

Insights:

AARO's 2024 Austin-San Antonio Leaders Survey

October 14, 2024

Engagement Purpose

To gain a deeper understanding of the opportunities and challenges facing the Austin–San Antonio super-region as it continues to grow and develop through the year 2050

What were our research questions?

- What are leaders' top priorities among regional challenges?
- Where do leaders see the need for super-regional solutions?
- What do leaders view as missing ingredients to solving challenges?
- Are there shared and/or unique values among super-regional leaders?
- What strategic solutions do leaders identify that address regional challenges?

Table of Contents

- 02 Review of Purpose
- 04 Survey Overview
- 10 City Characteristics
- 17 Public Policy
- 45 Civic Engagement
- 48 Super-Regional Collaboration
- 55 Main Headlines
- 60 Methodology

Survey Overview

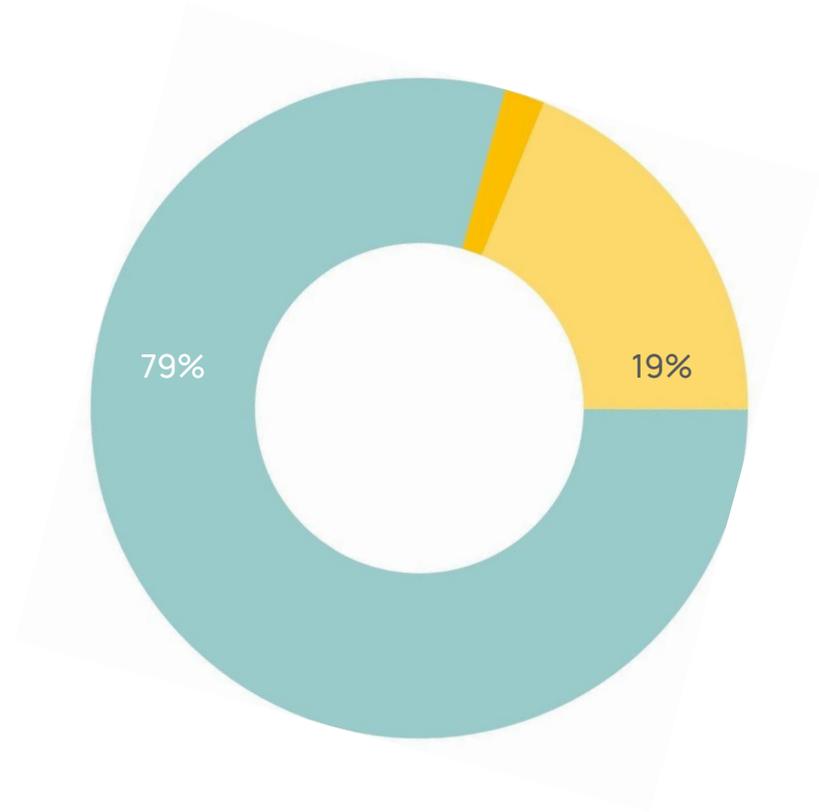
Who are our regional leaders?

30.3% of the survey population, or 355 leaders, participated in the 2024 Austin–San Antonio Leaders Survey.

Place of Residence

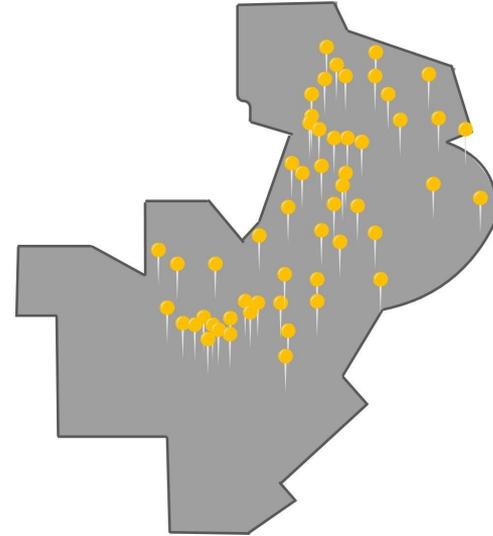
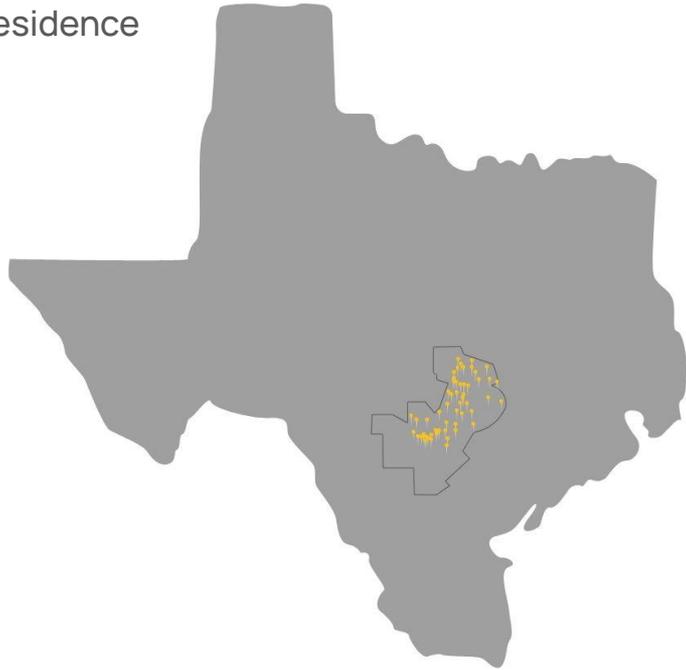
N=355

- Austin–Round Rock–San Marcos Metropolitan Statistical Area
- San Antonio–New Braunfels Metropolitan Statistical Area
- Other



55 cities in the Austin–San Antonio super-region are represented in this survey.

City of Residence
N=337

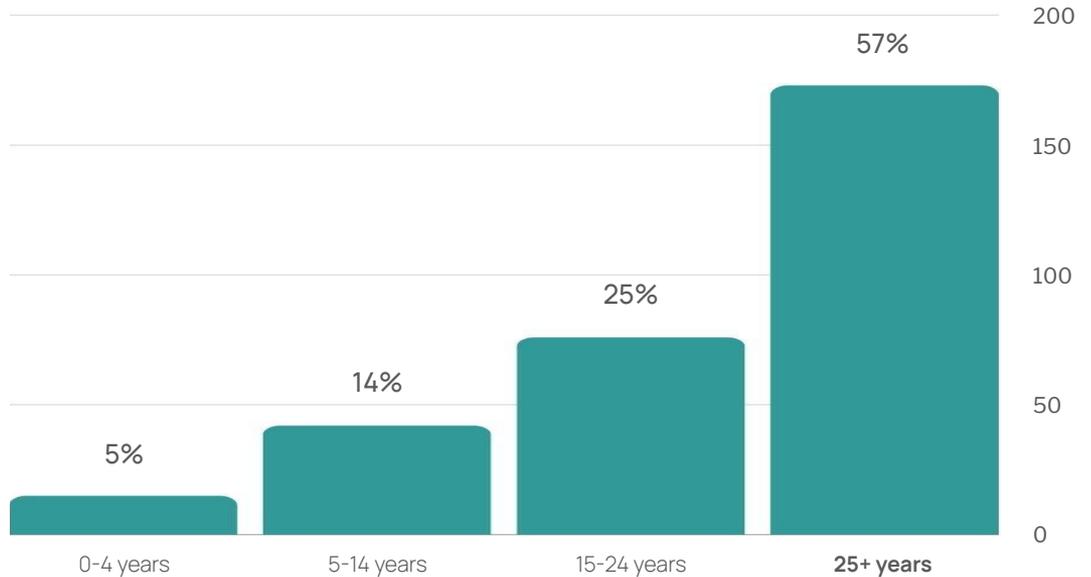


Over half of respondents are long time residents who have lived in the region for over 25 years.

Term of Residence

N=306

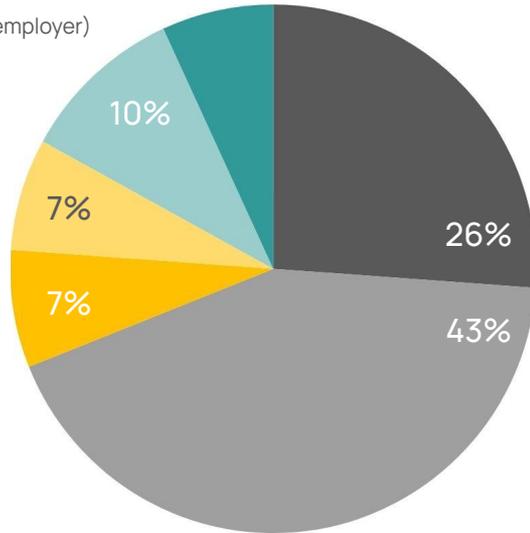
■ Total leaders



More than 2 in 3 respondents work in the nonprofit or private sectors; more than 1 in 3 is a Democrat.

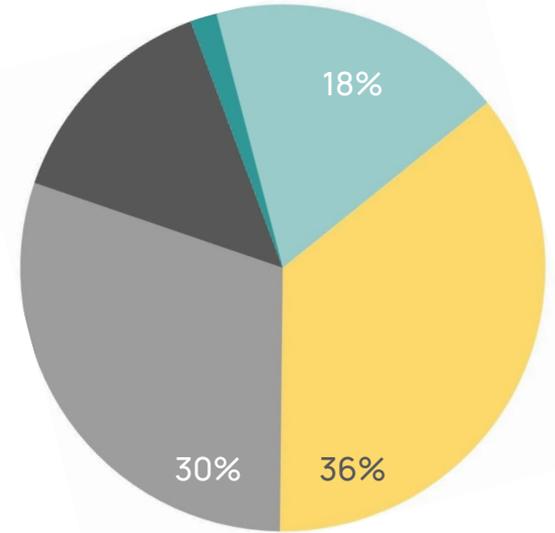
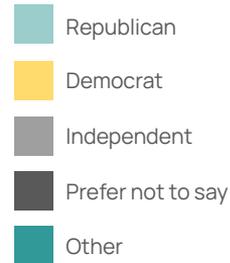
Occupation

N=306



Political Affiliation

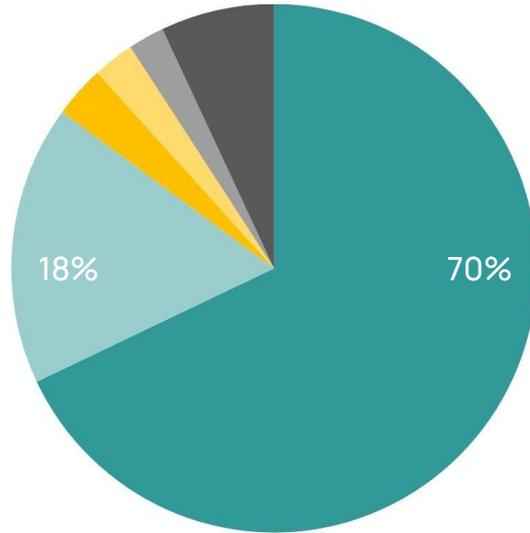
N=306



More than half of regional leaders that responded to this survey are men, 7 in 10 are white.

