

TEXAS PULSE

SEPTEMBER 2015

CROSSWIND

It's been said that Texas is a state of mind and our most recent Texas Pulse certainly reinforces that statement – when it comes to football, ice cream and the Affordable Care Act.

The Texas Pulse is a periodic survey of voter attitudes about the matters that matter to Texans. Crosswind began producing the Texas Pulse more than a year ago and in the course of our research we've talked to Texans about their opinions on people, commodities, brands, and issues on the state, national and world stages.

Why the Texas Pulse?

Texas is home to six of the top 50 companies on the Fortune 500, and home to 51 overall. Texas grossed more than \$264.7 billion a year in exports — more than California and New York combined. As a sovereign country, Texas would be the 12th largest economy in the world by GDP, ahead of South Korea and Australia. So the fact is Texas matters. And what Texans think matters as well. The Texas Pulse is intended to provide a guide for those who seek to understand and do business in Texas.

Our professional polling partner, Pulse Opinion Research in Arlington, Texas, has been providing high-quality regional and national research services to individuals and businesses since 2006. Pulse Opinion Research provides a methodologically proven survey platform for a host of clients and has collected data for presidential campaigns, and regularly surveys consumer views and opinions for some of the nation's most important and most visible brands.

From the September 2015 Texas Pulse, we've learned that Texans:

- Want to see the University of Texas play Texas A&M in football,
- Are very happy to see Blue Bell Ice Cream back on the shelves
- Use toll roads, and enjoy the experience they bring.
- Republicans like Greg Abbott, and dislike Barack Obama
- Democrats like Hillary Clinton, and dislike Ted Cruz.
- And, for those fans of Texas Hold 'em, some 58-percent of Texans favor the expansion of gambling in Texas.

If you would like to learn more about the Texas Pulse or have one of our team present the detailed findings to you or your group, please drop me a line. In the meantime, I hope you find this report informative and helpful.

Sincerely,



Thomas Graham
President & CEO



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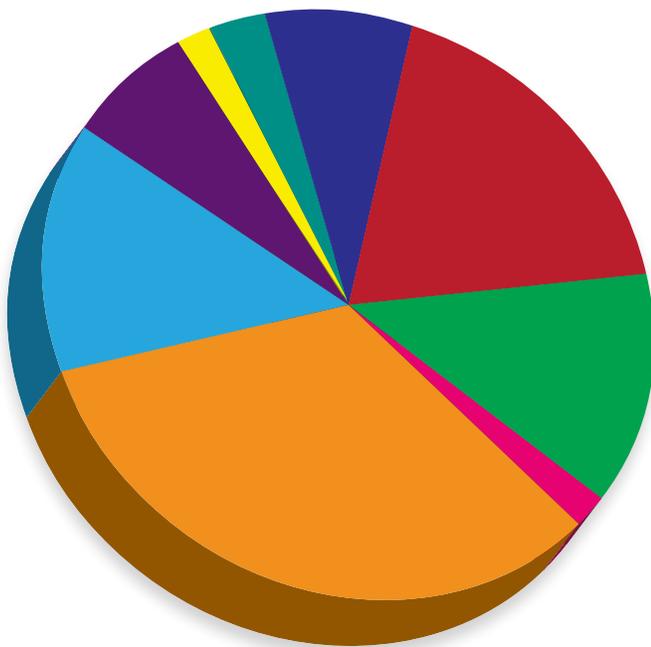
The Texas Pulse, a periodic survey of Texans' views on a variety of cultural, economic and political issues, was conducted. 11-14 by Crosswind Media and Public Relations. The poll surveyed 1,000 Texas likely voters. The margin of error is +/- 3 percentage points.

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Most Important Issues Facing Texas



MOST IMPORTANT ISSUES FACING TEXAS			
	ALL VOTERS	GOP	DEM
Taxes & Spending	8%	11%	5%
Economy & Jobs	18%	15%	21%
Education	13%	8%	21%
Transportation	2%	1%	3%
Immigration & Border Security	33%	50%	10%
Health Care	14%	7%	24%
Social Issues	7%	4%	12%
Some Other Issue	2%	1%	2%
Not Sure	3%	2%	2%

The Texas Pulse surveyed what Texans believe are the most important issues facing the country, with each respondent selecting the one issue considered most important.

The topics chosen for this survey include items in the news, as well as issues designed to match previous surveys to allow a determination about how attitudes shift over time.

