

TEXAS PULSE

A stylized blue pulse line graphic that starts as a horizontal line, dips into a sharp V-shape, and then rises back to a horizontal line, passing through the letters 'P' and 'L' of 'PULSE'.

SEPTEMBER 2018

CROSSWIND

It is my pleasure to present the detailed results of the latest edition of the Texas Pulse, a periodic survey of Texans' opinions on a variety of cultural, economic and political issues. This edition was conducted by Crosswind Media & Public Relations from September 6-9, 2018 using a survey of 800 likely Texas voters.

With only a few short weeks until mid-term elections, the 2018 Texas Pulse reveals some surprising results which have national implications. In the race for U.S. Senate, Democrat Beto O'Rourke is gaining significant ground on Republican Ted Cruz, polling within 3 percentage points of the incumbent with a 4 point margin of error -- it's essentially neck and neck at this point. Also a new trend we see emerge is the importance of the younger voting block, specifically Texans between the ages of 18 - 39. Of this subset, 49 percent support O'Rourke, while Cruz's strongest support comes from voters ages 40 and above.

Perhaps most surprising is that in both races, a percentage of likely voters identifying as "conservative" seem ready to jump ship to non-conservative candidates: 14 percent for O'Rourke, and 16 percent for Democratic gubernatorial candidate Lupe Valdez. Those identifying as "liberal" seem less inclined to go against those stated values, with just 3 percent for Cruz and 6 percent for incumbent Gov. Abbott.

As always, the survey also polled respondents about their most pressing concerns, from the economy to social issues. We track these trends year to year to determine changes in attitude and ever-shifting priorities of the general public.

The election year makes for an interesting Texas Pulse, to be sure, but other polls about the upcoming elections abound this year as well. The Texas Pulse is different, because Texans are different. We hone in on issues that matter to Texas, because what Texans think matters. As of 2016, Texas is home to four of the top 50 companies on the Fortune 500, and home to 54 overall. Texas grossed more than \$279.69 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.

The Texas Pulse is intended to provide a guide for those who seek to understand and do business in Texas. We know how Texans think, so please contact us for any additional questions or information.



Thomas Graham
President & CEO

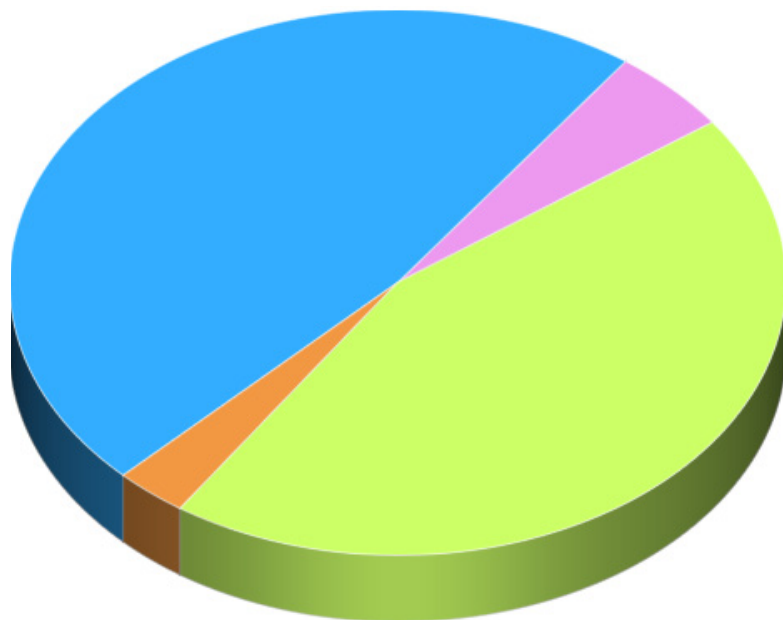
TEXASPULSE

SEPTEMBER 2018

The Texas Pulse, a periodic survey of Texans' views on a variety of cultural, economic and political issues, was conducted September 6 -- 9, 2018 by Crosswind Media and Public Relations. The poll surveyed Democrats and Republicans separately. Of the 800 likely voters surveyed, 39 percent identified Republican and 27 percent identified Democrat, with 34 percent unidentified. The margin of error is +/- 4 percentage points.

