | 6.81 | 11,206 |
| Total Mixed Use Segment | | 21.05 | 68,693 |

Note: “Type” in this table represents a probable use for vacant property. Vac = Any Use; Vac-N = Non-Retail; Vac-R = Retail

Land for Sale OR Lease comprises most of the 103.96 acres of Vacant Land within the Northeast Corridor. There are 69.26 acres that could be used for Retail **or** Non-Retail purposes and another 32.51 acres of land is associated with free-standing improvements totaling 179,371 sq. ft., almost half of which (84,776 sq. ft.) are intended for Retail uses. Of the 563.7 total acres, this means 18.4% of the land is vacant.

Vacant Land for Sale or Lease

| Corridor Segment | Type | Land Area (ac) |
|--|-------|----------------|
| Retail (Nacogdoches) | Vac | 21 |
| Retail (Nacogdoches) | Vac-N | 0.93 |
| Total Vacant in Retail Segment | | 22.28 |
| Mixed (Perrin-Beitel) | Vac | 70 |
| Mixed (Perrin-Beitel) | Vac-N | 1.67 |
| Mixed (Perrin-Beitel) | Vac-R | 0.52 |
| Total Vacant in Mixed Use Segment | | 72.19 |

Note: "Type" in this table represents a probable use for vacant property. Vac = Any Use; Vac-N = Non-Retail; Vac-R = Retail

Vacant Land for Sale or Lease in the **RETAIL (Nacogdoches) Segment**

There is an estimated 22.28 acres of Vacant of Land in the **RETAIL** Segment of the Northeast Corridor that could be used for either Retail or Non-Retail purposes ranging between 0.15 and 2.68 acres. This land can be used for almost any purpose

Vacant Land for Sale or Lease in the **MIXED USE (Perrin Beitel) Segment**

Within the **MIXED USE** Segment, there is an estimated 72.19 acres of vacant land within the Northeast Corridor, ranging between 0.31 and 20.43 acres. Although any use could probably be made of these properties, there are two that most likely become non-retail uses.

Vacant Land & Improvements for Sale or Lease in the **RETAIL (Nacogdoches) Segment**

The combination of vacant land with improvements provides an opportunity for entrepreneurs to own their own building. In the Retail Segment, there are 168,958 sq. ft. of building area on 15.8 acres. A large portion of these properties is the former Alliance Data Processing Services with 67,546 sq. ft. of building and 5.5 acres of land at 13526 Nacogdoches Road. This property would be suitable for a call center, a community college, a technical school or a trade school and is being marketed as a call center or trade school by the listing broker.

Only 0.14 acres and 1,498 sq. ft. of building that Consultant did not designate as retail or non-retail in the vacant land with improvements inventory of the Retail Segment. This inventory also includes 84,776 sq. ft. of building on 8.02 acres of land likely to become retail uses.

Vacant Land & Improvements for Sale or Lease in the **MIXED USE (Perrin Beitel) Segment**

Within the Mixed Use Segment along Perrin Beitel, there are 68,693 sq. ft. of building space on 21.05 acres of land. More than half the total building space in the Mixed Use Segment is a former Lack's furniture store which is now vacant. The property also includes 4.89 acres of land. The former Lack's is also being marketed by the listing broker as a call center or trade school. Of the total 21.05 acres, 6.81 acres and 11,206 sq. ft. of building is likely to be for non-retail use, leaving the balance of 14.24 acres and 77,487 sq. ft. of building for any type of use, undesignated by the property or its location.

Vacant Building Space for Lease in the **RETAIL (Nacogdoches) Segment**

The table above represents the current (October 2013) inventory of vacant available lease space in the **Retail Segment** of the Corridor. This segment includes a total of 108,497 sq. ft. of space ranging in size from 500 to 12,010 sq. ft. Three of the spaces totaling 3,480 sq. ft. are not designated whether they are for retail or non-retail use. Four spaces totaling 7,400 are primarily for non-retail uses and the rest have been designated for retail uses.

Vacant Building Space for Lease in the **MIXED USE** (Perrin Beitel) Segment

The table below represents the current (October 2013) inventory of vacant available lease space in the **Mixed Use Segment** of the Corridor. This segment includes a total of only 17,128 sq. ft. of space ranging in size from 300 to 4,000 sq. ft. Three of the spaces totaling 7,500 sq. ft. are not designated as to whether they are for retail or non-retail use. Five spaces totaling 7,300 are primarily for non-retail uses and the rest are designated for retail uses.

Vacant Building Space for Lease **MULTI-PURPOSE/NON-RETAIL**

There is an estimated 74,572 sq.ft. of Vacant multi-purpose floor space within the Northeast Corridor, that could be used for either Retail or Non-Retail purposes, including the **63,292 sq.ft. former Lack's Furniture Store** space at 8611 Perrin Beitel. This space is recommended for either a Call Center or a Tech/Trade School.

Another 22,498 sq.ft. of space is available in the Corridor, ranging from 500 sq.ft. to 4,000 sq.ft. associated with Non-Retail uses (mostly office).

Conclusions on Inventory

Overall within the Corridor, there is an inventory of vacant land with improvements that includes 237,651 sq. ft. of building space situated on a total of 36.66 acres of land.

Non-Retail Markets in San Antonio

In leading up to a set of non-retail uses to be recommended for the NEC, each of the real estate markets is reviewed based on surveys conducted for year by REOC Partners, a commercial real estate firm and specific research directed toward the call center industry and the technical/trade school industry.

- Industrial
 - Call Center Industry
 - Tech/Trade School Industry
- Medical Office
- Office
- Apartments

San Antonio's Industrial Market

In the SA market for Industrial space, *vacancy rates are trending downward (a good thing), Net absorption and asking rents are trending upward*, but construction is neither up nor down.

The city vacancy rate was 8.1% overall as of June 2013 and trending downward as positive net absorption was 850,000 square feet for 1st & 2nd Quarters, an average of 142,000 square feet per month. Service Center/Flex space in the City is 13.4% vacant with positive net absorption of 291,117 sq. ft.

Overall, 291,117 sq. ft. (48,500 sq. ft./month) of Service Center/Flex space was absorbed through June 2013 with 52,937 sq. ft. absorbed in REOC San Antonio's Northeast Sector. Vacancy in the NE Sector is 14.1%. Construction was recently completed in the Northeast Corridor Trade Area at Thousand Oaks Business Park 3 near Wetmore Rd on 66,170 sq. ft. of speculative Showroom/Warehouse space.

The Northeast Corridor is not suitable for Distribution Warehouse space, and tends to be a better market for Service Center/Flex space. However, the current market and near future do not favor the Corridor for demand of this type of space.

Call Centers Industry

Call Centers are a way for businesses to outsource their customer service, although not all companies do. An inbound call center is operated by a company to communicate product support or to field other inquiries with consumers. Outbound call centers are used for telemarketing, market research, fundraising and debt collection. A Call Center is usually a large open workspace with workstations for each employee to have a computer and a telephone.

Trends: answering emails and calls; social media, mobile apps, video calling require more personalization. The recession over the past 5 years has slowed the growth of the call center industry and some major companies have relocated their call centers overseas.

Call center . . . “work flows can be routed to different geographic locations, organizations or employees within the same organization and has allowed companies to shift service delivery from local interactions to more remote ones.” An estimated 30% of call centers serve local markets, with 56% serving their own national market. Call center agents typically earn between \$25,000 and \$29,000 annually with managers typically earning \$49,500 to 60,000 annually. Centers are operated by 22,647 businesses, employ 475,275 persons and generate \$18bn of revenue;

The Call Center industry is expected to grow by 10% annually through 2017.

Recently, Ibex Global Solutions will open a Call-Center at the former Scooter Store site in New Braunfels and the City will spend \$450,000 for generator and electrical equipment to ensure no power loss. New Braunfels Industrial Development Corp. will retain ownership of the Generator and Electrical Equipment. Ibex Global will hire AT LEAST 600 people by the end of 2014. However, the current plan is to have 250-300 employees by end of 2013, 600-800 by end of 2014, and 1000 by end of 2015. Incentives for Ibex include 3 payments of \$200,000 by the City if Ibex keeps payroll above 600 employees in 2014, 2015 and 2016. *San Antonio Express News, October 9, 2013.*

Technical and Trade School Industry

Enrollment in technical and trade schools typically increases when there is high unemployment as people go to school for more training. Recent growth during the last recession will continue for at least the next 5 years. The Technical and Trade School industry generates revenue of \$16bn annually with low capital outlay.

According to Sageworks, annual growth in employment in professional skills and performance training in the technical and trade school industry is expected to be 4.7% annually through 2016. The net pre-tax profit for technical and trade schools in 2010 was 10.66%, and industry sales grew by 8% in 2009 and 15% in 2010.

According to IBIS World, estimated annual growth from 2008 to 2011 averaged 6.2% and annual growth is projected to be 5.3% through 2016.

San Antonio's Medical Office Market

In the SA market for Medical Office space, *vacancy rates are trending downward, Net absorption, construction and asking rents are trending upward.* The city vacancy rate is 16.8% overall as of June 2013 compared to 19% last year. There was positive net absorption of 201,400 square feet for 1st & 2nd Quarters, an average of 33,600 square feet per month.

Overall, -7,856 sq. ft. of Class C Medical Office space was absorbed through June 2013 with -438 sq. ft. absorbed in the Northeast Sector which is much larger than the Corridor or Trade Area. Vacancy in the NE Sector is 40.6% for Class C space and 23.5% for all Medical Office space in the NE.

Construction is underway for Baptist Emergency Hospital office building in the NE at I-35 and Schertz Parkway. However, most of the 325,000 sq. ft. of other space under construction in the City is in the Far North, Northwest, Far West and New Braunfels.

The Northeast Corridor is a location where most medical office space is Class C. Generally, the current market for Medical Office space and near future do not favor the Corridor for demand of this type of space.

San Antonio's Office Market

In the SA market for Office space, *vacancy rates are trending downward, Net absorption and asking rents are trending upward*, but construction activity is neither up nor down. The city occupancy rate for office space is 18.6% overall as of June 2013 compared to 21.3% last year. There was positive net absorption of 376,051 sq. ft. for 1st & 2nd Quarters, an average of 62,675 square feet per month.

Overall, -13,301 sq. ft. of Class C Office space was absorbed through June 2013 with a positive 5,726 sq. ft. absorbed in the Northeast Sector. Vacancy in the NE Sector is 16.4% for Class C space and 13.4% for all Office space in the NE. *Most Office space in the Northeast Corridor is Class C which is older buildings in secondary locations with very few amenities.*

The current market for Office Space and that of the near future are not favorable for the Corridor with demand for this type of space.

San Antonio's Apartment Market

In the SA market for Apartments, *vacancy rates are trending downward (a good thing), asking rents, construction activity and Net absorption are all trending upward*. The city occupancy rate for Apartments 92.9% overall as of September 2013 compared to 92.6% last year. This occupancy rate is the highest in more than a decade. There was positive net absorption of 3,747 units for first *three* quarters of 2013, compared to 4,931 in *four* quarters of 2012.

As rental rates and absorption increase, developers are inclined to build more apartments. The average rental rate for new apartments in 2013 is \$0.95/sq. ft. up from \$0.92 in 2012 and \$0.88 in 2011. Most apartments in the Northeast Corridor are Class B or C which are older complexes in secondary locations.

There are several projects in the pipeline, 3 of which are inside Loop 410 and one "on hold" project on Perrin Beitel, but no construction is underway in the Northeast Sector.

Current positive trends in the apartment market are favorable to the Corridor with demand for more housing all over.

Potential Non-Retail Users/Tenants

- Apartments for persons under 35 years old (Millennials)
- Call center
- Community college
- Trade School (barber, technical, bartending, lab, medical, dental, driving, other)
- Data center
- Financial institutions
- Health/medical services
- Fitness center
- VIA bus information/transfer station.

Potential Office Space Users/Tenants

- Professional Offices (law, accounting, architecture, landscape architecture, interior design, engineering, advertising, graphic arts, crafts,
- Medical & dental,
- Financial advisors, insurance, real estate,
- Computer & internet consultants,
- Governmental office,
- Consultants in all fields,
- Art gallery & museum, counselors,
- Charitable organizations,
- Social services,
- Market research,
- Business & trade organizations.

Recommended Non-Retail Users

Based on our review of the real estate markets and the specific submarkets for call centers and technical/trade schools, the first three of the non-retail uses shown below are recommended:

- Apartments, rental
- Call Center
- Community College/Trade School
- Medical Clinic
- Financial Institution

Consultant is charged with recommending up to three Non-Retail Users for possible recruitment to locate in the Corridor. The recommendations are Apartments for Millennials (under 35 years), Call Center and a campus/center for a community college or Trade School. Following are criteria/requirements that apply to these proposed non-retail users and suggested locations for each type of use.

Requirements for apartments

- Land: 7+ acres
- Zoning: MF33, MF40 or MF50 (or allow 50 units/acre and 4 stories)
- Frontage on Major thoroughfare
- Available public transportation
- Retail amenities and entertainment nearby
- Cost effective rental market
- Proximity to job centers
- Strong renter demand from workers in service jobs
- Limited multifamily supply
- Ongoing redevelopment efforts

Apartment Opportunities

The Corridor and its Trade Area are expected to experience growth up to 2,500 households over the next 5 years. Single family housing units will probably not fulfill this need because of the lack of available land within the Trade Area. There is vacant and under-used land within the corridor and those who believe there is excessive zoning for retail use, as well as too much retail space. Following are opportunities for adding between 2,000 and 2,500 units.

- A. Properties (4) associated with the vacant Perrin Oaks Plaza at 11823 Perrin Beitel, and 2 properties of the former Bank of America at 11714 Perrin Beitel, requiring acquisition and demolition. This is a total of 9.3 acres.
- B. Property owned by NEISD: 22.1 acres of vacant land for acquisition (all or part) between Post Office Dr and east bound Wurzbach Pkwy east of Perrin Beitel;
- C. Property east of Perrin Beitel, an 18.46-acre vacant land triangle for acquisition between Schertz Rd and west bound Wurzbach Pkwy access road. This property is adjacent to the former Longhorn Quarry;
- D. The former Perrin Estate with frontage on Swan’s Landing near Perrin Beitel - Consider multifamily on the Perrin Estate and townhouse-style units on the vacant frontage of Swan’s Landing, an estimated total of 10 acres;
- E. Properties at 4310 Naco Perrin and the 4400 block of Naco Perrin on the west side of the street - Encourage townhouse-style quad-plexes or similar rentals on 3.31 acres (2.25+ 1.06) of vacant land east of Perrin-Beitel;
- F. Properties 11003 and 11011 Perrin Beitel which include the RV storage and used car dealer on a total of 7.49 acres.

Opportunities for Apartments: A



This view shows Perrin Oaks Plaza vacant shopping center on the west side of Perrin Beitel and the former Bank of America branch bank with drive through lanes on the east side of Perrin Beitel. We are told the shopping center is sinking and also that there is a spring underneath the slab somewhere. This property was cited by most respondents to the survey questionnaire as an obstacle to redevelopment. Real estate brokers said that no national retailer would locate in the corridor after driving by the property.

11823 Perrin Beitel – Perrin Oaks Plaza Shopping Center (vacant, abandoned)



11714 Perrin Beitel – Former Bank of America branch bank with drive through lanes (vacant)



The bank property across Perrin Beitel is for lease only, and is restricted to uses that are not financial. With very few possible uses because of the existing building and drive through lanes, this property has very limited marketability.

Together, the two properties could become the location of at least 350 higher density apartments (4-story) that offer the amenities and rents that appeal to Millennials and their probable income group. In addition, it is a short walk from Thousand Oaks, which is the center of retail activity within the Corridor.

Opportunity for Apartments: B



This 20.43-acre parcel, owned by North East ISD is located between eastbound Wurzbach Parkway and Post Office Rd in the Mixed Use Segment of the Corridor. All or part of this parcel could be developed for apartments. At the west end of the property is a smaller parcel not included in the 20 acres that might also be available.

Opportunity for Apartments: C



Opportunity C for apartments is an 18.46 acre tract on Schertz Road at the west end of the Longhorn Quarry which also has frontage along Wurzbach Parkway westbound access road. Primary access to the property would be from Schertz Road.

Opportunity for Apartments: D



Apartment opportunity D is not entirely within the Corridor boundary. It includes the historical Perrin Estate of 6+ acres, frontage along Swans Landing and undeveloped land at the rear property lines of residential lots in Village North II subdivision. The idea is to add market rate multifamily housing, which might include apartments or townhomes developed around the historic estate and possibly townhome-style units along the Swan’s Landing frontage.

Opportunity for Apartments: E



This potential apartment project includes 2 parcels on Naco Perrin east of Perrin Beitel. The north parcel is a 1.06 acre lot abutting duplexes, commercial and single family residential. The south parcel is 2.25 acres behind

commercial uses and across the street from a duplex project. Here is an infill opportunity for townhouse-style multifamily rental units within walking distance of shopping and adding households to the consumer market. As San Antonio and the North East area continue to grow, infill parcels such as these will be in demand for apartments much like the infill demand by new home builders for infill tracts for single family construction.



Above is a view of the 2.25 acre tract looking north west toward Northern Hills from the corner of Naco Perrin and Center Point. With the slope, the units would naturally be stepped down toward the Vespero shopping center.

Opportunity for Apartments: F



These parcels are currently under-used for RV storage and a small used car operation. This property includes property numbers 73 (0.86 acres) and 135 (6.63) acres for a total of 7.49 acres. There are no single family residential neighborhoods abutting this property.

Located on Perrin Beitel south of Wye Dr. in the Mixed Use Segment of the Corridor, this parcel could be developed for apartments with very little impact on any residential neighborhood.



Requirements for a Call Center

- Building size: 10,000 to 200,000 sf based on number of employees of 7 to 12 per 1000 sf
- Parking ratio: 7/1000 sf to 12/1000 sf
- Redundant telephone lines and electric power minimums
- Household income below average,
- Smaller city or rural area,
- Socio-economic index lower than average,
- Relatively high unemployment,
- Below average number of college graduates,
- High density of retail stores,
- Above average percent of workers age 20-30,
- Below average percent of workers age 40-50,
- Few call centers in the area.

Potential Call Center OR Trade School Locations 13526 Nacogdoches



Above is one of two possible locations for a call center. This site was originally a billing center for J.C. Penney and later was used as a call center and Alliance Data Processing. The building is hidden by mature trees and is currently vacant. It is being marketed by the broker for a call center or a tech/trade school. The building is 67,546 sq. ft. and should accommodate a mid-sized call center of between 300 and 350 employees or agents.

In addition to the property at 13526 Nacogdoches, there is a possible site for a small call center at 8531 Perrin Beitel. This space is at the north end of a shopping center and additional parking would be needed if it became a call center. However, there is additional land to the rear (west) of the building that could accommodate more parking. This building is approximately 47,000 sq. ft. could accommodate a small call center of between 200 and 250 employees or agents.

8515-8531 Perrin-Betel

Retail Center formerly anchored by Lacks Furniture



8515-8531 Perrin Beitel (former Lacks Furniture)

Requirements for a Community College or Tech/Trade School

- Located based on demographics of target audience;
- Access to public transportation;
- Adequate parking;
- Constructability of area – remediation, topography, etc.
- Multiple or Single Property Ownership in area;
- Opportunity for building re-use;
- Compatible Zoning along with the cost and availability of land or floor space in the area;
- Capability for Expansion;
- Catalytic economic impact on surrounding area;
- Availability of Community Partnerships.

Examples: Alpha and Omega, Career Point, Hallmark College, business, massage therapy, health care, graphic design, automotive, HVAC, electrical, plumbing, construction trades.

There are also two potential locations for a community college, technical or trade school in the Corridor. Both buildings are mentioned above with regard to a call center. The location at 13526 Nacogdoches with 67,546 sq. ft. could provide space for 450 to 750 students. The former Lack's furniture store with 47,000 sq. ft. could provide space for 350 to 500 students. This building has never been used for anything but furniture retail and would need to be remodeled and properly equipped.

Steps to Improve Competitive Position of the Corridor

IMPLEMENTATION

A major part of research conducted by the Consultant was a survey questionnaire administered to more than 100 stakeholders in the NEC. This survey was for receiving input and information from persons in the Trade Area Neighborhoods; owners, managers and employees of existing businesses; owners, managers and real estate brokers representing vacant building space and vacant land. The City of San Antonio Department of Planning and Community Development sent letters of introduction to 190 stakeholders and Consultant contacted another 50 stakeholders in order to reach the 100 minimum of completed surveys. Survey questionnaires were compiled manually and summarized according to category (neighborhood, business or vacant property) and by question. A more detailed description of the surveys and copies of the questions are available in the Appendix. Answers were selected from this summary to be included as “From survey interviews” in several of the sections below.

Obstacles to Development/Redevelopment

From survey interviews

- Owner asking price and for lease only key properties
- Attitude of status quo
- Lack of cooperation among business owners, landlords, land owners and neighborhood associations;
- Presence of homeless (perceived by most)
- Continuing decline and deterioration of the area;
- Perrin Oaks Plaza – the fenced, “sinking brown building.”
- Too many permits & inspections overwhelm most business owners
- Lack of support by lenders
- Level of commitment by the City to redevelopment



Perrin Oaks Plaza Shopping Center (vacant, abandoned)

From “Regenerating Older Suburbs”

Obstacles to redevelopment:

- Time and cost in obtaining approvals
- Environmental uncertainties
- “Not in My Back Yard” (NIMBY) reactions
- Infrastructure limitations (improvements coordinated with private development)
- Political uncertainty (city can influence perception by developers, being more friendly toward proposals)
- Financial risk (public financing, lack of private debt and private equity)

Consultant

- Owner asking price and for lease only key properties
- Perrin Oaks Plaza – the fenced, “sinking brown building.”
- Unwillingness of owners/landlords to tolerate “dark space;”
- Time and cost in obtaining approvals to code;
- NIMBY reactions (VIA Transit Station and multifamily);
- Political uncertainty (city can influence the developers’ perception by being friendly toward proposals);
- Consumer confidence in Corridor businesses;

- Lack of appropriate space/location for selected retailers;

Conditions that Hamper Redevelopment

From survey interviews

- Lack of trust or loyalty between business owners and neighbors;
- Lack of consistent, passionate leadership within the business community;
- Lack of design standards, appearance of corridor;
- Lack of maintenance (buildings, public areas, vacant lots);
- Crime (arson, graffiti, theft, robbery);
- Former bank property is for lease only and is restricted to non-financial uses;
- No incentive for owners/landlords to plan for the long-term – rent to marginal tenants now to avoid maintaining “dark” space for better tenants later;
- Almost epidemic levels of disrepair among Corridor commercial properties;
- Current reputation of the Corridor as unsafe, unkempt and deteriorating;

Consultant

- Lack of consistent, passionate leadership within the Corridor Business Community;
- Lack of design standards, appearance of corridor;
- Lack of maintenance (buildings, public areas, vacant lots);
- Crime (arson, graffiti, theft, robbery);
- Former bank property is for lease only and restricted to non-financial uses;
- No incentive for owners and landlords to plan for the long-term – rent to marginal tenants now to avoid maintaining “dark” space for better tenants later;
- Projected increases in long-term interest rates and anticipated reluctance of lenders to finance multifamily projects;
- Shortage of anchor tenants (currently, 2 HEBs and a future Wal-Mart)



What the City Should Do

From survey interviews

- Provide façade guidelines/standards;
- Provide sign standards;
- Tax abatements;
- Code enforcement (a 2-way street: too costly for many older buildings);
- Safety – police patrols;
- Add, improve or widen sidewalks for walkability;
- Improve and maintain streets and drainageways;
- Require cross-access easements between parking lots;

- Create an organization to coordinate revitalization, maintenance and marketing;
- Provide information and materials for marketing;
- Conduct engineering studies for infrastructure to determine needs;
- Demolish selected structures;
- Provide public parks and gathering areas;
- Clean the streets, sidewalks;
- Pass a resolution of commitment to corridor revitalization.
- Incorporate trees and landscaping with means to maintain/water;
- Communicate with neighborhoods;
- Make information and funding available to small businesses for landscaping, building maintenance, enhancing storefronts;
- Provide incentives for the addition of new housing units within the Corridor;
- Provide a new plan for state-of-the-art street and other exterior lighting;
- Develop a plan to minimize the impact of truck traffic from the Sky Mine.

From “Regenerating Older Suburbs”

- Provide bold vision for the Corridor;
- Become a risk-taking catalyst;
- Adopt design guidelines and financial structures;
- Offer parking and streetscape assistance;
- Coordinate promotion and management; and;
- Maintain financial support for residential development.

Consultant – See Recommendations under Pro-Active Revitalization Tools beginning on page 59.

Observations and Conclusions

Millennials are rejecting home ownership due to student loan debt and a desire for flexibility; With new amenities offered and rising interest rates for home mortgages, apartments will be an effective choice for housing;

Residential growth in the corridor will include very little traditional single family detached due to availability of developable residential land and vacant developed lot inventory; Demands of tenants are prompting developers to get creative;

Retailers can benefit from being near a larger center without being part of it;

Companies may choose not to locate in areas with inadequate streets or other inferior public facilities/services;

Existing businesses do not prosper where there are poor public infrastructure and services;

The traditional way of generating capital for public improvements may not be enough to accommodate all the infrastructure needs.

Many areas along the corridor appear to have continuous driveways with no curb cuts for defining turn-ins; Sidewalks appear to get lost along the retail corridor where there are few curbs and landscaping and trees requiring water are often neglected due to cost and lack of attention;

Sky Mine. According to the San Antonio Business Journal of June 28, 2013, there is a \$128 Million carbon-capture operation under construction by Skyonic Corporation, HB Zachry/Capitol Cement. The Sky Mine will curb Carbon Dioxide Emissions (chemicals) from the Capitol Aggregates cement plant will be turned into usable products, such as Hydrochloric acid and Sodium Bicarbonate (baking soda);

Sky Mine construction will employ 200 people with 50 full time employees needed to run the facility by end of 2014. The operation will result in a 15% (83,000 tons) reduction of airborne emissions from the plant quarry.

Steps to Improve the NEC Competitive Position

Options for Implementation

The City of San Antonio and the Northeast Corridor Revitalization Initiative Steering Committee have several options for implementation of a revitalization plan.

- **Pro-active** Revitalization requires a high level of commitment from the City and creation of special area;
- To **Facilitate** Revitalization can be somewhat effective by applying existing tools available;
- **No Action** would be when the City continues its regular maintenance and enforcement activities, allowing market forces to take their course, and possibly revitalizing the corridor.

PRO-ACTIVE Revitalization Tools

Public Improvement Districts (PID):

- PIDs offer an alternative means for financing public improvement projects needed for economic growth.
- Provide tool to allocate costs according to benefits received;
- Can provide means to fund supplemental services and improvements to meet community needs which could not otherwise be constructed or provided and be paid by those who benefit the most from them;
- Petition-driven, requires signatures of 50% of tax value owners within District;
- Difficult to create large PIDs; work best with small areas & clearly defined goals/objectives;
- Works on large undeveloped tracts with 1 or 2 owners; and
- Financed through assessment (say 0.08 to 0.17 per \$100 valuation) against all property owners in District;
- Works in residential, commercial or mixed-use areas.

Municipal Management Districts (MMD):

- Created to “promote, develop, encourage, and maintain employment, commerce, transportation, housing, tourism, recreation, arts, entertainment, economic development, safety, and the public welfare within a defined geographic area;”
- More than 2/3 of the Municipal Management Districts in Texas (more than 40) have been created in the greater Houston area; (e.g. Downtown, Brays Oaks, Sharpstown and League City);
- Commercial property owners create a MMD to **enhance a defined business area** to finance facilities, infrastructure and services beyond those provided by the City, using the same creation requirements as a PID;
- Public improvement projects and services may be paid for by a combination of self-imposed ad valorem taxes, impact fees or special assessments upon those property owners that benefit;
- Depending on its priorities based on community needs, it may also provide **supplemental services** for advertising, business recruitment, promote of health & sanitation, traffic control, landscaping, lighting, signs, walkways, drainage, water, waste water, solid waste, streets, power facilities, parks, parking facilities, transit systems and other similar improvements.

Neighborhood Empowerment Zone (NEZ):

The Texas Legislature approved a statute in 1999 that would allow cities to create Neighborhood Empowerment Zones for potential economic development. It is created to promote housing, affordable housing, increase economic development, increase quality of social services, education, public safety or rehab affordable housing within a designated zone. Cities have power within the zone to do the following:

- Refund Building Fees. Allows the City to waive or adopt fees related to construction of buildings in the zone, including impact fees and fees for the inspection of buildings;
- Refund and Abatement of Sales Taxes. City may agree to refund and abate sales taxes on sales made within the zone for up to 10 years in order to benefit the zone.
- Abatement of Property Taxes. City can enter into agreements for up to ten years for the abatement of City property taxes on property in the zone.
- Achieve Environmental Goals. City can set performance standards to encourage the use of alternative building materials that address environmental concerns or to the building costs, maintenance or energy consumption.
- City Council adopts a resolution determining that creation of a zone would: promote an increase in economic development; promote an increase in the quality of social services, education or public safety; promote creation of affordable housing; OR promote rehabilitation of affordable housing.

Tax Increment Reinvestment Zone (TIRZ)

Create a TIRZ to help finance the cost of redevelopment and encourage development in areas that would otherwise not attract sufficient market development in a timely manner.

- Create the Zone when sufficient improvements within the Zone are a *known factor*: include Wal-Mart (by the end of 2013) and the Sky Mine (by end of 2014);
- Set aside taxes attributable only to new development (tax increments) over a base year amount, in a fund to finance public improvements within the boundaries of the proposed zone;
- Use TIRZ funds in ways not allowed by other types of Districts, such as façade preservation, acquisition of property, demolition of private improvements, etc.;
- Empower the TIRZ to condemn and acquire private property and to borrow against future revenue.