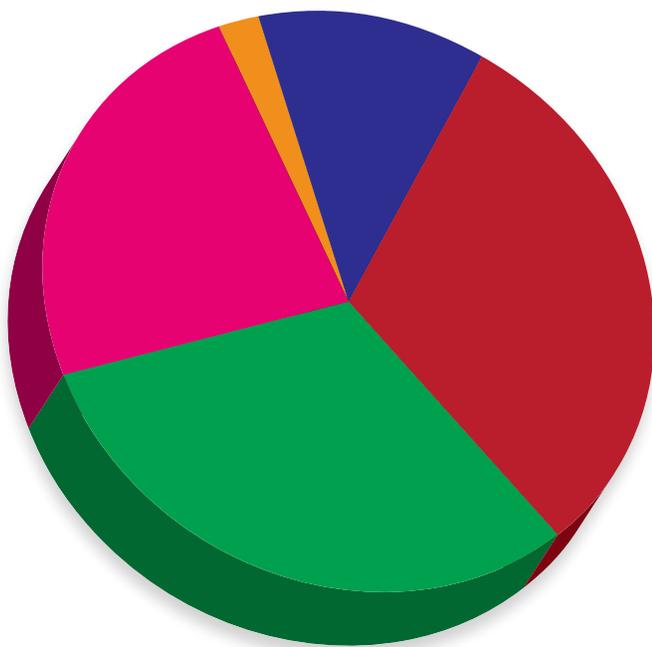
Immigration and border security continues to be cited as the most important issue facing Texans. One third of Texans cited it as their top issue, statistically the same as in the November 2014 Texas Pulse survey (35%). Responses regarding this issue, however, are very partisan, with 50% of Republicans citing it as their top issue while only 10% of Democrats identified it that way.

Eighteen percent of Texans cited the economy and jobs as their top issue, making it the most bipartisan issue, with 15% of Republicans and 21% of Democrats agreeing. In 2014, 12.2% of Texans cited it as their top issue. Although Hispanics and Anglos polled the same (16%) on this question, double that percentage of African-Americans (31%) cited this as their top issue.

Health care was next. Although only 7% of Republicans cited it as their biggest issue, one quarter of Democrats (24%) did so. Women were slightly more likely (16%) to cite this issue than were men (12%).

Education is the top issue for 13% of all voters, down slightly from 17% in 2014. Eight percent of Republicans, and 21% of Democrats named this issue as their priority.

Satisfaction with the Health Care System



SATISFACTION WITH HEALTH CARE SYSTEM			
	ALL VOTERS	GOP	DEM
Very Satisfied	12%	8%	18%
Somewhat Satisfied	31%	23%	43%
Not Very Satisfied	31%	34%	28%
Not at all Satisfied	24%	33%	10%
Not Sure	2%	2%	1%

The Texas Pulse surveyed Texans about the U.S. health care system to see whether Texans are satisfied or not in the wake of the implementation of the Affordable Care Act (ACA).

Survey results indicate Texans' attitude about the U.S. health care system remain polarized in the wake of the implementation of the ACA with 61% of Democrats saying they are very or somewhat satisfied with the system, compared to only 31% of Republicans who feel that way. Two thirds (67%) of Republicans are unsatisfied with the system, compared to only 38% of Democrats.

Among all voters, there is no appreciable difference in satisfaction among age groups or between men and women. African-Americans, however, are much more likely to report that they are satisfied with the system,

with 64% satisfied and only 34% unsatisfied. Anglo and Hispanic satisfaction is identical, with 41% satisfied and 57% unsatisfied.

By education level, the strongest support for the system is among those without high school diplomas, with 69% supportive. This compares to supporters with high school diplomas (48%), some college (31%), college graduates (43%) and those with postgraduate experience (47%).

Among those who cited health care as the biggest issue facing Texas, only 43% were satisfied with the health care system, while 55% were dissatisfied.

Presidential Primaries

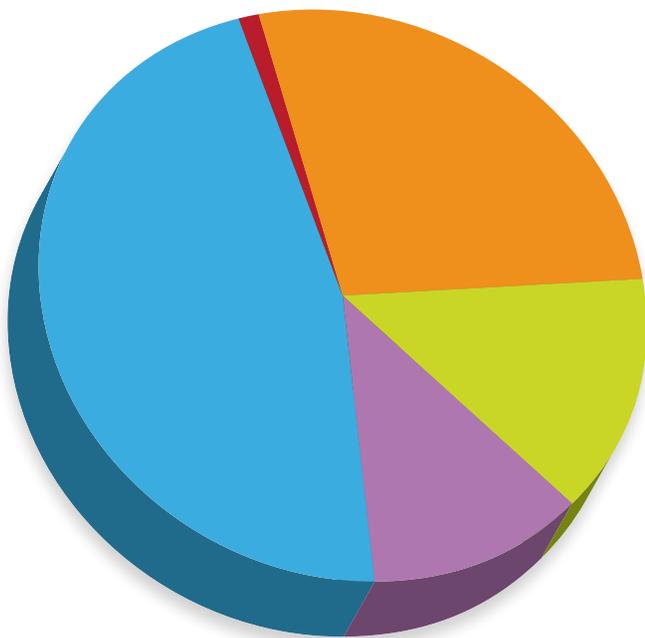


TEXAS PULSE

WHY POLL AROUND THE PRESIDENTIAL PRIMARY?