Overall, the poll has a 95 percent level of confidence, meaning that if an identical survey was conducted under the same circumstances, it would generate a result within the same margin of sampling errors 19 times out of 20. A 2014 Texas Pulse survey was recognized by the *Houston Chronicle* as the most accurate poll in the governor's race.

U.S. Senate: Beto O'Rourke vs. Ted Cruz



US SENATE	
Ted Cruz	47%
Beto O'Rourke	44%
Not sure	5%
Other Candidate	3%

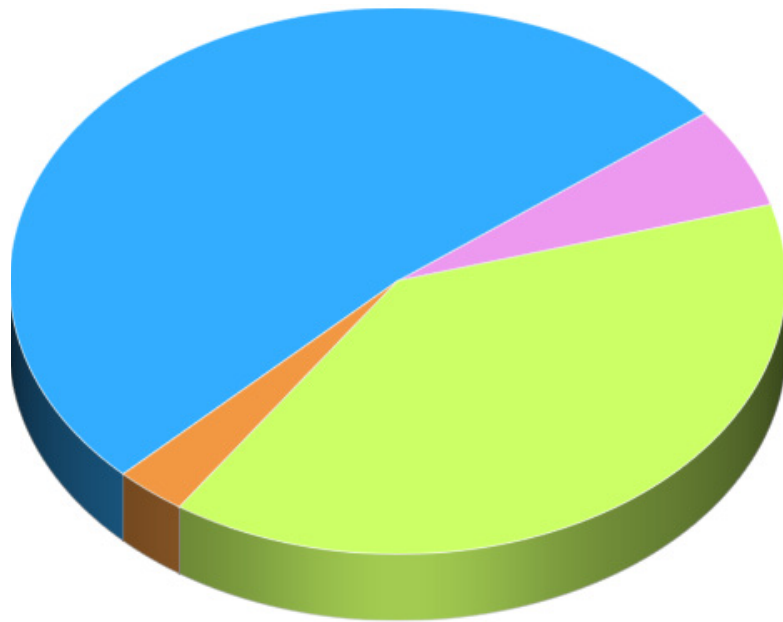
In a sign of just how crucial the millennial vote might be in the upcoming mid-term elections, a statewide poll released Tuesday shows Ted Cruz leading 47 percent to Beto O'Rourke's 44 percent among likely Texas voters. Forty-nine percent of Texans between the ages of 18-39 identify as supporting O'Rourke, while Cruz's strongest support comes from voters ages 40 and above.

The Crosswind Texas Pulse Poll also hinted at some dissatisfaction toward Cruz from his own party: While the poll indicates an almost-equal party vote – with 81 percent Republicans favoring Cruz and 83 percent Democrats for his opponent – a surprising 15 percent of Republicans indicated their intent to vote for the Democrat. Forty-six percent of

respondents who did not identify with either major party signaled their intent to vote for O'Rourke, versus 39 percent of non-affiliated or independent voters intending to pull the lever for Cruz.

Fifty-five percent of Hispanic voters and 57 percent of Black voters also expressed an intent to vote for O'Rourke, while 52 percent of white voters indicated their support for Cruz. However, 56 percent of voters who do not identify as white, Hispanic or Black also responded positively for Cruz. Only slightly more women overall support O'Rourke than Sen. Cruz, at 47 versus 42 percent.

