



City of Horseshoe Bay

**Long Range Plan Community Survey
Final Report**

June 2016

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INTRODUCTION

The City of Horseshoe Bay appointed a Long Range Planning Committee (LRPC) to provide recommendations for a five to ten-year plan for this young city. In doing so, the LRPC incorporated several systems of research to access broad input from the citizenry to inform their recommendations which included: extensive briefings from city departments, the Resort, individual stakeholder interviews, an open community survey, and two town hall meetings. This report details the results of the community survey conducted during March and April 2016.

BACKGROUND

Important to this survey project, is an understanding of the history and evolution of the City of Horseshoe Bay (HSB). The community was founded in 1974 by the Hurd family along with a Property Owner's Association (POA) for the developed HSB residential subdivision in the 1970's. In 1996 the Jaffe family purchased the Hurd holdings and assumed management of the Resort and real estate. Since the beginning, additional subdivisions were developed and governed by individual POA and Home Owner Associations (HOA). In 2005, the citizens in this area voted to incorporate as a Class A City and a Home Rule Council-Manager Government was established. Since that time, the City has been challenged to develop its identity separate from the Horseshoe Bay Resort and POA/HOA organizations, while continuing to work in partnership with these important entities. Indeed, the resort and POA/HOA organizations were communication conduits for survey distribution. For these reasons, there are several questions within the survey that refer directly or indirectly to the HSB Resort and POAs.

Additionally, as an often referred to "resort/retirement community," there are citizens who reside here year-round as well as a significant number of residents who occupy homes in HSB only part-time (primarily through the autumn and spring months) or on a weekend or vacation basis. While 2015 information (ESRI Demographics) reports a population of 4471, the City reports a population calculation of 3,381 water meters multiplied by 1.99 residents per meter for a total population of 6,728. Based on survey demographic responses, that would equate to 4,389 full time and 2,521 part-time residents. These population characteristics presented challenges in both survey distribution, collection and return calculations.

The Long Range Planning Community Survey was an open survey, accessible through the City's website and promoted through City, HSB Resort, local POA's and the local newspaper. Paper surveys were also available at several public locations. A total of 1369 responses were collected, a very good response, and analyzed in this report. See the Methodology section for more detail on how the survey was designed, disseminated and collected.

RESPONDENT CHARACTERISTICS

Of the 14 questions in the survey, Questions #1 through #5, #7 and #13 were designed as population characteristic questions which were anticipated to be primarily used as filter (or cross tabulation) fields.

These characteristic filters included:

Question 1 Location of primary residence

Question 2 Length of time living in HSB primary residence

Question 3 Full time or Part time residency

Question 4 Type of domicile

Question 5 Length of time any property has been owned

Question 7 Age group

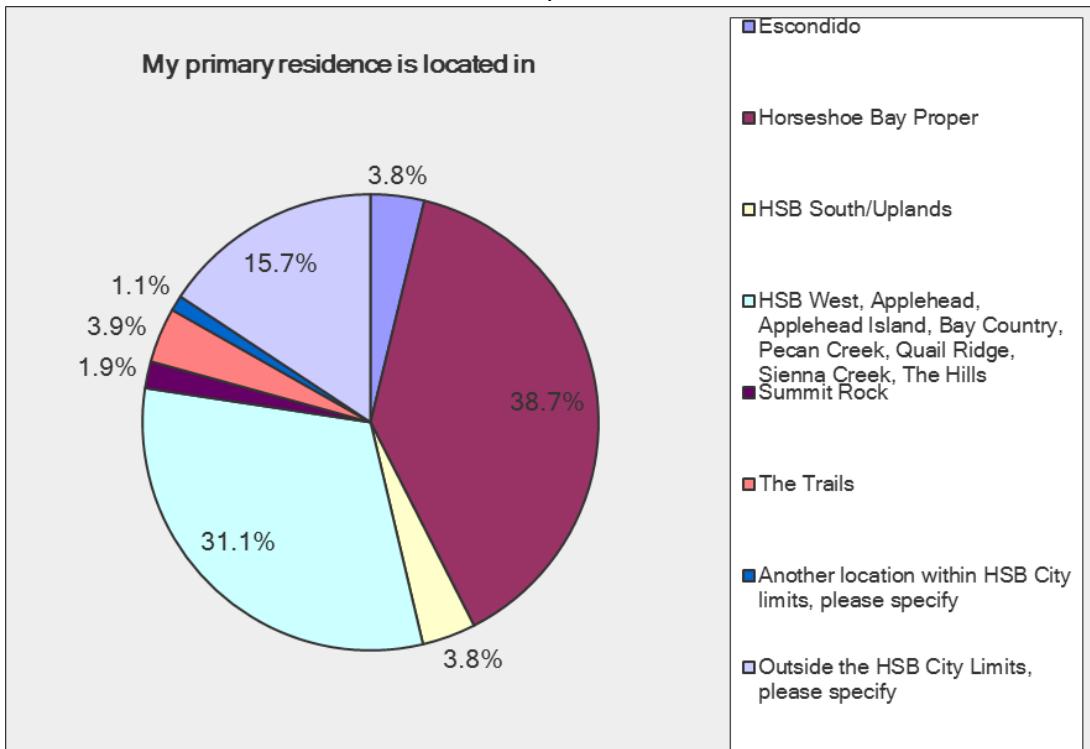
Question 13 HSB Resort membership

Question 1

Most respondents make HSB proper their primary residence at 38.7% followed closely by the combined area that includes HSB West, Applehead, Applehead Island, Bay Country, Pecan Creek, Quail Ridge, Sienna Creek, and The Hills at 31.1%

Respondents from “Outside the HSB City Limits” were largely from the surrounding HSB area (20%), San Antonio area (19%), Dallas area (15.6%), Houston (12.7%) and Austin (12.3%) areas. Only 6% were from out of state.

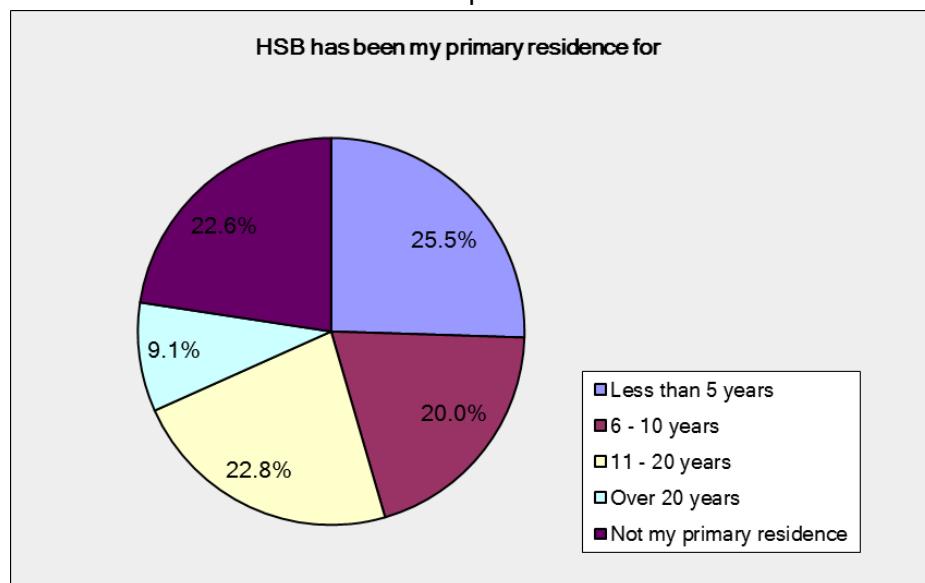
Graph 1



Question 2

In length of primary residency, other than the “over 20 years” group, all other respondent groups are very similar, ranging from 20% to 25.5%. The “over 20 years” group will be mentioned again in Question 5.

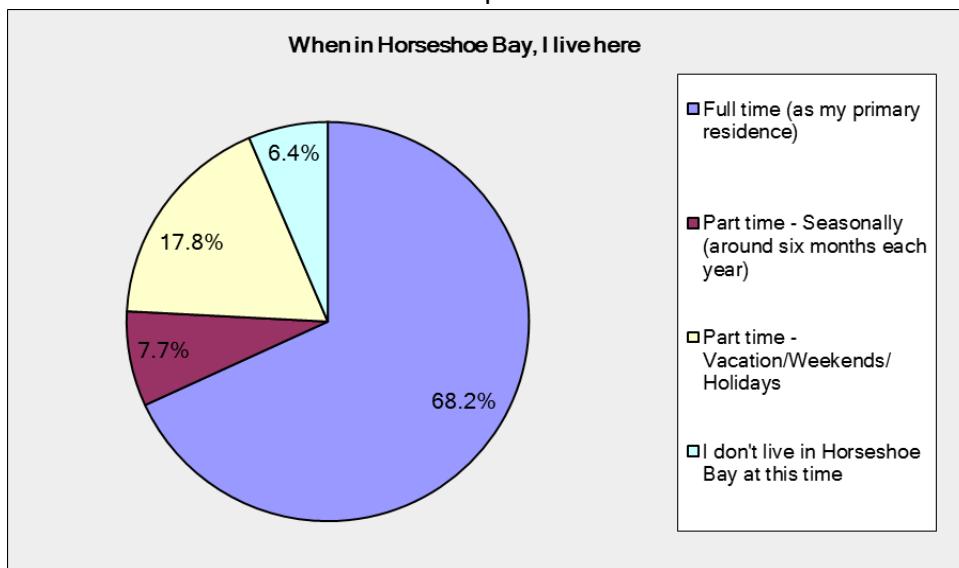
Graph 2



Question 3

Full time residents are the largest respondent group at 68.2%. They are the easiest group to reach with survey promotions and may be the most interested in the participating in City planning that will effect them on a daily basis. Interestingly, the next largest group of respondents, the part-time residents that live here on a short term basis (weekends and holidays), responded at more than twice the rate of the other part time residents who live in HSB on a seasonal basis.

