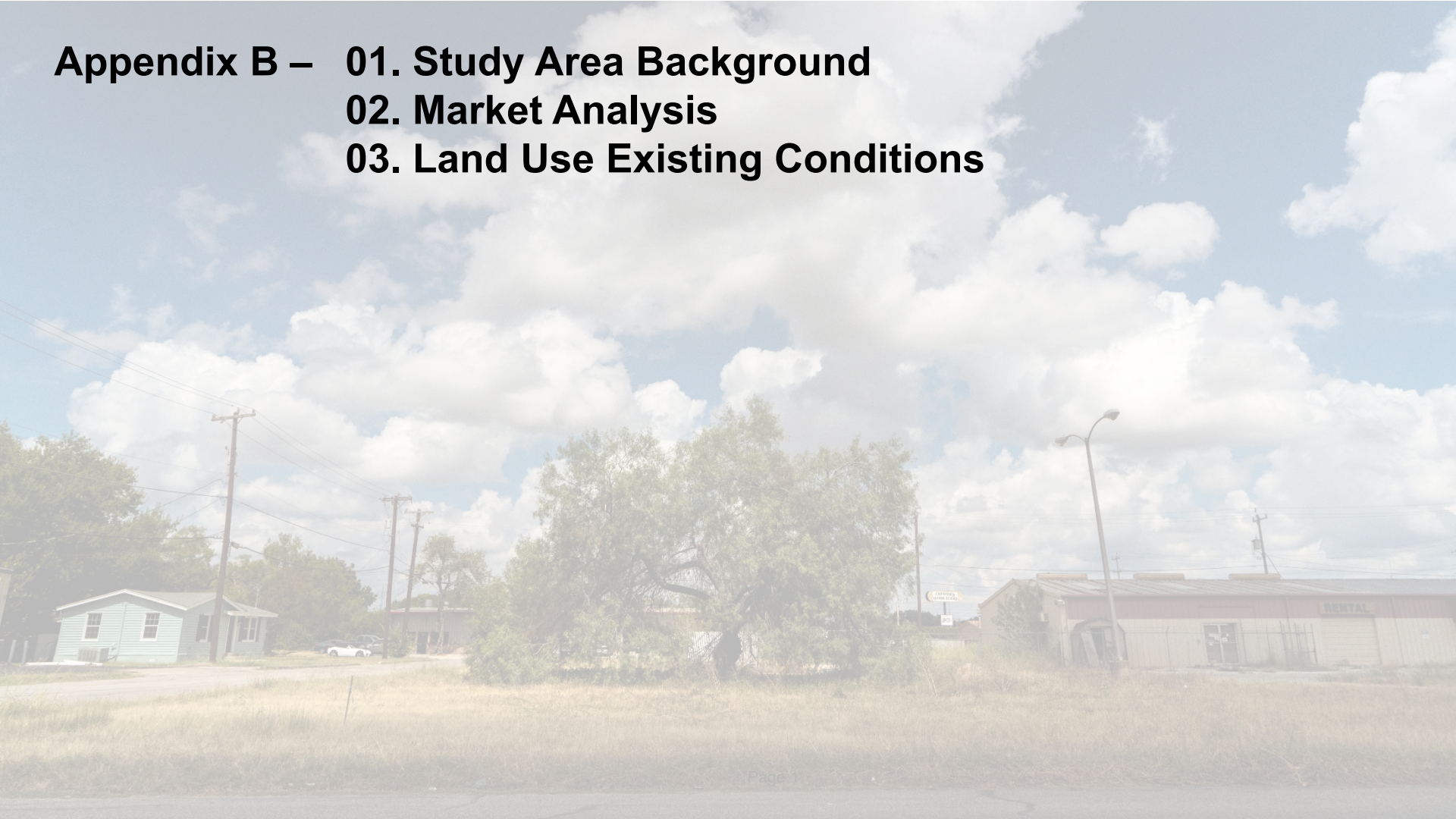
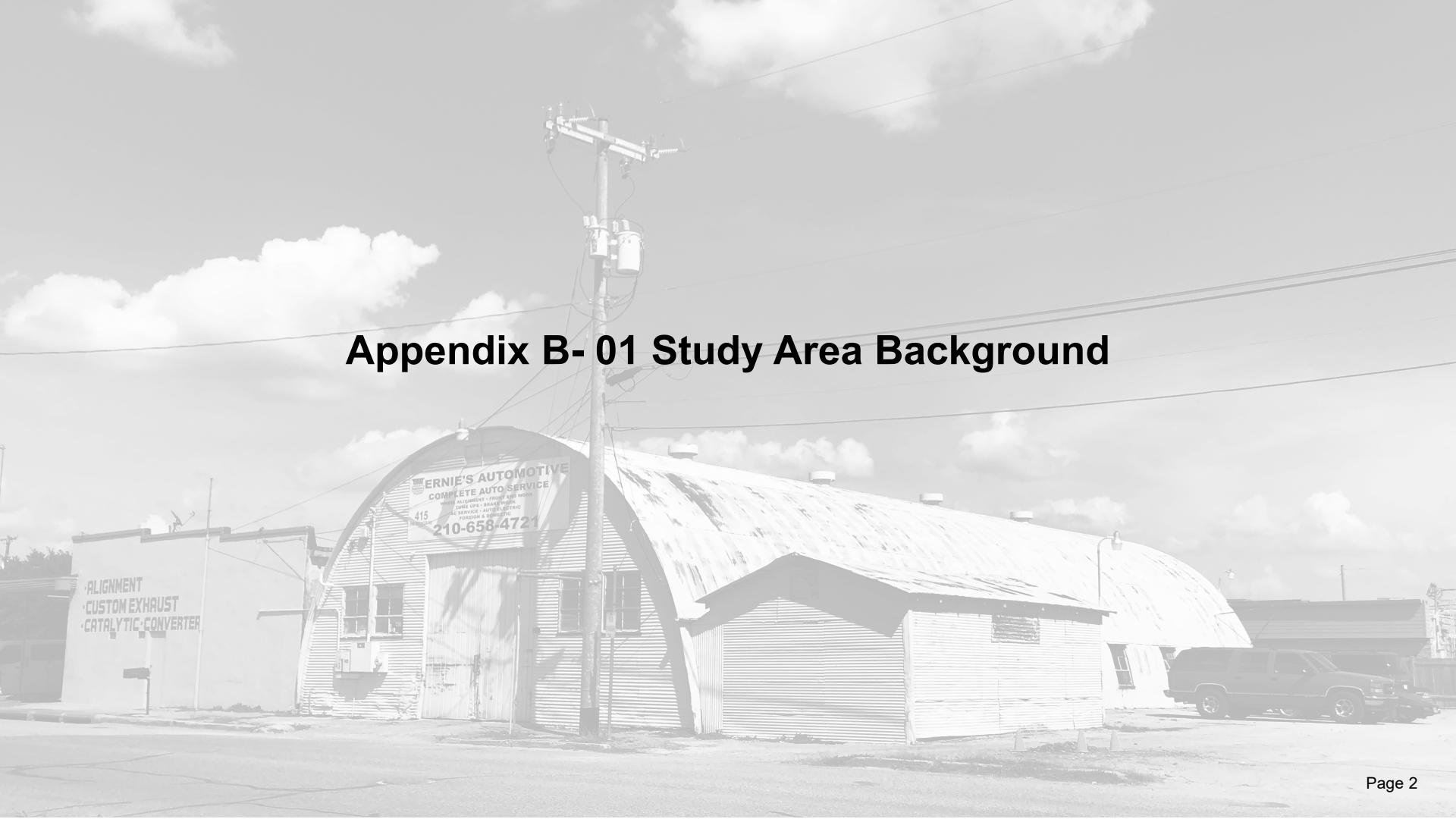


Appendix B –

- 01. Study Area Background**
- 02. Market Analysis**
- 03. Land Use Existing Conditions**



Appendix B- 01 Study Area Background



Universal City Context

- As of 2017, median home values in Universal City were 2.6 times greater than median household income. With a U.S. average of 3.4, the implication is that existing housing is priced at a 24% discount relative to expected value.
- Reflective of older build real estate, the average apartment in Universal City rents at a discount to adjacent communities. As of 2017, median gross rent was \$927 per month, slightly below both San Antonio MSA and U.S. average, and well below median rent in Live Oak.
- Historically, Universal City was closely associated with Randolph AFB, and as a result, tended to have a larger share of residents who were born outside of Texas. Notably, since 2010, new residents to Universal City are more likely to be born in Texas.
- Housing units built in Universal City since 2010 tend to be slightly larger (about 200 square feet) and are priced at a 10% premium over existing housing.
- As of 2018, retail rents in Universal City were \$16.60 per SF, lower than all of its neighboring cities except Schertz. Retail rents in Universal City increased at an annual rate of 2.4% between 2010 and 2018, faster than all of its neighbors except Converse (4%).
- In Universal City, a majority of jobs (1,200) are in restaurants and education; other core sectors include auto repair. The restaurant industry is more concentrated in Universal City than in most of its neighboring towns. As of 2017, restaurants had a 1.9 LQ in Universal City, only Selma was higher at 2.8.
- Gross retail sales in Universal City increased at an annual rate of 2.4% between 2010 and 2018, faster than neighboring cities.
- Since 2002, Universal City has increasingly become a bedroom community, with roughly 600 fewer jobs supported in the community offset by increase of about 2,000 people who work elsewhere in the region.

Recent Growth; Approaching buildout

While Universal City has added residents faster than U.S. average since 2010, growth has been sustained by an increasingly limited number of new residential subdivisions. As build-out approaches, growth will slow, unless strategies to support infill redevelopment at higher densities are pursued. The community's stock of older apartments, which rent at a discount to prevailing area rents, is a primary concern.

At the Center of a Growing “Donut”

The adjacent communities of Selma, Live Oak, Converse, Cibolo, and Schertz are poised to see significant population growth (and increasing affluence) in coming years. At current rates, these communities could grow from about 111,000 residents in 2017 to more than 190,000 residents by 2030. Given unique constraints created by the Cibolo Creek Corridor, future residents must drive around Universal City to access employment centers in San Antonio. For Universal City, infill redevelopment will allow the community to compete for a share of an otherwise growing market, linked to provision of increased density, enhanced amenities, and supportive retail, leveraging a shorter commute into San Antonio.

Retail; Challenges, but Improvement

Clearly, new retail projects (Forum Shops, Ikea, etc.) are pulling retail sales out of Universal City. And as a result, vacancy rates among older shopping centers have increased, to an extent. At the same time, while a pull factor of 0.8 would point to relevant leakage of retail sales, pull factors have improved since 2010, from roughly 0.6 to about 0.8, a positive sign. Retail sales have grown since 2010 at rates generally consistent with adjacent communities. Also, while Universal City lacks a significant number of national chain stores, its retail base is more insulated from the currently unfolding “retail apocalypse”, which will impact established retail districts.

The Aviation District

The district itself is challenged by an existing stock of significantly older and smaller single family homes. The analysis shows that existing residents are seeing value in the neighborhood and renovating, and developers are coming in to “flip” houses as well.

Regional Context

- The San Antonio MSA continues to grow, as evidenced by 191,000 new jobs and 375,000 new residents since 2010. These metrics place San Antonio among the top five Texas metropolitan areas. In context with job growth, while average incomes are only slightly below US average, rates of income growth since 2010 have been slower.
- While the San Antonio MSA is well known as a “Military Town” with a corresponding location quotient of 1.2, other concentrated sectors include oil & gas (LQ 2.0), and Finance and insurance (LQ 1.5); All 3 sectors added jobs between 2010 and 2018, led by health care, accommodation, and food services.

Universal City Context

- While Universal City has added residents faster than U.S. average since 2010, growth has been sustained by an increasingly limited number of new residential subdivisions; 393 housing units were added, against a reported 9 housing unit demolitions. As the community approaches build-out,

growth rates will inevitably slow, unless strategies to support infill development at higher densities are pursued.

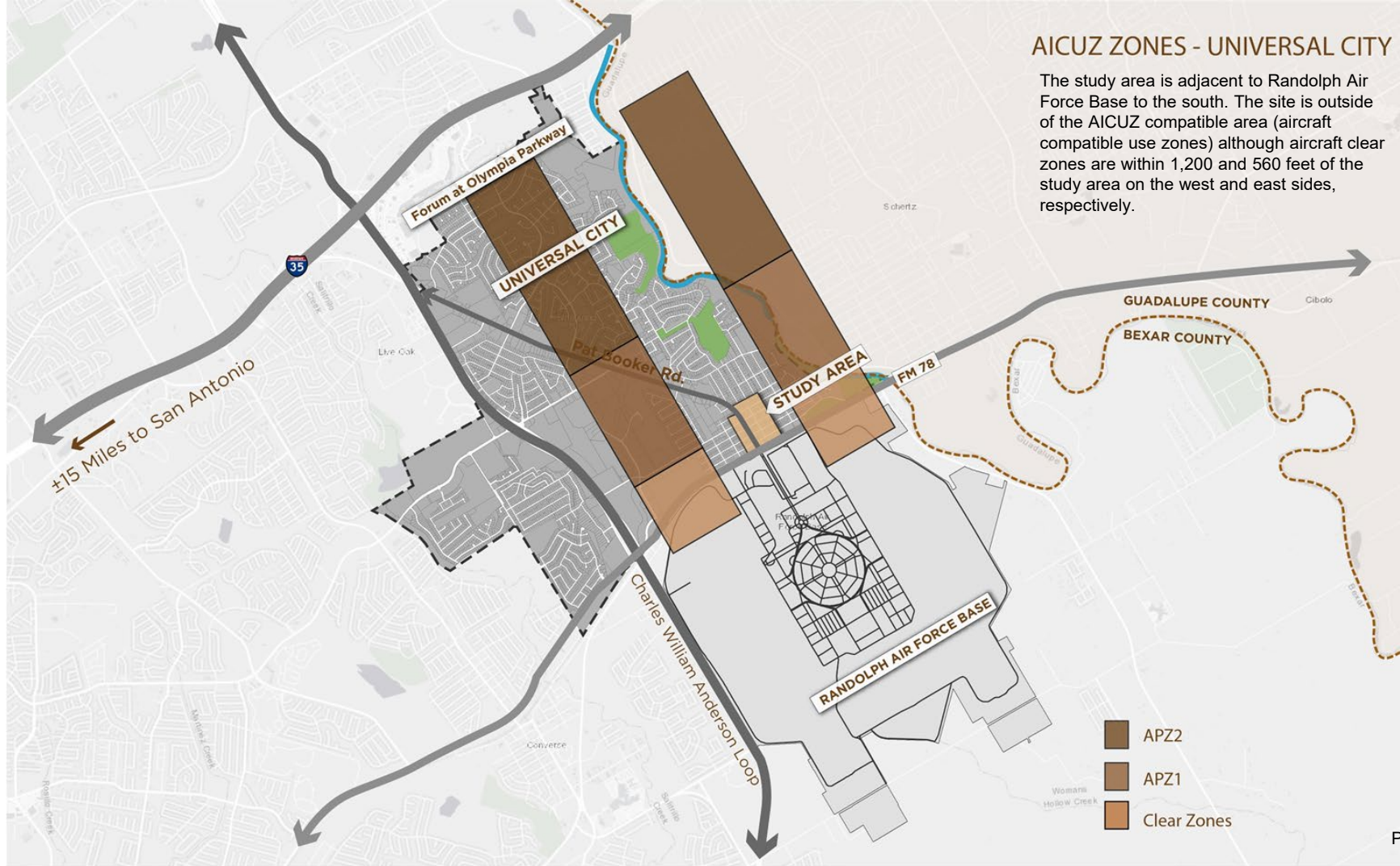
- Between 2010 and 2019, 23% of Universal City parcels were sold once, and 7% had 2 or more transactions. The remaining 70% of residential parcels did not transact over this period. In total, the transaction data speaks to only modest structural change in the community.
- While median age, average household size and household structure trends closely mirror regional and national averages, adjacent communities have significantly larger shares of married couples (i.e. family households), with generally lower median ages and larger average household sizes.
- Reflective of a community approaching build-out, a majority of existing residential and commercial real estate in Universal City is older than neighboring communities. For example, about 50% of Universal City’s housing stock was built before 1978.



The study area is approximately 1.18 square miles. It is in the southeastern portion of Universal City and touches the city limit boundary to the south along FM 78.

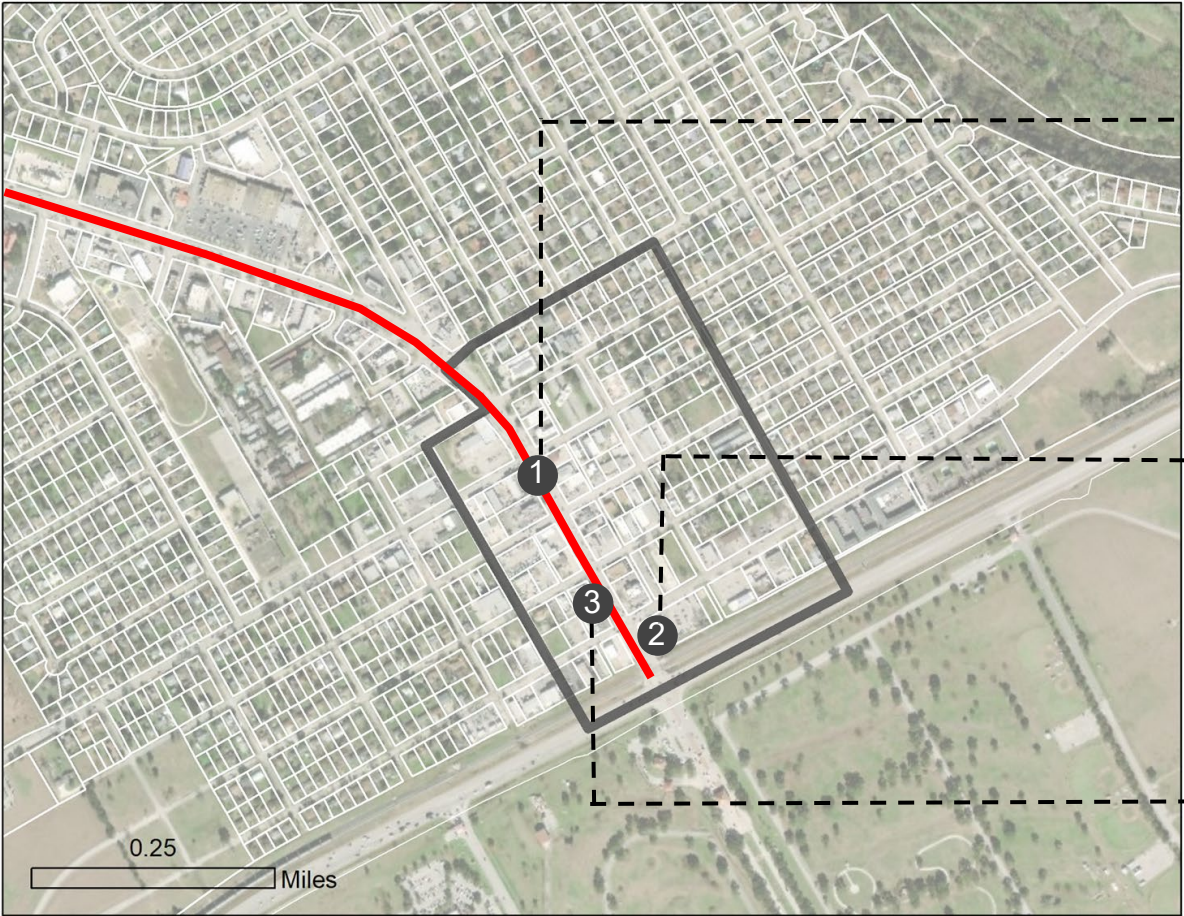
AICUZ ZONES - UNIVERSAL CITY

The study area is adjacent to Randolph Air Force Base to the south. The site is outside of the AICUZ compatible area (aircraft compatible use zones) although aircraft clear zones are within 1,200 and 560 feet of the study area on the west and east sides, respectively.





Historic Ccharacter - The Commercial Strip



The first four blocks of Pat Booker Road in 1948. The curb at the left leads to E Byrd Blvd.