Although Texas doesn't attract as much attention in the presidential primary as the early-voting states like Iowa and New Hampshire, Texas voters will play a significant role in determining the primary winners, and candidates from both parties often look to the state for much-needed financial support. Both factors make it important to understand how Texas voters are feeling about the presidential candidates, which is why Crosswind wrote and designed questions to determine the depth of support for the candidates in both parties.

Favorability: President Barack Obama



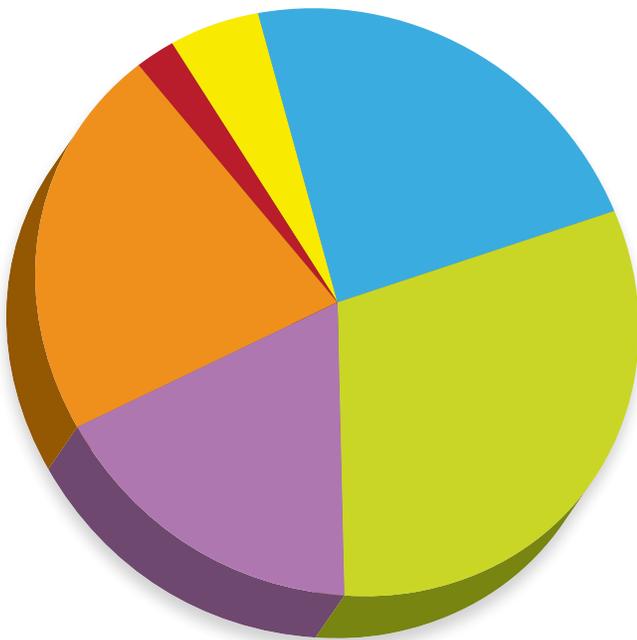
PRESIDENT OBAMA FAVORABILITY

	ALL VOTERS	GOP	DEM
Very Favorable	27%	5%	62%
Somewhat Favorable	14%	5%	24%
Somewhat Unfavorable	12%	14%	8%
Very Unfavorable	46%	74%	6%
Never Heard of Him	1%	1%	0%
Not Sure	0%	1%	0%

A majority of Texans (58%) see President Barack Obama unfavorably, compared to 41% who see him favorably.

Opinions about Obama remain highly polarized, with only 10% of Republicans in Texas viewing him favorably, while 88% see him unfavorably. This compares to 86% of Democrats who see the president favorably. Republican opposition is stark, with 74% registering very unfavorable opinions.

Favorability: Governor Greg Abbott

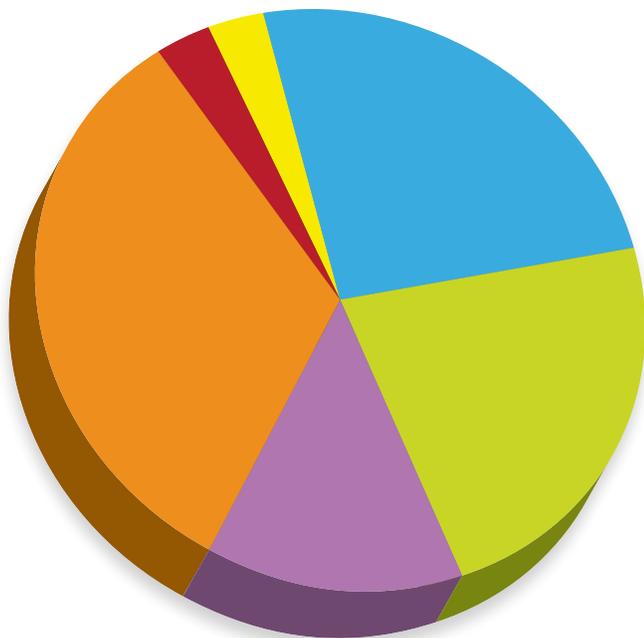


GOVERNOR ABBOTT FAVORABILITY			
	ALL VOTERS	GOP	DEM
Very Favorable	23%	37%	5%
Somewhat Favorable	31%	40%	19%
Somewhat Unfavorable	17%	10%	26%
Very Unfavorable	22%	8%	43%
Never Heard of Him	2%	1%	3%
Not Sure	5%	4%	4%

Governor Greg Abbott's favorability rating is 54% positive and 39% negative. Among Republicans, Abbott is seen favorably by 77%, while only 24% of Democrats view him favorably.

