

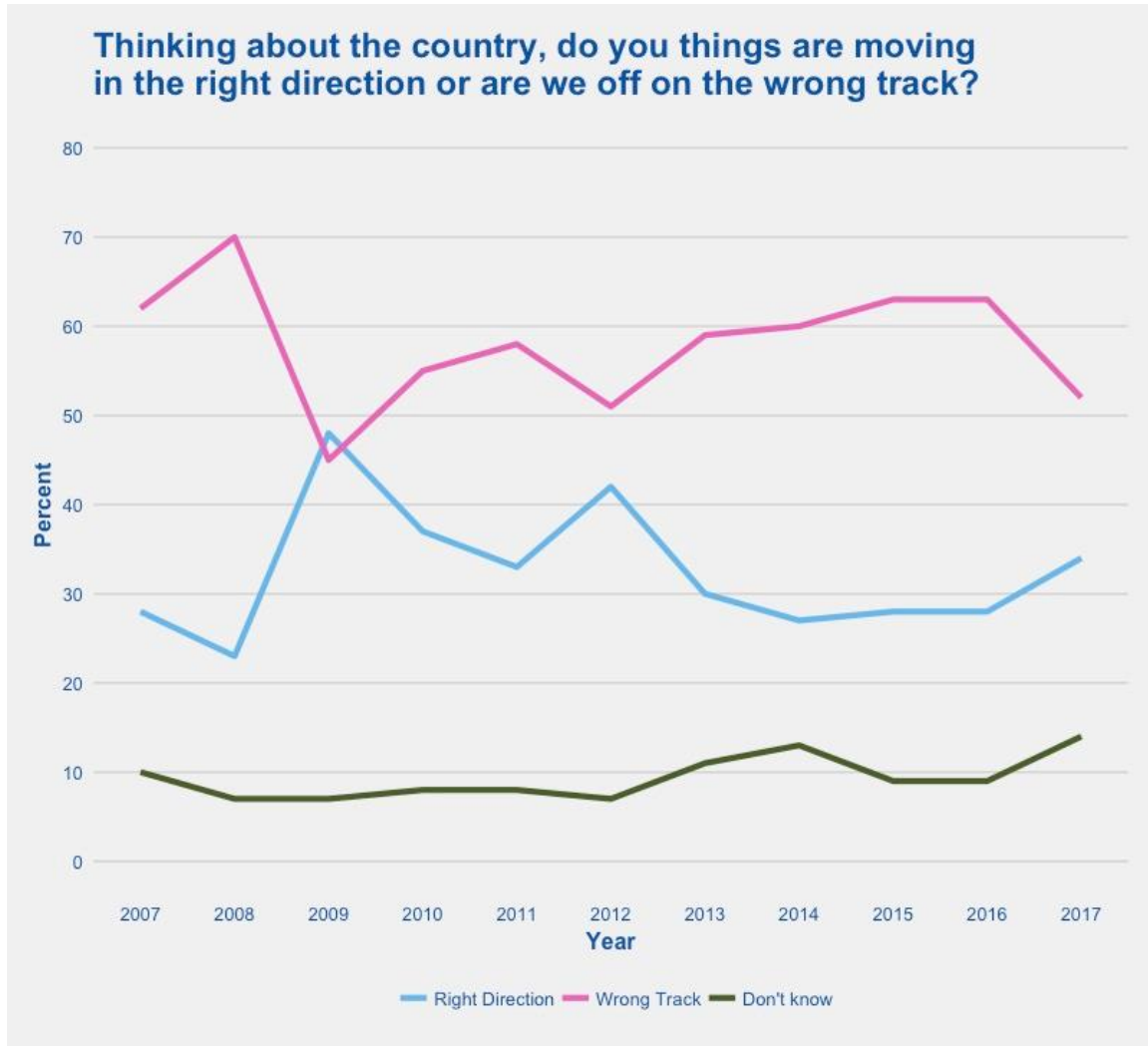
2017 Texas Lyceum Poll

Executive Summary of Economic Attitudes, Most Important Problems, Ratings of Top Political Figures, and an Early Look at the 2018 Texas Elections

Summary of Findings

The 2017 Texas Lyceum Poll continues its long time-series assessing attitudes towards the national economy, the state economy, and the current economic situation of Texas adults. The 2017 survey also assessed attitudes towards some of the elected officials of great import to present-day Texas: President Donald Trump, Governor Greg Abbott, and Lieutenant Governor Dan Patrick. Finally, looking ahead to the 2018 Texas Elections, the Texas Lyceum Poll takes a very early look at the likely Democratic challenge to incumbent Texas Senator Ted Cruz and Lieutenant Governor Dan Patrick.

Political Evaluations



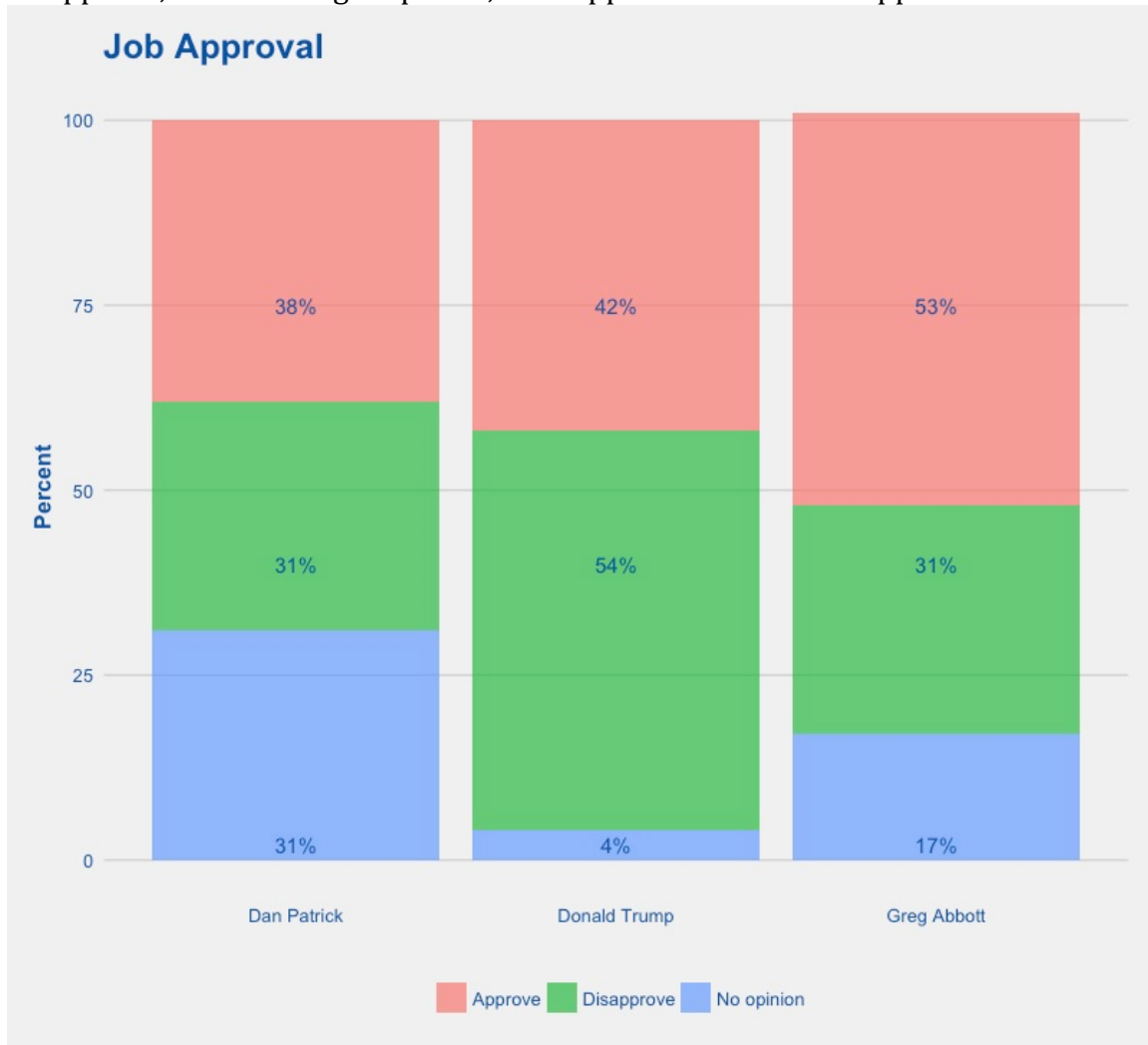
When asked about the direction of the country, this year's Texas Lyceum Poll shows an 11-point decrease from last year's poll in the percentage of Texans who say that the country is headed on the wrong track (from 63% to 52%) and a 6-point increase in the share of Texans saying that things are headed in the right direction (28% to 34%).

