

# The Walkable Urban Rebound

San Antonio at the Tipping Point

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*San Antonio Housing Summit*  
*September 30<sup>th</sup>, 2016*

A nighttime photograph of a city street. The scene is illuminated by warm, glowing string lights strung across the street. On the right, a brick building with a classical facade features a sign that reads "CURED" above its entrance. To the left, a modern multi-story building with large windows is visible. People are seen walking and sitting on a bench in the foreground, creating a sense of a vibrant, walkable urban environment.

# The (Walkable) Urban Rebound

*“Walkable urbanism development is now propelling real estate growth in office, retail, and multi-family rental product types from a rental premium and absorption basis in the largest 30 U.S. metros.”*

*- Foot Traffic Ahead: Ranking Walkable Urbanism in America's Largest Metros, 2016*



**Walkable Urban**



**Driveable Suburban**

A photograph of a suburban commercial area. In the foreground, there is a large, paved parking lot. In the background, there is a gas station with a sign that says "W-E-B" and several cars parked. The sky is clear and blue.

# Drivable Suburban

- Historically low-density development (generally 0.05 to 0.4 floor area ratio or FAR)
- Segregated real-estate product types (different real estate product types generally separated from one another)
- Standardized product types that, aside from superficial architecture, are similar throughout the country
- Cars and trucks as the predominant transportation mode.

This is often called  
**SPRAWL...**

# Walkable Urban Development

- Substantially higher densities (1.0 to 40 FAR, though mostly in the 1.0 to 4.0 range)
- Mixed-use real-estate products, or the adjacent spatial mix of products
- Emerging “new” product types, such as rental apartments over a ground-floor grocery store
- Multiple transportation options, such as bus, rail, bicycle, and pedestrian-friendly sidewalks, as well as motor vehicles, that connect to the greater metro area.

We call these Walkable Urban  
Places or “WalkUPs” for short...

**WALKABLE URBANISM OF THE  
30 LARGEST U.S. METROPOLITANS:**

# Current Ranking

RANK	METRO AREA	# OF WALKUPS	POPULATION			OFFICE, RETAIL & MULTI-FAMILY RENTAL OCCUPIED SPACE			
			Total in Metro Area	Per WalkUP	Rank (Pop. per WalkUP)	% Office Located in WalkUPS	% Retail Located in WalkUPS	% Multi-Family Located in WalkUPS	% Total Located in WalkUPS
1	New York City	67	20,942,101	312,569	21	55%	13%	39%	38%
2	Washington, DC	44	5,037,427	114,487	2	53%	20%	23%	33%
3	Boston	54	5,035,729	93,254	1	45%	17%	31%	32%
4	Chicago	38	8,509,657	223,938	13	43%	15%	33%	30%
5	San Francisco Bay	56	7,360,487	131,437	4	37%	21%	19%	25%
6	Seattle	25	3,810,651	152,426	6	42%	12%	17%	22%
7	Portland	16	2,017,438	126,090	3	39%	15%	12%	19%
8	Pittsburgh	11	2,575,124	234,102	15	35%	6%	15%	18%
9	Denver	18	2,962,508	164,584	7	29%	8%	15%	17%
10	Philadelphia	17	5,302,186	311,893	20	25%	10%	14%	17%

Metropolitan areas are ranked according to their current levels of walkable urbanism.

The walkable urbanism of each metro is determined to be the share of office, retail, and multi-family rental occupied space located in its WalkUPS in 2015.

Rankings are divided into four levels of walkable urbanism, which are described on the following pages.

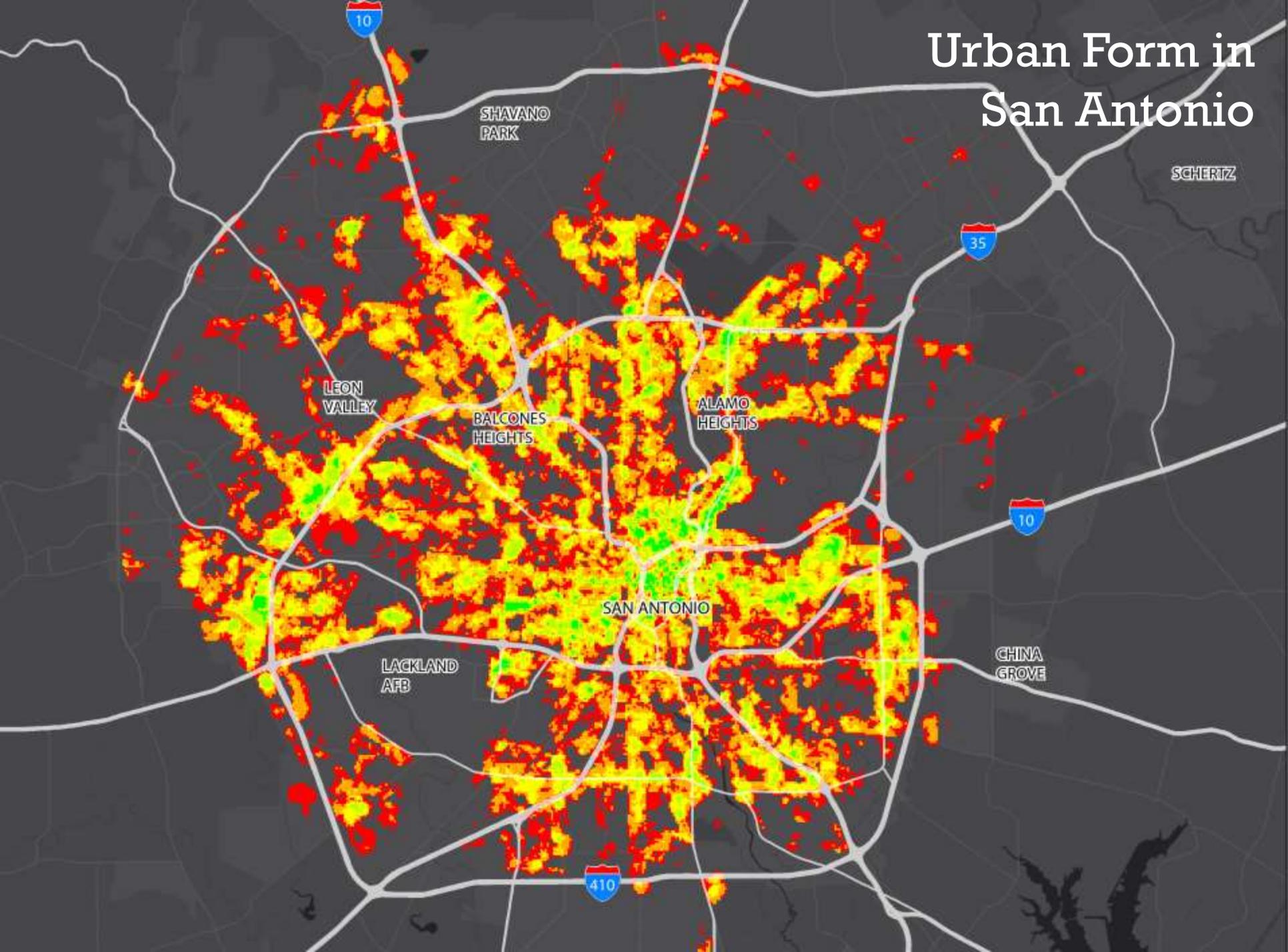
<b>28</b>	<b>San Antonio</b>	<b>2</b>	<b>1,863,530</b>	<b>931,765</b>	<b>28</b>	<b>10%</b>	<b>3%</b>	<b>1%</b>	<b>3%</b>
13	Minneapolis-St. Paul	11	2,920,637	265,512	17	30%	6%	10%	15%
14	Cleveland	10	2,064,517	206,452	11	36%	5%	7%	14%
15	St. Louis	10	2,580,896	258,090	16	26%	4%	9%	12%
16	Kansas City	9	1,928,582	214,287	12	25%	6%	6%	12%
17	Los Angeles	53	18,413,866	347,431	22	23%	7%	8%	11%
18	Cincinnati	7	2,007,335	286,762	18	27%	6%	5%	11%
19	Baltimore	15	2,704,957	180,330	9	18%	9%	8%	11%
20	Houston	16	6,175,417	385,964	24	29%	6%	4%	11%
21	Detroit	32	4,706,797	147,087	5	22%	6%	7%	10%
22	Miami	20	5,771,020	288,551	19	18%	8%	8%	10%
23	Sacramento	6	2,328,199	388,033	25	22%	5%	4%	9%
24	San Diego	14	3,183,143	227,367	14	13%	7%	6%	7%
25	Dallas	18	6,694,445	371,914	23	10%	9%	5%	7%
26	Las Vegas	2	2,014,260	1,007,130	29	7%	8%	3%	5%
27	Tampa	6	3,326,846	554,474	26	11%	2%	2%	4%
28	San Antonio	2	1,863,530	931,765	28	10%	3%	1%	3%
29	Phoenix	4	4,204,089	1,051,022	30	11%	1%	1%	3%
30	Orlando	3	1,921,825	640,608	27	11%	1%	2%	3%

**KEY:**

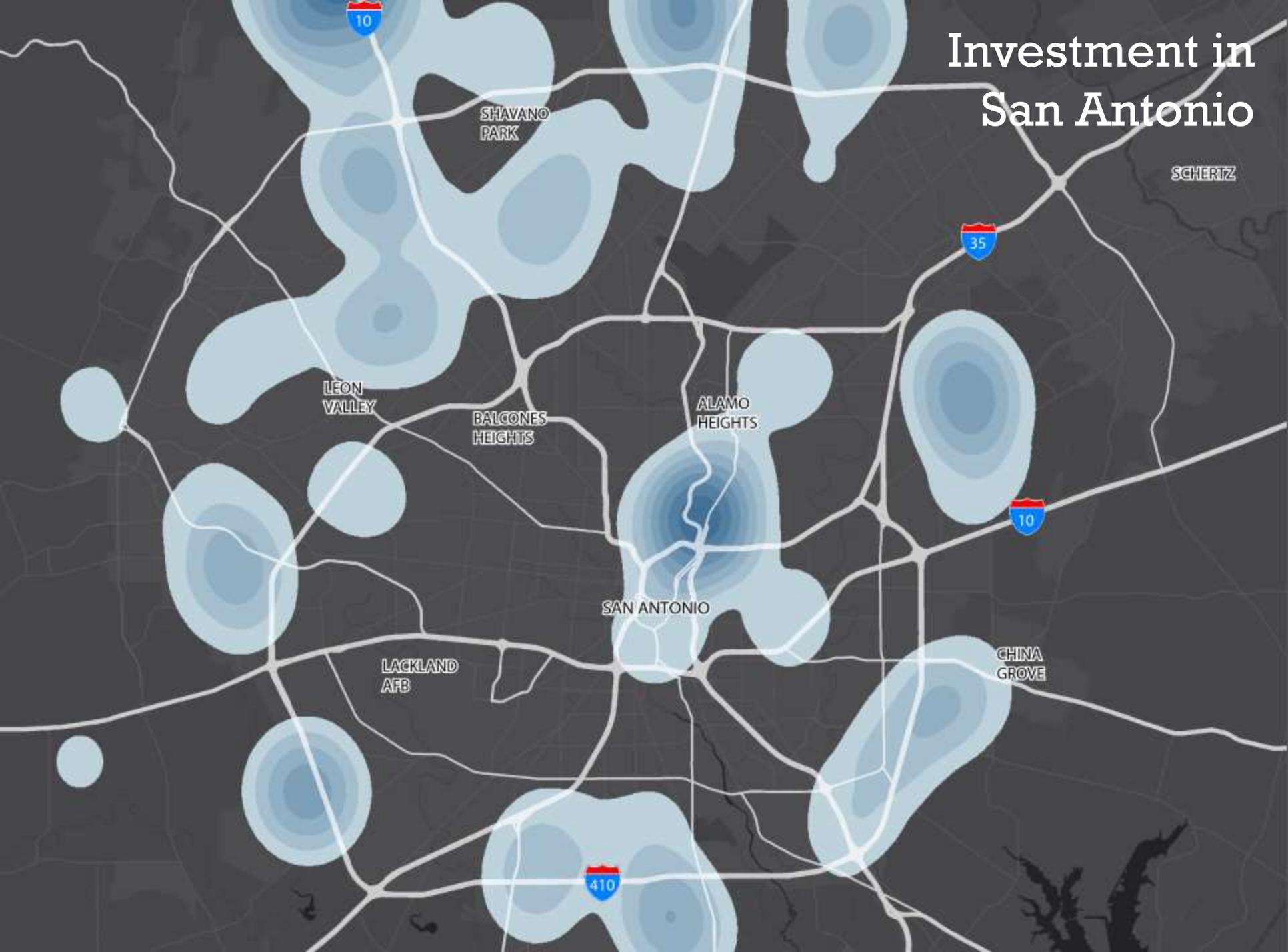
*Levels of Current Walkable Urbanism*

- LEVEL 1: HIGHEST WALKABLE URBANISM
- LEVEL 2: UPPER-MIDDLE WALKABLE URBANISM
- LEVEL 3: LOWER-MIDDLE WALKABLE URBANISM
- LEVEL 4: LOWEST WALKABLE URBANISM