Texas Governor: Greg Abbott vs. Lupe Valdez

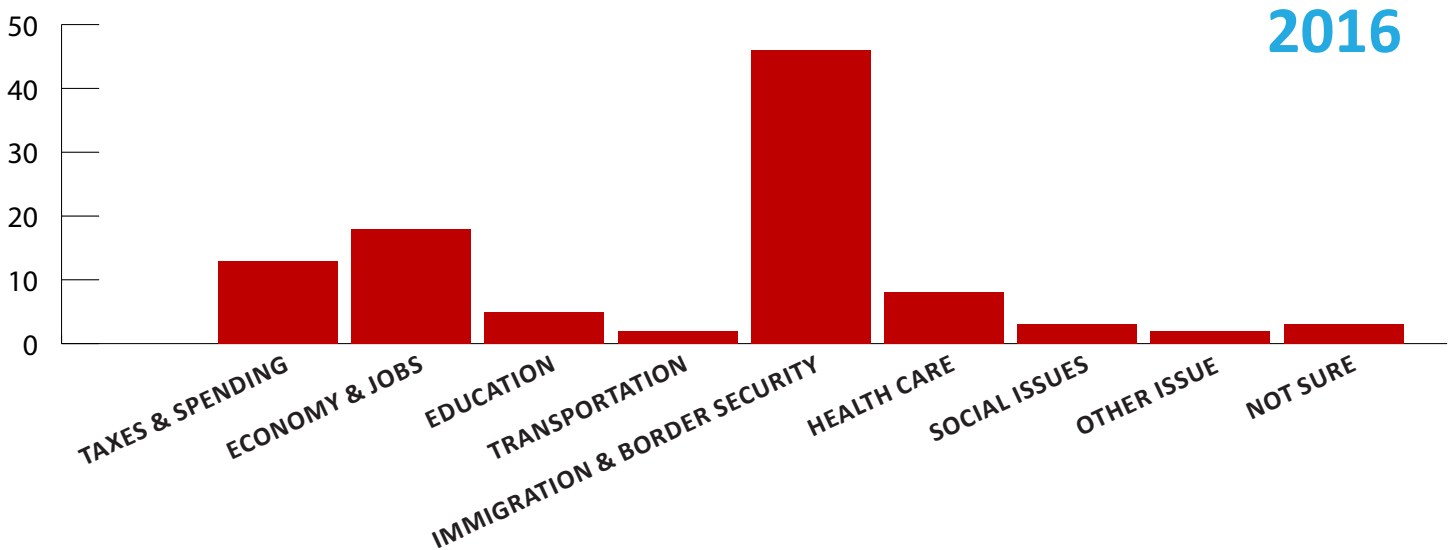
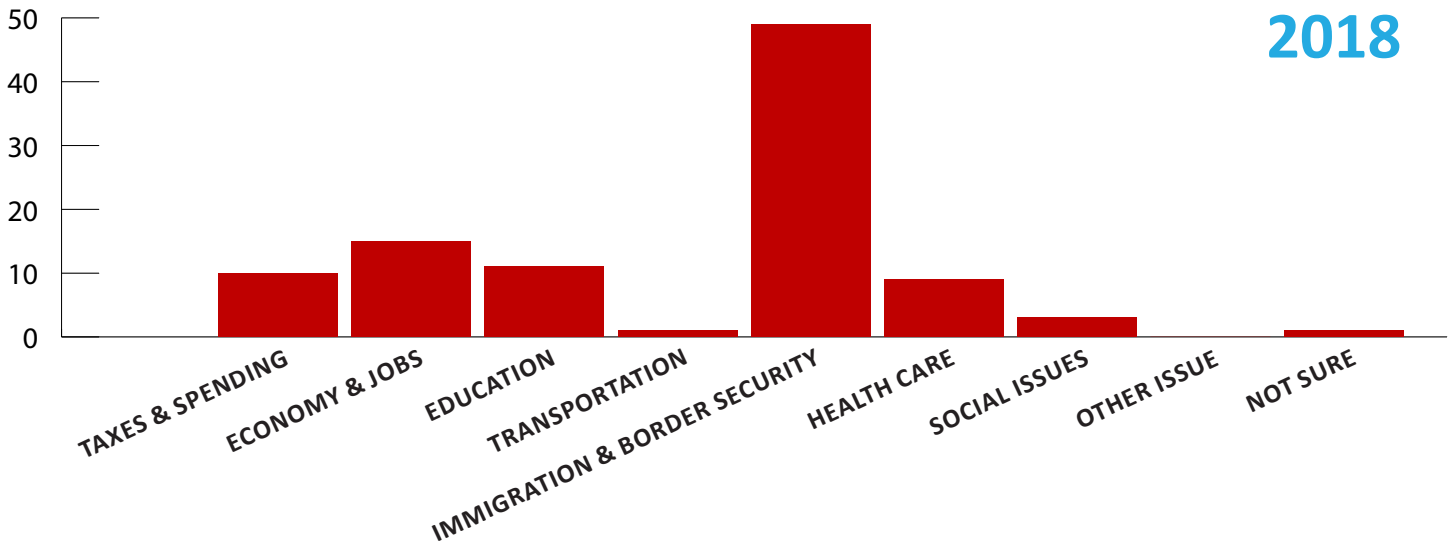