Potential Revenue from a Corridor TIRZ

Assuming the TIRZ created by the City in 2014. If the TIRZ is established in 2014 before the Sky Mine (the *known factor*) is on the Tax Rolls, it would generate an estimated **\$8,550,000, or \$570,000** annually for operating revenue and debt service based on the City's tax rate of \$0.57/\$100 assessed valuation. The projected investment at the Sky Mine is \$125,000,000; our assumption for the Tax Increment is \$100,000,000. Proposed term of the TIRZ is 15years with a collection rate of 100%.

Projected revenue for the TIRZ with only the Sky Mine included as tax base is \$570,000 annually.

Tools to FACILITATE Revitalization

- Tax Abatements:
 - Current City policy ties tax abatements to permanent new job creation;
 - City has had policy of no tax abatements for retail projects;
- Chapter 380 Agreements (loans/grants for urgent or highly desirable projects);
- Code enforcement (Take advantage of “Existing Structure” Code);
- Expedite approvals;
- Waive fees (building permits, plat applications, demolition, moving, zoning, easement vacation application, impact fee, inspection, sign permit);
- Release of City liens (weed, demolition, board-up/open structure, paving);
- Coordinate infrastructure improvements w/developers;
- Provide Regular Maintenance;
- Grants from the City's Annual Budget;
- Capital Improvements designated Bond Issue;
- Urban Design ;
- Monitor and Measure success.

Urban Design

- Conceive new relationships between existing areas too isolated from each other and the rest of the City
- Conceive the nature of the parts themselves (pedestrian zones, work/live, multi-modal interfaces, and housing for non-traditional demographic groups usually housed in higher density parts of the City)
- Transforming the character might require multifunction zones; reduction of the lines between landscape in commercial areas and residential areas; integration of parks, gardens and foliage into commercial areas; the addition of more mixed uses; and more density of development. Mixed use could mean a variety of building sizes, scales and open space as well as uses.

Monitor and Measure success

- When the number of properties under redevelopment in the Corridor reaches a threshold, it becomes more attractive to would-be developers – what is the threshold?
- The number of residences that are renovated or built each year;
- Compare the Total square feet of commercial space renovated or built each year;
- The increase in appraised value each year;
- Ratio of private investment to public investment in dollars at the end of each year;
- Momentum and ability to generate additional private investment (w/out incentives)
-

Conclusions from Case Studies

- Adopt a redevelopment **strategy and theme**;
- Identify and establish a **new focus**;
- **Follow-through** on redevelopment efforts to achieve success and credibility;
- **Be realistic** regarding market demand;
- General strategies:
 - Build on core assets (i.e. Perrin Estate)
 - Offer different housing types (single family, multifamily, townhomes, market rent, affordable)
 - Create a walkable retail environment & allow apartments in areas of too much retail zoning.
 - Be ready for transportation options (walking, bicycles, trails to special places, bus, auto)
 - Facilitate new land use patterns (some higher densities and Transit-Oriented Development)
 - Take advantage of growing diversity and benefit from it as a wave of the future
 - Form partnerships and coalitions for success
- **Make improvements in fabric of Corridor** - function, architecture, accessibility and environment;
- **Increase the number of households** through added housing units (apartments);
- Bring **new shoppers** to the Corridor with housing to replace those that have abandoned it;
- Don't hesitate to **completely reposition** all or part of the Corridor through unheard of changes (adaptive reuses, reduction, demolition, conversion); and
- Generate **new excitement** so the strategies can be achieved through *momentum*.

Recommendations

Steps to Improve the NEC Competitive Position

General Recommendations

1. Adopt a **pro-active attitude** and provide the tools for successful revitalization;
2. Encourage strong **pro-active leadership** from within the Corridor Business Community to help focus on redevelopment;
3. Divide the NEC into two segments: a **RETAIL** (Nacogdoches) Segment north of Wye Drive and a **MIXED USE** (Perrin Beitel) Segment south of Wye Drive.
4. Prepare design guidelines for façade preservation, signage and landscaping to allow, rather than to impose, on owners of marginal properties in both the Retail and Mixed Use Segments of the Corridor.
5. Provide design assistance to all property owners in the NEC to make sketches that illustrate what their facades could look like when applying the design guidelines;
6. Create a **village theme** around the intersection of Thousand Oaks & Nacogdoches in the Retail Segment, make it **walkable** for at least the village, if not entire retail corridor;
7. Create a Tax Increment Reinvestment Zone (TIRZ) to help finance the cost of redevelopment and encourage development in areas that would otherwise not attract sufficient market development in a timely manner.
 - a. Create the Zone when sufficient improvements within the Zone are a *known factor*: include Wal-Mart (by the end of 2013) and the Sky Mine (by end of 2014);
 - b. Set aside taxes attributable only to new development (tax increments) over a base year amount, in a fund to finance public improvements within the boundaries of the proposed zone;
 - c. Use TIRZ funds in ways not allowed by other types of Districts, such as façade preservation, acquisition of property, demolition of private improvements, etc.;
 - d. Empower the TIRZ to condemn and acquire private property and to borrow against future revenue.
Note: Projected revenue for the TIRZ with only the Sky Mine included as tax base is \$570,000 annually.
8. Establish a **Public Improvement District** (PID) for each Segment of the Corridor to focus attention on marketing, events, maintenance of public areas and watering of trees and vegetation.
9. Establish NEC Trade Area census tracts as a **Neighborhood Empowerment Zone**, which is authorized by the State of Texas to:
 - a. Promote and revitalize housing,
 - b. Promote and revitalize affordable housing,
 - c. Promote economic development;
 - d. Promote quality services; and
 - e. Achieve environmental goals.

Retailers and Retail

10. As basic tools have been selected and a plan adopted to revitalize the Corridor, begin recruiting the retailers from the following **RETAIL** Industry Groups as discussed above that represent significant LEAKAGE of retail sales from the Corridor: 1) Other General Merchandise Stores, including Discount Stores; 2) Department Stores; 3) Apparel Stores; 4) Shoe Stores; and 5) Book, Periodical & Music Stores.
11. Focus retail on the Corridor segment between Wye Drive and O'Connor, and revitalize Perrin-Beitel as a mixed-use, mostly non-retail Corridor segment;
12. Provide incentives for owners/landlords to holdout for higher quality tenants in the long-term, and disincentives to short-term revenue concerns in order to reverse the attitude toward maintenance of “**dark**” space;
13. Update traffic counts at key locations;
14. Create a parking plan to provide the accessible parking so necessary to retail success.

Non-Retail to Pursue and To Do

15. Begin recruiting developers for apartments to place appropriate apartments on the selected sites or other suitable locations; 2) recruit call centers; and 3) woo Alamo Colleges to place a community college campus or center within the Corridor and at the same time recruit technical schools and trade schools for the Corridor by promoting existing vacant buildings and space.
16. Revitalize Perrin Beitel south of Wye Drive as a **mixed-use**, primarily non-retail Corridor Segment;
17. Create a Public Improvement District (PID) to address the needs of a mixed-use non-retail Corridor Segment;
18. Leverage the anchor-type traffic generated by the Post Office by directing motorists to shop beyond Wurzbach Pkwy and on Nacogdoches;
19. Recruit additional personal and business service-types (child care, Laundromat, urgent care and professionals) and even fast food retailers to the mixed-use corridor segment;
20. Provide “gathering” places and landscaping in each segment;

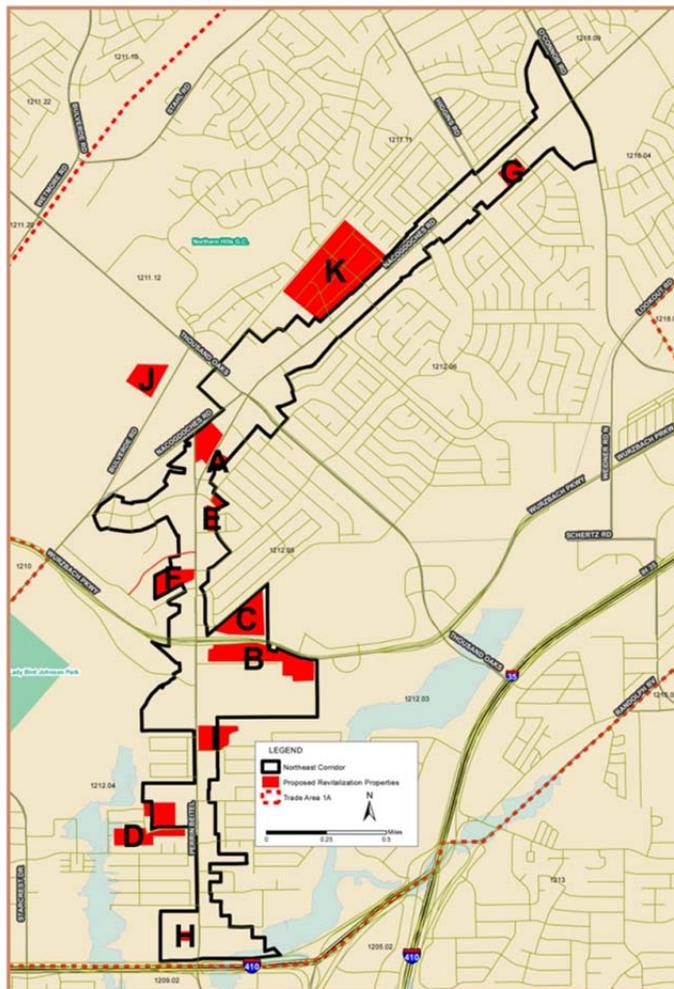
Residential in the Corridor

21. Assist and facilitate the addition of 1,000 multi-family units (3-6 projects) over the next 5 years to supplement the existing market. To develop 1,000 units or more, consider the following priorities:
 - A. Properties (4) associated with the vacant Perrin Oaks Plaza at 11823 Perrin Beitel, and 2 properties of former Bank of America at 11714 Perrin Beitel, requiring acquisition and demolition. Total: 9.3 ac.
 - B. Property owned by NEISD: 22.1 acres of vacant land for acquisition (all or part) between Post Office Dr and east bound Wurzbach Pkwy east of Perrin Beitel;
 - C. Property east of Perrin Beitel, an 18.46-acre vacant land triangle for acquisition between Schertz Rd and west bound Wurzbach Pkwy access road. This property is adjacent to former Longhorn Quarry;
 - D. The former Perrin Estate with frontage on Swan's Landing near Perrin Beitel - Consider multifamily on the Estate and townhouse-style units on vacant frontage of Swan's Landing, estimated total: 10 ac;

- E. Properties at 4310 Naco Perrin and 4400 block of Naco Perrin on the west side of the street - Encourage townhouse-style quad-plexes or similar rentals on 3.31 acres (2.25+ 1.06) of vacant land east of Perrin-Beitel;
- F. Properties 11003 and 11011 Perrin Beitel include RV storage and used car dealer on total of 7.49 ac.

Recommendations for Revitalization

- 22. Add the following properties to the Corridor if creating a TIRZ: 1) Sky Mine on Old Bulverde Rd; 2) vacant land between Bulverde Rd and Old Nacogdoches Rd; and 3) Bell Dr residential area that includes Skyline Blvd, Middle Ln, Cisco Blvd, Ronald Dr and Erin Blvd. This is a neighborhood in very poor condition with mostly new streets that should be revitalized/renewed.
- 23. Assist in creating a unique themed destination “dive” in an appropriate location in the Retail Segment;
- 24. Influence SAHA to provide better management of apartments on Roszell to become better neighbors to the Corridor;
- 25. Provide, install and maintain trees and landscaping sustainable with watering from a watering truck;
- 26. Review curb cuts and driveways in the Retail Corridor for possible reducing of widths.
- 27. Prepare a sidewalk plan that provides well-defined and safe sidewalks, especially in the Retail Corridor;
- 28. Develop and implement a plan throughout the Corridor for state-of-the-art exterior lighting;



Recommended Properties for Revitalization

- A. Apartments at 11823 & 11714 Perrin Beitel (9.3 ac.)
- B. Apartments at NEISD property on Wurzbach Pkwy & Post Office (20.43 ac.)
- C. Apartments at Schertz & Wurzbach Pkwy (18.46 ac.)
- D. Apartments & TH at former Perrin Estate & Swans Landing (10 ac.)
- E. Apartments/TH on Naco Perrin east of Perrin Beitel (2.25 ac.)
- F. Apartments at 11003 & 11011 Perrin Beitel (RV Storage)(7.49 ac.)
- G. **Public Park** (4.56 ac.)
- H. Trade School or Call Center (former Lack’s, 47,000 sq.ft. bldg. area)
- I. Call Center or Trade School (former call center, 68,000 sq.ft.)
- J. Sky Mine at Capitol Cement quarry
- K. Skyline subd At Bell Dr & Middle Ln.

Property Acquisition

Consultant recommends that the properties shown on the following map be considered by the TIRZ for acquisition and disposition.

29. Acquire and demolish the obstacle of Perrin Oaks Plaza shopping center that is the number one deterrent to attracting other national retailers which is in the Retail (Nacogdoches) Segment;
30. Acquire and demolish the bank structure that is for *lease only*, but restricted from use as a financial institution and is also in the Retail (Nacogdoches) Segment; (*Because of the restrictions, Bexar Appraisal District has the bank improvements valued at \$100.*)
31. Acquire vacant lots and substandard houses in the Bell Drive/Middle Lane area and make available to builders in order to revitalize the neighborhood and add consumer households. (*There are 137 houses & lots with median total appraised value of \$47,370 and more than 1/3 are valued below \$40,000.*)
32. Code compliance should require that the fire-gutted 2-story building (former Playmates) at 11203 Wye Dr. at Perrin-Beitel be razed.
33. Acquire 2 properties at 9834 Perrin Beitel for use as a public park. (*The property currently includes the only Curandero/fortune teller in the Corridor, but most is vacant land. Owner is using part for storage of landscaping materials and part of the vacant land is outside the Corridor boundary. The south east corner of the property abuts Clear Springs Elementary and would also have access to Clear Springs. It is as centrally located within the Corridor as any vacant property fronting on Perrin Beitel or Nacogdoches.*)
34. Acquire Commerce Business Park and relocate existing businesses to other locations and demolish the structures to achieve an aesthetic quality at that corner.

Marketing

35. Incorporate effective marketing that will give property owners, business owners and investors the confidence the proposed redevelopment will happen;
36. Establish a Public Improvement District (PID) for each Segment of the NEC and form an association to focus attention on marketing, events, maintenance of public areas and watering of trees and vegetation.
37. Team up with property owners, brokers and agents with a current interest in the NEC;
38. Make presentations to all business & property owners, local real estate developers, investors, management companies and brokers in order to communicate current market conditions and plans for the NEC;
39. Designate and support an area to accommodate “incubator” and “start-up” businesses (baby boomers are becoming entrepreneurs);
40. Provide *incentives* for owners/landlords to holdout for higher quality tenants in the long-term, and provide *dis-incentives* to short-term revenue concerns in order to reverse attitudes toward maintenance of “**dark**” space.

41. Maintain an inventory of active listings of for sale or lease when the overall vacancy rate of both retail and non-retail space is 10% or greater; provide a map of locations; lease rates and asking prices as available;
42. Provide a billboard or other method south of Wurzbach Pkwy near Post Office to direct motorists exiting the Post Office to shop farther north along the Nacogdoches Retail Segment.
43. Monitor, define and **measure success** for both the RETAIL (Nacogdoches) and MIXED-USE (Perrin Beitel) Segments of the Northeast Corridor.
 - a. *When the number properties revitalized reach a set threshold;*
 - b. *The number of homes rehabilitated each year;*
 - c. *Amount of increase in appraised value each year.*

In summary, the most important recommendations and over-arching tasks for the NEC Steering Committee and the City to undertake are the following:

- Adopt a **pro-active attitude** and provide the tools for successful revitalization;
- Encourage strong **pro-active leadership** from within the Corridor Business Community to help focus on redevelopment;
- Create a Tax Increment Reinvestment Zone (TIRZ) to help finance the cost of redevelopment and encourage development in areas that would otherwise not attract sufficient market development in a timely manner.
- Establish a **Public Improvement District** (PID) or a business association for the Corridor or each Segment to focus attention on marketing, events, maintenance of public areas and watering of trees and vegetation.
- Establish NEC Trade Area census tracts as a **Neighborhood Empowerment Zone**, which is authorized by the State of Texas.

Successful implementation of these recommendations will assure successful revitalization in both the short-term and the long-term.

GLOSSARY OF TERMS

Average Daily Traffic- The average number of vehicles passing a selected location on a street, going both directions during a 24-hour period.

Absorption (Net)- The change in occupied space in a given time period.

Available Square Footage- Net rentable area considered available for lease; excludes sublease space.

Baby Boomers- Those born after World War II between 1946 and 1964.

Building Class A- includes those prestigious buildings situated in prime locations offering high quality standard finish, excellent amenities and commanding premium rental rates.

Building Class B- includes well-located but perhaps older buildings with average standard finish and some amenities.

Building Class C- Usually older buildings in secondary locations with few, if any, amenities

Building Permit- A document provided by a government allowing a structure to be built.

Call Center- A consolidated location for incoming or outgoing calls employing upwards of 100 people and usually related to solving customer service issues.

Code Enforcement- Efforts by a government to uphold its building laws.

Community Center- Generally ranging between 100,000 – 250,000 square feet and usually anchored by grocery store tenant.

Core Assets- Items that are essential to the profitability and success of any given enterprise.

Cross-Access Easement- A way to accommodate vehicular traffic going from one parcel to another without reentering the street.

Consumer Spending- The monetary expenditures by groups within a given economy.

Demand- The need or desire to buy more goods or services

Disposable Income- Money left over to spend on consumer goods that are left over after taxes and other expenses.

Diversity- The variation of ethnicity and/or race within a certain area.

Diversity Index- A quantitative measure that reflects how many different types such as species there are in a dataset and simultaneously takes into account how evenly the basic entities such as individuals are distributed among those types.

Ethnicity- Self-Identified group that involves similar cultural values and/or race.

Flex- new generation of service center product designed with flexibility to serve as either office or warehouse space based on use of windows versus overhead doors. The majority of flex space in San Antonio market has been built since the late 1990's and is finished as 100% office space.

Gen-Xers- Those born in the late 1960's to early 1980's after the baby boomers.

Generation Y/Millennials- Those born from the early 1980's to around 2000.

Design Standards- A predetermined set of requirements regarding the appearance and layout of properties.

Households- More than one person occupying a housing unit.

Entitlements- Privileges or rights guaranteed by a certain government entity.

Industry Code- A number assigned to a certain classification or type of industry.

Infrastructure- All the services and facilities including roads, sewer, power, emergency, etc., provided by either public or private entities.

Industry Group- A classification for certain businesses that have related fields of sales.

Land Use- The presumed, actual, or required use of a parcel of land.

Retail Leakage- Spendable income lost to other trade areas.

Life Mode Group- Market segments that share common traits such as income, and age; this will allow for tailored retail mixes in certain areas.

Light Industrial- This is a classification of industrial use that has generally low environmental impact and can involve offices, or warehouses, with minimal retail.

Median Household Income- The average amount earned by those within a given household.

Municipal Management Districts- Special districts set up to promote various economic improvements in a certain area.

Neighborhood Center- Anchored centers generally ranging between 30,000 – 100,000 square feet.

Neighborhood Empowerment Zone- An area set up to promote affordable housing, economic development or improved social services.

Northeast Corridor- Areas bounding Perrin-Beitel, Nacogdoches, and Naco-Perrin from IH 410 to O'Connor in San Antonio, Texas.

N.I.M.B.Y. - An acronym meaning Not In My Back Yard that is usually employed by opponents of proposed developments.

Overall Vacancy- All unoccupied lease space including direct and sublease.

Psychographics- A type of demographic analysis that takes into consideration various psychological attributes.

Public Improvement Districts (PID) - Special districts set up to promote improvements to the public infrastructure.

Retail Gap- The amount of leakage within a certain area compared to the amount that could be attained.

Retail Mix- A variety of retail meant to satisfy a certain market and provide options for consumers.

Retail Synergy- The extent of which retail stores feed off each other within a given area.

Renovation- Improvement to the appearance and/or use of a structure.

Revitalization- Improvements to the economy, aesthetics, or health of a destitute area.

Senior Services- Amenities provided to those over 60 years of age to assist in basic living needs.

Service Center- office showroom or light manufacturing space consisting of 30% or more office finish/air conditioned space and featuring optional grade/dock loading, attractive landscaping, generous parking and generally 12' – 18' clear heights.

Strip Center- Unanchored centers less than 30,000 square feet.

Supply- In economics, the amount of goods available to the consumer.

Retail Surplus- The amount of retail is greater than the potential sales in a trade area.

Tapestry Segments- Customer diversity in terms of lifestyle, and behavioral attributes.

Tenant Mix- Various types and categories of tenants within a leased building.

Tax Increment Reinvestment Zone (TIRZ) – In Texas, an area set up to facilitate improvements through captured taxes that are accrued through resulting higher land values.

Tenure- The range of households that either rent or own thus an indication of the length of stay within a certain area.

Trade Area- An area where most of the customers come from and prefer to do business.

Tax Abatement- A decrease in tax requirement meant to incentivize development.

Trade School- A public or private institution focused directly on a specific field of work.

Urbanization Group- Market segments sharing the same locale.

Vocational School- A public or private institution focused on content related to a certain field of study.

Walkability- The extent of which a certain area can be accessed and used by pedestrians.

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**Table 1
Population Trends**

| Census Tract | 2000 Total Population | 2010 Total Population | Avg Annl Chng 2000-10 | 2013 Total Population | 2018 Total Population | Avg Annl Chng 2013-18 |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| 120502 | 5,411 | 5,155 | -0.5% | 5,209 | 5,501 | 1.1% |
| 120901 | 1,945 | 2,077 | 0.7% | 2,121 | 2,252 | 1.2% |
| 120902 | 6,180 | 6,123 | -0.1% | 6,195 | 6,511 | 1.0% |
| 121000 | 7,242 | 7,095 | -0.2% | 7,293 | 7,816 | 1.4% |
| 121110 | 4,694 | 4,895 | 0.4% | 4,953 | 5,181 | 0.9% |
| 121111 | 6,830 | 6,591 | -0.3% | 6,942 | 7,637 | 1.9% |
| 121112 | 3,479 | 3,771 | 0.8% | 3,909 | 4,239 | 1.6% |
| 121203 | 4,209 | 3,996 | -0.5% | 4,126 | 4,454 | 1.5% |
| 121204 | 7,272 | 7,747 | 0.7% | 8,123 | 8,924 | 1.9% |
| 121205 | 3,238 | 3,496 | 0.8% | 3,318 | 3,235 | -0.5% |
| 121206 | 7,737 | 7,267 | -0.6% | 7,463 | 7,961 | 1.3% |
| 121300 | 4,846 | 6,072 | 2.5% | 6,136 | 6,351 | 0.7% |
| 121803 | 4,234 | 4,549 | 0.7% | 4,701 | 5,063 | 1.5% |
| 121804 | 6,071 | 6,353 | 0.5% | 6,256 | 6,518 | 0.8% |
| 121808 | 2,137 | 3,436 | 6.1% | 3,473 | 3,608 | 0.8% |
| 121809 | 4,193 | 4,982 | 1.9% | 5,293 | 5,898 | 2.2% |
| 121810 | 4,103 | 4,387 | 0.7% | 4,427 | 4,623 | 0.9% |
| 121811 | 974 | 4,476 | 36.0% | 4,566 | 4,834 | 1.2% |
| NEC Trade Area | 84,703 | 92,363 | 0.9% | 94,392 | 100,480 | 1.3% |
| Trade Area 1a | 45,166 | 47,639 | 0.5% | 48,903 | 52,474 | 142.0% |
| San Antonio | 1,150,947 | 1,327,407 | 1.5% | 1,370,227 | 1,470,515 | 1.4% |
| Bexar County | 1,392,931 | 1,714,773 | 2.3% | 1,793,579 | 1,946,940 | 1.7% |
| Note: Some of the changes from 2000 to 2010 are due to splitting of census tracts. | | | | | | |
| Source: U.S. Bureau of the Census 2000, 2010; Environmental Systems Research Institute Business Analyst Online (USRI BAO); Wendell Davis & Associates | | | | | | |

Note: The source for all demographics tables (Tables 1-24) is: U. S. Bureau of the Census 2000, 2010; Environmental Systems Research Institute Business Analyst Online (ESRI BAO); Wendell Davis & Associates.

**Table 2
Population by Age Group: 2013**

| Census Tract | 2013 Pop by Age | Under 18 | 18 - 24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 - 64 | 65 - 74 | 75 - 84 | 85 + | 18 + | 18 - 64 |
|----------------|--------------------|-------------|---------|---------|---------|---------|---------|---------|---------|------|-------|---------|
| 120502 | 5209 | 29.8% | 9.9% | 13.3% | 12.1% | 12.9% | 11.2% | 6.1% | 3.9% | 1.2% | 70.2% | 59.4% |
| 120901 | 2121 | 20.7% | 8.7% | 11.6% | 9.6% | 12.7% | 12.6% | 7.8% | 7.2% | 7.9% | 79.3% | 55.2% |
| 120902 | 6195 | 18.4% | 9.5% | 17.8% | 11.2% | 11.4% | 12.3% | 8.4% | 6.0% | 3.9% | 81.6% | 62.2% |
| 121000 | 7293 | 22.7% | 9.7% | 13.8% | 12.4% | 14.8% | 11.6% | 8.0% | 5.0% | 1.9% | 77.3% | 62.3% |
| 121110 | 4953 | 25.2% | 9.0% | 16.1% | 14.5% | 15.4% | 11.6% | 5.6% | 2.2% | 0.5% | 74.8% | 66.6% |
| 121111 | 6942 | 25.5% | 10.2% | 14.6% | 13.3% | 13.7% | 11.5% | 7.2% | 3.2% | 1.0% | 74.5% | 63.3% |
| 121112 | 3909 | 19.2% | 8.3% | 16.8% | 13.0% | 13.0% | 12.3% | 8.9% | 4.9% | 2.9% | 80.8% | 63.4% |
| 121203 | 4126 | 24.5% | 8.8% | 13.2% | 12.2% | 15.3% | 13.0% | 7.4% | 4.3% | 1.1% | 75.5% | 62.5% |
| 121204 | 8123 | 20.8% | 11.6% | 20.1% | 12.2% | 11.8% | 9.5% | 6.5% | 3.9% | 1.3% | 79.2% | 65.2% |
| 121205 | 3318 | 30.0% | 9.1% | 16.9% | 13.1% | 11.2% | 8.8% | 6.2% | 3.3% | 1.0% | 70.0% | 59.1% |
| 121206 | 7463 | 24.1% | 8.9% | 12.4% | 12.7% | 12.6% | 12.8% | 9.9% | 5.2% | 1.8% | 75.9% | 59.4% |
| 121300 | 6136 | 21.1% | 7.2% | 10.3% | 11.5% | 11.5% | 13.8% | 10.6% | 9.2% | 5.0% | 78.9% | 54.3% |
| 121803 | 4701 | 27.3% | 8.5% | 14.4% | 13.9% | 12.6% | 12.2% | 8.3% | 2.7% | 0.6% | 72.7% | 61.6% |
| 121804 | 6256 | 28.4% | 11.0% | 15.1% | 13.1% | 12.8% | 10.3% | 5.7% | 2.7% | 0.8% | 71.6% | 62.3% |
| 121808 | 3473 | 26.7% | 10.3% | 12.7% | 15.2% | 15.3% | 10.7% | 5.1% | 3.3% | 1.9% | 73.3% | 64.2% |
| 121809 | 5293 | 23.7% | 9.0% | 13.3% | 14.4% | 15.6% | 13.5% | 6.9% | 3.2% | 1.2% | 76.3% | 65.8% |
| 121810 | 4427 | 25.9% | 10.5% | 13.8% | 14.8% | 17.9% | 11.7% | 3.8% | 1.6% | 0.5% | 74.1% | 68.7% |
| 121811 | 4566 | 31.3% | 9.3% | 14.5% | 19.7% | 13.8% | 7.1% | 3.1% | 1.6% | 0.4% | 68.7% | 64.4% |
| NEC Trade Area | 94393 | 24.5% | 9.5% | 14.7% | 13.2% | 13.5% | 11.5% | 7.1% | 4.1% | 1.8% | 75.5% | 62.4% |
| Trade Area 1a | 48903 | 24.5% | 9.9% | 15.2% | 13.1% | 13.3% | 11.4% | 7.2% | 3.8% | 1.4% | 75.5% | 62.9% |
| San Antonio | 1370227 | 25.9% | 10.9% | 15.3% | 12.9% | 12.7% | 10.6% | 6.3% | 3.4% | 1.4% | 74.1% | 62.4% |
| Bexar County | 1793579 | 26.2% | 10.8% | 15.1% | 13.1% | 12.8% | 10.6% | 6.3% | 3.3% | 1.4% | 73.8% | 62.4% |