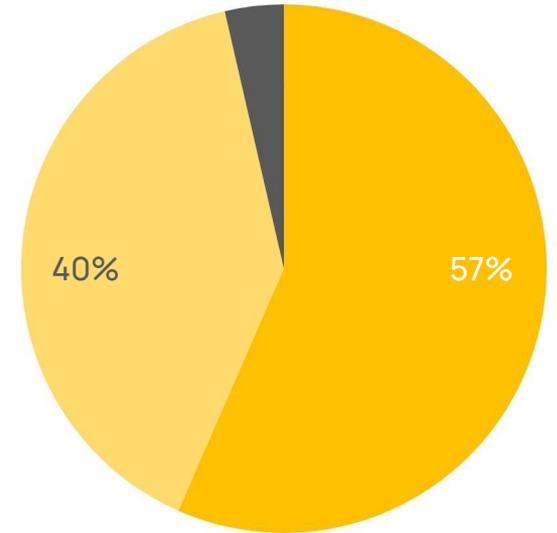
Race and Ethnicity

N=305



Gender Identity

N=304



City Characteristics

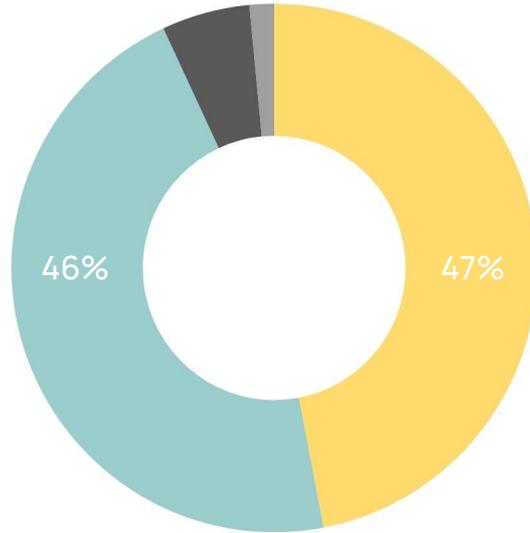
How do regional leaders feel about their cities?

9 in 10 leaders feel good about their city and are likely to recommend it to someone looking to relocate.

Generally speaking, how do you feel about your city?

N=332

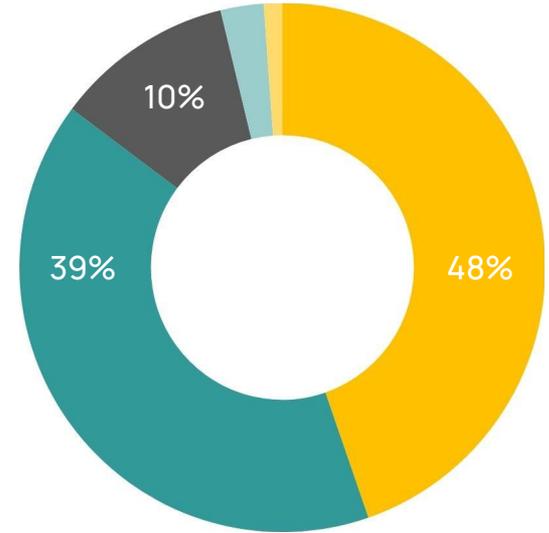
- Very positive
- Positive
- Neutral
- Negative
- Very negative



How likely are you to recommend your city?

N=332

- Very likely
- Likely
- Neutral
- Unlikely
- Very unlikely

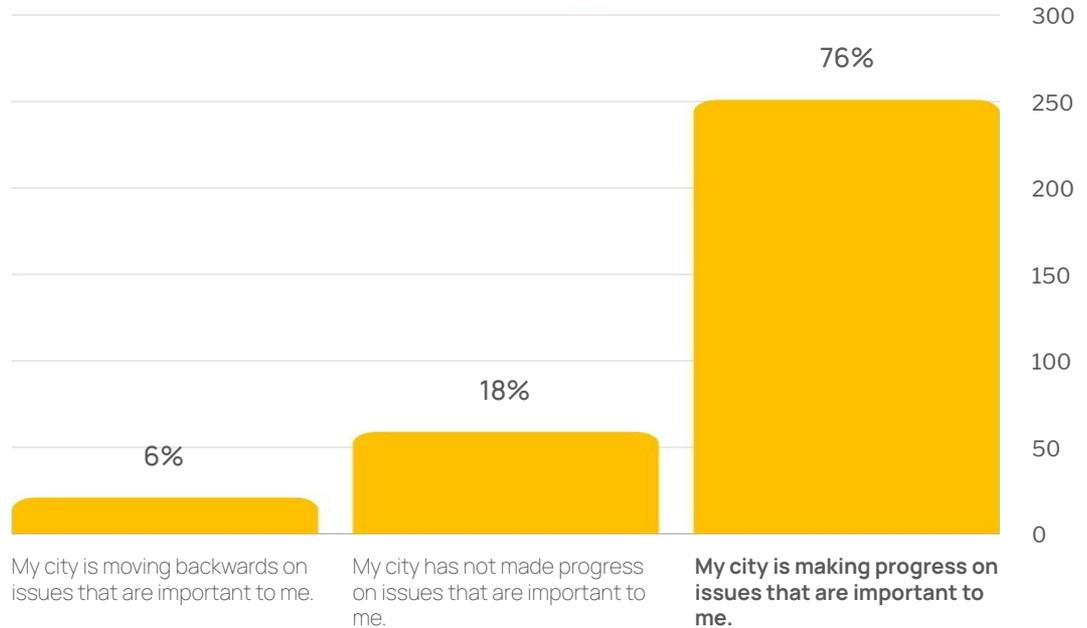


3 in 4 leaders feel their city is making progress on important issues.

Considering recent projects, policies, and news, which of the following statements best aligns with your opinion about the city you live in?

N=331

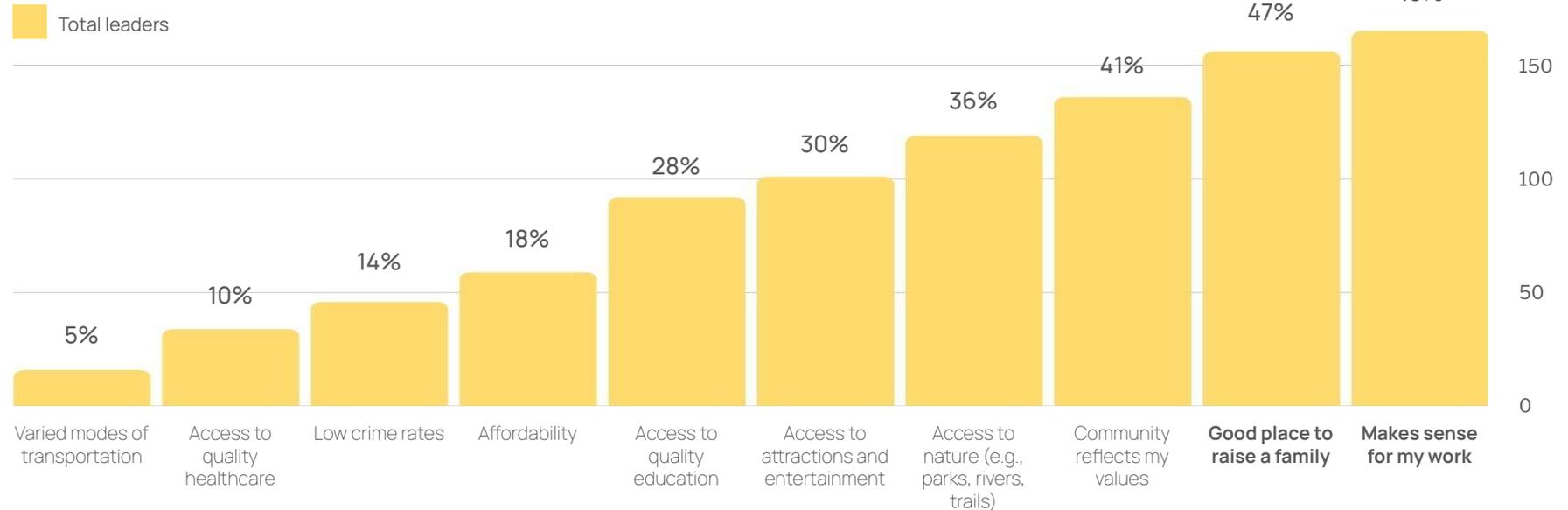
 Total leaders



Nearly half of leaders choose to live in their city because it works for their job and family.

Why do you choose to live in your city? Select your top 3 reasons.

N=334



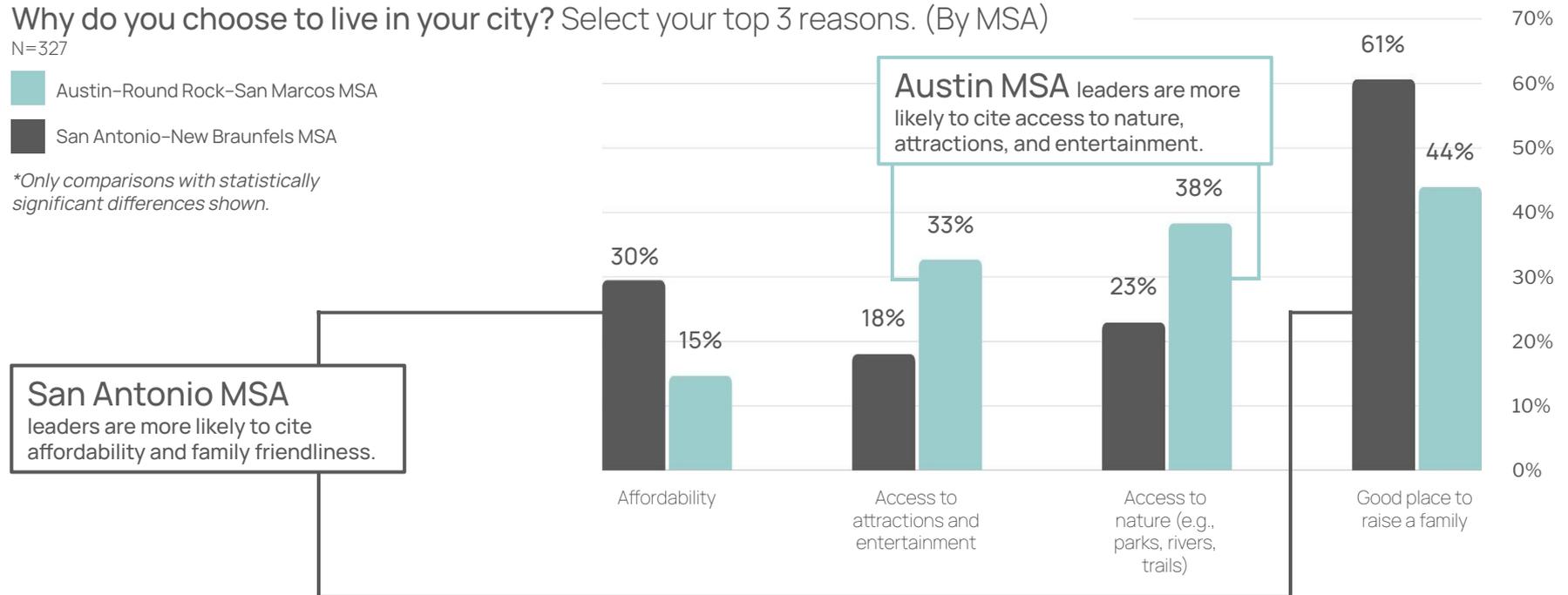
Regional leaders highlight some differences in why they choose their city.