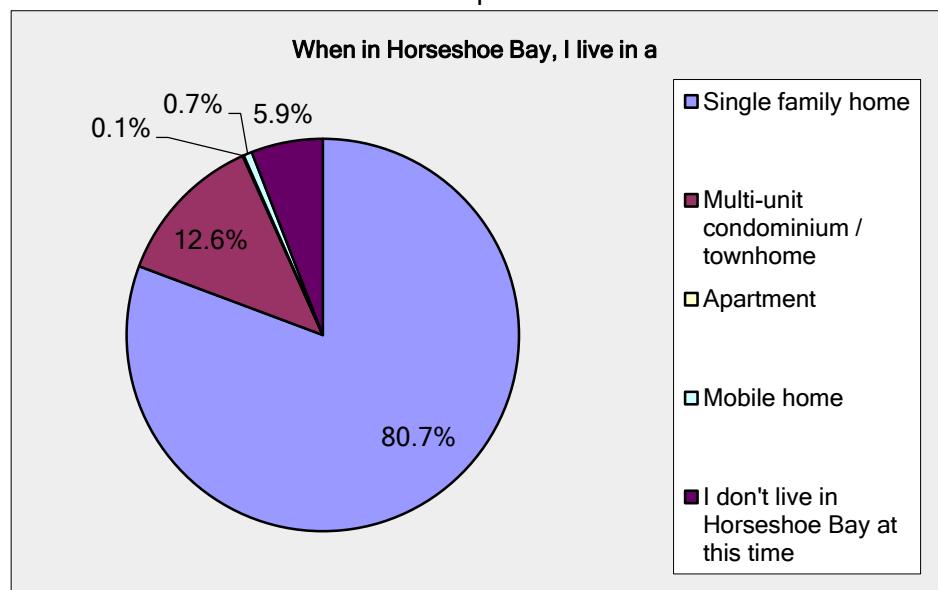
Graph 3



Question 4

80.7% respondents live in a single family homes and only 12.6% in multi-unit dwellings. This may indicate a more affluent responding population.

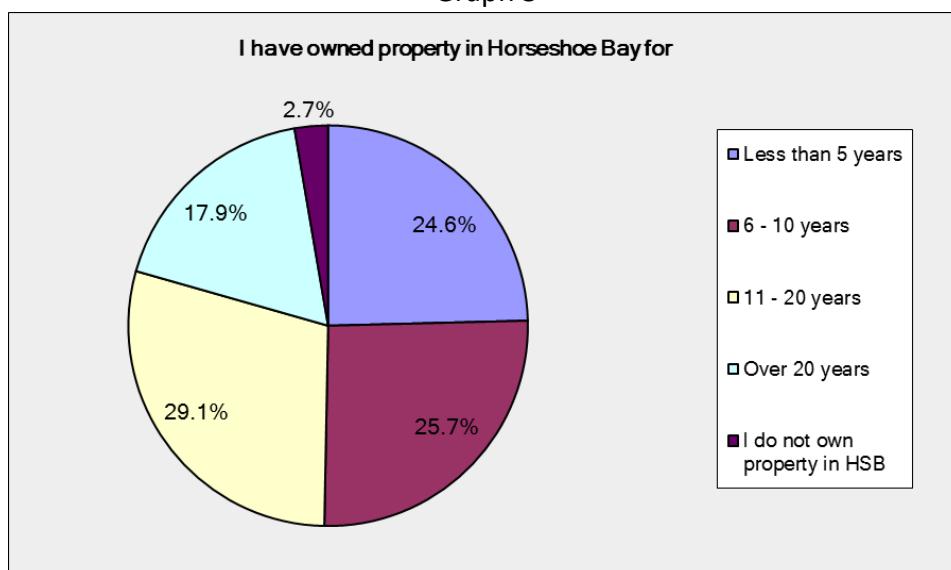
Graph 4



Question 5

Property ownership, not necessarily as a primary residence, but possibly as a second home or yet undeveloped land, is relatively equally spread including the "over 20 years" group of respondents. This could indicate respondents have a longer term relationship with HSB than Question 2 seems to show. It is very interesting that 47% of respondents owned property before the incorporation of the City and 50.3% since incorporation, almost evenly splitting perspectives of governance in HSB.

Graph 5

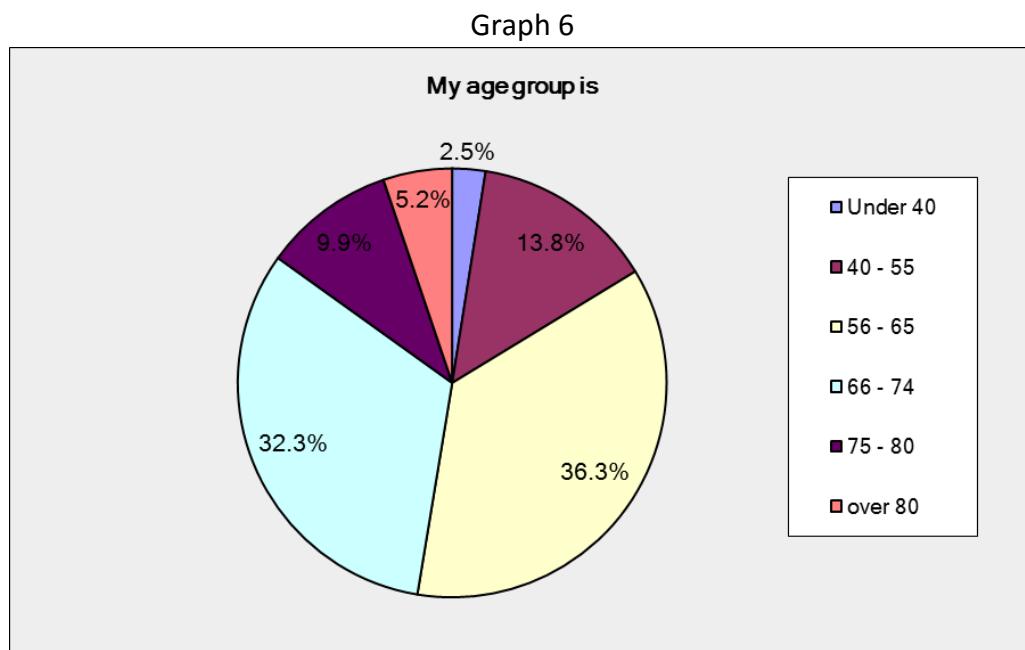


Question 7

From a community wide perspective, especially in long range planning, the age of respondents is particularly important, though not surprising. The majority of all respondents fall between the ages of 56 and 74, very much in support of HSB being a retirement community.

In nearly equal halves, 50% are between the ages of 40-65 and 47% over 66 (including a sizable group over 80); representing the earlier side or preparation for retirement and those who have settled into that lifestyle.

The 2.5% of respondents reporting to be under 40 years of age is an important consideration for a community, particularly if this is representative of the overall city. The needs and desires, as well as the benefits to a community of a younger population differ in many ways from a more mature population.

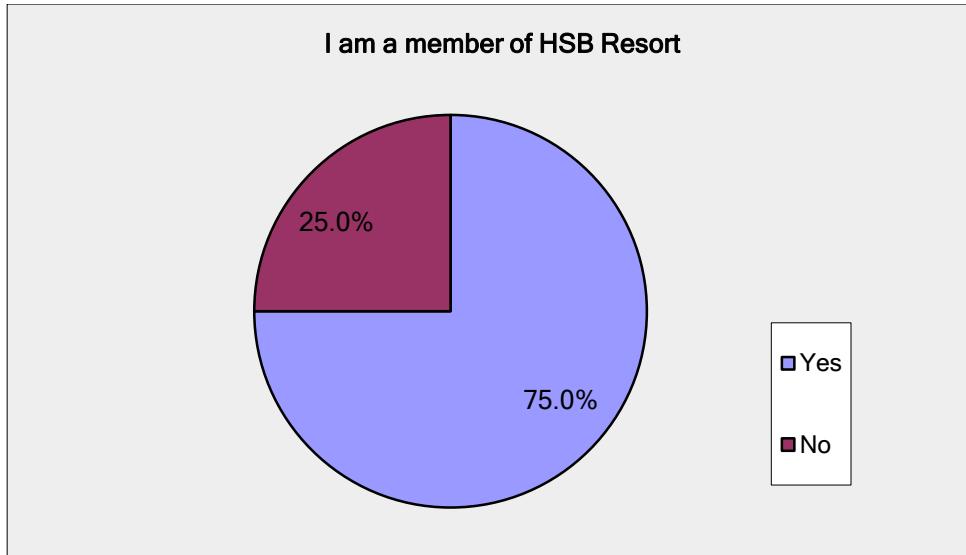


Question 13

The final demographic type question shows that one quarter of all respondents are not HSB Resort members at this time. There were a large number of comments regarding the HSB Resort in response to Question 14, both favorable and less so, but which show that membership does have an effect on other results in this report.

Citizens' relationship to the resort may be significant in terms of their satisfaction/discontent with the Resort management, how that spills over into their perspective of the City Government, and more importantly, confusion between these two entities and their roles in the community.

Graph 7



In final analysis, it was determined that the most important of these filtering fields would be "Full-time" residents, "Part-time" residents (all combined), "Primary residence less than 10 years," "Primary residence more than 10 years," "Age group 55 and under," "Age group 56-74," and "Age group 75 and over." "Resort membership - Yes" and "Resort membership - No" filters were also frequently employed. The filtered information appears in the Data Tables section of this report.

PLANNING QUESTION RESULTS

Questions #6, and #8 through #12 were designed to solicit information directly related to planning.

These questions included:

Question 6 Reason for choosing HSB

Question 8 Level of need for high speed internet

Question 9 Level of support for pre-selected ideas for the future

Question 10 Level of support for HSB growth

Question 11 Selection of bond pay-back method

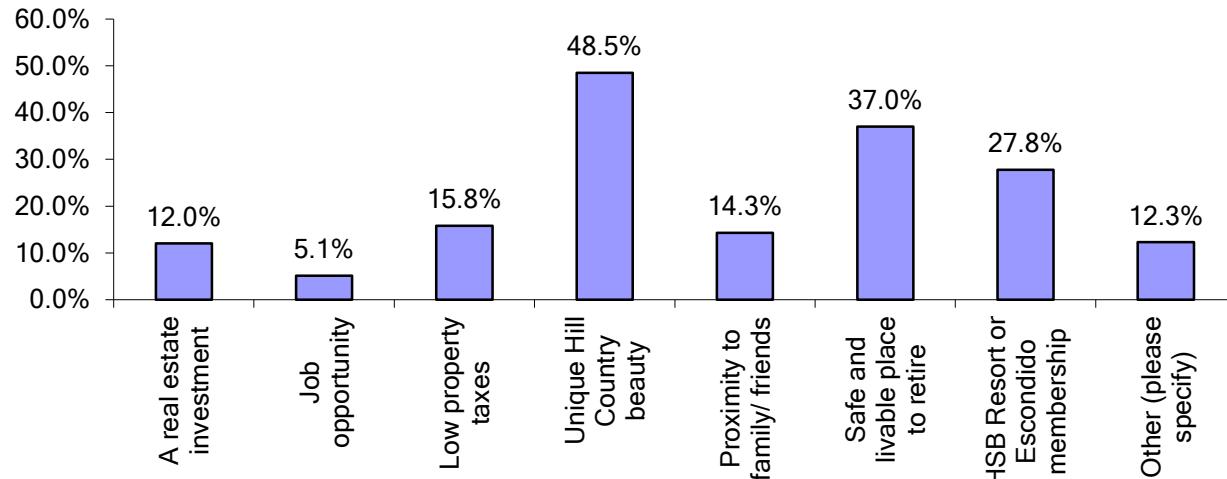
Question 12 Level of improvement needed for specific spaces

Question 6

Overwhelmingly, respondents report choosing HSB because of the unique Hill County beauty, and this is true across all filter groups (see Table 6 for greater detail). Being a "Safe and livable place to retire" was ranked second, over all filter groups except the Part-Time respondents and the Under 55 set who ranked "HSB or Escondido membership" as their second highest ranking, which was third among most other filter groups. In the "Other" option, across all filter groups, "Lake" and "Golf" were top responses. These top rankings may be significant to planning efforts for the future and certainly are reflected in other portions of the survey, including the open-ended comments submitted under Question 14.