**Table 3
Population by Age Group: 2018**

| Census Tract | 2018 Pop by Age | Under 18 | 18 - 24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 - 64 | 65 - 74 | 75 - 84 | 85 + | 18 + | 18 - 64 |
|----------------|--------------------|-------------|---------|---------|---------|---------|---------|---------|---------|------|-------|---------|
| 120502 | 5501 | 28.6% | 9.7% | 13.8% | 12.1% | 11.7% | 11.7% | 7.2% | 4.2% | 1.4% | 71.4% | 59.0% |
| 120901 | 2252 | 20.0% | 8.2% | 11.8% | 8.6% | 11.6% | 13.0% | 9.5% | 7.9% | 8.2% | 80.0% | 53.2% |
| 120902 | 6511 | 18.1% | 8.7% | 17.6% | 11.7% | 10.0% | 11.5% | 10.0% | 6.9% | 4.2% | 81.9% | 59.5% |
| 121000 | 7816 | 22.4% | 8.5% | 14.3% | 11.9% | 13.4% | 12.1% | 9.6% | 5.7% | 2.0% | 77.6% | 60.2% |
| 121110 | 5181 | 24.6% | 8.0% | 16.7% | 15.7% | 13.2% | 12.2% | 7.3% | 2.3% | 0.7% | 75.4% | 65.8% |
| 121111 | 7637 | 24.5% | 9.6% | 15.7% | 13.1% | 12.1% | 12.4% | 7.8% | 3.8% | 1.1% | 75.5% | 62.9% |
| 121112 | 4239 | 18.9% | 8.6% | 16.5% | 13.0% | 11.7% | 12.5% | 10.0% | 5.2% | 2.9% | 81.1% | 62.3% |
| 121203 | 4454 | 23.5% | 8.7% | 13.9% | 11.5% | 13.5% | 13.8% | 9.0% | 4.9% | 1.4% | 76.5% | 61.4% |
| 121204 | 8924 | 20.8% | 10.4% | 20.7% | 11.9% | 10.7% | 9.9% | 7.7% | 4.5% | 1.4% | 79.2% | 63.6% |
| 121205 | 3235 | 30.8% | 8.9% | 15.6% | 13.5% | 11.0% | 9.2% | 6.0% | 4.1% | 1.1% | 69.2% | 58.2% |
| 121206 | 7961 | 23.7% | 8.3% | 13.0% | 12.3% | 12.4% | 11.8% | 10.9% | 6.0% | 2.0% | 76.3% | 57.8% |
| 121300 | 6351 | 20.8% | 7.8% | 10.0% | 11.5% | 11.1% | 12.9% | 12.5% | 8.5% | 5.1% | 79.2% | 53.3% |
| 121803 | 5063 | 27.3% | 9.0% | 13.7% | 13.9% | 12.1% | 11.6% | 8.8% | 3.7% | 0.7% | 72.7% | 60.3% |
| 121804 | 6518 | 27.4% | 10.4% | 16.4% | 12.8% | 11.5% | 10.7% | 6.6% | 2.9% | 0.9% | 72.6% | 61.8% |
| 121808 | 3608 | 24.2% | 9.5% | 15.7% | 14.1% | 13.5% | 11.8% | 6.7% | 3.4% | 1.9% | 75.8% | 64.6% |
| 121809 | 5898 | 23.4% | 8.4% | 13.6% | 13.9% | 14.2% | 13.8% | 8.6% | 3.4% | 1.3% | 76.6% | 63.9% |
| 121810 | 4623 | 23.3% | 9.2% | 17.0% | 14.2% | 14.4% | 13.9% | 5.8% | 1.7% | 0.5% | 76.7% | 68.7% |
| 121811 | 4834 | 30.5% | 8.9% | 14.4% | 18.1% | 14.1% | 8.5% | 3.8% | 1.6% | 0.5% | 69.5% | 64.0% |
| NEC Trade Area | 100481 | 23.8% | 9.0% | 15.2% | 13.0% | 12.3% | 11.8% | 8.4% | 4.5% | 1.9% | 76.2% | 61.3% |
| Trade Area 1a | 52474 | 23.8% | 9.3% | 15.9% | 12.8% | 12.2% | 11.7% | 8.3% | 4.3% | 1.5% | 76.2% | 61.9% |
| San Antonio | 1470515 | 25.3% | 10.2% | 15.8% | 12.9% | 11.6% | 10.9% | 7.6% | 3.8% | 1.5% | 74.7% | 61.4% |
| Bexar County | 1946940 | 25.7% | 10.1% | 15.4% | 13.1% | 11.8% | 11.0% | 7.6% | 3.7% | 1.4% | 74.3% | 61.4% |

Table 4
Median Age Group: 2000 – 2018

| Area | Tract | 2000 | 2010 | 2013 | 2018 |
|--|--------|------|------|------|------|
| 1a | 121111 | 32.8 | 34.7 | 34.9 | 35.2 |
| 1a | 121112 | 35.7 | 38.6 | 38.6 | 38.7 |
| 1a | 121203 | 34.4 | 37.3 | 37.9 | 38.5 |
| 1a | 121204 | 33.0 | 31.7 | 32.1 | 32.9 |
| 1a | 121205 | 30.1 | 30.7 | 31.2 | 31.8 |
| 1a | 121206 | 36.6 | 38.7 | 39.0 | 39.3 |
| 1a | 121804 | 29.5 | 31.6 | 31.8 | 31.9 |
| 1a | 121808 | 30.7 | 35.3 | 36.0 | 36.1 |
| 1a | 121809 | 30.7 | 37.5 | 38.4 | 38.5 |
| 1 | 120502 | 30.1 | 32.7 | 33.1 | 33.7 |
| 1 | 120901 | 42.2 | 42.2 | 43.4 | 45.3 |
| 1 | 120902 | 33.6 | 37.3 | 37.6 | 38.2 |
| 1 | 121000 | 35.6 | 37.5 | 38.0 | 38.7 |
| 1 | 121110 | 32.0 | 34.8 | 34.9 | 35.7 |
| 1 | 121300 | 51.7 | 45.6 | 45.1 | 45.1 |
| 1 | 121803 | 33.7 | 34.7 | 35.2 | 35.5 |
| 1 | 121810 | 34.1 | 35.1 | 35.2 | 35.4 |
| 1 | 121811 | 34.1 | 31.8 | 32.3 | 32.8 |
| NEC Trade Area | | 33.6 | 35.5 | 35.9 | 36.3 |
| NEC Trade Area 1a | | 32.9 | 34.8 | 35.2 | 35.6 |
| San Antonio | | 32.2 | 32.8 | 33.1 | 33.9 |
| Bexar County | | 31.8 | 32.9 | 33.3 | 34.0 |
| Source: ESRI; Wendell Davis & Associates | | | | | |

Table 5
Population by Race/Ethnicity: 2013

| Census Tract | 2013 Population | White Alone | Black Alone | Other | Hispani c Origin | Diversity Index |
|----------------|--------------------|----------------|----------------|-------|---------------------|--------------------|
| 120502 | 5209 | 67.7% | 12.7% | 19.6% | 60.0% | 75.3 |
| 120901 | 2121 | 75.3% | 8.9% | 15.8% | 41.6% | 70.4 |
| 120902 | 6195 | 71.1% | 14.0% | 15.0% | 34.4% | 71.1 |
| 121000 | 7293 | 72.2% | 6.0% | 21.8% | 48.8% | 73.7 |
| 121110 | 4953 | 80.2% | 4.8% | 15.0% | 42.9% | 67.1 |
| 121111 | 6942 | 71.2% | 6.8% | 22.0% | 48.6% | 74.4 |
| 121112 | 3909 | 73.9% | 9.9% | 16.1% | 34.7% | 69.6 |
| 121203 | 4126 | 71.8% | 7.2% | 21.0% | 60.0% | 72.9 |
| 121204 | 8123 | 61.6% | 18.4% | 19.9% | 40.8% | 78.6 |
| 121205 | 3318 | 66.1% | 16.9% | 17.1% | 54.7% | 76.5 |
| 121206 | 7463 | 74.2% | 6.4% | 19.4% | 51.9% | 72.2 |
| 121300 | 6136 | 73.9% | 12.4% | 13.7% | 35.3% | 69.5 |
| 121803 | 4701 | 72.9% | 8.1% | 19.0% | 50.4% | 73.1 |
| 121804 | 6256 | 68.2% | 11.9% | 19.9% | 47.4% | 76.0 |
| 121808 | 3473 | 73.3% | 7.7% | 19.2% | 45.2% | 72.6 |
| 121809 | 5293 | 76.7% | 6.8% | 16.3% | 41.5% | 69.4 |
| 121810 | 4427 | 74.7% | 7.7% | 17.7% | 42.1% | 71.1 |
| 121811 | 4566 | 78.7% | 6.2% | 15.1% | 42.8% | 68.1 |
| NEC Trade Area | 94392 | 72.0% | 9.8% | 18.2% | 45.6% | 73.4 |
| Trade Area 1a | 48903 | 70.4% | 10.3% | 19.3% | 46.9% | 74.6 |
| San Antonio | 1370229 | 0.7% | 0.1% | 0.2% | 0.6% | 71.4 |
| Bexar County | 1793579 | 72.6% | 7.4% | 20.0% | 59.7% | 72.3 |

Population by Race/Ethnicity: 2018

| | 2018 Population | White Alone | Black Alone | Other | Hispanic Origin | Diversity Index |
|----------------|--------------------|----------------|----------------|-------|--------------------|--------------------|
| NEC Trade Area | 100481 | 71.6% | 9.7% | 18.7% | 48.2% | 73.8 |
| Trade Area 1a | 52474 | 70.0% | 10.2% | 19.7% | 49.4% | 74.9 |
| San Antonio | 1470516 | 0.7% | 0.1% | 0.2% | 0.7% | 70.8 |
| Bexar County | 1946940 | 72.7% | 7.4% | 19.8% | 61.4% | 71.9 |

**Table 6
Educational Attainment of the Population 2013**

| | 2013 Pop 25+ by Educ Attainment | Less than 9th Grade | 9th - 12th Grade, No Diploma | No High School Diploma | High School Graduate | Some College, No Degree | Assoc Degree | Some College/ Associates | Bachelor's Degree | Grad/ Prof Degree | Bachelor's Degree and Higher |
|---------------|---------------------------------------|---------------------------|------------------------------------|------------------------------|----------------------------|-------------------------------|-----------------|--------------------------------|----------------------|-------------------------|------------------------------------|
| 48029120502 | 3,164 | 8.3% | 10.3% | 18.6% | 35.4% | 26.8% | 5.3% | 32.1% | 9.1% | 4.7% | 13.8% |
| 48029120901 | 1,474 | 1.6% | 0.1% | 1.7% | 20.8% | 21.4% | 10.2% | 31.6% | 30.3% | 15.7% | 46.0% |
| 48029120902 | 4,385 | 4.9% | 3.5% | 8.4% | 22.2% | 24.3% | 7.0% | 31.3% | 16.6% | 21.5% | 38.1% |
| 48029121000 | 4,920 | 5.5% | 7.7% | 13.2% | 27.0% | 30.8% | 5.9% | 36.7% | 14.0% | 9.0% | 23.0% |
| 48029121110 | 3,267 | 0.9% | 3.0% | 3.9% | 21.2% | 30.5% | 12.1% | 42.6% | 20.1% | 12.2% | 32.3% |
| 48029121111 | 4,476 | 2.1% | 6.4% | 8.5% | 26.1% | 33.1% | 8.4% | 41.5% | 17.0% | 6.8% | 23.8% |
| 48029121112 | 2,803 | 2.9% | 5.3% | 8.2% | 22.9% | 31.6% | 5.1% | 36.7% | 21.9% | 10.4% | 32.3% |
| 48029121203 | 2,748 | 6.8% | 12.6% | 19.4% | 39.2% | 22.1% | 11.6% | 33.7% | 5.2% | 2.4% | 7.6% |
| 48029121204 | 5,306 | 3.1% | 5.6% | 8.7% | 22.4% | 29.2% | 10.4% | 39.6% | 20.8% | 8.5% | 29.3% |
| 48029121205 | 2,008 | 13.5% | 7.8% | 21.3% | 31.7% | 20.5% | 12.9% | 33.4% | 9.7% | 3.8% | 13.5% |
| 48029121206 | 5,030 | 5.5% | 8.4% | 13.9% | 31.7% | 30.0% | 8.3% | 38.3% | 12.1% | 4.2% | 16.3% |
| 48029121300 | 4,413 | 2.9% | 8.1% | 11.0% | 24.2% | 21.1% | 11.1% | 32.2% | 16.9% | 15.7% | 32.6% |
| 48029121803 | 3,042 | 3.1% | 9.7% | 12.8% | 27.2% | 33.9% | 9.3% | 43.2% | 10.7% | 6.1% | 16.8% |
| 48029121804 | 3,775 | 2.8% | 8.0% | 10.8% | 31.2% | 29.7% | 8.2% | 37.9% | 15.4% | 4.9% | 20.3% |
| 48029121808 | 2,229 | 1.3% | 2.2% | 3.5% | 25.5% | 29.3% | 14.9% | 44.2% | 24.1% | 2.6% | 26.7% |
| 48029121809 | 3,603 | 4.6% | 2.6% | 7.2% | 28.2% | 25.6% | 10.9% | 36.5% | 18.5% | 9.6% | 28.1% |
| 48029121810 | 2,840 | 0.6% | 5.0% | 5.6% | 21.4% | 33.3% | 9.2% | 42.5% | 19.7% | 10.7% | 30.4% |
| 48029121811 | 2,749 | 1.0% | 1.9% | 2.9% | 18.8% | 25.1% | 10.0% | 35.1% | 25.3% | 17.8% | 43.1% |
| NEC_TradeArea | 62,154 | 3.9% | 6.3% | 10.2% | 26.5% | 28.1% | 9.2% | 37.3% | 16.6% | 9.4% | 26.0% |
| TradeArea1a | 31,978 | 4.3% | 6.6% | 10.9% | 28.3% | 28.6% | 9.7% | 38.3% | 16.3% | 6.2% | 22.5% |
| San Antonio | 858,100 | 10.1% | 9.9% | 20.0% | 25.4% | 23.7% | 6.8% | 30.5% | 15.7% | 8.6% | 24.3% |
| Bexar County | 1,122,300 | 8.8% | 9.1% | 17.9% | 24.8% | 24.0% | 7.2% | 31.2% | 16.8% | 9.3% | 26.1% |

**Table 7
Employed Population 16+ by Occupation: 2013**

| Area | 2013 Empl Pop 16+ by | | Mgmt/ Business/ | Prof | Sales | Admin Support | Services | Blue Collar | Farming/ Forestry/ Fishing | Const/ Extraction | Installation/ Maint/ Repair | Production | Transp/ Material Moving |
|---------------|-------------------------|-----------------|--------------------|-------|-------|------------------|----------|----------------|----------------------------------|----------------------|--------------------------------|------------|-------------------------------|
| | Occup | White Collar | Financial | | | | | | | | | | |
| 48029120502 | 2,286 | 42.0% | 7.6% | 11.8% | 8.4% | 14.2% | 24.2% | 33.8% | 0.0% | 5.2% | 11.5% | 6.2% | 10.9% |
| 48029120901 | 754 | 78.8% | 16.7% | 34.9% | 12.1% | 15.1% | 11.5% | 9.7% | 0.0% | 5.7% | 0.7% | 1.1% | 2.3% |
| 48029120902 | 3,258 | 71.3% | 18.0% | 23.0% | 19.2% | 11.1% | 11.1% | 17.6% | 0.7% | 5.2% | 4.2% | 1.7% | 5.7% |
| 48029121000 | 3,335 | 50.3% | 11.9% | 15.3% | 6.9% | 16.1% | 27.9% | 21.9% | 1.3% | 9.1% | 4.3% | 4.1% | 3.1% |
| 48029121110 | 2,482 | 69.5% | 18.4% | 26.1% | 9.9% | 15.1% | 17.9% | 12.7% | 0.0% | 2.2% | 4.3% | 2.1% | 4.0% |
| 48029121111 | 3,661 | 63.5% | 11.4% | 17.6% | 14.9% | 19.6% | 13.5% | 23.0% | 0.0% | 7.6% | 7.4% | 4.4% | 3.7% |
| 48029121112 | 2,250 | 70.1% | 17.1% | 20.1% | 11.4% | 21.6% | 17.5% | 12.4% | 1.9% | 2.0% | 4.3% | 2.3% | 2.0% |
| 48029121203 | 1,864 | 44.7% | 2.5% | 13.7% | 9.3% | 19.2% | 22.4% | 32.9% | 0.0% | 6.4% | 9.2% | 6.8% | 10.6% |
| 48029121204 | 4,149 | 68.2% | 9.8% | 18.4% | 18.5% | 21.5% | 19.9% | 12.0% | 0.0% | 3.3% | 1.5% | 2.6% | 4.5% |
| 48029121205 | 1,306 | 51.4% | 6.2% | 13.7% | 16.3% | 15.2% | 33.8% | 14.9% | 0.0% | 0.8% | 6.0% | 1.9% | 6.1% |
| 48029121206 | 3,268 | 57.6% | 9.1% | 20.3% | 14.4% | 13.8% | 25.6% | 16.9% | 0.4% | 5.5% | 4.9% | 1.0% | 5.0% |
| 48029121300 | 2,085 | 67.2% | 14.1% | 26.9% | 8.3% | 17.8% | 18.9% | 13.9% | 0.8% | 2.9% | 4.9% | 2.2% | 3.1% |
| 48029121803 | 2,158 | 61.7% | 12.0% | 16.0% | 10.5% | 23.2% | 14.9% | 23.4% | 0.3% | 7.6% | 7.5% | 4.2% | 3.8% |
| 48029121804 | 2,921 | 65.9% | 11.7% | 19.4% | 18.6% | 16.2% | 17.5% | 16.5% | 0.0% | 2.8% | 6.7% | 2.8% | 4.2% |
| 48029121808 | 1,652 | 77.5% | 19.9% | 34.1% | 7.3% | 16.2% | 16.2% | 6.4% | 0.0% | 1.3% | 0.2% | 0.2% | 4.7% |
| 48029121809 | 2,440 | 75.3% | 18.8% | 21.5% | 13.6% | 21.4% | 10.7% | 14.1% | 0.0% | 4.5% | 2.1% | 2.2% | 5.2% |
| 48029121810 | 2,268 | 70.1% | 19.1% | 21.6% | 11.0% | 18.5% | 17.1% | 12.8% | 0.0% | 5.3% | 2.9% | 2.9% | 1.8% |
| 48029121811 | 2,269 | 69.9% | 16.9% | 36.3% | 9.5% | 7.2% | 13.6% | 16.5% | 0.0% | 3.6% | 2.1% | 5.3% | 5.5% |
| NEC TradeArea | 44,351 | 63.8% | 13.2% | 20.9% | 12.8% | 16.9% | 18.6% | 17.6% | 0.3% | 4.7% | 4.8% | 3.1% | 4.7% |
| TradeArea1a | 23,511 | 64.5% | 11.8% | 19.6% | 14.5% | 18.6% | 18.9% | 16.6% | 0.2% | 4.2% | 4.6% | 2.7% | 4.8% |
| San Antonio | 592,182 | 59.5% | 12.6% | 20.0% | 11.0% | 16.0% | 21.1% | 19.4% | 0.2% | 5.9% | 3.5% | 4.5% | 5.4% |
| Bexar County | 771,928 | 61.1% | 13.6% | 20.9% | 10.9% | 15.8% | 19.9% | 18.9% | 0.2% | 5.4% | 3.7% | 4.3% | 5.4% |

Table 8
Employed Population 16+ by Industry: 2013

| | 2013 Empl Pop 16+ by Industry | Agri/ Mining | Const | Manuf | Wholesale Trade | Retail Trade | Transp/ Utilities | Info | Finance/ Ins/ Real Estate | Services | Public Admin |
|---------------|--|-----------------|-------|-------|--------------------|-----------------|----------------------|------|---------------------------------|----------|-----------------|
| 48029120502 | 2,286 | 0.2% | 5.8% | 6.9% | 8.5% | 15.5% | 1.1% | 0.6% | 7.1% | 52.4% | 1.9% |
| 48029120901 | 754 | 1.7% | 4.1% | 2.7% | 1.5% | 11.1% | 1.2% | 2.3% | 8.4% | 62.7% | 4.4% |
| 48029120902 | 3,258 | 1.4% | 5.5% | 6.1% | 0.6% | 12.8% | 3.7% | 1.0% | 8.7% | 49.2% | 11.1% |
| 48029121000 | 3,335 | 0.4% | 11.8% | 3.0% | 3.8% | 10.7% | 3.1% | 0.7% | 8.8% | 51.0% | 6.6% |
| 48029121110 | 2,482 | 0.4% | 2.8% | 2.4% | 2.3% | 16.1% | 3.1% | 2.3% | 6.2% | 53.4% | 10.9% |
| 48029121111 | 3,661 | 0.7% | 8.7% | 3.1% | 2.8% | 14.8% | 8.2% | 2.2% | 7.3% | 46.8% | 5.5% |
| 48029121112 | 2,250 | 2.6% | 0.9% | 4.4% | 3.9% | 12.3% | 2.4% | 2.7% | 14.7% | 50.6% | 5.4% |
| 48029121203 | 1,864 | 0.0% | 7.0% | 1.6% | 2.1% | 16.3% | 8.3% | 0.9% | 9.0% | 51.3% | 3.6% |
| 48029121204 | 4,149 | 0.0% | 3.1% | 5.3% | 1.3% | 19.3% | 6.1% | 1.2% | 9.3% | 50.9% | 3.6% |
| 48029121205 | 1,306 | 0.0% | 0.7% | 4.8% | 1.5% | 10.2% | 6.4% | 1.8% | 11.9% | 58.9% | 3.9% |
| 48029121206 | 3,268 | 0.0% | 5.3% | 3.2% | 4.3% | 13.6% | 9.4% | 3.2% | 4.3% | 53.9% | 2.7% |
| 48029121300 | 2,085 | 0.0% | 5.4% | 3.3% | 5.0% | 13.3% | 2.8% | 0.0% | 7.8% | 49.2% | 13.3% |
| 48029121803 | 2,158 | 2.3% | 10.1% | 3.2% | 5.2% | 18.1% | 3.6% | 2.2% | 7.2% | 45.7% | 2.5% |
| 48029121804 | 2,921 | 0.0% | 4.0% | 3.6% | 3.5% | 17.2% | 7.6% | 1.8% | 7.5% | 45.5% | 9.2% |
| 48029121808 | 1,652 | 1.7% | 3.1% | 1.4% | 0.1% | 11.4% | 1.3% | 1.4% | 14.2% | 61.0% | 4.4% |
| 48029121809 | 2,440 | 0.0% | 8.0% | 4.7% | 4.3% | 18.7% | 3.3% | 0.5% | 7.2% | 45.5% | 7.8% |
| 48029121810 | 2,268 | 1.8% | 8.6% | 8.9% | 0.9% | 10.7% | 5.0% | 3.0% | 9.2% | 47.4% | 4.5% |
| 48029121811 | 2,269 | 0.0% | 3.7% | 4.1% | 3.4% | 12.0% | 4.1% | 1.0% | 10.2% | 54.9% | 6.4% |
| NEC_TradeArea | 44,352 | 0.6% | 5.8% | 4.1% | 3.1% | 14.5% | 4.9% | 1.6% | 8.5% | 50.7% | 6.1% |
| TradeArea1a | 23,511 | 0.5% | 4.9% | 3.7% | 2.8% | 15.5% | 6.3% | 1.8% | 8.8% | 50.6% | 5.2% |
| San Antonio | 592,182 | 0.6% | 6.8% | 5.9% | 2.3% | 12.2% | 4.3% | 1.6% | 9.0% | 52.6% | 4.6% |
| Bexar County | 771,928 | 0.7% | 6.5% | 5.9% | 2.4% | 12.1% | 4.5% | 1.6% | 9.2% | 52.0% | 5.1% |

**Table 10
Population 15+ by Marital Status: 2013**

| | 2013 Pop 15+ by Marital Status | Never Married | Married | Widowed | Divorced |
|---------------|-----------------------------------|------------------|---------|---------|----------|
| 48029120502 | 3,903 | 32.5% | 44.5% | 3.5% | 19.5% |
| 48029120901 | 1,736 | 23.3% | 55.6% | 8.8% | 12.3% |
| 48029120902 | 5,225 | 37.5% | 43.1% | 5.0% | 14.4% |
| 48029121000 | 5,927 | 27.1% | 47.1% | 7.8% | 18.0% |
| 48029121110 | 3,901 | 27.5% | 56.5% | 3.3% | 12.7% |
| 48029121111 | 5,481 | 29.3% | 47.5% | 5.4% | 17.8% |
| 48029121112 | 3,269 | 31.2% | 38.5% | 7.4% | 22.9% |
| 48029121203 | 3,268 | 36.4% | 41.7% | 8.1% | 13.8% |
| 48029121204 | 6,653 | 29.9% | 45.8% | 5.5% | 18.8% |
| 48029121205 | 2,440 | 34.0% | 52.7% | 2.5% | 10.9% |
| 48029121206 | 5,981 | 27.1% | 54.5% | 5.1% | 13.2% |
| 48029121300 | 5,047 | 19.8% | 57.4% | 8.7% | 14.2% |
| 48029121803 | 3,616 | 26.1% | 54.5% | 3.8% | 15.6% |
| 48029121804 | 4,758 | 33.3% | 39.3% | 4.5% | 22.8% |
| 48029121808 | 2,740 | 23.9% | 58.8% | 5.1% | 12.2% |
| 48029121809 | 4,285 | 30.5% | 47.8% | 6.1% | 15.5% |
| 48029121810 | 3,502 | 30.2% | 53.7% | 3.1% | 13.0% |
| 48029121811 | 3,357 | 25.0% | 62.9% | 2.7% | 9.4% |
| NEC_TradeArea | 74,998 | 29.2% | 49.5% | 5.4% | 15.9% |
| TradeArea1a | 38,875 | 30.4% | 47.2% | 5.5% | 16.9% |
| San Antonio | 1,072,091 | 34.2% | 48.0% | 5.6% | 12.3% |
| Bexar County | 1,398,215 | 32.6% | 50.5% | 5.2% | 11.7% |

**Table 11
Trends in Household Size: 2000 – 2018**

| Area | Tract | 2000 | 2010 | 2013 | 2018 |
|----------------|--------|------|------|------|------|
| 1a | 121111 | 2.79 | 2.71 | 2.70 | 2.69 |
| 1a | 121112 | 2.12 | 2.03 | 2.02 | 2.01 |
| 1a | 121203 | 2.66 | 2.58 | 2.57 | 2.57 |
| 1a | 121204 | 1.97 | 1.98 | 1.99 | 1.99 |
| 1a | 121205 | 2.32 | 2.50 | 2.52 | 2.53 |
| 1a | 121206 | 2.92 | 2.80 | 2.79 | 2.78 |
| 1a | 121804 | 2.78 | 2.67 | 2.67 | 2.67 |
| 1a | 121808 | 2.95 | 2.99 | 3.00 | 3.00 |
| 1a | 121809 | 2.72 | 2.67 | 2.66 | 2.65 |
| 1 | 120502 | 2.71 | 2.77 | 2.77 | 2.77 |
| 1 | 120901 | 2.03 | 2.06 | 2.05 | 2.05 |
| 1 | 120902 | 1.97 | 1.97 | 1.97 | 1.96 |
| 1 | 121000 | 2.50 | 2.47 | 2.46 | 2.45 |
| 1 | 121110 | 2.92 | 2.84 | 2.82 | 2.81 |
| 1 | 121300 | 2.20 | 2.43 | 2.46 | 2.48 |
| 1 | 121803 | 3.03 | 2.94 | 2.93 | 2.92 |
| 1 | 121810 | 3.15 | 2.97 | 2.96 | 2.95 |
| 1 | 121811 | 3.18 | 3.09 | 3.08 | 3.06 |
| NEC Trade Area | | 2.52 | 2.52 | 2.52 | 2.51 |
| Trade Area 1a | | 2.53 | 2.49 | 2.48 | 2.48 |
| San Antonio | | 2.77 | 2.71 | 2.70 | 2.69 |
| Bexar County | | 2.78 | 2.75 | 2.74 | 2.74 |

Source: ESRI; Wendell Davis & Associates

Table 13
Households by Income Group: 2013

| Area | Tract | Less than \$25,000 | \$25,000 - \$49,999 | 50,000 - 99,999 | \$100,000 and over | Av HH Income |
|----------------|--------|--------------------|---------------------|-----------------|--------------------|--------------|
| 1a | 121111 | 16.4% | 26.3% | 42.6% | 14.7% | \$66,529 |
| 1a | 121112 | 11.9% | 33.5% | 38.4% | 16.1% | \$65,832 |
| 1a | 121203 | 35.0% | 34.5% | 23.7% | 6.8% | \$43,129 |
| 1a | 121204 | 35.4% | 35.8% | 18.5% | 10.3% | \$55,597 |
| 1a | 121205 | 33.7% | 31.2% | 24.7% | 10.5% | \$47,300 |
| 1a | 121206 | 14.5% | 24.7% | 45.4% | 15.5% | \$67,123 |
| 1a | 121804 | 21.2% | 30.5% | 33.2% | 15.0% | \$58,624 |
| 1a | 121808 | 6.5% | 25.6% | 46.3% | 21.6% | \$82,875 |
| 1a | 121809 | 9.9% | 20.1% | 42.1% | 28.0% | \$79,454 |
| 1 | 120502 | 40.1% | 33.2% | 23.4% | 3.4% | \$38,688 |
| 1 | 120901 | 22.8% | 30.8% | 23.2% | 23.3% | \$69,374 |
| 1 | 120902 | 19.5% | 36.5% | 27.5% | 16.5% | \$74,123 |
| 1 | 121000 | 21.6% | 27.1% | 36.0% | 15.2% | \$61,034 |
| 1 | 121110 | 11.3% | 17.9% | 50.8% | 20.0% | \$72,442 |
| 1 | 121300 | 18.6% | 21.5% | 36.2% | 23.8% | \$74,917 |
| 1 | 121803 | 8.7% | 33.9% | 45.0% | 12.4% | \$62,864 |
| 1 | 121810 | 11.5% | 15.9% | 44.3% | 28.4% | \$80,392 |
| 1 | 121811 | 12.2% | 8.6% | 43.9% | 35.2% | \$88,791 |
| NEC Trade Area | | 20.4% | 27.9% | 34.9% | 16.8% | \$65,280 |
| Trade Area 1a | | 21.7% | 29.6% | 33.8% | 14.9% | \$62,332 |
| San Antonio | | 29.1% | 27.1% | 28.3% | 15.5% | \$60,961 |
| Bexar County | | 26.2% | 25.7% | 30.0% | 18.1% | \$66,408 |