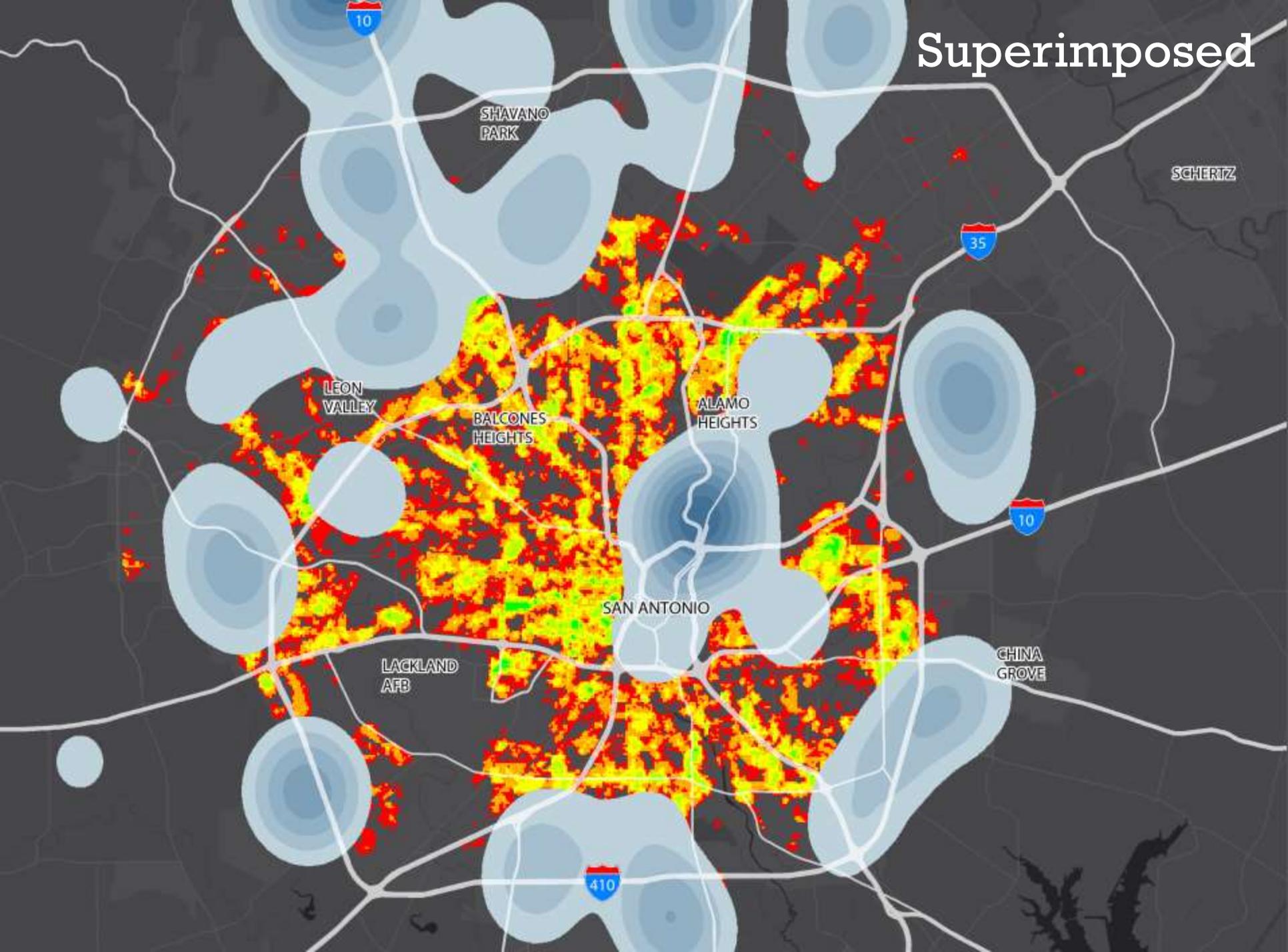
# Urban Form in San Antonio



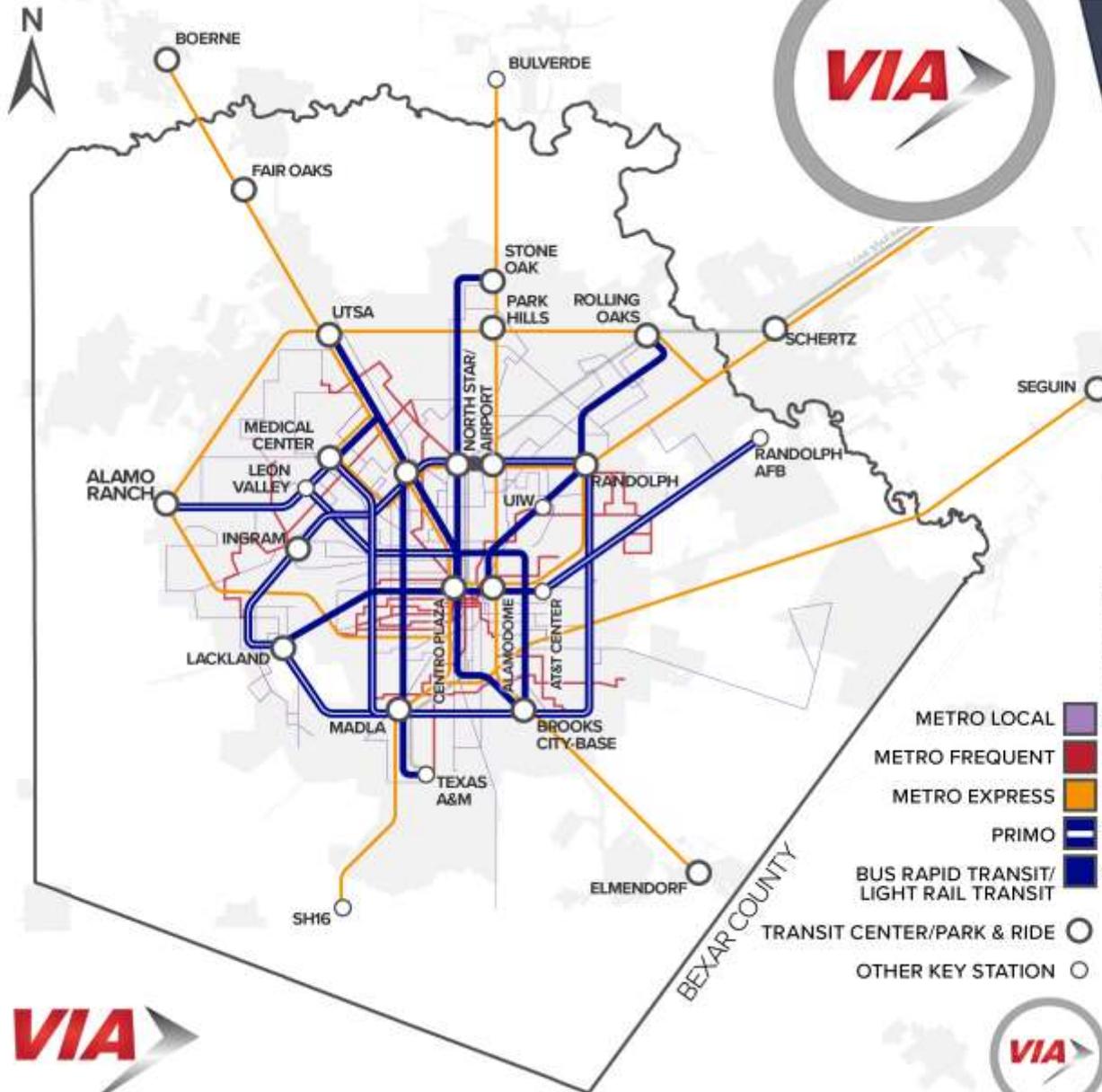
# Investment in San Antonio



# Superimposed



# VISION 2040



	FREQUENCY	DEDICATED LANE	STOP SPACING
METRO LOCAL	20	N	●-●-●-● (1/4 mi)
METRO FREQUENT	12	N	●-●-●-● (1/4 mi)
METRO EXPRESS	15	Y	●-●-● (10 mi)
PRIMO	10	N	●-●-● (1 mi)
BUS RAPID TRANSIT/ LIGHT RAIL TRANSIT	10	Y	●-●-● (1 mi)
TRANSIT CENTER/PARK & RIDE			○
OTHER KEY STATION			○





**“Incentivize transit supportive development opportunities and incorporate transit supportive infrastructure improvements to promote transit use.”**

**“Continue to focus on the revitalization of neighborhoods adjacent to downtown and extend these efforts to regional centers, urban centers and transit corridors.”**

**“Work with VIA Metropolitan Transit to develop a long-term transit plan that facilitates transit-supportive development.”**

# Where are we now?

- In large metros, investment is starting to shift from “**driveable suburban**” to “**walkable urban**”
- San Antonio is **starting** to experience this shift, but not to the same degree as peer metros.
- Recent **planning efforts** align with this market shift and may **hasten** its arrival.

# San Antonio at a Tipping Point

mySA Local US & World Business Sports Food Entertainment Lifestyle Opinion

## Dissecting the Decade of Downtown

Forum to dissect progress, prognosis of the city initiative

Published 12:00 am, Saturday, October 31, 2015

✉ f t p s



RIVARD  REPORT

Urban. Independent. All About San Antonio.

## San Antonio, Under Construction: We're Not Slowing Down

LORENZO GOMEZ III on 24 March, 2015 at 11:55

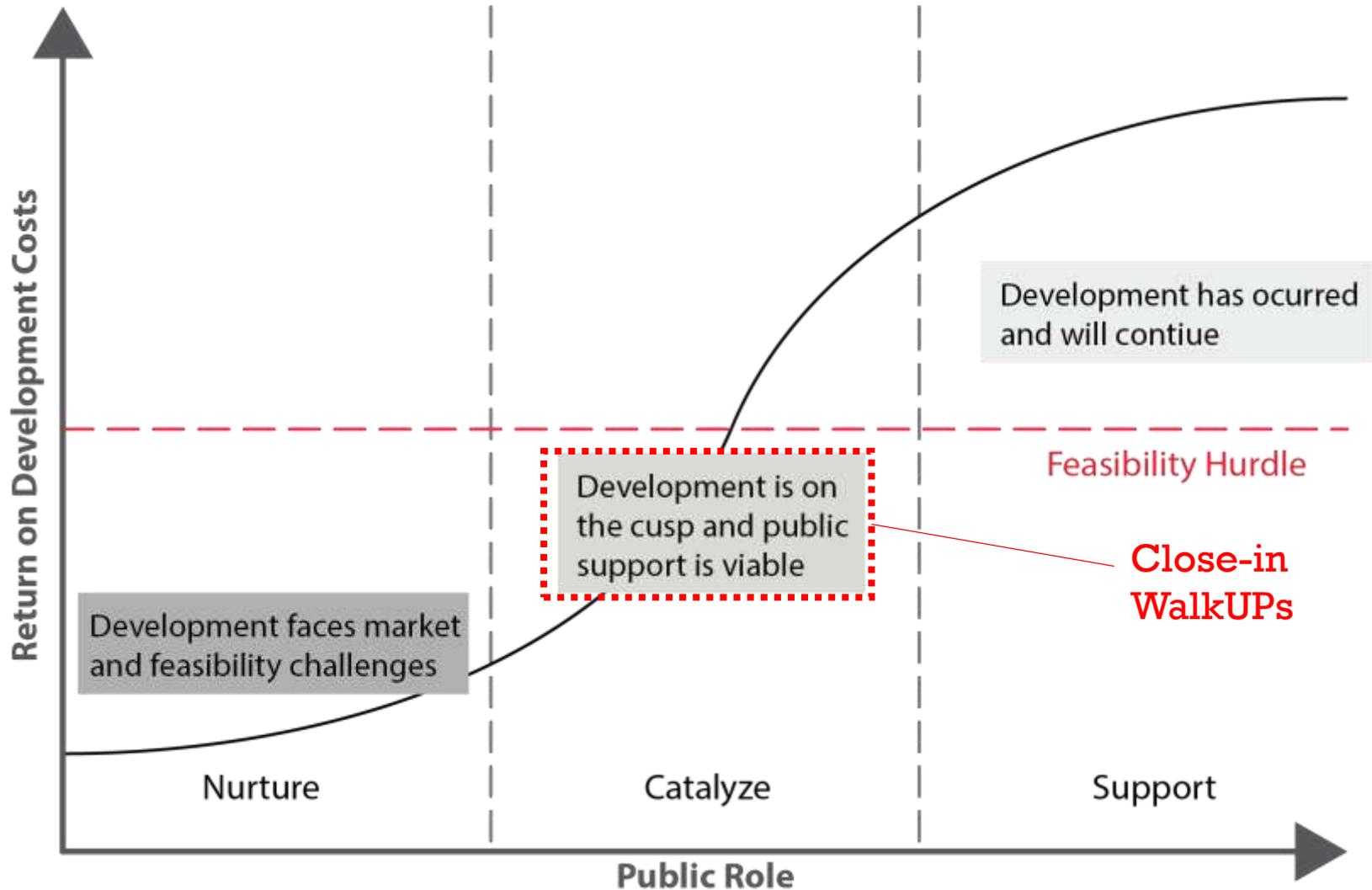


# Urban Amenities Can Be Catalysts for Redevelopment

- Parks and Open Space
- Transit
- Commercial Amenities
- Traffic Calming
- Walkability
- Bicycle Connectivity