Abbott, who campaigned heavily in 2014 among Hispanic groups, has a 49% favorability and 41% unfavorability among Hispanic Texans. Among all Texans identifying as politically moderate, he is seen favorably by 43%, unfavorably by 48%.

Favorability: Senator Ted Cruz



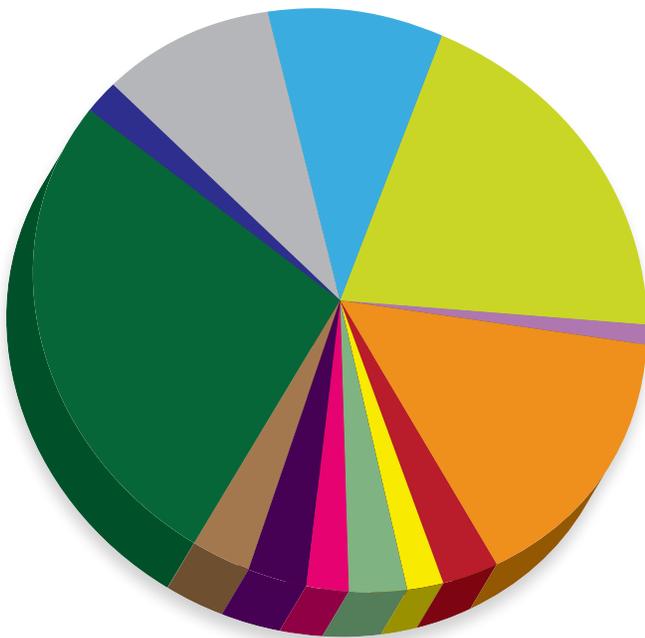
SENATOR CRUZ FAVORABILITY

	ALL VOTERS	GOP	DEM
Very Favorable	25%	40%	4%
Somewhat Favorable	23%	32%	9%
Somewhat Unfavorable	14%	11%	14%
Very Unfavorable	33%	12%	66%
Never Heard of Him	3%	1%	4%
Not Sure	3%	4%	3%

Because Texas Senator Ted Cruz is also seeking the Republican nomination for president, Texas Pulse sought to gain better insights into Texans' views on the junior senator from Texas. In future surveys we will look at Senator John Cornyn as well. Sen. Ted Cruz is virtually tied on favorability in Texas, with 48% of Texans viewing him favorably and 47% viewing him unfavorably.

Cruz does well among Republicans, but not as well as Abbott, with 72% supporting Cruz while 77% support Abbott. Unlike Abbott, who is seen positively by a quarter (24%) of Democrats, only 13% of Democrats see Cruz favorably. Democrats strongly oppose the junior senator from Texas, with 80% rating him unfavorable, among them 66% who see him very unfavorably.

Republican Primary for President



GOP PRIMARY	
Jeb Bush	9%
Ben Carson	19%
Chris Christie	1%
Ted Cruz	15%
Carly Fiorina	3%
Mike Huckabee	2%
John Kasich	3%
Rand Paul	2%
Rick Perry	3%
Marco Rubio	3%
Donald Trump	26%
Scott Walker	2%
Not Sure	9%

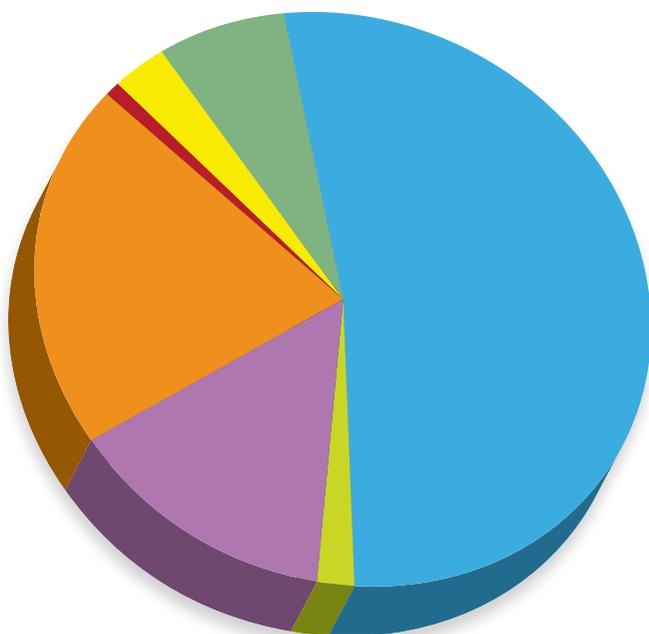
Donald Trump was the clear front-runner among Texas Republicans in the poll, which was conducted before the Sep. 18 debate. Trump wins support from over one quarter of Texans (26%), followed by Ben Carson (19%), Ted Cruz (15%) and Jeb Bush (9%). Thirty percent of Texans support candidates other than the top four or are undecided.