Graph 8

When I chose HSB, my most important reasons were (select your top 2)

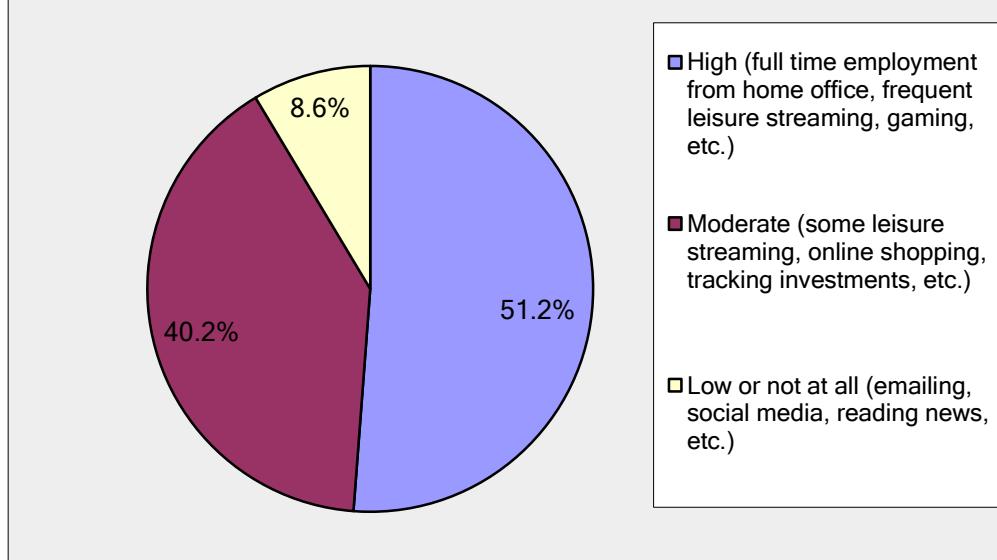


Question 8

Living, playing or working in the natural beauty of the Texas Hill Country does present challenges in remaining connected to the technology that is so a part of our world. With the prior belief that HSB was a retirement community, it was important for the LRPC to gain an understanding of the real need/desire for technology improvements. 91.4% of all respondents reported "High" or "Moderate" need for high speed internet access. Perhaps the most interesting result was that within the 75 and Older group, 52.9% reported a "Moderate" need and nearly 30% have a "High" need for this service. See Table 8 for greater detail.

Graph 9

My need for high speed internet access is



Question 9

This was the most important question in the survey since it asked respondents to react to various future directions for the city on 19 different subjects. They were asked if their support was “Very Strong”, “Somewhat Strong”, “Not Very Strong” and “Not at all Strong”. It was a forced positive or negative rating with no mid-point (no “riding the fence” allowed). The Ideas/Options were created by the LRPC following initial stakeholder interviews as a way of putting structure around the many possibilities for future direction and to spur more conversation or creative alternatives which could be expressed in the open-ended question #14 or in later planned Town Hall meetings.

Graph 10 displays the results for all respondents. The “Total Positive” column is the simple addition of the “Very Strong” and “Somewhat Strong” responses while the “Total Negative” column is the addition of the “Not very Strong” and “Not at all Strong” responses even though “Not Very Strong” really isn’t a true negative. These responses were used to rank the 19 subjects. The relative differences in strength of conviction are obvious as “Total Positives” ranged from 83.99% to 30.17% between subjects and “Total Negative” from 16.01% to 69.84%.

The overall rankings did not vary my much across the filter groups (resident versus non-resident, age, etc.); at most, they were within 1-3 ranks within each option.

Clearly, the community’s concern for protecting the environment was evident – “*Cooperating with City, LCRA and other regulatory agencies to protect Lake LBJ from pollution, waterweeds, milfoil and other environmental threats*” was ranked #1 by All Respondents and no lower than 3rd across all filter groups. This is not an unusual outcome based on Question 6 results that show the community’s high appreciation of the *natural beauty* of HSB. See Table 9 for filter group details (There are several statistical ties which appear as duplicate rankings).

Ranked #2 by All Respondents, “*Continuing improvement of roads and adding a center turn lane on 2147*” ranked high across all filter groups except the Part-Time Residents (#6), perhaps because they don’t use the roads on a regular basis.

Ranked #3 by All Respondents, “*Enhancing technology infrastructure to optimize future technological advances in internet, cellular and wireless coverage*” and the same by most filter groups except the Over 75 group. Interestingly, however, is that while not #3, this group did rank technology enhancement as their #5, supporting the result in Question 8.

Of the next six ranked Idea/Options, all but one related to environmental issues or outdoor activities. Further supporting the depth of concern this community has for preserving or enhancing the natural surroundings of HSB. The Under 55 group was particularly more interested in “*Developing additional land for public parks, hiking trails and other outdoor recreational activities*” Idea/Option, likely due to being at a physically active life stage.

The Idea/Option within these six which did not relate to the environment specifically (although perhaps peripherally) is “*Encouraging retail/commercial development consistent with community and architectural standards.*” While in the top third of rankings by All Respondents, there was little

agreement across individual filter groups. For example, this ranked 5th among Part-Time Resident respondents, 7th among Full Time Resident respondents and 9th among the Over 75 age group of respondents. Comments provided in response to Question 14, which may apply to this level of variation, speak to differences in the perception of what “*retail/commercial development*” means and concerns over “architectural standards” in terms of governing and enforcing such standards. A good deal of the comments support (or strongly desire) more dining and boutique retail development and less of other types of commercial offerings. There are several comments indicating current systems which approve commercial development and reflect a lack of consensus around what architecture style or kind of business is acceptable for HSB. The growth of retail/commercial development bears much more research and discussion.

Other Ideas/Options that had general agreement in ranking, and interesting variation by filter group included:

- #10 “*Developing a plan for independent living, assisted living and nursing care facilities*” - Perhaps expected, with each older age group, the desirability of this option appeared 4-5 rankings higher, likely to allow them to remain in HSB throughout their lives as that decision draws more near (Under 55 group ranked #16, 55-74 group ranked #10 and Over 75 group ranked #6).
- #11 “*Enhancing the road, sewer, water infrastructure to increase marketability of undeveloped lots thru public/private partnerships*” - The younger and newer residents seem to desire more enhancements to infrastructure (Under 55 group ranked #9, Primary Residence Less than 10 Years group ranked #11).
- #16 “*Forming a historical society to preserve HSB history*” - Not surprisingly, the Over 75 group holds a higher regard for preserving history and honoring the past.
- #18 “*Establishing an array of community transportation options between HSB and other TX cities for shopping, cultural events or personal needs*” – It is not unusual to find that the 75 and over group, likely who are driving less, would rate this option for mobility and independence higher than other groups (#15)
- #19 “*Seeking partnership with private school(s) to attract families with young children to HSB*” – Likewise, it is not unusual that the Under 55 group rated this option higher than any other group (#14).

It is also worth highlighting the results to Idea/Option #17 “*Devoting City resources to promoting HSB Resort amenities as a visitor destination.*” This Idea/Option was very controversial, ranking as high as 12th among Part Time Resident respondents and 13th by the Under 55 respondents, to as low as 19th (or dead last) among Full Time Resident respondents. The comments found in responses to Question 14 seem to reveal a current high level of discontent with the HSB Resort (ownership, management, maintenance, etc.). The Part Time respondents, 81% of which are Resort members and who reported a higher percentage choosing HSB because of the Resort (see Question 6 and

Table 9), may have a more positive view of the Resort and its relationship to the City since they are more removed from the day to day operations or issues of both.

More detailed analysis of the Full Time Resident respondents, and Part Time respondents by percentage agreement and disagreement can be found in Tables 9B and 9C in the Data Tables section of this report.

The data gathered from this question may be the most valuable information from the survey for the LRPC considerations and decision making in long range planning recommendations.

Graph 10
Question 9 Idea Support: All Respondents Ranking by Percentage

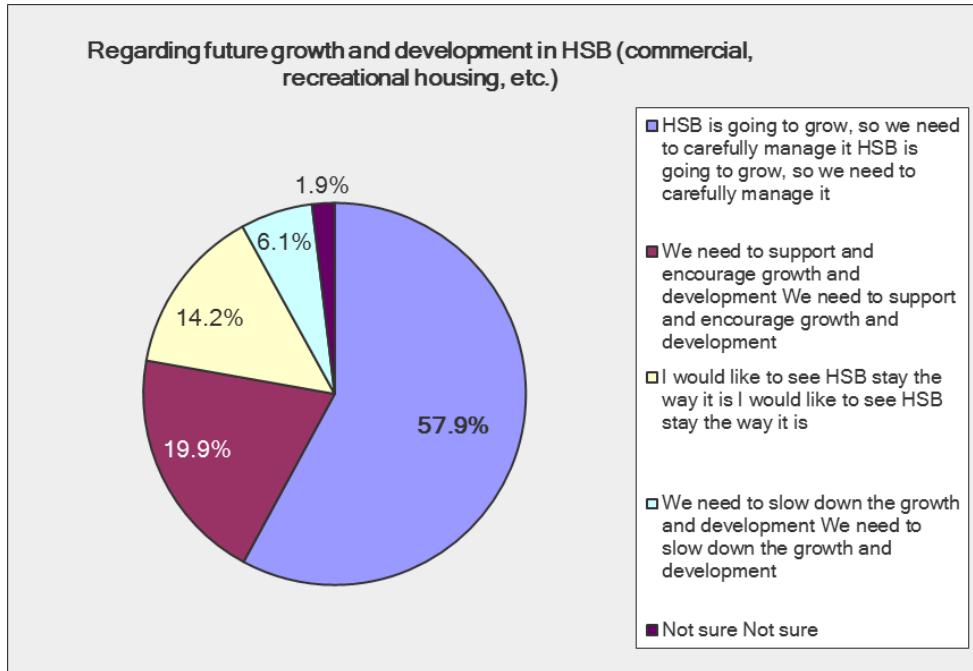
All Respondents	Total Positive	Very strongly	Somewhat strongly	RANK	Not very strongly	Not at all	Total Negative
Cooperating with City, LCRA and other regulatory agencies to protect Lake LBJ from pollution, waterweeds, milfoil and other environmental threats	83.99%	59.56%	24.43%	1	5.95%	10.07%	16.02%
Enhancing technology infrastructure to optimize future technological advances in internet, cellular and wireless coverage	81.27%	57.45%	23.82%	2	7.09%	11.63%	18.72%
Continuing improvement of roads and adding a center turn lane on 2147	79.92%	49.08%	30.84%	3	8.13%	11.95%	20.08%
Focusing on long term water availability strategies	79.84%	47.01%	32.83%	4	15.78%	4.38%	20.16%
Focusing on protecting and preserving the Live Oak tree population	73.62%	38.20%	35.42%	5	13.19%	13.19%	26.38%
Encouraging retail/commercial development consistent with community and architectural standards	68.21%	33.55%	34.66%	6	15.70%	16.10%	31.80%
Becoming the leader in environmental stewardship in the HSB area (i.e. recycling efforts, water conservation)	67.83%	36.46%	31.37%	7	15.92%	16.24%	32.16%
Establishing standards and information sources for xeriscaping and other water conservation efforts	64.74%	26.91%	37.83%	8	20.80%	14.46%	35.26%
Developing additional land for public parks, hiking trails and other outdoor recreational activities	63.21%	28.81%	34.40%	9	20.11%	16.68%	36.79%