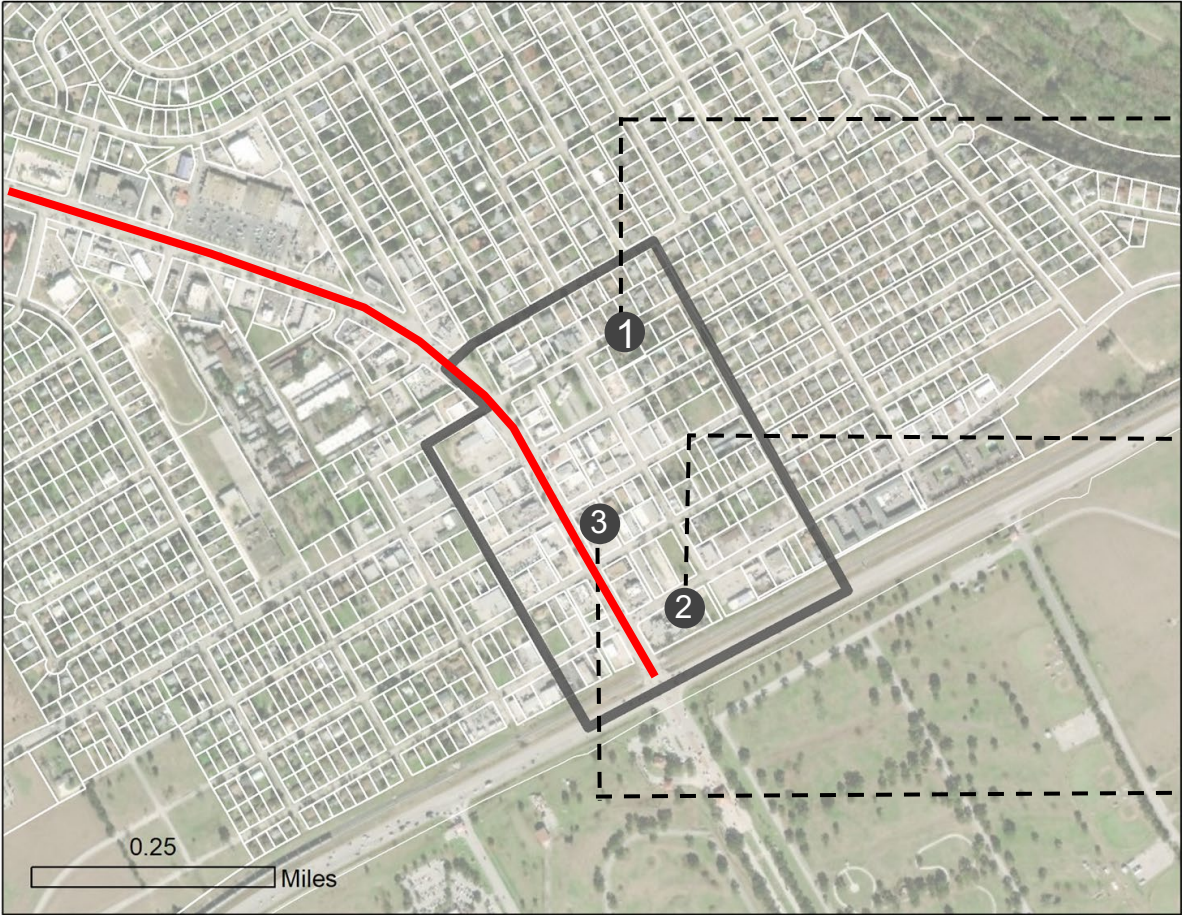


A postcard of the Outpost, a military tavern that opened in 1941. The building no longer exists, but the postcard reflects the corridors historical relationship to the base.



207 Pat Booker Road, currently Carrera Optical, is one of the oldest commercial buildings in Universal City (built in 1942).

Present Conditions



The study area outside of the corridor is single family. These houses are small compared to those in the rest of the city and also sit on smaller lots than typical single family elsewhere in town.



An auto repair shop in the 200 block of E Aviation Blvd. This is a common use type along the corridor, where small 1-2 story commercial buildings are also the norm.



Cars and parking lots (both formal and informal) dominate the frontage along Pat Booker, as well as adjacent connecting streets.

Appendix B- 02 Market Analysis



AECOM conducted interviews with a cross-section of community interests, including residents, business owners, and larger employers. Key insights from the interviews included:

- Universal City and the Aviation District serve as the primary gateway into JBSA Randolph. With the advent of the joint base structure in 2005, JBSA Randolph has evolved, with less on-base housing and fewer families living on base, and a larger share of contractors in addition to retirees. Data would suggest that the number of people accessing Randolph has increased since 2015.
- JBSA Randolph flight path safety zones extend over a large portion of Universal City. Within these zones, the Military remains concerned about building use. Outside of these zones, there still are corresponding runway terminal instrument approaches for which the Military remains concerned about the height of proximate buildings.
- Reflective of its training mission, JBSA Randolph is expected to support the new jet trainer which will eventually replace the T-38 Talon.
- The Aviation District is a focal point for basic challenges.

First, while the community is largely built out, limited remaining vacant land is largely concentrated in the Aviation District. Second, the majority of older residential and commercial buildings in the community are particularly concentrated in the Aviation District, an area which is also impacted by older water / sewer infrastructure, and limited sidewalks.

- The Aviation District is also challenged by the reality of rush-hour traffic associated with the base entrance, and a gradually increasing volume of perhaps 10-20 daily freight trains moving through an at-grade crossing at Pat Booker, which is not established as a quiet zone.
- While Universal City has historically shared a close, arguably synergistic connection with JBSA Randolph and benefited from on-base amenities, new families that are moving into the community today are less likely to be military connected, and cannot access on-base amenities, so these need to be provided in the community.
- Interviewees commented on community need for a primary public gathering place, as well as amenities for seniors.

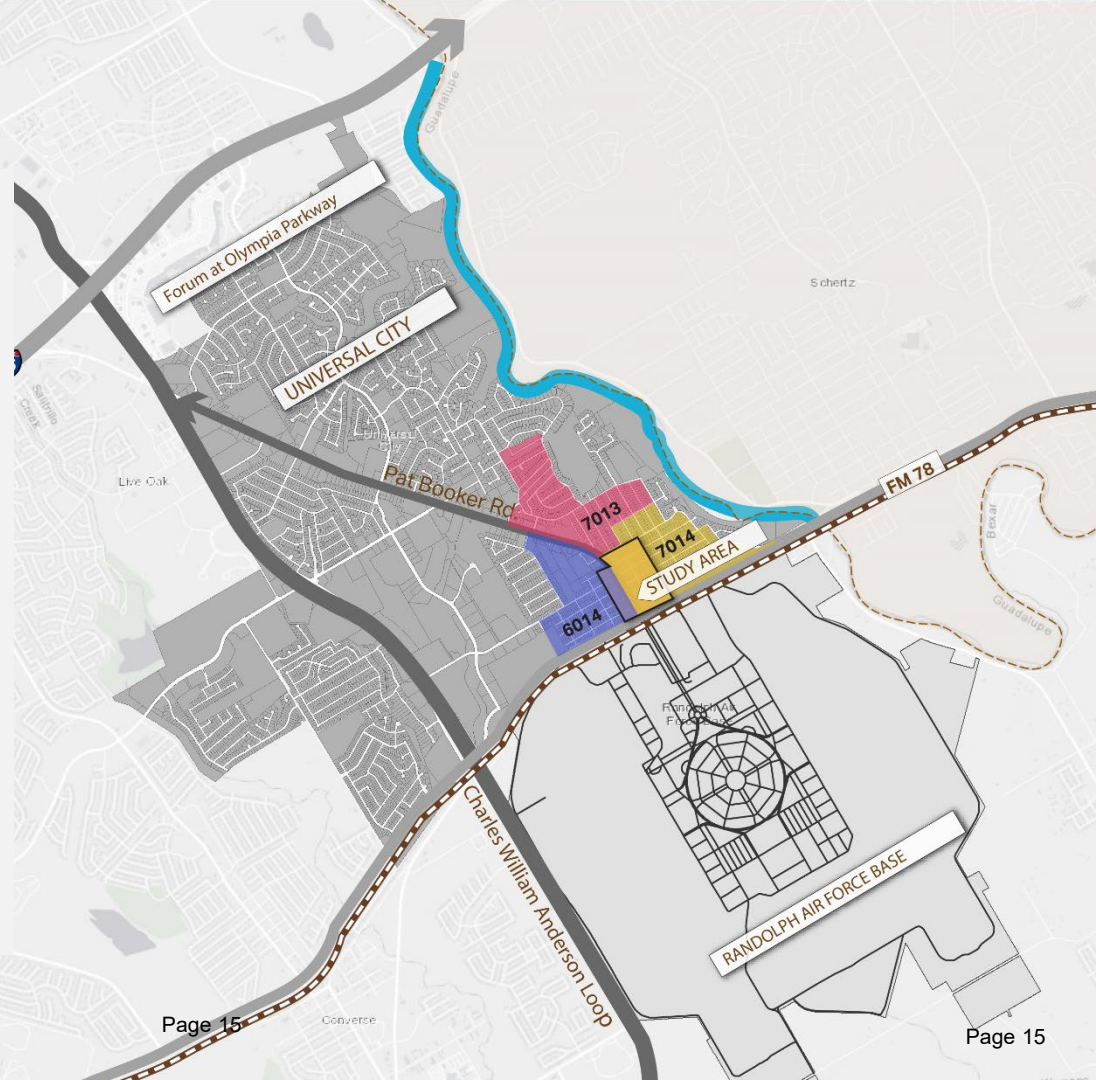
- The Cibolo Creek corridor to the east serves as a barrier to the flow of traffic from east to west. As a result, while Universal City sits at the center of a dynamic and rapidly growing suburban corridor, this barrier forces a majority of traffic volumes to follow either I-35 or FM 78 to access regional employment centers. With growth in volumes along I-35 and 1604, FM 78 has become an important reliever.
- While the Aviation District serves as a gateway into Universal City, linked to the intersection of FM 78 and Pat Booker, the lack of definitive signage, branding, or streetscape elements in this district today constrains opportunities.
- Interviewees all commented on the concentration of Mexican restaurants, auto repair facilities, and churches in the community, in addition to perspective on the impact to existing retail along the Pat Booker Corridor following the opening of the Forum Shops. Lack of diverse restaurant options was a concern.
- Property owners provided broader perspectives about the city, its available markets, and their relationship with the City government. In general, property owners lamented the impact of more aggressive code enforcement efforts on older buildings.
- Interviewees spoke of modest concern about availability of more diverse housing options, particularly so that seniors can remain and age in place, in the community.
- While interviewees commented on awareness of eventually need for redevelopment, sensitivity about density was apparent.

Demographic Trends



The following geographies are used in this analysis:

- United States (USA)
- San Antonio Metropolitan Statistical Area (MSA)
- Bexar County, Texas
- Comal County, Texas
- Adjacent communities to Universal City, including Live Oak, Schertz, Converse, Selma, and Cibolo
- The City of Universal City, Texas
- A defined study area within the Aviation District covering 3 block groups (7013, 7014, 6014), and referred to as “Target Block Groups” in this document.



Data Sources

EMSI – a private source for labor market data. For this analysis, employment data was collected for the San Antonio Metropolitan Statistical Area (MSA).

Costar – a private data source for commercial real estate data, including rents, vacancy, and construction.

ESRI Business Analyst – the Business Analyst extension pack from ESRI was used to collect data on businesses in Universal City. Business Analyst collects this information from Infogroup.

U.S. Census Bureau – Data from the Decennial 2010 Census and the American Community Survey (ACS) was used for demographic analysis in this report.

Bexar County Appraisal District – Appraisal data and property sales data was retrieved from the Bexar County Appraisal District and used in this analysis.

Texas Comptroller's Office – Sales data by city was collected from the Comptroller and used to compare retail activities by city.

Department of Housing & Urban Development (HUD) State of the

Cities Data System (SOCDS) – Database on historic building permits by jurisdiction

Zillow – Home listings

Terms

LQ – a measure of relative concentration between a large geography (e.g. the United States) and a sub-geography (e.g. Bexar County).

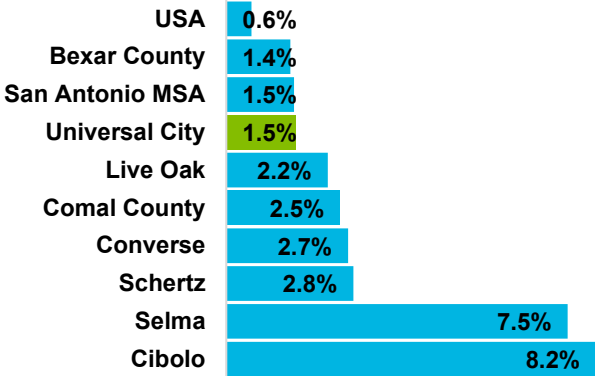
CAGR – Compound annual growth rate, an annualized percentage change over time. It provides a smoothed rate of growth that is consistent between metrics.

North American Industrial Classification System (NAICS) Code – A standardized system for grouping places of work based on economic activities performed at the place. The Bureau of Labor Statistics (BLS) provides information on each NAICS Code in the U.S.

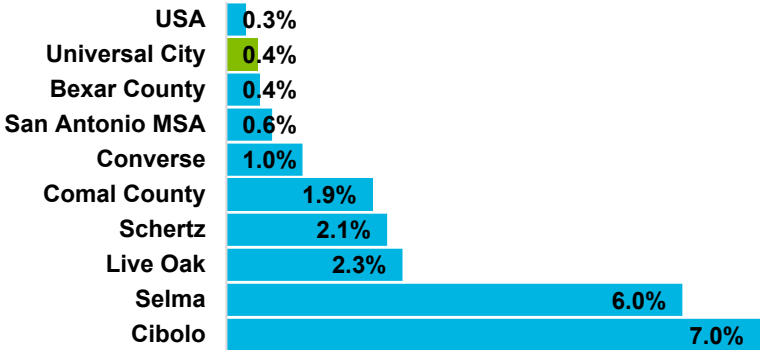
Industry - An industry is a specific NAICS Code. For example, NAICS code 1110 is crop production activities.

Between 2010 and 2017, while Universal City’s population growth rate outpaced U.S. averages, it fell below more consequential growth rates in the neighboring communities of Selma, Live Oak, Converse, Cibolo, and Schertz. With generally more abundant vacant land remaining, the adjacent communities are poised to see significant population growth in coming years. At current growth rates, an increase in population from about 111,000 residents in 2017 to roughly 190,000 by 2030 is not out of the question. As shown on the following page, the makeup of Universal City households closely mirrors U.S. averages, with about 34% of households in non-family households, with Schertz and Cibolo having significantly higher shares of married family households.

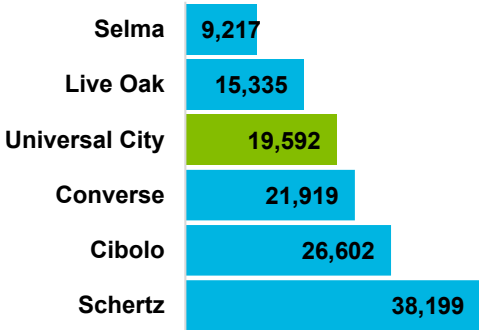
Population CAGR (2010-2017)



Households CAGR (2010-2017)



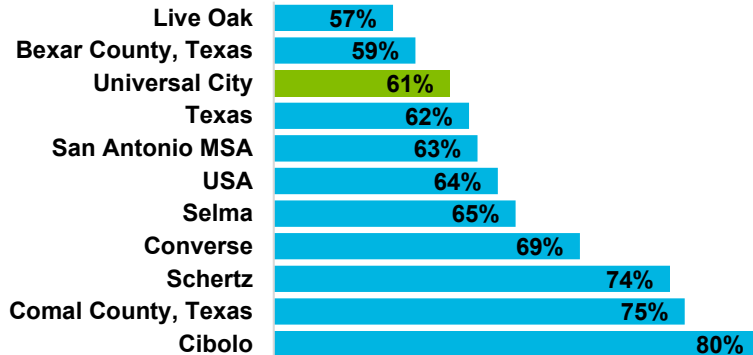
2017 Population



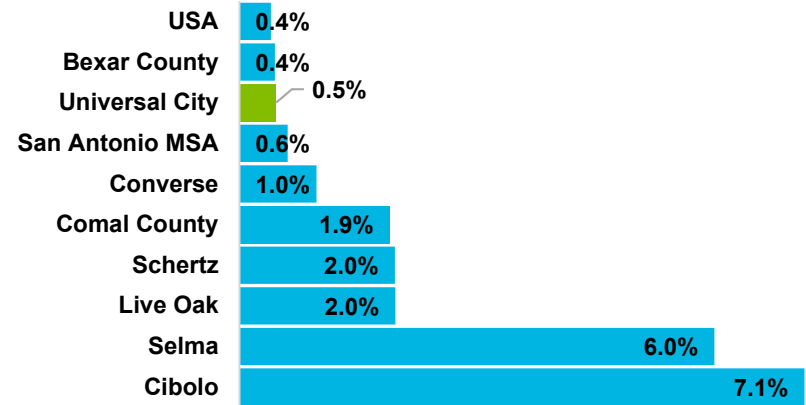
Area	Households by Household Structure (2010)					Households by Household Structure (2017)				
	Family			Non-Family		Family			Non-Family	
	Married	Single Male	Single Female	Alone	Not Alone	Married	Single Male	Single Female	Alone	Not Alone
Universal City	47%	5%	14%	28%	7%	48%	3%	15%	29%	5%
Live Oak	46%	5%	13%	29%	7%	41%	6%	10%	36%	7%
Schertz	61%	5%	12%	19%	4%	61%	5%	12%	19%	3%
Selma	58%	5%	10%	21%	7%	52%	2%	16%	24%	5%
Converse	52%	6%	18%	19%	5%	53%	7%	17%	19%	4%
Cibolo	70%	3%	10%	13%	3%	71%	3%	12%	12%	2%
USA	48%	5%	13%	27%	7%	48%	5%	13%	28%	6%
Comal County	61%	4%	9%	21%	5%	61%	4%	10%	21%	4%
Bexar County	46%	6%	17%	25%	6%	46%	5%	16%	27%	6%
San Antonio MSA	49%	5%	15%	24%	6%	49%	5%	15%	26%	5%

Linked with construction of 393 new housing units since 2010, Universal City is estimated to have 20,300 residents in 2019. Between 2010 and 2017, the number of households in Universal City increased at an annual rate of 0.4%. Similar to housing units, this rate of growth was faster than U.S. average but lower than growth in adjacent areas. US Census data also suggest that a majority of households (61%) own rather than rent, which is slightly below US average.

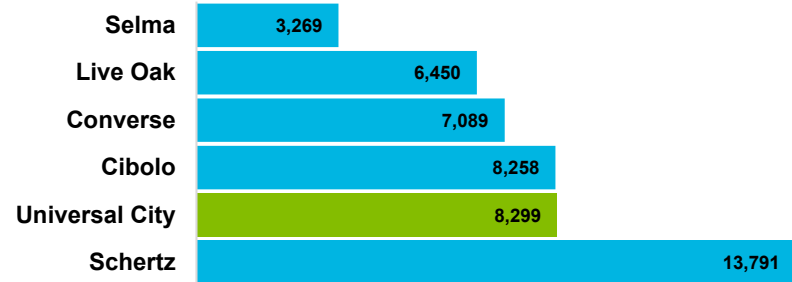
Owner Occupied Share of Housing (2017)



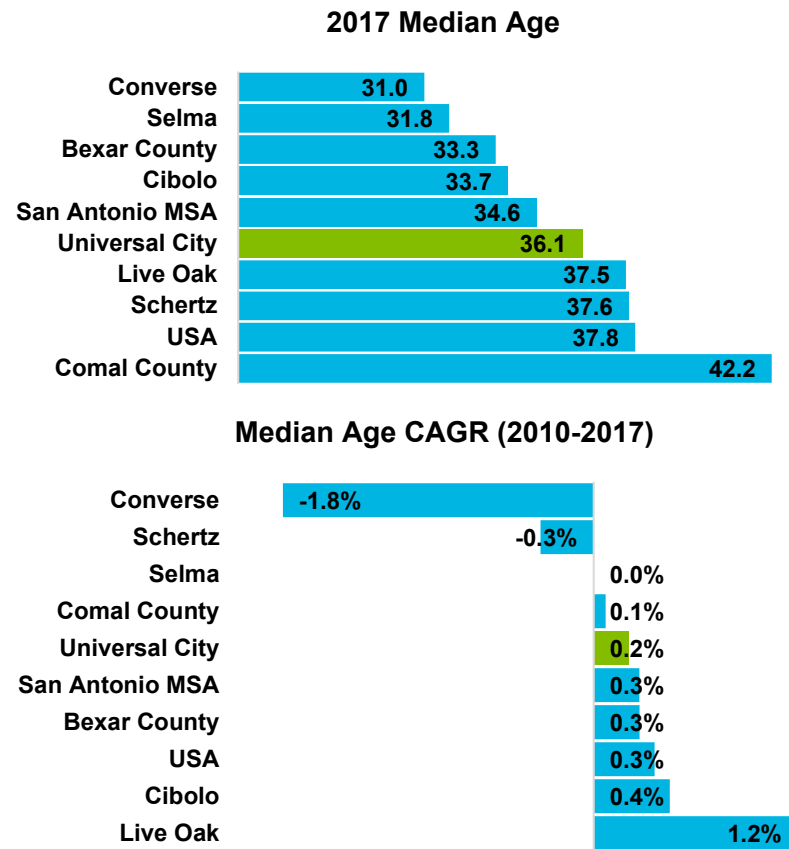
Housing Unit CAGR (2010-2017)



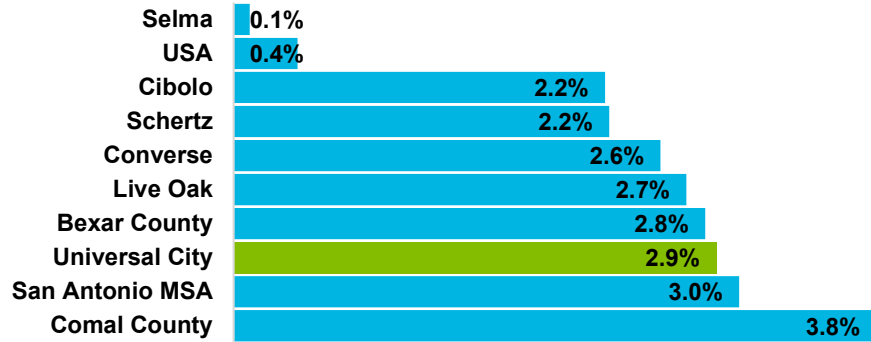
2017 Housing Units



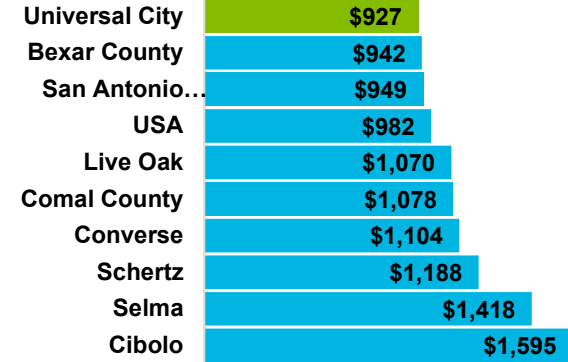
- As of 2017, Universal City had a slightly older median age in comparison with regional values (San Antonio MSA @ 36.1 compared to 34.6). At the same time, median age estimates for Universal City and the region remain below U.S. averages (37.8).
- In context, median age estimates for Live Oak and Schertz reflect a slightly older population, in context with Comal County (42.2 years)
- Also notable is that growth rates in median age since 2010 in Universal City speak to only a moderate pace of change (annual increase of 0.2%), well below US average.
- Trends for Universal City stand in stark contrast with Converse (getting younger) and Live Oak (getting older).
- Trends regarding average household size, median age, and population growth ultimately have significant bearing on demand for housing.



