

Insights:

AARO's 2024 Austin-San Antonio Leaders Survey

December 9, 2024

Survey Overview

Engagement Purpose

To understand how leaders in the Austin-San Antonio super-region:

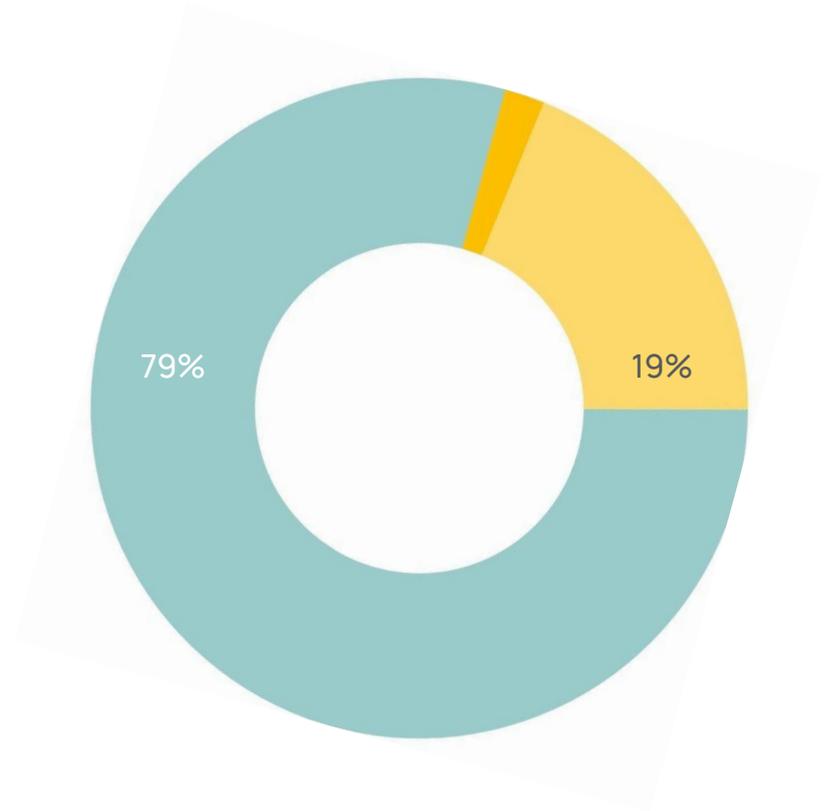
- Prioritize issues and challenges in their communities
- Rate performance on important issues in their communities
- Prioritize priorities for the entire super region
- Define issues that REQUIRE super regional cooperation

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

Place of Residence

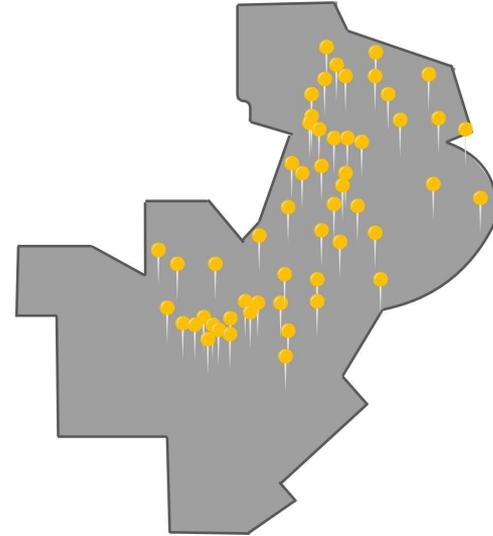
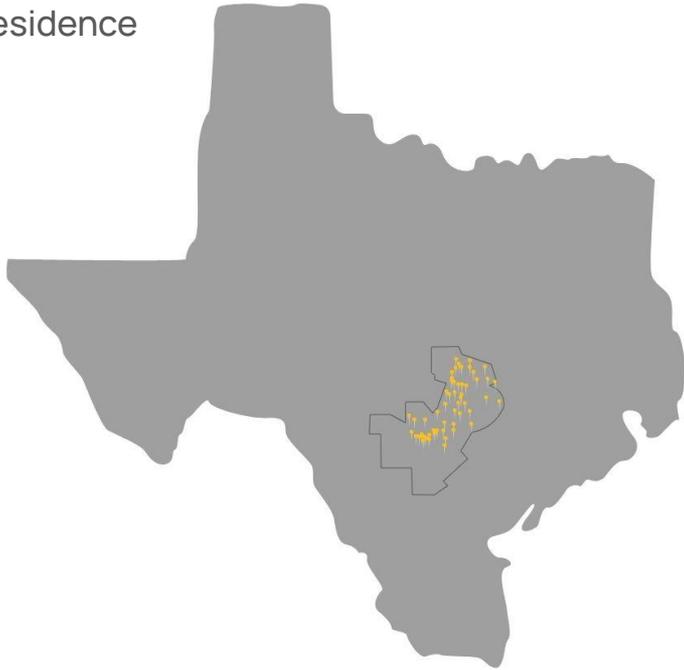
N=355