Why do you choose to live in your city? Select your top 3 reasons. (By MSA)

N=327

- Austin–Round Rock–San Marcos MSA
- San Antonio–New Braunfels MSA

**Only comparisons with statistically significant differences shown.*

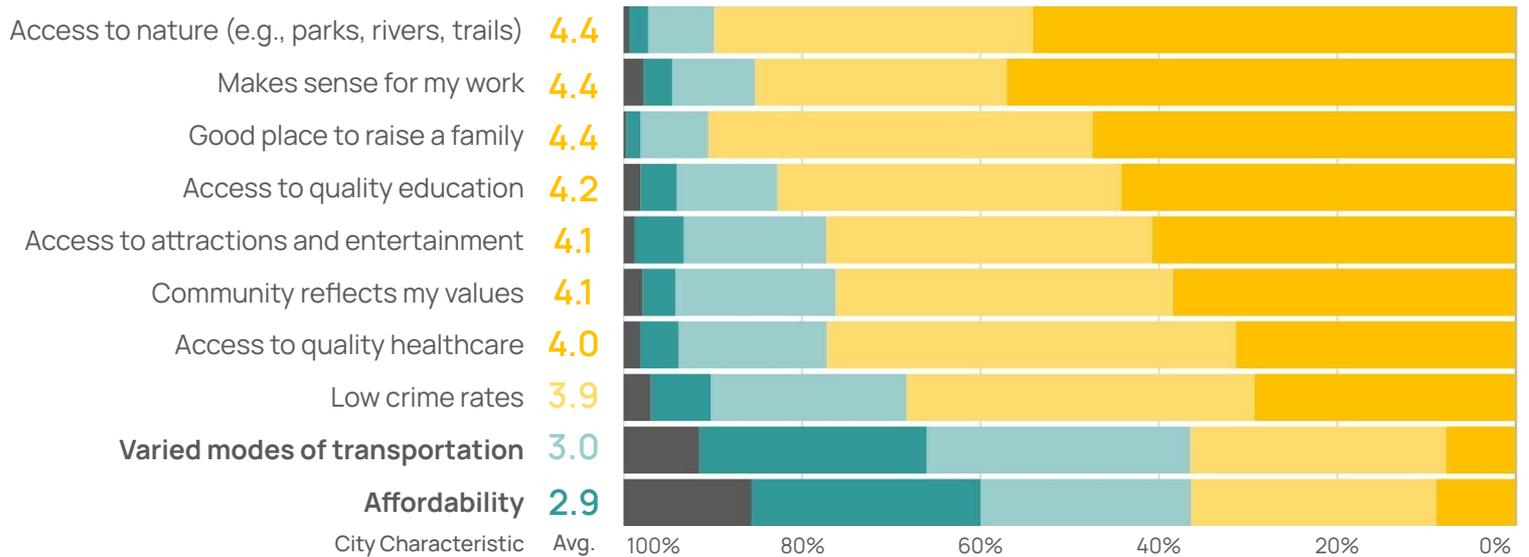


From 1 to 5, leaders rate most city criteria highly, but affordability & transportation lag.

How would you rate the following characteristics of your city?

N=332

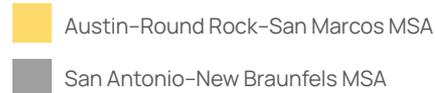
- 1- Very poor
- 2- Poor
- 3- Neutral
- 4- Good
- 5- Very good



San Antonio MSA leads in affordability and family friendly ratings, but trails Austin MSA in access to amenities.

How would you rate the following characteristics of your city? (By MSA)

N=325



**Only comparisons with statistically significant differences shown.*

San Antonio MSA
leaders are more likely to rate family friendliness and affordability highly.



Austin MSA leaders are more likely to rate access to attractions and entertainment, nature, and healthcare highly.



Public Policy

How do regional leaders feel about key policy issues in their cities?

This section focuses on 4 categories of public policy, each containing several issues relevant to the super-region.

- 01 Education and Workforce
 - 02 Infrastructure
 - 03 Quality of Life
 - 04 Social Services
- 

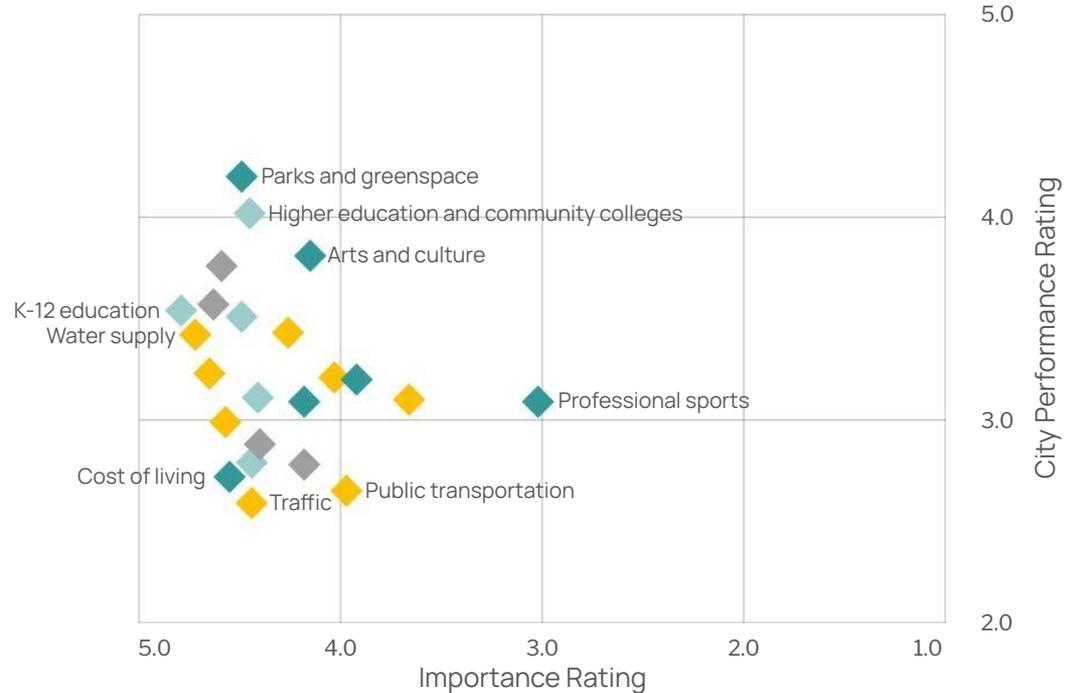
For each of the issues within these 4 categories, we asked leaders to rate its importance to their city, as well as their city's performance. In some cases, the survey yielded different results for Austin and San Antonio MSAs.

On average, leaders rated most issues highly important, but cities' infrastructure, social service performance ratings lag.

Performance Rating vs. Importance Rating, All Public Policy Issues

N=322

- Education and workforce issues
- Infrastructure issues
- Quality of life issues
- Social service issues



Public Policy

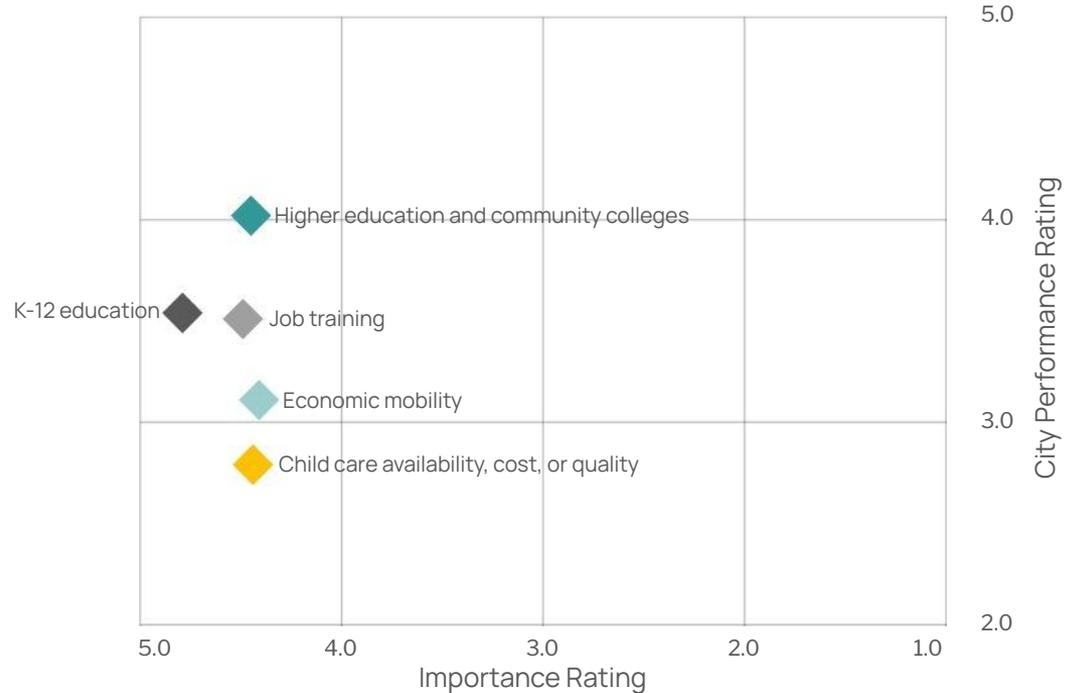
- 01 Education and Workforce
- 02 Infrastructure
- 03 Quality of Life
- 04 Social Services

Leaders think education and workforce issues are important, but cities' economic mobility, child care performances trail.

Performance Rating vs. Importance Rating,
Education and Workforce Issues

N=322

- K-12 education
- Job training
- Higher education and community colleges
- Economic mobility
- Child care availability, cost, or quality

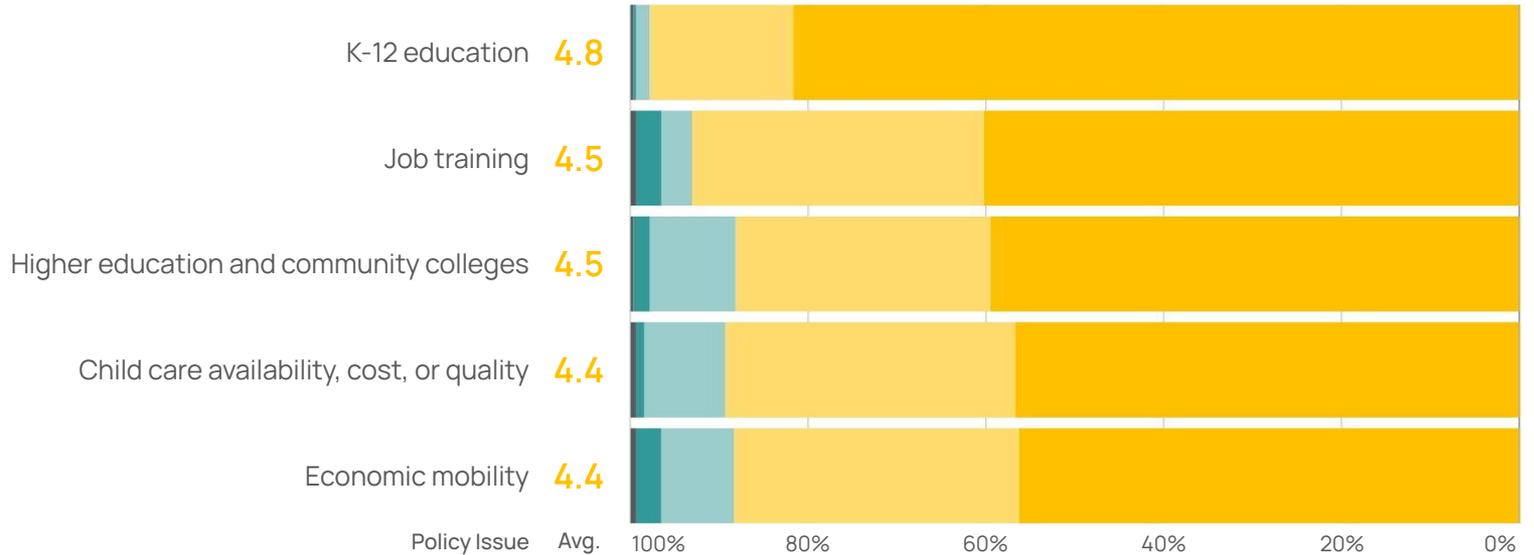


Importance: 90% of super-regional leaders agreed education and workforce development issues are important in their city.

How important are the following workforce and education issues in your city?