Source: ESRI; Wendell Davis & Associates

Households by Income Group: 2018

| Area / 2018 | Less than \$25,000 | \$25,000 - \$49,999 | 50,000 - 99,999 | \$100,000 and over | Av HH Income |
|---------------|--------------------|---------------------|-----------------|--------------------|--------------|
| Trade Area | 17.0% | 20.7% | 40.2% | 21.9% | \$75,943 |
| Trade Area 1a | 18.3% | 22.6% | 39.0% | 20.0% | \$73,163 |
| San Antonio | 25.7% | 21.3% | 33.4% | 19.6% | \$71,162 |
| Bexar County | 22.7% | 19.8% | 35.0% | 22.5% | \$77,770 |

Table 14
Value of Owner-Occupied Housing Units: 2013

| Area | Tract | Owner Occ Hus | Less than \$50,000 | \$50,000 - \$149,999 | \$150,000- \$299,999 | \$300,000 and over | Avg Hsg Value |
|----------------|--------|---------------|--------------------|----------------------|----------------------|--------------------|---------------|
| 1a | 121111 | 1699 | 0.4% | 51.0% | 48.1% | 0.5% | \$149,735 |
| 1a | 121112 | 799 | 0.5% | 33.6% | 62.5% | 3.5% | \$183,292 |
| 1a | 121203 | 1009 | 18.8% | 74.7% | 4.8% | 1.7% | \$98,662 |
| 1a | 121204 | 990 | 2.2% | 42.5% | 37.7% | 17.4% | \$245,631 |
| 1a | 121205 | 465 | 1.3% | 58.3% | 38.3% | 2.1% | \$149,892 |
| 1a | 121206 | 1967 | 0.2% | 53.3% | 46.0% | 0.7% | \$148,551 |
| 1a | 121804 | 1223 | 0.3% | 58.0% | 39.7% | 1.9% | \$147,997 |
| 1a | 121808 | 914 | 0.3% | 39.5% | 59.2% | 0.9% | \$167,615 |
| 1a | 121809 | 1619 | 0.1% | 39.3% | 59.3% | 1.3% | \$169,287 |
| 1 | 120502 | 1042 | 4.0% | 91.6% | 3.2% | 1.2% | \$105,254 |
| 1 | 120901 | 389 | 0.0% | 8.0% | 64.6% | 27.6% | \$294,473 |
| 1 | 120902 | 935 | 0.2% | 19.4% | 26.5% | 54.1% | \$388,209 |
| 1 | 121000 | 1610 | 2.4% | 39.5% | 55.7% | 2.5% | \$175,155 |
| 1 | 121110 | 1487 | 0.1% | 32.2% | 64.7% | 3.1% | \$179,741 |
| 1 | 121300 | 1806 | 1.4% | 19.8% | 74.6% | 4.1% | \$202,021 |
| 1 | 121803 | 1224 | 0.3% | 64.4% | 35.3% | 0.0% | \$138,725 |
| 1 | 121810 | 1285 | 0.2% | 22.8% | 73.6% | 3.3% | \$193,035 |
| 1 | 121811 | 1239 | 0.0% | 17.2% | 77.1% | 5.7% | \$202,220 |
| NEC Trade Area | | 21673 | 1.6% | 42.8% | 50.1% | 5.5% | \$178,948 |
| Trade Area 1a | | 10685 | 2.2% | 50.0% | 45.0% | 2.8% | \$160,388 |
| San Antonio | | 276104 | 2.9% | 48.8% | 36.5% | 11.9% | \$183,506 |
| Bexar County | | 381931 | 3.2% | 44.0% | 38.2% | 14.8% | \$199,793 |

Value of Owner-Occupied Housing Units: 2018

| Area | 2018 | Less than \$50,000 | \$50,000 - \$149,999 | \$150,000- \$299,999 | \$300,000 and over | Avg Hsg Value |
|----------------|--------|--------------------|----------------------|----------------------|--------------------|---------------|
| NEC Trade Area | 23549 | 1.1% | 23.9% | 66.1% | 8.9% | \$214,978 |
| Trade Area 1a | 11785 | 1.7% | 27.7% | 63.7% | 6.9% | \$201,479 |
| San Antonio | 302572 | 2.0% | 34.1% | 48.2% | 16.0% | \$217,388 |
| Bexar County | 423820 | 1.9% | 29.2% | 49.8% | 19.1% | \$236,018 |

Source: ESRI; Wendell Davis & Associates

Table 15
Households by Tenure: 2013

| Area | Tract | 2013 | Owner | Renter | Vacant |
|----------------|--------|---------|-------|--------|--------|
| 1a | 121111 | 2,711 | 62.7% | 31.9% | 5.5% |
| 1a | 121112 | 2,058 | 38.8% | 55.2% | 6.0% |
| 1a | 121203 | 1,759 | 57.4% | 33.8% | 8.8% |
| 1a | 121204 | 4,509 | 22.0% | 68.6% | 9.4% |
| 1a | 121205 | 1,606 | 29.0% | 53.1% | 17.9% |
| 1a | 121206 | 2,847 | 69.1% | 24.8% | 6.1% |
| 1a | 121804 | 2,593 | 47.2% | 43.1% | 9.7% |
| 1a | 121808 | 1,151 | 79.4% | 16.6% | 4.0% |
| 1a | 121809 | 2,005 | 80.7% | 17.7% | 1.6% |
| 1 | 120502 | 2,098 | 49.8% | 39.9% | 10.3% |
| 1 | 120901 | 1,097 | 35.5% | 58.4% | 6.1% |
| 1 | 120902 | 3,719 | 25.2% | 57.5% | 17.3% |
| 1 | 121000 | 3,153 | 51.1% | 42.8% | 6.2% |
| 1 | 121110 | 1,842 | 80.7% | 14.5% | 4.8% |
| 1 | 121300 | 2,710 | 66.6% | 22.9% | 10.5% |
| 1 | 121803 | 1,662 | 73.6% | 22.7% | 3.7% |
| 1 | 121810 | 1,560 | 82.4% | 13.5% | 4.1% |
| 1 | 121811 | 1,533 | 80.8% | 15.9% | 3.3% |
| NEC Trade Area | | 40,577 | 53.4% | 38.4% | 8.2% |
| Trade Area 1a | | 21,239 | 50.3% | 42.0% | 7.7% |
| San Antonio | | 540,267 | 51.1% | 40.9% | 8.0% |
| Bexar County | | 690,872 | 55.3% | 37.1% | 7.6% |

Households by Tenure: 2018

| Area | 2018 | Owner | Renter | Vacant |
|----------------|--------|-------|--------|--------|
| NEC Trade Area | 43300 | 54.4% | 37.5% | 8.1% |
| Trade Area 1a | 22788 | 51.7% | 40.8% | 7.4% |
| San Antonio | 581109 | 52.1% | 40.2% | 7.8% |
| Bexar County | 749412 | 56.6% | 36.2% | 7.2% |

Table 16
Households by Number of Persons: 2010

| | 2010 HH by Size | 1 Person Household | 2 Person Household | 3 Person Household | 4 Person Household | 5 Person Household | 6 Person Household | 7 + Person Household |
|---------------|--------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-------------------------|
| 48029120502 | 1,864 | 26.3% | 28.9% | 15.5% | 14.1% | 7.7% | 4.2% | 3.3% |
| 48029120901 | 1,005 | 42.7% | 29.0% | 14.5% | 9.2% | 3.1% | 1.3% | 0.3% |
| 48029120902 | 3,035 | 45.2% | 32.2% | 11.3% | 6.0% | 3.5% | 1.2% | 0.6% |
| 48029121000 | 2,868 | 29.0% | 32.6% | 18.0% | 10.4% | 5.9% | 2.8% | 1.5% |
| 48029121110 | 1,725 | 18.3% | 30.7% | 20.4% | 18.4% | 7.2% | 3.1% | 1.9% |
| 48029121111 | 2,420 | 22.3% | 31.0% | 19.1% | 15.8% | 7.3% | 2.9% | 1.6% |
| 48029121112 | 1,857 | 41.1% | 31.9% | 15.3% | 7.9% | 2.7% | 0.7% | 0.4% |
| 48029121203 | 1,549 | 29.5% | 30.4% | 16.3% | 11.9% | 6.1% | 3.0% | 2.9% |
| 48029121204 | 3,903 | 45.3% | 29.8% | 13.1% | 7.1% | 2.9% | 1.2% | 0.4% |
| 48029121205 | 1,399 | 31.4% | 28.5% | 17.4% | 11.5% | 6.8% | 2.9% | 1.5% |
| 48029121206 | 2,592 | 21.2% | 33.3% | 17.0% | 13.0% | 9.0% | 3.6% | 2.9% |
| 48029121300 | 2,428 | 27.2% | 39.2% | 13.9% | 9.8% | 5.8% | 2.1% | 1.9% |
| 48029121803 | 1,543 | 17.3% | 32.1% | 18.1% | 16.0% | 9.6% | 4.0% | 3.0% |
| 48029121804 | 2,376 | 25.2% | 27.9% | 19.6% | 15.5% | 8.0% | 2.4% | 1.5% |
| 48029121808 | 1,094 | 15.8% | 28.9% | 21.0% | 18.7% | 9.5% | 3.3% | 2.7% |
| 48029121809 | 1,846 | 22.6% | 32.4% | 16.8% | 16.7% | 7.7% | 2.4% | 1.2% |
| 48029121810 | 1,476 | 13.3% | 29.3% | 23.6% | 20.7% | 9.1% | 2.6% | 1.3% |
| 48029121811 | 1,447 | 12.7% | 26.5% | 22.0% | 23.4% | 10.6% | 3.3% | 1.5% |
| NEC_TradeArea | 36,395 | 28.7% | 31.2% | 16.8% | 12.8% | 6.4% | 2.5% | 1.6% |
| TradeArea1a | 19,036 | 30.0% | 30.6% | 16.8% | 12.5% | 6.3% | 2.4% | 1.5% |
| San Antonio | 479,642 | 26.9% | 28.5% | 16.6% | 14.0% | 7.8% | 3.5% | 2.7% |
| Bexar County | 608,931 | 25.3% | 29.0% | 16.9% | 14.6% | 8.0% | 3.5% | 2.7% |

Table 17
Households by Tenure and Mortgage Status: 2010

| | by Tenure and Mortgage Status | Owner Occupied | Mortgage / Loan | Free and Clear | Renter Occupied |
|---------------|----------------------------------|-------------------|--------------------|-------------------|--------------------|
| 120502 | 1,864 | 55.6% | 31.5% | 24.1% | 44.4% |
| 120901 | 1,005 | 39.4% | 22.3% | 17.1% | 60.6% |
| 120902 | 3,035 | 30.5% | 17.4% | 13.0% | 69.5% |
| 121000 | 2,868 | 56.0% | 34.8% | 21.1% | 44.0% |
| 121110 | 1,725 | 85.4% | 74.0% | 11.5% | 14.6% |
| 121111 | 2,420 | 67.7% | 51.2% | 16.6% | 32.3% |
| 121112 | 1,857 | 42.8% | 31.7% | 11.0% | 57.2% |
| 121203 | 1,549 | 63.7% | 35.2% | 28.5% | 36.3% |
| 121204 | 3,903 | 24.1% | 14.0% | 10.1% | 75.9% |
| 121205 | 1,399 | 35.7% | 22.9% | 12.8% | 64.3% |
| 121206 | 2,592 | 74.6% | 49.3% | 25.3% | 25.4% |
| 121300 | 2,428 | 75.7% | 44.6% | 31.1% | 24.3% |
| 121803 | 1,543 | 77.5% | 59.4% | 18.1% | 22.5% |
| 121804 | 2,376 | 51.4% | 42.1% | 9.3% | 48.6% |
| 121808 | 1,094 | 83.5% | 73.9% | 9.6% | 16.5% |
| 121809 | 1,846 | 82.8% | 70.5% | 12.4% | 17.2% |
| 121810 | 1,476 | 86.5% | 80.6% | 5.9% | 13.5% |
| 121811 | 1,447 | 84.4% | 79.8% | 4.6% | 15.6% |
| NEC_TradeArea | 36,394 | 58.8% | 42.8% | 16.0% | 41.2% |
| TradeArea1a | 19,036 | 54.9% | 40.1% | 14.9% | 45.1% |
| San Antonio | 479,642 | 56.5% | 38.7% | 17.8% | 43.5% |
| Bexar County | 608,931 | 60.5% | 42.6% | 18.0% | 39.5% |

Table 18
Households by Disposable Income Group: 2012

| Disposable Income | Trade Area 1a | Trade Area | San Antonio |
|----------------------|------------------|---------------|----------------|
| <\$15,000 | 12.3% | 11.8% | 18.2% |
| \$15,000-\$24,999 | 13.8% | 12.5% | 14.8% |
| \$25,000-\$34,999 | 15.4% | 14.3% | 13.8% |
| \$35,000-\$49,999 | 18.2% | 18.2% | 16.6% |
| \$50,000-\$74,999 | 21.7% | 22.5% | 18.2% |
| \$75,000-\$99,999 | 9.8% | 10.5% | 8.2% |
| \$100,000-\$149,999 | 6.8% | 8.2% | 7.5% |
| \$150,000-\$199,999 | 1.0% | 1.1% | 1.4% |
| \$200,000+ | 0.9% | 0.9% | 1.2% |
| Total | 100.0% | 100.0% | 100.0% |

Table 19
Disposable Income by Age of Householder: 2012

Trade Area 1a

| Age of Householder | Total | <\$15,000 | \$15,000-\$24,999 | \$25,000-\$34,999 | \$35,000-\$49,999 | \$50,000-\$74,999 | \$75,000-\$99,999 | \$100,000-\$149,999 | \$150,000-\$199,999 | \$200,000+ | Disp Income | Disp Income |
|--------------------|--------|-----------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------------|---------------------|------------|-------------|-------------|
| Number | 19,598 | 12.3% | 13.8% | 15.4% | 18.2% | 21.7% | 9.8% | 6.8% | 1.0% | 0.9% | \$40,677 | \$51,294 |
| <25 | 1,168 | 25.3% | 26.2% | 20.5% | 14.6% | 9.5% | 2.2% | 1.6% | 0.1% | 0.0% | \$24,141 | \$29,555 |
| 25-34 | 3,607 | 12.6% | 15.2% | 17.4% | 20.6% | 20.8% | 7.9% | 4.8% | 0.5% | 0.3% | \$37,508 | \$45,427 |
| 35-44 | 3,603 | 8.7% | 11.9% | 13.8% | 21.9% | 22.8% | 10.8% | 8.0% | 1.2% | 0.9% | \$44,374 | \$54,830 |
| 45-54 | 3,862 | 9.7% | 9.9% | 11.5% | 16.1% | 25.9% | 12.9% | 10.5% | 1.9% | 1.6% | \$51,675 | \$62,386 |
| 55-64 | 3,413 | 12.2% | 12.2% | 12.7% | 16.1% | 25.0% | 11.2% | 8.0% | 1.1% | 1.6% | \$46,186 | \$57,134 |
| 65-74 | 2,294 | 10.9% | 11.3% | 19.2% | 18.5% | 22.9% | 9.3% | 5.8% | 1.1% | 0.9% | \$40,596 | \$51,518 |
| 75+ | 1,651 | 18.7% | 21.4% | 20.4% | 16.7% | 11.7% | 7.1% | 3.1% | 0.4% | 0.5% | \$28,915 | \$38,587 |

Trade Area

| Age of Householder | Total Households | <\$15,000 | \$15,000-\$24,999 | \$25,000-\$34,999 | \$35,000-\$49,999 | \$50,000-\$74,999 | \$75,000-\$99,999 | \$100,000-\$149,999 | \$150,000-\$199,999 | \$200,000+ | Median Disp Income | Avg Disp Income |
|--------------------|------------------|-----------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------------|---------------------|------------|--------------------|-----------------|
| Pct of Total | 37,269 | 11.8% | 12.5% | 14.3% | 18.2% | 22.5% | 10.5% | 8.2% | 1.1% | 0.9% | \$43,094 | \$53,481 |
| <25 | 1,987 | 24.9% | 22.5% | 20.9% | 16.1% | 10.7% | 2.9% | 1.9% | 0.2% | 0.1% | \$25,854 | \$31,506 |
| 25-34 | 6,611 | 11.8% | 13.7% | 16.3% | 20.9% | 21.9% | 8.8% | 5.8% | 0.5% | 0.3% | \$39,519 | \$47,708 |
| 35-44 | 6,865 | 8.2% | 11.1% | 12.6% | 21.9% | 23.5% | 11.7% | 9.1% | 1.1% | 0.8% | \$46,483 | \$56,635 |
| 45-54 | 7,445 | 9.2% | 9.1% | 10.5% | 15.9% | 26.4% | 13.7% | 12.1% | 1.8% | 1.4% | \$53,242 | \$63,776 |
| 55-64 | 6,523 | 11.8% | 11.3% | 11.8% | 15.6% | 25.4% | 11.6% | 9.8% | 1.2% | 1.6% | \$49,442 | \$59,644 |
| 65-74 | 4,244 | 10.6% | 10.7% | 17.9% | 17.9% | 23.8% | 10.0% | 7.0% | 1.3% | 0.9% | \$42,836 | \$53,749 |
| 75+ | 3,594 | 18.6% | 19.0% | 18.5% | 16.7% | 13.6% | 7.7% | 4.6% | 0.7% | 0.5% | \$30,891 | \$41,795 |

City of San Antonio

| Age of Householder | Total Households | <\$15,000 | \$15,000-\$24,999 | \$25,000-\$34,999 | \$35,000-\$49,999 | \$50,000-\$74,999 | \$75,000-\$99,999 | \$100,000-\$149,999 | \$150,000-\$199,999 | \$200,000+ | Median Disp Income | Avg Disp Income |
|--------------------|------------------|-----------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------------|---------------------|------------|--------------------|-----------------|
| Pct of Total | 496,903 | 18.2% | 14.8% | 13.8% | 16.6% | 18.2% | 8.2% | 7.5% | 1.4% | 1.2% | \$37,125 | \$49,538 |
| <25 | 31,618 | 32.7% | 20.8% | 17.0% | 14.9% | 9.8% | 2.6% | 2.0% | 0.2% | 0.1% | \$22,644 | \$29,573 |
| 25-34 | 94,916 | 16.6% | 15.8% | 16.0% | 19.7% | 18.0% | 7.2% | 5.5% | 0.7% | 0.5% | \$35,796 | \$44,595 |
| 35-44 | 91,656 | 12.8% | 12.9% | 12.6% | 20.5% | 19.6% | 9.9% | 9.0% | 1.5% | 1.2% | \$42,118 | \$54,349 |
| 45-54 | 96,388 | 14.6% | 11.2% | 11.0% | 15.4% | 21.8% | 10.6% | 10.9% | 2.5% | 2.1% | \$47,306 | \$61,029 |
| 55-64 | 85,173 | 19.4% | 13.4% | 11.9% | 14.1% | 19.7% | 9.0% | 9.0% | 1.5% | 2.0% | \$39,534 | \$55,278 |
| 65-74 | 54,061 | 17.9% | 15.0% | 18.6% | 14.5% | 16.9% | 7.8% | 6.7% | 1.6% | 1.0% | \$33,922 | \$48,225 |
| 75+ | 43,091 | 28.5% | 22.5% | 13.8% | 13.0% | 12.9% | 4.9% | 3.3% | 0.6% | 0.5% | \$24,309 | \$35,517 |

Table 20
Consumer Spending in the Trade Area: 2012

| | Total | % |
|----------------------|------------------------|-------|
| Services: | \$52,955,949 | 2.3% |
| Accessories: | \$8,670,924 | 0.4% |
| Education: | \$49,093,777 | 2.2% |
| Recreation: | \$113,577,895 | 5.0% |
| Food at Home: | \$173,175,595 | 7.6% |
| Home: | \$112,361,328 | 4.9% |
| Health Care: | \$147,346,276 | 6.5% |
| & Equipment: | \$55,037,576 | 2.4% |
| Investments: | \$63,839,113 | 2.8% |
| Retail Goods: | \$790,548,828 | 34.7% |
| Shelter: | \$564,251,937 | 24.8% |
| Audio: | \$44,973,098 | 2.0% |
| Travel: | \$61,389,629 | 2.7% |
| Repairs: | \$37,855,904 | 1.7% |
| Overall Total | \$2,275,077,829 | |

Table 21
Top Tapestry Segments in the Trade Area

| Rank | Tapestry Segment | Percent | Cumulative Percent | U.S. Index |
|---|------------------------------|---------------|--------------------|------------|
| 1 | 19. Milk and Cookies | 17.9% | 17.9% | 808 |
| 2 | 12. Up and Coming Families | 13.5% | 31.4% | 326 |
| 3 | 39. Young and Restless | 9.1% | 40.5% | 613 |
| 4 | 32. Rustbelt Traditions | 8.0% | 48.5% | 331 |
| 5 | 48. Great Expectations | 7.5% | 56.0% | 440 |
| | Subtotal | 56.0% | | |
| 6 | 28. Aspiring Young Families | 7.2% | 63.2% | 307 |
| 7 | 18. Cozy and Comfortable | 5.0% | 68.2% | 226 |
| 8 | 36. Old and Newcomers | 4.9% | 73.1% | 241 |
| 9 | 30. Retirement Communities | 4.7% | 77.8% | 295 |
| 10 | 52. Inner City Tenants | 4.2% | 82.0% | 300 |
| | Subtotal | 26.0% | | |
| 11 | 14. Prosperous Empty Nesters | 4.1% | 86.1% | 195 |
| 12 | 38. Industrious Urban Fringe | 3.6% | 89.7% | 207 |
| 13 | 24. Main Street, USA | 2.6% | 92.3% | 118 |
| 14 | 33. Midlife Junction | 2.2% | 94.5% | 85 |
| 15 | 53. Home Town | 1.5% | 96.0% | 103 |
| | Subtotal | 14.0% | | |
| 16 | 41. Crossroads | 1.4% | 97.4% | 98 |
| 17 | 29. Rustbelt Retirees | 1.2% | 98.6% | 63 |
| 18 | 60. City Dimensions | 0.8% | 99.4% | 92 |
| 19 | 58. NeWest Residents | 0.7% | 100.1% | 76 |
| Only 19 Tapestry Segments represented in TradeArea1 | | | | |
| | Subtotal | 4.1% | | |
| | Total | 100.0% | | 272 |

Table 22
Characteristics of Top Tapestry Segments, LifeMode and Urbanization Groups

| Segment Code | Tapestry Segment Name | LifeMode Group | Urbanization Group | Trade Area 1a | | | Trade Area | | |
|--|--------------------------|----------------------------|-----------------------------------|---------------|-------|---------|------------|-------|--------|
| | | | | Area | COSA | Area 1a | Area | COSA | |
| 12 | Up and Coming Families | <i>Family Portraits</i> | <i>Suburban Periphery I</i> | 0.043 | 0.135 | 0.063 | 843 | 5013 | 31305 |
| 14 | Prosperous Empty Nesters | <i>Senior Styles</i> | <i>Suburban Periphery I</i> | | 0.041 | 0.018 | 0 | 1528 | 8944 |
| 18 | Cozy and Comfortable | <i>Upscale Avenues</i> | <i>Suburban Periphery I</i> | 0.095 | 0.05 | | 1862 | 1863 | 0 |
| 19 | Milk and Cookies | <i>Family Portraits</i> | <i>Metro Cities I</i> | 0.232 | 0.179 | 0.075 | 4547 | 6653 | 37268 |
| 24 | Main Street, USA | <i>Traditional Living</i> | <i>Urban Outskirts I</i> | | 0.026 | | 0 | 969 | 0 |
| 28 | Aspiring Young Families | <i>High Hopes</i> | <i>Metro Cities II</i> | 0.123 | 0.072 | 0.036 | 2411 | 2683 | 17889 |
| 29 | Rustbelt Retirees | <i>Senior Styles</i> | <i>Suburban Periphery II</i> | | 0.012 | 0.021 | 0 | 447 | 10435 |
| 30 | Retirement Communities | <i>Senior Styles</i> | <i>Metro Cities II</i> | | 0.047 | | 0 | 1752 | 0 |
| 32 | Rustbelt Traditions | <i>Traditional Living</i> | <i>Urban Outskirts I</i> | 0.114 | 0.08 | 0.037 | 2234 | 2982 | 18385 |
| 33 | Midlife Junction | <i>Traditional Living</i> | <i>Suburban Periphery II</i> | | 0.022 | | 0 | 820 | 0 |
| 36 | Old and Newcomers | <i>Solo Acts</i> | <i>Metro Cities II</i> | 0.093 | 0.049 | 0.026 | 1823 | 1826 | 12920 |
| 38 | Industrious Urban Fringe | <i>Global Roots</i> | <i>Urban Outskirts I</i> | 0.033 | 0.036 | 0.053 | 647 | 1342 | 26336 |
| 39 | Young and Restless | <i>Solo Acts</i> | <i>Metro Cities II</i> | 0.128 | 0.091 | 0.101 | 2509 | 3391 | 50187 |
| 41 | Crossroads | <i>American Quilt</i> | <i>Small Towns</i> | 0.014 | 0.014 | | 274 | 522 | 0 |
| 48 | Great Expectations | <i>High Hopes</i> | <i>Urban Outskirts I</i> | 0.046 | 0.075 | 0.019 | 902 | 2795 | 9441 |
| 52 | Inner City Tenants | <i>Global Roots</i> | <i>Metro Cities II</i> | 0.051 | 0.042 | 0.037 | 999 | 1565 | 18385 |
| 53 | Hometown | <i>Factories and Farms</i> | <i>Suburban Periphery II</i> | 0.028 | 0.015 | 0.015 | 549 | 559 | 7454 |
| 58 | NeWest Residents | <i>Global Roots</i> | <i>Principal Urban Centers II</i> | | 0.007 | | 0 | 261 | 0 |
| 60 | City Dimensions | <i>Global Roots</i> | <i>Metro Cities II</i> | | 0.008 | | 0 | 298 | 0 |
| GEOGRAPHIC AREA TOTALS | | | | 1.000 | 1.000 | 0.501 | 19598 | 37269 | 496904 |
| SUM OF TOP SEVEN SEGMENTS | | | | | | | 15306 | 25380 | 164475 |
| Percent of Geographic Area Totals | | | | | | | 78.1% | 68.1% | 33.1% |

Table 23
Characteristics of Top Tapestry Segments, Age, Income & Household Type

| Segment Code | Tapestry Segment Name | Median Age (yrs) | Growth Rate | College Degree | Housing Type | Med HH income | Household Type |
|--------------|--------------------------|------------------|-------------|----------------|--------------|---------------|---|
| 12 | Up and Coming Families | 32.6 | 0.046 | 0.20 | 80% SF | 69522 | young affluent families w/young kids |
| 14 | Prosperous Empty Nesters | 47.6 | 0.005 | 0.39 | 77% SF | 63682 | household distribution similar to US |
| 18 | Cozy and Comfortable | 41.7 | 0.005 | | 88% SF | 59287 | married couples w/, w/o kids |
| 19 | Milk and Cookies | 34.1 | | 0.20 | >70% SF | 57170 | half w/chikdren; 1/4 age 45-54 |
| 24 | Main Street, USA | 36.8 | | 0.20 | >60% SF | 50987 | 1/2 married couple; 1/3 single or shared |
| 28 | Aspiring Young Families | 31.1 | 0.011 | | 50% SF | 46275 | 2/3 families; .27 single; .09 shared |
| 29 | Rustbelt Retirees | 44.2 | slow | 0.20 | 84% SF | 46909 | 1/3 householders 65+, .17 are veterans |
| 30 | Retirement Communities | 50.3 | slow | 0.35 | 57% MF | 46251 | 44% household 65+ |
| 32 | Rustbelt Traditions | 35.9 | slow | 0.15 | >70% SF | 42337 | married-cple families, single parents+alone |
| 33 | Midlife Junction | 37.0 | | US | 66% SF | 42694 | 50% married couples, 31% singles |
| 36 | Old and Newcomers | 36.3 | slow | > US | 60% MF | 39234 | more singles & shared HH than families |
| 38 | Industrious Urban Fringe | 29.0 | | | most SF | 40400 | 54% married couples; 17% single parents |
| 39 | Young and Restless | 28.9 | | 0.36 | 85% MF | 39765 | 58% single or shared; 23% HH w/kids |
| 41 | Crossroads | 33.6 | 0.014 | < US | >50% MH | 37145 | 50% HH younger than 45 yrs |
| 48 | Great Expectations | 33.1 | | 0.18 | >50% SF | 35406 | beginning careers or family life |
| 52 | Inner City Tenants | 28.8 | 0.006 | 0.05 | >50% MF | 30873 | singls, marrd coupls, singl parents, shared |
| 53 | Hometown | 33.8 | | 0.08 | 73% SF | 29688 | 1/3 65+; two generation-families; |
| 58 | NeWest Residents | 27.3 | | < US | >50% MF | 26983 | married couples w/no kids |
| 60 | City Dimensions | 29.5 | | 0.09 | >50% MF | 26283 | singls, marrd coupls, singl parents, shared |

Table 24
Characteristics of Top Tapestry Segments, Race/Ethnicity, Diversity and Description

| Segment Code | Tapestry Segment Name | Race/Ethnicity | Tenure (Pct Owner) | Age of Homes | Diversity | Comment |
|--------------|--------------------------|----------------|--------------------|--------------|--------------|---|
| 12 | Up and Coming Families | Mostly white | 0.80 | <10 yrs | increasing | mix of Gen-Xers and Baby Boomers |
| 14 | Prosperous Empty Nesters | Mostly white | 0.77 | <34 yrs | low | .6 age 55+; .4 married couples/no kids at home |
| 18 | Cozy and Comfortable | Mostly white | 0.84 | <44 yrs | | middle aged married couples in SF homes, older nhoods |
| 19 | Milk and Cookies | Mix of HH | high | <30 yrs | same as US | young affluent married couples starting families |
| 24 | Main Street, USA | Mix of HH | 0.62 | >44 yrs | less than US | mix of household types similar to US |
| 28 | Aspiring Young Families | Mix of HH | 0.47 | | more than US | young, startup families, married couples w/ or w/o kids |
| 29 | Rustbelt Retirees | Mostly white | high | <44 yrs | low | married couples w/no kids or singles living alone |
| 30 | Retirement Communities | Mostly white | 0.53 | <54 yrs | low | single seniors who live alone; married couples no kids |
| 32 | Rustbelt Traditions | Mostly white | 0.70 | <54 yrs | low | mix of married couple families, single parents, singles alone |
| 33 | Midlife Junction | Mostly white | 0.62 | | low | mix of family types & Singles living alone or sharing |
| 36 | Old and Newcomers | White+Mix | 0.40 | >30 yrs | same as US | residents beginning careers or retiring |
| 38 | Industrious Urban Fringe | 61% Hispanic | 0.62 | | high | family is central; > 50% have kids; multi-gen HH common |
| 39 | Young and Restless | 56% white | low | <30 yrs | high | young on-the-go population, career-oriented |
| 41 | Crossroads | 20% Hispanic | 0.69 | <44 yrs | high | married couples w/ & w/out kids and single parents |
| 48 | Great Expectations | very diverse | | <54 yrs | same as US | young singles living alone and married couple families |
| 52 | Inner City Tenants | very diverse | 0.20 | > 34 yrs | more than US | microcosm of urban diversity: white, black and Hispanics |
| 53 | Hometown | 72% w, 15% b | 0.54 | >44 yrs | less than US | mix of married-couple families, singles alone, single parent |
| 58 | NeWest Residents | 40% white | 0.17 | <34 yrs | high | family oriented mostly Hispanic population |
| 60 | City Dimensions | <50% white | | >54 yrs | high | mostly young, ethnically diverse, income supplemented |

Table 25
Summary of Building Permits Issued: 2008-2013

| B_Permits | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | Totals |
|--------------------------------|-----------|------------|------------|------------|------------|-----------|------------|
| FOR EXISTING STRUCTURES | | | | | | | |
| Residential | 15 | 46 | 35 | 36 | 39 | 13 | 184 |
| Retail | 30 | 24 | 26 | 18 | 16 | 15 | 129 |
| Non-Retail | 20 | 45 | 51 | 36 | 36 | 18 | 206 |
| Subtotals | 65 | 115 | 112 | 90 | 91 | 46 | 519 |
| FOR NEW STRUCTURES | | | | | | | |
| Residential | 13 | 17 | 27 | 24 | 11 | 7 | 99 |
| Retail | 3 | 8 | 9 | 19 | 8 | 0 | 47 |
| Non-Retail | 18 | 27 | 27 | 25 | 15 | 9 | 121 |
| Subtotals | 34 | 52 | 63 | 68 | 34 | 16 | 267 |
| Trade Area | 99 | 167 | 175 | 158 | 125 | 62 | 786 |

Note: the source for all Building Permit Tables (Tables 25-27) is: City of San Antonio Development Services Department; Wendell Davis & Associates.