- 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



City Satisfaction

How do regional leaders feel about their cities?

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.

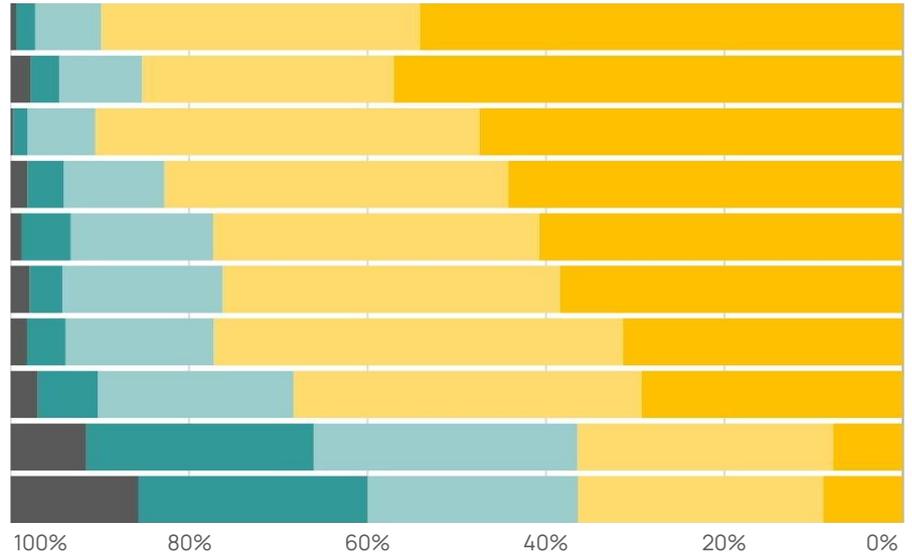
Leaders rate most city characteristics highly, but affordability and transportation lag.

How would you rate the following characteristics of your city?

N=332



Access to nature (e.g., parks, rivers, trails)	4.4
Makes sense for my work	4.4
Good place to raise a family	4.4
Access to quality education	4.2
Access to attractions and entertainment	4.1
Community reflects my values	4.1
Access to quality healthcare	4.0
Low crime rates	3.9
Varied modes of transportation	3.0
Affordability	2.9



However, Austin metro leaders are more concerned about affordability, San Antonio metro leaders are more concerned about access.

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

*Only comparisons with statistically significant differences shown.



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.