# Feasibility Curve



# FROM DRIVEABLE SUBURBAN



# TO WALKABLE URBAN



CONDOS KILL CULTURE



# Austin

## Austin council moves forward with assistance for displaced renters



### Inheriting inequality

In greater Austin homes, the poisonous legacy of segregation continues to cut off the African-American population from economic opportunities and its own cultural anchors, threatening the whole region's potential. Read the American-Statesman's

PLANETIZEN

### How Austin Renters Are Resisting Displacement

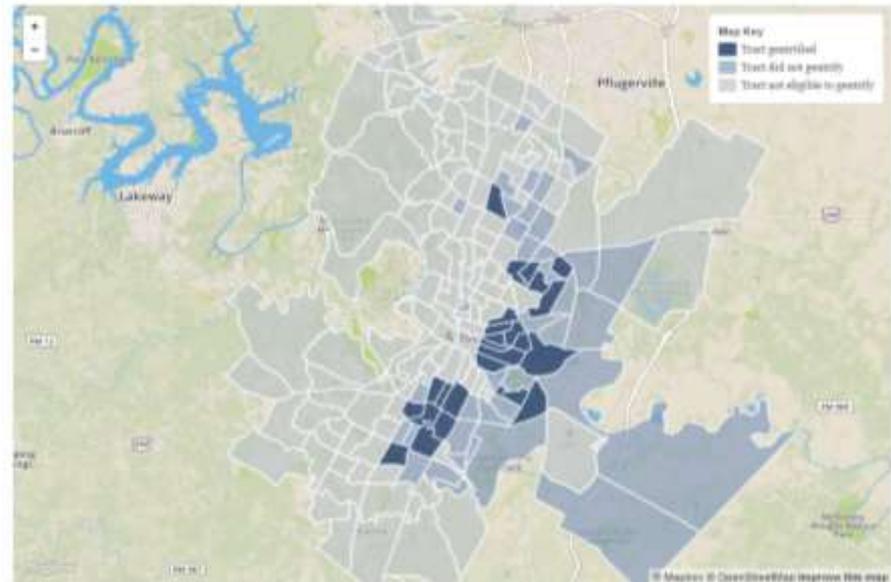
### Eastward Expansion

Real estate prospecting on the Eastside

BY TOMY CARTER, PH.D., APRIL 16, 2015

### Austin Gentrification Map: 2000 Census - Present

Click a tract to display its demographic data



NOTE: Data shown correspond to current tract boundaries, which may have changed from prior Census years. Figures are calculations from 2000-2014 American Community Survey estimates.

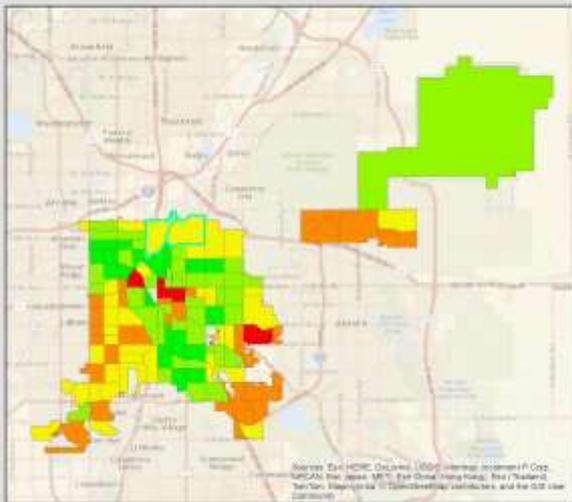
# Denver

## THE DENVER POST

**BUSINESS**  
Denver seeks gentrification without displacing residents



### Denver Property Appreciation, 2000-2012



This map shows the ratio of each home value appreciation rates to the city-wide median appreciation rate from 2000 to 2012. Home values were converted to 2012 dollars. In certain areas, data was unavailable, or no homes were in the area during data collection. Tracts are colored by quartile.

Glendale and Elyria-Sevens are highlighted with green borders.

Sources: 2000 U.S. Census, 2009-2012 American Community Survey, National Historical Geographic Information System, ESRI.

Map layout: Douglas Ireland

the guardian

world opinion sports soccer tech arts lifestyle fashion business travel environment [browse all sections](#)

development UK europe americas asia middle-east africa australia

### White privilege and gentrification in Denver, 'America's favourite city'

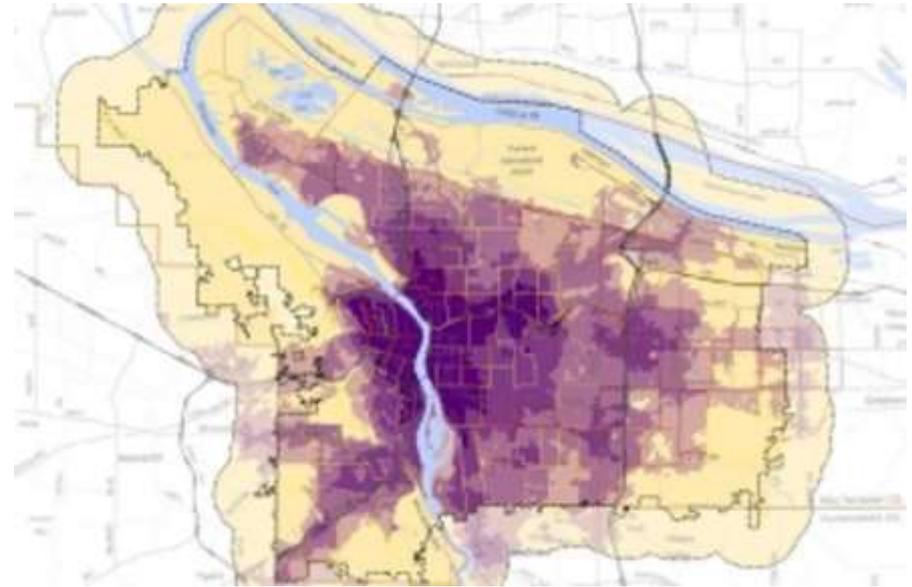
For the first time in its history, Denver is so desirable that its vast neighbourhoods of bungalows are proving finite. The cost of this growth is the displacement of the city's remaining working class



# Portland



Portland is the most gentrified city of the century



**ON** Opinion • Gentrifying Portland: A tale of two cities Show TV U.S. Edition + more

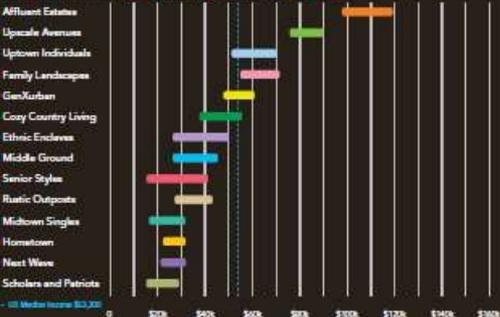
## Gentrifying Portland: A tale of two cities

By **W. Ramana Bell**  
Updated 10:23 PM ET, Fri May 27, 2016

[↻](#) [🗨️](#) [👍](#) [👎](#) [📧](#) [🔗](#) [⋮](#)

# WHO LIVES HERE NOW?

## INCOME RANGE OF THE LIFEMODE SUMMARY GROUPS



Earl inspires and enables people to positively impact their future through a deeper, geographic understanding of the changing world around them.

Government, industry leaders, academics, and non-governmental organizations trust us to connect them with the analytic knowledge they need to make the critical decisions that shape the planet. For more than 43 years, Earl has cultivated collaborative relationships with partners that share our commitment to solving earth's most pressing challenges with geographic expertise and cultural nuance. Today, we believe that geography is at the heart of a more resilient and sustainable future. Creating responsible products and solutions drives our passion for improving quality of life everywhere.

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## TAPESTRY SEGMENTATION

The Fabric of America's Neighborhoods

Earl's Tapestry Market Segmentation is a geodemographic system that identifies 68 distinctive markets in the US based on socioeconomic and demographic characteristics to provide an accurate, comprehensive profile of US consumers.



## WHAT IS TAPESTRY?

- Tapestry Segmentation represents 25 years ago. The 68 regions are defined by their socioeconomic and demographic characteristics to allow you to profile consumers.
- Standard geographic areas include census tracts, block groups, and zip codes.
- Use defined areas such as retail catchment areas, or even your own business boundaries.
- Customer addresses or zip codes can be mapped to the nearest Tapestry Segmentation summary group for a broad geographic area.
- Use Tapestry Segmentation summary groups for a broad geographic area.
- Use Tapestry Segmentation summary groups for a broad geographic area.



# LifeMode Group: Ethnic Enclaves Barrios Urbanos

**Households:** 1,243,000

**Average Household Size:** 3.59

**Median Age:** 28.3

**Median Household Income:** \$36,000

## WHO ARE WE?

Family is central within these diverse communities. Hispanics make up more than 70% of the residents. More than one in four are foreign born, bringing rich cultural traditions to these neighborhoods in the urban outskirts. Dominating this market are younger families with children or single-parent households with multiple generations living under the same roof. These households balance their budgets carefully but also indulge in the latest trends and purchase with an eye to brands. Most workers are employed in skilled positions across the manufacturing, construction, or retail trade sectors.

## OUR NEIGHBORHOOD

- Family market; over a third of all households are married couples with children, with a number of multigenerational households and single-parent families; household size is higher at 3.59.
- While most residents live in single-family homes, almost 10% of householders reside in mobile home parks.
- Homes are owner occupied, with slightly higher monthly costs (Index 106) but fewer mortgages (Index 89).
- Most are older homes, more than 60% built from 1950 to 1989.
- Most households have one or two vehicles; many commuters car pool or walk to work (Index 152).
- *Barrios Urbanos* residents live within the urban periphery of larger metropolitan areas across the South and West.

## SOCIOECONOMIC TRAITS

- While a majority finished high school, over 40% have not (Index 303).
- Unemployment is higher at 12% (Index 135); labor force participation is slightly lower at 61%.
- Nearly one in four households is below the poverty level (Index 179).
- Residents balance their budgets carefully by spending only on necessities and limiting activities like dining out.
- Many have no financial investments or retirement savings, but they have their homes.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

# San Antonio Blended Psychographics

Established Families and  
Boomers



Young and Diverse  
Families



Millennials



Hardworking Households

## Established Families and Boomers



Baby Boomers (46-64) will constitute a senior population unprecedented in size. They will look for homes where they can age-in-place.

## Hardworking Households



These are disproportionately older and predominantly single family households with moderate education and lower paying jobs who are deeply connected to their communities.