N=322

- 1- Very unimportant
- 2- Unimportant
- 3- Neutral
- 4- Important
- 5- Very important

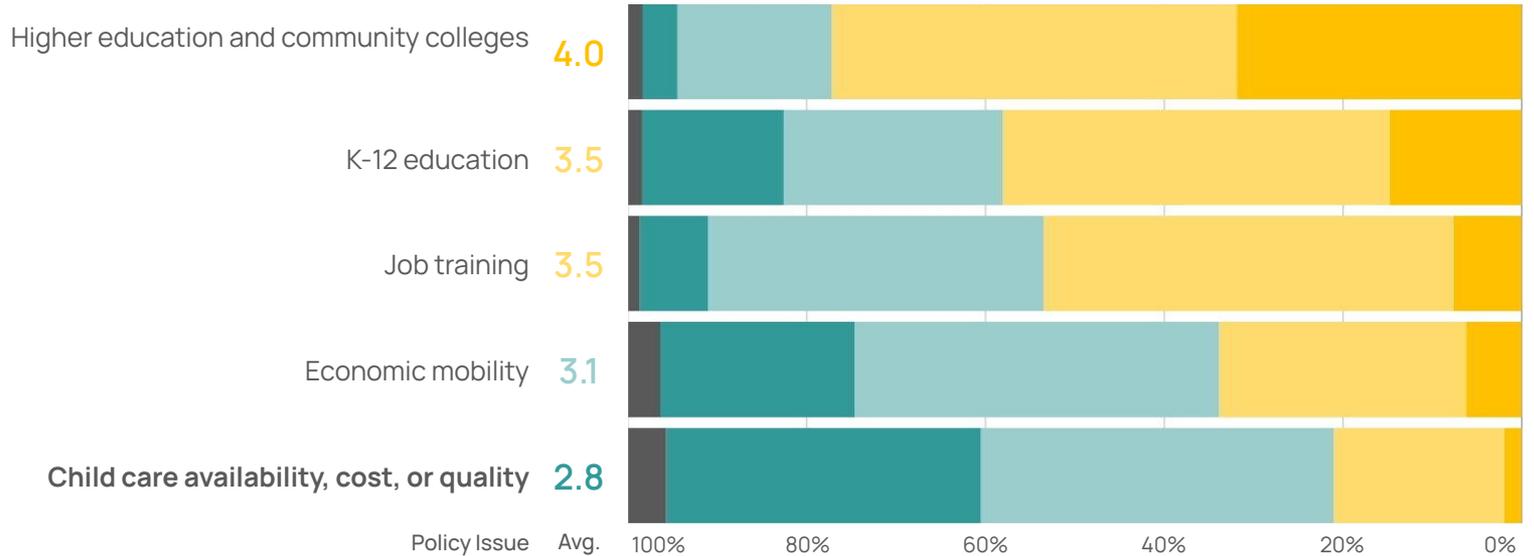


Performance: But nearly 40% of leaders believe their city underperforms in child care.

How well is your city performing on the following education and workforce issues?

N=315

- 1- Very poor
- 2- Poor
- 3- Neutral
- 4- Well
- 5- Very well



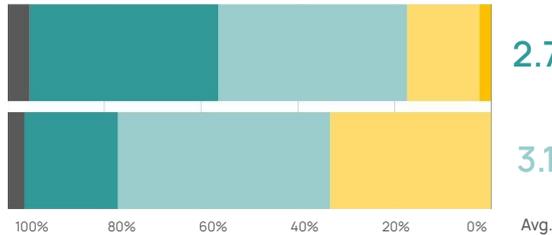
San Antonio MSA leaders are more likely than Austin leaders to say their city is doing well in child care and economic mobility.

How well is your city performing on the following education and workforce issues? (By MSA)

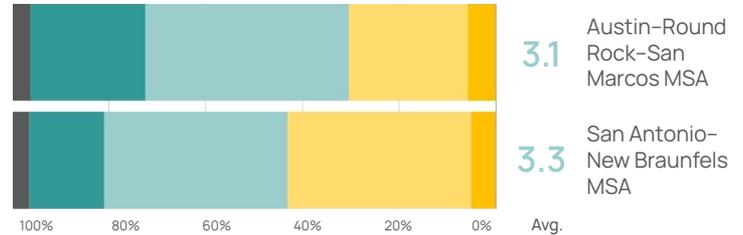
N=308

- 1- Very poor
- 2- Poor
- 3- Neutral
- 4- Well
- 5- Very well

Child care availability, cost, or quality



Economic mobility



**Only comparisons with statistically significant differences shown.*

Public Policy

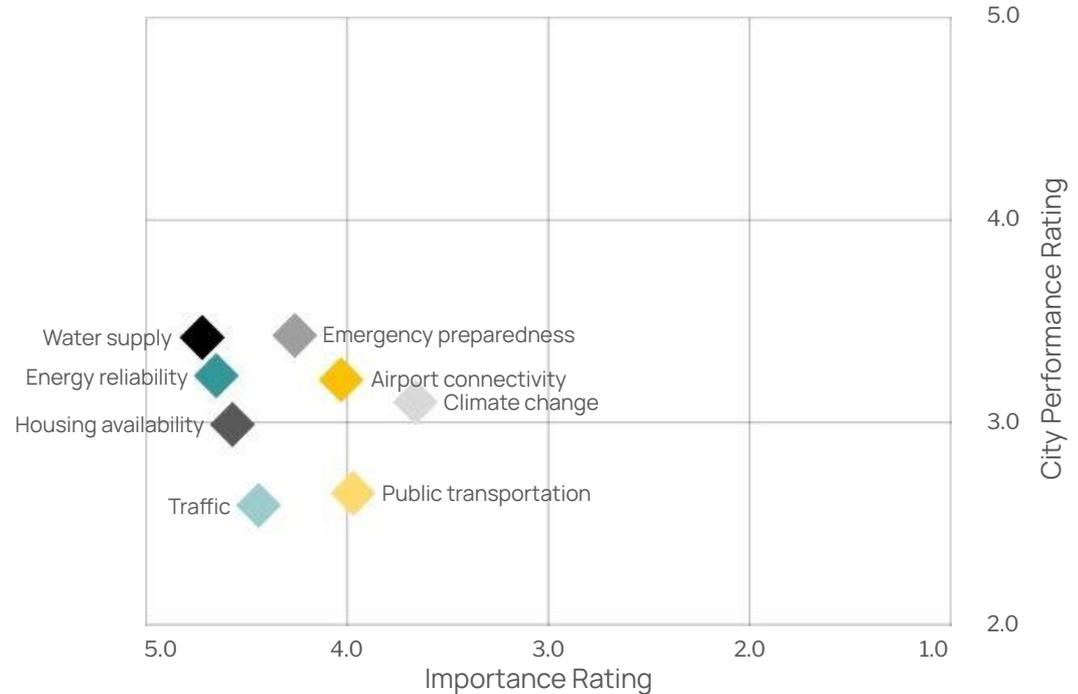
- 01 Education and Workforce
- 02 Infrastructure
- 03 Quality of Life
- 04 Social Services

Leaders give most infrastructure issues very high importance scores, but all performance scores fall below 3.5 out of 5.

Performance Rating vs. Importance Rating,
Infrastructure Issues

N=322

- Water supply
- Housing availability
- Emergency preparedness
- Climate change
- Traffic
- Energy reliability
- Airport connectivity
- Public transportation

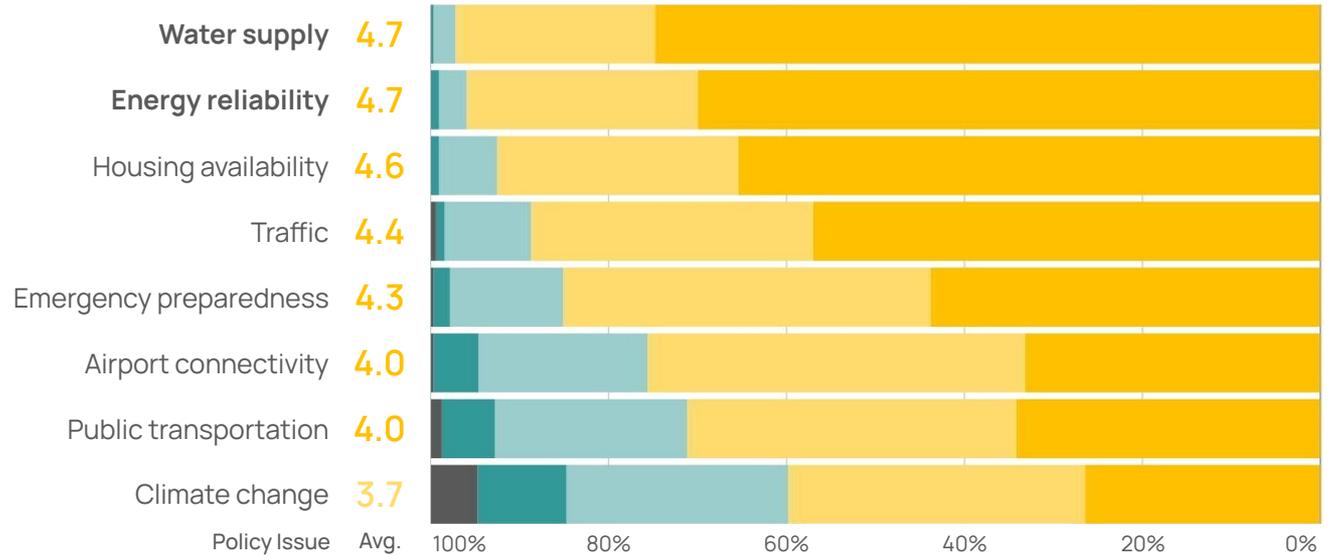


Importance: Leaders named water and energy the most important infrastructure issues in their cities.

How important are the following infrastructure issues in your city?

N=322

- 1- Very unimportant
- 2- Unimportant
- 3- Neutral
- 4- Important
- 5- Very important

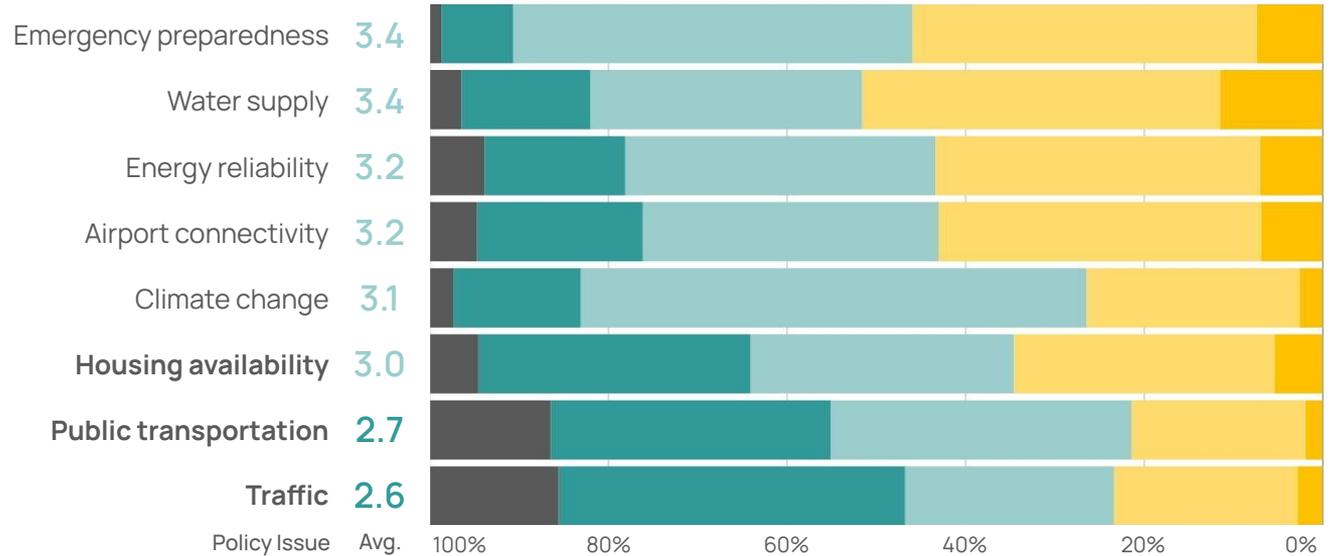


Performance: Traffic, public transportation, and housing availability rank lowest in city performance.

How well is your city performing on the following infrastructure issues?