Public Policy

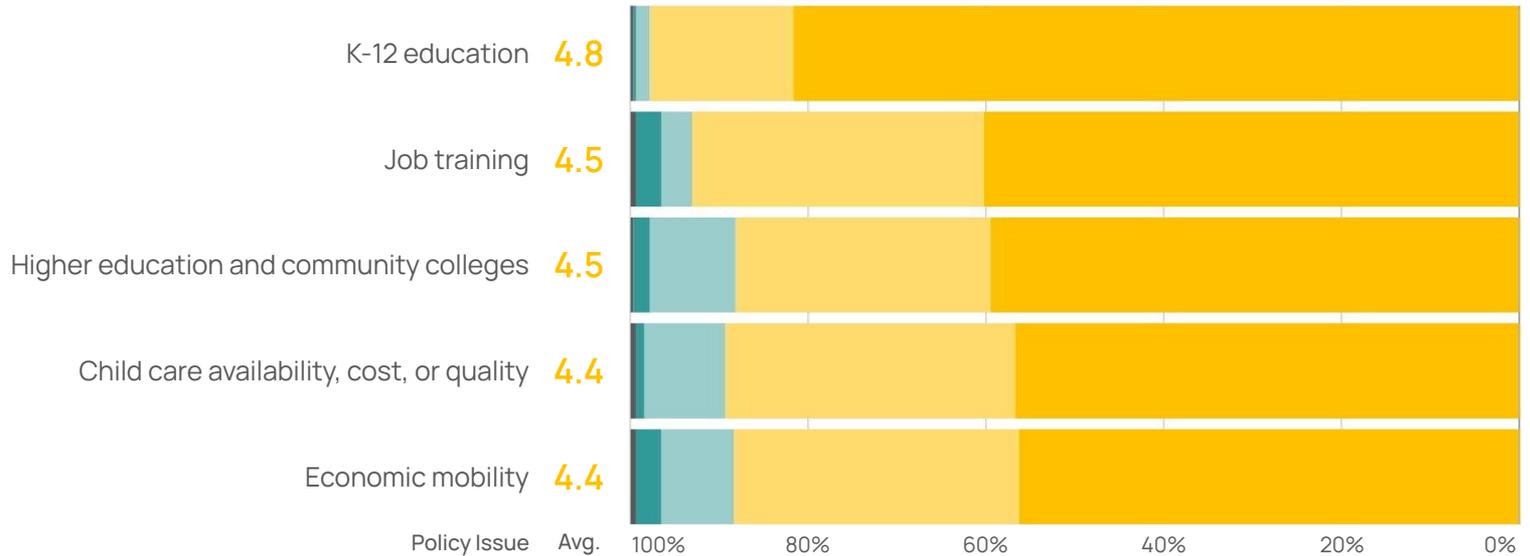
- 01 Education and Workforce
- 02 Infrastructure
- 03 Quality of Life
- 04 Social Services

Importance: 90% of super-regional leaders agreed education and workforce 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

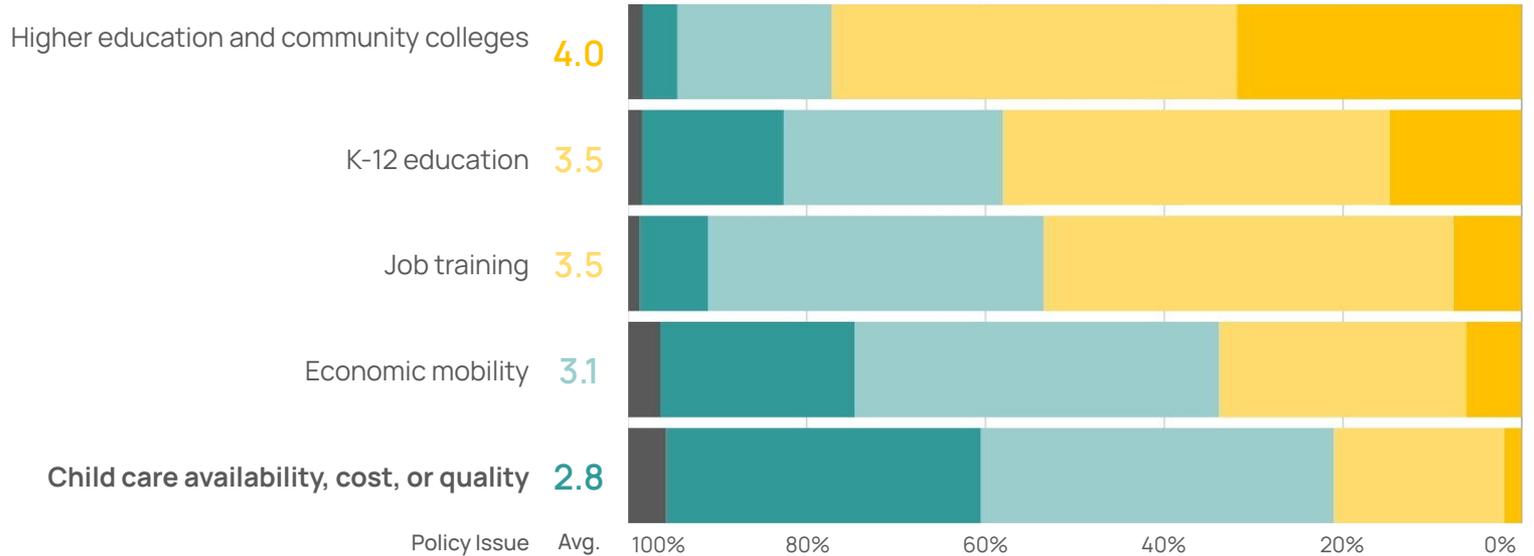


Performance : But nearly 40% of leaders believe their city underperforms in child care.