## Millennials

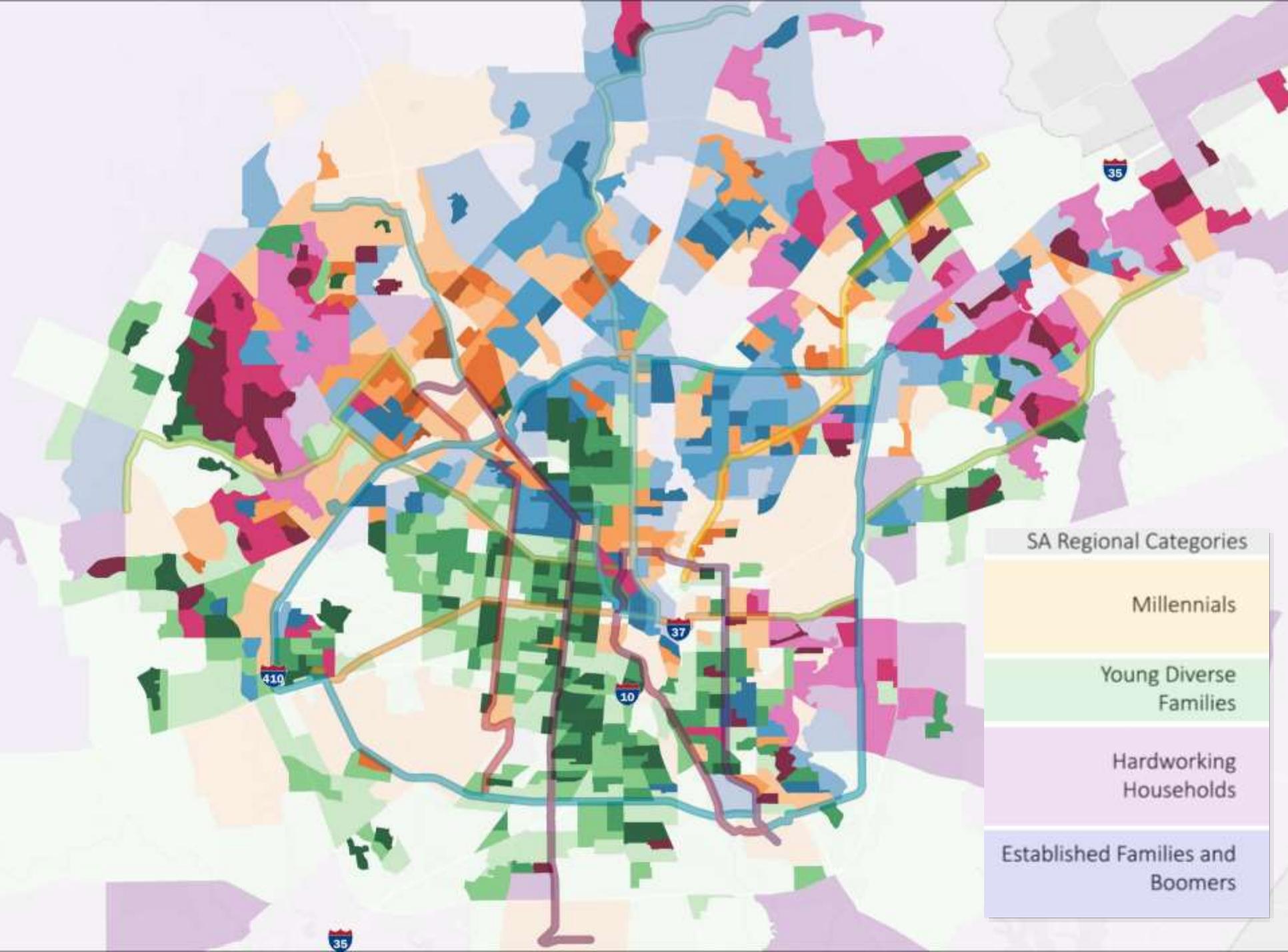


Millennials (Gen Y) may rent far longer than previous generations. They prefer walkable, urban neighborhoods.

## Young Diverse Families



San Antonio will continue to be a majority minority region. These households will seek homeownership and may be willing to move in order to achieve it.



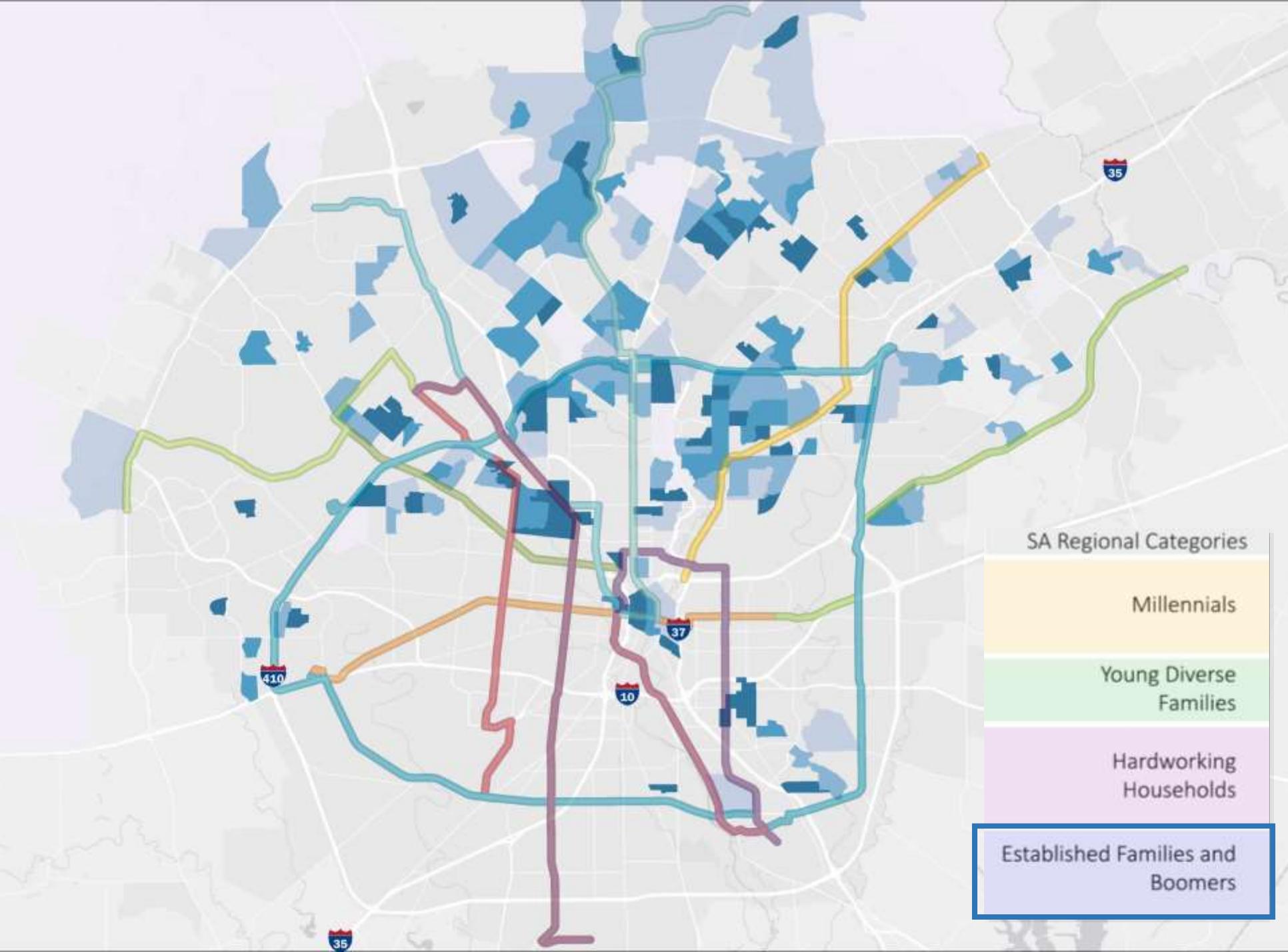
SA Regional Categories

Millennials

Young Diverse Families

Hardworking Households

Established Families and Boomers



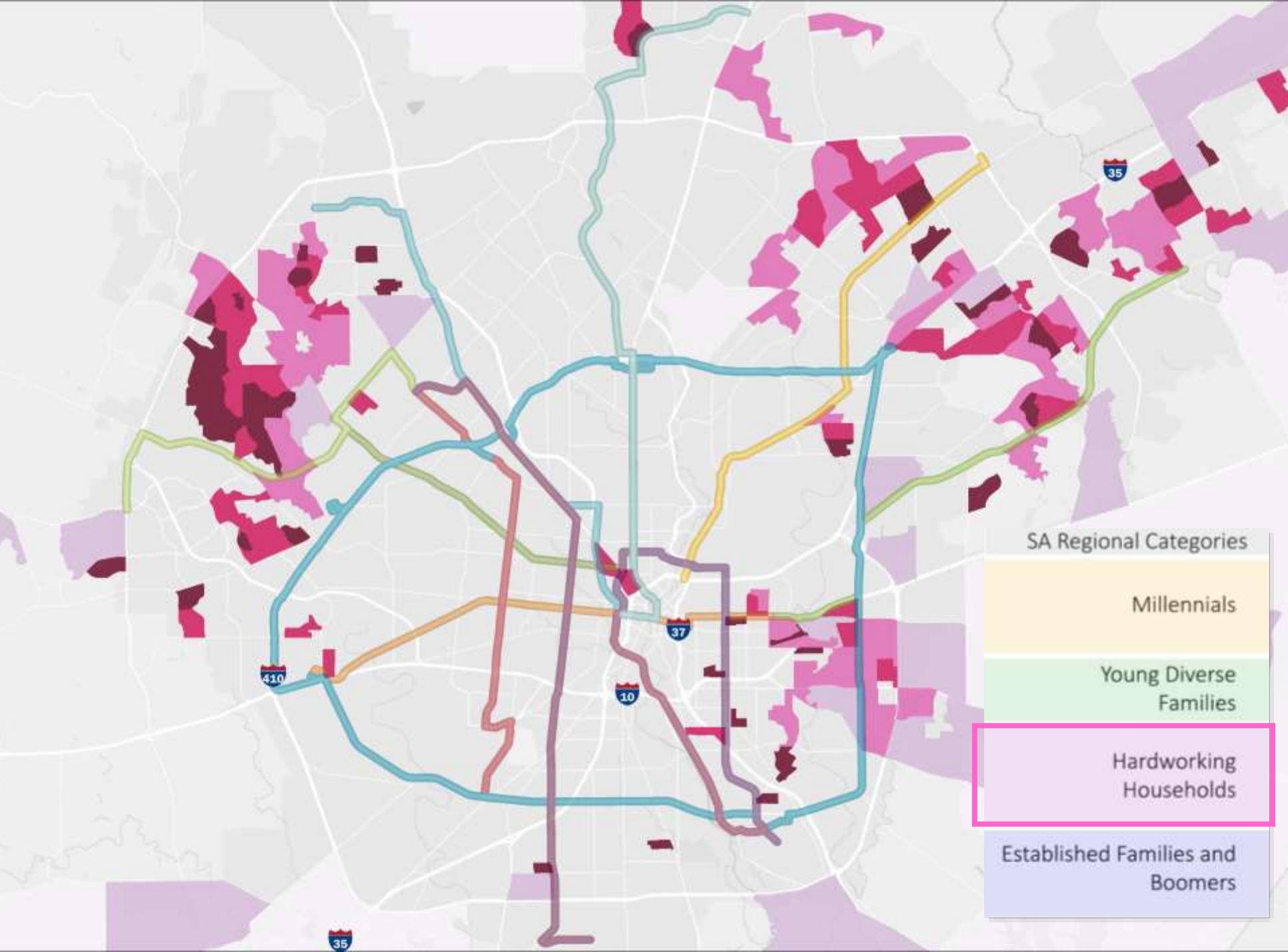
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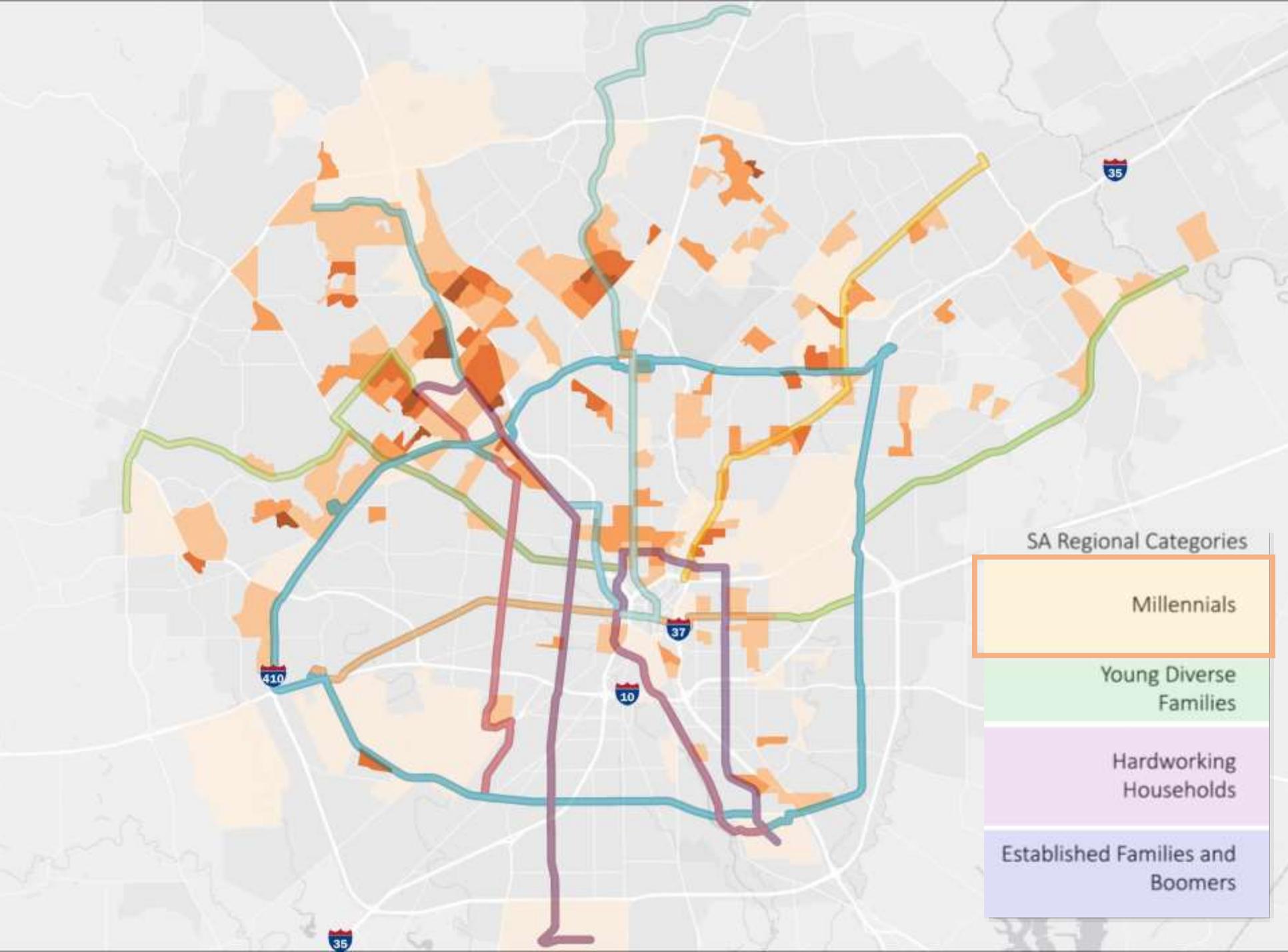
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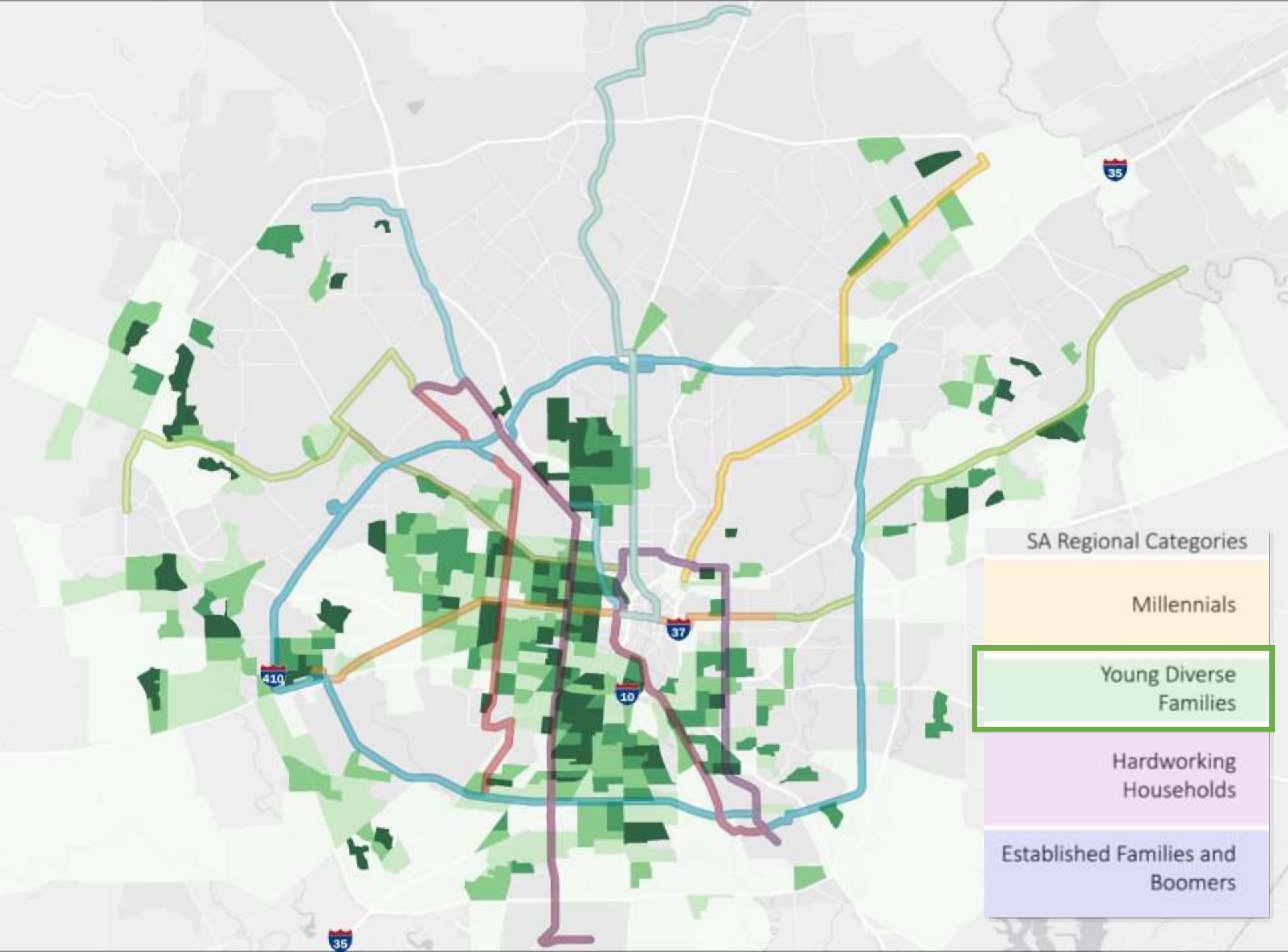
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SA Regional Categories