Among self-identified conservatives, Trump (24%) underperforms slightly compared to his overall total, but does well among Republicans identifying themselves as

moderate and liberal, taking 29% in each category, though liberals represent a very small proportion of Republicans surveyed. Carson (22%) and Cruz (17%) outperform slightly among conservatives.

Among those citing immigration and border security as their top issue, 36% choose Trump, compared to 17% for Cruz and 16% for Carson. Among those motivated by taxes and spending, Carson leads, with 31%, followed by Cruz (19%) and Trump (18%).

Democratic Primary for President



DEMOCRATIC PRIMARY	
Hillary Clinton	53%
Martin O'Malley	2%
Joe Biden	14%
Bernie Sanders	21%
Jim Webb	1%
Some Other Candidate	3%
Not Sure	6%

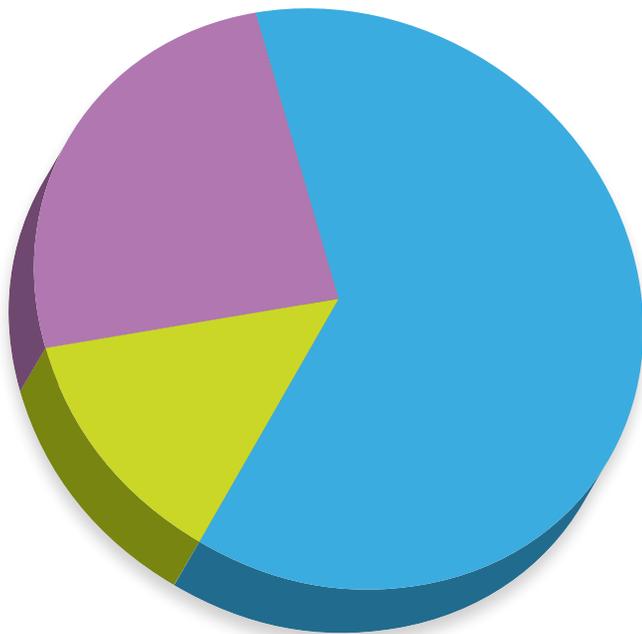
Hillary Clinton is still the clear choice of a majority of Democrats in Texas, with support from 53% of the poll respondents, more than double that of Bernie Sanders (21%) and nearly four times the percentage who would support Joe Biden (14%) should he enter the race.

Hillary's biggest strength in the primary is from minority Texans. While only 49% of Anglo Democrats support her, 65% of Blacks and 57% of Hispanics do.

Bernie Sanders takes one quarter (25%) of Anglo Democrats and fares well among those identifying as other (37%).

Sanders' support comes mostly from younger Democrats, with 26% of those 18-39 supporting him, 22% among those 40-64, and only 13% among those 65 and older.

Toll Road Usage



TOLL ROAD USAGE

Driven in Last Year	62%
Not Driven in Last Year	13%
Not Sure	25%

Transportation remains a key challenge for Texas and the state recently passed a proposition to increase funding of roadways. Many have suggested, however, that this funding is insufficient to meet the needs. One solution which allows for a quicker path for construction is the use of toll roads. The number of toll roads in the Lone Star State has increased significantly in recent years but they have a history of being controversial. The Texas Pulse shows significantly high usage of toll roads in Texas.

Overall, drivers of toll roads are younger, have a higher educational level, are more likely to have children at home, and earn more money than those who don't drive toll roads. Over two thirds of Texans (71%) have driven a toll road in the last year.

Among those 18-39, 77% have taken toll roads, compared to 74% for those between 40-64 and 60% for drivers over 65.

Anglos (72%) and African-Americans (75%) are more likely to drive toll roads than Hispanics (67%). While 48% of those with only a high school diploma have driven toll roads, that rate rises with education rates, with 69% who