Developing a plan for independent living, assisted living and nursing care facilities.	55.79%	16.92%	38.87%	10	25.46%	18.75%	44.21%
Enhancing the road, sewer, water infrastructure to increase marketability of undeveloped lots thru public/private partnerships	52.24%	19.49%	32.75%	11	26.28%	21.49%	47.77%
Encouraging the formation of a HSB Chamber of Commerce to support local business development	48.52%	19.15%	29.37%	12	30.01%	21.47%	51.48%
Creating a public Information Center/ library that includes internet access, technology exchanges and reading rooms, as well as, providing social spaces and educational programming	45.36%	15.81%	29.55%	13	32.03%	22.60%	54.63%
Partnering with POAs (Property Owner Associations) and commercial partners to create recreational programs and events for the general public	40.83%	11.24%	29.59%	14	29.19%	29.98%	59.17%
Developing public lake access	35.88%	15.48%	20.40%	15	27.98%	36.13%	64.11%
Forming a historical society to preserve HSB history	33.68%	12.00%	21.68%	16	30.80%	35.52%	66.32%
Devoting City resources to promoting HSB Resort amenities as a visitor destination	32.67%	7.73%	24.94%	17	40.88%	26.45%	67.33%
Establishing an array of community transportation options between HSB and other TX cities for shopping, cultural events or personal needs	31.31%	10.65%	20.66%	18	32.99%	35.71%	68.70%
Seeking partnership with private school(s) to attract families with young children to HSB	29.68%	8.56%	21.12%	19	38.40%	31.92%	70.32%

Question 10

Considering the high concern for maintaining the environmental health of HSB and its natural beauty, it may be a surprise that overwhelmingly, respondents agreed that *"HSB is going to grow, so we need to carefully manage it"* both among All Respondents (57.9%) and across all filter groups. Indeed, stopping or slowing growth was rated below the 2nd most popular response of *"We need to support and encourage growth and development"* by All Respondents. Only the Over 75 group and Primary Residents over 10 Years placed *"I'd like to see HSB stay the same"* above *"Support and encourage growth."* See Table 13 for details. This seems to be a clear direction, but implementing a consensus of how to actually manage growth, may be a challenge.

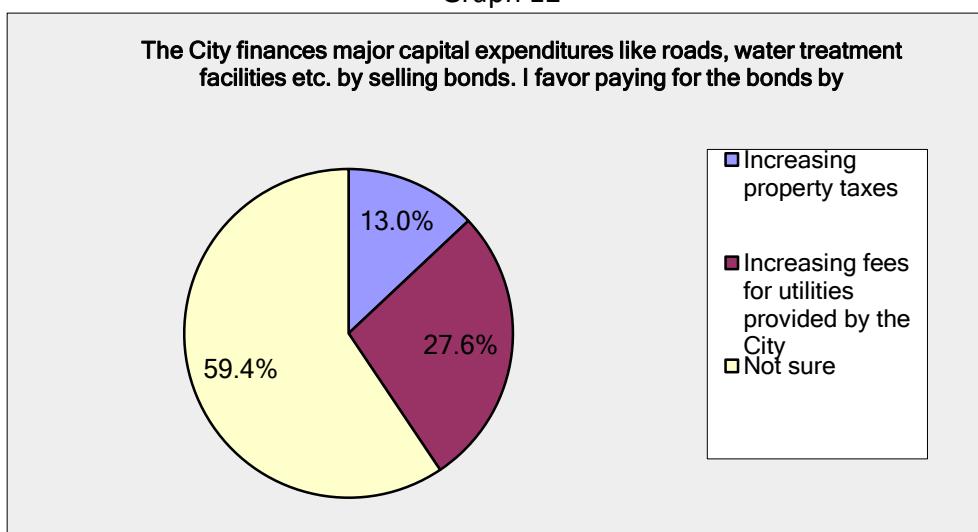
Graph 11



Question 11

The value of this question may lie in its ability to education survey participants on the issue of indebtedness and the difficult decisions that the City must make in this regard. The highly rated “Not sure” (59.4%) may indicate either that they don’t understand the issue, don’t know of other ways to pay back the bonds, or just don’t care for either of the listed choices. It is interesting, however, that 40.6% did choose to personally pay more in some way. The Part Time Resident respondents were much less interested in increasing property taxes as a way of paying for bonds (preferring utility fees, likely because they are not paying utilities year-round), whereas, the Full Time Resident respondents were more closely split between to two payback options (see Table 14 for more detail). Educating the HSB population on important issues that affect them is valuable take-away from this question.

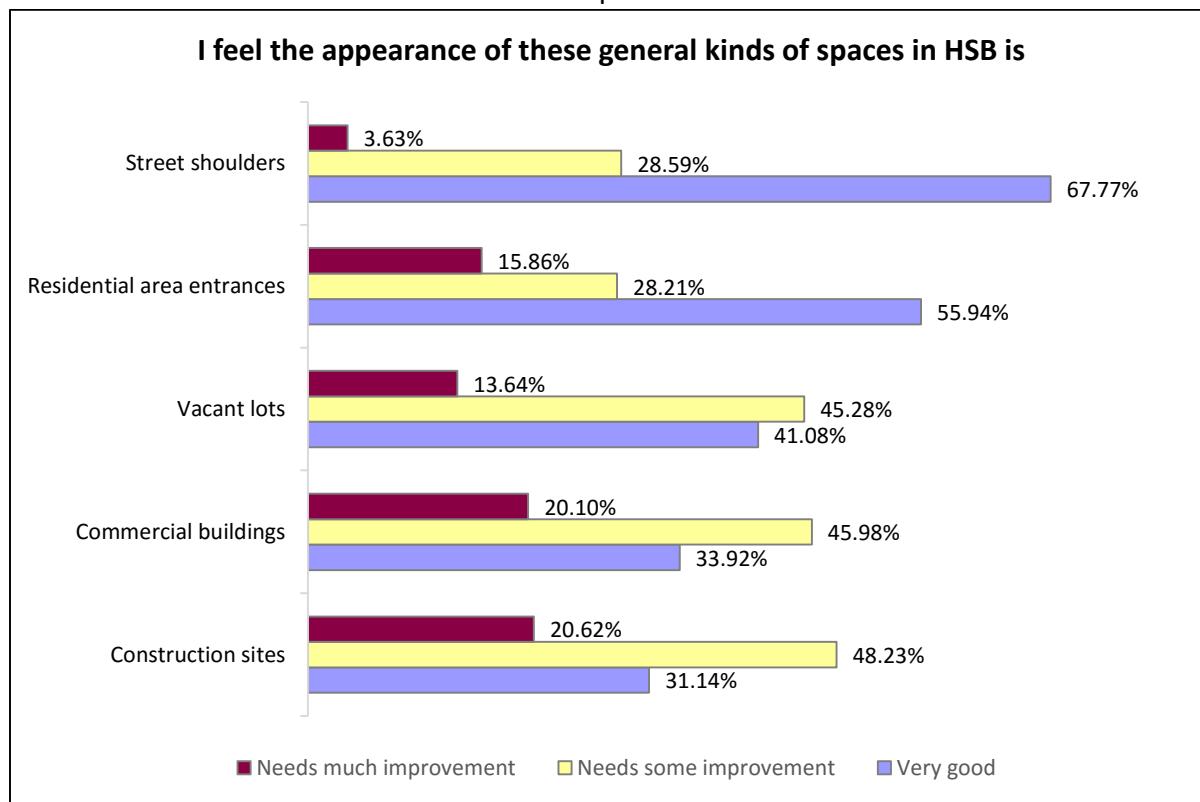
Graph 12



Question 12

In question 12, respondents were presented with types of spaces for which they could register their opinion of the general appearance of each on a scale of "Very Good" to "Needs Much Improvement." While not all within the direct control of the City, there is influence that the City can use to make improvements. There was little variation between the weighted averages of any spaces (only .53 from highest to lowest average). Generally, "Street Shoulders" and "Residential area entrances" rated most favorably viewed and "Commercial buildings" and "Construction sites" designated as needing most improvement. Greater detail can be found in Tables 14 and 15 in the Data Tables section of this report.