Partisan differences drive much of the results, with 84% of Democrats saying that the U.S. is on the wrong track, and 73% of Republicans saying that things are moving in the right direction. A plurality of White Texans say that the U.S. is headed the right direction (49%), while a majority of Hispanics said that it's headed on the wrong track (56%).

Similar to other recent surveys, slightly more Texans disapprove of the job Donald Trump is doing as President than approve (54% to 42%). However, views of Trump are highly polarized by party, with 85% of Republicans giving President Trump positive marks compared to 86% of Democrats who disapprove of his job performance. His performance is viewed negatively by 61% of Hispanics and 73% of 18-29 year olds, but is viewed positively by 60% of Whites.

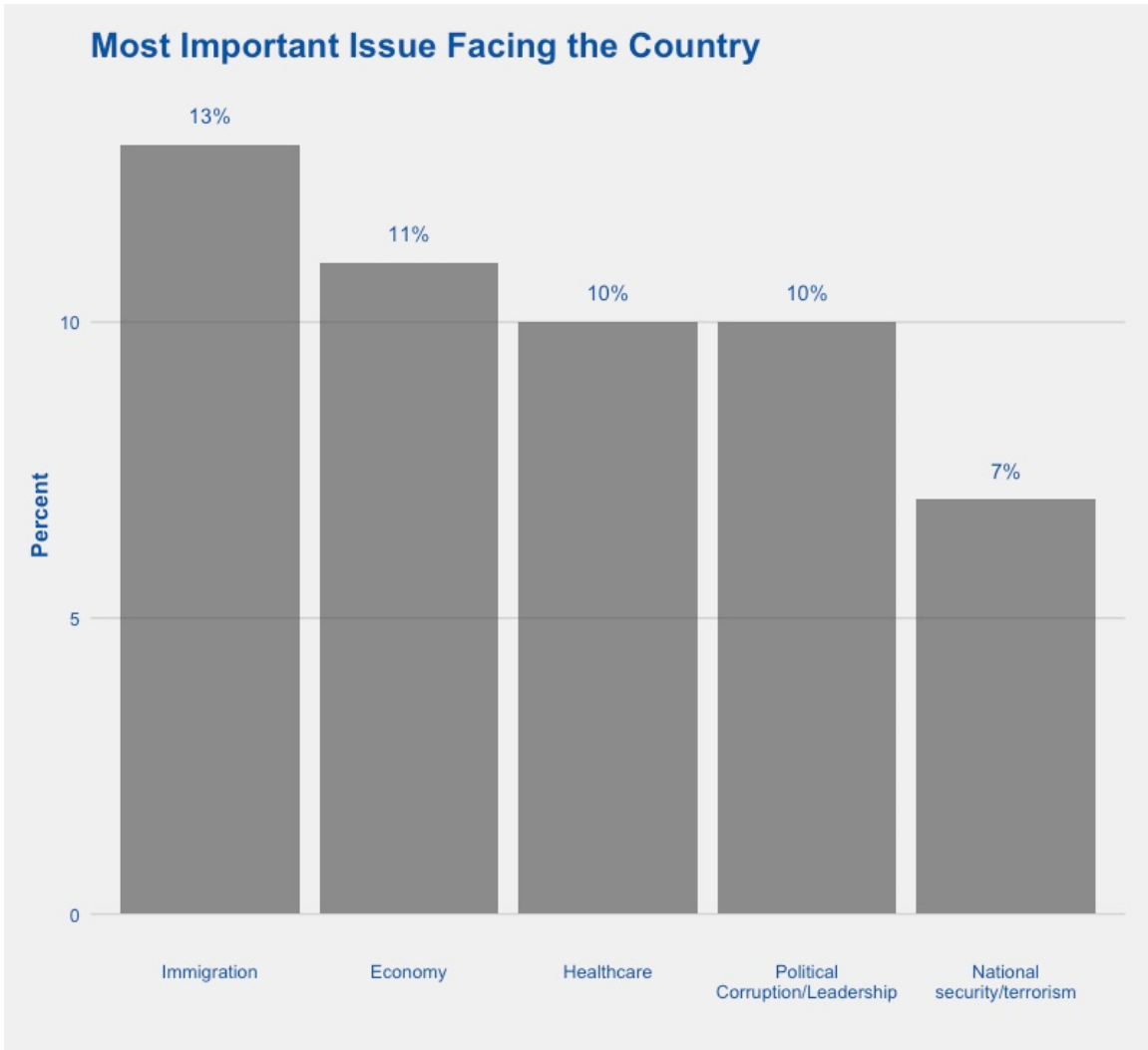
A majority of Texas adults (53%) approve of the job Greg Abbott is doing as governor, including 82% of Republicans (with 50% who strongly approve). While 53% of Democrats disapprove of Governor Abbott's job performance, a quarter expressed approval with the Republican Governor. A plurality of Hispanics also approve of Governor Abbott's job performance (49%), while 34% expressed disapproval.