Median Home Value CAGR (2010-2017)

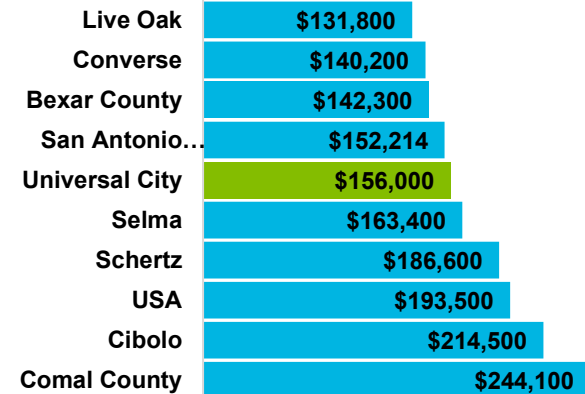


2017 Median Rent



- Reflective of generally older rental housing stock, Universal City had the lowest median rent of all geographies included in the analysis, as reported by the US Census American Community Survey. Equally, median rents in Universal City have underperformed against all benchmarks.
- Median home values in 2017 stood at \$156,000, close to regional averages (\$153,000), and higher than in Converse and Live Oak, but lower than in other benchmarks. Similarly, home values have increased at an annual rate of 2.9% between 2010 and 2017, faster than U.S. average and all of its neighboring cities, but slightly below the San Antonio MSA rate (3%).

2017 Median Home Value



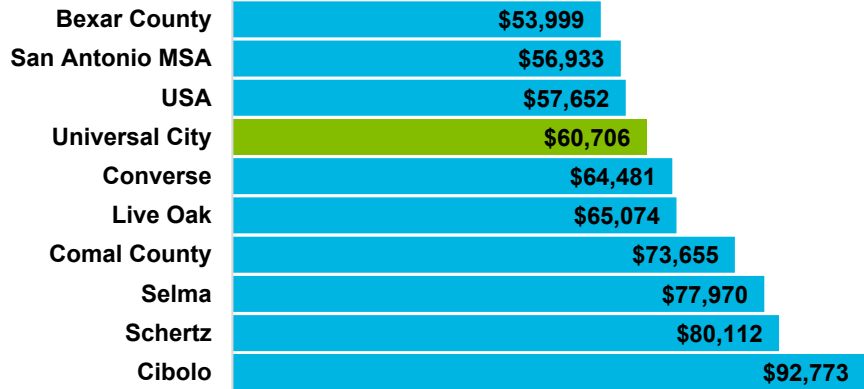
Household Income

Median income in Universal City were slightly higher than U.S. average. Schertz and Cibolo support the highest household incomes, but have seen slower rates of income growth since 2010. Income trends generally reflect on differentiators for communities such as Schertz, with considerable vacant land and quality schools linked to construction of new housing at higher price points.

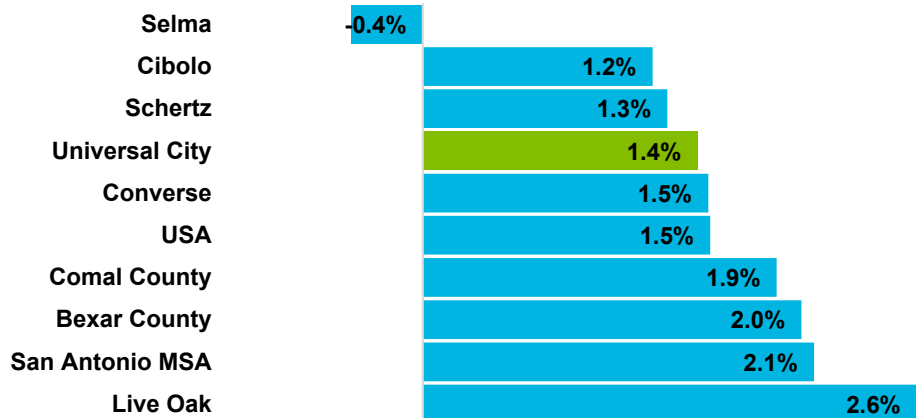
Population Born Outside of Texas

35% of all Universal City residents were born outside of Texas, higher than U.S. (27%) and regional averages (22%). Notably, all 5 adjacent communities also had higher than average shares of residents born out-of-state, even though the San Antonio MSA had lower than average shares of these residents. This trend likely reflects the impact of Randolph AFB. Significantly, for Universal City, trends since 2010 would suggest that new residents were more likely to have been born in Texas; also true in Live Oak and Converse. This shift may speak to broader changes that have unfolded with advancement of Joint Base San Antonio.

2017 Household Income



Median Household Income CAGR (2010-2017)

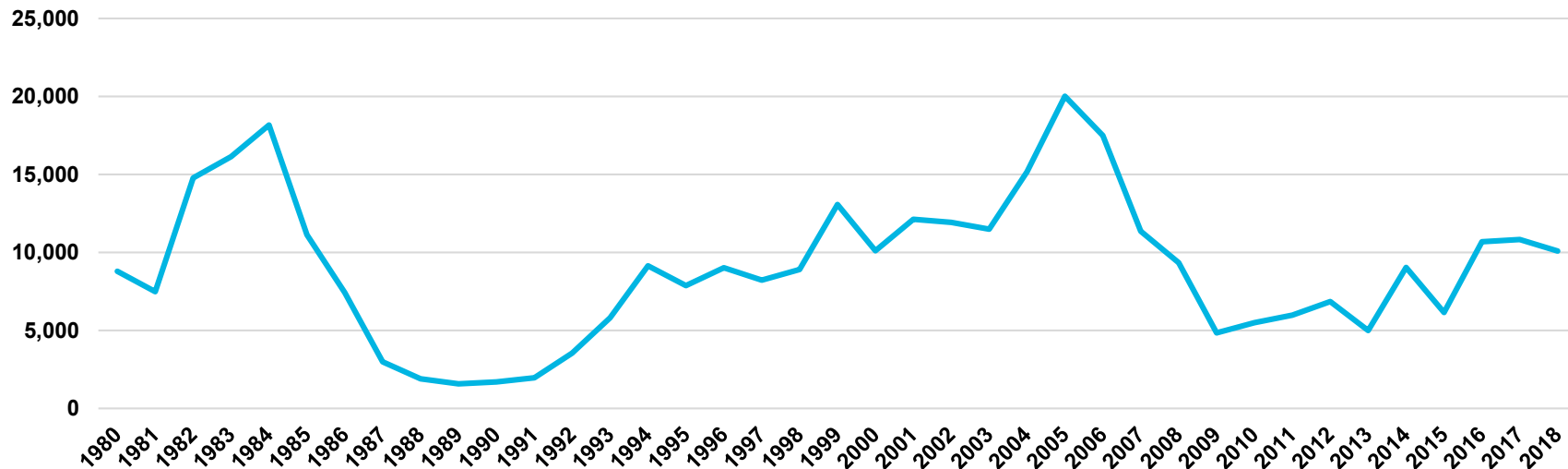


Population by Place of Birth						
Area	2010			2017		
	Same State	Different State	Foreign	Same State	Different State	Foreign
Universal City	51%	38%	11%	53%	35%	13%
Live Oak	55%	33%	12%	56%	30%	13%
Schertz	49%	42%	9%	46%	42%	12%
Selma	57%	29%	13%	50%	36%	14%
Converse	52%	36%	12%	54%	35%	11%
Cibolo	44%	44%	12%	42%	46%	12%
USA	59%	27%	14%	58%	27%	15%
Comal County	64%	28%	7%	61%	31%	8%
Bexar County	64%	22%	15%	64%	20%	15%
San Antonio MSA	65%	22%	13%	64%	22%	14%

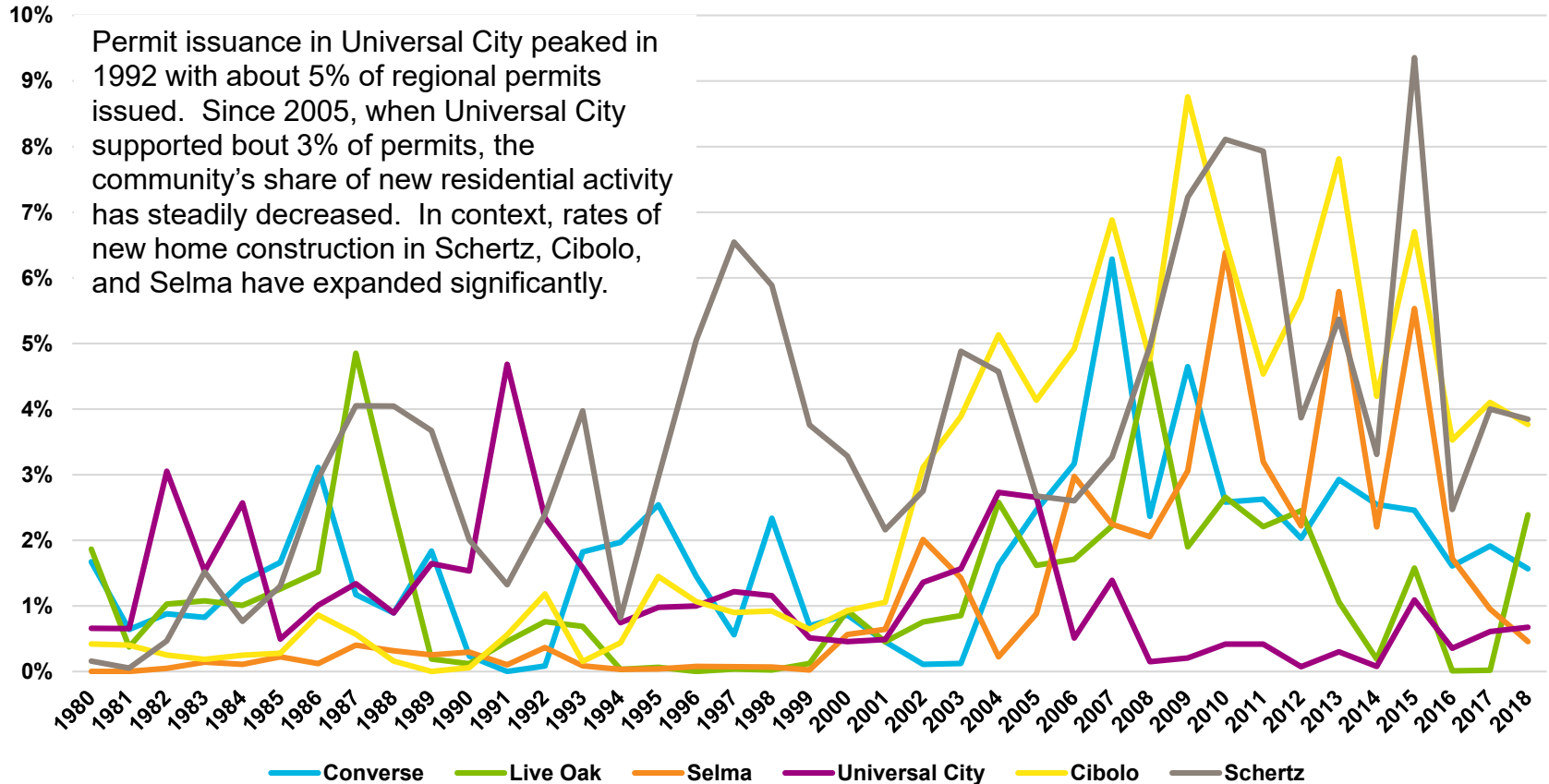
Building Permit Trends

Building permit counts were collected from HUD SOCDS to gauge historical building in Universal City, as well as its neighboring cities and local Counties (Bexar and Comal Counties). Since 1980, over 353,000 building permits have been issued in both Counties, with half of the issuance happening before 2001 and half after. Permit issuance peaked in 2005 when over 20,000 permits were issued. Since 2010, an average of 7,800 building permits have been issued yearly. The broader trend reinforces a challenge of consequential growth in population in context with a slower pace of housing construction since 2010.

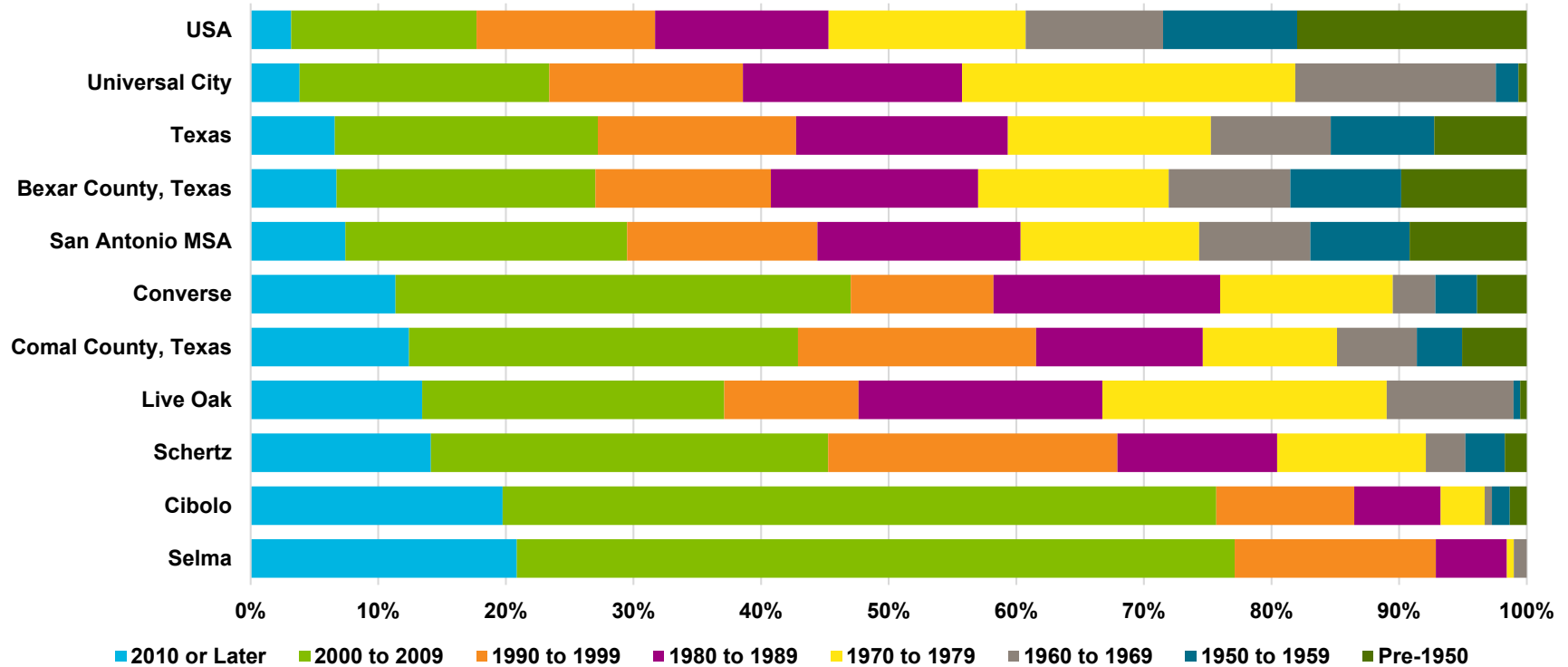
Bexar & Comal Counties: Total Building Permits



City Building Permits: Share of Bexar & Comal County Permits



Housing by Decade of Construction (% 2017)



Historic housing construction trends reinforce the unique reality of Universal City's position in the local market, with a majority of housing stock built significantly earlier, in comparison with adjacent communities. Universal City's breakdown of construction by decade largely mirrors US trends.

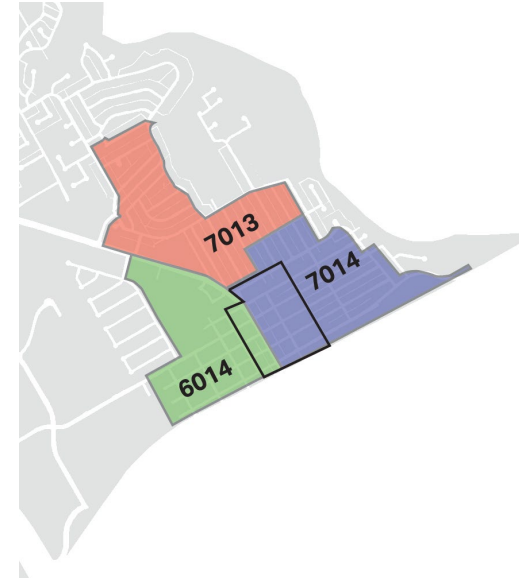
Aviation District Trends



Demographic trends for block groups within the Aviation District are distinct in comparison with city-wide trends. For example, block group 6014 added population at an annual rate of 5.9% and block group 7014 added people at a rate of 2.0%, both faster than Universal City in total (1.1% annual increase). Population decreased in block group 7013 at an annual rate of 1.2%. In aggregate, the 3 target block groups represented 15.5% of Universal City population in 2017, a slight increase from 2010.

Population					
Area	2010	2017	Share 2010	Share 2017	CAGR 10-17
Universal City	17,614	19,592	100.0%	100.0%	1.5%
6014	817	1,224	4.6%	6.2%	5.9%
7013	778	716	4.4%	3.7%	-1.2%
7014	948	1,088	5.4%	5.6%	2.0%

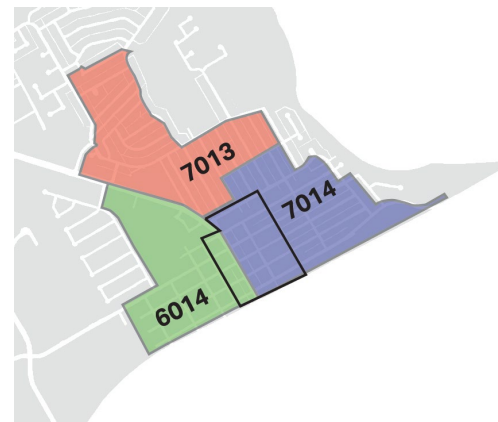
Housing Units					
Area	2010	2017	Share 2010	Share 2017	CAGR 10-17
Universal City	8,036	8,299	100.0%	100.0%	0.5%
6014	444	495	5.5%	6.0%	1.6%
7013	330	281	4.1%	3.4%	-2.3%
7014	493	525	6.1%	6.3%	0.9%



According to US Census American Community Survey, the 3 study block groups were younger on average than Universal City. As well, while median apartment rents were generally consistent city wide averages, median home values were lower. Incomes in the target block groups were lower than City values on average. Distinctions between apartment rents and home values are significant, and speak to a broader challenge of generally older apartment stock across Universal City being priced at a discount to the local market.