Graph 13

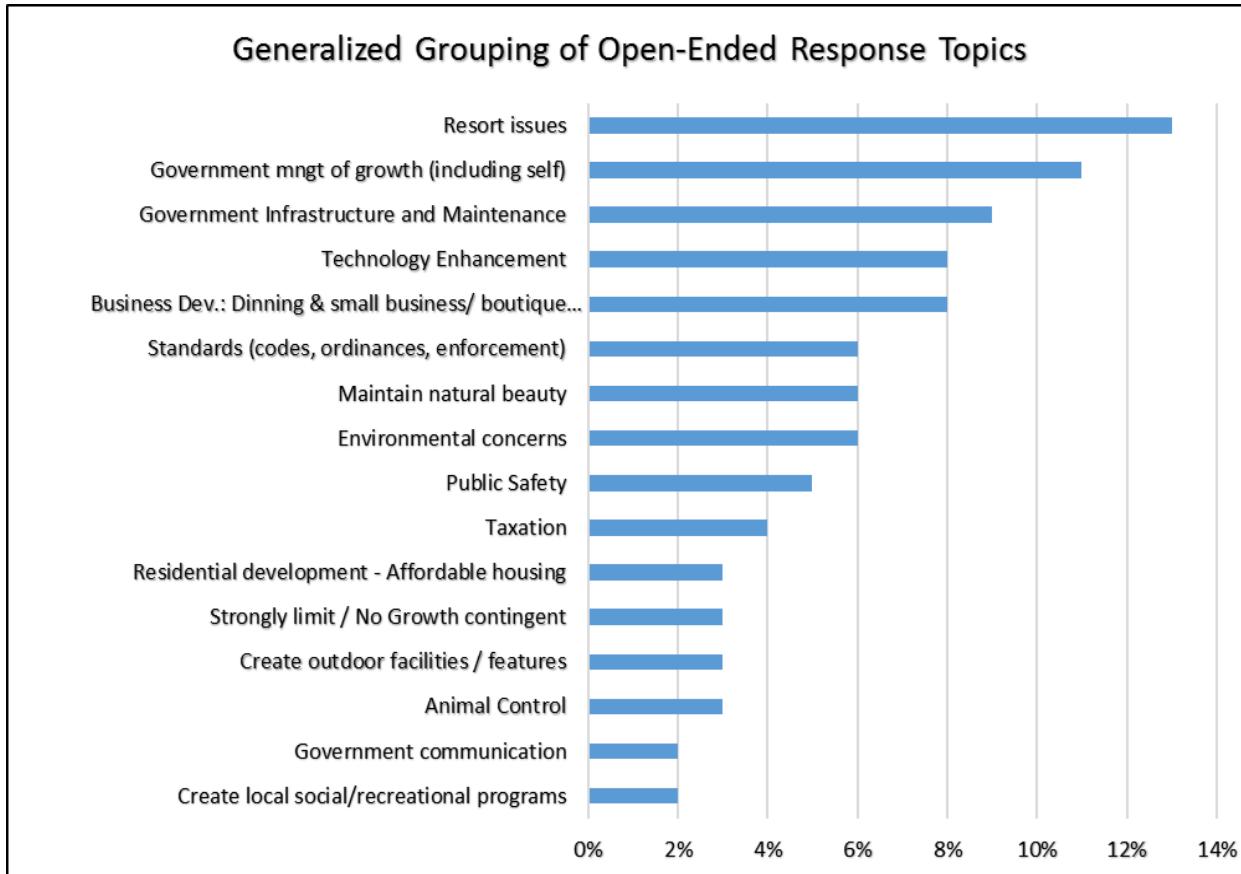


OPEN-ENDED QUESTION (Question 14) SUMMARY OF RESPONDENT COMMENTS

As an opportunity for respondents to include their own ideas in addition to the ratings and rankings they provided by other questions, Question 14 was designed as open-ended for a text response. 741 respondents took advantage of the opportunity to comment on "The single most important thing City government could do to make HSB a better place to live or play over the next 5-10 years is..." (not analyzed by filter group).

Many respondents provided multiple thoughts and most responses echoed choices registered in previous questions. Some themes emerged and appear in Graph 14. Few new ideas or options were presented, however, do provide some insight to the choices made in other areas of the survey. A few representative comments appear in each section of this analysis.

Graph 14



Beginning with the smaller areas of comment, creating local social/recreational programs separate from the Resort or as an option for non-resort members, was repeated theme.

“Many residents are dropping the Horseshoe Bay Resort due to occasional play and affordability. Can the city develop or work with HSB resort for a “residential” play fee...”

“Need more things to do here...42 dominos, bus trips to casinos, more social activities. Many new residents do not play golf, tennis.”

“More social things to do for people who live year round. We moved to Sun City because of a more active senior community.”

“We need to let others know this not just a resort destination but a full time community that enjoys many attributes, aside from the obvious ones.”

“We appreciate all the activities that are available and would benefit from a great online site or mobile app that listed as many of the activities as possible, not only the Resort activities, but events within the Highland Lakes area...”

Government communication was mentioned, both in regards to how the City provides information, as well as, is issue of listening to citizens and responding accordingly.

“Stay attentive to resident’s concerns or requests when they contact City Hall with any type of question! The manner in which their concerns or questions are answered is very important to HSB continued success in being a wonderful city in which to live.”

“Better communication to part time residents that own property as to construction, road work, etc.”

“Continue to strive for BETTER communication. What has happened in the last few months with new developments, proposed annexation has been very disappointing... Be honest and forthcoming and listen to the concerns of your citizens.”

“I am disappointed that the city staff and council have done such a poor job in truly communicating with the community and building consensus for new initiatives. ”

The topic of animal control when voiced, was passionate. While mostly encompassing management of the deer population, the issue of feral cats was also included. With the high emphasis on maintaining the natural beauty of the HSB area as expressed in other questions, it is no surprise that this issue is controversial. While a larger contingent seemed to agree that particularly deer population control is important, the City’s current method of animal control is in question.

“Continue to manage the Animal control population even though all can’t be satisfied.”

“Change the TTP process in dealing with the Animal control. It is in humane and quite disturbing to see the nets and possibly witness their terror. A sharp shooter or bow hunting would be a better alternative as well as sedating the does and sterilizing them. It is hard for me to be proud to live in a community where animals are treated with such cruelty. ”

“The City should enforce the Animal control feeding ordinance.”

“Better control of Animal control and feral cat population.”

“Take better care of our wildlife, the Animal control were here before we got here and if you didn’t like the Animal control why are you here?”

In addition to the creation of more social and recreational programs, mentioned before, specifically the creation of outdoor facilities or features was voiced. This supports the Question 9 Idea/Option *“Developing additional land for public parks, hiking trails and other outdoor recreational activities.”* These comments particularly suggested constructing facilities or purchasing equipment.

“Add exercise and stretching equipment along walking/running trail.”

“Definitely more hike & bike trails for increase in activities for elderly, parents and children or walking dog, a dog park perhaps or dog friendly park.”

"The city needs to have more access to the residents - not just the country club members. Such as - public access to lakes, parks, hiking trails, historical points, etc."

"Improve parks & trails, including mountain bike trails."

The "strongly limit or no growth contingent" was heard in the comments as in Question 10 responses regarding growth ("I would like to see HSB stay the way it is").

"I don't want any commercial growth whatsoever, but I assume you will ignore the no-growth proponents. Given this likelihood, please confine ALL commercial development to the 2147 corridor where it is already concentrated. We don't need this ugliness and traffic scattered throughout HSB and we certainly DO NOT want to open the flood gate of allowing greedy developers to install convenience stores on Highway 71."

"Do not promote growth. Growth will bring traffic, condos, apartments and change what HSB is all about. The area growth around HSB has already doubled the traffic on 2147 since 2014. It will most likely double again by 2018, even if we adopt a no growth initiative. We need to cherish the lifestyle and safety we now enjoy. We need wise leaders, not greedy people."

"This is a resort town and we need to manage the growth to ensure that we don't get a lot of rental properties and attract unwanted people living here. I moved here due to the resort amenities and the quiet lifestyle. Would prefer that we not try to attract families with kids or residents who won't maintain their properties to our current standard. Nor do I think that we should be attempting to develop a lot of commerce/businesses in HSB but keep it as a resort town."

"HSB has been a successful community for over 50 years by focusing on the retiree and second home owner (which eventually lead to retirement homes)...please keep it that way...feel like city wants us to be a Lakeway type community...that is what we do not want... growth, both residential and commercial, needs to be carefully managed by city with citizens/residents input,...people who live here... not developers, not realtors, not resort, not any other party with \$\$ interest...please listen to the people who are here and chose to be here because of what it is...a quiet retirement / get away destination in the Texas hill country, that happens to have a resort...please keep it that way! Seen many developers/ opportunist come in, mess it up, then leave it for us to clean up...STOP"

"Please do not get all caught up in development. The area will probably grow, but the city needs to make sure that growth is not at the expense of the quiet, country atmosphere that has drawn people to the area."

An Idea/Option not asked in the survey, but which appeared in the comments were issues of affordable housing from differing perspectives.

“Facilitate affordable housing for retirees by reducing / altering minimum housing sizes.”
(From a non-resident)

“To plan for a more rounded populace to include and encourage affordable housing for those working in the service and hospitality industries so that we can attract longer term and higher quality workers.”

“Focus on keeping up the infrastructure, keeping property taxes low & not building apartments & high density housing. This usually indicates that the area is in economic slowdown & needs additional homes for the added income stream. High density housing usually creates more crime because many of these properties become rentals with tenants that do not value the home nor the area in which they live.

“Keep in mind that this is a retirement community and the property owners own housing in HSB because it is quiet, the natural beauty, low crime, the responsive police force, and the activities available for both seniors and younger extended family members who visit. We need to keep taxes low governmental over site at a minimum. We are not property owners that need schools! We do not need low income housing which will invite an increase in crime. Property owners are not there to subsidize the resort, or any private developers”

“My fear over the next 5-10 years there will be no housing for the people who work here to live... This is a resort community and we need to keep an eye on affordable housing (doesn't have to be in Horseshoe Bay) But Fredericksburg and Marble Falls are running into this problem. (From a non-resident)

“Slow down development of multi-family housing.”

While taxation was mentioned peripherally in the survey (Questions 6 & 11), several comments were made regarding lowering taxes, using tax funds wisely or increasing business/sales taxes.

“Play fair with Business's that are trying to provide Business Development Services to our city by bringing in sales Tax and other revenue to keep Taxes Down, and Prices down, and to bring some fair competition to a city that is in great need of.”

“Manage growth and keep taxes low.”

“What we need to grow our tax base and keep the area thriving is young families who intend to be here for a long time...”

“lower property taxes to make it more affordable to retire at hsb.”

“City government should live within its financial means, focusing on requisite infrastructure and essential basic services, and not expect residents and/or taxpayers to pay for bloated bureaucracies and wasteful spending.”

“Considerer adding a hotel tax. The Resort visitors use our roads and infra-structure without helping pay for them. While the Resort makes a profit from the tourists, the City does not.”

Generally, the City's public safety departments and programs are favorably viewed. This is additionally seen in responses to Question 6 regarding respondent's choice to live in HSB because of it being a safe and livable place to retire. There is concern, however, regarding increase traffic and safety issues that arise with growth. There were several comments/compliments to City government and its employees.

“I would like to take a moment to praise the police force in Horseshoe Bay. The officers do a fabulous job of patrolling Lighthouse drive and are always so friendly and easily approachable. Your service is greatly appreciated! Thank you!”

“We love HSB and the City staff, police and fire as well as all the amenities supplied here in this great community. Keep up the great work as it is a beautiful and well managed community.”

“I would hope that the wonderful police, fire & EMS departments would continue their great service to our community in the years to come.”

“Continue to strongly support and enhance public safety capabilities, equipment needs, and provide appropriate incentive to recruit and retain high-quality staff.”

“My first thought is safety; we have exceptional officers and fireman, make sure they are compensated by pay and insurance.”

“Policing the area during the busy season I have noticed a large influx of undesirables over the summers that are fully aware of the luxury amenities we enjoy. It won't be long before we start to worry about security and responsible ownership. The police are more important than we really care to admit. Support them.”

“The personnel in all our various departments are most pleasant and do a super job... police, fire and water...all do a great job.”

“I want to thank the City for keeping control of our speeders on 2147. The Police Department does a great job on monitoring this.”

“Continue to keep us safe with our wonderful Police Dept. and Fire Dept.”