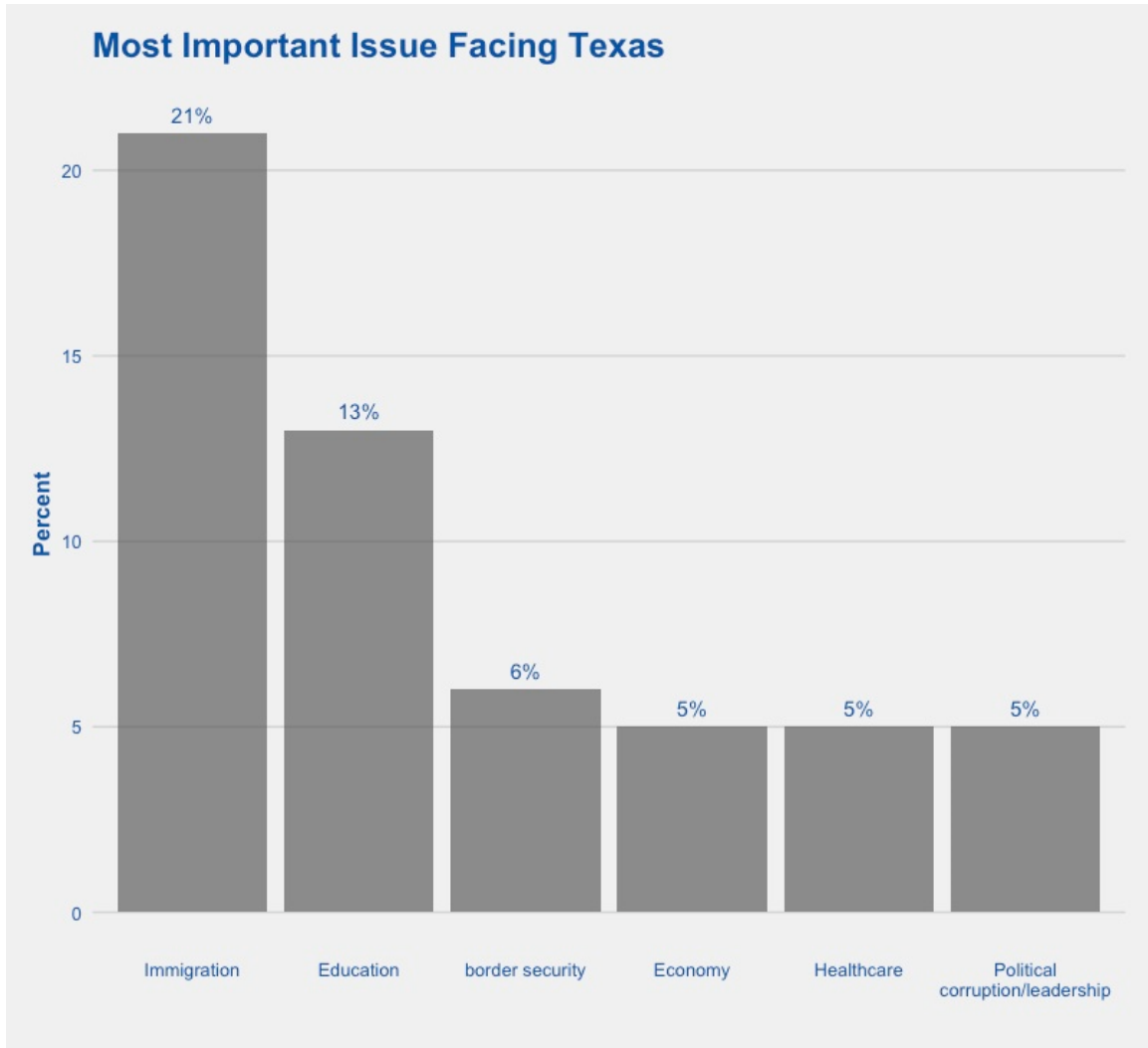
A plurality of Texas adults also approve of the job that Lieutenant Governor Patrick is doing (38%), with 31% disapproving, however, the Lt. Governor is far less known than either the governor or the President, with 31% of respondents unable to offer an assessment. Among adult Republicans, 64% approve of the Lt. Governor's performance, with 11% disapproving. Among Whites, 43% approve and 28% disapprove, while among Hispanics, 35% approve and 34% disapprove.



When asked what, in their opinion, is the most important problem facing the country, immigration ranked first with 13% of the responses, followed by the economy (11%), healthcare (10%), and political corruption/leadership (10%). Asked what the most important problem facing the state is, a plurality cited immigration (21%), followed by education (13%), border security (6%), and the economy, healthcare, and political corruption/leadership (all 5%).