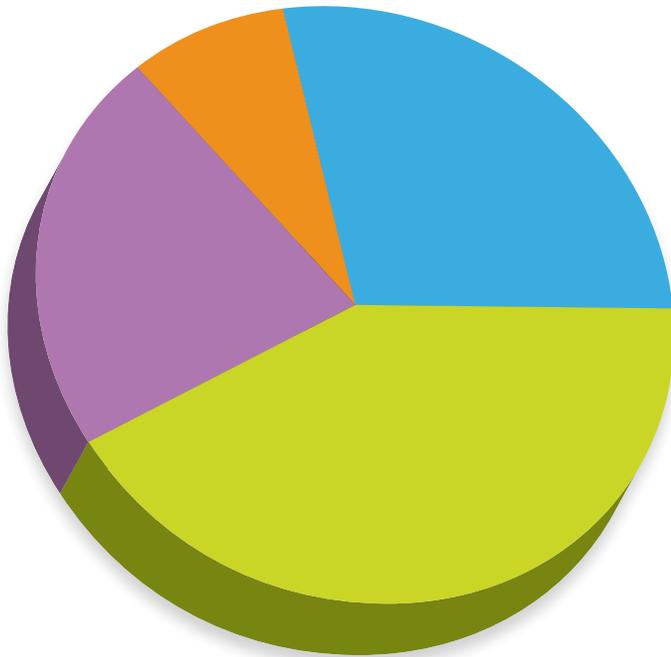
attend college likely to drive toll roads, as are college graduates (79%) and those with postgraduate education (78%).

Married drivers (76%) are more likely to take toll roads than unmarried drivers (63%). The highest rate of toll road usage comes from parents with children at home (82%), indicating that toll roads provide convenience during rush hours when busy parents have to pick children up from school or take them to an after-school event and need a more predictable drive time, which studies have shown toll roads provide.

A progressive increase in toll road usage by income may be related to increased interest in toll roads, but more likely indicates an inversely proportional value to drivers; as incomes rise, toll road bills diminish as a percentage of household costs.

Those most concerned with finding transportation solutions in Texas overwhelmingly embrace toll roads. Only 2% of Texans overall chose transportation as the biggest issue facing Texas. Among these, however, 84% said they drive toll roads.

Toll Road Experience



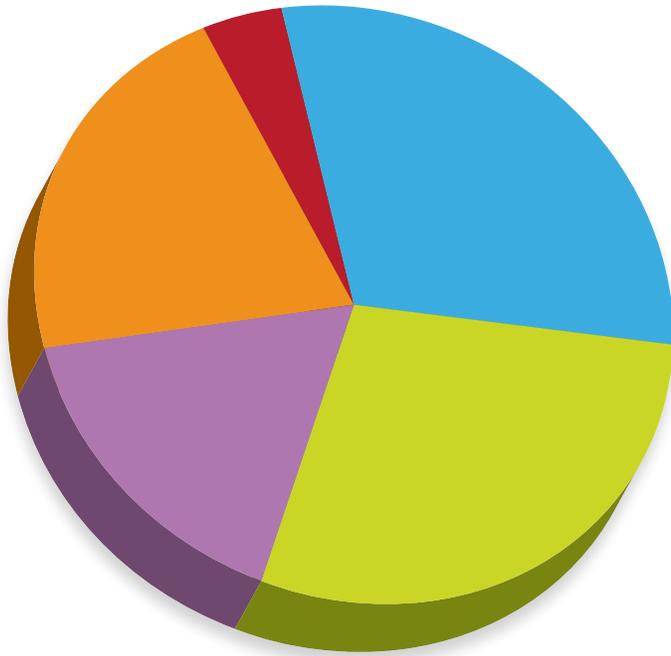
TOLL ROAD EXPERIENCE	
Excellent	27%
Good	42%
Fair	22%
Poor	8%
Not Sure	0%

With familiarity of toll roads comes praise. Texans give high ratings to toll roads, with 69% saying their experience on the roadways is excellent or good, and another 22% saying the experience was fair. The percentage of Texans rating their toll road experience well generally correlates with usage, indicating that those who use them most frequently are most likely to rate them well.

Although younger drivers are more likely to take toll roads, older drivers who do appreciate them. 72% of older drivers who take toll roads say their experience was excellent or good.

Among all ethnic and education categories, those who have taken toll roads report satisfaction, with the lowest satisfaction rates among those with only a high school diploma (59%) and the greatest satisfaction among those with some postgraduate education (77%). Parents with children report greater satisfaction with toll roads (74%) than do those without children (67%).