“I do believe the vehicle traffic, crime and drug use will increase as the population grows in the area, even if they are seasonal visitors. I hope that there will be continued police patrols and that this will increase, and not decrease due to future improvements in the HSB area.”

The next three themes, each representing approximately 6% of the responses to Question 14, seem to be interrelated but with an emphasis worth delineating: Environmental concerns, Maintain

natural beauty and Standards (codes, ordinances, enforcement). Certainly, from the broad support for the environment and natural surroundings found throughout this survey, this area would generate a number of comments.

Environmental concerns included specific programs of protection and waste management that the City can (or does) directly engage such as recycling, invasive vegetation, and water conservation.

“Please start Recycling!!! At least Paper, Cardboard, Plastic & Al. Please start picking up beer cans, bottles & paper along the roadsides!”

“Maintain great services INCLUDING RECYCLING pickup. It is disgraceful the city does not provide this service. No light pollution but a 60s view toward recycling... IT WILL PAY FOR ITSELF with a little creative thinking and using available grant funds.”

“Take a leadership role in the MILFOIL situation which currently is left up to individual homeowners and affects all water-related sporting/boating activities and commensurate expenses rating to this unattended responsibility!!!”

“1. Strive to encourage natural xeriscaping and minimalist landscaping on lots in order to conserve water. 2. Work with residents to store rainwater for use on landscapes.”

Maintaining the natural beauty of an area is a much more difficult issue to define in terms of what the City can do to satisfy this desire while managing growth.

“Maintain the quiet, peaceful living environment while promoting economic development and convenient Business Development and service business.”

“Please do not over commercialize the area, that's a big part of the beauty of it!”

“The area will probably grow, but the city needs to make sure that growth is not at the expense of the quiet, country atmosphere that has drawn people to the area.”

The issue of architectural standards, development ordinances and enforcement, may have the greatest impact on the desire for keeping a natural feel to the area, but comments indicate there are also many challenges.

“Not everything has to be strictly regulated, controlled, and made to look picture perfect...”

“Manage the growth and maintain the architectural and enforcement standards”

“Insure that residential growth and expansion is keeping with the standards that current HSB residences and property owners currently expect. Want to make sure that we keep the exclusive “feel” of all parts of HSB.”

“Need rules that are real and livable that encourage home improvement. Parking is very difficult and discourages visitors. I would love to see the city maintain the areas that made HSB special to start with.”

“Change architectural and ordnance restrictions, provide free workshops and expertise and possible subsidization to encourage private residence owners to invest in hidden, low profile water catchment devices and solar energy devices that could supplement public utility usage. More importantly such devices would be available in the event of a catastrophic emergency that knocks out public utility services. Such ordnance changes could also be a boost for real estate sales.”

Where business development garnered specific input, the direction was clear: restaurants and fine dining establishments. Other desired businesses included boutique shopping options and business service firms. From the large response in Question 8 or increasing high speed internet likely for home offices and remote work, firms that cater to small and independent business people may be indicated. Managing inevitable growth and development was the most popular choice of respondents in Question 10, and the number of comments around this issue support that outcome.

“We need more family friendly restaurants...”

“Need a couple more bars, restaurants, and those type places in walking distance.”

“Facilitate the development of a well-planned complex of small shops and services in HSB to provide more options for visitors to do as well as provide more home-town shopping options. This will increase the number of visitors and tourists coming through to eat which will allow more new restaurants to come in and survive. The additional sales tax and property taxes will help keep our property tax low.”

“Encourage restaurants, shops/boutiques and art galleries. This will bring people to HSB and the resort which will result in excellent lifestyle for residents and bring in tax revenue for the city.”

“Foster growth of business that would provide nicer shopping opportunities for travelers & residents of the HSB lifestyle. Marble Falls shopping with the exception of a few stores, is marginal and suited for lower middle and low income families. I'd like to see more unique, boutiques, swimwear, clothing, golfing that would be fun for residents and travelers to the resort.”

“Also, would love to see growth opportunities for restaurants in the area, very little out here and it's frustrating to have to go all the way in to Marble Falls for dinner.”

“Encourage development of resources that will improve the way we live and play, and that decrease our reliability on neighboring communities.”

“Encourage additional Business Development so folks keep their money in HSB and reduce driving distance for residence.”

Technology enhancement, as overwhelmingly desired in responses to Question 8, was supported by many comments in Question 14.

“Encourage Technology businesses to increase capital investment and offer more citizens more high speed Technology choices.”

“Invest in technology infrastructure and availability.”

“Develop plans to bring high speed Technology service to the area. If the service stays as bad as it is, it will deter younger people from moving here and keep others who need to work from home from doing so. This is the most inconvenient thing about living in HSB!”

Supporting the #2 Idea/Option in Question 9, comments indicate respondents care about the roads, infrastructure and maintenance of public area in HSB. With approximately 9% of the responses in Question 14, citizens want the City to keep this a priority.

“Make sure that the infrastructure of roads, sewers, etc. are kept maintained...”

“Sidewalks”

“Maintain infrastructures (roads, underground electric distribution, Technology). Work with LCRA to put 138 kv transmission underground or in gas insulated bus.”

“Maintain roads and utility infrastructure.”

“Continue the street paving.”

“Continue road development for lesser house density areas that are primary arterial roadways and connectors, for example, High Mesa from Western Bit to Airport.”

“Keep empty lots cleared and well-groomed so overall appearance of our community is attractive.”

“Please repair or remove cedar fences...”

Like in Question 10, respondents desire the managed growth of HSB. The comments here indicate a desire for “slow,” “conservative,” and “careful” development, but additionally, a concern for City government to manage its own growth in size and bureaucracy.

“Maintain what we've got and control reasonable growth. Be very, very cautious of making zoning changes.”

“Encourage reasonable growth without hindrances. Keep government small.”

“Keep government small and efficient. Be conservative keep operating expenses and benefits low.”

“Government needs to do LESS not more.”

“Continue the efficient supply of City services (Police, Fire, Water, Waste Water treatment, Animal control) while supporting growth without financial support to developers and builders.

“Careful financial planning and management to avoid debt.”

“City government needs to stop trying to do so much. Tell people NO sometimes.”

Finally, although the open ended question stated “The single most important thing City government could do to make HSB a better place to live or play over the next 5-10 years is” many respondents choose to make a variety of comments about the Resort. Although the Resort is the single most important economic and social entity in the City, this was not a part of the committees’ solicited research, so these comments are not included in this report. Should interested parties wish to see these comments, they are available on request at City Hall.

METHODOLOGY

The methodology for this survey puts the design, dissemination and collection in context and provides a framework for understanding results.

The LRPC incorporated several systems of research to access broad input from the citizenry to inform their recommendations which included: individual stakeholder interviews, an open community survey, and two town hall meetings. The Community Survey served as the bridge between the other two systems. With the stakeholder interview results as a base of information and in partnership with Breland Facilitation, the LRPC designed the survey instrument. It was determined that an electronic survey would be the appropriate vehicle as the HSB community has a very high percentage of profession/retired professional population that could be best reached by email. To ensure the broadest accessibility possible, however, an identical paper survey was also created for those who may not be connected or comfortable with technology.

The electronic survey link to SurveyMonkey.com, was embedded on the City’s website, prominently on the homepage and opened February 28, 2016. An e-blast to the City’s list of citizen email addresses was sent. Additionally, local POA’s and the HSB Resort sent the link to all of their members with email addresses. A story was produced in the HSB Beacon, directing citizens to the City’s website survey link and provided the locations where paper surveys could be picked up and deposited when complete.

The survey remained open through April 18. A total of 1369 responses were collected by the close date (1,312 via electronic instrument, 57 via paper version). The data from the paper surveys were manually entered into the electronic tool so that those results were seamlessly included in analysis.

A preliminary analysis was provided April 11th to allow the LRPC with information needed to develop questions and talking points for their upcoming Town Hall Meetings. Once closed, the final analysis report was created.

DATA TABLES WITH FILTERS

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Table 13 Question 10 Desire for Future Growth

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Table 15 Question 12:A Appearance of Public Spaces by Weighted Average

Table 16 Question 12:B Appearance of Public Spaces by Percentage

Table 17 Question 13 Resort Membership

Table 1 Question 1 Primary HSB Residence Location

Question 1 Respondent primary HSB Residence Location		Report based on 1369 Responses received through 04/18/16						
Number of Respondents per category	1357	930	342	217	925	203	620	435
	All	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary	Primary Res >10
Escondido	3.8%	3.7%	5.0%	5.1%	4.1%	0.5%	6.0%	1.8%
Horseshoe Bay Proper	38.7%	42.4%	36.0%	35.0%	36.4%	53.2%	38.4%	48.0%
HSB South/Uplands	3.8%	5.2%	0.9%	7.8%	3.1%	3.0%	5.0%	4.4%
HSB West, Applehead, Applehead Island, Bay County, Pecan Creek, Quail Ridge, Sienna Creek, The Hills	31.1%	37.3%	20.2%	18.9%	34.2%	30.5%	38.5%	34.5%
Summit Rock	1.9%	2.5%	0.9%	1.4%	2.2%	1.5%	1.9%	2.8%
The Trails	3.9%	4.8%	2.3%	2.8%	4.9%	1.0%	4.8%	4.1%
Another location within HSB City limits	1.1%	1.1%	1.5%	1.8%	1.0%	1.0%	1.6%	0.7%
Outside the HSB City Limits, please specify	15.7%	3.1%	33.3%	27.2%	14.2%	9.4%	3.7%	3.7%
	100.0%	100.1%	100.1%	100.0%	100.1%	100.1%	99.9%	100.0%
Other includes:								
Austin Area	26	12.3%						
Central Texas Area	5	2.4%						
DFW Area	33	15.6%						
HSB Area	44	20.8%						
Houston Area	27	12.7%						
San Antonio Area	41	19.3%						
West Texas	17	8.0%						
Out of State	13	6.1%						
Other	6	2.8%						
Total	212	100.0%						

A report was run for the total group of respondents (All) and for selected categories or respondent groups (Full time, All Part time, Age<55, etc.).

Additionally, since respondents were able to skip most questions, the number of respondents across the categories will NOT add up neatly to the "All" values as you might expect.

Numbers in each column are the percentage of the total number of respondents in that category, not of All respondents. For example, adding numbers in the Full time and Part time columns will NOT equal the percentages in the All column.

Due to rounding and number of decimal places, percentages may not always equal 100%.