*Texas Lyceum Poll
Executive Summary
April 2017*

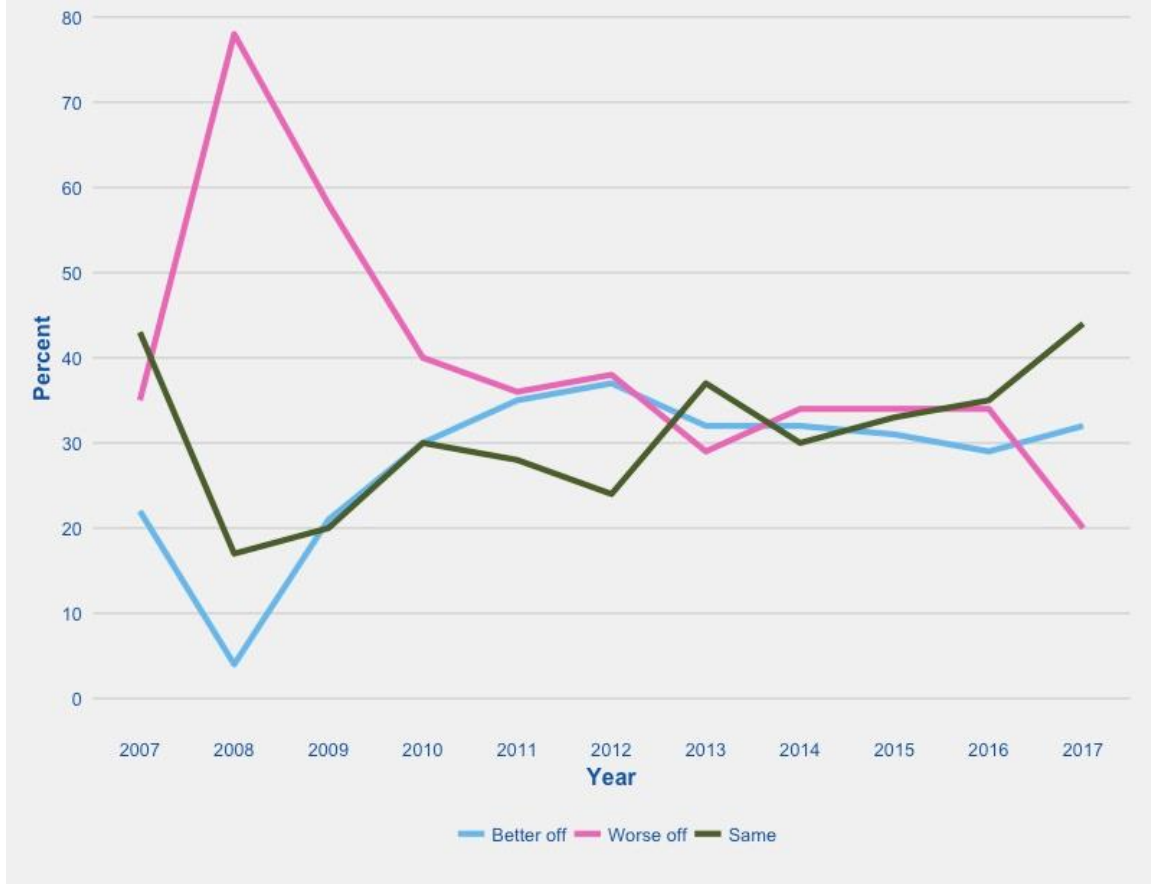




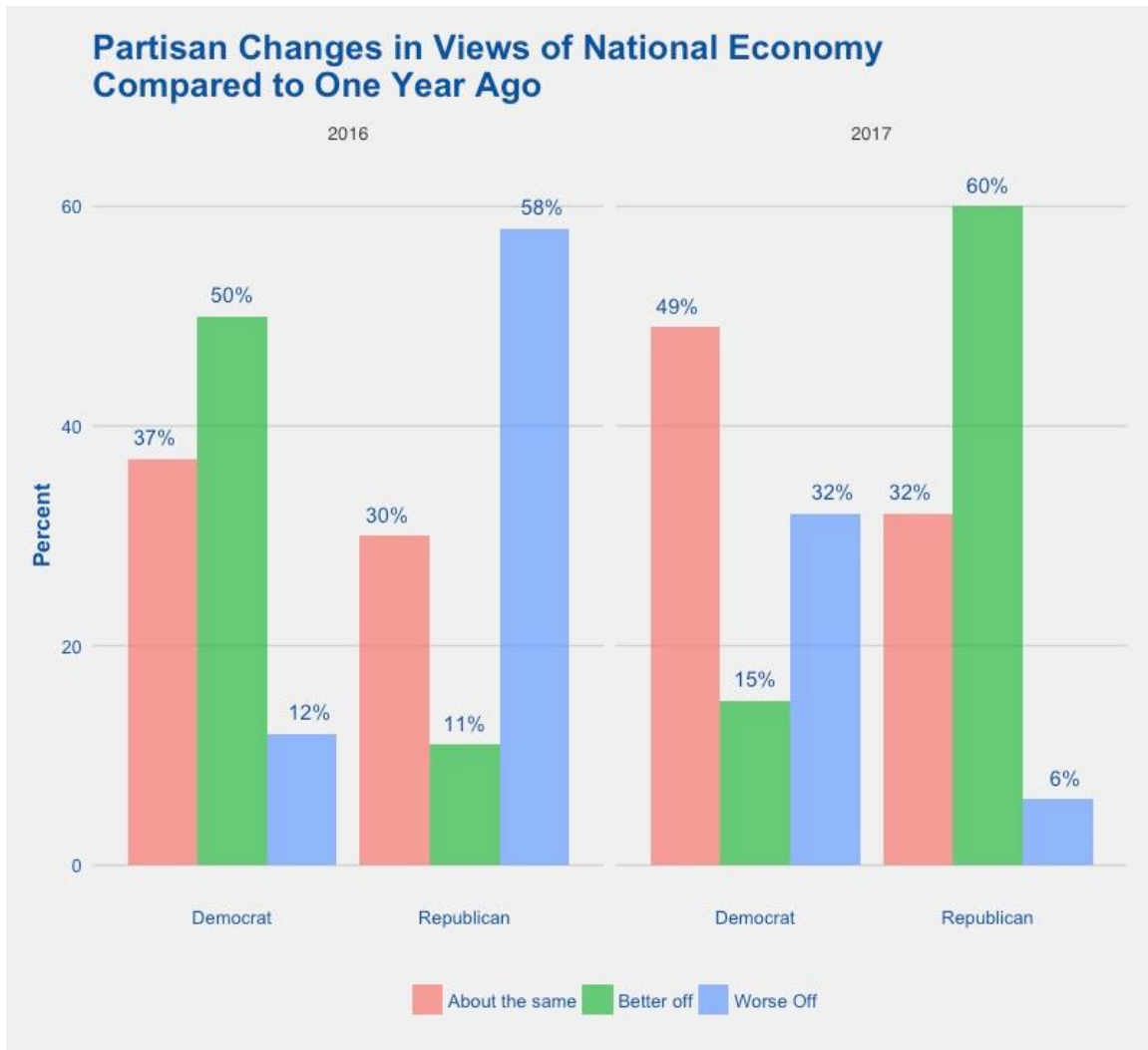
Economic Evaluations

Early in 2017, we witnessed a sharp change in how Texans view the national economy. While those who said that the national economy is “better” than it was a year ago only improved marginally, from 29% to 32%, the share who say that the economy is “worse off” dropped considerably, from 34% to 20%.

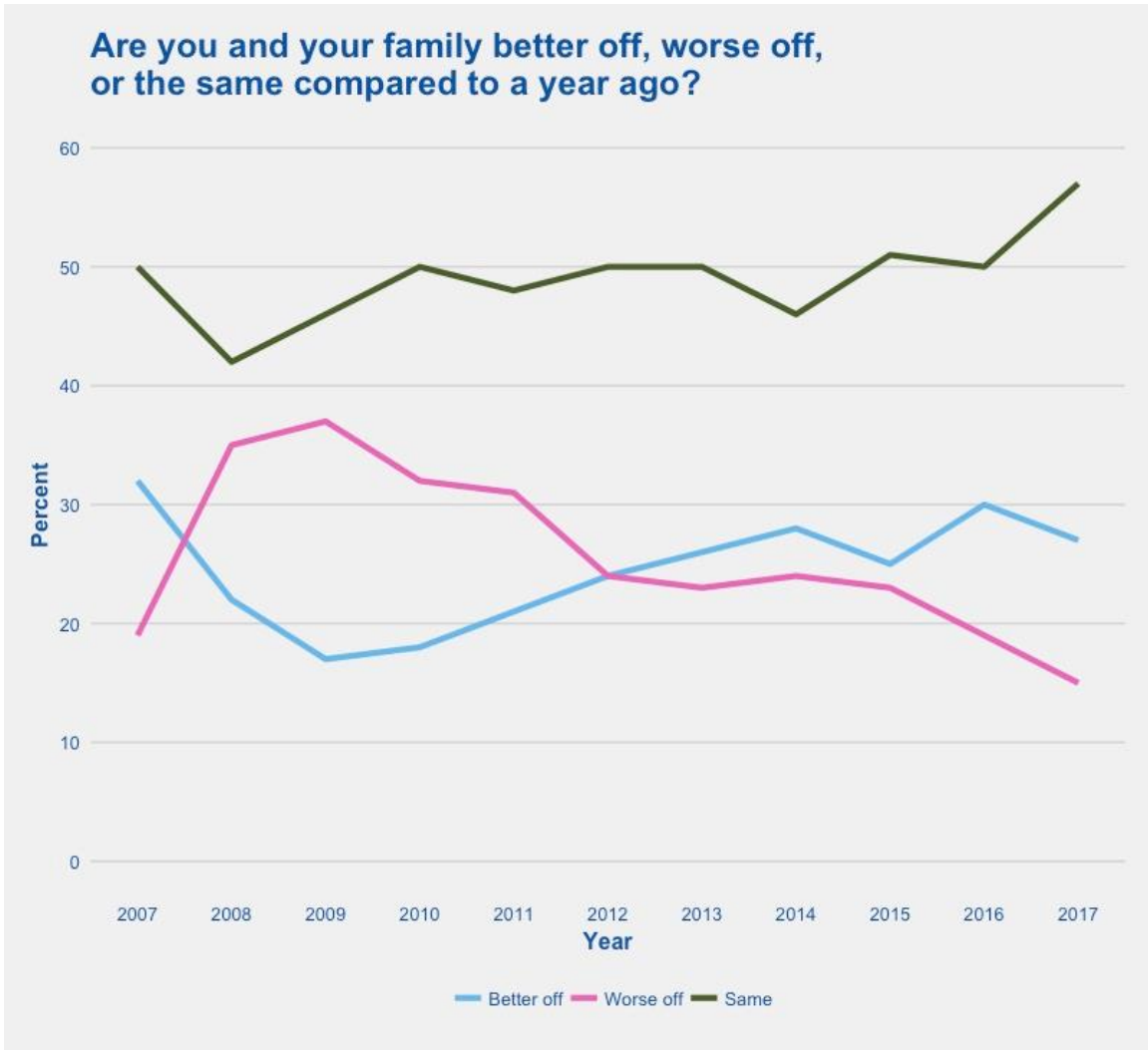
Thinking about the national economy, do you think the country is better off, worse off, or about the same compared to a year ago?