Support of Gambling Expansion



GAMBLING EXPANSION

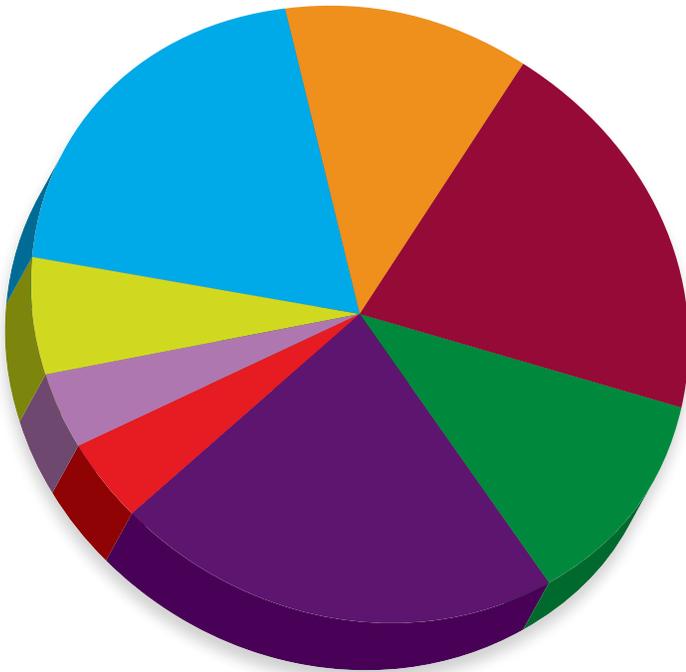
Strongly Favor	27%
Somewhat Favor	42%
Somewhat Oppose	22%
Strongly Oppose	8%
Not Sure	0%

Recently, the subject of expanding gambling in Texas has come up, particularly over the issue of expanding betting options at Horse Racing Tracks. The Texas Pulse asked residents of the Lone Star State if they support the expansion of gambling. A majority (58%) of Texans favor the expansion of gambling, while 37% are opposed. Supporters include 56% of Republicans and 64% of Democrats. A majority (52%) of conservatives, two-thirds (66%) of moderates and 68% of liberals unite on this issue. When respondents are measured by race, education, age and income level, the majority of all groups support the expansion, with the exception of people earning

over \$200,000. Even among those Texans who chose “social issues” as their top issue of concern, 49% support expanding gambling while 48% oppose it.

This question did not go into specific types of gambling expansion, such as historical betting at horseracing tracks, video lottery terminals, or full casinos. Historically, attempts to expand gambling in the legislature have shown that opposition arguments become stronger when debate focuses on a particular type of gambling. But as a general statement, this poll shows strong support for relaxation of gaming restrictions in the state.

Football in Texas



WHO WILL MAKE THE PLAYOFF?	
UT	12%
Texas A&M	20%
Baylor	12%
TCU	22%
Texas Tech	4%
Some Other Team	4%
None of These Teams	6%
Not Sure	20%

Texans love their college football, and there are 12 Texas teams eligible to participate in the FBS playoff system. The Texas Pulse surveyed Texans on which teams they think are most likely to make the playoff in 2015.

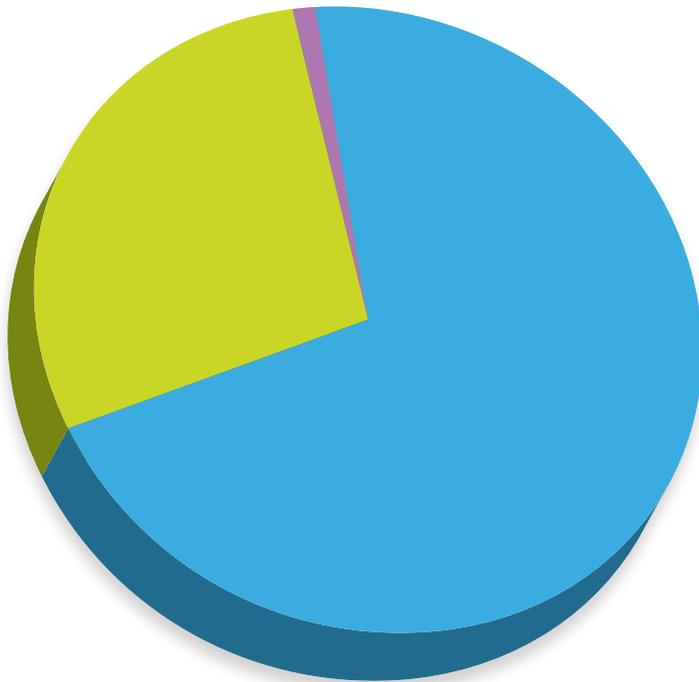
TCU, which is the highest-ranked Texas team in national sports polls, had the highest support with 22%, followed by Texas A&M at 20%. An equal number of Texans chose the University of Texas and Baylor (12%), although Baylor is consistently ranked higher nationally than the Longhorns. (This poll took place before UT's second loss of the season).

Men (29%) were far more likely than women (18%) to pick TCU, but women (6%) were more likely than men (2%) to pick Texas Tech. The age group consisting of college students (respondents 18-34) were far more likely to pick

UT (24%) than were respondents who were 40-65 (10%) and those over 65 (2%).