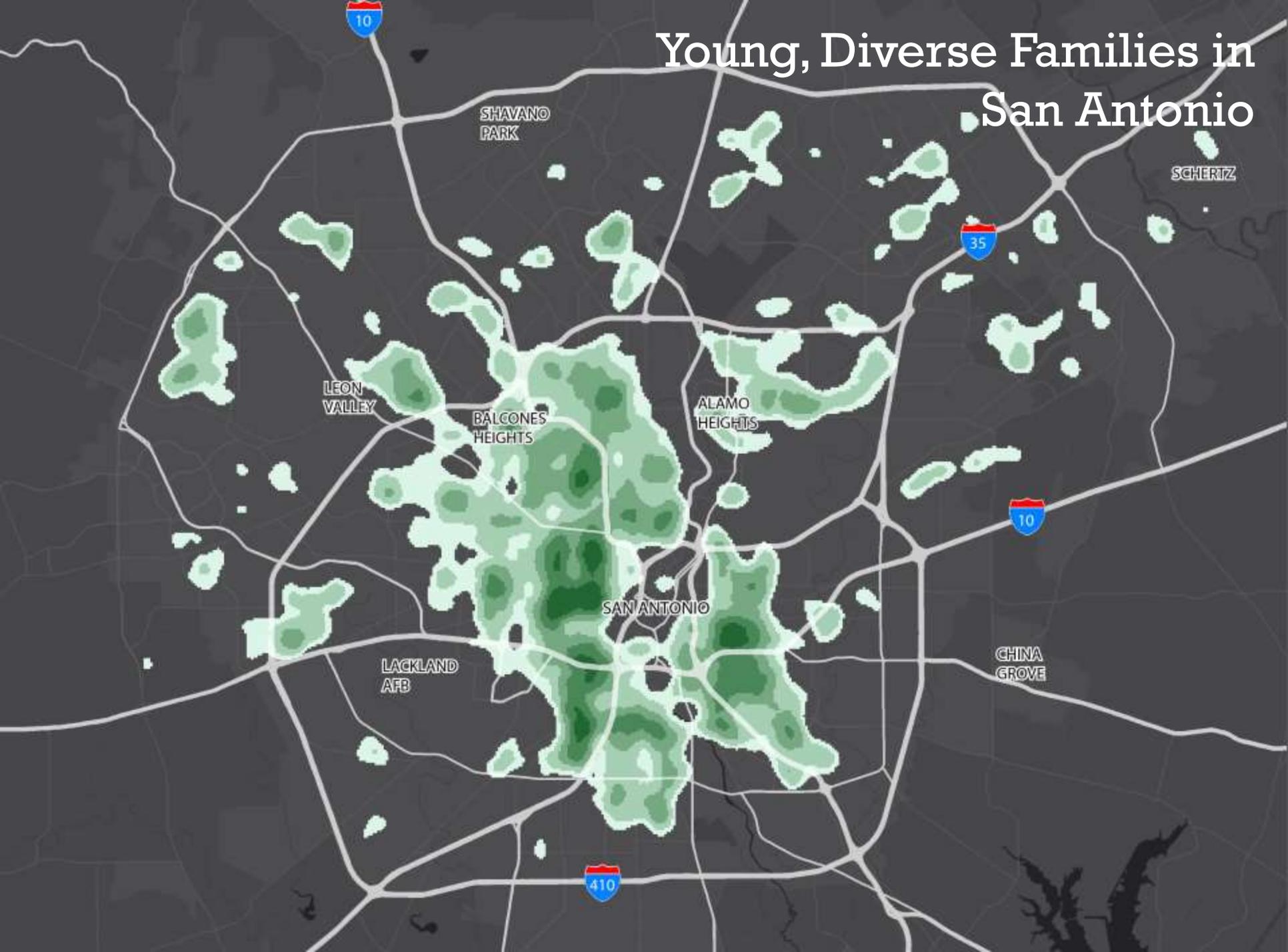
Millennials

Young Diverse Families

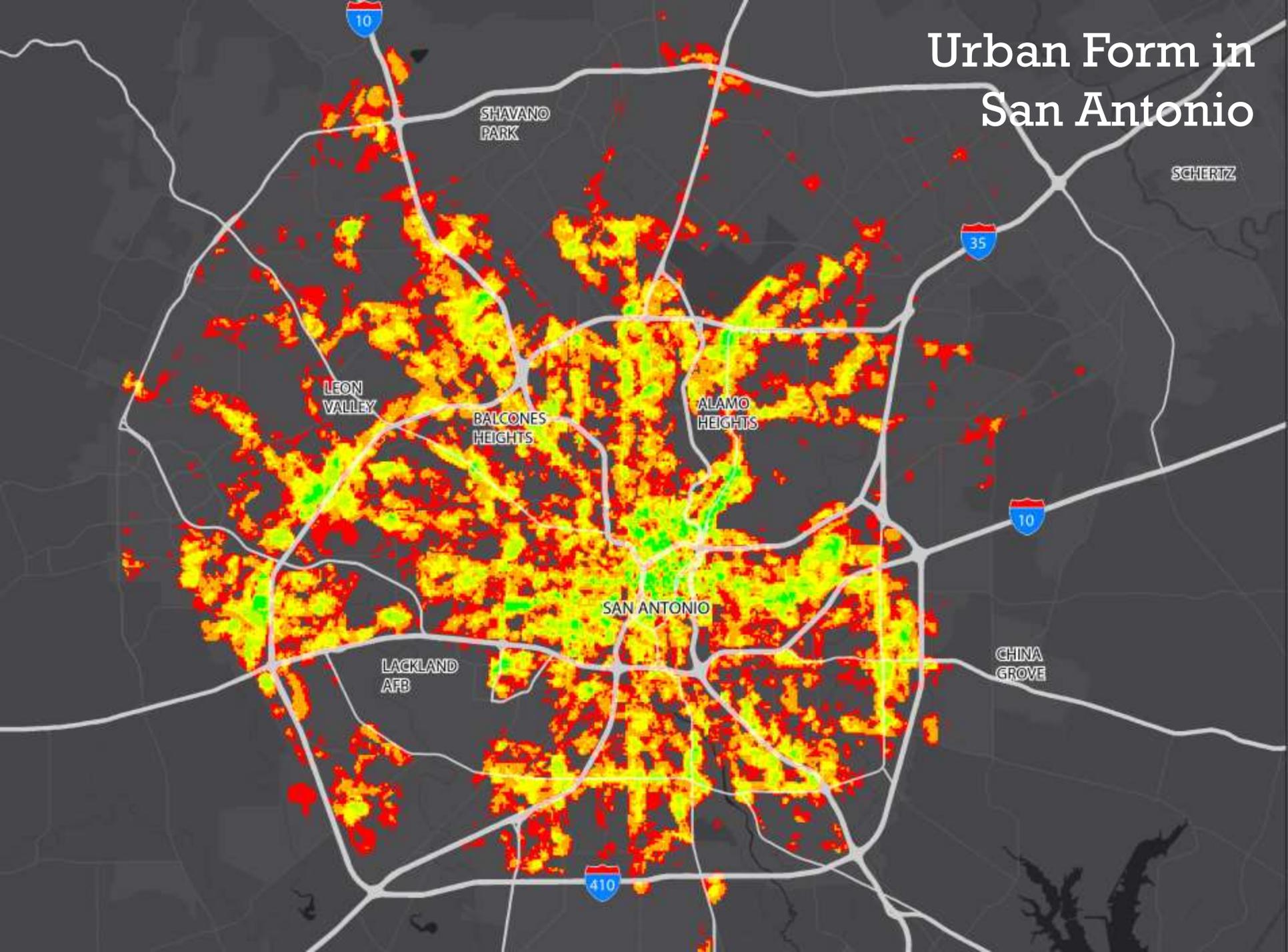
Hardworking Households

Established Families and Boomers

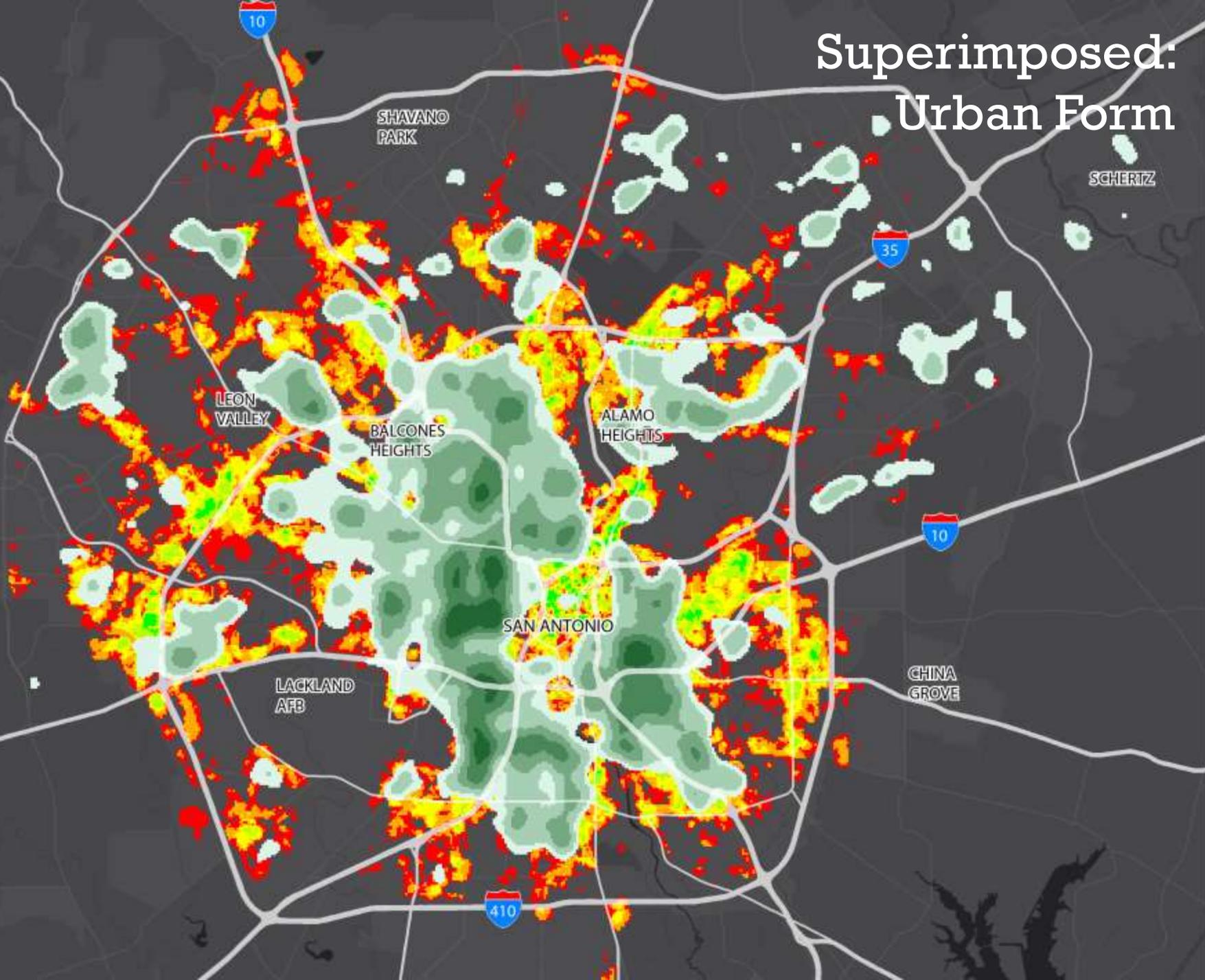
# Young, Diverse Families in San Antonio



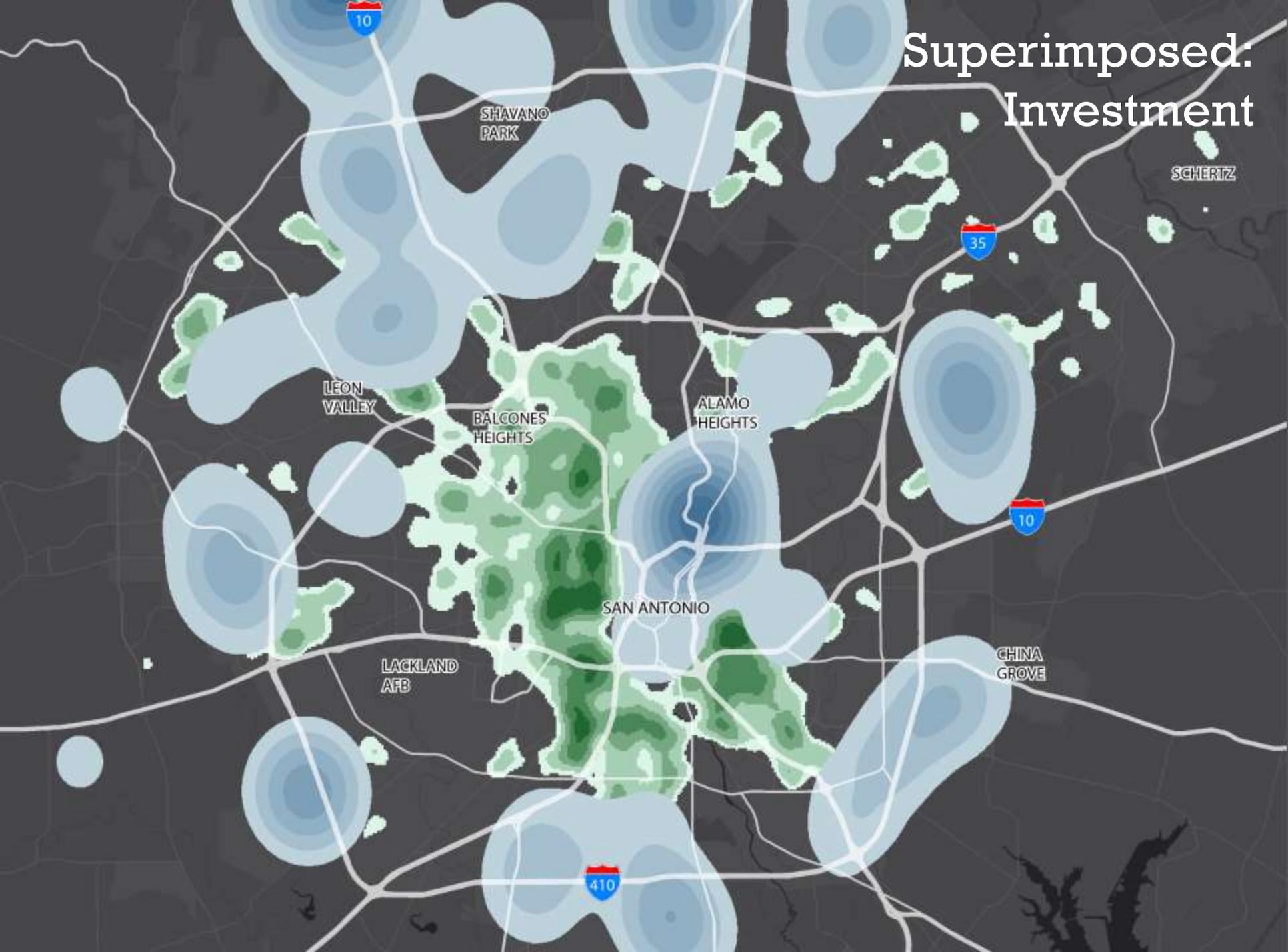
# Urban Form in San Antonio



# Superimposed: Urban Form



# Superimposed: Investment



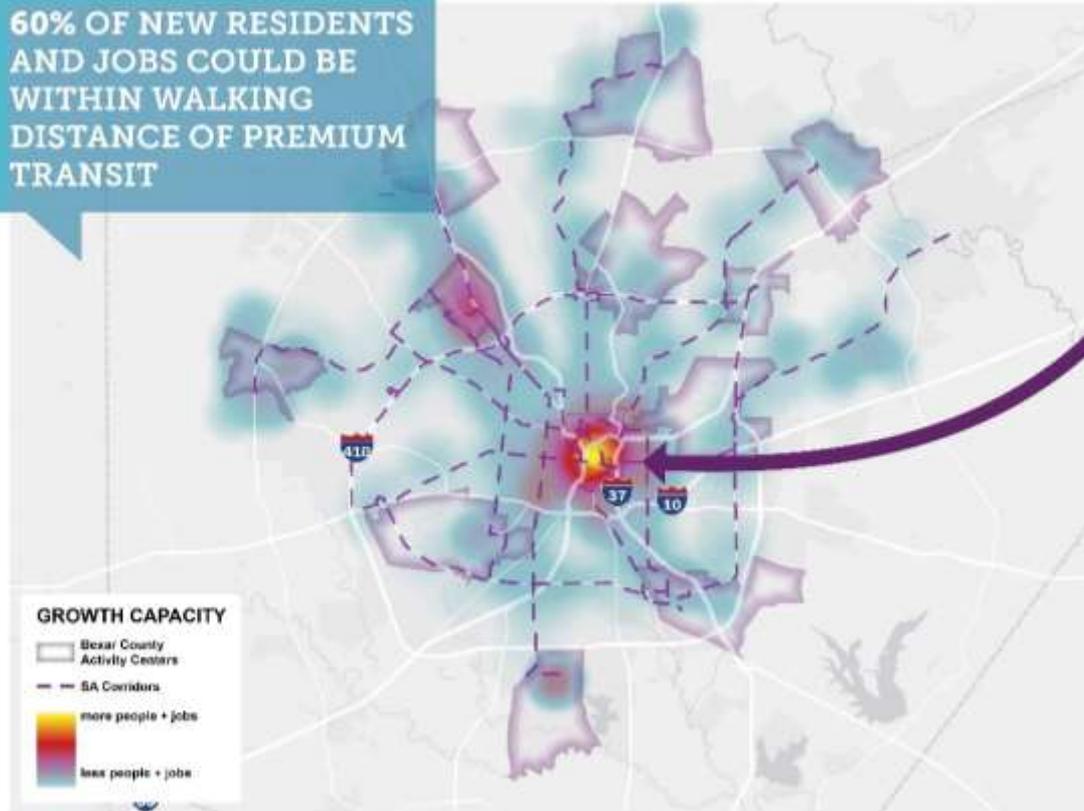
# Where are we headed?

- San Antonio has a lot of neighborhoods that could become **WalkUPs**.