Study Area Summary Stats (2017)				
Area	Median Age	Median Rent	Median Home Value	Median Household Income
Universal City	36.1	\$927	\$156,000	\$60,706
6014	31.4	\$819	\$82,900	\$31,536
7013	34.9	\$963	\$90,300	\$43,977
7014	28.0	\$1,013	\$97,400	\$24,508
USA	37.8	\$982	\$193,500	\$57,652
Bexar County	33.3	\$942	\$142,300	\$53,999
TX	34.3	\$952	\$151,500	\$57,051

Source: U.S. Census Bureau



Residential and Commercial Real Estate Trends

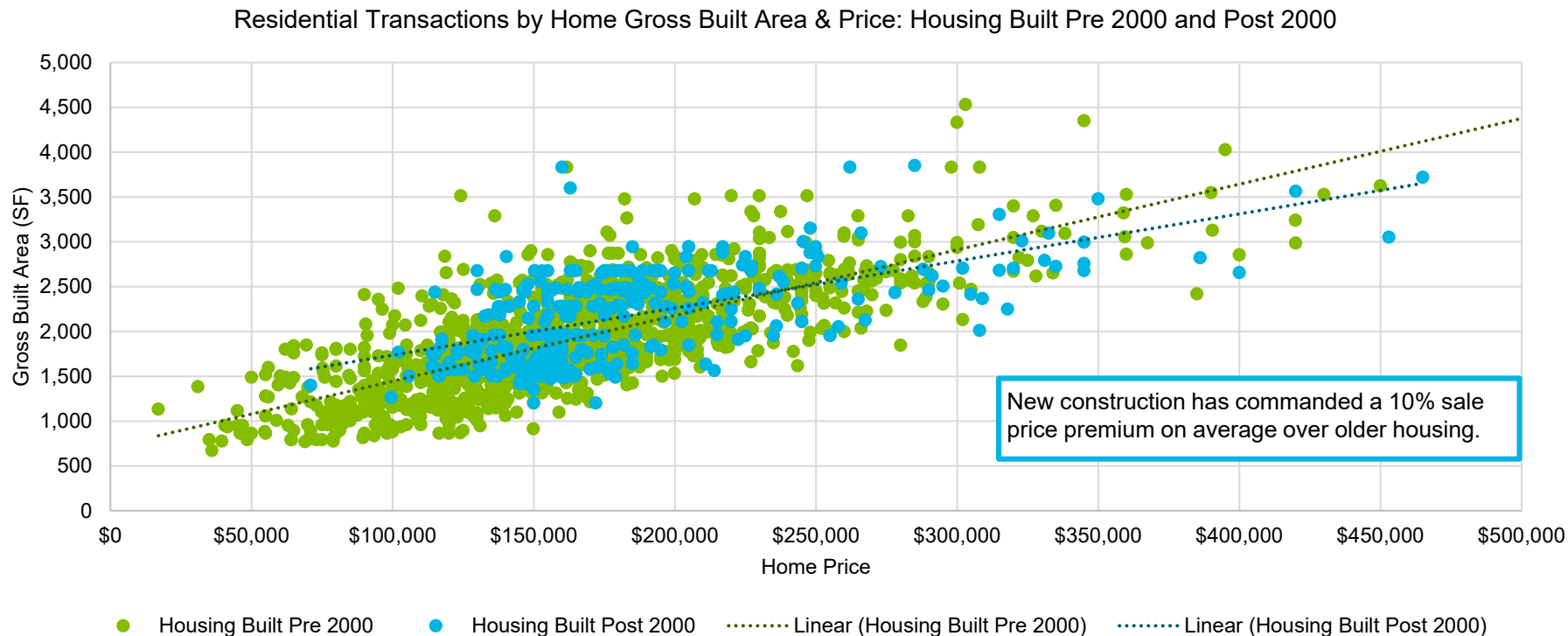


Data from the Bexar County Assessor's Office and City of Universal City Zoning department were collected at the parcel level. A benchmarking analysis was also conducted to compare residential projects in Universal City with those located in other parts of the MSA. As of 2019, Universal City had approximately 5,150 single-residential parcels, which had an average parcel size of 0.25 acres and an average lot coverage of 18%. The median year of construction for housing units in Universal City was 1978 as of 2019.

Universal City Residential Property Summary (2019)	
Metric	Value
Number of Parcels	5,143
Avg. Parcel Size (Acres)	0.25
Average Lot Coverage	18%
Average Building Size (SF)	1,962
Median Year Built	1978

Residential Transaction Summary: Universal City											
Metric	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	CAGR 10-18
Count	163	133	151	226	214	241	260	213	231	24	4.5%
Average Price	\$146,267	\$140,251	\$145,174	\$150,138	\$165,339	\$166,870	\$175,304	\$184,502	\$196,724	\$175,633	3.8%
Median Price	\$137,500	\$135,800	\$135,900	\$140,500	\$160,000	\$160,000	\$165,000	\$175,000	\$185,000	\$163,500	3.8%
Average Price per SF	\$72.65	\$70.69	\$71.97	\$75.32	\$79.90	\$85.54	\$90.99	\$94.12	\$100.12	\$105.46	4.1%
Median Price per SF	\$71.37	\$71.16	\$71.81	\$75.59	\$80.09	\$85.28	\$92.34	\$94.40	\$100.95	\$107.07	4.4%

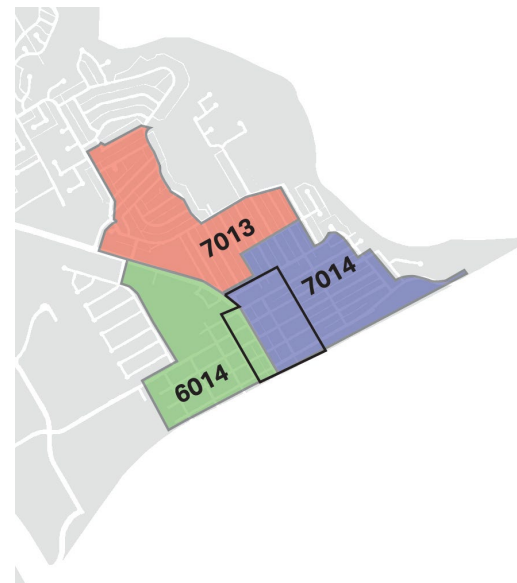
The following plot summarizes pricing trends for homes either built before 2000 or after 2000. The plot depicts a clear relationship of home size and price. For all homes priced below \$250,000, newer homes (built after 2000), are typically larger by 200 square feet and have a higher price floor (i.e. the least expensive home built after 2000 costed \$54,000 more than the least expensive home built before 2000). For homes priced at over \$250,000, the relationship between year built and home price / size tends to weaken, with the distribution spread out more evenly between older and newer housing.



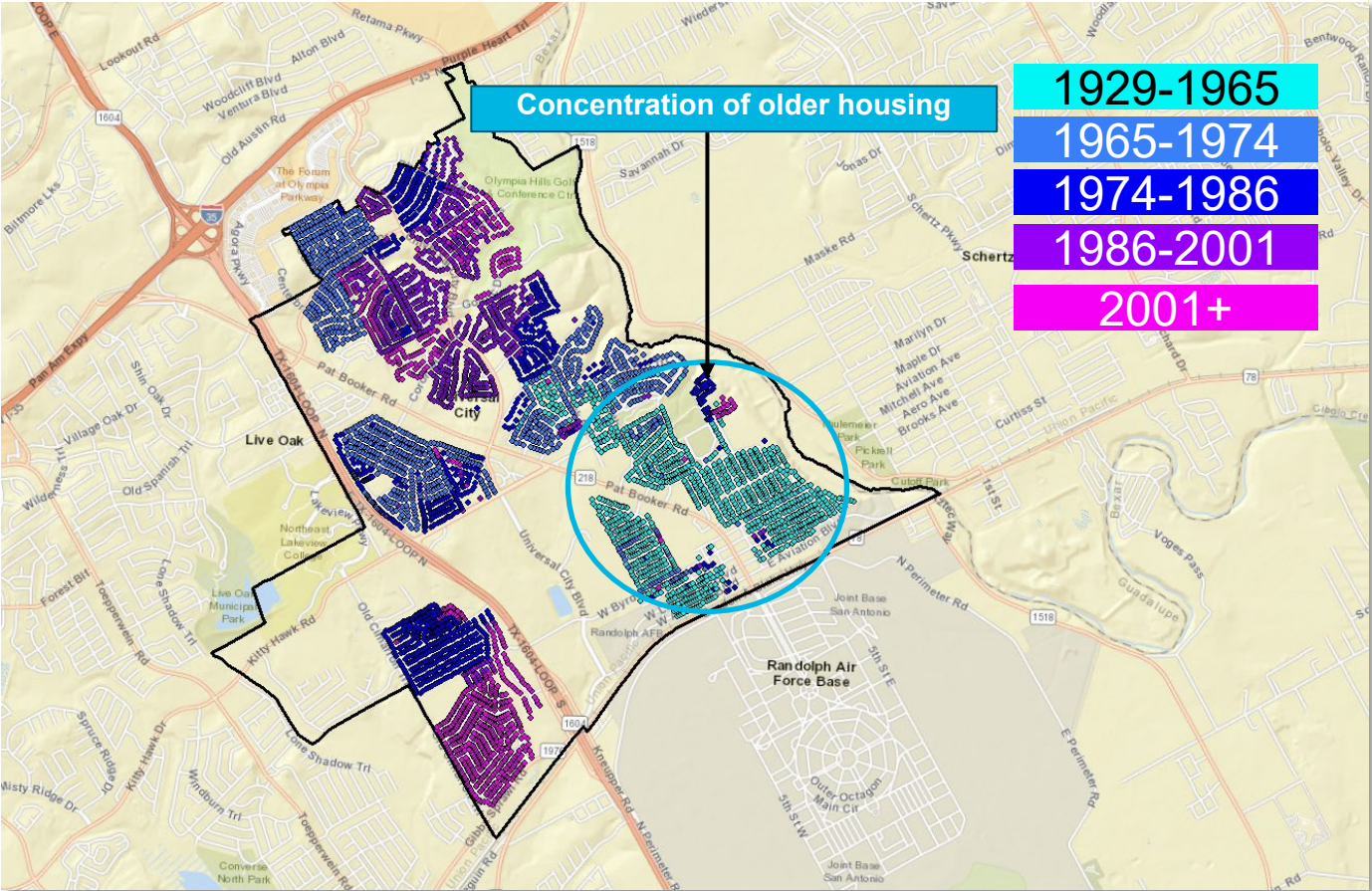
As of 2019, the 3 block groups located near Randolph AFB contained smaller residential parcels than in the other parts of Universal City (approximately 20% less acreage on average), and home sizes ranged from 500 to 700 square feet smaller on average. The age of housing in the 3 study block groups is also older than in other parts of the city. The target block groups were mostly built in 1960 or earlier, whereas the median age of housing in the rest of Universal City was 1983.

A map on the next page shows housing by year of construction.

Residential Parcel Stats (2019)					
Area	Number of Parcels	Avg. Parcel Size (acres)	Average Lot Coverage	Average Building Size (SF)	Median Year Built
Rest of City	4,327	0.26	21.0%	2,104	1983
6014	203	0.21	16.4%	1,439	1961
7013	331	0.22	15.0%	1,411	1960
7014	282	0.21	17.4%	1,594	1960



Housing by Decade of Construction



For 2019, while median home prices in the Aviation District were priced at a 40-80% discount compared to Universal City median home values, home prices were closer to City average on a per square foot basis. Between 2010 and 2018, home prices in the 3 target block groups increased over twice as fast as in the rest of Universal City, ranging from 5.6% annual growth in price in block group 6014 to 6.9% in 7014.

Transaction Count (Single Family Residential)											
Area	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019*	CAGR 10-19
Rest of City	148	116	136	194	195	205	218	183	202	17	-21.4%
6014	3	2	5	5	2	5	7	5	5	2	-4.4%
7013	4	11	5	13	5	12	18	12	15	2	-7.4%
7014	8	4	5	14	12	19	17	13	9	3	-10.3%

Median Price (Single Family Residential with Transactions)											
Area	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	CAGR 10-19
Rest of City	\$139,500	\$143,475	\$144,025	\$148,500	\$163,500	\$167,900	\$173,500	\$181,000	\$194,950	\$170,000	2.2%
6014	\$48,500	\$77,240	\$61,000	\$70,000	\$43,500	\$82,650	\$93,000	\$70,000	\$138,000	\$79,000	5.6%
7013	\$79,450	\$78,000	\$80,000	\$108,500	\$101,000	\$108,403	\$107,300	\$133,500	\$140,900	\$141,000	6.6%
7014	\$84,750	\$94,946	\$80,000	\$75,250	\$102,000	\$119,900	\$133,000	\$122,000	\$147,500	\$155,000	6.9%

Median Price per SF (Single Family Residential Transactions)											
Area	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	CAGR 10-19
Rest of City	\$72.30	\$72.76	\$75.06	\$77.15	\$80.22	\$87.86	\$93.06	\$94.65	\$101.47	\$108.70	4.6%
6014	\$61.24	\$60.80	\$66.89	\$45.28	\$51.69	\$42.61	\$81.06	\$50.87	\$89.61	\$99.43	5.5%
7013	\$69.73	\$62.03	\$66.71	\$71.67	\$86.90	\$81.90	\$77.68	\$109.71	\$96.70	\$101.64	4.3%
7014	\$56.05	\$56.33	\$50.74	\$58.13	\$72.71	\$82.36	\$92.79	\$83.48	\$102.97	\$94.77	6.0%

Transaction Metrics (Single Family Residential with known SF)					
Time Period	Metric	Rest of City	6014	7013	7014
2010-2015	Count	994	22	50	62
2016-2019		620	19	47	42
All Years		1,614	41	97	104
2010-2015	Mean Price	\$162,656	\$67,072	\$93,964	\$98,259
2016-2019		\$195,214	\$94,705	\$129,200	\$134,086
All Years		\$175,163	\$79,878	\$111,037	\$112,727
2010-2015	Median Price	\$154,500	\$67,500	\$93,250	\$97,750
2016-2019		\$182,250	\$79,000	\$121,000	\$133,000
All Years		\$165,000	\$73,000	\$109,000	\$115,500
2010-2015	Min Price	\$27,000	\$10,900	\$40,605	\$50,000
2016-2019		\$31,000	\$36,000	\$65,000	\$45,000
All Years		\$27,000	\$10,900	\$40,605	\$45,000
2010-2015	Max Price	\$465,000	\$163,000	\$155,000	\$170,000
2016-2019		\$925,000	\$181,000	\$190,000	\$208,500
All Years		\$925,000	\$181,000	\$190,000	\$208,500
2010-2015	Range Price	\$438,000	\$152,100	\$114,395	\$120,000
2016-2019		\$894,000	\$145,000	\$125,000	\$163,500
All Years		\$898,000	\$170,100	\$149,395	\$163,500

Transaction per SF Metrics (Single Family Residential with Known SF)					
Time Period	Metric	Rest of City	6014	7013	7014
2010-2015	Count	994	22	50	62
2016-2019		620	19	47	42
All Years		1,614	41	97	104
2010-2015	Mean Price	\$78.61	\$56.1	\$69.9	\$64.2
2016-2019		\$96.19	\$83.6	\$93.2	\$89.4
All Years		\$85.36	\$68.8	\$81.2	\$74.4
2010-2015	Median Price	\$77.46	\$53.3	\$71.8	\$62.3
2016-2019		\$96.33	\$81.1	\$94.0	\$88.2
All Years		\$83.87	\$75.0	\$78.4	\$74.5
2010-2015	Min Price	\$24.46	\$9.6	\$23.4	\$34.4
2016-2019		\$22.40	\$47.4	\$43.7	\$40.3
All Years		\$22.40	\$9.6	\$23.4	\$34.4
2010-2015	Max Price	\$142.69	\$92.2	\$104.4	\$116.1
2016-2019		\$164.09	\$143.2	\$139.8	\$132.7
All Years		\$164.09	\$143.2	\$139.8	\$132.7
2010-2015	Range Price	\$118.24	\$82.6	\$81.0	\$81.7
2016-2019		\$141.70	\$95.8	\$96.1	\$92.4
All Years		\$141.70	\$133.6	\$116.4	\$98.2

Source: Bexar County Appraisal District

*Note that data for 2019 does not include the full year

Property transactions for parcels in Universal City were analyzed based on the number of times they sold since 2010. Parcels that sold one time were placed in the “Single” group, while parcels that sold more than 1 time were placed in the “Multiple” group. An analysis of price by group finds that in the 3 focus block groups, 2018 average prices were between \$28,400 and \$53,400 higher for parcels that sold multiple times than parcels that sold only once. In contrast, average price in 2010 was not materially different across all 3 block groups (the parcels that would sell multiple times were worth more in block groups 6014 and 7014, but less in 7013). The analysis found that 72% of parcels that sold multiple times experienced a minor cosmetic renovation between 2010 and 2018.

Avg. Residential Prices: Parcel Sold Once				Avg. Residential Prices: Parcel Sold Multiple Times				Avg. Residential Prices: All Parcels in Subset			
Year	6014	7013	7014	Year	6014	7013	7014	Year	6014	7013	7014
2010	\$48,500	\$83,167	\$85,850	2010	\$54,025	\$40,605	\$102,750	2010	\$52,183	\$72,526	\$90,075
2011	\$77,240	\$76,116	\$82,265	2011	N/A	\$88,337	\$97,431	2011	\$77,240	\$79,449	\$89,848
2012	\$52,333	\$78,200	\$87,593	2012	\$48,750	N/A	\$80,000	2012	\$50,900	\$78,200	\$86,074
2013	\$116,000	\$109,484	\$85,599	2013	\$24,450	\$88,450	\$82,758	2013	\$79,380	\$103,012	\$84,178
2014	N/A	\$96,600	\$108,071	2014	\$43,500	\$109,900	\$95,800	2014	\$43,500	\$99,260	\$102,958
2015	\$100,575	\$106,426	\$104,069	2015	\$75,000	\$137,000	\$119,933	2015	\$85,230	\$108,974	\$114,088
2016	\$95,900	\$114,455	\$135,644	2016	\$103,000	\$112,054	\$129,380	2016	\$96,914	\$113,521	\$133,802
2017	\$61,500	\$140,504	\$120,167	2017	\$110,000	\$130,125	\$118,928	2017	\$80,900	\$137,045	\$119,500
2018	\$69,000	\$128,789	\$132,917	2018	\$122,375	\$157,233	\$184,333	2018	\$111,700	\$140,166	\$150,056

Source: Bexar County Appraisal District

*Note that data for 2019 does not include the full year

Office Real Estate Summary (2019)							
City	Cap Rate	Sale Price / SF or Unit	Average Sale Price	Sales Volume	Sale Vs. Asking Price	Average SF	Months to Sale
Universal City	0.0%	\$52	\$464,000	\$1,400,000	-10.6%	4,800	5.8
Live Oak	0.0%	\$0	\$0	\$0	0.0%	9,000	8.7
Schertz	5.9%	\$237	\$1,900,000	\$17,000,000	-21.8%	5,700	8.1
Selma	0.0%	\$0	\$0	\$0	0.0%	0	0.0
Converse	0.0%	\$36	\$650,000	\$650,000	0.0%	6,500	0.5
Cibolo	0.0%	\$164	\$315,000	\$315,000	-4.3%	9,700	5.3

Industrial Real Estate Summary (2019)							
City	Cap Rate	Sale Price / SF or Unit	Average Sale Price	Sales Volume	Sale Vs. Asking Price	Average SF	Months to Sale
Universal City	0.0%	\$100	\$971,000	\$4,900,000	-20.6%	14,300	7.6
Live Oak	0.0%	\$0	\$0	\$0	0.0%	0	0.0
Schertz	6.5%	\$87	\$8,100,000	\$322,000,000	-7.9%	58,700	10.9
Selma	7.7%	\$124	\$3,800,000	\$22,900,000	-8.1%	20,500	10.5
Converse	8.3%	\$44	\$661,000	\$7,300,000	0.0%	8,900	13.9
Cibolo	0.0%	\$59	\$563,000	\$2,300,000	-2.1%	20,300	10.8

Following tables summarize commercial property transactions from CoStar for Universal City and neighboring communities for office, retail, industrial, and multi-family . The data suggests that office buildings in Universal City are smaller on average than office buildings in all other neighboring cities (4,800 SF in Universal City compared to Schertz which had an average size of 5,700 SF). Despite this, the average retail building price in Universal City (\$645,000) was less than half the average price in Converse (\$1,300,000).

Retail Real Estate Summary (2019)							
City	Cap Rate	Sale Price / SF or Unit	Average Sale Price	Sales Volume	Sale Vs. Asking Price	Average SF	Months to Sale
Universal City	7.6%	\$128	\$645,000	\$11,600,000	-9.2%	7,300	9.9
Live Oak	7.5%	\$143	\$4,000,000	\$39,600,000	-7.2%	21,300	8.8
Schertz	7.9%	\$252	\$2,000,000	\$22,300,000	-13.3%	12,300	10.3
Selma	7.7%	\$390	\$2,300,000	\$4,600,000	-25.0%	13,300	6.9
Converse	7.2%	\$158	\$1,300,000	\$20,000,000	-5.9%	6,800	13.0
Cibolo	8.5%	\$105	\$607,000	\$1,200,000	-27.7%	6,400	14.4

Multi-Family Real Estate Summary (2019)							
City	Cap Rate	Sale Price / SF or Unit	Average Sale Price	Sales Volume	Sale Vs. Asking Price	Units	Months to Sale
Universal City	6.0%	\$77,635	\$13,600,000	\$150,000,000	-10.8%	113	8.1
Live Oak	0.0%	\$0	\$0	\$0	0.0%	305	0.0
Schertz	7.0%	\$115,121	\$22,400,000	\$67,300,000	-5.0%	95	24.3
Selma	0.0%	\$0	\$0	\$0	0.0%	280	0.0
Converse	5.8%	\$100,552	\$16,200,000	\$81,200,000	-1.3%	83	4.7
Cibolo	0.0%	\$0	\$0	\$0	0.0%	0	0.0

Source: CoStar

Land Real Estate Summary (2019)					
City	Cap Rate	Average Sale Price	Sales Volume	Sale Vs. Asking Price	Months to Sale
Universal City	0.0%	\$511,000	\$3,600,000	-3.9%	24.6
Live Oak	0.0%	\$1,100,000	\$10,200,000	-6.9%	22.3
Schertz	6.1%	\$847,000	\$39,000,000	-6.6%	23.0
Selma	0.0%	\$1,500,000	\$7,500,000	-12.8%	28.9
Converse	0.0%	\$949,000	\$34,100,000	-1.4%	24.8
Cibolo	0.0%	\$1,400,000	\$30,200,000	-2.7%	27.7

Source: CoStar

Residential projects in Universal City with were compared with projects the region:

- Structures in Universal City
- Structures within 5 miles of Universal City, but not included in the first study area
- Structures in the balance of the San Antonio MSA but not included in the other study areas (labeled as “Other Areas”)

Data was collected for the newest and most expensive structures in each study area for the following property types:

- Multi-family structures (apartments)
- Newly built attached residential (new construction)
- Newly built single family residential (built 2010 or later)

The analysis yielded the following insights about new housing in / near Universal City:

- The volume of new housing construction is generally lower in Universal City than in neighboring areas. For example, a search on realtor.com for homes built since 2016 returns 208 homes in total, while a search using the same criteria in Universal City returns 4.
- New townhomes / attached housing units are concentrated in areas closer to downtown San Antonio. The analysis could not find a sufficient sample of new townhomes built in Universal City or within the 5 mile study ring.
- Home prices in Universal City were generally lower on a per SF basis than in the 5 mile study ring and the rest of the San Antonio MSA.