Table 26
Building Permits Issued for Existing Structures: 2008-2013

| Building Permits | | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | Totals |
|--------------------------------|---------------------------|-----------|------------|------------|-----------|-----------|-----------|------------|
| FOR EXISTING STRUCTURES | | | | | | | | |
| Residential | Residential | 15 | 46 | 35 | 36 | 39 | 13 | 184 |
| | Subtotals | 15 | 46 | 35 | 36 | 39 | 13 | 184 |
| Retail | Bars, Taverns | 0 | 2 | 4 | 0 | 0 | 0 | 6 |
| Retail | Retail | 9 | 6 | 7 | 7 | 7 | 3 | 39 |
| Retail | Services | 21 | 16 | 15 | 11 | 9 | 12 | 84 |
| | Subtotals | 30 | 24 | 26 | 18 | 16 | 15 | 129 |
| Non-Retail | Amusements | 0 | 1 | 2 | 0 | 0 | 1 | 4 |
| Non-Retail | Animal Related | 0 | 0 | 0 | 1 | 0 | 0 | 1 |
| Non-Retail | Auto Related | 1 | 2 | 4 | 4 | 0 | 0 | 11 |
| Non-Retail | Church | 0 | 3 | 2 | 2 | 2 | 0 | 9 |
| Non-Retail | Industrial | 0 | 0 | 1 | 1 | 0 | 0 | 2 |
| Non-Retail | Manufacturing | 0 | 1 | 0 | 0 | 0 | 1 | 2 |
| Non-Retail | Office Warehouse | 11 | 13 | 17 | 13 | 13 | 4 | 71 |
| Non-Retail | Recreation | 0 | 0 | 2 | 1 | 0 | 0 | 3 |
| Non-Retail | Schools | 2 | 10 | 8 | 6 | 4 | 1 | 31 |
| Non-Retail | Social | 1 | 0 | 0 | 0 | 0 | 0 | 1 |
| Non-Retail | Storage | 1 | 0 | 0 | 0 | 0 | 0 | 1 |
| Non-Retail | Utilities (incl attenas | 2 | 10 | 6 | 5 | 8 | 6 | 37 |
| Non-Retail | Warehouse-Showroom | 2 | 0 | 6 | 1 | 6 | 3 | 18 |
| Non-Retail | Warehouse - Office | 0 | 5 | 3 | 2 | 3 | 2 | 15 |
| | Subtotals | 20 | 45 | 51 | 36 | 36 | 18 | 206 |
| | Subtotals Existing | 65 | 115 | 112 | 90 | 91 | 46 | 519 |

Table 27
Building Permits Issued for New Structures: 2008-2013

| Building Permits | | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | Totals |
|---------------------------|---------------------------|-----------|------------|------------|------------|------------|-----------|------------|
| FOR NEW STRUCTURES | | | | | | | | |
| Residential | Residential | 13 | 17 | 27 | 24 | 11 | 7 | 99 |
| | Subtotals | 13 | 17 | 27 | 24 | 11 | 7 | 99 |
| Retail | Bars, Taverns | 0 | 0 | 0 | 1 | 0 | 0 | 1 |
| Retail | Food Related | 0 | 0 | 0 | 1 | 1 | 0 | 2 |
| Retail | Retail | 0 | 2 | 4 | 3 | 1 | 0 | 10 |
| Retail | Services | 3 | 6 | 5 | 14 | 6 | 0 | 34 |
| | Subtotals | 3 | 8 | 9 | 19 | 8 | 0 | 47 |
| Non-Retail | Amusements | 0 | 1 | 1 | 1 | 0 | 0 | 3 |
| Non-Retail | Animal Related | 0 | 1 | 0 | 0 | 0 | 0 | 1 |
| Non-Retail | Auto Related | 2 | 0 | 1 | 3 | 2 | 2 | 10 |
| Non-Retail | Church | 1 | 0 | 1 | 1 | 0 | 0 | 3 |
| Non-Retail | Manufacturing | 1 | 2 | 3 | 1 | 0 | 1 | 8 |
| Non-Retail | Office Warehouse | 5 | 10 | 6 | 7 | 4 | 1 | 33 |
| Non-Retail | Printers | 0 | 0 | 0 | 0 | 1 | 0 | 1 |
| Non-Retail | Recreation | 1 | 1 | 0 | 3 | 1 | 1 | 7 |
| Non-Retail | Rentals | 0 | 0 | 0 | 0 | 1 | 0 | 1 |
| Non-Retail | Schools | 5 | 5 | 2 | 0 | 0 | 1 | 13 |
| Non-Retail | Social | 0 | 0 | 1 | 0 | 0 | 0 | 1 |
| Non-Retail | Storage | 1 | 0 | 0 | 1 | 0 | 0 | 2 |
| Non-Retail | Utilities (incl antennas) | 0 | 0 | 1 | 3 | 1 | 0 | 5 |
| Non-Retail | Warehouse-Showroom | 2 | 6 | 9 | 3 | 4 | 1 | 25 |
| Non-Retail | Warehouse - Office | 0 | 1 | 2 | 2 | 1 | 2 | 8 |
| | Subtotals | 18 | 27 | 27 | 25 | 15 | 9 | 121 |
| | Subtotals New | 34 | 52 | 63 | 68 | 34 | 16 | 267 |
| | Trade Area Totals | 99 | 167 | 175 | 158 | 125 | 62 | 786 |

Table 28
Zoning Summary for the Trade Area

| General Zoning | Zoning Description | Number Parcels | Acres | Pct of Tot Acres |
|--------------------------|---------------------------------|----------------|-----------------|------------------|
| BP | Business Park | 3 | 85.27 | 0.6% |
| C1 | Commercial | 1528 | 2574.41 | 16.8% |
| ED | Entertainment District | 11 | 224.18 | 1.5% |
| G | Golf Course | 6 | 135.45 | 0.9% |
| I1 | Industrial | 999 | 2545.20 | 16.6% |
| L | Light Industrial | 19 | 49.69 | 0.3% |
| MF | Multi-Family | 696 | 563.60 | 3.7% |
| MH | Manufactured Housing | 46 | 70.45 | 0.5% |
| NP | Neighborhood Preservation | 859 | 296.48 | 1.9% |
| O1 | Office low rise | 4 | 4.38 | 0.03% |
| O2 | High Rise Office | 88 | 83.75 | 0.5% |
| OCL | Outside City Limits (no zoning) | 1842 | 739.44 | 4.8% |
| PUD | Planned Unit Development | 21 | 117.08 | 0.8% |
| QD | Quarry District | 1 | 26.07 | 0.2% |
| R20 | Residential Single-Family | 25743 | 7435.34 | 48.5% |
| RM4 | Residential Mixed | 2448 | 359.64 | 2.3% |
| RP | Resource Protection | 1 | 8.50 | 0.1% |
| Trade Area Totals | | 34315 | 15318.93 | 100.0% |

Table 29
Zoning Summary for the Corridor

| UDC_Zoning | Zoning Description | Number Parcels | Acres | Pct of Tot Acres |
|---------------------------------|----------------------------------|----------------|---------------|------------------|
| C1 | Commercial | 268 | 355.93 | 65.3% |
| C1NA | Commercial - Non-Alcohol | 21 | 16.88 | 3.1% |
| C3R | Commercial - Restrictive Alcohol | 17 | 10.04 | 1.8% |
| ED | Entertainment | 1 | 1.37 | 0.3% |
| O2 | High-Rise Office | 4 | 1.32 | 0.2% |
| I1 | Industrial | 39 | 129.95 | 23.8% |
| L-S | Light Industrial | 4 | 8.88 | 1.6% |
| MF33 | Residential Multi-Family | 6 | 16.94 | 3.1% |
| R6 | Residential Single-Family | 6 | 3.80 | 0.7% |
| Grand Total NEC Corridor | | 366 | 545.11 | 100.0% |

Note: The source for the Zoning Tables (Tables 28-29) is: Bexar Appraisal District 2012 parcel files; City of San Antonio Department of Planning and Community Development; Wendell Davis & Associates.

**Table 30
Land Uses and Property Values in the Trade Area**

| State_Code | Land Use | Number Parcels | GIS Acres | Pct of Total | Land_Value | Impr_Value | Total_Value | Pct of Tot Value |
|-----------------------------|---------------|-------------------|-----------|-----------------|-----------------|-----------------|-----------------|---------------------|
| A1 | Single Family | 29506 | 6039.50 | 39.8% | \$708,909,418 | \$2,829,520,217 | \$3,538,429,635 | 62.1% |
| A2 | SF-Attached | 22 | 12.74 | 0.1% | \$545,960 | \$194,490 | \$740,450 | 0.0% |
| B1 | Duplex | 457 | 96.56 | 0.6% | \$10,805,500 | \$46,838,478 | \$57,643,978 | 1.0% |
| B2 | Multi-Family | 73 | 501.47 | 3.3% | \$64,520,900 | \$365,177,733 | \$429,698,633 | 7.5% |
| B6 | Manuf | 28 | 6.48 | 0.0% | \$654,750 | \$2,695,500 | \$3,350,250 | 0.1% |
| C1 | Vacant Land | 1097 | 2162.84 | 14.3% | \$80,115,020 | \$0 | \$80,115,020 | 1.4% |
| D1 | Vacant Land | 19 | 371.50 | 2.4% | \$19,549,980 | \$0 | \$19,549,980 | 0.3% |
| D2 | Vacant Land | 2 | 53.22 | 0.4% | \$1,502,350 | \$3,760 | \$1,506,110 | 0.0% |
| E1 | Vacant Land | 82 | 1055.23 | 7.0% | \$18,759,065 | \$355,330 | \$19,114,395 | 0.3% |
| E3 | Vacant Land | 2 | 88.06 | 0.6% | \$1,970,080 | \$55,140 | \$2,025,220 | 0.0% |
| F1 | Commercial | 1605 | 3559.93 | 23.5% | \$456,251,611 | \$1,016,558,648 | \$1,472,810,259 | 25.9% |
| F2 | Lt Industrial | 37 | 273.06 | 1.8% | \$10,400,040 | \$37,213,945 | \$47,613,985 | 0.8% |
| F3 | Industrial | 41 | 83.00 | 0.5% | \$7,021,698 | \$340,038 | \$7,361,736 | 0.1% |
| G3 | Quarry | 8 | 280.04 | 1.8% | \$2,885,520 | \$0 | \$2,885,520 | 0.1% |
| J2-J7 | Utilities | 15 | 31.46 | 0.2% | \$1,251,450 | \$1,229,760 | \$2,481,210 | 0.0% |
| M1 | MH | 1 | 0.25 | 0.0% | \$11,640 | \$5,090 | \$16,730 | 0.0% |
| O1 | Vac Res Lots | 20 | 4.24 | 0.0% | \$467,000 | \$122,270 | \$589,270 | 0.0% |
| X | Exempt | 156 | 472.69 | 3.1% | \$5,375,260 | \$2,662,580 | \$8,037,840 | 0.1% |
| Z0 | Public Owned | 14 | 14.10 | 0.1% | \$37,370 | \$234,350 | \$271,720 | 0.0% |
| Trade Area Totals | | 33185 | 15168.90 | 100.0% | \$1,391,034,612 | \$4,303,207,329 | \$5,694,241,941 | 100.0% |
| Subtotal Vacant Land | | 1202 | 3730.85 | 24.6% | \$121,896,495 | \$414,230 | \$122,310,725 | 2.1% |

**Table 31
Land Uses and Property Values in the Corridor**

| State_Code | Land Use Description | Number Parcels | Acres | Pct_of _Total | Land_Value | Impr_Value | Total_Value | Pct_of_ Total |
|--|---------------------------|-------------------|--------|------------------|--------------|---------------|---------------|------------------|
| B2 | Multi Family - Apartments | 4 | 22.62 | 4.1% | \$2,353,940 | \$13,896,060 | \$16,250,000 | 7.9% |
| C1 | Vacant Lots | 37 | 79.42 | 14.3% | \$4,143,030 | \$0 | \$4,143,030 | 2.0% |
| E1 | Vacant Land | 4 | 64.80 | 11.6% | \$669,530 | \$0 | \$669,530 | 0.3% |
| F1 | Commercial Uses | 251 | 385.46 | 69.2% | \$77,965,860 | \$106,774,656 | \$184,740,516 | 89.4% |
| F2 | Light Industrial Uses | 1 | 0.22 | 0.0% | \$27,970 | \$36,347 | \$64,317 | 0.0% |
| F3 | Industrial | 3 | 1.66 | 0.3% | \$258,110 | \$300 | \$258,410 | 0.1% |
| J7 | Utilities - Time Warner | 1 | 0.90 | 0.2% | \$146,710 | \$70,130 | \$216,840 | 0.1% |
| X | Exempt Uses | 2 | 1.43 | 0.3% | \$150,150 | \$40,800 | \$190,950 | 0.1% |
| Z0 | Public - Owned | 1 | 0.31 | 0.1% | \$0 | \$0 | \$0 | 0.0% |
| CORRIDOR TOTALS | | 304 | 556.82 | 100.0% | \$85,715,300 | \$120,818,293 | \$206,533,593 | 100.0% |
| Vacant Lots and vacant land total 41 parcels, 133.2 net (legal) acres (30.7%), 144.2 gross (GIS) acres (25.9%), and \$4,812,560 total valuation. | | | | | | | | |

Note: The source for the Land Use Tables (Tables 30-31) is: Bexar County Appraisal District; Wendell Davis & Associates.

**Table 32
Trends in North East ISD Kindergarten Enrollment in Trade Area Schools**

| Elementary | 2002-03 | 2003-04 | 2004-05 | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | 2011-12 | % Change 02/03-11/12 |
|----------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|----------------------|
| Serna | 102 | 87 | 75 | 91 | 91 | 91 | 61 | 79 | 78 | 78 | -31% |
| El Dorado | 79 | 88 | 106 | 82 | 98 | 100 | 112 | 107 | 119 | 93 | 15% |
| Clear Spring | 74 | 85 | 78 | 86 | 88 | 82 | 76 | 80 | 81 | 93 | 20% |
| Stahl | 171 | 154 | 175 | 136 | 157 | 147 | 121 | 125 | 148 | 143 | -20% |
| Oak Grove | 67 | 64 | 79 | 68 | 69 | 77 | 56 | 64 | 76 | 58 | -16% |
| Northern Hills | 117 | 123 | 133 | 109 | 93 | 124 | 109 | 109 | 111 | 115 | -2% |
| Wetmore | 176 | 159 | 161 | 149 | 139 | 130 | 122 | 128 | 143 | 115 | -53% |
| Longs Creek | 163 | 162 | 166 | 155 | 130 | 156 | 115 | 114 | 126 | 111 | -47% |
| Woodstone | 180 | 189 | 184 | 134 | 113 | 127 | 142 | 139 | 146 | 123 | -46% |
| Redland Oaks | 75 | 88 | 137 | 101 | 95 | 87 | 78 | 60 | 69 | 61 | -23% |
| Walzem | 123 | 115 | 115 | 96 | 102 | 98 | 100 | 135 | 117 | 126 | 2% |
| Regency Place | 77 | 86 | 90 | 88 | 98 | 96 | 93 | 102 | 95 | 97 | 21% |
| Wilshire | 55 | 84 | 77 | 66 | 51 | 49 | 62 | 60 | 37 | 43 | -28% |
| East Terrell Hills | 60 | 68 | 79 | 115 | 99 | 105 | 94 | 86 | 94 | 108 | 44% |
| Windcrest | 89 | 80 | 84 | 76 | 85 | 112 | 116 | 117 | 96 | 113 | 21% |
| NEISD TOTALS | 4132 | 4355 | 4503 | 4736 | 4745 | 4646 | 4629 | 4898 | 4839 | 4846 | 15% |
| Trade Area 1a | 493 | 478 | 513 | 463 | 503 | 497 | 426 | 455 | 502 | 465 | -6% |
| Trade Area | 1608 | 1154 | 1226 | 1089 | 1005 | 1084 | 1031 | 1050 | 1034 | 1012 | -59% |

Note: The source for the Kindergarten Enrollment Table is: TEA AEIS Reports Compiled by Wendell Davis & Associates.

Table 33
Traffic Counts in the Corridor and Comparable Corridors

NEC Corridor:

| MajorStreet | Location | MinorStreet | Direction | Count Date | ADT Volume | Combined ADT Volume | Year of Count | Street Width | Speed Limit | Lane Configuration |
|------------------|----------|----------------|-----------|------------|------------|---------------------|---------------|--------------|-------------|---------------------|
| Nacogdoches Rd | W of | Aspen View | EB/WB | 10/30/2002 | 17528 | 17528 | (2002) | 64 | 40 | Five Lane |
| Nacogdoches Rd | S of | Naco-Perrin | NB/SB | 10/30/2007 | 16767 | 16767 | (2007) | 58 | 40 | Four Lane Divided |
| Nacogdoches Rd | W of | O'Connor Rd | EB/WB | 3/2/2009 | 12228 | 12228 | (2009) | 65 | 45 | Five Lane Undivided |
| Nacogdoches Rd | E of | O'Connor Rd | EB/WB | 3/2/2009 | 14302 | 14302 | (2009) | 65 | 45 | Five Lane Undivided |
| Nacogdoches Rd | S of | Naco-Perrin | NB/SB | 9/10/2009 | 8293 | 8293 | (2009) | 60 | 40 | Four Lane Divided |
| Naco-Perrin | E of | Nacogdoches Rd | EB/WB | 2/2/2009 | 9448 | 9448 | (2009) | 62 | | Four Lane Divided |
| Naco-Perrin | E of | Nacogdoches Rd | EB/WB | 2/18/2010 | 4373 | 13821 | (2010) | 63 | 35 | Six Lane Divided |
| O'Connor Rd | S of | Nacogdoches Rd | NB/SB | 1/28/2008 | 20211 | 20211 | (2008) | 70 | 45 | Five Lane |
| O'Connor Rd | S of | Nacogdoches Rd | NB/SB | 3/2/2009 | 11855 | 11855 | (2009) | 70 | 40 | Four Lane Undivided |
| O'Connor Rd | N of | Nacogdoches Rd | NB/SB | 3/2/2009 | 8180 | 8180 | (2009) | 54 | 40 | Four Lane Undivided |
| O'Connor Rd | E of | Nacogdoches Rd | EB/WB | 4/13/2010 | 11832 | 11832 | (2010) | 45 | 40 | Four Lane Undivided |
| Perrin Beitel Rd | S of | Bretton Ridge | NB/SB | 1/11/2006 | 18601 | 18601 | (2006) | 64 | 45 | Five Lane |
| Perrin Beitel Rd | S of | Clear Spring | NB/SB | 6/22/2006 | 17869 | 17869 | (2006) | 64 | 40 | Five Lane |
| Perrin Beitel Rd | S of | Loop 410 | NB/SB | 1/28/2008 | 18141 | 26678 | (2008) | 56 | 40 | Five Lane |
| Perrin-Beitel Rd | S of | Loop 410 | NB/SB | 8/30/2011 | 8537 | 8537 | (2011) | 55 | 40 | Five Lane |
| Thousand Oaks | W of | Schertz | EB/WB | 10/29/2007 | 20619 | 20619 | (2007) | 84 | 35 | Four Lane Divided |

Comparable Corridors:

| MajorStreet | Location | MinorStreet | Direction | Count Date | Combined ADT Volume | Year of Count | Street Width | Speed Limit | Lane Configuration |
|---------------|----------|-------------------|-----------|------------|---------------------|---------------|--------------|-------------|---------------------|
| Austin Hwy | N of | Walzem Rd | NB/SB | 3/7/2007 | 19900 | (2007) | 106 | 45 | Five Lane |
| Babcock Rd | S of | Callaghan Rd | NB/SB | 2/24/2009 | 35020 | (2009) | 88 | 40 | Five Lane |
| Babcock Rd | S of | De Zavala | NB/SB | 4/10/2006 | 26227 | (2006) | 60 | 45 | Five Lane |
| Babcock Rd | W of | Fredericksburg Rd | EB/WB | 2/11/2008 | 16603 | (2008) | 44 | 30 | Two Lane |
| Blanco Rd | S of | Basse Rd | NB/SB | 5/4/2009 | 18685 | (2009) | 44 | 35 | Four Lane Undivided |
| Blanco Rd | S of | Fresno | NB/SB | 4/17/2006 | 20672 | (2006) | 44 | 35 | Four Lane Undivided |
| Blanco Rd | S of | Oblate | NB/SB | 7/30/2007 | 18008 | (2007) | 56 | 35 | Five Lane |
| Culebra Rd | W of | 24th St | EB/WB | 7/11/2006 | 28112 | (2006) | 62 | 40 | Five Lane |
| Culebra Rd | E of | 36th | EB/WB | 6/19/2012 | 22331 | (2012) | 63 | 40 | Five Lane Undivided |
| Culebra Rd | E of | Canterbury | EB/WB | 2/9/2011 | 22244 | (2011) | 63 | 40 | Five Lane |
| Culebra Rd | E of | Zarzamora N | EB/WB | 3/12/2007 | 29579 | (2007) | 97 | 40 | Seven Lane |
| San Pedro | N of | Hildebrand | NB/SB | 6/10/2009 | 16328 | (2009) | 54 | 35 | Four Lane Undivided |
| San Pedro | N of | Thames | NB/SB | 2/9/2010 | 27874 | (2010) | 87 | 40 | Seven Lane |
| Vance Jackson | S of | Colony | NB/SB | 2/20/2007 | 15707 | (2007) | 36 | 35 | Three Lane |
| Vance Jackson | N of | De Zavala | NB/SB | 6/20/2011 | 11695 | (2011) | 62 | 40 | Five Lane |
| Vance Jackson | S of | Orsinger | NB/SB | 2/15/2011 | 15245 | (2011) | 38 | 35 | Two Lane |
| Walzem Rd | E of | Gibbs-Sprawl | EB | 5/14/2012 | 22886 | (2012) | 68 | 45 | Five Lane |

Source: City of San Antonio Public Works Department Traffic Division; Wendell Davis & Associates.

Table 34
Physical Condition of Buildings in the Trade Area

| State_ Code | Land Use | Excellent | Above Average | Average | Below Average | Well Below Average | Low Cost | Special Class | Total ea Class |
|-----------------------------|----------------|-------------|------------------|--------------|------------------|--------------------------|-------------|--------------------------|-------------------|
| A1 | Single Family | 204 | 4676 | 24270 | 2 | 68 | 3 | 6 | 29229 |
| A2 | Mobile Homes | 0 | 0 | 15 | 0 | 0 | 3 | 0 | 18 |
| B1 | Duplex | 0 | 134 | 295 | 0 | 0 | 0 | 0 | 429 |
| B2 | Multi-Family | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| B6 | Mfrd Homes | 0 | 12 | 12 | 0 | 0 | 0 | 0 | 24 |
| C1 | Vacant Land | 0 | 0 | 19 | 0 | 1 | 0 | 0 | 20 |
| E1 | Vacant Land | 0 | 0 | 4 | 0 | 0 | 0 | 0 | 4 |
| F1 | Commercial | 0 | 2 | 13 | 671 | 200 | 0 | 0 | 886 |
| F2 | Lt. Industrial | 0 | 0 | 0 | 14 | 1 | 0 | 198 | 213 |
| F3 | Industrial | 0 | 0 | 0 | 0 | 0 | 0 | 12 | 12 |
| X | Exempt Uses | 0 | 3 | 23 | 1 | 2 | 0 | 0 | 29 |
| Z0 | Public Owned | 0 | 0 | 0 | 3 | 2 | 0 | 0 | 5 |
| Trade Area Subtotals | | 204 | 4827 | 24651 | 691 | 274 | 6 | 216 | 30869 |
| Percent of Total | | 0.7% | 15.6% | 79.9% | 2.2% | 0.9% | 0.0% | 0.7% | 100.0% |
| | | | | | | | | 971 properties below avg | |
| | | | | | | | | 3.1% of total | |

Source: Bexar Appraisal District 2012 Improvement Details; analysis by Wendell Davis & Associates.