Table 2 Question 2 Years HSB Primary Residence

Question 2 Respondent length of time in HSB primary residency										
Number of Respondents per category	1369	934	348	221	930	205	623	437	959	320
	All	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10	Resort Yes	Resort No
Less than 5 years	25.5%	30.7%	17.2%	36.7%	26.8%	8.3%	56.0%	0.0%	23.8%	33.1%
6 - 10 years	20.0%	26.3%	7.8%	15.4%	22.8%	13.7%	44.0%	0.0%	20.2%	19.4%
11 - 20 years	22.8%	29.9%	8.6%	8.6%	22.9%	37.1%	0.0%	71.4%	24.8%	16.6%
Over 20 years	9.1%	13.0%	0.9%	0.5%	6.2%	32.2%	0.0%	28.6%	9.2%	8.8%
Not my primary residence	22.6%	0.1%	65.5%	38.9%	21.3%	8.8%	0.0%	0.0%	22.0%	22.2%
	100.0%	100.0%	100.0%	100.1%	100.0%	100.1%	100.0%	100.0%	100.0%	100.1%

Table 3 Question 3 Full time / Part Time Residency

Question 3 Respondent type of residency (full time / part time)								
Number of Respondents per category	1369	221	930	205	623	437	959	320
	All	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10	Resort Yes	Resort No
Full time	68.2%	49.3%	68.9%	86.8%	85.6%	91.5%	69.1%	67.8%
Part Time Seasonally	7.7%	5.9%	8.7%	4.4%	7.7%	4.3%	7.9%	6.9%
Part Time Vacations	17.8%	35.3%	16.3%	4.9%	6.3%	3.2%	19.5%	12.2%
Do not live in HSB	6.4%	9.5%	6.0%	3.9%	0.5%	0.9%	3.4%	13.1%
	100.1%	100.0%	99.9%	100.0%	100.1%	99.9%	99.9%	100.0%

Table 4 Question 4 Type of Domicile

Question 4 Respondent type of domicile								
Number of Respondents per category	1363	931	345	220	928	203	620	436
	All	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
Single family home	80.7%	91.7%	69.3%	65.9%	82.7%	88.7%	88.1%	92.9%
Multi-unit condominium / townhome	12.6%	7.2%	29.9%	23.2%	11.0%	8.4%	10.5%	6.2%
Apartment	0.1%	0.0%	0.3%	0.0%	0.1%	0.0%	0.2%	0.0%
Mobile home	0.7%	1.1%	0.0%	2.3%	0.5%	0.0%	1.1%	0.7%
I don't live in Horseshoe Bay at this time	5.9%	0.0%	0.6%	8.6%	5.7%	3.0%	0.2%	0.2%
	100.0%	100.0%	100.1%	100.0%	100.0%	100.1%	100.1%	100.0%

Table 5 Question 5 Years Property Ownership

Question 5 Respondent time of property ownership								
Number of Respondents per category	1350	925	341	221	925	204	617	433
	All	Full Time	All Part Time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
Less than 5 years	24.6%	22.4%	33.4%	44.8%	23.7%	6.9%	40.5%	0.5%
6 - 10 years	25.7%	24.5%	29.6%	27.1%	28.1%	13.2%	40.0%	2.8%
11 - 20 years	29.1%	31.7%	24.0%	18.1%	31.8%	28.9%	12.3%	58.0%
Over 20 years	17.9%	20.2%	12.0%	4.1%	14.1%	50.5%	5.5%	38.1%
I do not own property in HSB	2.7%	1.2%	0.9%	5.9%	2.4%	0.5%	1.6%	0.7%
	100.0%	100.0%	99.9%	100.0%	100.1%	100.0%	99.9%	100.1%

Table 6 Question 6 Reason for Choosing HSB

Number of Respondents per category		1345	R	A	N	923	343	219	926	200	618	430	952	319	
		All	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res	<10	>10	Primary Res	>10	Resort Yes	Resort No	
Unique Hill Country beauty	48.5%	1	45.7%	57.1%	43.8%	49.4%	49.5%	46.3%	46.3%	46.3%	46.3%	45.8%	55.8%		
Safe and livable place to retire	37.0%	2	40.5%	30.0%	21.0%	38.1%	49.5%	39.0%	42.1%	34.3%	42.1%	34.3%	45.8%		
HSB Resort or Escondido membership	27.8%	3	23.7%	38.5%	27.4%	27.3%	30.5%	25.4%	24.2%	24.2%	25.4%	24.2%	32.6%	13.5%	
Low property taxes	15.8%	4	21.2%	2.9%	23.7%	15.6%	8.0%	19.6%	18.6%	18.6%	19.6%	19.1%	8.8%		
Proximity to family/friends	14.3%	5	15.1%	13.7%	12.8%	13.7%	19.0%	15.5%	13.0%	13.0%	13.0%	13.4%	16.9%		
Other (see below)	12.3%	6	10.6%	16.3%	13.2%	12.2%	11.5%	9.5%	12.1%	12.1%	11.5%	11.0%	16.0%		
A real estate investment	12.0%	7	6.9%	19.0%	22.4%	10.7%	7.0%	9.5%	7.0%	7.0%	9.5%	7.7%	9.7%	18.2%	
Job opportunity	5.1%	8	6.8%	0.6%	9.1%	5.0%	1.0%	6.1%	6.1%	6.1%	6.1%	6.0%	4.3%	6.0%	
Other includes:															
Lake	44%		34%		57%		58%		45%		45%		21%		
Golf	22%		23%		20%		16%		20%		20%		38%		
Airport availability	4%		5%		3%		0%		5%		5%		4%		
Proximity to work	3%		5%		0%		0%		4%		4%		0%		
Vacation spot	7%		0%		12%		6%		4%		4%		8%		
Other (beauty, safety, wildlife, weather, retirement)	21%		34%		8%		19%		21%		21%		29%		

Table 7 Question 7 Age Group

Question 7 Respondent Age Group							
Number of Respondents per category	1356	928	343	621	433	959	320
	All Avg	Full time	All Part-time	Primary Res <10	Primary Res >10	Resort Yes	Resort No
Under 40	2.5%	2.5%	2.9%	3.5%	0.7%	2.7%	2.2%
41-55	13.8%	9.3%	23.6%	15.0%	3.9%	14.5%	12.5%
56-65	36.3%	32.3%	46.6%	44.6%	18.7%	35.8%	35.9%
66-74	32.3%	36.7%	21.3%	29.6%	43.9%	31.6%	34.4%
75-80	9.9%	12.5%	3.5%	4.8%	21.0%	10.5%	8.4%
Over 80	5.2%	6.7%	2.0%	2.4%	11.8%	4.9%	6.6%
	100.0%	100.0%	99.9%	99.9%	100.0%	100.0%	100.0%
Median age group	56-65	66-74	56-65	56-65	66-74	56-65	56-65
Estimated median age	64	66	60				

Table 8 Question 8 Need for High Speed Internet

Question 8 Need for high speed internet access								
Number of Respondents per category	1347	922	341	218	925	204	617	430
	All	Full Time	All Part Time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
High (full time employment from home office, frequent leisure streaming, gaming, etc.)	51.2%	47.2%	58.1%	59.2%	54.2%	28.9%	54.6%	40.9%
Moderate (some leisure streaming, online shopping, tracking investments, etc.)	40.2%	42.3%	37.8%	39.9%	37.5%	52.9%	38.2%	45.8%
Low or not at all (emailing, social media, reading news, etc.)	8.6%	10.5%	4.1%	0.9%	8.3%	18.1%	7.1%	13.3%
	100.0%	100.0%	100.0%	100.0%	100.0%	99.9%	99.9%	100.0%

Table 9 Question 9: A Idea Support Over-all Ranking by Weighted Average

Question 9 Ideas / Options Presented (Higher weighted average / lowest rank # most desired)	1327 All	R A N K	910 Full Time	R A N K	339 All Part Time	R A N K	219 Age <55	R A N K	908 Age 56-74	R A N K	200 Age >75	R A N K	614 Primary Res <10	R A N K	422 Primary Res >10	R A N K
Cooperating with City, LCRA and other regulatory agencies to protect Lake LBJ from pollution, waterweeds, milfoil and other environmental threats	3.33	1	3.18	2	3.69	1	3.19	3	3.35	1	3.40	1	3.32	2	3.11	2
Continuing improvement of roads and adding a center turn lane on 2147	3.24	2	3.30	1	3.07	6	3.32	1	3.25	3	3.11	3	3.33	1	3.21	1
Enhancing technology infrastructure to optimize future technological advances in internet, cellular and wireless coverage	3.22	3	3.08	3	3.59	2	3.24	2	3.27	2	3.03	5	3.24	3	3.00	3
Focusing on long term water availability strategies	3.13	4	3.03	4	3.36	3	2.98	5	3.15	4	3.23	2	3.13	4	2.98	4
Focusing on protecting and preserving the Live Oak tree population	2.95	5	2.82	5	3.24	4	2.81	7	2.96	5	3.08	4	2.90	5	2.82	5
Encouraging retail/commercial development consistent with community and architectural standards	2.84	6	2.70	7	3.14	5	2.98	5	2.86	6	2.60	9	2.89	6	2.54	9
Becoming the leader in environmental stewardship in the HSB area (i.e. recycling efforts, water conservation)	2.82	7	2.73	6	3.02	7	2.76	8	2.84	7	2.80	8	2.86	7	2.59	7
Establishing standards and information sources for xeriscaping and other water conservation efforts	2.74	8	2.67	8	2.88	9	2.65	10	2.75	9	2.81	7	2.78	9	2.57	8
Developing additional land for public parks, hiking trails and other outdoor recreational activities	2.73	9	2.62	9	2.99	8	2.95	6	2.75	9	2.43	10	2.79	8	2.44	10
Developing a plan for independent living, assisted living and nursing care facilities.	2.51	10	2.53	10	2.44	13	2.16	16	2.53	10	2.82	6	2.49	12	2.61	6
Enhancing the road, sewer, water infrastructure to increase marketability of undeveloped lots thru public/private partnerships	2.48	11	2.37	12	2.68	11	2.67	9	2.49	11	2.22	13	2.53	10	2.21	12
Encouraging the formation of a HSB Chamber of Commerce to support local business development	2.43	12	2.30	13	2.70	10	2.58	11	2.45	12	2.18	14	2.51	11	2.10	13
Creating a public Information Center/library that includes internet access, technology exchanges and reading rooms, as well as, providing social spaces and educational programming	2.38	13	2.41	11	2.25	15	2.33	12	2.38	13	2.41	11	2.48	13	2.25	11
Partnering with POAs (Property Owner Associations) and commercial partners to create recreational programs and events for the general public	2.19	14	2.14	14	2.27	14	2.16	16	2.22	14	2.11	16	2.30	14	1.97	16
Developing public lake access	2.14	15	2.10	15	2.08	19	2.14	17	2.18	15	1.92	17	2.22	15	1.92	17
Forming a historical society to preserve HSB history	2.12	16	2.07	16	2.21	16	2.05	18	2.11	16	2.26	12	2.12	16	2.03	14
Devoting City resources to promoting HSB Resort amenities as a visitor destination	2.08	17	1.87	19	2.47	12	2.31	13	2.09	17	1.77	19	2.08	18	1.71	19
Establishing an array of community transportation options between HSB and other TX cities for shopping, cultural events or personal needs	2.04	18	2.02	17	2.08	19	2.01	19	2.04	18	2.12	15	2.07	19	1.99	15
Seeking partnership with private school(s) to attract families with young children to HSB	2.03	19	1.94	18	2.20	17	2.25	14	2.01	19	1.90	18	2.10	17	1.79	18