Real Estate Benchmark Projects – Multi-Family, Universal City

501 Sunrise Canyon Dr., Universal City
Sunrise Canyon Apartments
Avg. Rent: \$1,012 per Unit
Year Built: 2005



11801 E Loop 1604 N, Universal City
Arya Grove
Avg. Rent: \$951 per Unit
Year Built: 2006



165 Palisades Dr., Universal City
Palisades Park Apartments
Avg. Rent: \$734 per Unit
Year Built: 1984



1950 Universal City Blvd., Universal City
Ironwood Apartment Homes
Avg. Rent: \$895 per Unit
Year Built: 1984



Real Estate Benchmark Projects – Single-Family Universal City

153 Rustic Spring, Universal City
Price: \$324,790
Square Footage: 3,417
Year Built: 2019



334 Anchor Bluff, Universal City
Price: \$312,500
Square Footage: 2,407
Year Built: 2017
Lot Square Footage: 10,018



514 W Byrd Blvd., Universal City
Price: \$185,900
Square Footage: 1,483
Year Built: 2019
Lot Square Footage: 6,098



405 W Wright Blvd., Universal City
Price: \$185,000
Square Footage: 1,483
Year Built: 2019
Lot Square Footage: 6,098



Real Estate Benchmark Projects – Multi-Family, 5-Mile Ring

4906 Wurzbach Pky., San Antonio
The Upton at Longhorn Quarry
Avg. Rent: \$1,324 per Unit
Year Built: 2017



5415 N Foster Rd, San Antonio
Viridian
Avg. Rent: \$1,165 per Unit
Year Built: 2018



5126 N Loop 1604 E, San Antonio
Judson Pointe
Avg. Rent: \$1,106 per Unit
Year Built: 2014



15400 Lookout Rd, San Antonio
Villas at Mira Loma Apartment Homes
Avg. Rent: \$1,165 per Unit
Year Built: 2013



Real Estate Benchmark Projects – New Single Family 5-Mile Ring

830 Swift Fox, Cibolo
Price: \$451,136
Square Footage: 1,483
Year Built: 2019
Lot Square Footage: 10,890



125 Boulder VW, Cibolo
Price: \$384,600
Square Footage: 2,770
Year Built: 2019



The Crossvine 60' Ridgegate, Schertz
Price: \$382,990
Square Footage: 2,425
Year Built: 2019



8111 Yellow Bark Blvd, Seguin
Price: \$349,000
Square Footage: 2,306
Year Built: 2019
Lot Square Footage: 11,375



Real Estate Benchmark Projects – Multi-Family, Regional

312 Pearl Pky, San Antonio
The Cellars at Pearl
Avg. Rent: \$4,364 per Unit
Year Built: 2017



230 W Sunset Rd, San Antonio
Franklin Park at Alamo Heights
Avg. Rent: \$4,056 per Unit
Year Built: 2016



5423 N Loop 1604 W, San Antonio
WaterWalk San Antonio NW at the Rim
Avg. Rent: \$2,510 per Unit
Year Built: 2018



18610 Tuscany Stone, San Antonio
Overture Stone Oak
Avg. Rent: \$2,463 per Unit
Year Built: 2017



Real Estate Benchmark Projects – Attached Residential Other Areas

San Antonio (Luma Community)
Price: \$339,000
Square Footage: 1,391
Year Built: 2019



115 Devine St 201, San Antonio
Price: \$469,000
Square Footage: 1,606
Year Built: 2019



910 E Josephine St, San Antonio
Price: \$419,000
Square Footage: 1,420
Year Built: 2018



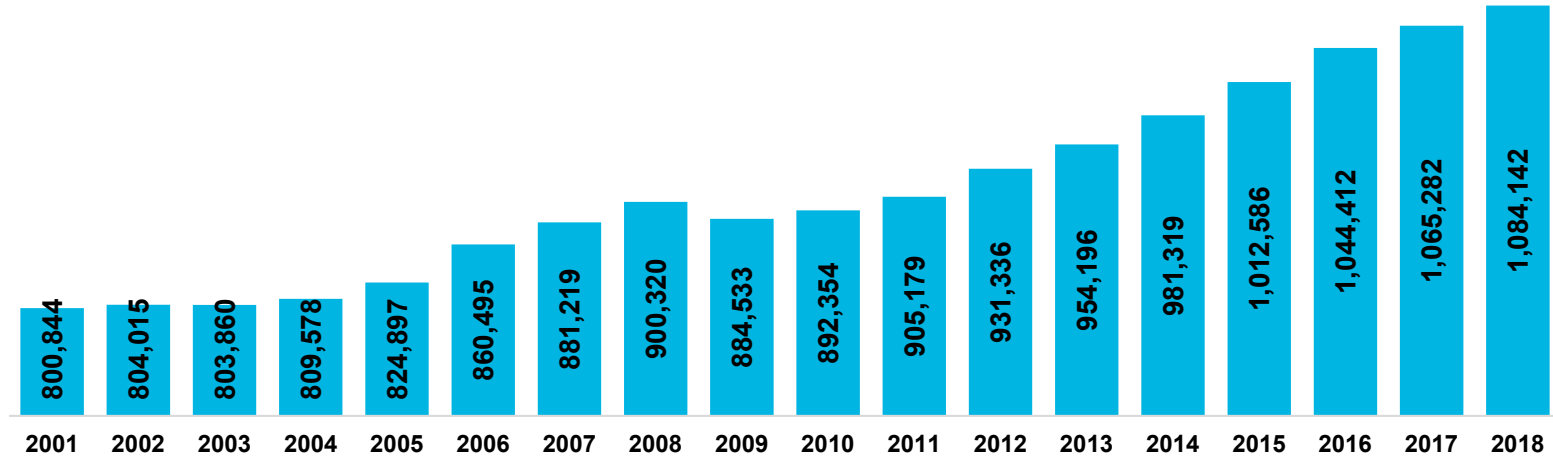
7934 Teak Ln, San Antonio
Price: \$364,990
Square Footage: 1,472
Year Built: 2019



Regional Employment Trends



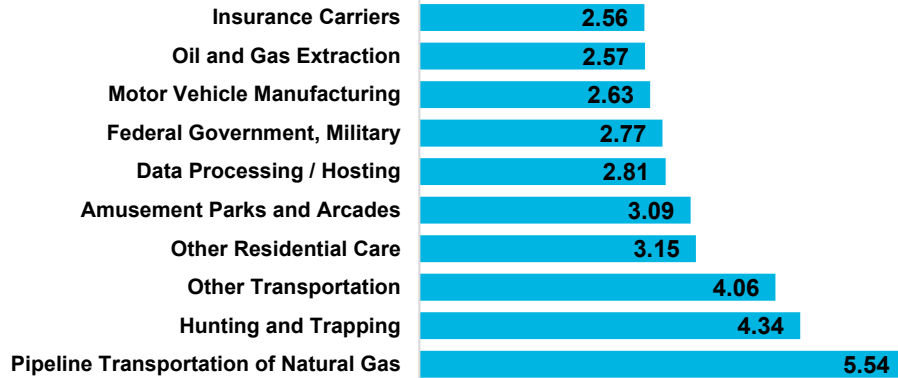
San Antonio MSA - Total Employment



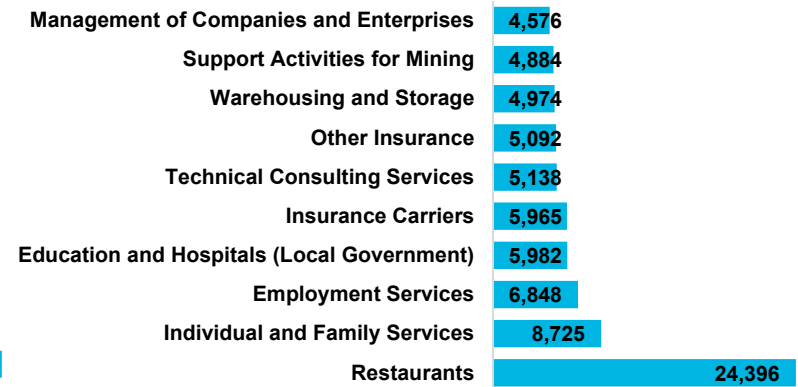
Regional employment has grown at an annual rate of 1.8% between 2001 and 2018. Post-Recession growth was slightly faster than the long-term average (2.5% annual growth between 2010 and 2018). Health care and accommodation / food service commanded the most job growth post-Recession.

Source: EMSI

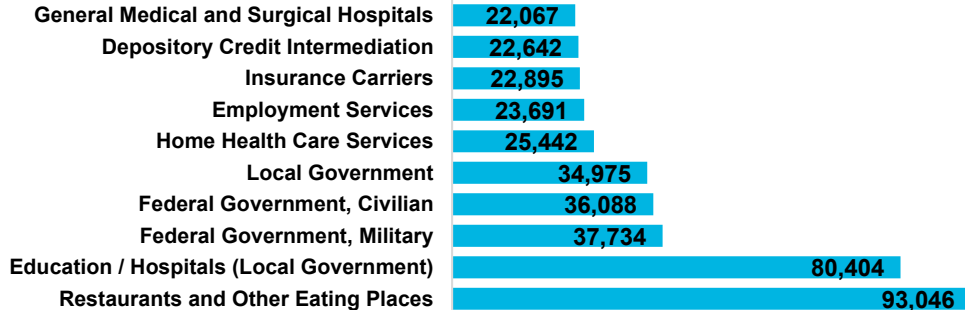
San Antonio Employment LQ 2018: Top 10 Industries



San Antonio Jobs Added 2010-2018: Top 10 Industries



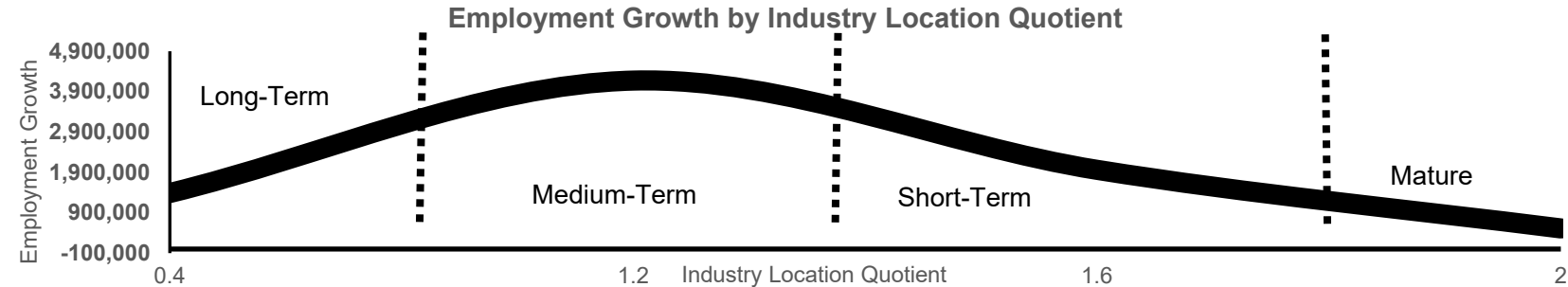
San Antonio Employment Totals 2018: Top 10 Industries

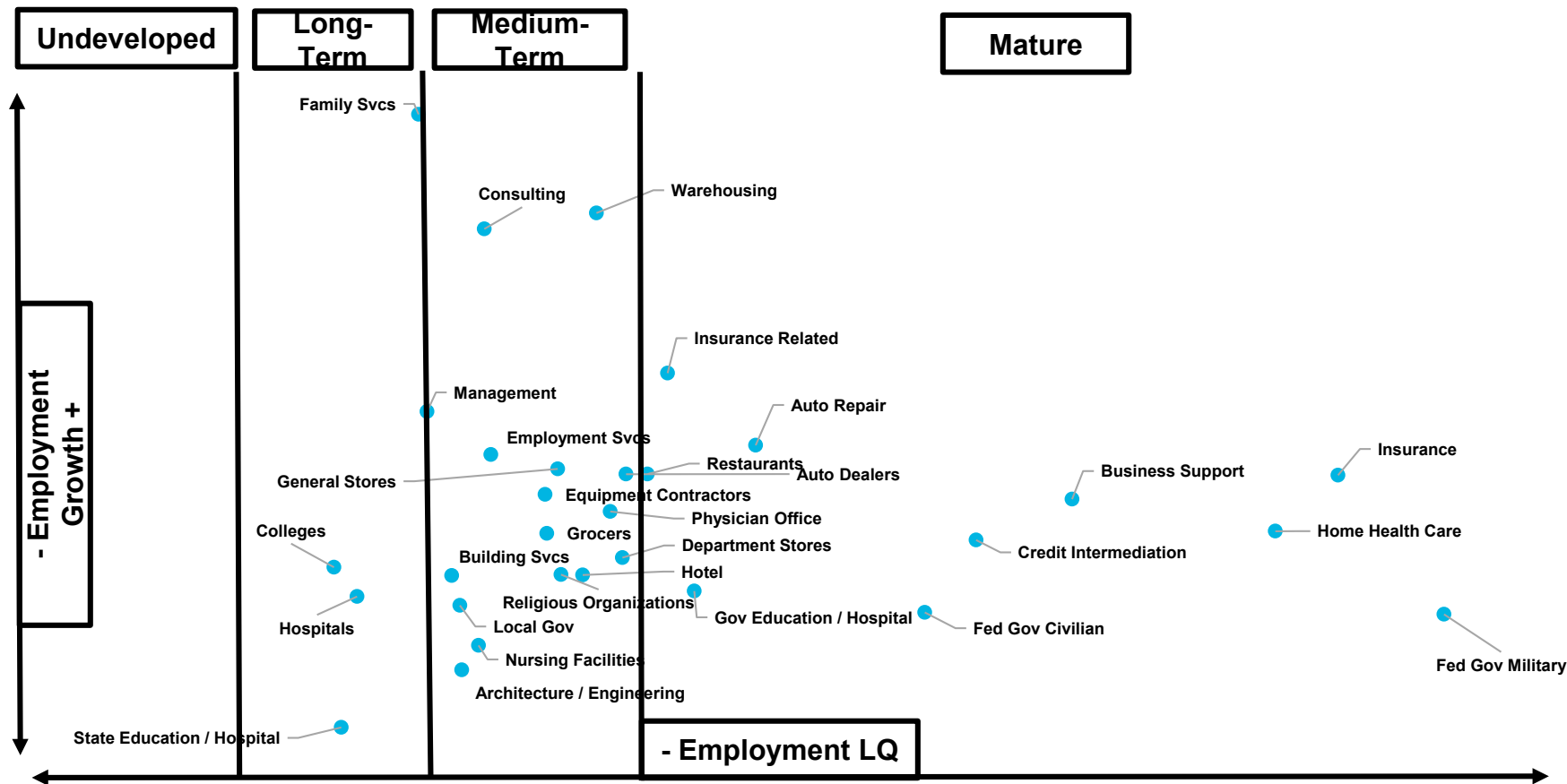


By industry, employment in oil & gas, professional services, health care, and military occupations is highly concentrated in San Antonio. Restaurants, schools, and hospitals employed more than 2 times as many workers as the next largest industries in the MSA.

The graphic on the following page highlights the 30 largest regional industries plotted based on their employment growth rate and their employment location quotient in 2018. Industries are grouped into development phases based on their current location quotient. Development phases are based on an analysis of employment growth in the 30 largest MSAs in the U.S. between 2010 and 2018. Development phases are described in the table below

Industry Timing	Description
Long-Term	Low LQ industries. Job growth typically increases at an increasing rate. Small starting point means actual job growth tends to be small for several years.
Medium-Term	LQs close to U.S. averages. Many of these industries add jobs at healthy rates. Their starting size means jobs can consistently increase over time.
Short-Term	High LQ industries. Job growth is typical, but growth rates tend to decrease over time. Due to large starting size many jobs can be added, but as concentration increases growth rates tend to decrease over long periods of time.
Mature (Short-Term)	At least 50% more concentrated than U.S. average. These industries typically experience volatile or low rates of growth over long periods of time.





Employment data for Universal City was retrieved by business location from ESRI Business Analyst. Data was grouped by 4 digit NAICS Code for analysis. Restaurants and elementary / secondary schools are the largest employers in Universal City, with over 1,200 jobs represented. Both are also more concentrated than U.S. average, with employment location quotients above 1.9. In Universal City, there are notable concentrations of independent artists (LQ 14.0) and auto repair (4.3), which collectively employ 260 people and are not as concentrated in nearby towns.

Top 15 Industries by Employment (2017)							
NAICS Industry	Universal City		Selma	Schertz	Converse	Live Oak	Cibolo
	Employment	LQ	LQ	LQ	LQ	LQ	LQ
7225 Restaurants and other eating places	686	1.93	2.77	1.42	1.39	1.89	0.71
6111 Elementary and secondary schools	667	2.17	0.06	0.94	2.51	1.03	4.13
4521 Electronic Wholesalers	360	3.80	3.40	1.59	3.74	1.29	4.47
8111 Automotive repair and maintenance	204	4.38	0.95	2.30	2.25	0.84	0.56
4451 Grocery stores	159	1.38	0.12	1.08	0.76	0.11	0.07
8121 Personal care services	149	2.75	0.91	1.29	1.03	1.26	0.89
4441 Building material and supplies dealers	124	1.98	2.57	1.93	0.15	0.37	4.06
8131 Religious organizations	122	2.07	1.08	0.78	0.54	0.37	1.09
5312 Offices of real estate agents and brokers	117	1.48	0.20	1.29	0.65	0.65	0.66
5311 Lessors of real estate	98	2.86	0.71	0.55	1.92	0.71	0.41
2361 Residential building construction	89	1.57	4.19	4.03	1.63	0.19	3.26
2123 Nonmetallic mineral mining	85	19.90	0.00	0.88	0.00	0.00	0.00
6244 Child day care services	73	1.97	0.27	1.69	1.91	2.87	0.60
7139 Other amusement	73	1.36	0.21	0.34	0.11	1.03	0.53
6212 Offices of dentists	63	2.32	0.47	2.20	0.77	2.56	2.15

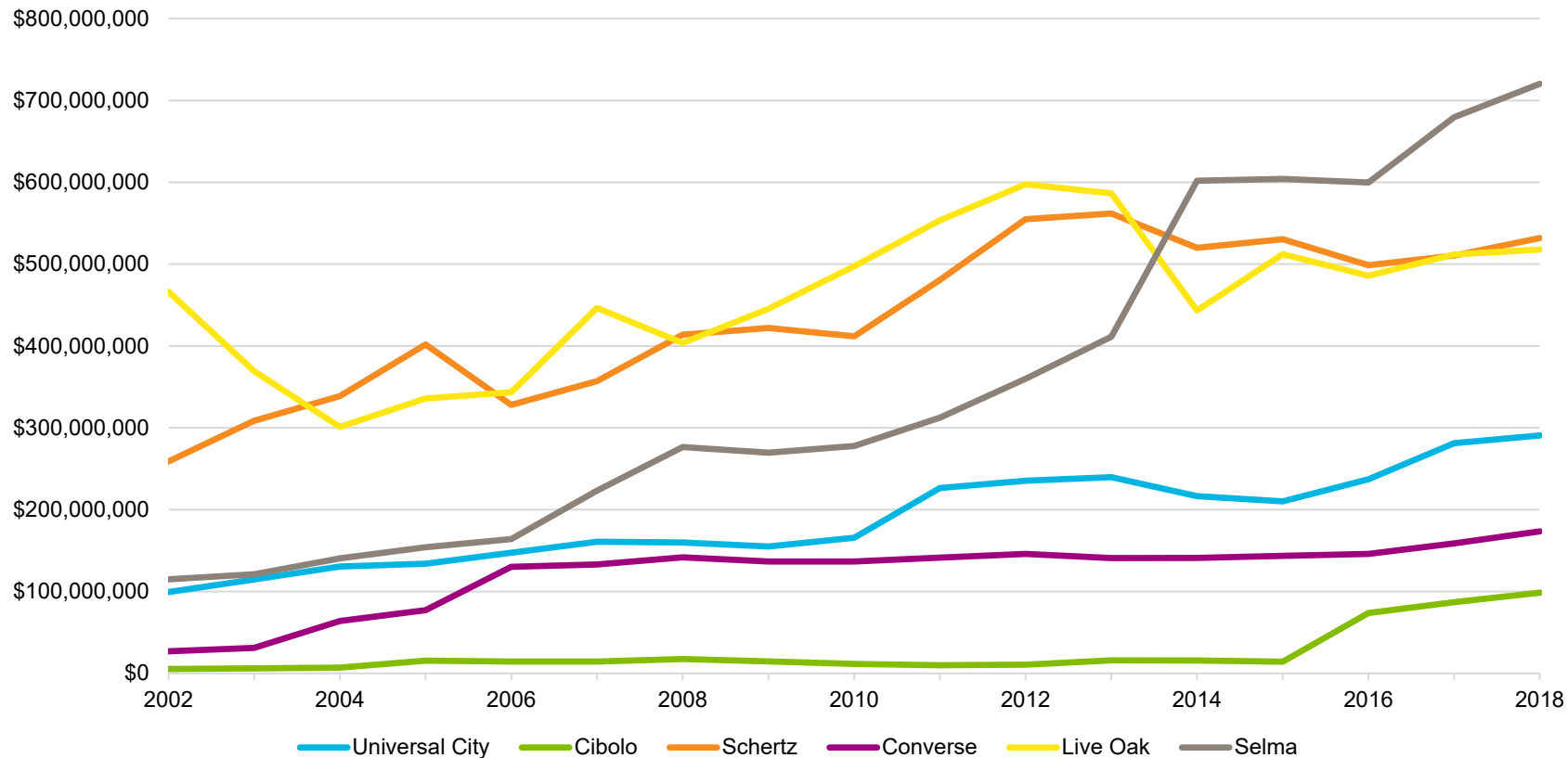
Top 15 Industries by Employment Location Quotient (2017)								
NAICS Industry		Universal City		Selma	Schertz	Converse	Live Oak	Cibolo
		Employment	LQ	LQ	LQ	LQ	LQ	LQ
2123	Nonmetallic mineral mining	85	19.90	0.00	0.88	0.00	0.00	0.00
7115	Independent artists, writers, & performers	60	14.01	0.00	0.00	1.36	0.00	0.00
5622	Waste treatment and disposal	28	9.95	0.00	0.94	0.00	4.34	2.15
8111	Automotive repair and maintenance	204	4.38	0.95	2.30	2.25	0.84	0.56
5323	General rental centers	12	4.32	0.00	0.00	4.50	0.00	4.35
8123	Dry cleaning and laundry services	46	3.89	0.00	0.48	0.14	0.31	0.00
8113	Commercial machinery repair / maintenance	19	3.87	0.00	0.15	2.38	0.00	8.20
4521	Electronic Wholesalers	360	3.80	3.40	1.59	3.74	1.29	4.47
7224	Drinking places, alcoholic beverages	42	3.52	0.18	0.60	0.70	4.61	0.17
7131	Amusement parks and arcades	30	3.44	0.00	0.00	0.00	2.52	0.00
5311	Lessors of real estate	98	2.86	0.71	0.55	1.92	0.71	0.41
8121	Personal care services	149	2.75	0.91	1.29	1.03	1.26	0.89
4881	Support activities for air transportation	33	2.67	0.00	0.00	0.00	0.00	0.00
5222	Non-depository credit intermediation	54	2.60	0.17	0.29	0.24	1.00	0.00
4236	Appliance / electric goods merchant whls.	62	2.43	0.25	0.37	0.36	1.20	0.00