Table 35
Retail Marketplace Profile in the Trade Area

| Industry Summary | Industry Group | Demand (Retail Potential) | Supply (Retail Sales) | Leakage/ Surplus Retail Gap | Leakage/ Surplus Factor | Nbr of Estabs |
|---|-------------------|------------------------------|--------------------------|-----------------------------------|-------------------------------|------------------|
| Total Retail Trade and Food & Drink | 44-45,722 | \$955,479,212 | \$970,083,980 | (\$14,604,768) | (0.8) | 804 |
| Total Retail Trade | 44-45 | \$859,069,324 | \$866,705,559 | (\$7,636,235) | (0.4) | 690 |
| Total Food & Drink | 722 | \$96,409,887 | \$103,378,421 | (\$6,968,533) | (3.5) | 114 |
| Industry Group | | | | | | |
| Motor Vehicle & Parts Dealers | 441 | \$168,062,887 | \$101,403,473 | \$66,659,414 | 24.7 | 68 |
| Furniture & Home Furnishings Stores | 442 | \$19,979,063 | \$27,192,097 | (\$7,213,035) | (15.3) | 53 |
| Electronics & Appliance Stores | 4431 | \$25,176,981 | \$18,262,277 | \$6,914,704 | 15.9 | 38 |
| Bldg Materials, Garden Equip. & Supply Stores | 444 | \$26,818,030 | \$54,333,606 | (\$27,515,576) | (33.9) | 49 |
| Food & Beverage Stores | 445 | \$152,860,598 | \$160,877,502 | (\$8,016,904) | (2.6) | 72 |
| Health & Personal Care Stores | 4,464,461 | \$64,106,215 | \$122,139,027 | (\$58,032,812) | (31.2) | 38 |
| Gasoline Stations | 4,474,471 | \$100,684,198 | \$283,365,370 | (\$182,681,172) | (47.6) | 14 |
| Clothing & Clothing Accessories Stores | 448 | \$53,189,543 | \$13,864,954 | \$39,324,589 | 58.6 | 66 |
| Sporting Goods, Hobby, Book & Music Stores | 451 | \$22,243,666 | \$22,249,765 | (\$6,099) | 0.0 | 52 |
| General Merchandise Stores | 452 | \$153,784,315 | \$5,261,241 | \$148,523,073 | 93.4 | 9 |
| Miscellaneous Store Retailers | 453 | \$23,111,401 | \$31,458,420 | (\$8,347,019) | (15.3) | 185 |
| Nonstore Retailers | 454 | \$49,052,427 | \$26,297,827 | \$22,754,601 | 30.2 | 48 |
| Food Services & Drinking Places | 722 | \$96,409,887 | \$103,378,421 | (\$6,968,533) | (3.5) | 114 |

Table 36
Industry Groups with Significant Surplus

| Industry Summary | Industry Group | Demand (Retail Potential) | Supply (Retail Sales) | Surplus Retail Gap | Surplus Factor | Nbr of Estabs |
|-------------------------------------|----------------|---------------------------|-----------------------|--------------------|----------------|---------------|
| Auto Parts, Accessories & Tires | 4413 | \$13,961,336 | \$66,889,389 | (52,928,053.00) | (65.5) | 28 |
| Bldg Material & Supplies | 4441 | \$23,775,151 | \$53,049,556 | (29,274,404.69) | (38.1) | 46 |
| Drinking Places - Alcoholic Bev | 7224 | \$6,552,718 | \$23,907,139 | (17,354,421.49) | (57.0) | 32 |
| Furniture Stores | 4421 | \$12,047,781 | \$20,644,764 | (8,596,983.17) | (26.3) | 28 |
| Other Miscellaneous Store Retailers | 4539 | \$12,050,924 | \$18,028,668 | (5,977,744.37) | (19.9) | 94 |
| Vending Machine Operators | 4542 | \$2,965,093 | \$7,640,435 | (4,675,342.18) | (44.1) | 18 |
| Florists | 4531 | \$926,456 | \$3,050,986 | (2,124,530.23) | (53.4) | 11 |
| Total Surplus | | \$72,279,459 | \$193,210,937 | (120,931,479.13) | | 257 |

Table 37
Industry Groups with Significant Leakage

| Industry Summary | Industry Group | Demand (Retail Potential) | Supply (Retail Sales) | Leakage Retail Gap | Leakage Factor | Nbr of Estabs |
|---------------------------|----------------|---------------------------|-----------------------|--------------------|----------------|---------------|
| Other Gen Mdse Stores | 4529 | \$97,811,648 | \$2,752,901 | \$95,058,747 | 94.5 | 6 |
| Department Stores | 4521 | \$55,972,667 | \$2,508,340 | \$53,464,327 | 91.4 | 3 |
| Ltd-Service Eating Places | 7222 | \$49,395,513 | \$39,931,762 | \$9,463,752 | 10.6 | 36 |
| Clothing Stores | 4481 | \$38,760,054 | \$7,722,191 | \$31,037,863 | 66.8 | 35 |
| Jewelry/Luggage/Leather | 4483 | \$7,893,038 | \$5,186,997 | \$2,706,041 | 20.7 | 27 |
| Shoe Stores | 4482 | \$6,536,451 | \$955,766 | \$5,580,685 | 74.5 | 4 |
| Book, Periodicals & Music | 4512 | \$5,501,054 | \$889,724 | \$4,611,330 | 72.2 | 14 |
| Lawn & Garden | 4442 | \$3,042,879 | \$1,284,050 | \$1,758,829 | 40.6 | 3 |
| Total Leakage | | \$264,913,304 | \$61,231,731 | \$203,681,573 | | 128 |

Note: the source for the Retail Tables (Tables 35-37) is: Environmental Systems Research Institute Business Analyst Online (ESRI BAO); Wendell Davis & Associates.

**Table 38
Recommended Retail Mix**

| Example Retailers | Industry Group Description | Industry Code | Industry Group | Typ Size Sq Ft (sm) | Assumed Median SqFt | Typ Size SqFt (reg) | Sales/SqFt (lo) Taxable | Taxable Sales Per Store** | Tot Leakage by Industry Group | |
|--|---|---------------|----------------|---------------------|---------------------|---------------------|-------------------------|---------------------------|-------------------------------|----------------------|
| 99 Cents Only | Discount Stores | 452910 | 4529 | 16000 | 16000 | 30000 | 159 | \$2,900,160 | | |
| Family Dollar Stores | Discount Stores | 452910 | 4529 | 11000 | 11000 | 9500 | 139 | \$1,743,060 | | |
| Wal-Mart Stores | Discount Stores | 452910 | 4529 | 102000 | 129000 | 187000 | 375 | \$55,147,500 | | |
| | | | | | | | | \$59,790,720 | \$97,811,648 | |
| | Discount Stores Subtotal es Subtotal | | | | | | | | | |
| Belk Inc | Department Stores | 452110 | 4521 | 50000 | 50000 | 80000 | 159 | \$9,063,000 | | |
| Stein Mart | Department Stores | 452110 | 4521 | 37000 | 37000 | 37000 | 178 | \$7,508,040 | | |
| | | | | | | | | \$16,571,040 | \$55,972,667 | |
| | Department Stores Subtotal | | | | | | | | | |
| Burlington Coat Factory or Dress Barn | Apparel Stores, General | 448000 | 4480 | 18000 | 18000 | 207000 | 159 | \$3,262,680 | | |
| Old Navy | Apparel Stores, General | 448000 | 4480 | 2750 | 2750 | 8585 | 468 | \$1,467,180 | | |
| Ross, Marshalls or TJ Maxx | Apparel Stores, General | 448000 | 4480 | 20000 | 20000 | 35000 | 418 | \$9,530,400 | | |
| Gymboree | Apparel Stores, Children's | 448130 | 4481 | 1500 | 1500 | 3000 | 529 | \$904,590 | | |
| Casual Male - Big & Tall | Apparel Stores, Men's | 448110 | 4481 | 3300 | 3300 | 3300 | 279 | \$1,049,598 | | |
| Men's Wearhouse | Apparel Stores, Men's | 448110 | 4481 | 5000 | 5000 | 6000 | 279 | \$1,590,300 | | |
| Bebe | Apparel Stores, Women's | 448120 | 4481 | 2200 | 2200 | 3800 | 255 | \$639,540 | | |
| Mothers Work | Apparel Stores, Women's | 448120 | 4481 | 1400 | 1400 | 1600 | 255 | \$406,980 | | |
| Talbots | Apparel Stores, Women's | 448120 | 4481 | 3500 | 3500 | 6500 | 255 | \$1,017,450 | | |
| | | | | | | | | \$19,868,718 | \$31,037,863 | |
| | Apparel Stores Subtotal | | | | | | | | | |
| Famous Footwear and/or Naturalizer | Shoes & Accessories Stores | 448210 | 4482 | 1200 | 1200 | 7000 | 265 | \$362,520 | | |
| Foot Locker, Champs Sports or Footaction | Shoes & Accessories Stores | 448210 | 4482 | 1500 | 1500 | 4000 | 176 | \$300,960 | | |
| Rack Room | Shoes & Accessories Stores | 448210 | 4482 | 4250 | 4250 | | 185 | \$896,325 | | |
| | | | | | | | | \$1,559,805 | \$5,580,685 | |
| | Shoe Stores Subtotal | | | | | | | | | |
| Books A Million | Book Stores | 451211 | 4512 | 3000 | 3000 | 20000 | 205 | \$701,100 | | |
| CD Warehouse | Music Stores | 451220 | 4512 | 1200 | 1200 | 2500 | 252 | \$344,736 | | |
| | | | | | | | | \$1,045,836 | \$4,611,330 | |
| | Book Stores Subtotal | | | | | | | | | |
| Reeds Jewelers | Jewelry Stores | 448310 | 4483 | 500 | 500 | 2100 | 313 | \$178,410 | | |
| Samuels Jewelers | Jewelry Stores | 448310 | 4483 | 577 | 577 | 3690 | 313 | \$205,885 | | |
| Gordons | Jewelry Stores | 448310 | 4483 | 1444 | 1444 | 1666 | 432 | \$711,141 | | |
| | | | | | | | | \$1,095,436 | \$2,706,041 | |
| | | | | | | | | \$1,095,436 | \$2,706,041 | |
| | Jewelry Stores Subtotal | | | | | | | | | |
| | TOTAL SALES OF CORRIDOR-RECOMMENDED STORES WITH WALMART INCLUDED | | | | | | | | \$99,931,555 | \$197,720,234 |

Source: Plunkett's Retail Industry Almanac 2007; Dollars and Cents of Shopping Centers; Wendell Davis & Associates.

**Table 39
Projected Retail Profile: 2018**

| | | TRADE AREA Demographics | | | | 2013 | TRADE AREA Demographics | | | | 2018 |
|---|-----------|-------------------------------|-----------------------|-----------------|---------------|-------------------------------------|---------------------------------|----------------------|--------------------|--|----------|
| | | 2013 Population | | | | 94,392 | 2018 Population | | | | 100,480 |
| | | 2013 Households | | | | 37,269 | 2018 Households | | | | 39,782 |
| | | 2013 Median Disposable Income | | | | \$43,094 | 2018 Median Disposable Income | | | | \$53,050 |
| Industry Summary | NAICS | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap | Nbr of Estabs | Projected Demand (Retail Potential) | Projected Supply (Retail Sales) | Projected Retail Gap | Proj Nbr of Estabs | | |
| Total Retail Trade and Food & Drink | 44-45,722 | \$955,479,212 | \$970,083,980 | (\$14,604,768) | 804 | \$1,255,534,633 | \$1,194,202,328 | \$61,332,304 | 990 | | |
| Total Retail Trade | 44-45 | \$859,069,324 | \$866,705,559 | (\$7,636,235) | 690 | \$1,128,848,513 | \$1,066,940,407 | \$61,908,106 | 849 | | |
| Total Food & Drink | 722 | \$96,409,887 | \$103,378,421 | (\$6,968,533) | 114 | \$126,686,118 | \$127,261,921 | (\$575,803) | 140 | | |
| Industry Group | | | | | | | | | | | |
| Motor Vehicle & Parts Dealers | 441 | \$168,062,887 | \$101,403,473 | \$66,659,414 | 68 | \$220,840,781 | \$124,830,701 | \$96,010,079 | 84 | | |
| Furniture & Home Furnishings Stores | 442 | \$19,979,063 | \$27,192,097 | (\$7,213,035) | 53 | \$26,253,220 | \$33,474,283 | (\$7,221,063) | 65 | | |
| Electronics & Appliance Stores | 4431 | \$25,176,981 | \$18,262,277 | \$6,914,704 | 38 | \$33,083,474 | \$22,481,408 | \$10,602,066 | 47 | | |
| Bldg Materials, Garden Equip. & Supply Stores | 444 | \$26,818,030 | \$54,333,606 | (\$27,515,576) | 49 | \$35,239,872 | \$66,886,290 | (\$31,646,418) | 60 | | |
| Food & Beverage Stores | 445 | \$152,860,598 | \$160,877,502 | (\$8,016,904) | 72 | \$200,864,417 | \$198,045,006 | \$2,819,411 | 89 | | |
| Health & Personal Care Stores | 4,464,461 | \$64,106,215 | \$122,139,027 | (\$58,032,812) | 38 | \$84,237,911 | \$150,356,787 | (\$66,118,876) | 47 | | |
| Gasoline Stations | 4,474,471 | \$100,684,198 | \$283,365,370 | (\$182,681,172) | 14 | \$132,302,719 | \$348,831,227 | (\$216,528,508) | 17 | | |
| Clothing & Clothing Accessories Stores | 448 | \$53,189,543 | \$13,864,954 | \$39,324,589 | 66 | \$69,893,005 | \$44,772,642 | \$25,120,363 | 81 | | |
| Clothing Stores | 4481 | \$38,760,054 | \$7,722,191 | \$31,037,863 | 35 | \$50,932,129 | \$33,944,771 | \$16,987,358 | 43 | | |
| Shoe Stores | 4482 | \$6,536,451 | \$955,766 | \$5,580,685 | 4 | \$8,589,136 | \$3,095,137 | \$5,493,999 | 5 | | |
| Jewelry, Luggage & Leather Goods Stores | 4483 | \$7,893,038 | \$5,186,997 | \$2,706,041 | 27 | \$10,371,741 | \$7,732,735 | \$2,639,006 | 33 | | |
| Sporting Goods, Hobby, Book & Music Stores | 451 | \$22,243,666 | \$22,249,765 | (\$6,099) | 52 | \$29,228,991 | \$28,676,503 | \$552,488 | 64 | | |
| Book, Periodical & Music Stores | 4512 | \$5,501,054 | \$889,724 | \$4,611,330 | 14 | \$7,228,586 | \$2,381,655 | \$4,846,931 | 17 | | |
| General Merchandise Stores | 452 | \$153,784,315 | \$5,261,241 | \$148,523,073 | 9 | \$202,078,215 | \$94,690,549 | \$107,387,666 | 11 | | |
| Other General Merchandise Stores | 4529 | \$97,811,648 | \$2,752,901 | \$95,058,747 | 6 | \$128,528,083 | \$76,931,489 | \$51,596,594 | 7 | | |
| Miscellaneous Store Retailers | 453 | \$23,111,401 | \$31,458,420 | (\$8,347,019) | 185 | \$30,369,226 | \$38,726,254 | (\$8,357,028) | 228 | | |
| Nonstore Retailers | 454 | \$49,052,427 | \$26,297,827 | \$22,754,601 | 48 | \$64,456,683 | \$32,373,410 | \$32,083,273 | 59 | | |
| Food Services & Drinking Places | 722 | \$96,409,887 | \$103,378,421 | (\$6,968,533) | 114 | \$126,686,118 | \$127,261,921 | (\$575,803) | 140 | | |
| Limited-Service Eating Places | 7222 | \$49,395,513 | \$39,931,762 | \$9,463,752 | 36 | \$64,907,511 | \$49,157,191 | \$15,750,320 | 44 | | |

Source: Environmental Systems Research Institute Business Analyst Online (ESRI BAO); Wendell Davis & Associates.

Table 40
Inventory Summary of Land and Building Space

| Parcel Use | Total Parcels/ Spaces | Total Land | Available Land | Total Space | Available Space | Occupancy Rate | Vacancy Rate |
|--------------|--------------------------|---------------|-------------------|----------------|--------------------|-------------------|-----------------|
| Retail | 395 | 207.97 | 8.53 | 1631087 | 210272 | 87.1% | 12.9% |
| Non-Retail | 210 | 248.88 | 16.86 | 1311735 | 114590 | 91.3% | 8.7% |
| Any Use | 50 | 106.85 | 106.85 | 83769 | 83769 | 0.0% | 100.0% |
| Total | 655 | 563.70 | 132.24 | 3026591 | 408631 | 86.50% | 13.50% |

Note: The source for Land and Building Space Tables (Tables 40-51) is: Bexar Appraisal District 2012 parcel files; City of San Antonio Department of Planning and Community Development; Wendell Davis & Associates.

Table 41
Inventory Summary of Land and Building Space for Separate Nacogdoches and Perrin Beitel Segments

| Parcel Use | Nbr | Land Area | Available Space | Building Area | Occ Rate | Vac Rate |
|---|------------|---------------|--------------------|------------------|--------------|--------------|
| <u>Nacogdoches Retail Segment</u> | | | | | | |
| Retail Total | 298 | 163.55 | 186,669 | 1,259,165 | 85.2% | 14.8% |
| Residential Total | 4 | 8.28 | n/a | n/a | n/a | n/a |
| Non-Retail Total | 130 | 93.55 | 96,084 | 771,986 | 87.6% | 12.4% |
| Any Use | 24 | 22.60 | 4,978 | 4,978 | 0.0% | 100.0% |
| Retail Corridor Total | 456 | 287.98 | 287,731 | 2,036,129 | 85.9% | 14.1% |
| <u>Perrin Beitel Mixed Use Segment</u> | | | | | | |
| Retail Total | 97 | 44.42 | 23,603 | 371,922 | 93.7% | 6.3% |
| Residential Total | 6 | 27.83 | n/a | n/a | n/a | n/a |
| Non-Retail Total | 70 | 119.22 | 18,506 | 539,749 | 96.6% | 3.4% |
| Any Use | 26 | 84.25 | 78,791 | 78,791 | 0.0% | 100.0% |
| Mixed Use Corridor Total | 199 | 275.72 | 120,900 | 990,462 | 87.8% | 12.2% |
| <u>NORTHEAST CORRIDOR</u> | | | | | | |
| Retail Total | 395 | 207.97 | 210,272 | 1,631,087 | 87.1% | 12.9% |
| Residential Total | 10 | 36.11 | n/a | n/a | n/a | n/a |
| Non-Retail Total | 200 | 212.77 | 114,590 | 1,311,735 | 91.3% | 8.7% |
| Any Use | 50 | 106.85 | 83,769 | 83,769 | 0.0% | 100.0% |
| Northeast Corridor Total | 655 | 563.70 | 408,631 | 3,026,591 | 86.5% | 13.5% |
| Note: Available space and building area totals do not include residential floor space, land area is included. | | | | | | |

**Table 42
Vacant Land & Improvements for Sale or Lease in the RETAIL Segment**

| Corridor Segment | Type | Owner/ Manager | Address | Land Area (ac) | Avail Lease Space | Building Area (sf) | Comments / Notes |
|---|-------|---|------------------------|----------------|-------------------|--------------------|---|
| Retail | Vac | ZAPATA AMANDA LEE & FELIPE NEIL | 12735 NACOGDOCHES RD | 0.14 | 1,498 | 1,498 | Vacant Building |
| Retail | Vac-N | Marcy Harper | 12006 NACOGDOCHES RD | 1.01 | 3,452 | 3,452 | CRIBLEY SCOTT FAMILY TRUST |
| Retail | Vac-N | San Antonio CPSC Ltd. | 13526 Nacogdoches | 5.50 | 67,546 | 67,546 | Former Penney's billing center, call center, etc. |
| Retail | Vac-N | WELOKA LTD | 11312 PERRIN BEITEL | 0.53 | 7,200 | 7,200 | \$83.19/sf bldg; \$599,000 asking price |
| Retail | Vac-N | BAYEHS PROPERTIES LLC | 11902 PERRIN BEITEL | 0.42 | 4,486 | 4,486 | Vacant Auto Shop |
| Retail | Vac-R | DEROO RONALD R | 4121 NACO PERRIN | 0.22 | 1,479 | 1,479 | Vacant building - former restaurant |
| Retail | Vac-R | JUAREZ JOHN R & EVANGELINE | 12719 NACOGDOCHES RD | 0.28 | 2,222 | 2,222 | Vacant Building |
| Retail | Vac-R | Hansen Family Remainder Trust | 13434 Nacogdoches Rd | 0.73 | 6,600 | 6,600 | NACOGDOCHES ROAD LTD PTSHP |
| Retail | Vac-R | CAST & SONS LLC | 11470 PERRIN BEITEL | 0.40 | 2,085 | 2,085 | Business Closed - For Sale |
| Retail | Vac-R | EF PERRIN BEITEL LTD | 11709 Perrin Beitel Rd | 0.21 | 2,446 | 2,446 | EF PERRIN BEITEL LTD |
| Retail | Vac-R | First State Investors 5200 | 11714 Perrin Beitel | 1.38 | 8,350 | 8,350 | Maggie Nigro, Kennedy-Wilson |
| Retail | Vac-R | WK Properties, Inc. (Perrin Oaks Plaza) | 11823 Perrin Beitel | 4.80 | 61,594 | 61,594 | Ask \$2.4 M; owner outside U.S. MARC Coml |
| TOTAL VACANT LAND W/IMPROVEMENTS IN RETAIL SEGMENT OF THE CORRIDOR | | | | 15.60 | 168958 | 168958 | |

**Table 43
Vacant Land & Improvements for Sale or Lease in the MIXED USE Segment**

| Corridor Segment | Type | Owner/ Manager | Address | Land Area (ac) | Avail Lease Space | Building Area (sf) | Comments / Notes |
|---|-------|-----------------------------|-----------------------------|----------------|-------------------|--------------------|--|
| Mxd | Vac | FIRST COMMUNITY BANK NA | 9528 PERRIN BEITEL | 0.63 | 3,288 | 3,288 | First Commercial Bank |
| Mxd | Vac | Lack Family Partnership | 8611 Perrin Beitel | 4.89 | 63,292 | 63,292 | Vacant 47,000 sf in shopping ctr, former Lacks |
| Mxd | Vac | WENDYS OF SAN ANTONIO | 8814 PERRIN BEITEL | 0.92 | 2,749 | 2,749 | Wendy's (Cedar Enterprises) |
| Mxd | Vac | EL-BAYEH CHAHID | 9510 PERRIN BEITEL | 1.14 | 1,962 | 1,962 | |
| Mxd | Vac | BERLEE LUMBER COMPANY INC & | 4101 SWANS LANDING | 6.67 | | 2,488 | Beitel Estate |
| Mxd | Vac-N | Esther Cortinas | 10803 Perrin Beitel Rd | 1.50 | 1,908 | 1,908 | QWIK ANTHONY (closed?) |
| Mxd | Vac-N | Lionhead Property | 10811 Perrin Beitel | 0.66 | 3,798 | 3,798 | |
| Mxd | Vac-N | | 10811 Perrin Beitel Rd #103 | 0.69 | 4,000 | 4,000 | |
| Mxd | Vac-N | Pam Mc Cluskey | 9990 Perrin Beitel Rd | 3.96 | 1,500 | 1,500 | PBRRP LC |
| TOTAL VACANT LAND WITH IMPROVEMENTS IN THE MIXED USE SEGMENT OF THE CORRIDOR | | | | 21.05 | 82497.00 | 84985.00 | |

**Table 44
Vacant Land for Sale or Lease
(Summary of Tables 45 & 46)**

| Corridor Segment | Type | Land Area (ac) |
|--|-------|----------------|
| Retail (Nacogdoches) | Vac | 21 |
| Retail (Nacogdoches) | Vac-N | 0.93 |
| Total Vacant in Retail Segment | | 22.28 |
| Mxd (Perrin-Beitel) | Vac | 70 |
| Mxd (Perrin-Beitel) | Vac-N | 1.67 |
| Mxd (Perrin-Beitel) | Vac-R | 0.52 |
| Total Vacant in Mixed Use Segment | | 72.19 |

Note: "Type" in this table represents a probable use for vacant property. Vac = Any Use; Vac-N = Non-Retail; Vac-R = Retail

**Table 45
Vacant Land for Sale or Lease – RETAIL Segment**

| Corridor | | Land | | | |
|--|-------|---------------------------------------|------------------------------|--------------|--|
| Segment | Type | Owner/ Manager | Address | Area (ac) | Comments / Notes |
| Retail | Vac | WK PROPERTIES INC | 11823 Perrin Beitel | 0.35 | Parking lot abutting Perrin Oaks Plaza - 0.2 acres |
| Retail | Vac | COMSTOCK INVESTMENTS INC | 5027 LA POSITA ST | 0.30 | Vacant land |
| Retail | Vac | Hallard A Cannon, Owner | 4038 Naco Perrin Blvd | 2.41 | 2.3 ac crnr w/Naco Perrin front/Hallard A Cannon |
| Retail | Vac | CHACHOS APARTMENTS 4 LLC (John Burke) | 4310 Naco-Perrin Rd | 2.25 | less than comps; vac land 2.3 ac |
| Retail | Vac | BALL JEANNIE C TR | Naco Perrin Blvd | 1.06 | Vac land - 1.2 ac w/ Naco-Perrin frntge |
| Retail | Vac | MOSSER EMMANUEL J | 12022 Nacogdoches | 0.96 | Vacant lot abutting Perrin Oaks Shopping Center |
| Retail | Vac | S M P L PROPERTIES INC | 12064 Nacogdoches | 0.61 | Vacant parcel behind Payless Shoe Source |
| Retail | Vac | CNL APF PARTNERS LP | 12078 Nacogdoches | 0.45 | Vac Parcel w/Wendys shared access drive |
| Retail | Vac | CHoudary MOHAMMED A & KHURSHID | 12757 NACOGDOCHES RD | 0.15 | Vacant lot next to auto shop |
| Retail | Vac | STREETER THOMAS H EST TRUST | 13041 NACOGDOCHES RD | 0.50 | Vac land - 0.6 ac behind ofc pk |
| Retail | Vac | TABASSI RICHARD J | 13221 Nacogdoches | 1.11 | Vacant land - 1.1 acres |
| Retail | Vac | GC RESTAURANTS SA LLC | 13331 NACOGDOCHES RD | 0.53 | Vacant corner lot, former gas station, sign |
| Retail | Vac | TRIPAL LLC | 13410 NACOGDOCHES RD | 2.18 | Vac land - 2.2 ac w/CPS lines |
| Retail | Vac | SA3 NAC LLC | 13603 Nacogdoches | 2.11 | Vacant Land? - 2.1 acres (2975sf building?) |
| Retail | Vac | VALENCIA HILLS PARTNERS L P | 13916 OCONNOR RD | 2.68 | |
| Retail | Vac | BANK OF AMERICA NA | 11714 PERRIN BEITEL | 0.80 | |
| Retail | Vac | CRIBLEY SCOTT FAMILY TRUST | 11900 PERRIN BEITEL | 0.52 | Vac lot abutting Perrin Oaks Ctr |
| Retail | Vac | JMKJ DEVELOPMENT LP | 4299 Thousand Oaks | 0.45 | Vacant land behind China Sea & next to VIA |
| Retail | Vac | FRAZIER ROMY | 4601 Thousand Oaks | 1.94 | Vacant land behind HEB - 1.9 acres |
| Retail | Vac-N | PRESIDENTIAL PRODUCTIONS INC | 11203 Perrin Beitel (Wye Dr) | 0.93 | Vac bldg-former gentlemen's club (8822 sf) |
| TOTAL VACANT LAND IN THE RETAIL SEGMENT OF THE CORRIDOR | | | | 22.28 | |

**Table 46
Vacant Land for Sale or Lease – MIXED USE Segment**

| Corridor | | Land | | | |
|---|-------|---------------------------------------|---------------------|--------------|--|
| Segment | Type | Owner/ Manager | Address | Area (ac) | Comments / Notes |
| Mxd | Vac | Anuar Name | 4203 Center Gate | 0.75 | Corner lots |
| Mxd | Vac | ANUAR NAME | 4218 GATE CREST | 1.11 | Rich Stagers Broker |
| Mxd | Vac | UNIVERSAL DEVELOPMENT PROPS | 2611 E LOOP 410 | 5.03 | Vacant land, part of 7.2 acres w/ common owner |
| Mxd | Vac | UNITED STATES POSTAL SERVICE | 10412 PERRIN BEITEL | 5.24 | Vac land - 5.2 ac owned by USPS |
| Mxd | Vac | UNITED STATES POSTAL SERVICE | 10412 PERRIN BEITEL | 4.80 | Vac land - 4.8 ac owned by USPS |
| Mxd | Vac | ANUAR NAME | 4203 CENTER GATE DR | 0.98 | Vac land, pt of 3 ac w/same owner |
| Mxd | Vac | UNIVERSAL DEVELOPMENT PROPS | 8623 Perrin Beitel | 1.18 | Vac land, pt of 7.2 ac w/common owner |
| Mxd | Vac | UNIVERSAL DEVELOPMENT PROPS | 8625 PERRIN BEITEL | 0.94 | Vacant land, part of 7.2 acres w/common owner |
| Mxd | Vac | Richard Breakie Properties | 8727 Perrin Beitel | 1.09 | Vacant land - 1.1 acres landlocked, behind KFC |
| Mxd | Vac | LEASEBACK INC | 8802 PERRIN BEITEL | 1.40 | Vac land, pt of 2.6 ac w/same owner |
| Mxd | Vac | Leaseback Inc Ben Allen, Daniel Allen | 8802 PERRIN BEITEL | 1.16 | Vac land, pt of 2.6 ac w/same owner |
| Mxd | Vac | | 8916 Perrin Beitel | 1.00 | Vacant land, part of 3 acres w/common owner |
| Mxd | Vac | BOASI PAUL S & MARIE C | 9018 PERRIN BEITEL | 0.37 | Vac lot next to Brake Check |
| Mxd | Vac | MARIBAL PROPERTIES INC | 9800 Perrin Beitel | 3.57 | 3.5 acres Brian Harris, NAI REOC |
| Mxd | Vac | PBRRP LC | PERRIN BEITEL | 2.18 | Vac land - 2 ac landlocked S of Post Office |
| Mxd | Vac | NORTH EAST I S D | POST OFFICE DR | 20.43 | Vacant land - 20.2 acres owned by NEISD |
| Mxd | Vac | ALAMO DOG OBEDIENCE CLUB | 4223 Sunshadow St | 0.31 | Vacant parcel between vet clinic and SF |
| Mxd | Vac | FRIDAY PIPELINE CO. | Wurzbach Pkwy | 18.46 | Vac land - 17.8 ac w/Wurzbach Pkwy frntge |
| Mxd | Vac-N | Aubrey Chancellor - NEISD | Wurzbach Pkwy | 1.67 | 1.6 ac owned by NEISD |
| Mxd | Vac-R | Mac Riddick | 10303 Perrin Beitel | 0.52 | MANANA Acquisition Corp |
| TOTAL VACANT LAND IN THE MIXED USE SEGMENT OF THE CORRIDOR | | | | 72.19 | |