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



Public Policy

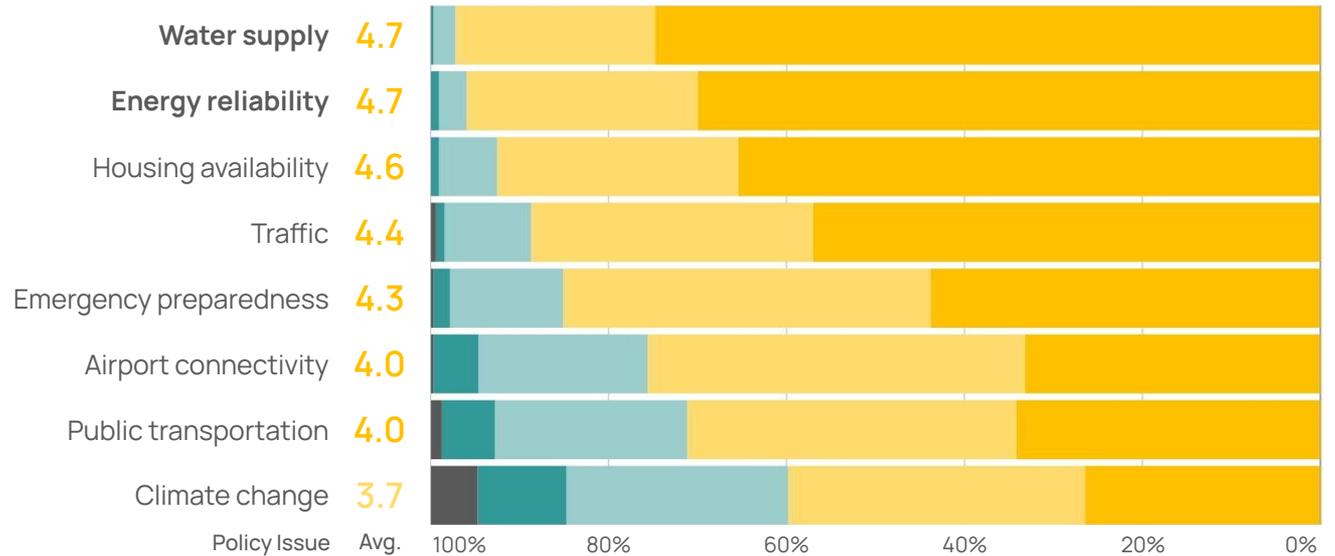
- 01 Education and Workforce
- 02 Infrastructure
- 03 Quality of Life
- 04 Social Services