Source: ESRI Business Analyst

Retail Sales Trends



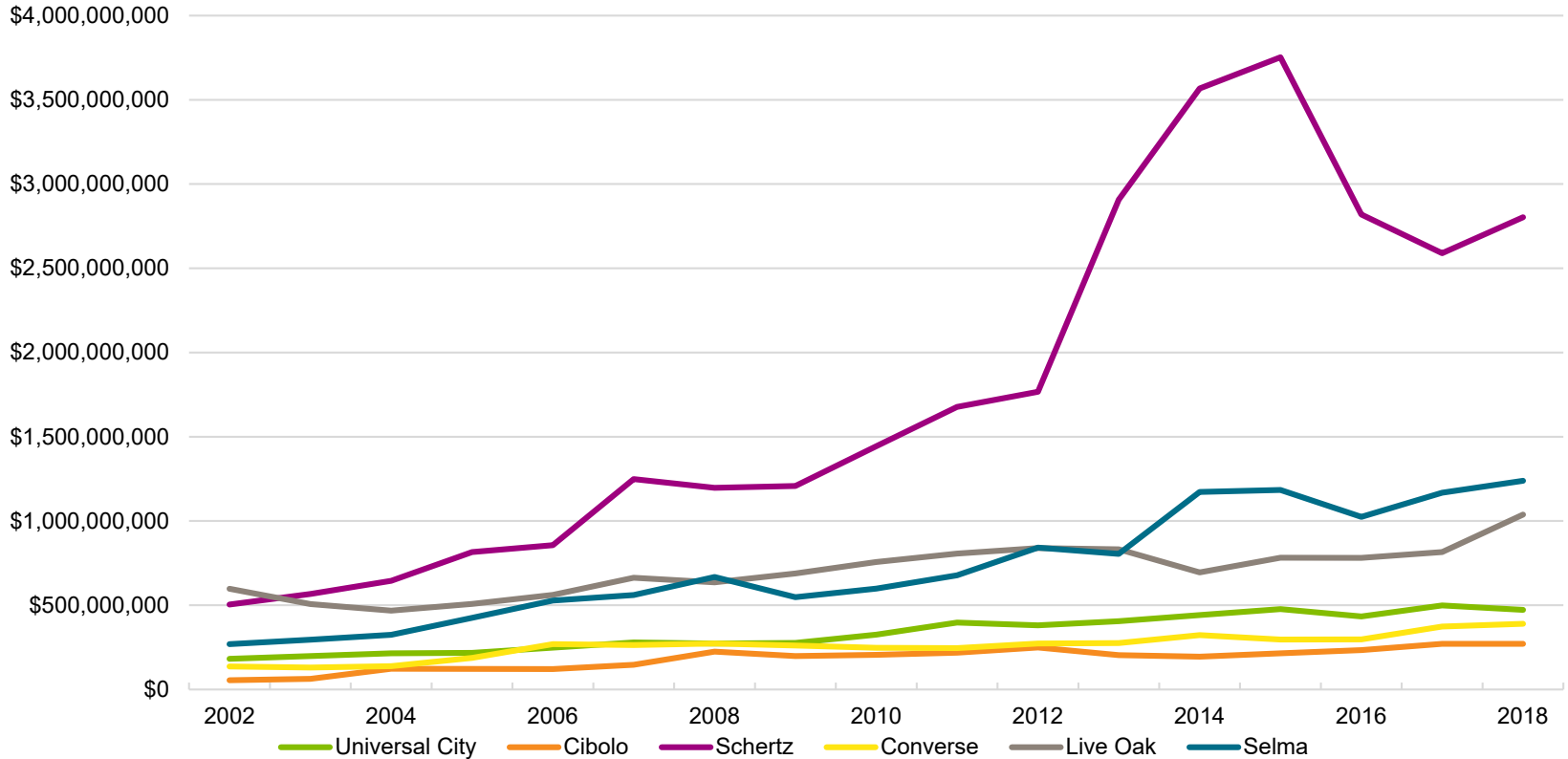
Annual Gross Retail Sales



Source: TX Comptroller's Office, CoStar

* All industries includes all sectors listed in the Comptroller table (Appendix), Retail Sales includes only retail NAICS Code sales

Annual Gross Sales, All Industries



Source: TX Comptroller's Office, CoStar

* All industries includes all sectors listed in the Comptroller table (Appendix), Retail Sales includes only retail NAICS Code sales

Gross Retail Sales by City										
City	2010	2011	2012	2013	2014	2015	2016	2017	2018	CAGR 10-18
Universal City	\$165,759,059	\$226,469,849	\$235,379,479	\$239,783,926	\$216,424,341	\$210,103,788	\$237,230,911	\$281,250,471	\$290,728,671	7.3%
Cibolo	\$11,607,145	\$9,834,244	\$10,575,459	\$15,851,176	\$15,785,246	\$14,294,714	\$73,759,871	\$86,949,263	\$98,618,799	30.7%
Schertz	\$411,761,725	\$480,813,740	\$554,927,864	\$561,913,782	\$519,873,372	\$530,387,554	\$498,723,029	\$510,507,141	\$531,883,020	3.3%
Converse	\$136,625,229	\$141,309,114	\$146,002,103	\$140,937,310	\$141,115,443	\$143,636,051	\$145,997,187	\$158,816,685	\$173,548,828	3.0%
Live Oak	\$497,463,675	\$553,419,718	\$597,480,089	\$586,425,870	\$443,332,668	\$512,147,257	\$485,841,310	\$511,761,035	\$517,972,441	0.5%
Selma	\$277,706,538	\$312,369,624	\$359,986,695	\$411,322,115	\$601,936,557	\$604,072,207	\$599,677,498	\$679,503,735	\$720,266,305	12.7%

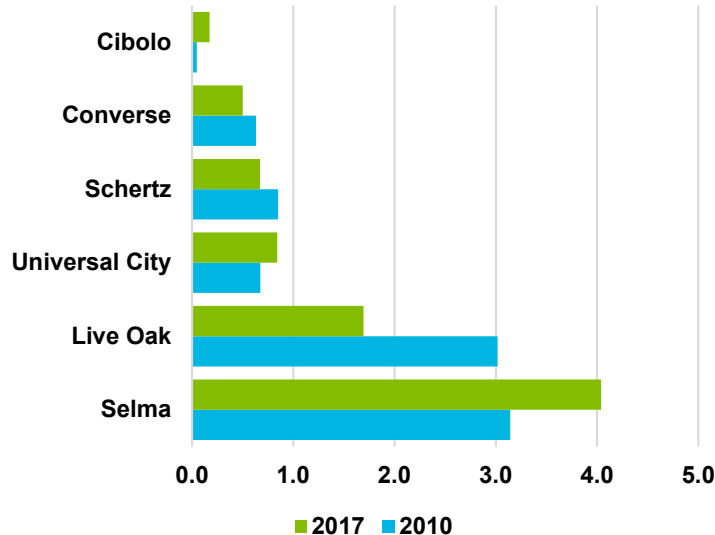
Gross Retail Sales per SF of Retail by City										
City	2010	2011	2012	2013	2014	2015	2016	2017	2018	CAGR10-18
Universal City	\$132	\$180	\$186	\$182	\$157	\$154	\$159	\$184	\$194	4.9%
Cibolo	\$86	\$75	\$79	\$112	\$110	\$99	\$183	\$198	\$225	12.7%
Schertz	\$201	\$231	\$268	\$262	\$270	\$274	\$219	\$233	\$248	2.7%
Converse	\$267	\$275	\$273	\$249	\$243	\$233	\$217	\$231	\$236	-1.5%
Live Oak	\$1,647	\$1,772	\$1,932	\$2,060	\$1,583	\$1,795	\$1,572	\$1,718	\$1,720	0.5%
Selma	\$243	\$278	\$315	\$358	\$503	\$481	\$472	\$532	\$570	11.3%

Source: TX Comptroller's Office, CoStar

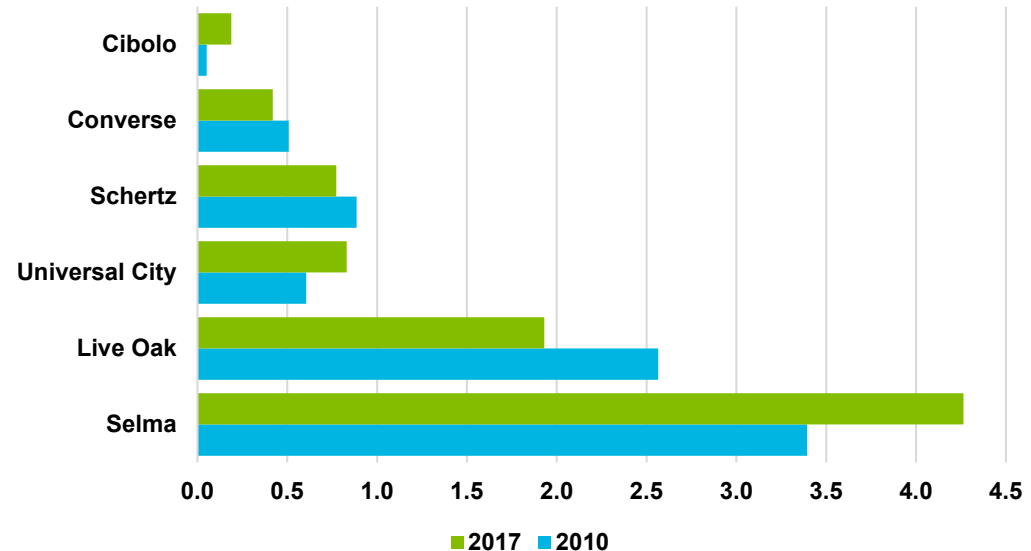
* Live Oak is the location of the local IKEA, and warrants further investigation into the building list for the community

Retail pull factors were computed for Universal City and neighboring communities. Pull factors express the amount of retail sales in a given location relative to the retail sales expected in a location based on local demographics. A pull factor greater than 1.0 indicates that local retail sales are above what the resident base should otherwise generate (i.e. sales are being pulled in from other areas). Two types of pull factors were computed for this effort, an income-adjusted pull factor and a non-income adjusted pull factor. The income-adjustment changes the expected retail sales based on per capita income of the location. Based on data from 2017, Universal City has pull factors of 0.8, both income-adjusted and non-income adjusted. While this would point to relevant leakage of retail sales to adjacent communities, likely flowing to Selma and Live Oak, the community's pull factor has improved since 2010, from roughly 0.6 to about 0.8, a positive sign

Income-Adjusted Pull Factors: 2010 & 2017



Non Income-Adjusted Pull Factors: 2010 & 2017



Retail NNN Rent Summary										
Area	2010	2011	2012	2013	2014	2015	2016	2017	2018	CAGR 10-18
Universal City	\$13.75	\$11.58	\$11.21	\$13.46	\$10.95	\$10.13	\$15.43	\$14.72	\$16.63	2.4%
Live Oak	\$19.25	\$16.75	\$17.46	\$18.60	\$17.47	\$14.87	\$20.15	\$21.55	\$22.03	1.7%
Schertz	\$20.88	\$16.40	\$16.91	\$20.28	\$20.42	\$20.55	\$20.69	\$20.83	\$22.03	0.7%
Selma	\$23.32	\$18.68	\$20.76	\$30.00	\$29.29	\$24.00	\$24.00	\$25.03	\$20.60	-1.5%
Converse	\$14.59	\$14.59	\$15.16	\$15.44	\$14.67	\$17.79	\$19.27	\$18.49	\$20.02	4.0%
Cibolo	\$0.00	\$0.00	\$22.00	\$21.59	\$20.00	\$20.46	\$20.38	\$20.50	\$23.27	N/A
Bexar County	\$14.84	\$14.03	\$14.11	\$14.78	\$14.61	\$14.55	\$14.73	\$15.07	\$15.94	0.9%
Comal County	\$13.52	\$13.64	\$13.18	\$13.01	\$15.67	\$15.12	\$18.71	\$18.70	\$20.07	5.1%



Appendix B- 03 Land Use Existing Conditions



Utilities



Legend

- UC Water Lines
- Study Area
- UC Parcel Boundaries



Legend

- UC_Sewer
- Study Area
- UC Parcel Boundaries

- The study area is in general well served by both water and wastewater. However, the lines may be undersized for higher use, and are likely old given the age of the subdivision.
- The study area is characterized by rear-loaded sewer lines that run through easements rather than in street ROW. This is typical for older developments but can create maintenance challenges because of line location.
- The city is currently updating their GIS information to account for line replacement on Aviation Blvd (in red); new data will be mapped when available.

Street Grid



1 Pat Booker Road is the main arterial through the study area, historically connecting Randolph AFB to the rest of Universal City.

2 East-west connections along Aviation Boulevard and Wright Boulevard connect the study area to Veteran's park (to the east) and residential subdivisions to the west.

3 Small block faces in the study area create the opportunity for walkability. The longest block face is along Langley Ave (514 feet) Most other block faces do not exceed 200 feet.

4 The study area has some unimproved alleys or alley fragments that provide rear entry access to existing parcels. This may allow opportunities to remove curb cuts along street frontage, providing a better walking environment.

Regional Mobility and Access



- Natural obstructions along the boundaries of Universal City limit access to the study area. There is no east-west arterial that crosses the floodplain/river along the eastern boundary
- The only east-west gateway into the study area is through First St/Lee St, which is about 1.25 miles east-west of Pat Booker Rd
- The intersections of Hwy 78 / Charles William Anderson Loop and IH-35/Charles William Anderson Loop represent opportunity zones that could be leveraged to attract additional visitors or shoppers through development.

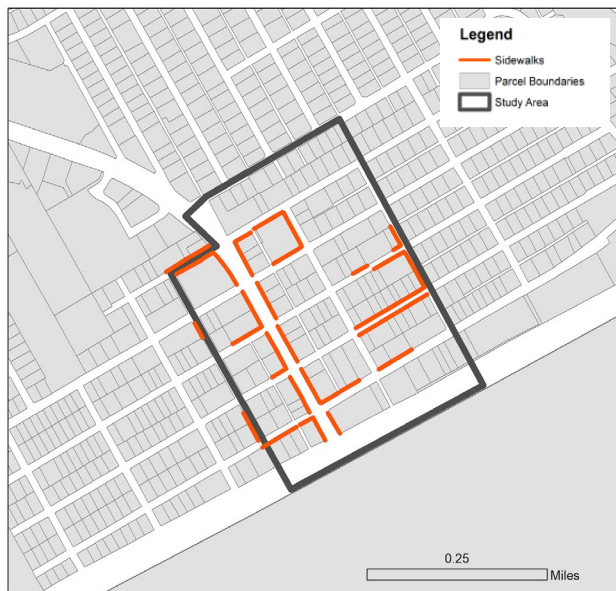


- While the area street grid provides connections through and within Universal City, there are only two direct gateways into the study area
- There is approximately 350 feet between the study area and the entrance of the base, however 150 feet of this is the railroad ROW.

Local Mobility and Access

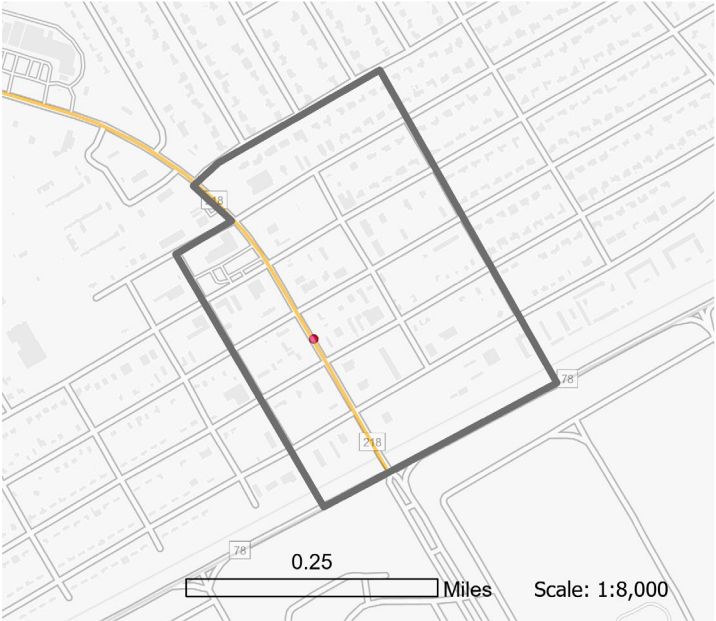


- The study area has multiple connections to the Cibolo Creek trails systems and parks to the east and north.
- While some are clearly articulated linkages to trails, others represent ROW access that is existing but not constructed. This presents potential opportunities to strengthen connections to the trails system.

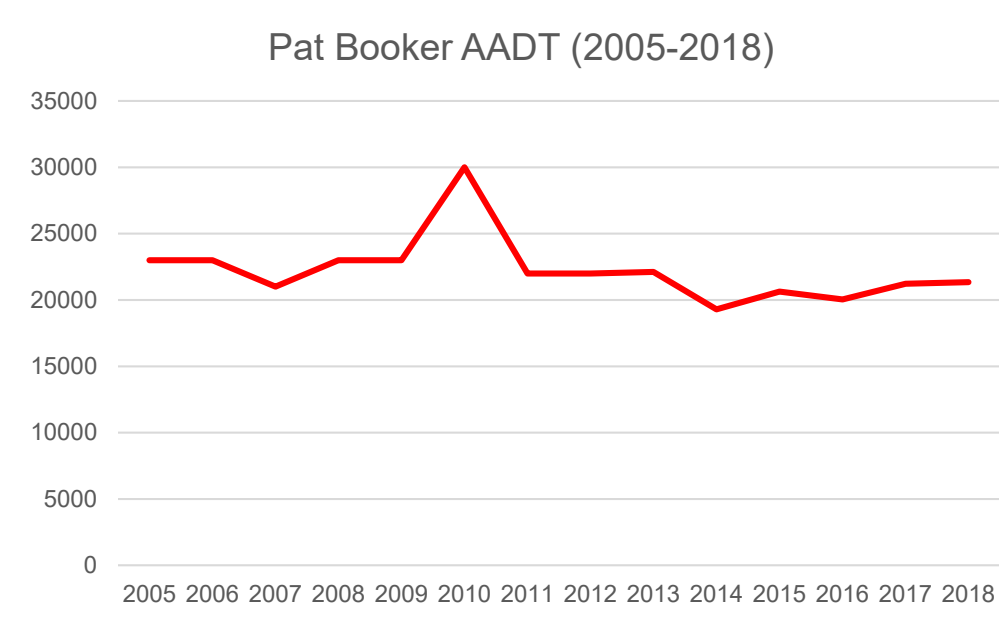


- The study area has walk-friendly block lengths but lacks the infrastructure to encourage non-motorized travel.
- Residential-side streets have either fragmented coverage or no sidewalks at all, while the sidewalks along Pat Booker are bifurcated by wide curb cuts.