N=315

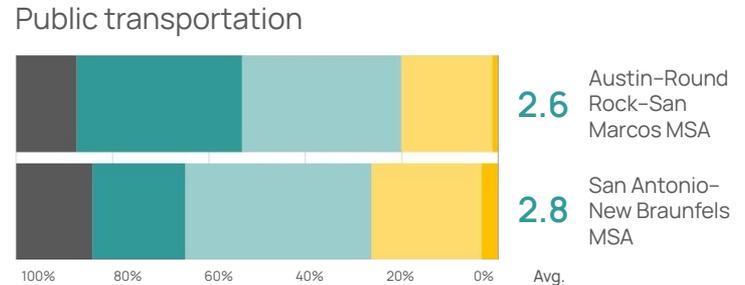
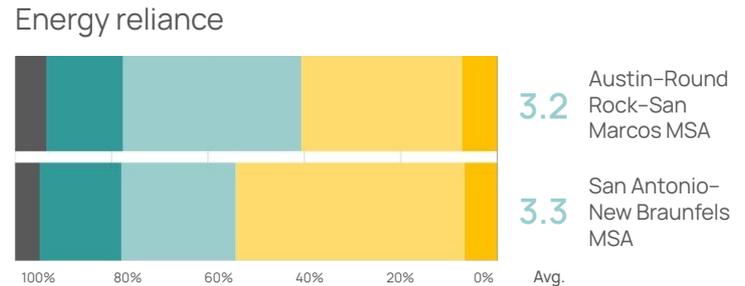
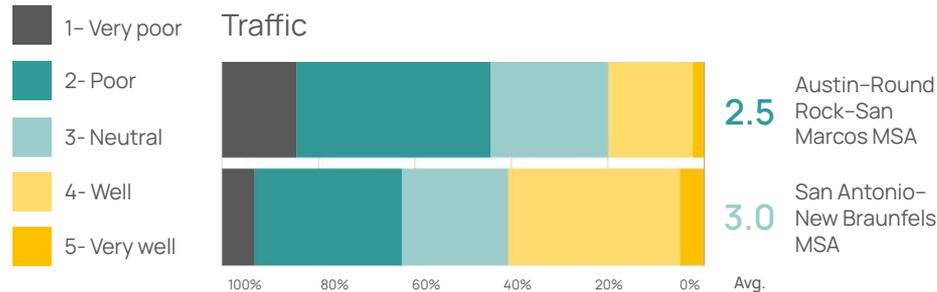
- 1- Very poor
- 2- Poor
- 3- Neutral
- 4- Well
- 5- Very well



San Antonio MSA ratings of cities' infrastructure performances are generally higher than Austin MSA ratings.

How well is your city performing on the following infrastructure issues? (By MSA)

N=308

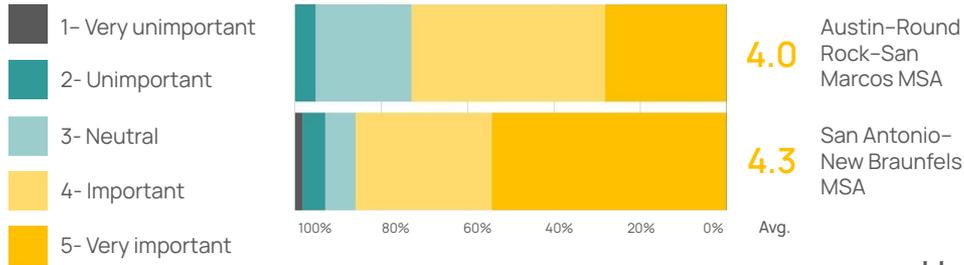


*Only comparisons with statistically significant differences shown.

Airport connectivity is a key infrastructure issue for San Antonio MSA leaders.

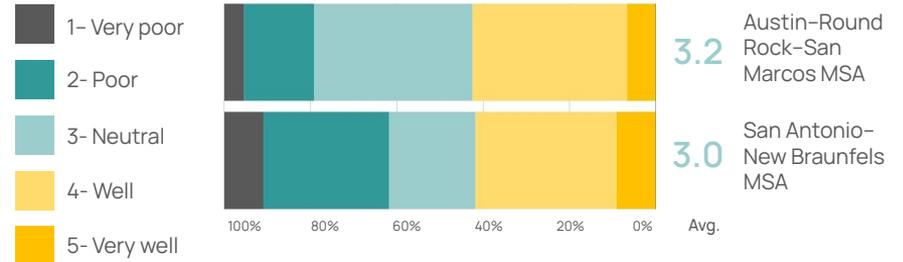
How important is airport connectivity to your city? (By MSA)

N=315



How well is your city performing on airport connectivity? (By MSA)

N=308

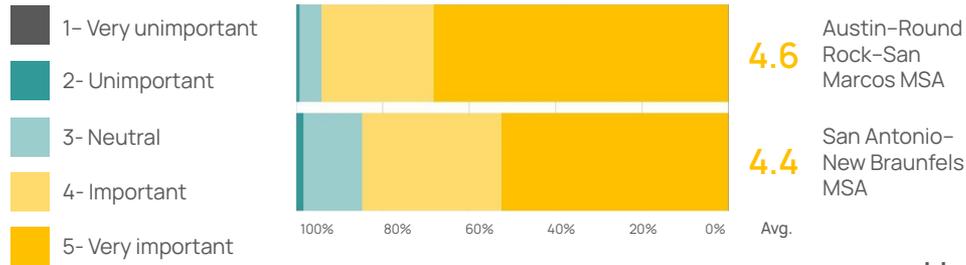


*Only comparisons with statistically significant differences shown.

Austin MSA leaders are more concerned about the importance, performance on housing availability than San Antonio MSA.

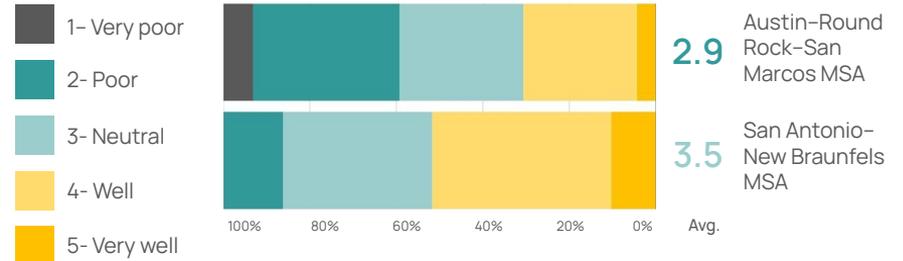
How important is housing availability to your city? (By MSA)

N=315



How well is your city performing on housing availability? (By MSA)

N=308



*Only comparisons with statistically significant differences shown.

Public Policy

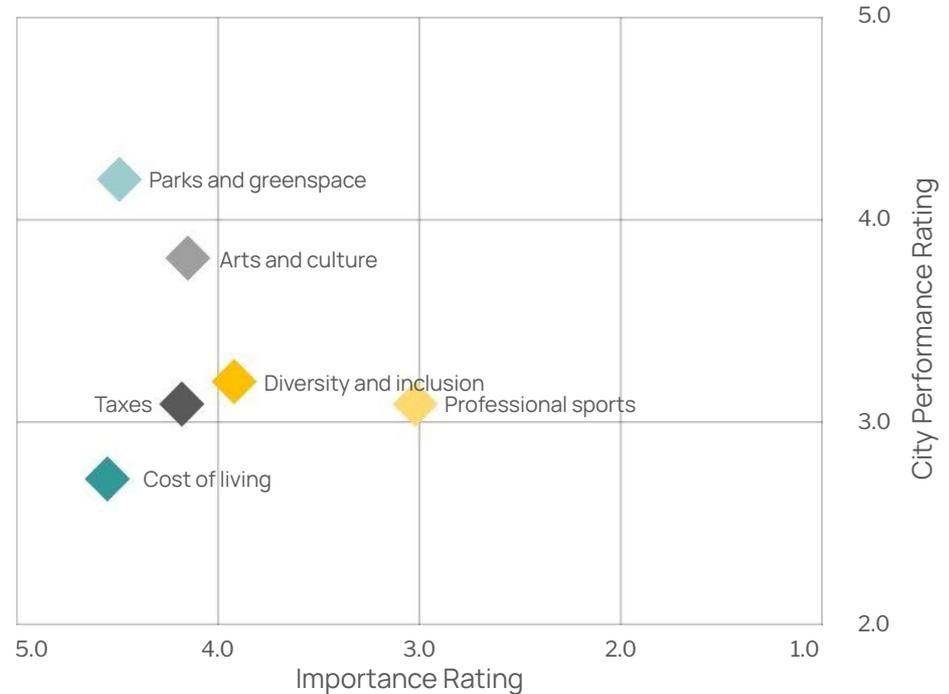
- 01 Education and Workforce
- 02 Infrastructure
- 03 Quality of Life
- 04 Social Services

Quality of life issues received the widest distribution of average importance and performance scores.

Performance Rating vs. Importance Rating, Quality of Life Issues

N=322

- Cost of living
- Parks and greenspace
- Taxes
- Arts and culture
- Diversity and inclusion
- Professional sports

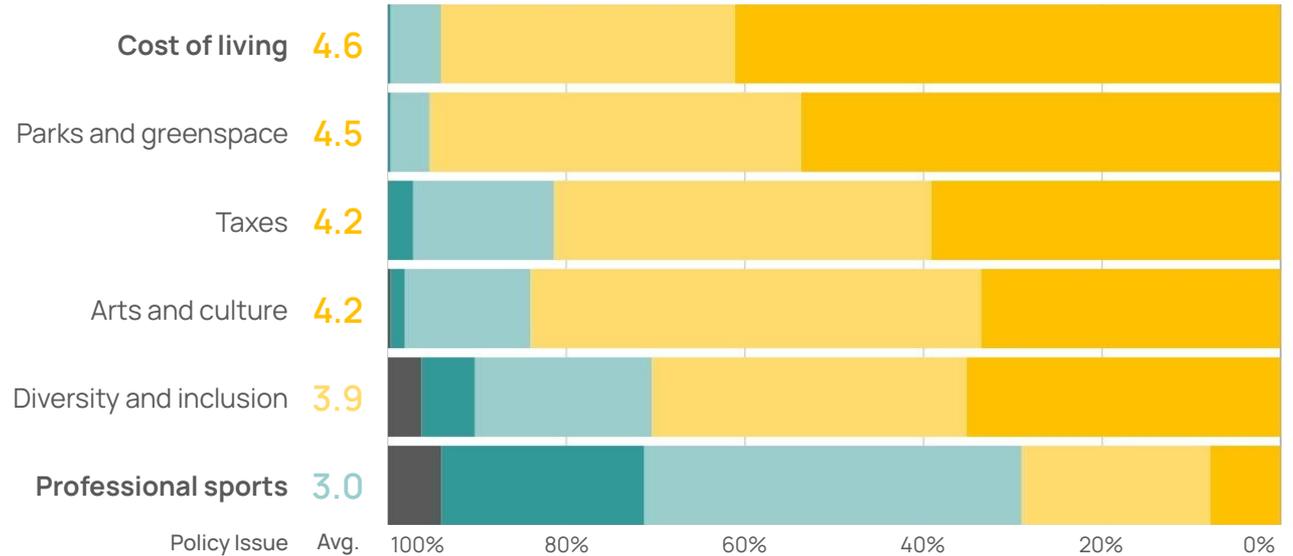


Importance: For quality of life, cost of living is rated the most important issue, and professional sports the least important.

How important are the following quality of life issues in your city?

N=320

- 1- Very unimportant
- 2- Unimportant
- 3- Neutral
- 4- Important
- 5- Very important

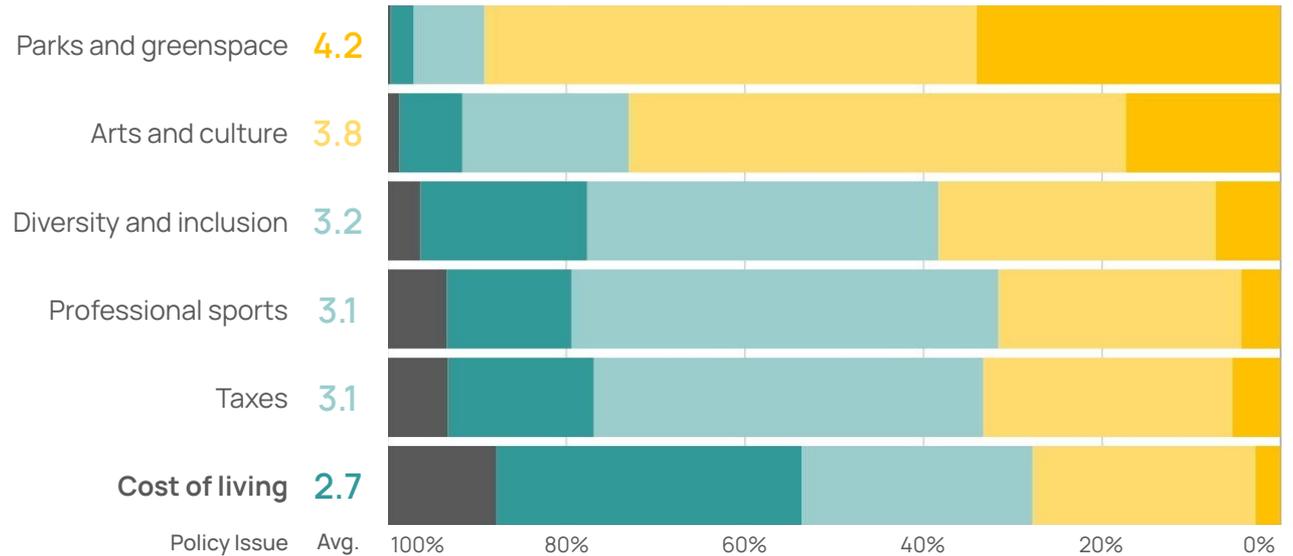


Performance: However, 46% of leaders believe their city performs poorly in cost of living.