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

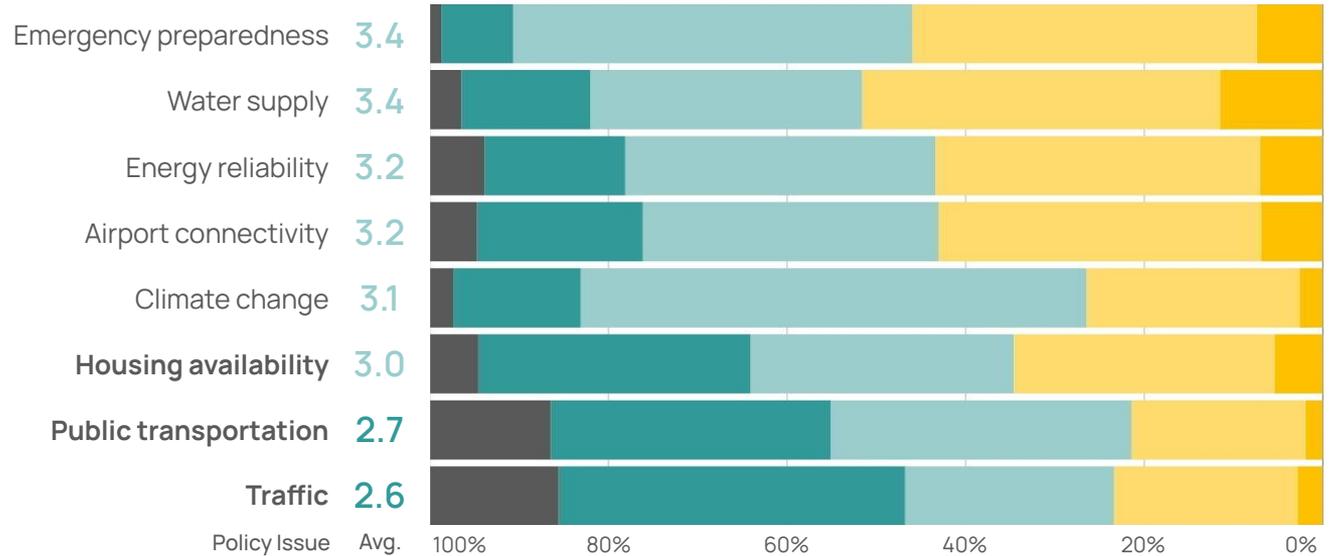


Performance: Traffic, public transportation, and housing availability rank lowest in city performance.

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



Public Policy

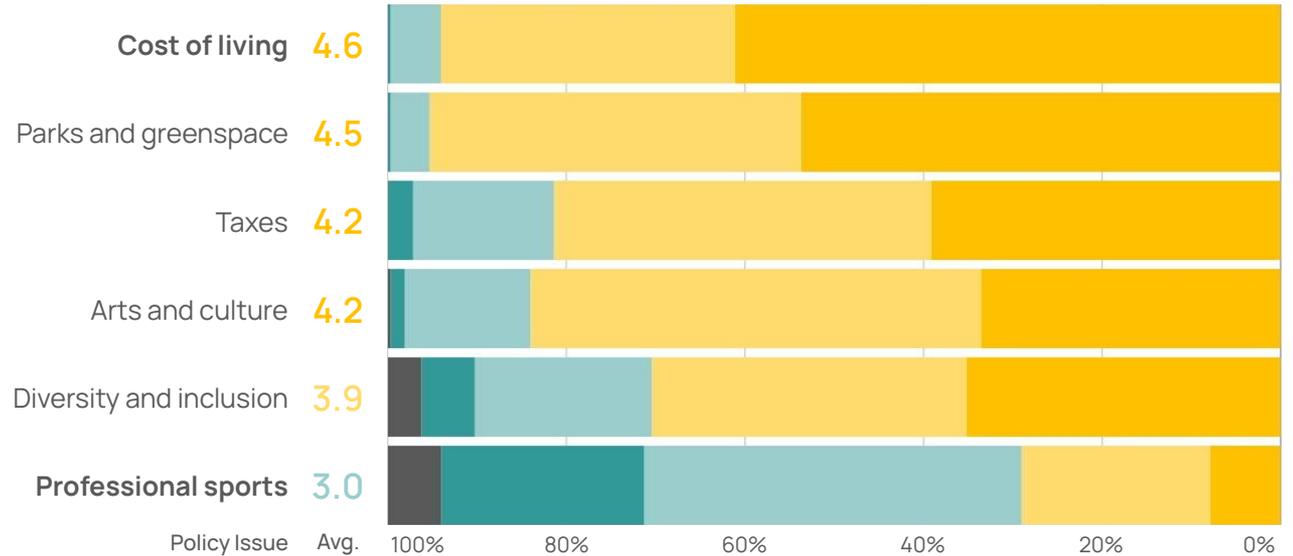
- 01 Education and Workforce
- 02 Infrastructure
- 03 Quality of Life
- 04 Social Services

Importance: Cost of living is rated the most important quality of life issue, 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