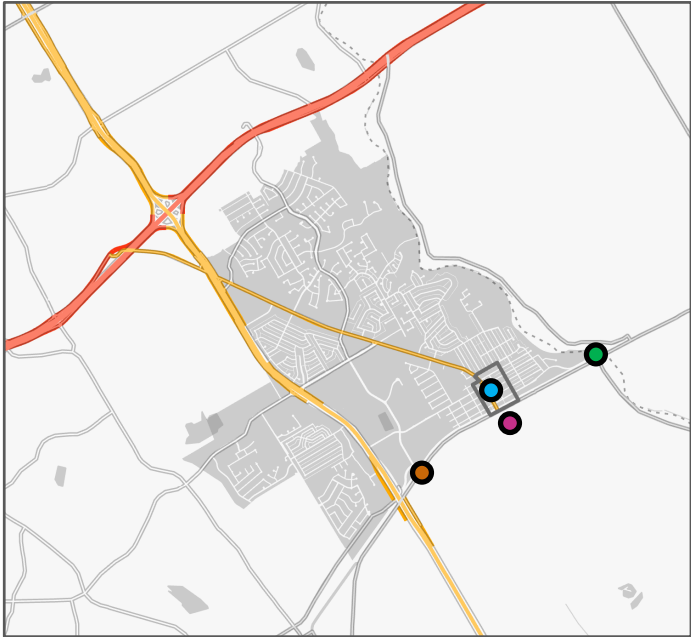
Traffic Counts



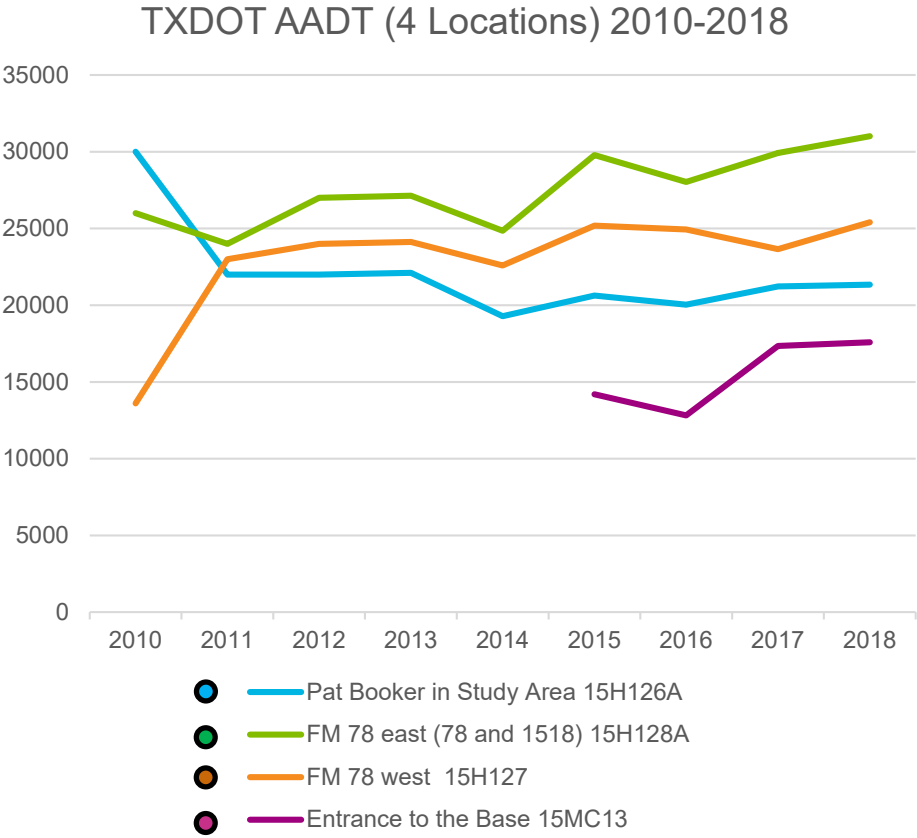
TxDOT reports a count of 21,344 vehicles for annual average daily traffic (AADT) along Pat Booker for 2018. Traffic along Pat Booker peaked for the decade in 2010 and hit its lowest point in 2014 at 19,291.



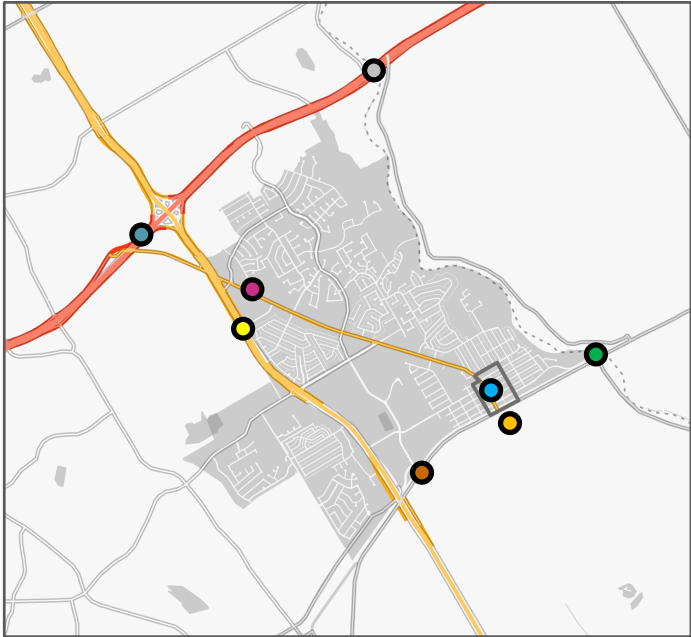
Traffic Counts



Between 2010 and 2018, annual average daily traffic on FM 78 (as measured by count points to the east and west of the study area) is steadily increasing. Traffic on Pat Booker was steadily decreasing from a peak in 2010 until 2016, when traffic counts increased slightly. Notable for this area is that traffic to the base has increased from 14,194 (2015) to 17,585 (2018). [Note—there are not counts for this location prior to 2015).

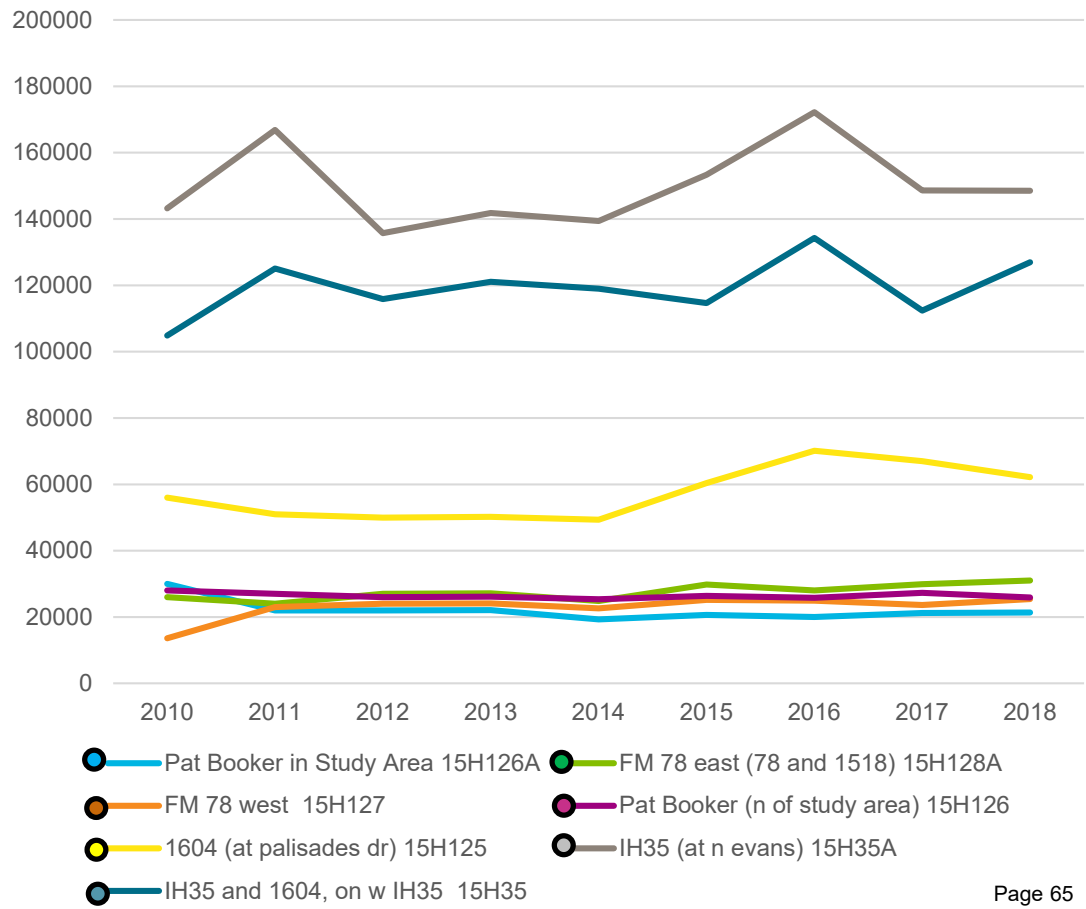


Traffic Counts

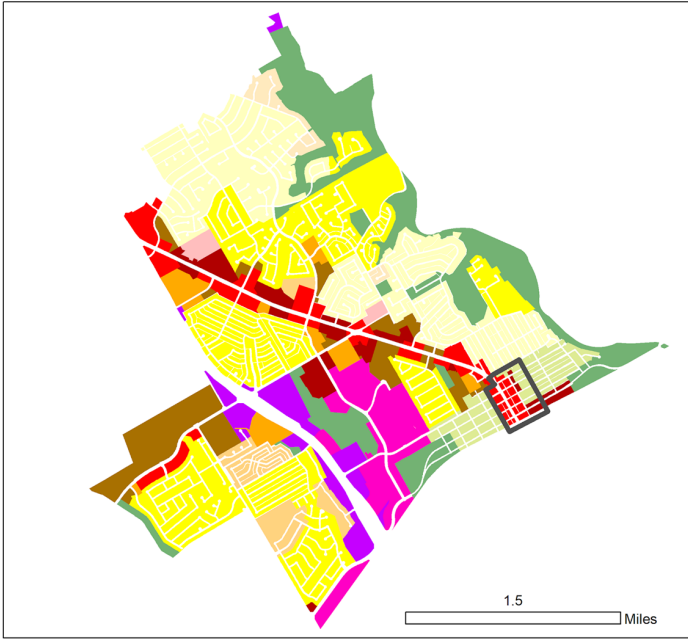


Between 2010 and 2018, annual average daily traffic on 1604 and IH35 has also increased. Regional totals show area traffic has been trending upward since 2014, with a peak in 2016. While the base and FM 78 appear to be capturing a share of this increase, the same does not appear to be true for Pat Booker Road.

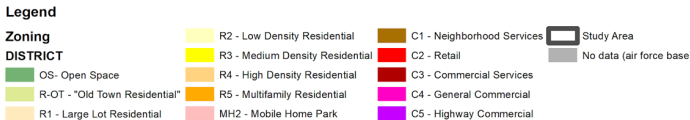
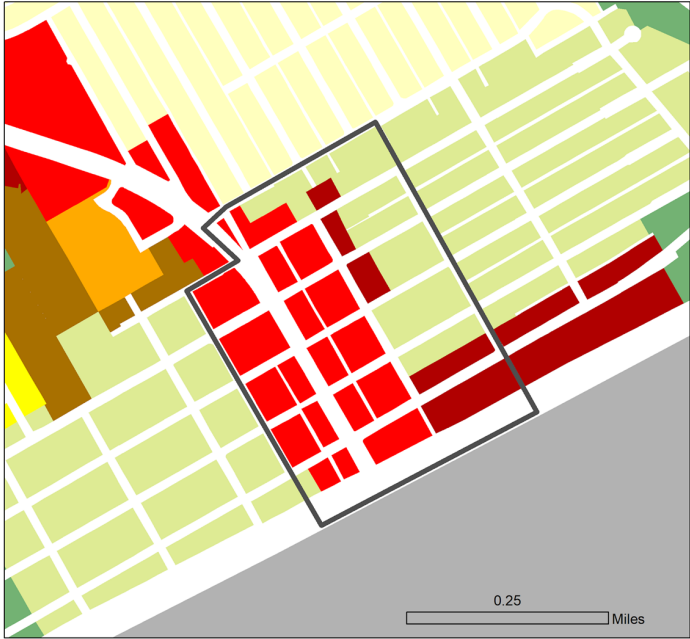
TXDOT AADT (7 Locations) 2010-2018



Zoning



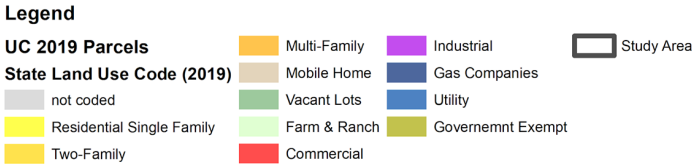
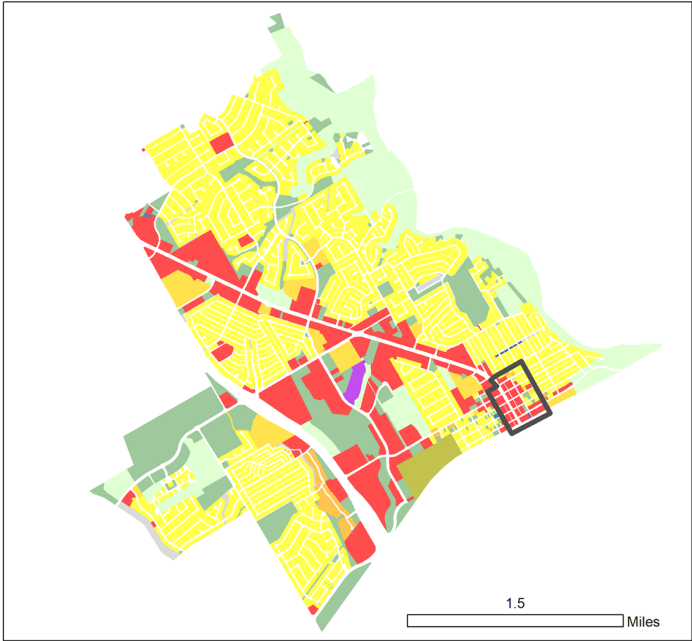
Zoning--University City



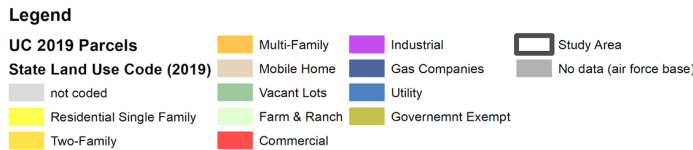
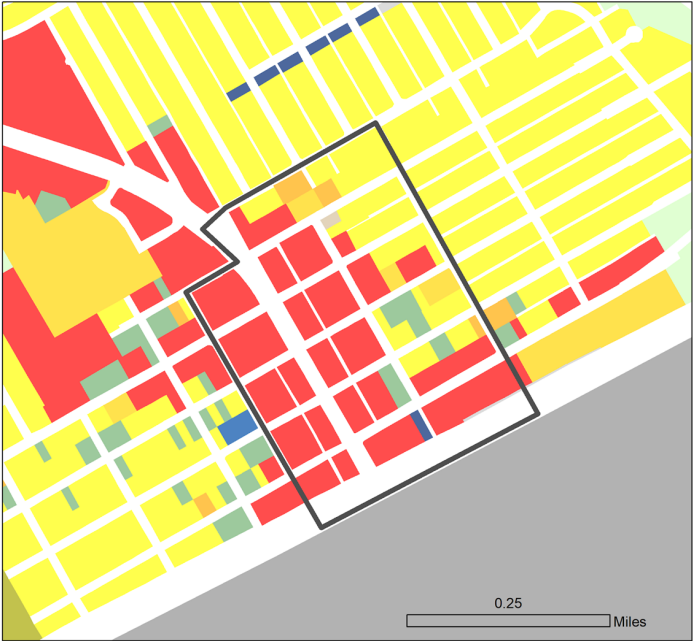
Zoning

- The Study area is composed of 3 primary zoning categories: Retail (C2). Commercial Services (C3), and Old Town Residential (R-OT).
- The "old town" district is established for higher densities of single family housing, and code indicates that future development should remain consistent with original character of subdivision to maintain historic integrity.
- The city currently has no mixed use or form base zoning options.

Land Use



Land Use--University City

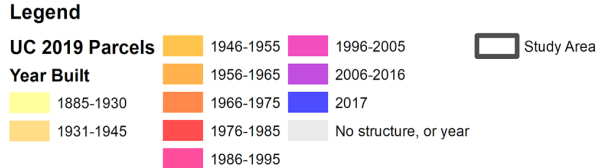


Land Use

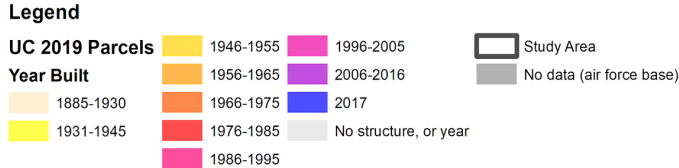
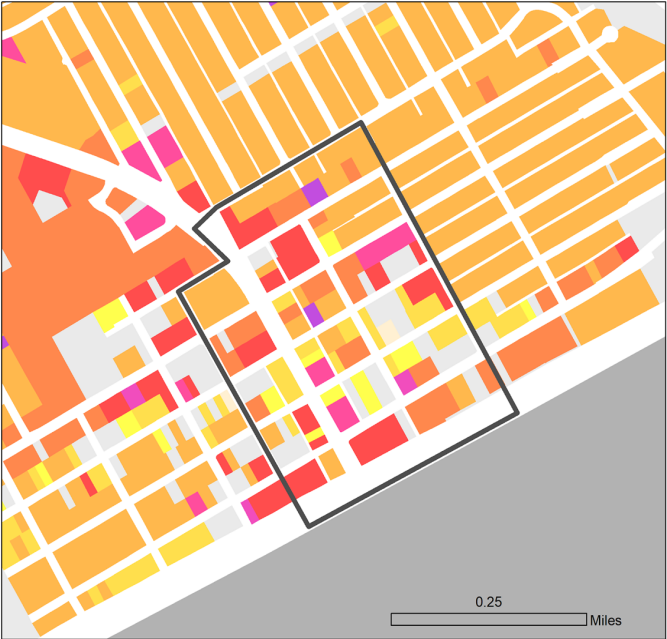
- The land use within the study area is predominately commercial- mostly 1 story small retail structures along the corridor. *
- Moving east and west from Pat Booker, land use is primarily one or two family residential
- Land uses within a ¼ mile buffer of the study area include low density residential and some multifamily

* Land uses as shown are derived from state land use categories and will be updated with additional observation as required.

Housing Stock



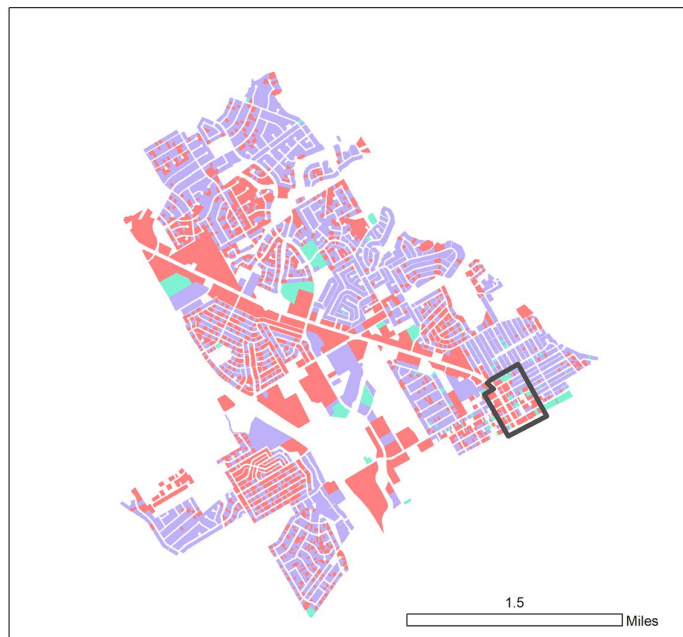
Structure Age--Universal City



Structure Age--Universal City

- Per the Real Estate Study, as of 2017, 18% of housing units in Universal City were built before 1970, compared to only 11% of units in the next oldest City (Live Oak)
- Of the 130 parcels within the study area that have structure age information (107) over 65% were built before 1968.
- Only two structures appear to have been constructed in the study area since 2006.