How well is your city performing on the following quality of life issues?

N=314

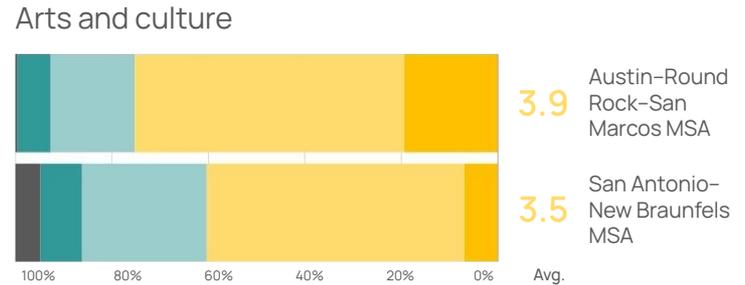
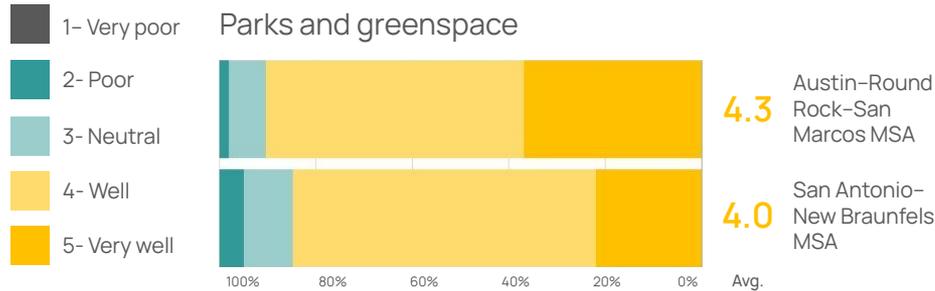
- 1- Very poor
- 2- Poor
- 3- Neutral
- 4- Well
- 5- Very well



Austin MSA leaders rate performance on parks and greenspace, and arts and culture higher than San Antonio MSA leaders.

How well is your city performing on the following quality of life issues?

N=308

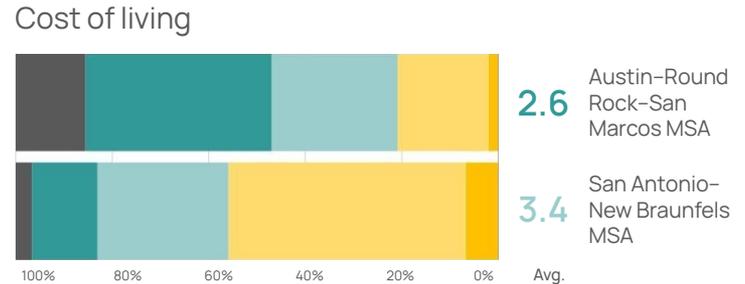
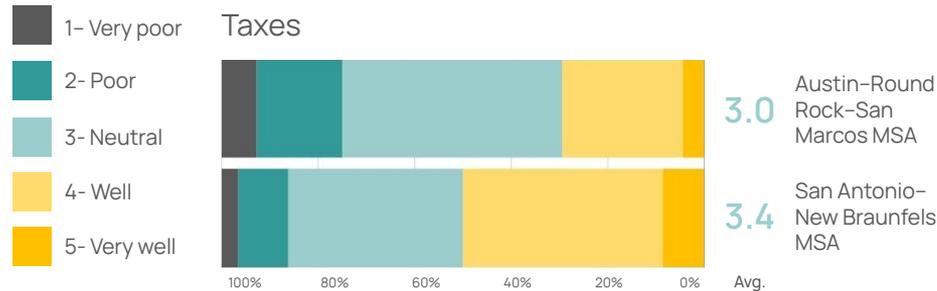


**Only comparisons with statistically significant differences shown.*

Leaders rate San Antonio MSA higher than Austin MSA in measures of affordability, including taxes & cost of living.

How well is your city performing on the following quality of life issues?

N=308



**Only comparisons with statistically significant differences shown.*

Public Policy

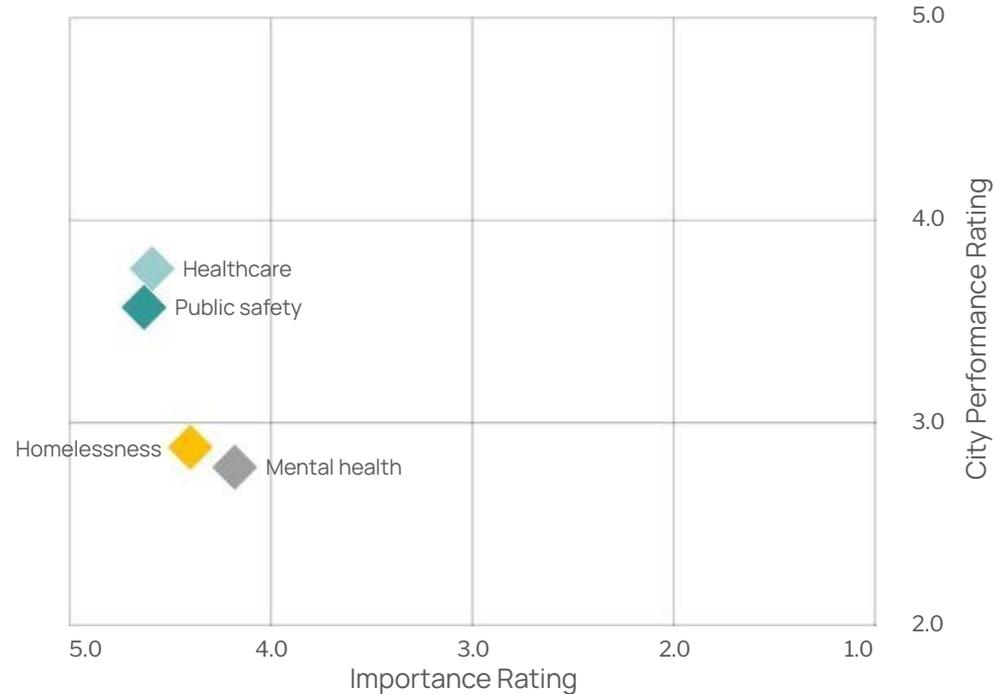
- 01 Education and Workforce
- 02 Infrastructure
- 03 Quality of Life
- 04 Social Services

Social service issues yielded the largest difference between average importance score and average performance score.

Performance Rating vs. Importance Rating, Social Services Issues

N=322

- Public safety
- Healthcare
- Mental health
- Homelessness

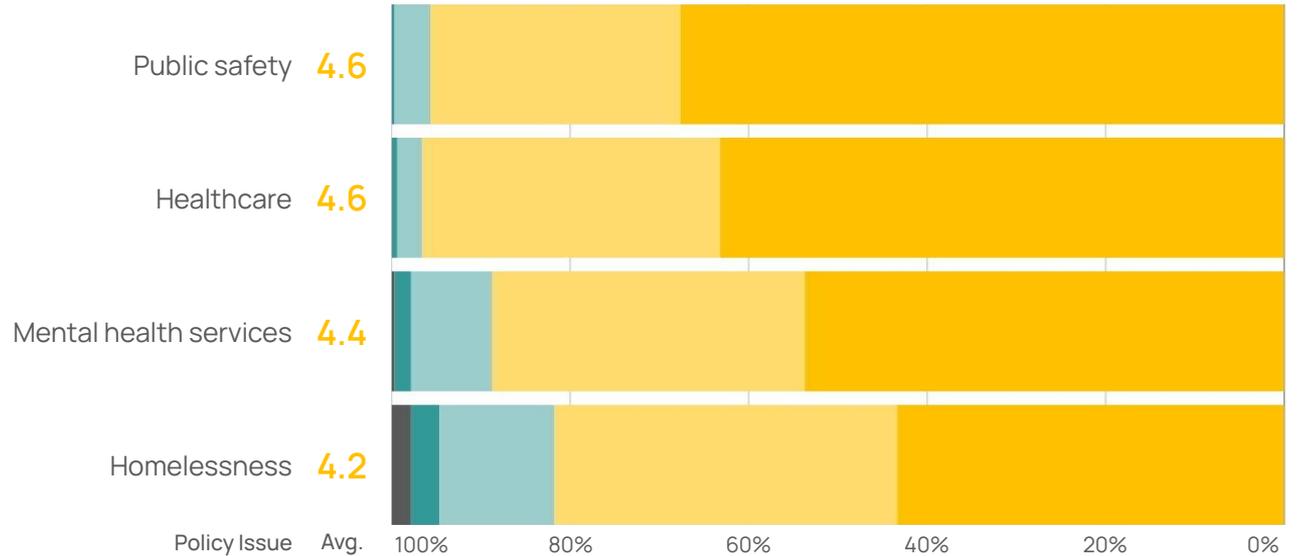


Importance: More than 80% of leaders consider all social service issues important within their city.

How important are the following social service issues in your city?

N=322

- 1- Very unimportant
- 2- Unimportant
- 3- Neutral
- 4- Important
- 5- Very important

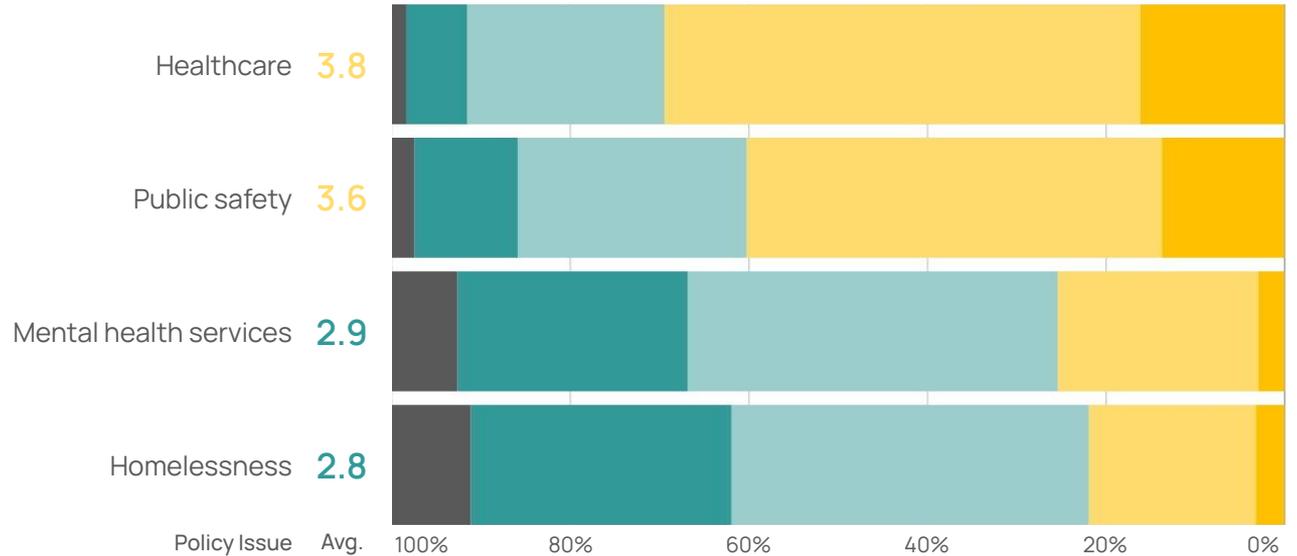


Performance: Cities excel in healthcare and public safety, but lag in mental health and homelessness.