- The resulting investments could make housing and commercial space more **expensive**.
- Residents of these neighborhoods may be vulnerable to **displacement**.

# SA CORRIDORS

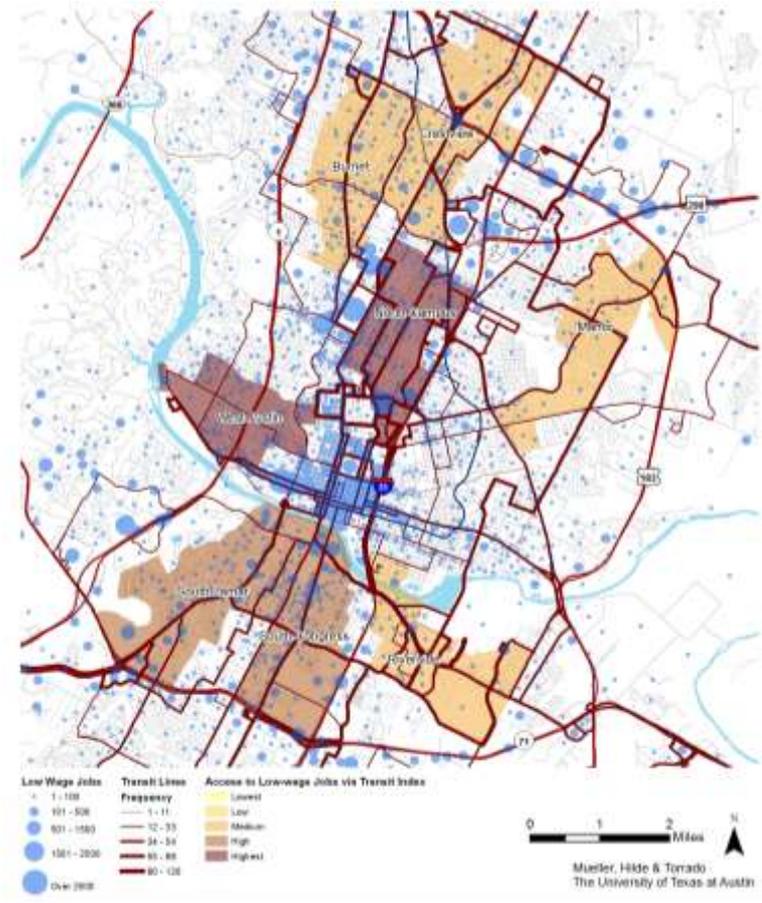
## GROWING NEAR PUBLIC TRANSIT

60% OF NEW RESIDENTS AND JOBS COULD BE WITHIN WALKING DISTANCE OF PREMIUM TRANSIT



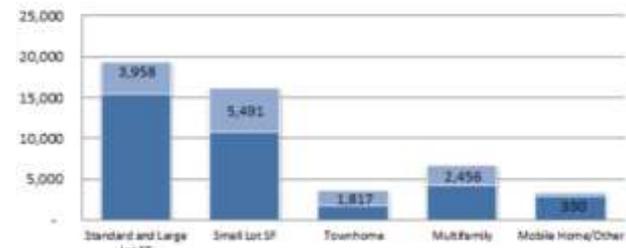
The SA Tomorrow Comprehensive Plan is our roadmap for the future. SA Corridors is the first step to making SA Tomorrow a reality.