TEXAS GOVERNOR	
Greg Abbott	52%
Lupe Valdez	39%
Not Sure	6%
Other Candidate	3%

Texans clearly favor incumbent Greg Abbott, who is holding steadily in his race against Lupe Valdez, although her 39 percent – to Abbott’s 52 percent – is likely to catch state GOP leaders by surprise. The poll results largely mirrored that of the senate race demographically and along party affiliations, although 45 percent of Texas women are showing more support for the current governor than for challenger Valdez’s 43 percent female support.

Among voters who do not identify as either Democrat or Republican, 47 percent seem more inclined to identify with Abbott on election day, versus 36 percent for Valdez.

Most Important Issues Facing Texas: Republican

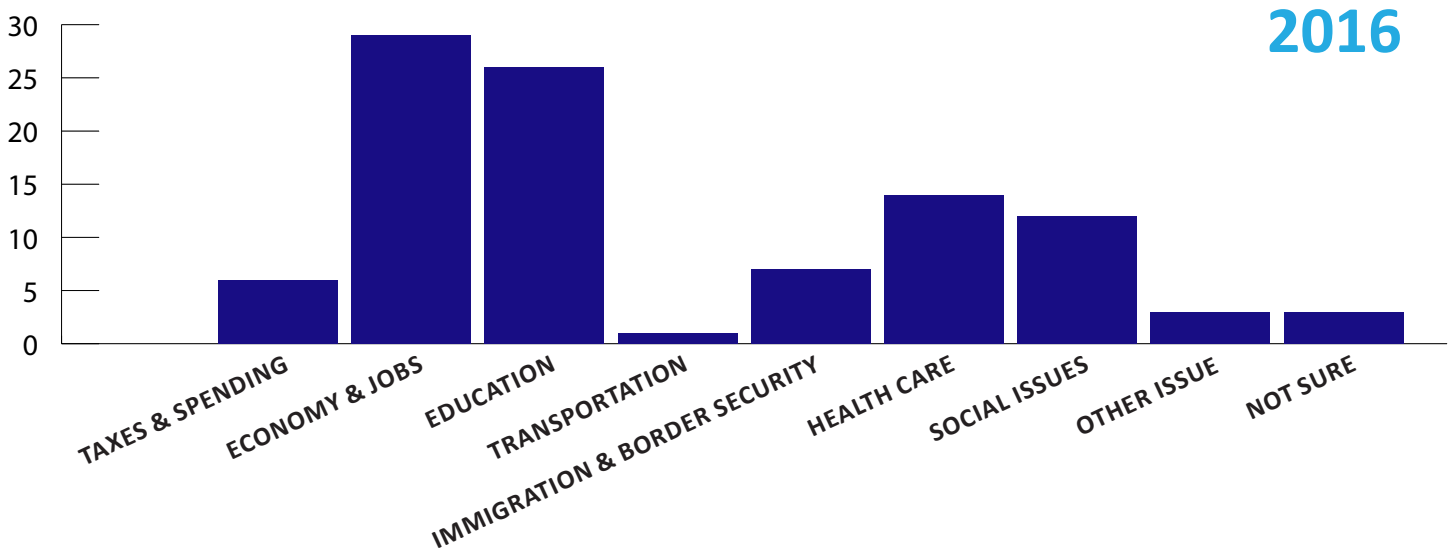
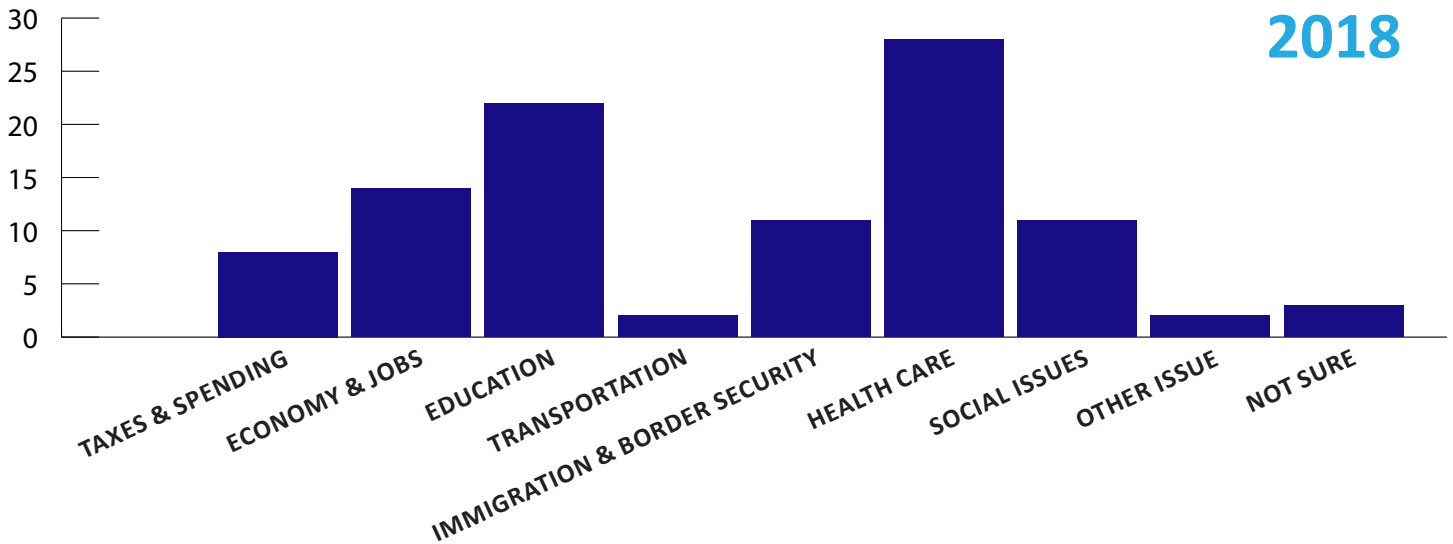


Asked about the most important issues facing Texas, the state's likely voters mirrored responses from the 2016 Texas Pulse Poll, with 33 percent overall naming immigration and border security as the top issue. This is 4 percent higher than that issue's ranking in the 2016 poll. However, we saw 24 percent of all likely voters naming the economy and jobs as their second most important issue in 2016, while this year health care and

education came in as the #2 and #3 issues, respectively. When results are broken out separately, they are as follows:

Among likely voters who identified as Republican, priorities remained largely unchanged – continuing to name immigration and border security as their top concern.

Most Important Issues Facing Texas: Democrat



Among voters who identified as Democrat, however, priorities have shifted over the last two years. In 2016, the economy and jobs as well as education were the overwhelming issues of interest, while Democratic voters today expressed greater concern over health care and education, with social issues and immigration remaining a top concern as well.