Susceptibility to Change



Legend

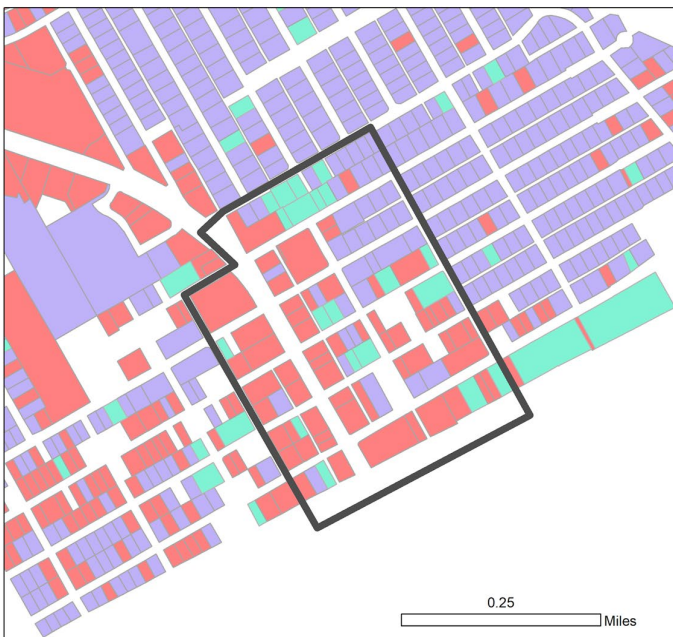
LandVal / ImprVal

0.0008144 - 0.1000

0.1001 - 0.2000

0.2001 - 12090

Study Area



Legend

LandVal / ImprVal

0.0008144 - 0.1000

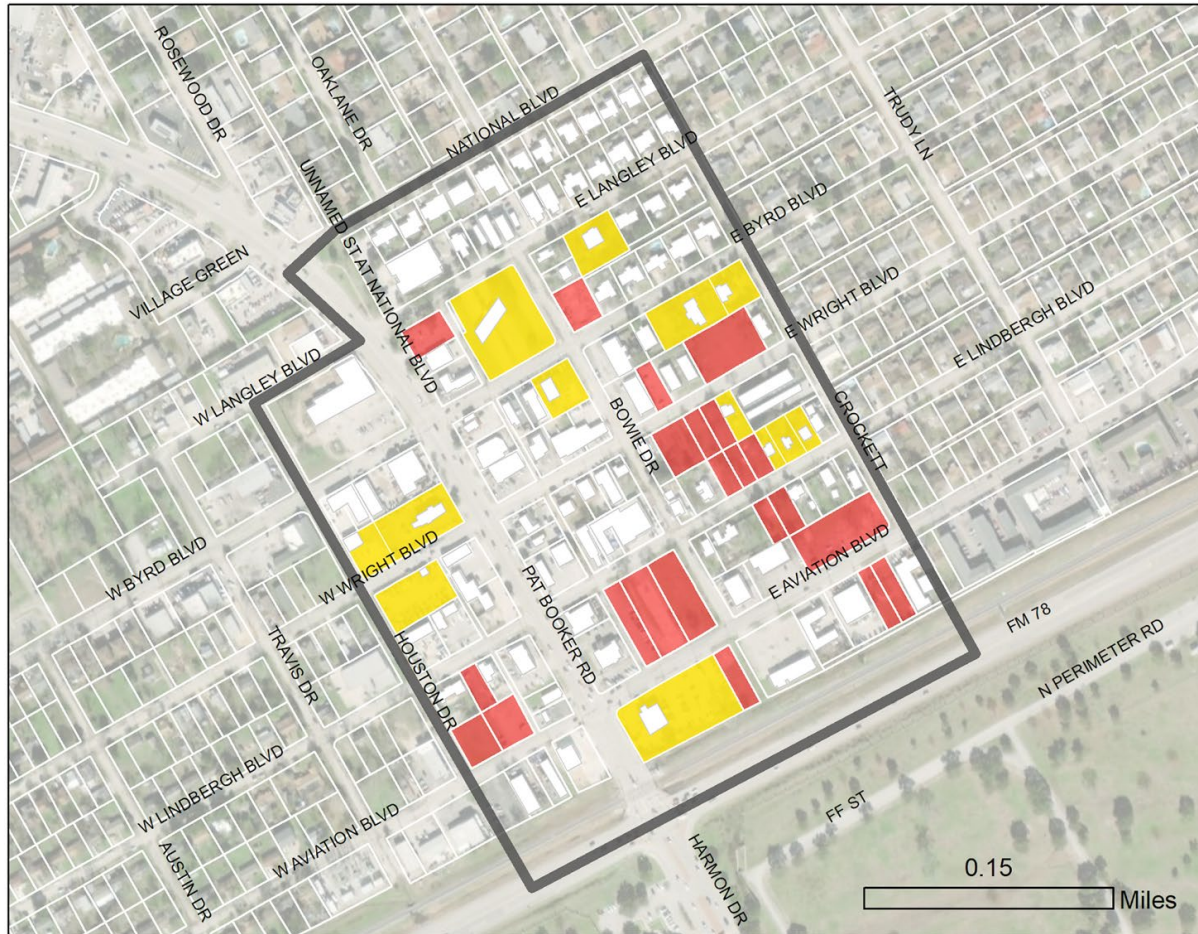
0.1001 - 0.2000

0.2001 - 12090

Study Area

- The map to the left shows a ratio in decimal form of the value of the land and the improvement value. Properties for which the land value exceeds 20% of the improvement value can be considered susceptible to change.
- 59 of the 130 parcels in the study area have a land value that meets or exceeds 20% of the improvement value of the property (parcels in red). Most are commercial parcels along Pat Booker Road.
- Properties with land value that meets or exceeds 20% of the improvement value are considered susceptible to change because the improvements to the structures on the lot are not keeping pace with the value of the lot itself. In other words, increasingly valuable parcels that can be utilized for other purposes are held back by existing structures without comparable value.

Land Vacancy and Utilization

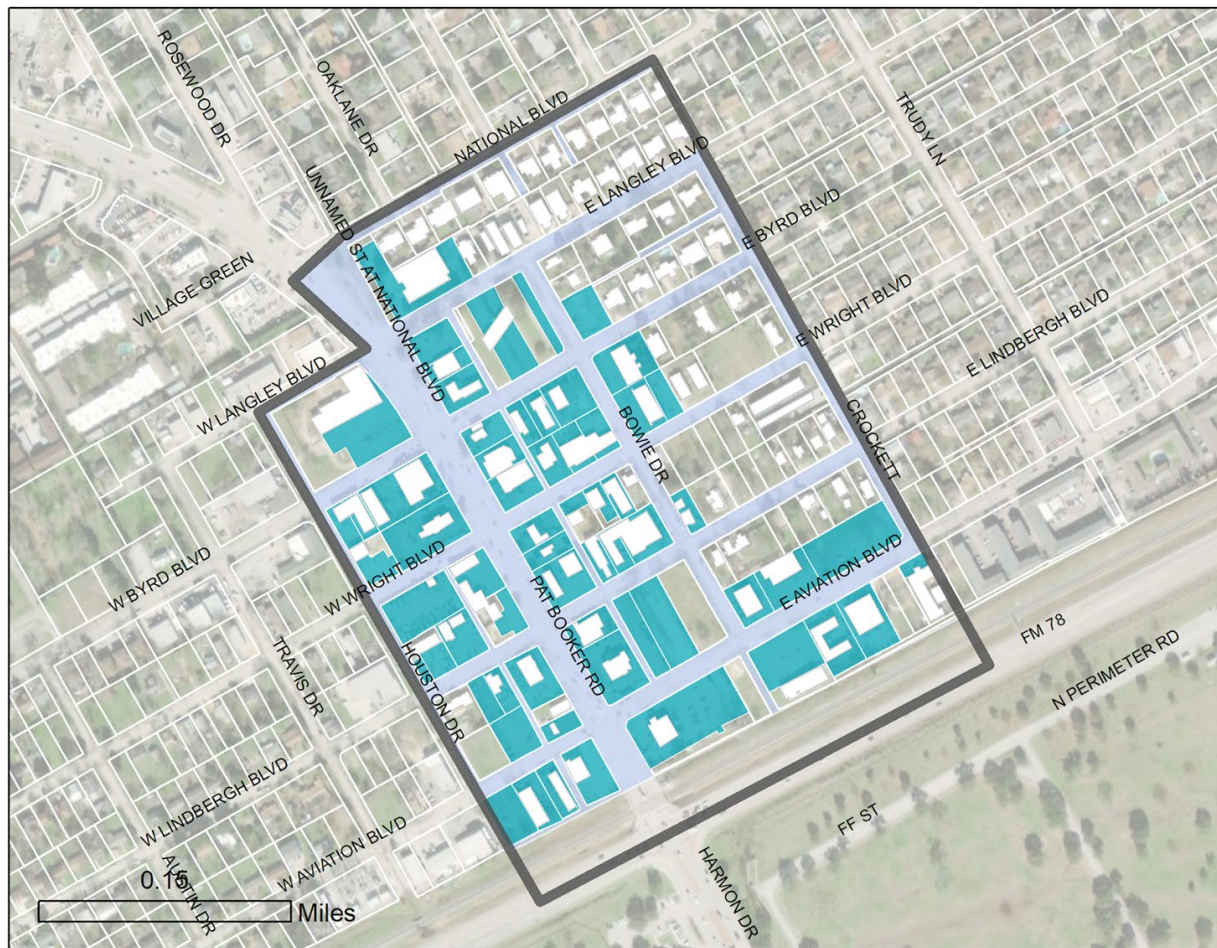


- There is about 340,000 sf of vacant land (shown here as vacant or lots exclusively for parking) across 22 parcels in the study area.
- 13 parcels have under 20% building coverage as a percent of the overall lot. This indicates that there is a significant amount of underutilization of land in the study area.

Legend

-  Study Area
-  Building Footprint
-  Vacant Parcels
-  Less than 20% building coverage

Parking and Impervious Surfaces



- Right-of-way accounts for about 924,884 square feet in the study area. With the exception of the sidewalk buffer zones and unimproved alleys, its area counts towards overall impervious surface cover.
- The study area has about 63 surface parking areas, totaling approximately 856,980 sf of pavement.
- 115 structures cover approximately 424,679 sf. The average building size is 3,692 sf.

Ownership

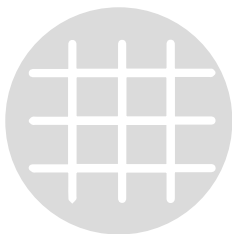


- There are 98 unique landowners for the 130 parcels in the study area. (each color change represents a change in owner id)
- The individual owner with the most properties (Palomino Properties Inc) controls 6 parcels and approximately 70,000 sf.
- Properties are in general owned by individuals (73%) rather than corporate entities. There is at least one church-owned property in the study area.



S.W.O.Ts





LOCATION

- Adjacency to Randolph Air Force provides an economic opportunity for the study area, as base visitors can become future retail clientele and rental occupants.
- Study area is outside of the 'limited use overlay' from the runways at Randolph Air Force.

LAND USE MIX

- Current diverse land uses, including multifamily, single family, and a mix of commercial.
- There are a number of small local businesses--tattoo shops, hair salons, cigar shops, and a wig shop--that successfully operate in the area.
- Opportunities to leverage existing businesses for the development of the study area's character, while minimizing the displacement of current residents and business owners.



STREET GRID

- The study area has a well-connected street grid with block faces typically around 200 feet, a strength as other parts of town outside of the major commercial corridors have poor connectivity (cul de sacs, dead ends).
- Existing alleys, can be converted into rear entry use for townhomes, bike paths, or for other public mobility uses without the need to acquire additional ROW.

RECREATIONAL CONNECTION

- Veterans Park is within 15 minute walk from the study area, opportunity to connect to existing park system through bike trails.
- Opportunity to link into the existing trails system.





AGING STRUCTURES/INFRASTRUCTURE

- There are 130 parcels within the study area; of those there are 107 buildings and 65% of the buildings were built before 1968. The existing infrastructure in the study area was likely built before this time.
- Existing wastewater lines run in the back of alleys/rear of lot, which can be challenging for long term maintenance. Any redevelopment effort that does not utilize them will have to close them in place or re-route.

SMALL PARCELS

- The average parcel size in the study area is 0.30 acres; the 130 parcels have 98 unique owners.



RAIL ADJACENCY

- Union Pacific Railroad (UPR) runs along the southern portion of the study area, limiting road access into the project area.

LACK OF URBAN DESIGN

- While the street grid establishes good connectivity, a lack of sidewalks makes the study area hard to transverse as a pedestrian or biker. Curb cuts along Pat Booker also limit walkability.

LACK OF TRANSPORTATION OPTIONS

- The study area offers no connection to the Regional Transportation System. The nearest public bus stop (at Wind Burn TR. & Toepperwein, on the 21) is an hour walk from the site, approximately 3.3 miles, and is the only one.



LAND LOCKED AND BUILT OUT

- The study is nearly built out, signifying infill development needs to occur.



RECONFIGURE PARKING

- Many properties along the Pat Booker commercial corridor have parking at the front, separating the building from the street. Reconfiguring surface parking facing the corridor, while ensuring parking is available for new development, will allow for the creation of a more active street front.

VACANT AND UNDERUTILIZED LAND

- Opportunity to attract investors, average size of homes in the study area are smaller in size compared to newer homes and cover less acreage signifying less expensive real estate to purchase. The average house in the study area is 10% smaller and covers 10% less land



REAL ESTATE DRIVER

- There is a need an opportunity to create a product that's recognizable to the market, which could other property owners to reinvest

ENHANCE RELATIONSHIP TO BASE

- The study area has a deep connection to the Randolph Air Force Base because of proximity and development history. There is an opportunity to create a district within the Study Area to serve the base population and provide amenities the base is under server its populace.
- Opportunity to create enhanced use lease and/or public private ventures within the Study area





COMPETITION

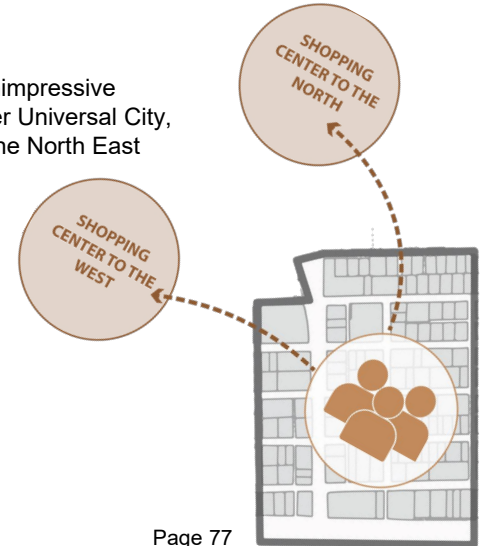
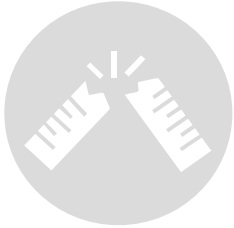
- In both residential and commercial uses, cities adjacent to Universal City provide competitive options that the study area cannot yet meet
- The Shopping center at Olympia Parkway captures a large share of economic development because of its connection to the highway, and because it is relatively new
- Newer housing options are being built east of Veterans Park

MAN-MADE & ENVIRONMENTAL CONSTRAINTS

- Selma Creek runs along the eastern side of the study area. There are no arterial roads that cross the creek creating a natural barrier dividing Universal City from Selma City and Schertz City.
- UPR runs along the southern side of the study, limiting the South entrance into the study area

PUBLIC PERCEPTION

- Because of the lack of access, the public perception of Universal City has been unimpressive
- Other than the Randolph Air Force, there is no driver to gravitate the public to enter Universal City, the success of the Study Area is dependent on establishing commercial retail on the North East corner of FM 78



Case Studies



Location: Mueller, Austin, USA

Scale: 700 acre of Planned Unit Development

Why we choose it: Redevelopment

Background:

- Formerly the **site was Mueller Municipal Airport**. The surrounding neighbourhoods suffered as it was isolated from downtown due to the presence of this airport and also the interstate 35 that became a barrier.
- That vision and the **airport closure in 1999 paved the way for redevelopment** of the airport site with a planned community, Mueller, consisting of various housing types, commercial properties, and a network of green spaces.

Success Indicator:

- Within a few years of the redevelopment, **Mueller has transformed from a vacant airfield into a bustling community** of jobs, housing, retail and commercial development, offering opportunities for citizens of all income levels.

Creative Mixed Use

Urban Design

Town Center/District



BEFORE: Mueller Airport



AFTER: New Development

Source:

- <https://www.planning.org/awards/2015/muellerredevelopment.htm>
- <https://www.huduser.gov/portal/casestudies/study-1152016-1.html>

Location: San Diego, California, USA

Scale: 510-acre historic naval facility

Why we choose it: Adaptive reuse

Background:

- **Historically** the site was a **Naval Training Center** in Point Loma, San Diego, however in the **mid 90's the training center was shut down** and the city envisioned to reuse the site to be a landmark as a community gathering space.

Success Indicator:

- Liberty station today has a **broad mix of uses** including schools, church, neighborhood serving retail center, civic arts and cultural district.
- Former Naval Training centers redevelopment is a success story of an adaptive reuse project with a **thriving, heritage-inspired hub for commerce**, historical reflection of spanish Colonial Revival architecture and the arts.
- The **market is attracting real estate investment** and this growth has been widespread across asset classes
- The project also won International Economic Development Council Honors City For the NTC Reuse plan.



BEFORE: Naval Training Center



AFTER: Liberty Station

Creative Mixed Use

Urban Design

Town Center/District



Source:

- <https://www.forbes.com/sites/jeffsteele/2019/09/27/military-history-lives-on-at-san-diegos-liberty-station/#2f1899a6a87>
- <https://www.globest.com/2019/04/10/inside-the-rapid-growth-of-san-diegos-liberty-station/?slreturn=20191021181716>

Location: Silver Spring, Maryland, USA

Scale: 22ac Site

Why we choose it: Urban mixed use infill & historic rehabilitation

Background:

- Located inside Washington D.C., beltway (a major artery running from downtown Washington to the area's outer suburbs) "Silver Spring's core was at one time a non-descript area of parking lots, aging retail, office buildings, and boarded-up storefronts.
- The site area was **littered with several underutilized structures that had fallen into disrepair**
- Montgomery County wanted a catalyst project that would revitalize its core and spur further redevelopment.

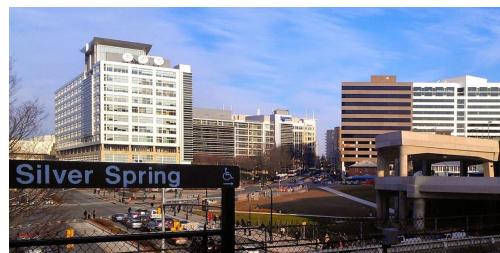
Success Indicator:

- Since the revitalisation efforts in 2005, the downtown today is a **thriving, mixed-use town center** within an arts and entertainment district.
- The new district has retail, entertainment, office, and public spaces and multi-family housing units, as well as **four vibrant, revitalized main streets that are safe and pedestrian-friendly**.
- There has been a rapid **increase in number of residential units** since the redevelopment, with the public and private sectors investing around \$2.5 billion in the area.

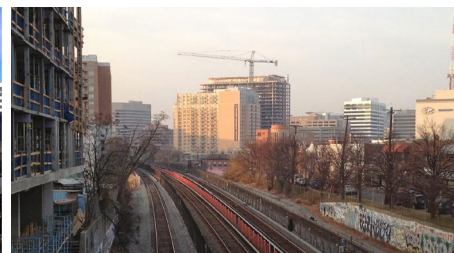
Creative Mixed Use

Urban Design

Town Center/District



BEFORE: Underutilised downtown area



AFTER: Thriving public space

Source:

- <https://casestudies.uli.org/wp-content/uploads/2015/12/C035021.pdf>
- https://wamu.org/story/14/04/04/the_silver_spring_war_inside_the_rebirth_of_a_downtown/
- <https://www.cnu.org/what-we-do/build-great-places/downtown-silver-spring>

Location: Lakewood, Colorado, USA

Scale: 104ac Site

Why we choose it: *Mixed use redevelopment*

Background:

- Former mall - Villa Italia **was one of the largest indoor mall** between Chicago and the west coast for 35 years.
- Despite remodeling efforts, **gradual decline began, caused** in part **by a slowing economy, growing competition**, and poor maintenance.
- By 1999 the property was around 50% vacant, in July 2001 the **mall closed**. Not only was the **104 acre site nearly idle**, but Lakewood's budget was impacted from the loss of sales tax revenue.

Success Indicator:

- A suburban mall redevelopment that is now **serving as an economic and cultural center** for the city of Lakewood.
- Today, the **redevelopment has increased community property values**, adding more than 12,000 jobs, \$17m in annual tax revenue and \$200m in annual retail sales.
- Belmar was bestowed the coveted Phoenix Award for its environmental cleanup significance
- It continues to grow as a **vibrant pedestrian-oriented city center** and economic engine to the City of Lakewood.

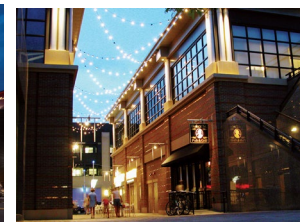
Creative Mixed Use

Urban Design

Town Center/District



BEFORE: Villa Italia Mall



AFTER: Belmar Urban Center

Source:

- <http://coloradobrownfields.org/portfolio/belmar-mixed-use-redevelopment-lakewood/>
- <https://urbanland.uli.org/development-business/belmar-urbanizing-a-suburban-colorado-mall/>
- <https://www.arcadis.com/en/united-states/what-we-do/our-projects/north-america/united-states/belmar-urban-center-a-new-downtown-for-lakewood/>

Five Key Initial Strategies for Masterplan Framework

STRATEGY 1: Gateways

- Explore ideas for connectivity to the air force base, adjacent neighborhoods, and the trails and parks to the east. This may include bike connections, sidewalk extension, wayfinding, or other elements that develop the identity to the East Aviation District and encourage exploration there.

STRATEGY 2: Access

- Identify access management strategies to reduce mode conflict on Pat Booker and improve walkability, such as reducing curb cuts or paving existing alleys for rear access to businesses.

STRATEGY 3: Utilization

- Verify vacant and underutilized parcels and explore possibilities for aggregation and redevelopment that are sensitive to neighborhood context and history.

STRATEGY 4: Activation

- Identify opportunities to activate the street frontage along primary through streets in the study area, such as the reuse of surface parking adjacent to the right of way.

STRATEGY 5: Engagement

- Cooperate with community partners to identify needs and concerns about redevelopment and change in the East Aviation area.