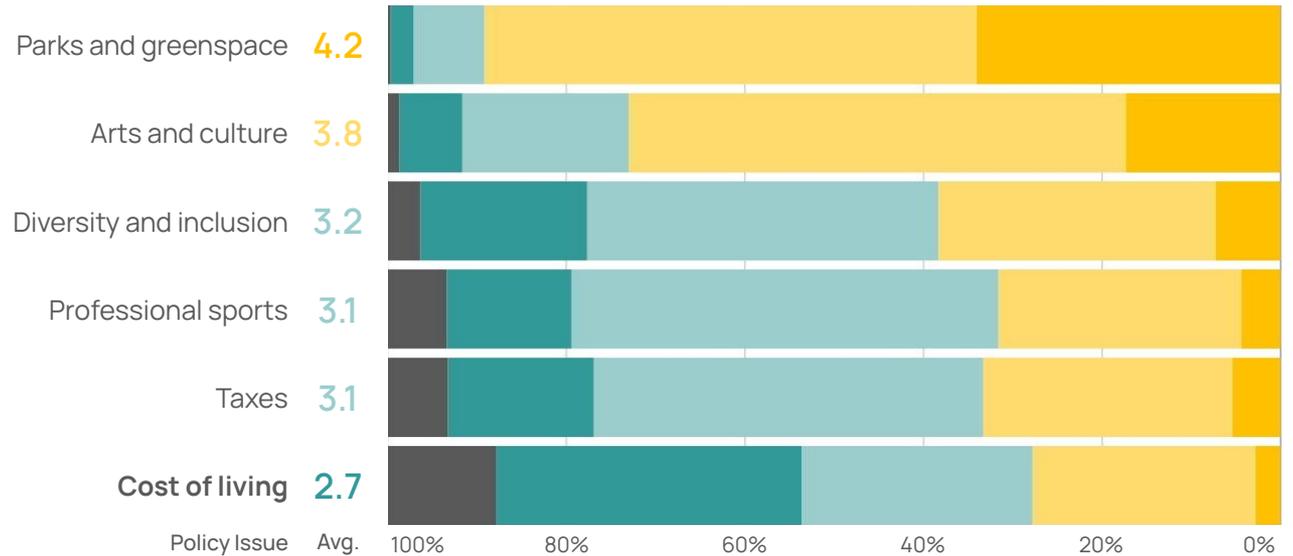


Performance: However, 46% of leaders believe their city performs poorly in cost of living.

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



Public Policy

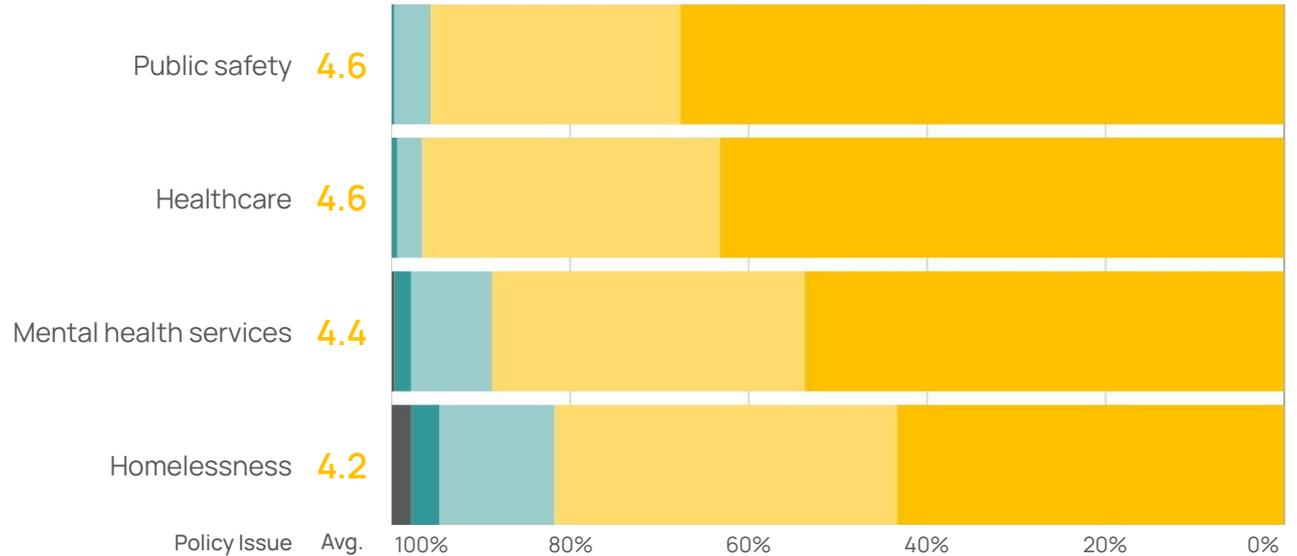
- 01 Education and Workforce
- 02 Infrastructure
- 03 Quality of Life
- 04 Social Services

Importance: More than 80% of leaders consider all safety & 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