How well is your city performing on the following social service issues?

N=314

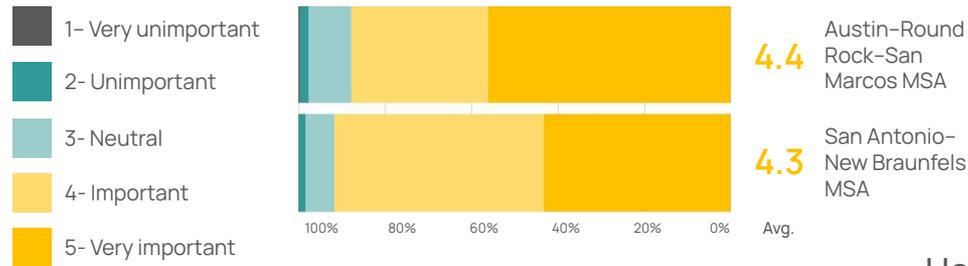
- 1- Very poor
- 2- Poor
- 3- Neutral
- 4- Well
- 5- Very well



Mental health is a key issue for both metros, but Austin MSA rated it slightly more important, albeit lower performing.

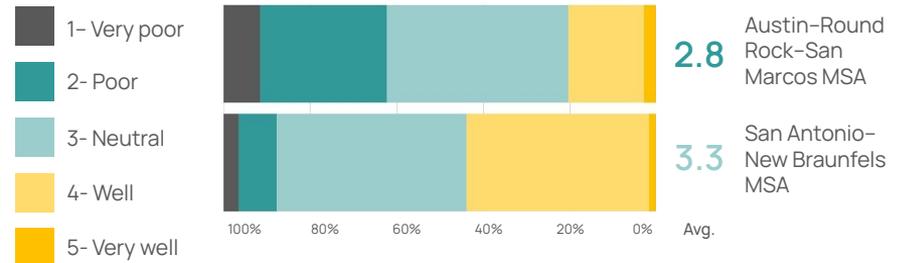
How important are mental health services to your city? (By MSA)

N=315



How well is your city performing on mental health services? (By MSA)

N=308

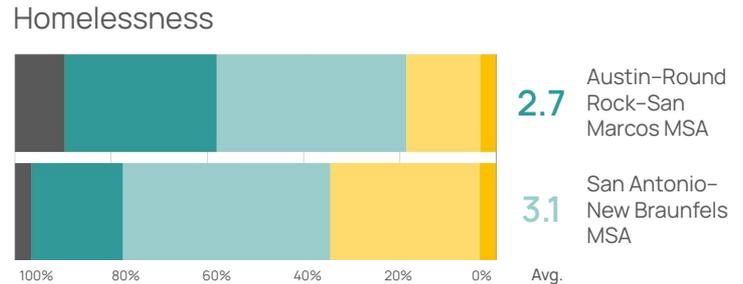
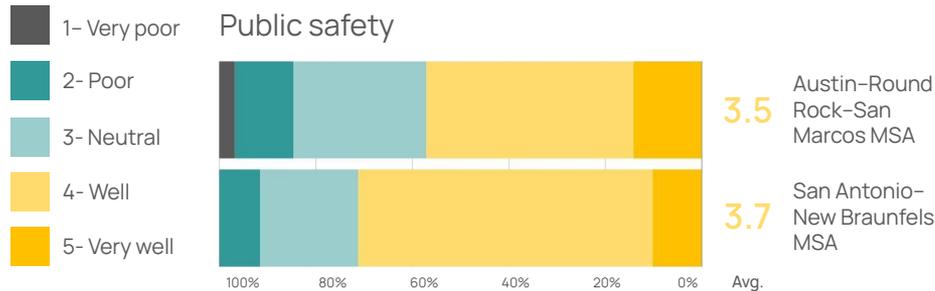


*Only comparisons with statistically significant differences shown.

Leaders rated San Antonio MSA higher than Austin MSA in its public safety and homelessness performance.

How well is your city performing on the following social service issues?

N=308



**Only comparisons with statistically significant differences shown.*

106 leaders named initiatives underway that have had some positive impacts. Here are some recurring recommendations.

Affordable Housing

ETOD, Strategic Housing Implementation Plan (SHIP), Affordability Unlocked, HOME Amendments, housing bonds, Austin ADU and occupancy limit changes

Transportation and Infrastructure

Project Connect, greenways, I-35 Expansion, Air Services Task Force, ABIA Terminal 2 Expansion

Homelessness

Haven for Hope, Austin Homeless Services Program, Homeless Navigation Service, Community First

Arts and Culture

Tobin Center

Economic Development and Workforce

Austin Infrastructure Academy, Good Jobs Challenge, City of Round Rock CDBG Plan, African American Leadership Institute

Climate, Water, and Energy Management

Blanco Cypress Watershed Plan, Climate Equity Plan, San Antonio River Foundation, SAWS/CPS Energy collaboration

Health

Martindale Community Library, Rural Healthcare Initiative, Center for Health Care Services

Child Care

Affordable Childcare NOW!, Travis County CARES

Civic Engagement

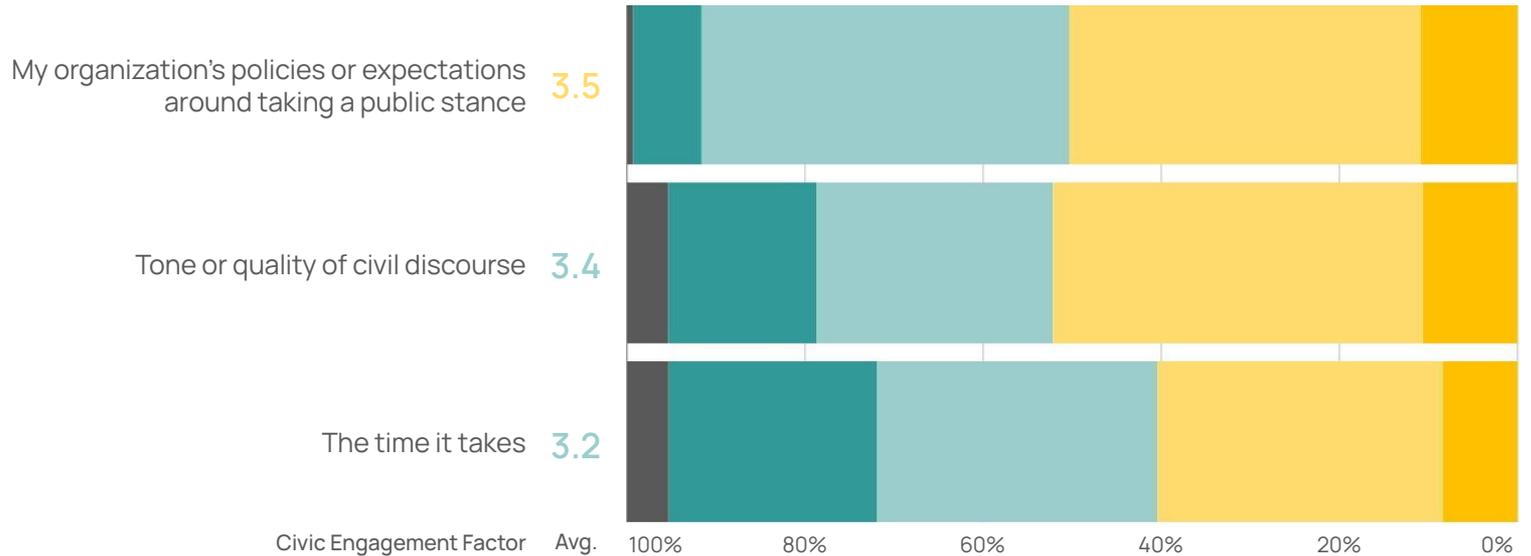
How are leaders engaging with their cities on local issues?

Organizational policies, tone, and time have little to no real effect on leaders' willingness to engage with their city.

How do the following factors affect your willingness to engage with your city?

N=309

- 1- Very negatively
- 2- Negatively
- 3- Neutral
- 4- Positively
- 5- Very positively

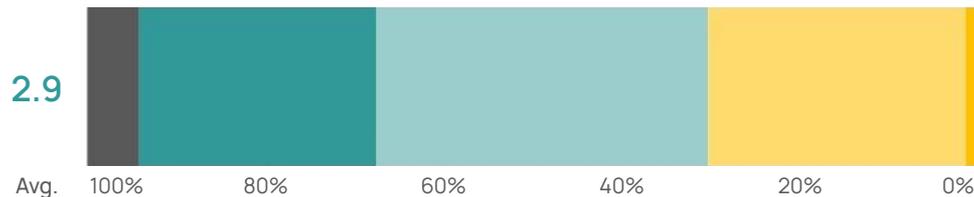


4 in 10 leaders are neutral on the quality of local news reporting in their city.

How would you describe the quality of local news reporting in your city?

N=312

- 1- Very low quality
- 2- Low quality
- 3- Neutral
- 4- High quality
- 5- Very high quality



Super-Regional Collaboration

Where do leaders see the need to collaborate together?

In this section, we asked leaders to consider the Austin–San Antonio super-region.

Definition

Central Texas' geographically linked ecosystem of communities, economies, and landscapes between Austin and San Antonio

Questions

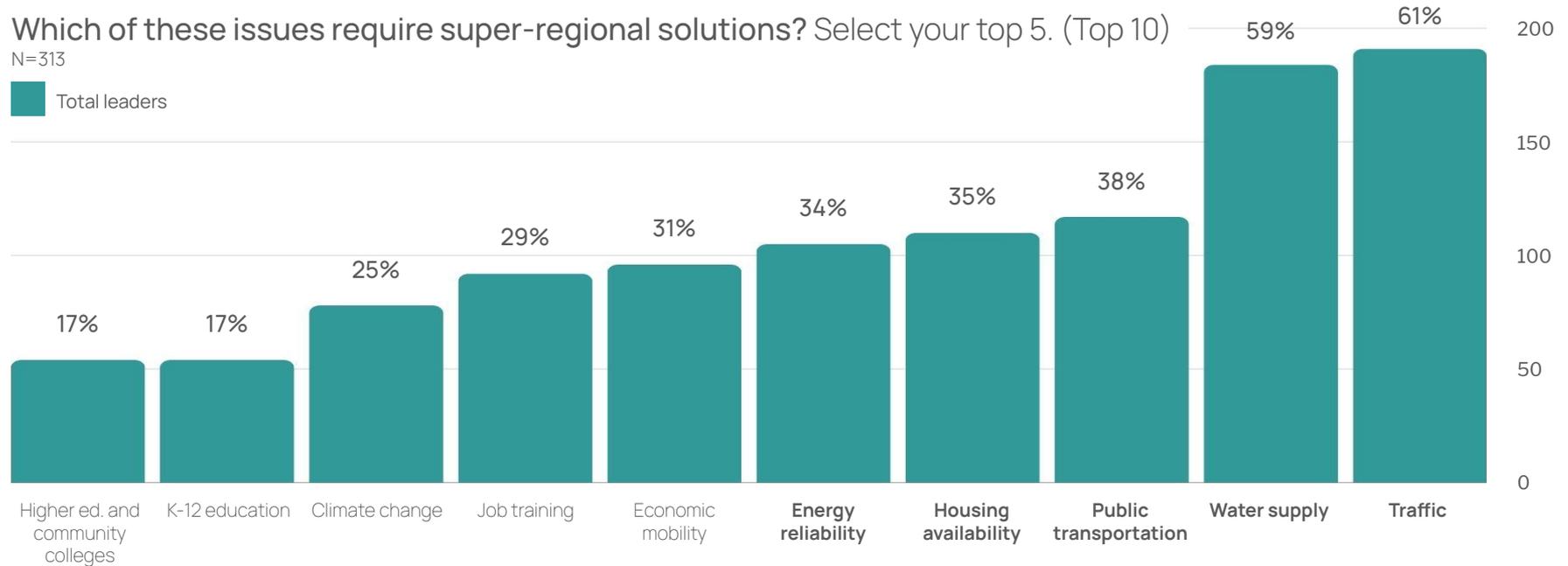
- First, we asked leaders to evaluate the policy issues from our 4 selected categories and determine which issues are super-regional by nature
- Second, we provided leaders with a series of needs and asked them to prioritize where super-regional collaboration is most essential

Infrastructure issues make up leaders' top 5 issues requiring super-regional solutions.