This sudden change in views is no doubt driven by partisanship, and the changing of party control over the White House. While 49% of Democrats say that things have remained the same, 60% of Republicans say that the economy is better off compared to a year ago. Last year, 50% of Democrats said the economy was better off, compared to only 15% this year. Last year 58% of Republican said that the economy was worse off, compared to only 6% this year.

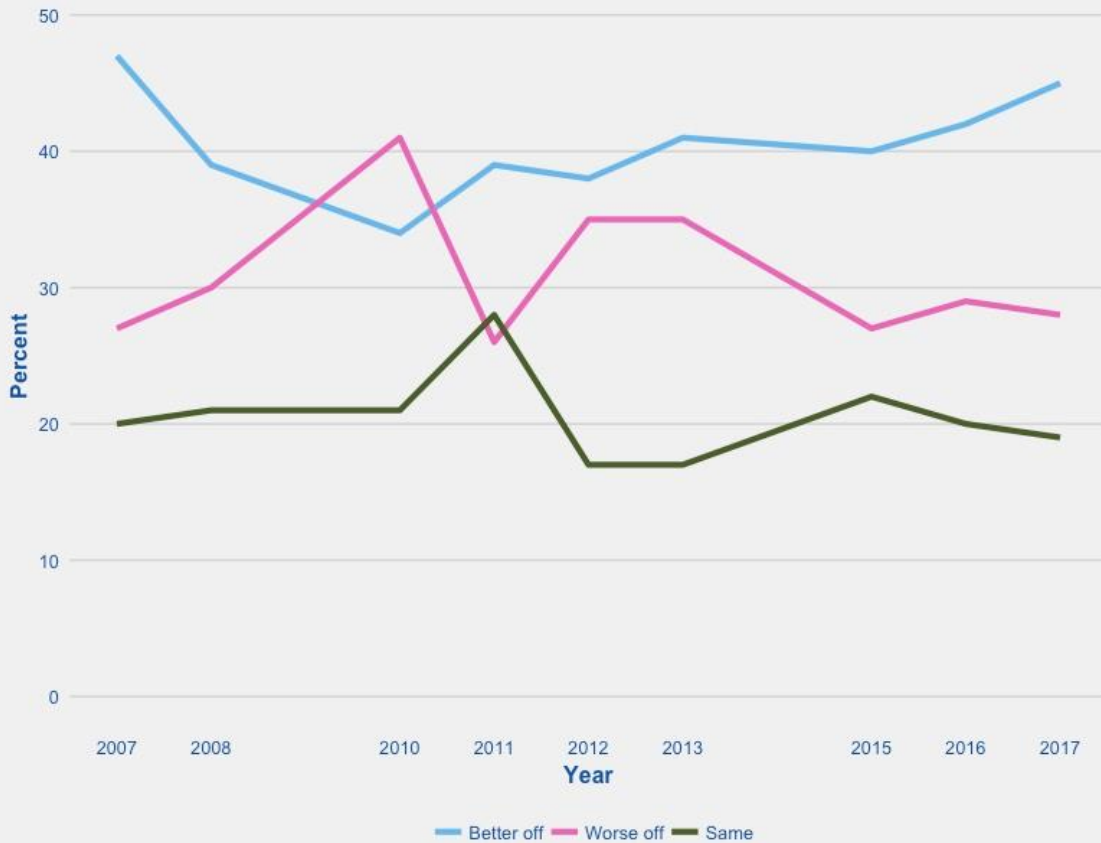


Despite less negative views of the national economy, and significantly more positive views among Texas Republicans, there was little change in people’s evaluations of their own personal economic situations. In 2016, 30% of Texans said that they were better off, compared to 27% in 2017, 19% said that they were worse off, compared to 15% today, and 50% said that their situation was essentially the same, compared to 57% today. Among partisans, majorities of Democrats (60%) and Republicans (57%) agree that their personal economic situation hasn’t changed.



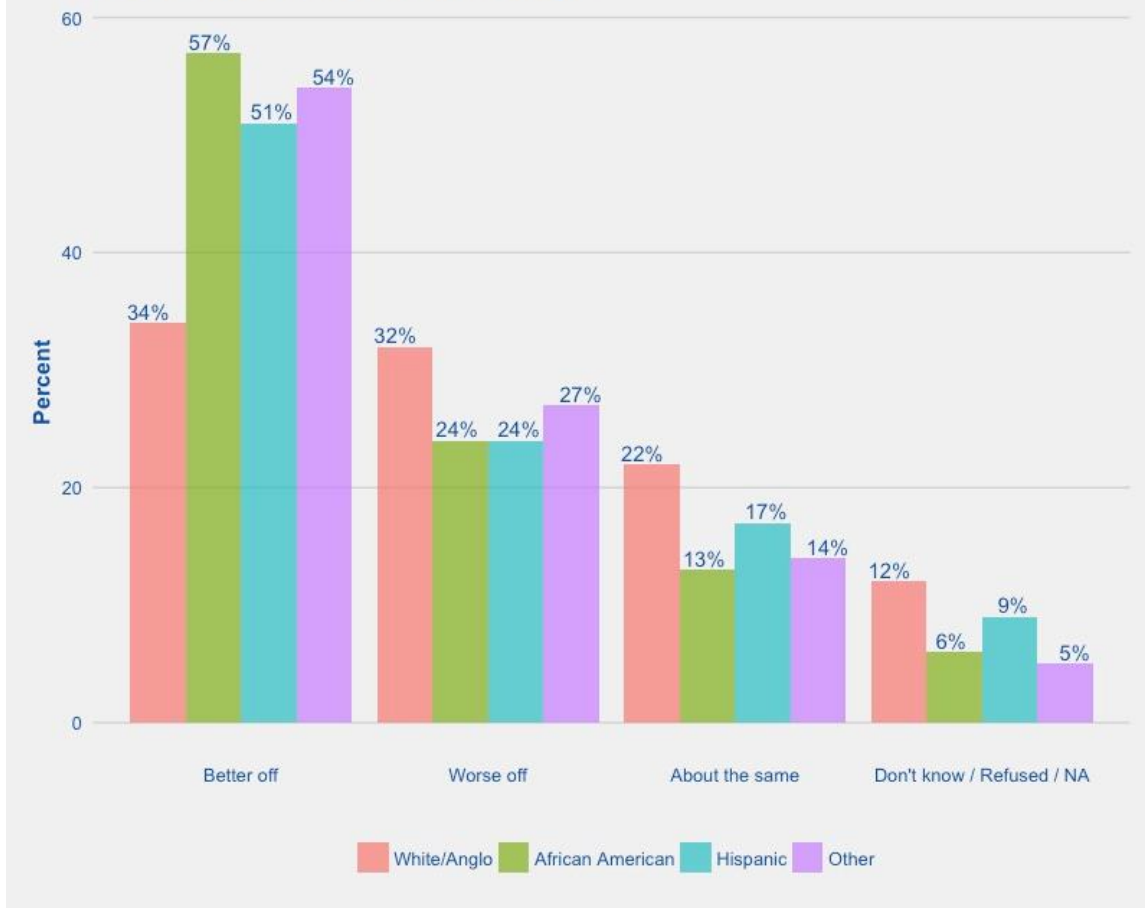
Consistent with the trend above, Texans' views on the economic prospects of their children remain unchanged from last year. A plurality still believe that their children will be better off (45%), while 28% think they will be worse off, and 19% believe that their economic situation will be about the same.