**Table 47
Vacant Land and Improvements in the RETAIL Segment**

| Corridor | | | | | Land Area | Avail Lease | |
|---|-------|----------------------------------|---|------------------------|--------------|----------------|---|
| Segment | Type | Business Name 2012 | Owner/ Manager | Address | (ac) | Space | Comments / Notes |
| Retail | Vac-R | | DEROO RONALD R | 4121 NACO PERRIN | 0.22 | 1,479 | Vacant building - former restaurant |
| Retail | Vac-N | Vacant Perrin Oaks SC (pt) | Marcy Harper | 12006 NACOGDOCHES RD | 1.01 | 3,452 | CRIBLEY SCOTT FAMILY TRUST |
| Retail | Vac-R | | JUAREZ JOHN R & EVANGELINE | 12719 NACOGDOCHES RD | 0.28 | 2,222 | Vacant Building |
| Retail | Vac | Vacant Retail/2nd Flr | ZAPATA AMANDA LEE & FELIPE NEIL | 12735 NACOGDOCHES RD | 0.14 | 1,498 | Vacant Building |
| Retail | Vac-R | Blockbuster (being remodeled) | Hansen Family Remainder Trust | 13434 Nacogdoches Rd | 0.73 | 6,600 | NACOGDOCHES ROAD LTD PTSHP |
| Retail | Vac-N | Alliance Data Processing Service | San Antonio CPSC Ltd. | 13526 Nacogdoches | 5.50 | 67,546 | |
| Retail | Vac-N | Medical Office | WELOKA LTD | 11312 PERRIN BEITEL | 0.53 | 7,200 | \$83.19/sf bldg; \$599,000 asking price |
| Retail | Vac-R | Chicken Kings | CAST & SONS LLC | 11470 PERRIN BEITEL | 0.40 | 2,085 | Business Closed - For Sale |
| Retail | Vac-R | Pronio Insurance | EF PERRIN BEITEL LTD | 11709 Perrin Beitel Rd | 0.21 | 2,446 | EF PERRIN BEITEL LTD |
| Retail | Vac-R | Closed Bank w/drive thru | First State Investors 5200 | 11714 Perrin Beitel | 1.38 | 8,350 | Maggie Nigro, Kennedy-Wilson |
| Retail | Vac-R | Perrin Oaks Shopping Center | WK Properties, Inc. (Perrin Oaks Plaza) | 11823 Perrin Beitel | 4.80 | 61,594 | Ask \$2.4 M; owner outside U.S. MARC Coml |
| Retail | Vac-N | Auto Shop | BAYEHS PROPERTIES LLC | 11902 PERRIN BEITEL | 0.42 | 4,486 | Vacant Auto Shop |
| TOTAL VACANT LAND W/IMPROVEMENTS IN RETAIL SEGMENT OF THE CORRIDOR | | | | | 15.60 | 168,958 | |

**Table 48
Vacant Land and Improvements in the MIXED USE Segment**

| Corridor | | | | | Land Area | Avail Lease | |
|--|-------|----------------------------|-----------------------------|------------------------------|--------------|----------------|--|
| Segment | Type | Business Name 2012 | Owner/ Manager | Address | (ac) | Space | Comments / Notes |
| Mxd | Vac-N | Auto Zoo | Eslier Cortinas | 10803 Perrin Beitel Rd | 1.50 | 1,908 | |
| Mxd | Vac-N | Office, 2 Story | Lionhead Property | 10811 Perrin Beitel | 0.66 | 3,798 | |
| Mxd | Vac-N | Meckelen De Castilla | | 10811 Perrin Beitel Rd # 103 | 0.69 | 4,000 | |
| Mxd | Vac | Lack's Furniture | Lack Family Partnership | 8611 Perrin Beitel | 4.89 | 47,000 | Vac space in shopping ctr., former Lacks |
| Mxd | Vac | Closed Fast Food (Wendy's) | WENDYS OF SAN ANTONIO | 8814 PERRIN BEITEL | 0.92 | 2749 | Wendy's (Cedar Enterprises) |
| Mxd | Vac | VACANT former U-Haul | EL-BAYEH CHAHID | 9510 PERRIN BEITEL TX | 1.14 | 1962 | |
| Mxd | Vac | Texas Shine Car Wash | FIRST COMMUNITY BANK NA | 9528 PERRIN BEITEL | 0.63 | 3288 | First Commercial Bank |
| Mxd | Vac-N | Budget Car/Truck Rental | Pam Mc Cluskey | 9990 Perrin Beitel Rd | 3.96 | 1500 | PBRRP LC |
| Mxd | Vac | Apartments? | BERLEE LUMBER COMPANY INC & | 4101 SWANS LANDING | 6.67 | 2,488 | |
| TOTAL VACANT LAND W/IMPROVEMENTS IN MIXED USE SEGMENT OF THE CORRIDOR | | | | | 21.05 | 68,693 | |
| Total Vacant Land With Improvements in the Corridor | | | | | 36.66 | 237,651 | |

Table 49
Vacant Building Space for Lease – RETAIL Segment

| Corridor Segment | Type | Owner/ Manager | Address | Avail Lease Space | Comments / Notes |
|---|-------|--------------------------------|-------------------------------|-------------------|---|
| Retail | Vac | 3B & 3B CORP | 4731 Erin Blvd | 1,200 | Vacant building on lot with auto uses |
| Retail | Vac | NACO-PERRIN LAND TRUST | 4035 Naco Perrin Blvd # 106 | 1,200 | |
| Retail | Vac | Delta Properties | 4111 Naco Perrin | 1,080 | |
| Retail | Vac-N | BALLER DAVID J & STEFANIE J | 5030 LA POSITA ST | 2,750 | |
| Retail | Vac-N | BALLER DAVID J & STEFANIE J | 5030 La Posita St | 2,750 | |
| Retail | Vac-N | ALOHA SELF STORAGE LLC | 12414 Nacogdoches Rd | 1,400 | |
| Retail | Vac-N | 11203 PERRIN BEITEL LAND TRUST | 11207 PERRIN BEITEL | 500 | \$55.56/sf bldg; \$400,000 asking price |
| Retail | Vac-R | | 4103 Avenida Prima | 1,200 | Vacant Suite |
| Retail | Vac-R | NACO PERRIN LLC | 4025 Naco Perrin Blvd # B | 1,500 | |
| Retail | Vac-R | | 4110 Naco Perrin Blvd | 3,600 | Vacant building - former restaurant |
| Retail | Vac-R | | 4129 Naco Perrin Blvd | 2,500 | Vacant suite in Perrin Plaza Annex Sc |
| Retail | Vac-R | PERRIN PLAZA ANNEX LLC | 4137 Naco Perrin Blvd # 1 | 2,500 | |
| Retail | Vac-R | Marilyn Mc Kenzie | 4137 Naco Perrin Blvd # 2 | 2,500 | Closed? |
| Retail | Vac-R | Delta Properties | 4165 Naco Perrin | 1,500 | |
| Retail | Vac-R | | 12242 Nacogdoches | 1,500 | Vac ste in Midnight Rodeo center |
| Retail | Vac-R | Sammye Forrester | 12743 Nacogdoches | 1,500 | |
| Retail | Vac-R | Arizipe Properties | 13032 Nacogdoches | 945 | range is \$1 to \$1.10/sf/mo |
| Retail | Vac-R | ECA LIMITED PARTNERSHIP | 13250 Nacogdoches | 7,688 | |
| Retail | Vac-R | | 13323 Nacogdoches | 4,000 | |
| Retail | Vac-R | EDDIE ENG COMPANY INC | 13327 NACOGDOCHES RD | 1,200 | |
| Retail | Vac-R | MWM Fund II Ltd | 13909 Nacogdoches Rd | 2,034 | |
| Retail | Vac-R | | 13909 Nacogdoches Rd | 1,650 | |
| Retail | Vac-R | | 13909 Nacogdoches Rd #105-197 | 10,300 | |
| Retail | Vac-R | | 13909 Nacogdoches Rd #105-197 | 10,500 | |
| Retail | Vac-R | Maria Solis-gueva | 13909 Nacogdoches Rd # 106 | 4,185 | |
| Retail | Vac-R | Dade Phelan | 13918-13956 Nacogdoches | 12,019 | Vacant suite in Planet Fitness SC |
| Retail | Vac-R | Wengjing | 13924 Nacogdoches | 1,717 | |
| Retail | Vac-R | OPB OFFICE PARK LLC | 11549 OLD PERRIN BEITEL RD | 900 | |
| Retail | Vac-R | | 11401 Perrin Beitel | 3,250 | Vacant suite in Perrin Plaza SC |
| Retail | Vac-R | ABDO GEORGE J ETAL | 11401 PERRIN Beitel | 5,600 | |
| Retail | Vac-R | | 11528 Perrin Beitel | 1,500 | 4M Realty |
| Retail | Vac-R | Sandi Leone | 11538 PERRIN BEITEL | 1,500 | Vespero Plaza LP-lease 800-383-5342 |
| Retail | Vac-R | | 11705 Perrin Beitel | 1,200 | Vac ste at sm shopping center |
| Retail | Vac-R | | 11705 Perrin Beitel | 1,200 | Vacant suite in small shopping center |
| Retail | Vac-R | | 11933 Perrin Beitel Rd | 1,200 | |
| Retail | Vac-R | | 11933 Perrin Beitel Rd # 604 | 1,500 | |
| Retail | Vac-R | | 4307 Thousand Oaks Dr | 1,500 | |
| Retail | Vac-R | | 4447 Thousand Oaks Ste 102 | 3,729 | Vacant suite next to Kims Academy |
| TOTAL VACANT FLOOR SPACE IN THE RETAIL SEGMENT OF THE CORRIDOR | | | | 108,497 | |

**Table 50
Vacant Building Space for Lease – MIXED USE Segment**

| Corridor Segment | Type | Owner/ Manager | Address | Avail Lease Space | Comments / Notes |
|---|-------|-------------------------------------|-----------------------------|-------------------|---|
| Mxd | Vac-R | Arturo Martinez | 10415 Perrin Beitel Rd | 2,500 | |
| Mxd | Vac-R | ARIZPE JOHN E & JUDY M | 10704 PERRIN BEITEL | 1,200 | \$1.10/sf/mo + for retail |
| Mxd | Vac-R | George Slumberg | 10718 Perrin Beitel | 1,500 | |
| Mxd | Vac-R | | 10722 Perrin Beitel | 1,500 | |
| Mxd | Vac-R | Gary Wood | 9320 Perrin Beitel Rd | 300 | |
| Mxd | Vac-R | JOE-MIKE PARTNERSHIP II | 9323 Perrin Beitel | 4,000 | |
| Mxd | Vac-R | | 9323 Perrin Beitel Rd | 4,000 | |
| Mxd | Vac-R | | 9400 Perrin Beitel Rd # 104 | 1,428 | nnn; (\$2,029/mo) 3-5 yr lease; |
| Mxd | Vac-R | Heather Salter | 9504 Perrin Beitel Rd | 1,200 | |
| Mxd | Vac-R | BRADFORD ALFRED G IRREVOCABLE TRUST | 4158 SWANS LANDING | 2,000 | |
| Mxd | Vac-R | | 10604 Perrin Beitel Rd | 1,200 | MINA PROPERTIES LTD 771-3526 |
| Mxd | Vac | | 2897 NE Loop 410 # 2 | 2,500 | |
| Mxd | Vac | | 2897 NE Loop 410 | 2,500 | Former Gemini Ambulances |
| Mxd | Vac | TEXAS HOME IMPROVEMENT INC | 10415 Perrin Beitel | 2,500 | |
| Mxd | Vac-N | Bill Wheeler | 4163 Acorn Hill | 1,200 | LIONHEAD PROPERTY LLC |
| Mxd | Vac-N | LIBERTY PROPERTIES | 10427 Perrin Beitel | 2,500 | Vac suites in office/ warehouse flex |
| Mxd | Vac-N | PARTNERS INVESTORS PO LTD | 10615 Perrin Beitel | 1,200 | PERRIN OAKS GARDEN OFFICES |
| Mxd | Vac-N | | 10807 Perrin Beitel | 1,200 | Vacant suites in Acorn Hill Plaza office park |
| Mxd | Vac-N | PINNACLE INTERESTS | 10807 Perrin Beitel Rd | 1,200 | |
| Mxd | Vac-R | Arturo Martinez | 10415 Perrin Beitel Rd | 2,500 | |
| Mxd | Vac-R | ARIZPE JOHN E & JUDY M | 10704 PERRIN BEITEL | 1,200 | \$1.10/sf/mo + for retail |
| Mxd | Vac-R | George Slumberg | 10718 Perrin Beitel | 1,500 | |
| Mxd | Vac-R | | 10722 Perrin Beitel | 1,500 | |
| Mxd | Vac-R | Gary Wood | 9320 Perrin Beitel Rd | 300 | |
| Mxd | Vac-R | JOE-MIKE PARTNERSHIP II | 9323 Perrin Beitel | 4,000 | |
| Mxd | Vac-R | | 9323 Perrin Beitel Rd | 4,000 | |
| Mxd | Vac-R | | 9400 Perrin Beitel Rd # 104 | 1,428 | nnn; (\$2,029/mo) 3-5 yr lease; |
| Mxd | Vac-R | Heather Salter | 9504 Perrin Beitel Rd | 1,200 | |
| Mxd | Vac-R | BRADFORD ALFRED G IRREVOCABLE TRUST | 4158 SWANS LANDING | 2,000 | |
| Mxd | Vac-R | | 10604 Perrin Beitel Rd | 1,200 | MINA PROPERTIES LTD 771-3526 |
| TOTAL VACANT BUILDING SPACE WITH IMPROVEMENTS IN THE MIXED USE SEGMENT OF THE CORRIDOR | | | | 17,128 | |

**Table 51
Vacant Space for Lease Multi-purpose/Non-Retail**

| Type | Business Name 2012 | Owner/ Manager | Address | BCAD | Land Area (ac) | Avail Lease Space | Building Area (sf) | Asking price | Comments / Notes |
|--------------------|----------------------------------|---------------------------------|-----------------------------|---------|----------------|-------------------|--------------------|--------------|--|
| Vac | | 3B & 3B CORP | 4731 Erin Blvd | 587409 | | 1,200 | 1,200 | dnd | Vacant building on lot with auto uses |
| Vac | J B Smith Homes | NACO-PERRIN LAND TRUST | 4035 Naco Perrin Blvd # 106 | | | 1,200 | 1,200 | | |
| Vac | | Delta Properties | 4111 Naco Perrin | | | 1,080 | 1,080 | | |
| Vac | Vacant Retail/2nd Flr | ZAPATA AMANDA LEE & FELIPE NEIL | 12735 NACOGDOCHES RD | 587523 | 0.14 | 1,498 | 1,498 | | Vacant Building |
| Vac | Gemini Ambulance Svc | | 2897 NE Loop 410 | | | 2,500 | | n/a | Former Gemini Ambulances; moved to 281/Bitlers |
| Vac | Office/ Loft | TEXAS HOME IMPROVEMENT INC | 10415 Perrin Beitel | 993847 | | 2,500 | | | |
| Vac | Texas Shine Car Wash | FIRST COMMUNITY BANK NA | 9528 PERRIN BEITEL | 533043 | 0.63 | 3,288 | 3,288 | | First Commercial Bank |
| Vac | Lack's Furniture | Lack Family Partnership | 8611 Perrin Beitel | 500205 | 4.89 | 63,292 | 63,292 | | Vacant 47,000 sf in shopping ctr, former Lacks |
| Vac | Closed Fast Food (Wendy's) | WENDYS OF SAN ANTONIO | 8814 PERRIN BEITEL | 624390 | 0.92 | 2,749 | 2,749 | | Wendy's (Cedar Enterprises) |
| Vac | VACANT former U-Haul | EL-BAYEH CHAHID | 9510 PERRIN BEITEL TX | 1084971 | 1.14 | 1,962 | 1,962 | | |
| Vac Total | | | | | 7.72 | 81269 | 76269 | | |
| Vac-N | Kdm Satellite | BALLER DAVID J & STEFANIE J | 5030 La Posita St | | | 2,750 | 2,750 | | |
| Vac-N | Gruesbeck Medical Clinic | ALOHA SELF STORAGE LLC | 12414 Nacogdoches Rd | | | 1,400 | 1,400 | | |
| Vac-N | Atrium of Perrin Beitel | 11203 PERRIN BEITEL LAND TRUST | 11207 PERRIN BEITEL | | | 500 | 500 | | \$55.56/sf bldg; \$400,000 asking price |
| Vac-N | Vacant Perrin Oaks SC (pt) | Marcy Harper | 12006 NACOGDOCHES RD | 587055 | 1.01 | 3,452 | 3,452 | | CRIBLEY SCOTT FAMILY TRUST |
| Vac-N | Alliance Data Processing Service | San Antonio CPSC Ltd. | 13526 Nacogdoches | 625493 | 5.50 | 67,546 | 67,546 | | |
| Vac-N | Medical Office | WELOKA LTD | 11312 PERRIN BEITEL | 617726 | 0.53 | 7,200 | 7,200 | \$83.19 | \$83.19/sf bldg; \$599,000 asking price |
| Vac-N | Auto Shop | BAYEHS PROPERTIES LLC | 11902 PERRIN BEITEL | 549487 | 0.42 | 4,486 | 4,486 | | Vacant Auto Shop |
| Vac-N | | Bill Wheeler | 4163 Acorn Hill | 587028 | | 1,200 | | | LIONHEAD PROPERTY LLC |
| Vac-N | Office Suites/Office Whse | LIBERTY PROPERTIES | 10427 Perrin Beitel | | | 2,500 | | | Vac suites in office/ warehouse flex |
| Vac-N | Offices, Garden | PARTNERS INVESTORS PO LTD | 10615 Perrin Beitel | 630714 | | 1,200 | | | PERRIN OAKS GARDEN OFFICES |
| Vac-N | Office, 1 Story/Retail | | 10807 Perrin Beitel | 630724 | | 1,200 | | | Vacant suites in Acorn Hill Plaza office park |
| Vac-N | Auto Zoo | Esther Cortinas | 10803 Perrin Beitel Rd | 587033 | 1.50 | 1,908 | 1,908 | | OWIK ANTHONY (closed?) |
| Vac-N | Office, 2 Story | Lionhead Property | 10811 Perrin Beitel | 587028 | 0.66 | 3,798 | 3,798 | | |
| Vac-N | Budget Car/Truck Rental | Pam Mc Cluskey | 9990 Perrin Beitel Rd | 542082 | 3.96 | 1,500 | 1,500 | | PBRRP LC |
| Vac-N Total | | | | | 13.57 | 100640 | 94540 | | |

NORTH EAST CORRIDOR REVITALIZATION INITIATIVE SURVEY METHODOLOGY AND RESULTS

As part of the NEC Market Study, Consultant was tasked with conducting a minimum of 100 surveys to stakeholders within the Corridor and Trade Area. Consultant and the Department of Planning and Community Development prepared a possible mailing list from the Bexar Appraisal District ownership records and a file from InfoUSA that provided a list of all businesses within the corridor as of 2012, a list of Steering Committee members and a list of contacts with Neighborhood Associations. This list originally included more than 700 names. A mailing list of 190 names was taken from the list of possible interviewees based on major employers, steering committee members, neighborhood association contacts and business selected from types of businesses. All vacant properties were represented on the list. The DPCD sent letters to the potential interviewees in August and the consulting team began to contact those on the list.

Of the original 190, there were 19 Major Employers, 6 Steering Committee members, 30 Neighborhood Associations for whom telephone numbers were available, 40 businesses and 60 persons representing vacant properties for sale or lease.

Initially, multiple attempts were made to contact every person on the mailing list. First priority was to call for a telephone interview. In the case of Major Employers and the Steering Committee it was to make appointments for personal interviews. Very few major employers were interviewed, though multiple contacts were attempted. Typically, local contacts of major corporations would not agree to an interview.

All Neighborhood Association representatives were called and telephone interviews were conducted with 24 of 34 that could be reached. Most of those not contacted was because of no current telephone number.

Many business owners, managers and employees were contacted by telephone, many were interviewed in person at the place of business and where there were those that were “too busy” to talk, copies of the questionnaire were left at the place of business. Completed questionnaires were picked up on subsequent visits. Of the 91 businesses attempted to contact, 54 were successfully interviewed or completed the questionnaire on their own. Typically, when questionnaires were dropped off at a place of business, a copy of the letter from the DPCD with a map on the reverse side were left with the questionnaire.

Representing Vacant Properties were real estate brokers and property owners. Of the 200 vacant properties identified and contacted, there were 31 successfully completed questionnaires. However, there were more than 31 vacant properties represented in the questionnaire due to representatives owning or listing multiple land or leasable space.

In summary, there were a total of 111 surveys completed as follow:

| | |
|---------------------------|-------------------|
| Businesses | 54 of 91 |
| Major Employers | 2 of 19 |
| Steering Committee | 6 of 6 |
| Neighborhood Associations | 18 of 28 |
| Vacant Properties | 31 of 81 |
| TOTAL | 111 of 226 |

Survey results were compiled by the above categories with raw answers included for each question, even duplicate answers. Not all questions were answered by all respondents. A second level of compilation was to list all answers by eliminating the duplicates. This level of results is included below by major category: Businesses, Steering Committee/Neighborhood Associations and Vacant Properties. The original questionnaires were too long, so the three different questionnaires became only one page each.



City of San Antonio
Planning & Community Development



August 8, 2013

SUBJECT: NEC Revitalization Initiative [Perrin Beitel + Nacogdoches] Interview Request

Dear Citizen:

Over the coming years, the Northeast Corridor Revitalization Initiative will work to restore vitality to the Perrin Beitel and Nacogdoches corridors. This Initiative will capitalize on opportunities to activate vacant and underutilized properties, re-establish community-serving retail and service businesses, and improve the appearance of buildings, signs, and parking lots. Revitalizing the Northeast Corridor will require community support, tactical partnerships, strategic planning, and targeted investments.

As part of this initiative, the City of San Antonio has contracted with **Wendell Davis & Associates** to conduct a market study of the corridor and trade area. This study includes interviews of business owners, vacant property owners and brokers representing them, major employers and representatives of neighborhood associations. Over the next few weeks, Wendell Davis or a member of his staff will be contacting you with a request for an interview to learn more about what is going on in the corridor, your opinions, and knowledge of future plans.

Please consider making yourself or someone familiar with the business, property or corridor environment available for an interview to be conducted by Wendell Davis & Associates. We sincerely appreciate your interest and hope that you will be a contributing partner in this effort. If you need additional information or have questions, please contact me at (210) 207-0145 or michael.taylor@sanantonio.gov.

Sincerely,

Michael Taylor, AICP
Corridor Revitalization Manager
Department of Planning & Community Development

The Northeast Corridor Revitalization Initiative was launched by District 10 Councilman Carlton Soules with staff support provided by the City of San Antonio Department of Planning and Community Development.

QUESTIONNAIRE for BUSINESS OWNERS and MANAGERS
CITY OF SAN ANTONIO NORTH EAST CORRIDOR REVITALIZATION STUDY

Name _____ Business Name _____

Property location _____ Date _____ Phone _____

Email _____

1. What is good about this location in the Corridor ?
2. What is NOT good about this location?
3. What types of retail/service businesses are there **not enough** of in the Corridor?
4. What improvements are needed in Corridor infrastructure? (especially near your business)
(Streets, Curb cuts, Parking, Drainage, Sidewalks, Bicycle lanes, Electricity/lighting, Gas, Sewer and Water)
5. What other types of improvements are needed in the Corridor? (Transportation Access, Maintenance of buildings/ grounds, appearance of stores, signs, Green spaces, Landscaping, Outside storage areas/yards, Mix of uses & crime)
6. What obstacles do you think there are to opening a business, developing or redeveloping in the Corridor?
7. What conditions hamper desirable retail & service businesses and industries from locating in the Corridor?
8. What should the City do to help revitalize the corridor?
9. What kind of foot traffic is experienced at the establishments with which you are familiar?
10. Where are the 1 or 2 MOST attractive locations in the Corridor?
11. Where are the 1 or 2 LEAST attractive locations in the Corridor?
12. What are your plans for your property or your business?
13. Do you know of any proposed **PRIVATE** projects within the Corridor? (new or remodeling)
14. Do you know of any proposed **PUBLIC** projects within the Corridor? (buildings and/or infrastructure)
15. What are the characteristics of the Corridor workforce or available labor pool? (hiring, qualifications, availability, willingness, attitude)

QUESTIONNAIRE for MAJOR EMPLOYERS
CITY OF SAN ANTONIO NORTH EAST CORRIDOR REVITALIZATION STUDY

Name _____ Business Name _____

Property location _____ Date _____ Phone _____

How many employees _____ Email _____

1. In your opinion, what is good about this location within the Corridor or within San Antonio?
2. What is NOT good about this location?
3. What improvements are needed in Corridor infrastructure, especially near your business?
(Streets, Curb cuts, Parking, Drainage, Sidewalks, Bicycle lanes, Electricity/ lighting, Gas, Sewer and Water)
4. What other types of improvements are needed in the Corridor?
(Transportation, Maintenance of buildings/grounds, Appearance of stores, signs, Green spaces, Landscaping, Outside storage areas/yards, Mix of uses and crime)
5. What obstacles do you think there are to opening a business, developing or redeveloping in the Corridor?
6. What conditions hamper desirable retail & service businesses and industries from locating in the Corridor?
7. What should the City do to help revitalize the corridor?
8. What kind of foot traffic is experienced at the establishments with which you are familiar?
9. Where are the 1 or 2 MOST attractive locations in the Corridor?
10. Where are the 1 or 2 LEAST attractive locations in the Corridor?
11. What are your plans for your business?
12. Do you know of any proposed **PRIVATE** projects within the Corridor? (new or remodeling)
13. Do you know of any proposed **PUBLIC** projects within the Corridor? (buildings and/or infrastructure)

RESULTS OF SURVEY OF EXISTING BUSINESSES**1. WHAT IS GOOD ABOUT THIS LOCATION?**

It is a destination for businesses with good prices.

good police/fire coverage and good visibility.

a lot of drive-by traffic and also good visibility.

in expensive and convenient.

good traffic flow and not a lot of tagging.

good access to freeways, close to Wurzbach Parkway so the traffic is good, people driving by will see the sign for the business.

area is affordable and there is a lot of traffic on Perrin Beitel.

Section 8 housing development across street provides a supply of customers.

good bus service and access to the freeway.

good traffic due to proximity to 410.

Next to restaurants

Area is near the airport

busy intersection

convenient, live and work in the same area.

easy to give directions to locate,

has restaurants.

amount of traffic in area can provide business opportunities

2. WHAT IS NOT GOOD?

crime has increased last 2-2.5 years.

Lots of transients & vagrants occupying a racquetball/fitness center through hole in chain-link fence.

a lot of homeless, arson, squatting, buildings being broken into and the area has been on a decline for 30 years. Also there is empty retail space, specifically a former Bank of America and an empty Racquetball and Fitness Space.

too much traffic after Wal-Mart opens.

More roadwork needed, removal of median that prevents people from legally entering the business.

Too much traffic

cemetery that is not well maintained

not enough SAPD drive-through.

drug issues in nearby apartment complexes,

strip joint located next to a daycare

Needs more bus stop lights.

There is crime and also pawn shops giving the impression of high crime and drug activity.

area is slowly dying and other businesses have left.

Business not steady due to low income of the area.

Area looks run down, lower class,

strip center that is surrounded by barbed wire.

defunct brothel next door that caught fire and was not torn down

Lots of vagrants setting up "tent cities".

Too much vandalism in this location

Vacant building is housing the homeless.

Parking lots need to be resurfaced, and there are door to door solicitors.

lots of homeless people in vacant buildings.

neighborhood experiencing economic blight.

Two (2) strip clubs in the area open until 6 am w/parties in parking lots of school and other businesses until early morning.

The trucks from the cement factory mess up the road.

Other businesses have closed, specifically the racquetball and fitness center, making the area look bad and taking down values.

migration after Katrina possibly lead to increase in robberies that led to business being closed down.

lot of wrecks at the curve where Naco-Perrin meets Perrin Beitel due to the bad lighting.

lot of crime, homeless and bars. landlord does not help and ends up as safety issues for customers.

business is not on Main Street and the HOA made them take down their sign.

There are there multi-story red brick buildings that may have title problems, they are empty on and off for 25 years and one was turned into a strip joint. It sits there empty, burned, and ruined by vagrants. owner does not care!

There is a hobo camp and tent city behind.

The number of drive entrances causes a lot of traffic issues.

many buildings vacant

building across the street from HEB on Perrin B. had been empty for many years and is an eyesore.

Too many entrances (curb cuts), too many vacant buildings

Too far into parking lot.

3. NOT ENOUGH

Mexican restaurants

Boutique type restaurants

Professional offices.

Bigger chain restaurants.

Hardware store and fancier stores.

Shopping opportunities for clothes, household items appliances and shoes.

Gas stations

Clothes, shoes shopping. Wal-Mart

Upscale restaurants.

There is not enough retail shopping. Wal-Mart coming into this area is good news for all that live in the area south of Thousand Oaks to Loop 410 as there is no shopping alternatives in the area.

Clothing stores would be a great improvement as alternative to Wal-Mart

restaurants such as jim's, Chick fil a, etc would be improvement over pizza and Mexican food restaurants.

Not enough retail; need clothing stores, Jim's, Chik-fil-A

Upscale restaurants, crafts, clothing

Need matching design standards.

4. IMPROVEMENTS NEEDED

Better curb cut, wayfinding, median is full of overgrown weeds and asphalt.

More bike lanes, lots of customers on bikes.