# Tools to Target Policies



Transit Access to Low Wage Jobs	Affordable Housing Vulnerability	Development Pressure
6.1	3.5	9.3
9.9	8.0	1.8
8.0	6.0	5.4
2.8	1.5	6.4
8.5	10.0	4.6
8.4	6.9	4.0
3.4	3.2	0.4
6.0	4.4	4.9
10.0	7.1	9.6
6.5	6.2	10.0
5.9	4.4	9.9
4.5	6.7	7.6

## Future Balanced Housing Profile

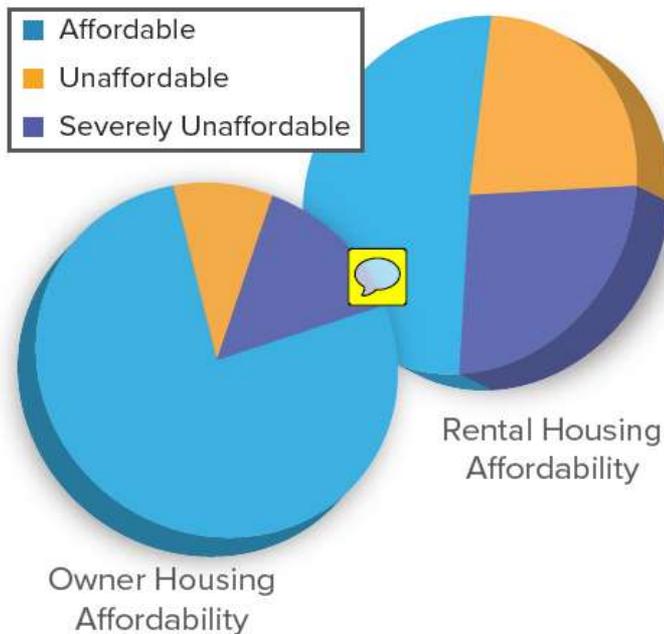


• Future Incremental Units (includes new units, rehabbed vacant units, and vacancy (2010-2035))

• Occupied Housing Supply (2010)

# Setting Housing Targets

**23% & 49%**  
of owners & of renters  
are living in housing that is  
unaffordable given their income.

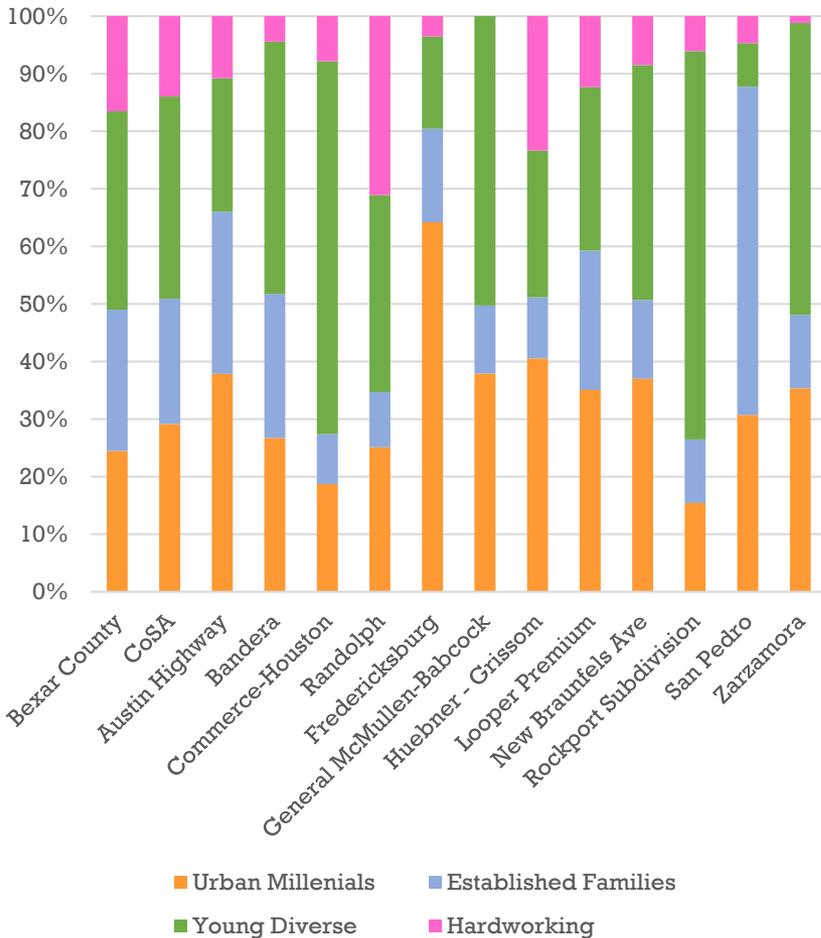


4-COUNTY SA REGIONAL HOUSING TARGETS BY TYPE		
Housing Type	2040 Target (Units added)	Annual Target
 Standard Large Lot	251,102	10,044
 Small Lot	236,512	9,460
 Townhome	108,644	4,346
 Multifamily	203,736	8,149
 Mobile Home/Other	14,322	573
<b>TOTAL</b>	<b>814,316</b>	<b>32,572</b>

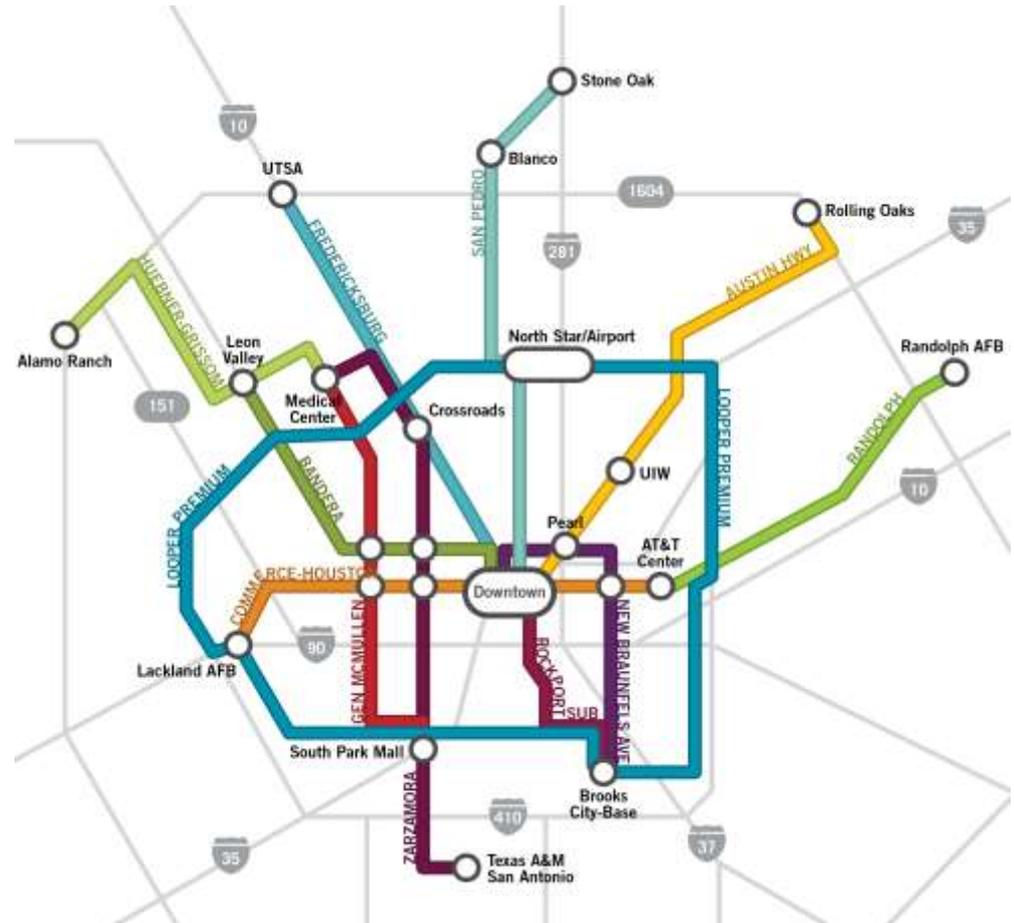
Source: Evison Tomorrow Balanced Housing Model, U.S. Census ACS 2010-2014.