Looking ahead to the future, do you think your children will be better off than you are, worse off, or about the same economically?



Again, Democrats and Republicans view their children's futures similarly, while African American's (57%) and Hispanics (51%) are more likely than Whites (34%) to think that their children will be better off.

Looking ahead to the future, do you think your children will be better off than you are, worse off, or about the same economically?



Considering Texas specifically, 58% of Texas adults say that the state is doing better economically compared to a year ago, 9% say that it is doing worse, and 26% say that it is doing the same. Republicans are much more bullish on Texas' economy than are Democrats (71% to 49%), while White Texans are much more likely to say that the economy is better off (70%) than are black (46%) and Hispanic (48%) Texans.

NAFTA

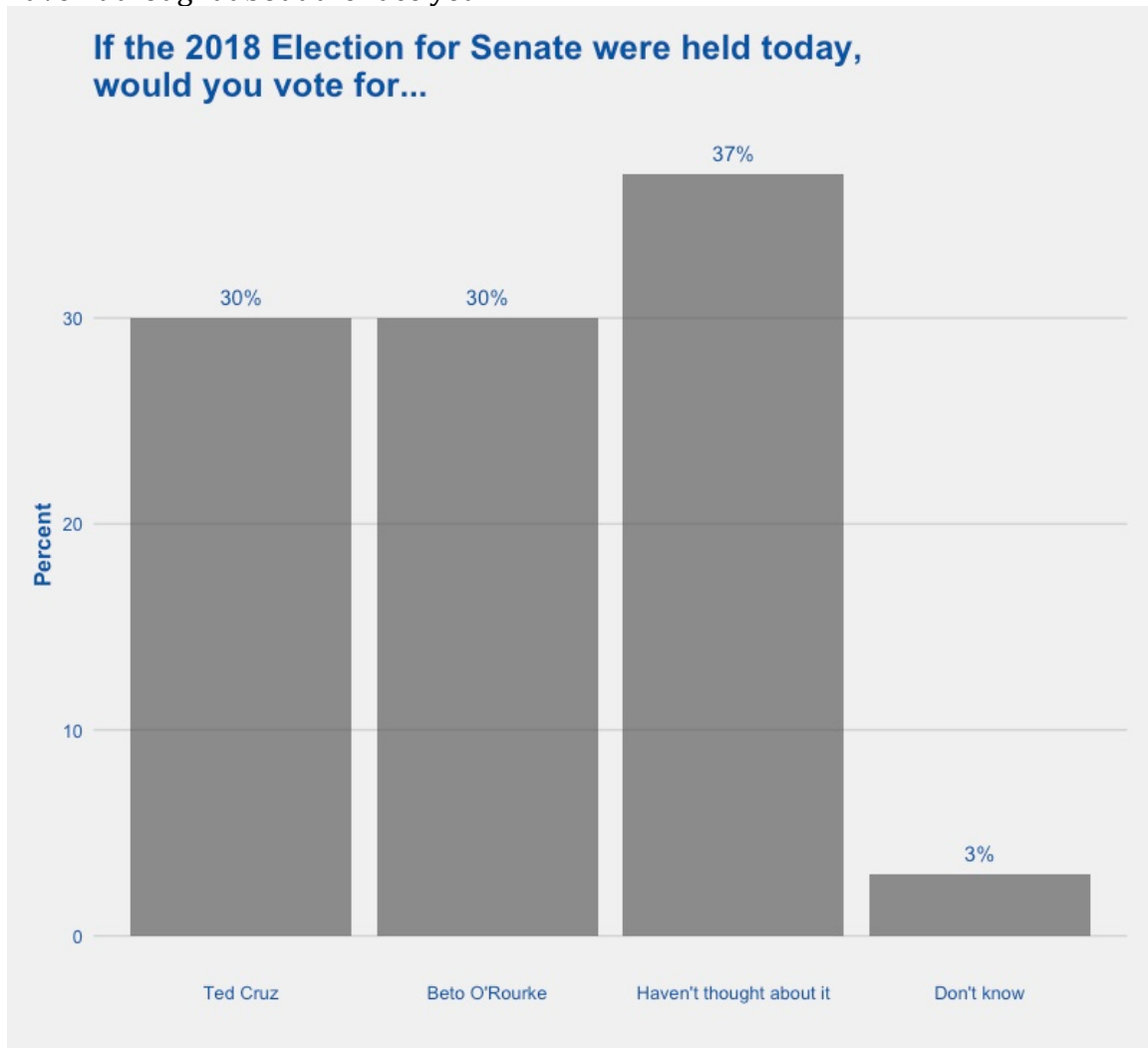
Given all the attention to international trade in the 2016 Presidential Election, we asked Texas adults whether “the North American Free Trade Agreement, known as NAFTA, has been good or bad for the Texas economy?” Overall, 43% of Texas adults say that NAFTA has been good for the Texas economy, 24% say that it has been bad, and 33% offered no opinion. These results were very similar to responses when we previously posed this question in 2009, when an equal share (43%) said that NAFTA had been good for the Texas economy, 28% said that it had been bad, and 29% had no opinion.

However, the trends in partisanship towards free trade that have lead Republicans to move away from what was, at one time, a cornerstone of their

outlook on international affairs, have influenced results for this polling item over time. In 2009, 41% of Republicans said that NAFTA had been good for the Texas economy while 30% said that it had been bad; in 2017, only 24% of Texas Republicans say that NAFTA has been good for Texas' economy, while 37% say that it has been bad. Democrats, on the other hand, are more favorable today towards the free trade agreement, with 59% saying that NAFTA has been good for Texas' economy, up 13-points from 46% in 2009.