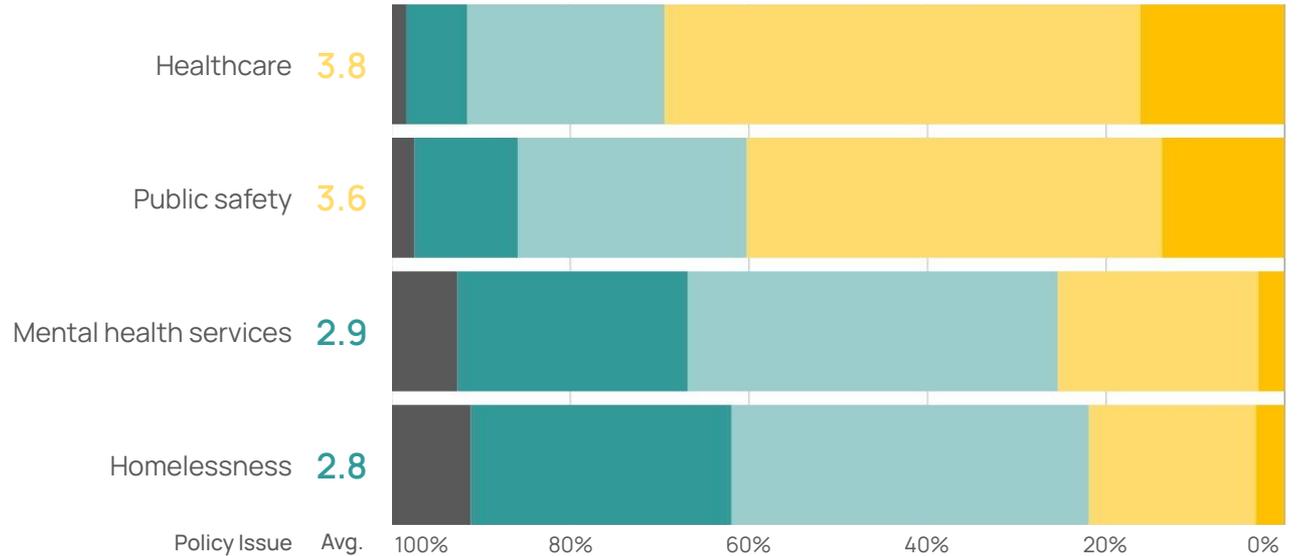


Performance: Cities lag in mental health and homelessness services.

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



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

The Super Region is a geographically linked ecosystem of communities, economies, and landscapes between Austin and San Antonio.

Questions

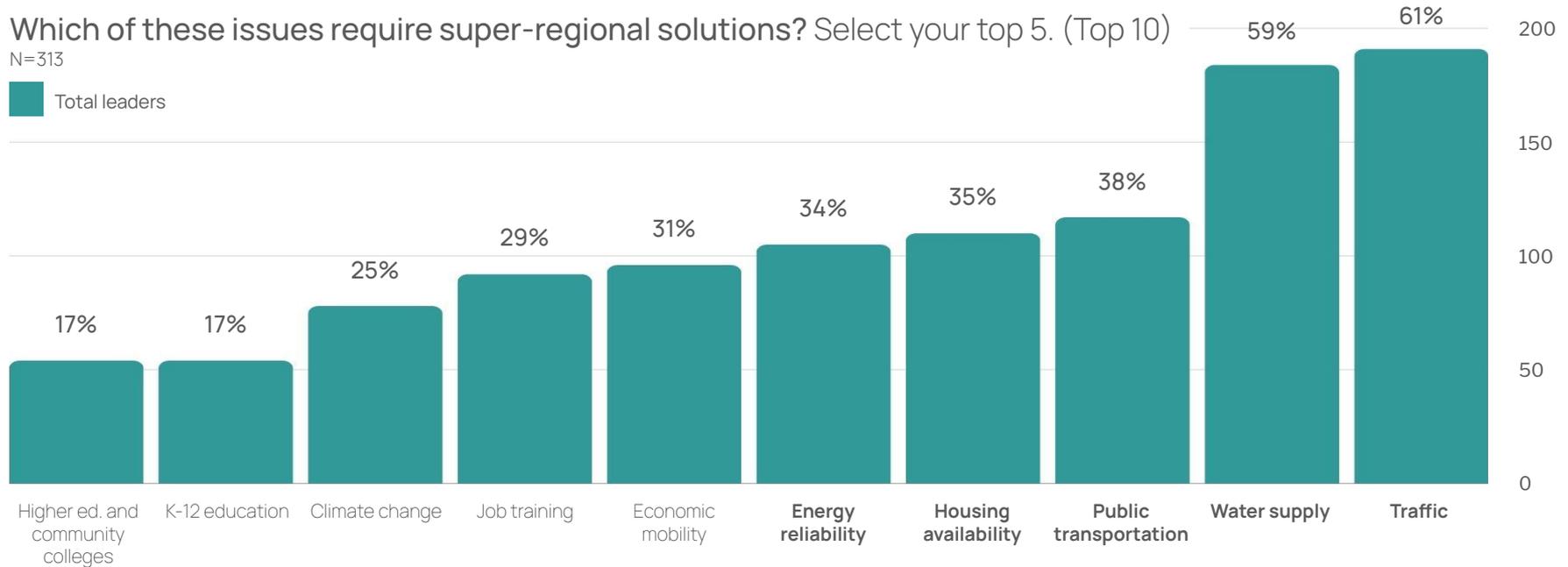
- We asked leaders to evaluate the policy issues from our 4 selected categories and determine which issues are super-regional by nature.