# Psychographics

## Corridor Psychographics



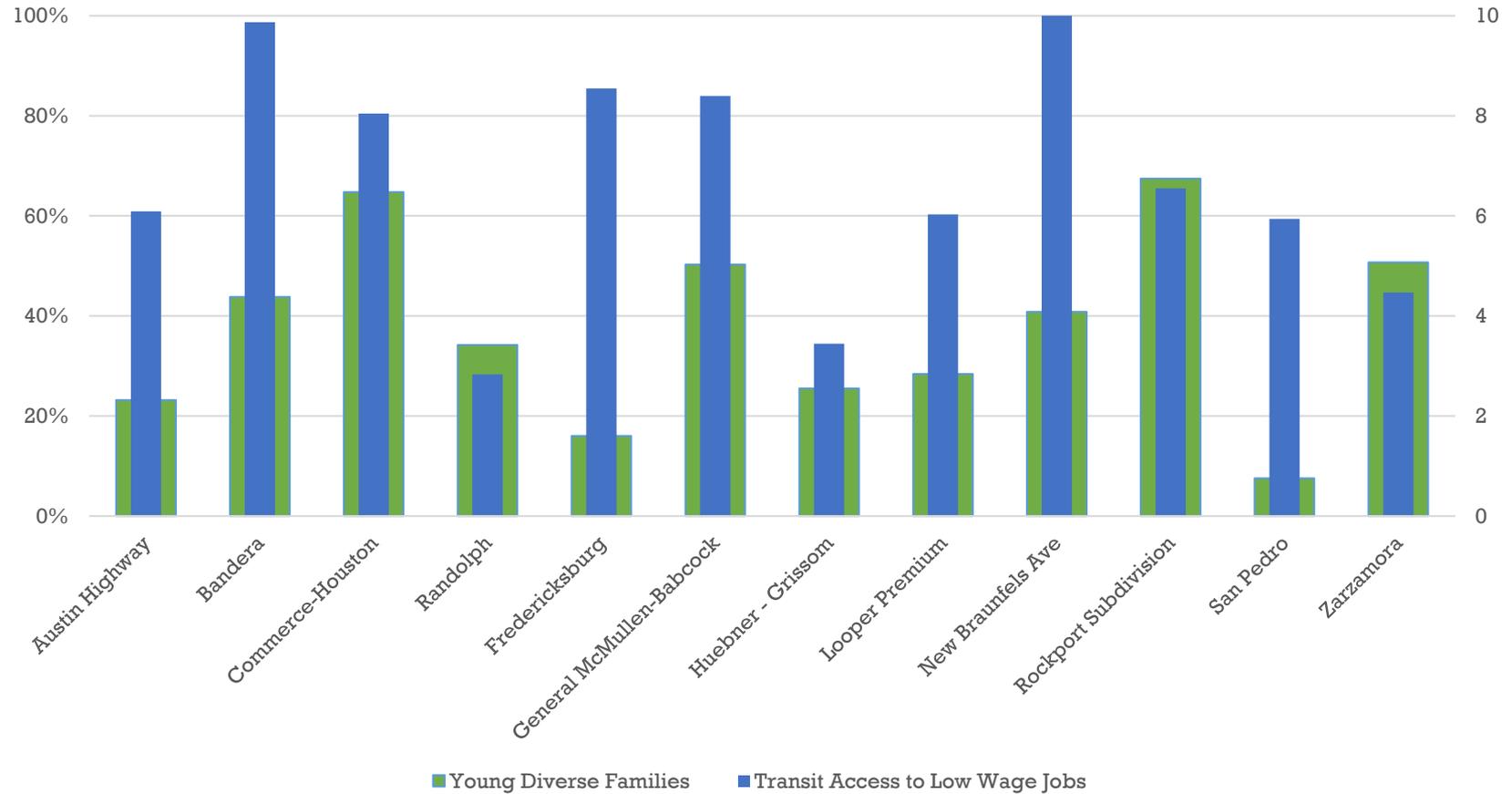
## VIA Vision 2040 Routes



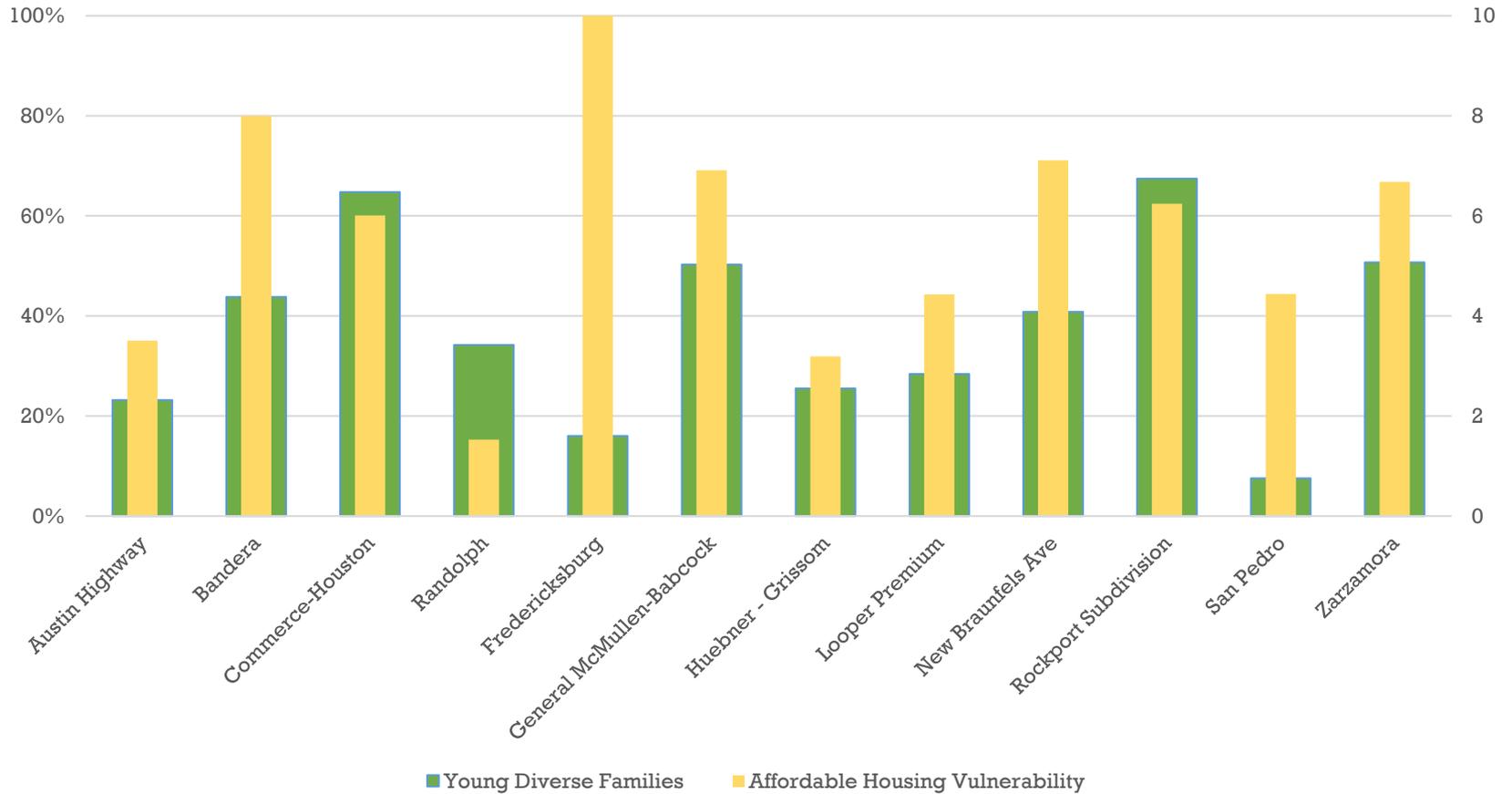
# The Corridor Housing Preservation Index: A new tool for equitable corridor planning



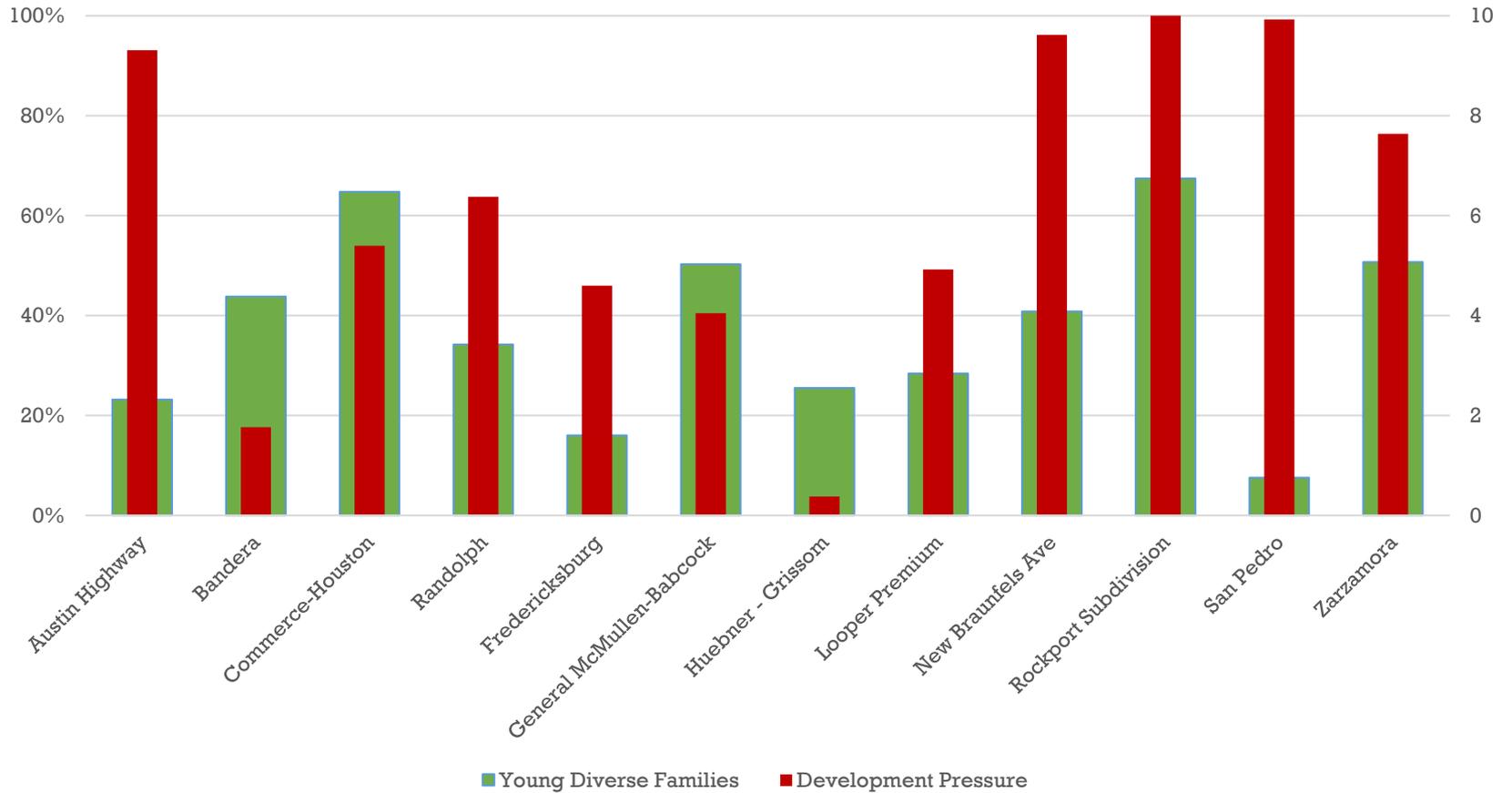
# Transit Access to Low Wage Jobs



# Affordable Housing Vulnerability

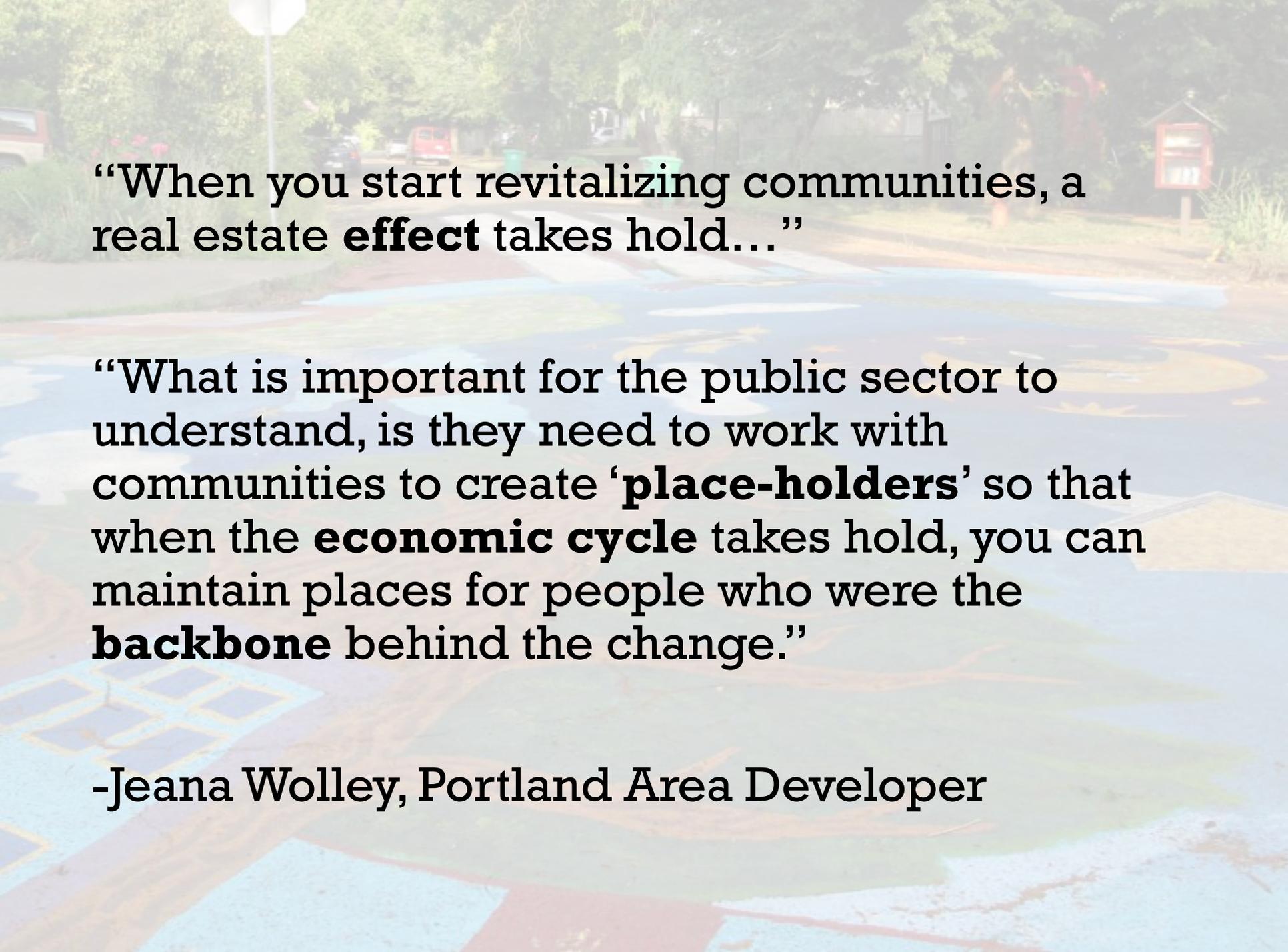


# Development Pressure



# What can we do?

- The City and VIA are planning for **equitable** growth around transit.
- As we make big capital investments, we should be conscious of the real estate **impacts**.
- We can use analytical tools to understand, track, and target our efforts for the greatest benefit to **vulnerable residents**.



“When you start revitalizing communities, a real estate **effect** takes hold...”

“What is important for the public sector to understand, is they need to work with communities to create ‘**place-holders**’ so that when the **economic cycle** takes hold, you can maintain places for people who were the **backbone** behind the change.”

-Jeana Wolley, Portland Area Developer