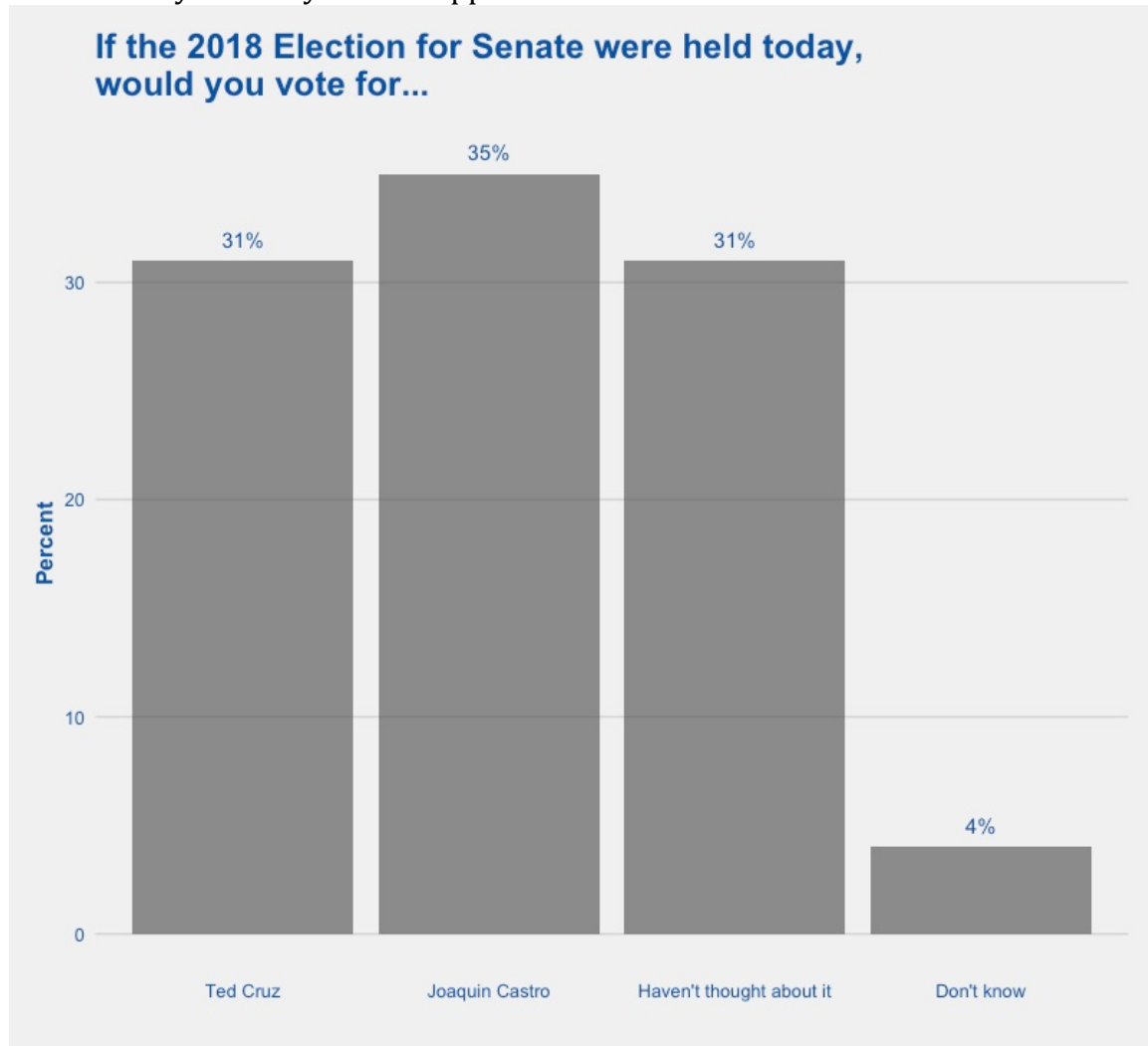
An Early Look at the 2018 Texas Elections

Looking ahead to the 2018 Elections, we asked registered voters (N = 890, MOE +/- 3.28%) about two potential U.S. Senate match-ups: Senator Ted Cruz versus Rep. Beto O'Rourke and Senator Ted Cruz versus rep. Joaquin Castro. At this very early stage, these results largely reflect name recognition and perhaps overall attitudes (especially negative attitudes) towards the incumbent (in this case, Senator Cruz). Against O'Rourke (who has officially entered the contest), Cruz and O'Rourke each garner 30%, with a plurality of Texas voters (37%) saying that they haven't thought about the race yet.



While this early result may feel like good news for Texas Democrats, among those who say that they haven't thought about the race yet, only 19% identify themselves as liberal, compared to 33% who identify as conservative, and 36% who identify as moderate.

Representative Castro fairs slightly better against the incumbent Senator, with 35% of Texas registrants saying that they would support him compared to 31% who say that they would support Cruz.



Again, among the 31% who haven't yet thought about the race, a plurality identify as conservative (36%), with 34% identifying as moderate, and only 17% identifying as liberal.

Finally, Lieutenant Governor Dan Patrick has an announced Democratic challenger in Mike Collier. When asked whom they would vote for in this race, 27% chose the little-known Collier compared to 25% who chose Lt. Gov. Patrick (though this difference is within the margin of error). Fully 46% of respondents hadn't thought about this race, and like the Senate races, that group skewed towards the conservative side of the ideological spectrum compared to the liberal side (32% to 17%).

Ballot tests conducted this far in advance of an actual election are, at best, useful in gauging the potential weaknesses of incumbents seeking re-election. But the substantial percentage of undecided respondents—coupled with the conservative, pro-Republican proclivities of the Texas electorate in recent years—suggest a cautious interpretation. Cruz and Patrick have a ways to go in winning back some Republican and independent voters, but their pathways to victory are well-trodden compared to the tangle facing their Democratic opponents.

Methodology

From April 3-9, 2017, The Texas Lyceum conducted a statewide telephone survey of adult citizens. The survey utilized a stratified probability sample design, with respondents being randomly selected at the level of the household. The survey also employed a randomized cell phone supplement, with 50 percent of completed interviews being conducted among cell phone only or cell phone dominant households. A Spanish-language instrument was developed and bilingual interviewers offered respondents a chance to participate in English or Spanish. On average, respondents completed the interview in 17 minutes. Approximately 6,100 records were drawn to yield 1,000 completed interviews. The final data set is weighted by race/ethnicity, age and gender to achieve representativeness as defined by the Texas Department State Health Services 2017 population projections. The overall margin of error for the poll is +/- 3.1 percentage points.

The Texas Lyceum

The Texas Lyceum has committed to annual probability samples of the state of Texas to bolster its understanding of public opinion on crucial policy issues. The professional rationale for the Texas Lyceum Poll is straightforward: a non-partisan, high quality, scientific survey designed to provide (1) specific data points on issues of interest, and (2) a time series of key demographics, attitudes, and opinions. Towards this end, the trademark of the Texas Lyceum Poll is transparency. Top-line and detailed cross-tabular results of each poll will be made available on the Texas Lyceum website at **www.texaslyceum.org**.

The Texas Lyceum, now 36 years strong, is a non-profit, non-partisan statewide leadership organization focused on identifying the next generation of Texas leaders. The Texas Lyceum consists of 96 men and women from throughout the state. Directors begin their service while under the age of 46 and have demonstrated leadership in their community and profession, together with a deep commitment to Texas.

The Texas Lyceum acts as a catalyst to bring together diverse opinions and expertise to focus on national and state issues, and seeks to emphasize constructive private sector, public sector, and individual responses to the issues.

To accomplish these purposes, the Lyceum conducts periodic public forums, commissions The Texas Lyceum Poll, and convenes programs for the Directors to explore and discuss key economic and social issues of the state and nation.

SECTION I:
GENERAL MOOD AND 2016 ELECTION ITEMS

Q1. Are you registered to vote in the state of Texas?

- | | |
|---------------------------|-----|
| 1. Yes, registered. | 89% |
| 2. No, not registered. | 11 |
| 3. DON'T KNOW/REFUSED/NA. | 0 |

Q2. Generally speaking, would you say that you are extremely interested in politics and public affairs, somewhat interested, not very interested, or not at all interested?