Which of these issues require super-regional solutions? Select your top 5. (Top 10)

N=313

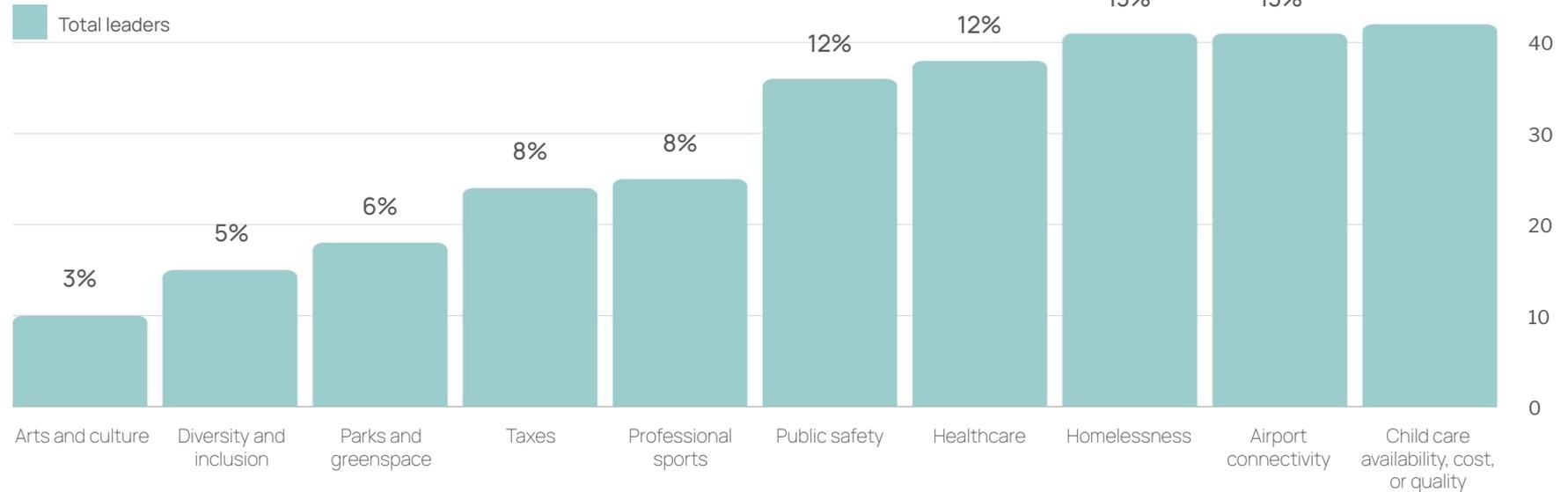
Total leaders



Most leaders in the super-region believe pro sports, public safety, and child care are best addressed at the local level.

Which of these issues require super-regional solutions? Select your top 5. (Bottom 10)

N=313



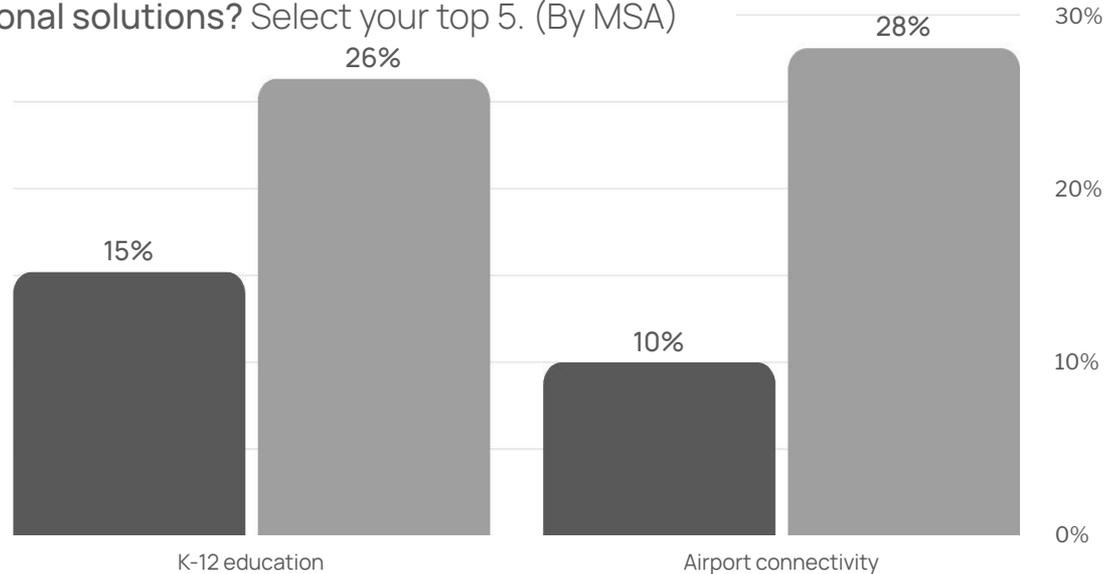
San Antonio MSA leaders more often see K-12 education and airport connectivity as super-regional issues.

Which of these issues require super-regional solutions? Select your top 5. (By MSA)

N=307

-  Austin-Round Rock-San Marcos MSA
-  San Antonio-New Braunfels MSA

**Only comparisons with statistically significant differences shown.*



Transportation planning, including rail, is the top priority for super-regional collaboration.

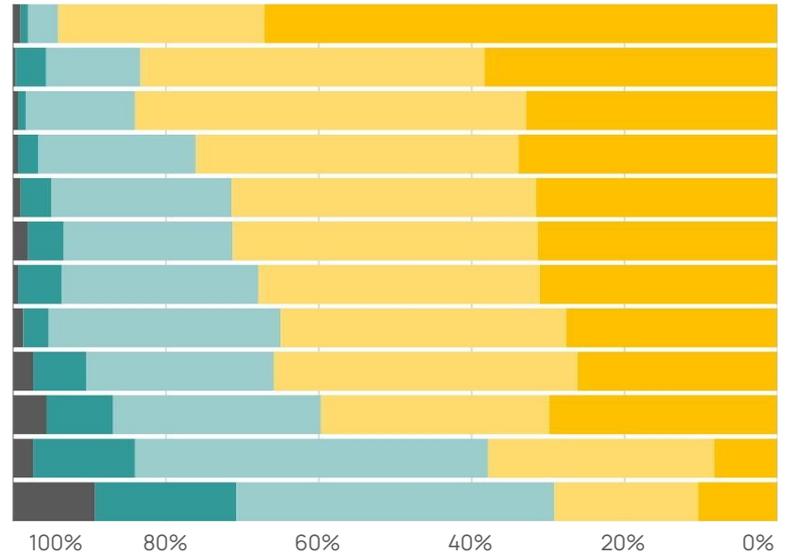
How essential is super-regional collaboration to these needs?

N=304

- 1- Very inessential
- 2- Inessential
- 3- Neutral
- 4- Essential
- 5- Very essential

Transportation planning, including rail planning	4.6
Business attraction plans to maintain competitiveness	4.2
Emergency preparedness responses and resources	4.2
Workforce training for a stronger shared talent pool	4.0
Housing plans tackling availability and affordability	4.0
Protecting the Hill Country from overdevelopment	3.9
Public safety in our communities	3.9
A more collaborative healthcare system	3.9
A collective action-style response to homelessness	3.8
A regional climate strategy	3.7
Developing destinations and entertainment venues	3.3
More professional sports teams	3.0

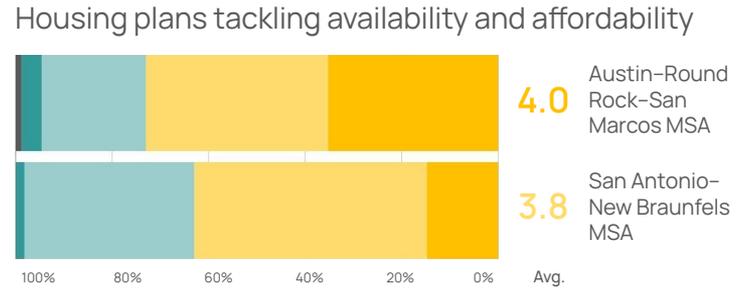
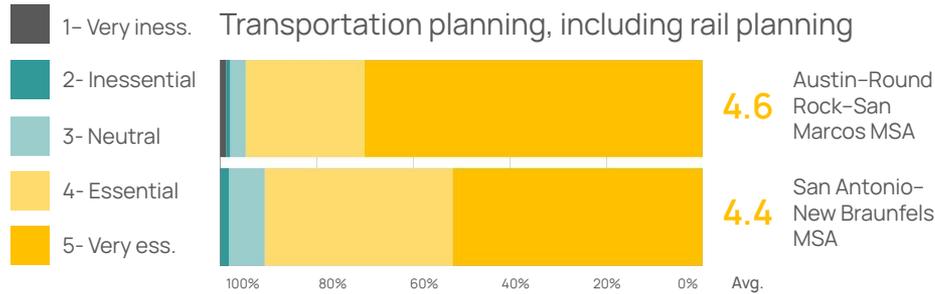
Super-regional need Avg.



For Austin MSA leaders, there is even more demand for super-regional collaboration on transportation.

How essential is super-regional collaboration to these needs?

N=298



**Only comparisons with statistically significant differences shown.*



Main headlines

What are the big takeaways from our super-regional leaders?

Leaders are largely very satisfied with the cities in which they live.

93%

of leaders **feel positively** about their city.

87%

of leaders **would recommend** their city to someone.

87%

of leaders feel their city is a **good place** to raise a family.

76%

of leaders feel their city is **making progress**.

Where Austin leaders want more affordability, San Antonio leaders want more access.

		Austin-Round Rock-San Marcos MSA	San Antonio-New Braunfels MSA
Affordability	Child care availability, cost or quality	▼	▲
	Economic mobility	▼	▲
	Cost of living	▼	▲
	Taxes	▼	▲
	Public transportation	▼	▲
	Housing availability	▼	▲
	Energy reliance	▼	▲
	Homelessness	▼	▲
Access and Amenities	Airport connectivity	▲	▼
	Healthcare	▲	▼
	Access to attractions & entertainment	▲	▼
	Arts & culture	▲	▼
	Access to parks & greenspace	▲	▼

*Only comparisons with statistically significant differences shown.



Higher avg. MSA rating



Lower avg. MSA rating

Infrastructure issues make up leaders' top 5 issues requiring super-regional solutions.

Top 5 issues requiring super-regional solutions:

1. Traffic (61%)
2. Water supply (59%)
3. Public transportation (37%)
4. Housing availability (35%)
5. Energy reliability (34%)

Bottom 5 issues requiring super-regional solutions:

1. Professional sports (8%)
2. Taxes (8%)
3. Parks & greenspace (6%)
4. Diversity & inclusion (5%)
5. Arts & culture (3%)

Super-regional leaders agree that water security is critical and must be prioritized.

Issues most in need of super-regional solutions:

1. Traffic (61%)
2. Water supply (59%)
3. Public transportation (37%)
4. Housing availability (35%)
5. Energy reliability (34%)

Infrastructure issues by importance:

1. Water supply
2. Energy reliability
3. Housing availability
4. Traffic
5. Emergency Preparedness
6. Airport connectivity
7. Public Transportation
8. Climate Change

Methodology

Target Population

Community leaders in government, nonprofit community organizations, education, business, and healthcare from the Austin–Round Rock–San Marcos and the San Antonio–New Braunfels Metropolitan Statistical Areas

Data Collection

- Non-random, non-scientific survey
- Highly-curated survey population of 1169
- Survey distributed by email in English via Survey Monkey over a 17 day period between September 3–September 20, 2024



Laura Huffman

Partner

(512) 422-3948

laura@civicsol.com

Steven Pedigo

Partner

(617) 785-0807

steven@civicsol.com