Table 10 Question 9:B Idea Support: Full Time Respondents Ranking by Percentage

Full Time Respondents	Total Positive	Very strongly	Somewhat strongly	R A N K *	Not very strongly	Not at all	Total Negative
Continuing improvement of roads and adding a center turn lane on 2147	82.43%	52.06%	30.37%	1	13.57%	4.00%	17.57%
Cooperating with City, LCRA and other regulatory agencies to protect Lake LBJ from pollution, waterweeds, milfoil and other environmental threats	79.51%	52.93%	26.58%	2	6.20%	14.29%	20.49%
Enhancing technology infrastructure to optimize future technological advances in internet, cellular and wireless coverage	74.00%	52.44%	21.56%	3	7.44%	18.56%	26.00%
Focusing on long term water availability strategies	74.67%	47.11%	27.56%	4	6.33%	19.00%	25.33%
Focusing on protecting and preserving the Live Oak tree population	67.07%	34.81%	32.26%	5	12.97%	19.96%	32.93%
Becoming the leader in environmental stewardship in the HSB area (i.e. recycling efforts, water conservation)	63.84%	31.92%	31.92%	6	13.46%	22.69%	36.15%
Encouraging retail/commercial development consistent with community and architectural standards	60.62%	32.48%	28.14%	7	15.80%	23.58%	39.38%
Establishing standards and information sources for xeriscaping and other water conservation efforts	61.06%	26.94%	34.12%	8	17.96%	20.99%	38.95%
Developing additional land for public parks, hiking trails and other outdoor recreational activities	58.03%	25.78%	32.25%	9	19.98%	21.99%	41.97%
Developing a plan for independent living, assisted living and nursing care facilities.	57.70%	18.53%	39.17%	10	18.97%	23.33%	42.30%
Creating a public Information Center/ library that includes internet access, technology exchanges and reading rooms, as well as, providing social spaces and educational programming	47.27%	18.02%	29.25%	11	28.48%	24.25%	52.73%
Enhancing the road, sewer, water infrastructure to increase marketability of undeveloped lots thru public/private partnerships	46.87%	17.52%	29.35%	12	25.45%	27.68%	53.13%
Encouraging the formation of a HSB Chamber of Commerce to support local business development	42.37%	17.06%	25.31%	13	28.32%	29.32%	57.64%
Partnering with POAs (Property Owner Associations) and commercial partners to create recreational programs and events for the general public	38.35%	11.37%	26.98%	14	25.98%	35.67%	61.65%
Developing public lake access	34.87%	14.22%	20.65%	15	25.73%	39.39%	65.12%
Forming a historical society to preserve HSB history	31.36%	7.56%	23.80%	16	37.04%	31.59%	68.63%
Establishing an array of community transportation options between HSB and other TX cities for shopping, cultural events or personal needs	29.47%	8.26%	21.21%	17	34.49%	36.05%	70.54%
Seeking partnership with private school(s) to attract families with young children to HSB	26.63%	10.00%	16.63%	18	30.34%	43.03%	73.37%
Devoting City resources to promoting HSB Resort amenities as a visitor destination	25.23%	7.85%	17.38%	19	28.59%	46.19%	74.78%

Table 11 Question 9:C Idea Support: All Part Time Respondents Ranking by Percentage

All Part Time Respondents	Total Positive	Very strongly	Somewhat strongly	RANK*	Not very strongly	Not at all	Total Negative
Cooperating with City, LCRA and other regulatory agencies to protect Lake LBJ from pollution, waterweeds, milfoil and other environmental threats	94.36%	74.78%	19.58%	1	5.04%	0.59%	5.63%
Enhancing technology infrastructure to optimize future technological advances in internet, cellular and wireless coverage	93.14%	66.87%	26.27%	2	5.97%	0.90%	6.87%
Focusing on long term water availability strategies	87.17%	50.45%	36.72%	3	11.64%	1.19%	12.83%
Focusing on protecting and preserving the Live Oak tree population	83.08%	44.21%	38.87%	4	13.65%	3.26%	16.91%
Encouraging retail/commercial development consistent with community and architectural standards	77.68%	41.37%	36.31%	5	16.37%	5.65%	22.02%
Continuing improvement of roads and adding a center turn lane on 2147	73.52%	38.10%	35.42%	6	21.43%	5.06%	26.49%
Becoming the leader in environmental stewardship in the HSB area (i.e. recycling efforts, water conservation)	74.03%	34.33%	39.70%	7	20.00%	5.97%	25.97%
Developing additional land for public parks, hiking trails and other outdoor recreational activities	72.49%	34.32%	38.17%	8	19.23%	8.28%	27.51%
Establishing standards and information sources for xeriscaping and other water conservation efforts	68.16%	24.92%	43.24%	9	26.73%	5.11%	31.84%
Encouraging the formation of a HSB Chamber of Commerce to support local business development	58.21%	22.09%	36.12%	10	31.94%	9.85%	41.79%
Enhancing the road, sewer, water infrastructure to increase marketability of undeveloped lots thru public/private partnerships	59.70%	20.60%	39.10%	11	28.06%	12.24%	40.30%
Devoting City resources to promoting HSB Resort amenities as a visitor destination	46.59%	18.99%	27.60%	12	34.72%	18.69%	53.41%
Developing a plan for independent living, assisted living and nursing care facilities.	46.43%	11.61%	34.82%	13	39.88%	13.69%	53.57%
Partnering with POAs (Property Owner Associations) and commercial partners to create recreational programs and events for the general public	40.30%	8.66%	31.64%	14	37.61%	22.09%	59.70%
Creating a public Information Center/ library that includes internet access, technology exchanges and reading rooms, as well as, providing social spaces and educational programming	37.80%	10.12%	27.68%	15	39.58%	22.62%	62.20%
Forming a historical society to preserve HSB history	32.83%	7.46%	25.37%	16	48.06%	19.10%	67.16%
Seeking partnership with private school(s) to attract families with young children to HSB	35.21%	10.36%	24.85%	17	39.35%	25.44%	64.79%
Developing public lake access	27.46%	7.46%	20.00%	19	45.67%	26.84%	72.51%
Establishing an array of community transportation options between HSB and other TX cities for shopping, cultural events or personal needs	30.12%	12.95%	17.17%	19	34.94%	34.94%	69.88%

Table 12 Question 10 Desire for Future Growth

Question 10 Desire of future growth and development (commercial, recreational housing, etc.)								
Number of Respondents per category	1269	873	323	212	865	192	585	403
	All	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
HSB is going to grow, so we need to carefully manage it	57.9%	57.8%	60.7%	57.1%	56.5%	65.1%	57.4%	59.1%
We need to support and encourage growth and development	19.9%	17.3%	22.6%	27.4%	20.8%	7.8%	22.1%	11.7%
I would like to see HSB stay the way it is	14.2%	17.0%	9.3%	9.4%	14.5%	18.2%	12.6%	20.6%
We need to slow down the growth and development	6.1%	6.8%	4.0%	4.7%	6.5%	5.7%	7.2%	6.2%
Not sure	1.9%	1.1%	3.4%	1.4%	1.7%	3.1%	0.7%	2.5%
	100.0%	100.0%	100.0%	100.0%	100.0%	99.9%	100.0%	100.1%
Only the Over 75 and Primary Residents > 10 groups placed "I'd like to see HSB stay the same" above "Support and encourage growth"								

Table 13 Question 11 Bond Pay Back

Question 11 Desired Bond pay back method								
Number of Respondents per category	1255	860	320	207	858	190	582	393
	All	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
Increasing property taxes	13.0%	15.2%	6.9%	8.7%	13.1%	17.4%	12.5%	17.0%
Increasing fees for utilities provided by	27.6%	21.0%	41.3%	28.5%	27.5%	26.8%	25.9%	20.6%
Not sure	59.4%	63.7%	51.9%	62.8%	59.4%	55.8%	61.5%	62.3%
	100.0%	99.9%	100.1%	100.0%	100.0%	100.0%	99.9%	99.9%
The Part Time Resident respondents were much less interested in increasing property taxes as a way of paying for bonds, whereas, the Full Time Resident respondents were more closely split between two payback options.				The largest response was "Not sure" across all response groups. Since surveys are an opportunity to educate, this can open a conversation on the bond expense issue. However, it is interesting that 40.6% did choose to personally pay more in some way.				

Table 14 Question 12:A Appearance of Public Spaces by Weighted Average

Question 12 Appearance of public spaces (weighted averages)								
Ranked from Very Good (higher score/low rank#) to Needs Much Improvement (lower score/high rank#)								
Number of Respondents per category	1264	871	322	210	861	193	585	402
	R A N K	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
All	All							
Street shoulders	2.64	1	2.66	2.62	2.64	2.67	2.52	2.67
Residential area entrances	2.40	2	2.29	2.64	2.29	2.41	2.50	2.34
Vacant lots	2.27	3	2.28	2.22	2.41	2.31	1.97	2.32
Commercial buildings	2.14	4	2.05	2.34	2.05	2.13	2.27	2.07
Construction sites	2.11	5	2.03	2.28	2.19	2.10	2.04	2.11

Table 15 Question 12:B Appearance of Public Spaces by Percentage

All Respondents	Very good	Needs some improvement	Needs much improvement
Street shoulders	67.77%	28.59%	3.63%
Residential area entrances	55.94%	28.21%	15.86%
Vacant lots	41.08%	45.28%	13.64%
Commercial buildings	33.92%	45.98%	20.10%
Construction sites	31.14%	48.23%	20.62%

Full Time	Very good	Needs some improvement	Needs much improvement
Street shoulders	69.40%	27.20%	3.40%
Residential area entrances	51.33%	26.65%	22.02%
Vacant lots	42.37%	43.66%	13.97%
Commercial buildings	30.89%	43.59%	25.52%
Construction sites	29.29%	44.29%	26.43%

All Part Time	Very good	Needs some improvement	Needs much improvement
Street shoulders	66.04%	31.78%	2.18%
Residential area entrances	66.35%	29.25%	4.40%
Commercial buildings	40.95%	51.75%	7.30%
Vacant lots	35.18%	57.33%	7.49%
Construction sites	36.05%	49.53%	14.42%

Table 16 Question 13 Resort Membership

Question 13 Respondent Resort membership status								
Number of Respondents per category	1279	880	324	212	871	196	590	407
	All	Full time	All Part time	Age <55	Age 56-74	Age >75	Primary Res <10	Primary Res >10
Yes	75.0%	75.3%	81.2%	77.8%	74.2%	75.5%	71.5%	80.1%
No	25.0%	24.7%	18.8%	22.2%	25.8%	24.5%	28.5%	19.9%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%