- | | |
|---------------------------|-----|
| 1. Extremely interested. | 39% |
| 2. Somewhat interested. | 44 |
| 3. Not very interested. | 11 |
| 4. Not at all interested. | 6 |
| 5. DON'T KNOW/REFUSED/NA. | 0 |

Q4. Thinking about the country, do you think things are moving in the right direction or are we off on the wrong track?

- | | |
|----------------------------|-----|
| 1. Right direction. | 34% |
| 2. Off on the wrong track. | 52 |
| 3. DON'T KNOW/REFUSED/NA. | 14 |

Q5. What do you think is the most important issue facing the country today? [OPEN-ENDED]

1. Immigration	13%
2. The economy	11
3. Political corruption/leadership	10
4. Health care	10
5. National security/terrorism	7
6. Unemployment/jobs	5
7. Race relations/racial issues/ethnicity	5
8. Education	3
9. Foreign affairs/policy	3
10. Unity / Division of country	3
11. Social welfare programs	2
12. Federal spending/budget deficit	1
13. National debt	1
14. Moral decline	1
15. Border security	1
16. Taxes	1
17. Environment	1
18. Middle East unrest	1
19. Polarization/Gridlock/Partisanship	1
20. Police	1
21. Gender equality	1
22. Civil Rights/Freedom	1
23. Wars / less military intervention overseas	1
24. Other (specify)	7
25. Don't know / No response	7

Q6. What do you think is the most important issue facing the state of Texas today? [OPEN-ENDED]

1. Immigration	21%
2. Education	13
3. Border security	6
4. The economy	5
5. Political corruption/leadership	5
6. Health care	5
7. Unemployment/jobs	4
8. Taxes	2
9. Transgender/bathroom law	2
10. Crime and drugs	1
11. State government spending (i.e. too much spending)	1
12. Moral decline	1
13. Social welfare programs	1
14. Water supply	1
15. Energy	1
16. Transportation/roads/traffic	1
17. Gun violence/gun control	1
18. Population growth	1
19. Other (specify)	10
20. Don't know / No response	17

Q7. How well do you think Donald Trump is handling his job as president? Is he doing a very good job, somewhat good job, somewhat poor job, or very poor job?

- | | |
|------------------------------|-----|
| 1. Very good job. | 19% |
| 2. Somewhat good job. | 24 |
| 3. Somewhat poor job. | 18 |
| 4. Very poor job. | 36 |
| 5. DON'T KNOW / REFUSED / NA | 4 |

Q8. Would you say that you approve or disapprove of the job that Greg Abbott is doing as Texas governor? Would that be somewhat or strongly approve/disapprove?

- | | |
|------------------------------|-----|
| 1. Strongly approve | 27% |
| 2. Somewhat approve | 26 |
| 3. Somewhat disapprove | 12 |
| 4. Strongly disapprove | 18 |
| 5. DON'T KNOW / REFUSED / NA | 17 |

Q8A. Would you say that you approve or disapprove of the job that Dan Patrick is doing as Texas's Lieutenant Governor? Would that be somewhat or strongly approve/disapprove?

- | | |
|------------------------------|-----|
| 1. Strongly approve | 11% |
| 2. Somewhat approve | 27 |
| 3. Somewhat disapprove | 13 |
| 4. Strongly disapprove | 19 |
| 5. DON'T KNOW / REFUSED / NA | 30 |

Thinking ahead to the 2018 Elections... [Q9-Q11 WEREASKED ONLY OF REGISTERED VOTERS. N = 890, MOE +/- 3.28%] [RANDOMIZE Q9A-Q9B]

Q9A. If the 2018 election for Senate were held today, would you vote for [RANDOMIZE] the Republican Ted Cruz [PRONOUNCED: CRUISE], the Democrat Beto O'Rourke [PRONOUNCED: BET-TOE O-RORK], or haven't you thought enough about it?

- | | |
|------------------------------------|-----|
| 1. Ted Cruz | 30% |
| 2. Beto O'Rourke | 30 |
| 3. Haven't thought enough about it | 37 |
| 4. DON'T KNOW / REFUSED / NA | 3 |

Q9B. If the 2018 election for Senate were held today, would you vote for [RANDOMIZE] the Republican Ted Cruz [PRONOUNCED: CRUISE], the Democrat Joaquin Castro [PRONOUNCED: WAH-KEEN CASTRO], or haven't you thought enough about it?

- | | |
|------------------------------------|-----|
| 1. Ted Cruz | 31% |
| 2. Joaquin Castro | 35 |
| 3. Haven't thought enough about it | 31 |
| 4. DON'T KNOW / REFUSED / NA | 4 |

Q10. If the 2018 election for Lieutenant Governor were held today, would you vote for [RANDOMIZE] the Republican Dan Patrick, the Democrat Mike Collier [PRONOUNCED: MIKE CALL-EE-ER], or haven't you thought enough about it?

- | | |
|------------------------------------|-----|
| 1. Dan Patrick | 25% |
| 2. Mike Collier | 27% |
| 3. Haven't thought enough about it | 46% |
| 4. DON'T KNOW / REFUSED / NA | 3 |

Q11. Suppose the Tea Party movement organized itself as a political party. When thinking about the next election for Congress, would you vote for [Randomize] the Republican candidate from your district, the Democratic candidate from your district, or the Tea Party candidate from your district?
[Randomize 1-2]

- | | |
|-------------------------|-----|
| 1. Republican candidate | 25% |
| 2. Democratic candidate | 43 |
| 3. Tea Party candidate | 9 |
| 4. Don't know | 23 |

SECTION II:
PERSONAL ECONOMIC PERCEPTIONS

Q18. Thinking about the national economy, do you think the country is better off, worse off, or about the same compared to a year ago?

- | | |
|---------------------------|-----|
| 1. Better off. | 32% |
| 2. Worse off. | 20 |
| 3. About the same. | 44 |
| 4. DON'T KNOW/REFUSED/NA. | 4 |

Q19. Now thinking about you and your family's economic situation, would you say that you are better off, worse off, or about the same economically compared to a year ago?

- | | |
|---------------------------|-----|
| 1. Better off. | 27% |
| 2. Worse off. | 15 |
| 3. About the same. | 57 |
| 4. DON'T KNOW/REFUSED/NA. | 1 |

Q20. Do you think Texas's economy is better off, worse off, or about the same as the rest of the country?

- | | |
|------------------------------|-----|
| 1. Better off | 58% |
| 2. Worse off | 9% |
| 3. About the same | 26 |
| 4. DON'T KNOW / REFUSED / NA | 7 |

Q21. Looking ahead to the future, do you think your children will be better off than you are, worse off, or about the same economically?

- | | |
|------------------------------|-----|
| 1. Better off | 45% |
| 2. Worse off | 28 |
| 3. About the same | 19 |
| 4. DON'T KNOW / REFUSED / NA | 9 |

Q40. *Would you say that the North American Free Trade Agreement, known as NAFTA, has been good or bad for the Texas economy?*

- | | |
|-------------------------------------|-----|
| 1. <i>Good</i> | 43% |
| 2. <i>Bad</i> | 24 |
| 3. <i>DON'T KNOW / REFUSED / NA</i> | 33 |