Median is messy, didn't finish off. No closed up buildings. Bank with drive-ins

Lights @ corner by curve.

Better street maintenance, landscaping, building maintenance.

Widen Nacogdoches and Perrin-Beitel. Improve traffic flow especially after the Wal-Mart being built.

Do something about transients and graffiti.

More lights at bus stops, and also Perrin-Naco and El Sendero

More street lights

Bury powerlines,

The large tire shop (I believe it is the Martinez Tire Shop) has been added to several times causing it to have an unappealing look. Because of the addition, the building a little area on the front side of the business and when customers pull out of the parking lot it usually causes and problem.

This is not a well kept area of the street. The business on Naco Perrin has been a problem for many many years and that is the business that use to be a gentleman's club. These buildings in the area of Naco Perrin have improved somewhat but additional improvement is needed; to include the area around the buildings.

Buildings on Naco Perrin, tire shop.

Aesthetic attractions.

Sidewalks, lighting and more safety (i.e. SAPD)

5. OTHER IMPROVEMENTS NEEDED

Maintenance of median

Target/Wal-Mart

The turn @ Naco-Perrin. No bus lines within 3 blocks.

Homeless problem,

landscaping

Empty building need to be dealt with.

Post office looks crappy-no maintenance. Visually the area looks ugly, better signs make post office look nicer.

More lighting.

Landscaping requirement for any new buildings.

Transportation in the area is great, maintenance of the buildings to include landscaping needs to be improved.

Many the vacant buildings need to be kept up (maybe this would help renting of the business). Several businesses do not keep up exteriors of the buildings, although there have been many businesses around the new Wal-Mart that have painted their exteriors which has improved the look.

Building maintenance, landscaping & maintenance, exterior appearance,

More police presence; employees afraid of working late because of suspicious people hanging about.

Appearance in stores, dealing with crime.

6. OBSTACLES

Lack of land and property. Finding investors.

Glut of Mexican restaurants and hair. Need big sign, could be a standard dictated for how big the sign is.

Low income-crime, homelessness, alcoholism, and bad police response. Low income population.

Clientele: residential population is kind of "riff-raff"

It is remote and not centrally located.

The fire code-expensive to operate within restrictive regulations.

Visual appearance-empty spaces and businesses closed down.

Does not feel safe-office has been broken into several times, alarm goes off repeatedly.

Finding the right customer base.

Dead strip centers-abandoned eyesores.

Neighborhoods/residential areas surrounding could not support much. The area is poor and declining.

Area, in total, looks rundown; landscaping, and vagrants.

Signage and advertisement.

7. CONDITIONS THAT HAMPER

Crime, arson, lawyers office was burned down, robbery at bank, apartment arson.

Empty buildings

Timing lights to increase traffic flow.

Depends on business market.

Heavy traffic on small street, businesses are all just “stuck” everywhere and look ugly. The older building, not nice looking.

The apartment complex.

Lower income neighborhood, close to probation office; crime has increased.

Low rent area, drab, transient population, empty buildings.

Poor property conditions-lack of maintenance on corridor.

I do not have an answer for this question.

Buildings needing updates or renovation.

8. WHAT SHOULD THE CITY DO?

Bring in key businesses, other than fast food restaurants, draw different people.

Door to door soliciting?

Bring more attention to it through marketing the region. recruit new businesses.

Get people (residents/owners) more involved in neighborhood.

Real estate owners to put tenants in their buildings.

Better roads, up to businesses to spruce up, clean up storefronts.

“Clean it up”, vacant buildings-empty lots and electrical wires.

Cut down on crime.

Sports facilities? Park District, YMCA and more police presence.

Offer incentives to move reputable businesses into the area; businesses such as restaurants, craft, and clothing stores.

Discourage certain types of business, such as: auto part stores

Bring in more police presence; condemn/teardown unsightly buildings.

Mandate ordinance/ create cleaner areas, give it a fresh paint job.

9. FOOT TRAFFIC

5-10 people/day walk to them. Lots of bus riders and walkers.

None, homeless people that rent/live in storage space across the way.

Bus stop across street and hub bus stop .25 miles away. Auto traffic intimidates foot traffic.

None, just car traffic.

An even mix of car and foot traffic.

Loitering vagrants.

Yes, people asking what they (the business surveyed) do.

Bus stops @HEB sees a lot of people walking to HEB, sees people walking lots,

Apartment dwellers going to the bus stop.

20% are on foot, mostly apartment dwellers or work in business nearby.

None, other than transient people. Won't leave the door unlocked.

some foot traffic due to apartment complexes in the area, however most is car traffic.

Not much foot traffic except from apartments.

Does not apply.

Slow traffic during the day and evenings.

10. MOST ATTRACTIVE

“Big Star” Building, Wal-Mart, and HEB.

Taqueria on corner by Money Box, the school and the Hair Salon across the street by the Heidi Search Center.

Nacogdoches past O'Connor; Nature walk, library, nice restaurants; area between Thousand Oaks/O'Connor.

HEB, green space

post office.

Nacogdoches. Closer to 1604 is better.

O'Connor and Nacogdoches. Intersection; it has thriving businesses. Also Rolling Oaks Mall. New Wal-Mart, HEB @ Thousand Oaks, Post Office, Sporting Facilities. SACU received business of the year award for landscaping; area around Randolph Brooks FCU and strip center w/new Dunkin Donuts improved their location with fresh paint. I know that with the Wal-Mart being built, took many of the vacant buildings out which in my opinion has improved this section of Nacogdoches.

11. LEAST ATTRACTIVE

Closer to 410 @ Perrin Beitel, looks bad. Pay Day loan places and extended stay hotels. Southern end of corridor is "rough"; there are many small abandoned strip centers. Strip joints. Loitering drug addicts, homeless, graffiti. Racquetball, empty strip center, burned out strip club. Naco-Perrin, section 8 housing, and strip club. Vacant building next door-mattresses, recliners and cardboard boxes. Perrin Beitel @ Nacog, near turn in for Wal-Mart. All businesses are just stuck in Mish Mash. Abandoned racquetball and fitness center. Loan company on Perrin Beitel and Naco-perrin, vacant buildings, 24 hour night club. Perrin Beitel near 410, shopping center near Naco-Perrin where sneakers used to be. Racquetball and fitness vacant building. Strip center across the street from HEB on Perrin B. and the Martinez **Tire Shop**. Perrin Oaks Shopping Center and nearby apartments.

12. PLANS FOR BUSINESS

Nothing anytime soon. New sign for new tenant; repave the parking lot and paint. Owner of building is putting in something new. Considering move business to the south side. No plans, may sell business to another day care. Growth; currently on 3 acres, will expand moving meal on wheels or moving admin. staff. Interior remodel finished in March. Probably gone for good, looking on N. Side. Possibly near Shertz. Will leave when the lease is up and move to 1604/281. Interior remodeling, and replace faded sign. Waiting to see where the Wal-Mart entrances will be. Stay in place, not dependent on retail traffic. Probably move to smaller facility. redo landscaping to put in drought resistant plants to help in conserving water. Recently repainted outside of building otherwise, no additional plans. Continue as-is; business is fine. Grow and help the area realize we are here to help our community.

13. PRIVATE PROJECTS KNOWN

S.A. beauty school. Wal-Mart, Dunkin-Donuts. Pool company and car lot across the street, the groundwork is taking place. New Wal-Mart in northern part of corridor (a better part). high-end car detailing. None.

14. PUBLIC PROJECTS KNOWN

New business at Naco-Perrin and Perrin Beitel. HEB-Naco@ o'Connor.
Food-Court as anchor mom and pop businesses to be put in.
Nacog/Thousand Oaks road construction for drainage?
Bigger sidewalk near Bank of America; been working on Naco/Perrin Beitel intersection.
None.

15. LABOR POOL

Low class.

Employees from everywhere.

Saturated Hispanic area, questions emigration status. People have no or bad English language skills.

many qualified people with willingness to work.

many families in area directly around the credit union are hard working people and willing to do what is in the best interest for their neighborhood. This is evident by how well they keep their yards and homes.

QUESTIONNAIRE for
CORRIDOR STEERING COMMITTEE and NEIGHBORHOOD ASSOCIATIONS
CITY OF SAN ANTONIO NORTH EAST CORRIDOR REVITALIZATION STUDY

Name _____ Neighborhood _____ Date _____

Phone _____ Email _____

1. What is good about this location within San Antonio?
2. What is NOT good about this location within San Antonio?
3. Where do you and your neighbors **SHOP** for goods and services, and why?
4. What types of retail/service businesses are there **too many** of in the Corridor?
5. What types of retail/service businesses are there **not enough** of in the Corridor?
6. What should the City do to help revitalize the corridor?
7. Where are the 1 or 2 MOST attractive locations in the Corridor?
8. Where are the 1 or 2 LEAST attractive locations in the Corridor?
9. Do you know of any proposed **PRIVATE** projects within the Corridor? (new or remodeling)
10. Do you know of any proposed **PUBLIC** projects within the Corridor? (buildings and/or infrastructure)
11. What obstacles do you think there are for business locating in the Corridor?
12. What conditions hamper desirable retail & service businesses and industries from locating in the Corridor?
13. What are the characteristics of the Corridor workforce (types of people) or available labor pool? (hiring, qualifications, availability, willingness, attitude)

RESULTS OF SURVEY OF NEIGHBORHOOD ASSOCIATION REPRESENTATIVES

1. WHAT'S GOOD ABOUT LOCATION

It is home and it has good access.

Businesses have been there before in the well traveled main corridor.'

Lived there for 30 years, convenient to interstate.

Living there for 50 years, raised nearby, convenient.

Good north/south traffic flow. Some merchants are conscientious about beautification. Dist. 10 alliance gives awards for good landscaping.

2006, tried to start an initiative to clean up area.

Near interstate, good for transport, likes access to other areas of town.

Wurzbach Pkwy, wife travels it to go to work.

Newly renovated areas, city restriction o homeowners, but businesses are not held to the same restrictions.

It's home and it is easy to get around. Has been there for over 30 years.

Schools, people, wants to see it get back to how it was.

Lived there for 30 years, easy access to highways, looked like developing into nice neighborhood in S.A. It collapsed in the 1980's. Tax base is pretty good, wal-mart is coming in.

Easy access to freeways, linear trails which eventually will take you all over the city.

MacArthur Park is lovely too. The freeway system is also attractive. Los patios, Tobin park and Lady Bird Johnson parks are lovely. Lady Bird can stand some improvement.

Transportation access to everywhere (SC)

Morgan's Wonderland, access to Loop 410 & Wurzbach Parkway (SC)

Good schools (SC)

Located in the middle and ripe for development, some major retailers (SC)

2. NOT GOOD

Too many fast food restaurants, no curb appeal, would benefit from tasteful landscaping, more access for people to walk or ride their bikes, boutiques, art galleries, more ethnic restaurants.

A place where people can get out and see their neighbors, less cars.

gone downhill and moved in during 1970's.

Condos not built in the 1980's vacant land is empty.

public housing areas, section 8. Three fires in the least 4 years and to build 8ft. fence to separate.

Empty buildings.

Shabby looking, run-down, business and vacant buildings.

Vacant building across from HEB (the racquetball and fitness center). Could use trees and beatification.

"Perrin Oaks" with fence around it. Owners that not interested. Should have shelter at VIA bus transfer station.

Perrin Beitel completely fell apart after certain hours, did not want to get near the whole corridor.

Not enough clothing stores, family oriented places like churches, shopping; not even a thrift store.

Too many day loans and tattoo parlors.

Run Down, not pleasant place to drive-could look better.

Traffic is bad, lights not synchronized

panhandlers. graffiti. Businesses rundown and dirty.

Lots of tagging, poor or no maintenance.

Empty buildings everywhere, RV parking, and code enforcement.

Need to widen road; there is a lot of traffic during rush hours.

Last four years it went downhill. Austin hwy and Walzem rds got cleaned up. Crime, blight, pawn shops, money box element.

Poor regulations, no regulations-businesses.

Lacking shopping, there is traffic, and run down homes.

no landscaping, but opposed to median with trees because of lack of access for fire and emergency services.

Deterioration of the area (SC)

Poverty rate is double, near east side only 30% homeowner rate, signs (SC)

Pawn shops, loan sharks, tattoo parlors, adult entertainment (SC)

3. WHERE DO YOU SHOP?

At the pawn shops, tattoo, bars and payday loans.

Within the corridor.

CVS, HEB@ Nacogdoches and N. New Braunfels.

The Forum.

Target in the Forum; Wal-Mart on Nacog., HEB on O'Connor, The Quarry, not Perrin B.

West along 410 and south along Nacog.

Target, Wal-Mart on Austin Hwy. shoes from Payless on Perrin B. because to keep from business from closing

Costco, HEB.

HEB at Thousand Oaks and Nacog. Wal-Mart at 1604 or Austin Hwy. Ice House on Perrin B. past El Sendero.

Buys gas at Wal-Mart. Gets fast food from nearby.

The Forum, Rolling Oaks mall.

Used to go to HEB in corridor, goes to the Forum, will probably go to Wal-Mart.

Central Market.

Sprouts and sometimes CVS. Not a large variety of retail in our neighborhood. Sprouts is a bet seedy but does have some organic; likes to buy bulk w/o packaging.

Small businesses, restaurants, auto-related (SC)

WalMart, HEB, Lowe's, Home Depot and Sam's have what we need (SC)

4. RETAIL TOO MANY

fast food restaurants and only 2 other restaurants, Need restaurants that are not chains.

Auto, used car, mechanics, title loan, money box and gentlemen's club.

Fast Food (variety might be good).

Pawn shops.

Loan, Title/Payday.

Pawn shops, abandoned buildings/strip malls.

Auto repair shops, Auto body shops, taco trucks spread everywhere.

High turnover of tenants; fast food, auto shops.

Title loans, pawn shops, section 8 housing, plasma center.

Consumer friendly; bealls, books.

Gentlemen's clubs (SC)

Pawn shops, loan sharks, tattoo parlors, adult entertainment and Mexican restaurants (SC)

5. NOT ENOUGH OF

Homecare

Small businesses.

Clothes and shoe shops.

Health related restaurants-too many fast food franchises being sold.

Variety (like at the forum) shoes, and clothing shopping.

Grocery Store closer to 410. Large shopping centers not necessary.

Small business, office buildings, mom and pop retail merchants, Office Max, Hardware store and medical/doctor space.

doctors and chiropractor are far away.

Hardware stores, grocery store diversity, only 1 decent restaurant (could be more).

Crafts stores, fabrics stores.

Better grocery store.

large supermarket near Loop 410

Sustainable businesses.

Medical supply; hospitals, doctors, elderly care and rehab center for pain management.

Post office has good workforce, if another big employer like that was added it improves the corridor.

Day laborers; business next to army recruiting place.

Jobs for MacArthur HS students and large population in need of work in an uplifting environment.

Sushi Bar and art gallery!!!

Hotels, Alamo College Campus (SC)

Light industry, cold storage, commercial warehouse, educational, vocational schools, barber college, DRHorton homes. (SC)

specialty boutiques.

Have a variety of shops like the Forum, places for clothes and shoes shopping.

Book shops and a variety of restaurants.

6. WHAT SHOULD CITY DO

Incorporate more landscaping and trees to shade the walkways

access for walking and biking along our roads

Utilize the abandoned buildings or tear them down.

Storefront, parking lot beautification, green spaces or parks.

Widen sidewalks, better lines on streets and crosswalks.

Get rid of loan businesses and tattoo parlors and the vacant racquetball and fitness center.

Give grants for enhancing storefronts. Not in favor of rules/ordinance that dictate colors of paint as they restrict choices but some way to encourage enhancement. Also redo the driveways.

Make info available to small businesses (not pawn shops) for funding for landscaping, building, maintenance, facelifts/renovations and lighting. These could be in the form of grants or loans, etc.

Resurface street/ improvement, re synchronize the lights.

Local DARE officer program is a good program. Cellular Police officer on Patrol. Have a plan similar to the Austin Hwy and Walzem Hwy corridors.

Establish maintenance and up keep standards and / or enforce with as much vigilance as residential areas.

Require businesses to maintain their sidewalks as Neighborhoods are

City let is go originally, maybe create a 501c3 to coordinate the revitalization.

Have visual/curb appeal by codes or standards to make things match; revitalize in the manner of Austin Hwy.

Infrastructure studies, public works, parks landscaping, program support (facelift), TIF, branding, new traffic counts, develop lookout as destination, notify adjacent HOAs, lighting (CPS), Perrin Homestead. (SC)

Provide facts/Market actionable material for sales pitch, revitalize the neighborhood, allow no more crap. (SC)

Revitalize like Pat Booker: berm, trees, NE Lakeview College; and Vienna VA, develop a theme. (SC)

remove campsites off Thousand Oaks and behind Midnight Rodeo,

deal with crime at apartment on O'Connor. (SC)

Provide street lights in neighborhoods,

slow buses on El Sendero,

provide street maintenance (Avenida Prima), drainage; encourage maintenance of buildings and grounds

improve signs, enforce code on outside storage (dead cars near El Sendero/Thousand Oaks),

add green spaces

enforce code to clean up Playmates and Players Club

Improve the image, help to gain momentum (SC)

7. MOST ATTRACTIVE

Thousand Oaks and Nacog.

Intersection where HEB used to be.

The post office.

Near post office, north to Wurzback Pkwy, good access and important corner as good entrance to the corridor.

Taco Cabana looks nice and the Wendy's has good landscaping.

Los Patios, Tobin park, MacArthur Park, linear trail & some neighborhoods off Nacogdoches are lovely.

8. LEAST ATTRACTIVE

Nacogdoches and Perrin Beitel are both eye sores. No landscaping and store fronts are unattractive. shopping center across the street from CVS is an embarrassment.

Perrin B. strip is not great

Thousand Oaks/Perrin B. near the payless, a series of run down shops; vacant Bank of America.

The Building across from Perrin B. and Thousand Oaks, also many other vacant buildings and run down properties such as the Racquetball and Fitness building.

Yellow garage and paint shop across the street near nacog and bell.

Bell rd. and Higgin Cordoba tire shop, taco truck, noise, bright colors, looks like border town.

All the vacant buildings.

All is depressing.

Perrin B and 410 is "gangland".

Infrastructure issues; streets ok, sidewalks too close to curb, need new median on Perrin b, drainage ok, no bike lanes.

Playmates, triangle across from HEB, Perrin Oaks Plaza (SC)

Burned-down Playmates, Perrin Oaks Plaza, triangle across from HEB at Thousand Oaks (SC)

Tire shop (Cordoba) (SC)

9. PRIVATE PROJECTS KNOWN

Beautification; buildings are in bad shape, signage, paint assistance; code compliance.

Wal-Mart and Dunkin Donuts; fought off developer trying to build an apartment complex near neighborhood because there are not jobs for them.

McDonalds remodel, and Wal-mart.

new commercial buildings outside 410 on Nacogdoches that are appealing with nice landscaping. (SC)

Rumored HEB expansion (SC)

10. PUBLIC PROJECTS KNOWN

The hike and bike trails are a huge improvement to our area.

Community Center off Judson Rd @ Lookout.

Code enforcement, proactive effort to cooperate with businesses and property owners.

Senior Center on Thousand Oaks at Northern Hills (SC)

Post Office rehab (SC)

11. OBSTACLES

No uniformity; yellow and purple storefronts not matching.

Lack of vacant land.

Run Down and empty buildings, gang signs

.Neighborhood is getting old and this could hamper new businesses from coming to the corridor.

Undesirables moving in and crime.

Infrastructure, Abandoned Building (such as the racquetball and fitness center) burnt out players club.

Money is advantageous for them to move in and spend money to re do buildings that should be razed.

Low income residential areas.

It is an area that is already devoid of shops. They should populate the new buildings and not build new stuff as there is already a lot there.

Deterioration; people don't shop there, don't support local business, businesses don't work hard enough to bring neighborhood into stores.

overall run down look implies the area is not desirable place to attract people with real spending power.

“wrong side of the tracks” aura

Current situation of Corridor and adjacent neighborhoods (SC)

Status quo attitude (SC)

12. WHAT HAMPERS?

No trust or loyalty between business owners and neighbors.

Not attractive and there is no shade in the parking lots.

Many vacant buildings already; city is cooperative with the codes.

Overall appearance, run down and with gang signs.

Vandalism, theft (crime)

Seedy tattoo and pawn shops and wrong trashy businesses that are attracting a criminal element.

A BBQ place that's unattractive?

Property owner cooperation (SC)

Status quo attitude (SC)

Need mover/shaker involvement like GVH, Bartel Zachry and John Clamp (SC)

13. LABOR POOL

Good workforce; diverse, willing not enough local.

Folks are willing to work and something close-by would be good for them; not enough opportunity.

Mostly Hispanic and Spanish speaking.

Tried to hire in the area but there are a lot of retirees and blue collar workers.

OTHER/MISCELLANEOUS

Are there limits to truck traffic on Wurzbach Parkway? (SC)

4535 Schertz Rd Apartments (SC)

Neighborhood has a good graffiti program – removed w/in 24 hours (SC)

Kudos for the SAFFE program (SC)

Frost Bank area could be medical (SC)

QUESTIONNAIRE for VACANT PROPERTIES
CITY OF SAN ANTONIO NORTH EAST CORRIDOR REVITALIZATION STUDY

Name _____ Business Name _____

Property location _____ Date _____ Phone _____

Email _____

1. What is good about this location?
2. What is NOT good about this location?
3. What types of retail/service businesses are there **not enough** of in the Corridor?
4. What improvements are needed in Corridor infrastructure? (especially near your business)
(Streets, Curb cuts, Parking, Drainage, Sidewalks, Bicycle lanes, Electricity/lighting, Gas, Sewer and Water)
5. What other types of improvements are needed in the Corridor? (Transportation Access, Maintenance of buildings/grounds, appearance of stores, signs, Green spaces, Landscaping, Outside storage areas/yards, Mix of uses and crime)
6. What obstacles do you think there are to opening a business, developing or redeveloping in the Corridor?
7. What conditions hamper desirable retail & service businesses and industries from locating in the Corridor?
8. What should the City do to help revitalize the corridor?
9. Where are the 1 or 2 MOST attractive locations in the Corridor?
10. Where are the 1 or 2 LEAST attractive locations in the Corridor?
11. What are the plans for this property?
12. Do you know of any proposed **PRIVATE** projects within the Corridor? (new or remodeling)
13. Do you know of any proposed **PUBLIC** projects within the Corridor? (buildings and/or infrastructure)

RESULTS OF SURVEY OF VACANT PROPERTY OWNERS AND REPRESENTATIVES

1. WHAT IS GOOD?

Good business service

Rents are low to very low.

At the doorway of development (Walmart)

Proximity to Loop 410.

Large trade area

Post office and Wurzbach Pkwy.

The elementary and middle schools are outstanding.

Loop 410 and the visibility, can be a destination center because of location.

Part of NE corridor.

Access to O'connor and I-35.

Access to highway and freeway.

Seems good, has arteries close-by.

Restaurants nearby. Access to 410/35

Property is in area of positive activity.

Access to bus lines

Planet Fitness; since they have come in their security has really helped the graffiti situation, however dumping is still a problem.

Has invested money, but holding off. Putting more into property.

Area seems to be active; values on the upswing.

2. WHAT IS NOT GOOD

Bad First impression for clients; Neighborhood is tired, too many run down centers..

access only one entry from loop 410 or through the Academy parking lot.

Zoning is obsolete need C-2 to sell the building the neighborhood will oppose the change.

surrounding neighborhoods, 1000 Oaks to 410 particularly bad.

Lots of lower end housing, public housing and homeless.

The typical non-retail employment in the area is blue collar with little time or income to support much business abandoned buildings in the corridor.

The cement quarry.

Not a major thoroughfare, surrounding depressed demographics.

Has a run down look.

Low rents.

Vacant buildings.

Drainage is bad. More lighting needed. Shopping center floods.

Vehicles stored in yard.

Restaurants close at 7. Bustling during the day, dead at night.

Transients; keep area clean to discourage them.

Crime is a serious problem. Police presence needed.

Homeless problem. Too dangerous to work at night; Homeless use drainage ditch. Graffiti.

Area is tacky, needs greenery.

South of Thousand Oaks, on Perrin B., homeless problem is bad: panhandling. SAPD patrols for two weeks then problem returns.

3. NOT ENOUGH OF

Apparel.stores

National retailers. 3

The kind that used to be there; western wears clothing, furniture, etc.

Not enough service oriented businesses.

Medical

Upscale retailers.

Service oriented retail.

4. INFRASTRUCTURE IMPROVEMENTS

Cross access easement? Sidewalks, gas, sewer and water lines.

On naco-perrin probably nothing on the other streets. Maybe sidewalks.

Perhaps better lighting.

Streets, curb cuts, parking, drainage, sidewalks, bicycle lanes, elec./lighting, gas, sewer and water.

Any improvements make things look different but **sidewalks** are most important.

Lighting other than at intersection of thousand oaks and Nacogdoches.

Curb appeal improvement of any kind throughout the corridor.

Sidewalks on Perrin Beitel and Naco-Perrin.

Drainage, bar ditch has many culverts stopped up.

Pothole in front of property. Only improvements were spot repairs.Road @ bus hub by Thousand Oaks especially bad.

Improvements as done to Pat Booker Rd. to Universal City. Illumination, Xeriscape, and street lights.

more trees; the area is "aesthetically challenged". More illumination.

Illumination, police patrol, clean up corridor.

Mow/maintain the drainage ditch that attracts transients.

5. OTHER IMPROVEMENTS

Need to level vacant buildings and improve the remaining store fronts.

Crime is an issue on Perrin B., façade renovation (rents may be too low for that)

Crime

get a handle on the crime and homeless.

All of the above, especially deal with the run down look of the street.

All except transportation and bus service.

Xeriscape.

6. OBSTACLES

Owner/landlord doesn't improve property (plumbing) because of future potential (area is a "dead zone")

Appearance.

Low rents.

Code Compliance, some spaces can't be rented because the intended use will not make code.

Perception of a high crime area.

The area is in decline and if change started tomorrow it would be years before a complete redevelopment could occur. It would mean that landlords would be willing to have dark space instead of check cashing business.

The general condition of buildings along the corridor.

existing mix of property uses.

Zoning, - neighborhoods so close to businesses make it difficult for any changes that abut residential.

First impressions: no national retailer would want to be located next to many of the existing businesses.

Bad roads, and congestion.

Corridor appearance.

7. CONDITIONS THAT HAMPER

First impressions no national retailer would want to be located next to many of the existing businesses.

Crime

The existing property use mix.

The general condition of the buildings along the corridor.

National retailers will not move into any area of no or stagnant residential growth.

People don't stop to use businesses they use the corridor or transportation from here to there.

The **condition** of many of the buildings are not attractive to "desirable" users.

Area **demographics**, not a lot of **disposable dollars**.

Current tenant mix (needs to be upgraded).

Homeless, the lighting, and the general tacky appearance of the corridor.

-

8. WHAT SHOULD CITY DO

Any appearance enhancement would help; still about 3-5 years to recovery.

Police patrols. Follow-up on graffiti and dumping violations because it is not happening now.

Safety: illumination and police patrols.

Ordinance with façade standards.

There is a stigma of **high crime**, **financial incentives** for office (day-time) users with disposable income.

Financial incentives are always the answer.²

Incentives to building owners to revitalize their properties.

Tax abatements and **code enforcement**.

Sidewalks in Perrin B.

More police for crime issues.

Time should take up slack. Glad to sell building.

General appearance with consistent signage.

9.FOOT TRAFFIC

10. MOST ATTRACTIVE

Lp 410, Thousand Oaks and Nacogdoches and O'Conner and Nacogdoches.

1000 Oaks at Nacog.

1000 Oaks intersection.

The whole area from 410 past 1000 oaks is in a state of slow decline.

Nacog./O'Connor

11. LEAST ATTRACTIVE

The tire shops, and tattoo parlors. Also the pawn shops.

Perrin B. from Chacho's to Wurzbach Pkwy and Naco Perrin.

Naco Perrin x 3

410 to 1000 oaks.

The quarry

Wurzbach Pkwy and Perrin B. and Naco Perrin.

Quarry and Wurzbach Pkwy.

12. PLANS FOR PROPERTY

Rent it at market rates and wait out tough times.

May build on lot. Has owned the lot since 1995.

Selling soon.

Selling or Leasing.

Possible dollar store or gym.

Continue to lease building. Owner will not spend finish out dollars in this location.

Tenants must fix up space themselves.

Lease space as users become available.

Property is for lease not for sale and although the property is a bank w/drive thru lanes it will not be sold or leased for financial institution.

former Lacks store will end up as a call center or trade school. *In the past, space in the center has been rented to a smoke shop, bar and tattoo parlor. Quality retailers will not rent near these types of users.*

Remove 12,000 sq. ft. of existing strip center adjacent to Gold's Gym and two pad sites between the bank and the DarQue Tan center. one of the pads will be a Whataburger.

property has a price on it but it is high enough to preclude offers. Seller has a window for selling the property but is still about three years out.

Building is for sale, have had offers, but all require rezoning, which is impossible.

75,000 sq. ft. with 44,000 leased, owner will not subdivide into small spaces - large leases only. Owner will supply finish-out dollars.

Building is for lease and owner will subdivide. Looking at two strong tenants for entire building. Showed building to several Charter Schools both indicated that it might not be a safe area for children.

Continue to operate.

13. PRIVATE PROJECTS KNOWN

Wal-Mart (8) and Skymine (3)

ITT training institute is doing well and may need more space.

Whataburger (2)

Possibly a Dollar store.

14. PUBLIC PROJECTS KNOWN

Everyone said "none" or "no".

15. LABOR POOL

It is definitely a blue collar area.