Infrastructure issues are the top 5 issues requiring super-regional solutions.

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

N=313

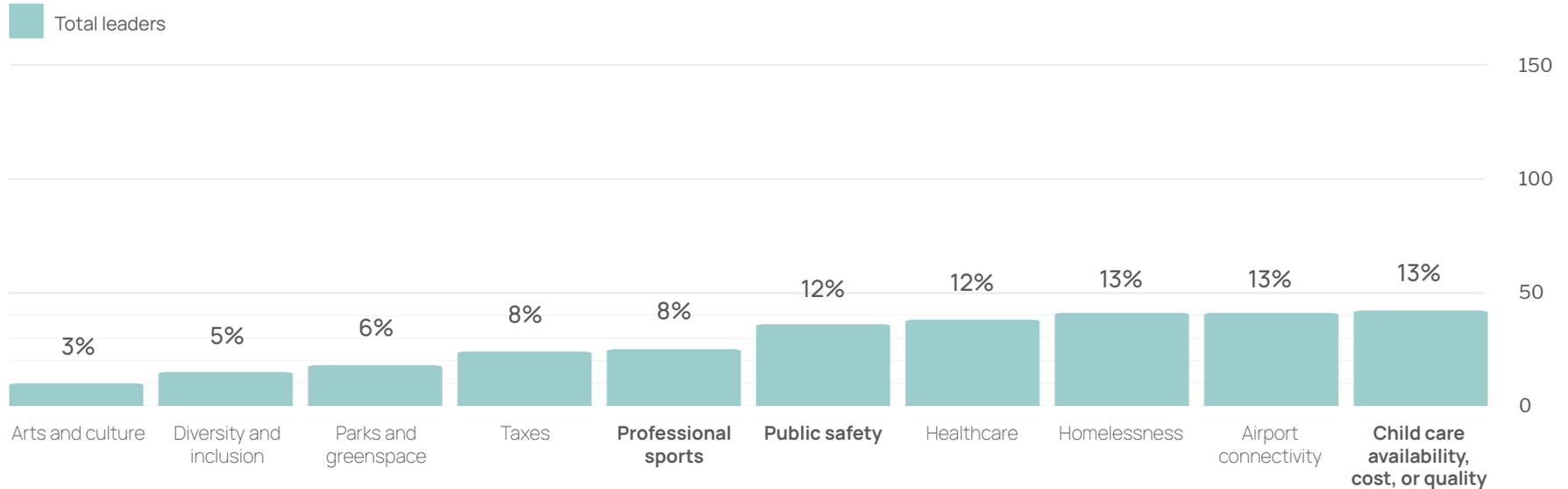
Total leaders



Most leaders in the super-region do not believe pro sports, public safety, and child care require super-regional solutions.

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

N=313



Leaders agree that water security both a local and super regional priority 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%)

Most important infrastructure issues at the city level:

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



Key Takeaways

What did we learn?

Key Takeaways

- Robust survey and focus group participation – we can continue to improve San Antonio participation
- Regional leaders are generally very satisfied with their cities
- At the local level, childcare, economic mobility, housing and infrastructure are important to leaders but performance needs to improve
- At the super regional level, transportation, water, energy and housing are the critical areas for super regional collaboration



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