Conservatives chose TCU (25%) and Texas A&M (23%) far more frequently than they chose Baylor (12%) or Texas (9%). Liberal Texans were more likely to choose the Longhorns of UT (24%), a school with a liberal reputation, but almost as many (20%) chose Texas Tech, a school with no such reputation. Those without high school diplomas more often chose A&M (44%) and UT (26%), while giving a poor chance to the two top-polling teams, TCU and Baylor (both 5%). TCU, however, picked up support from a solid 34% of Texans with postgraduate experience. More than a third of Texans making over \$200,000 (37%) think TCU will make the playoff, but only 3% of the wealthiest Texans would bet some of that money on UT.

A&M/UT Rivalry

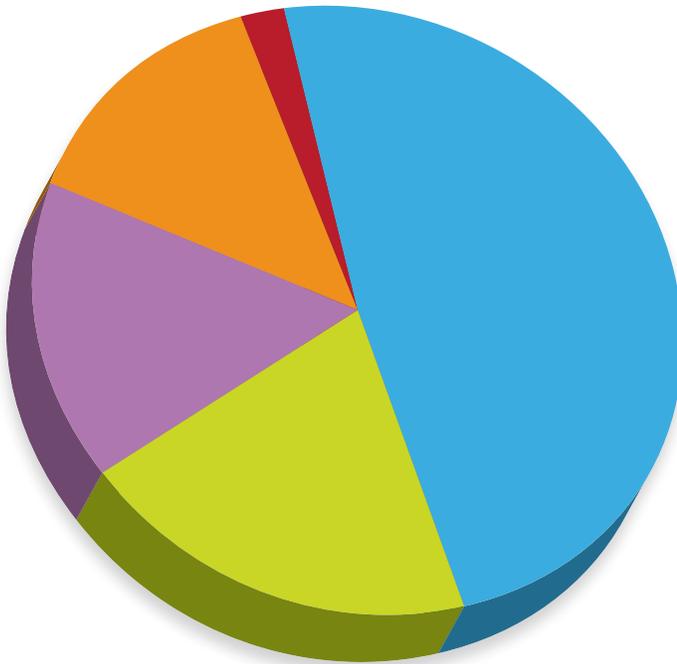


SHOULD A&M PLAY UT AGAIN?	
Yes	62%
No	13%
Not Sure	25%

An A&M and UT matchup in football this year is unlikely, unless the 24% of liberal Texans who picked UT and the 23% of conservative Texans who picked Texas A&M to make the playoffs are both right. The storied rivalry, however, is still on the minds of Texans, with 62% saying the two schools should play again and only 13% saying no. Those ages 18-35 are 10 percentage points more likely than those aged 65 or more to say yes (68% to 58%). Support is relatively equal across race and party. Conservatives (64%) are 10 points more likely than liberals (55%) to want to preserve this tradition, but preserving tradition is historically important to this group—hence the term conservative.

It is often said that college football is all about money these days. If so, the rivalry may have a good chance. Support for renewing the UT/A&M game increases as wealth increases, with Texans making over \$200,000 (69%) more likely to support bringing it back than those making under \$30,000 (58%). Perhaps this group is more likely to support the renewal because they are more likely able to afford tickets to the game?

Blue Bell



HOW LIKELY ARE YOU TO BUY BLUE BELL?

Very Likely	49%
Somewhat Likely	20%
Not Very Likely	16%
Not at all Likely	14%
Not Sure	2%

One of Texas' most beloved brands, Blue Bell Ice Cream, recently emerged from a recall of its products due to a multistate listeria outbreak tied to the ice cream. How do Texans feel about the Brenham-based company in the wake of the outbreak? The Texas Pulse surveyed residents of the Lone Star State about whether they would buy Blue Bell now that it is back in the freezers at their local stores.

Overall, almost half (49%) of poll respondents said they were very likely to buy Blue Bell, and a further 20% said they were somewhat likely. This feeling is strongest among conservative respondents, with 57% very likely and 19% somewhat likely, for a total of 76% likely to purchase Blue Bell, compared to liberal respondents who were 34% very likely and 24% somewhat likely, for a total of 58% likely.

There is no evidence that Blue Bell somehow tastes better to conservatives – otherwise it would probably be called

Red Bell – but there are slight cultural differences among Texans related to their consumption of the state's most famous homegrown dairy product. Blue Bell is more popular among whites (70%) and Hispanics (67%) than among African-Americans (62%).

Men (70%) are slightly more likely than women (67%) to crave Blue Bell, though the study did not specifically ask pregnant women, who might be more likely to answer yes. Parents with children at home were more likely (71%) than those without them (68%) to buy Blue Bell. Texans making over \$200,000 were among the least likely to buy Blue Bell, though still well over a majority at 59%.

The poll did not ask whether respondents were on a diet, and the lack of this crucial information may be responsible for disparities in the poll responses.