METROPOLITAN TRANSPORTATION COMMISSION

EMC research

NOTICE: This document is not screen-reader compatible. We are working with our consultant to create an accessible version. If you need assistance reading this document before then, please contact Marcella Aranda at maranda@bayareametro.gov. A verbal presentation of the poll results will be made at the December 8, 2023 Legislation Committee meeting which can be streamed live or afterwards at https://mtc.ca.gov/.

Bay Area Regional Transportation Effort Voter Survey: Executive Summary

October 2023

Joint MTC ABAG Legislation Committee
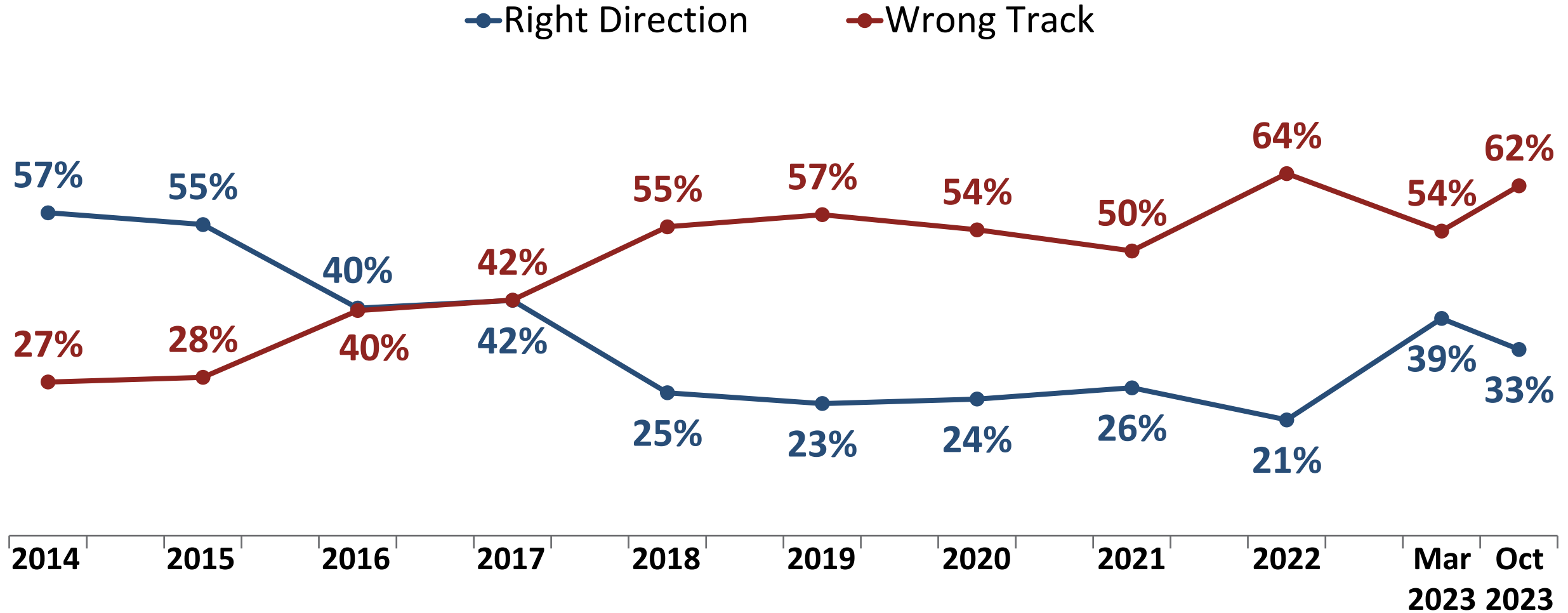
December 8, 2023

Handout

Methodology

EMC research

- Survey of 9-County Bay Area registered voters

- Conducted October 16 – 31, 2023

- 2,700 total responses; overall margin of error ±1.89 percentage points at the 95% confidence interval

- Multi-modal methodology using live telephone interviews and email/text invitations to an online survey

- Available in English, Spanish, and Chinese

- Where applicable, results are compared to similar survey conducted March 2023

Please note that due to rounding, some percentages may not add up to exactly 100%.

Direction of the Bay Area

Bay Area voters continue to be very pessimistic.

●— Right Direction   ●— Wrong Track

Right Direction: 57% (2014), 55% (2015), 40% (2016), 42% (2017), 25% (2018), 23% (2019), 24% (2020), 26% (2021), 21% (2022), 39% (Mar 2023), 33% (Oct 2023)

Wrong Track: 27% (2014), 28% (2015), 40% (2016), 42% (2017), 55% (2018), 57% (2019), 54% (2020), 50% (2021), 64% (2022), 54% (Mar 2023), 62% (Oct 2023)

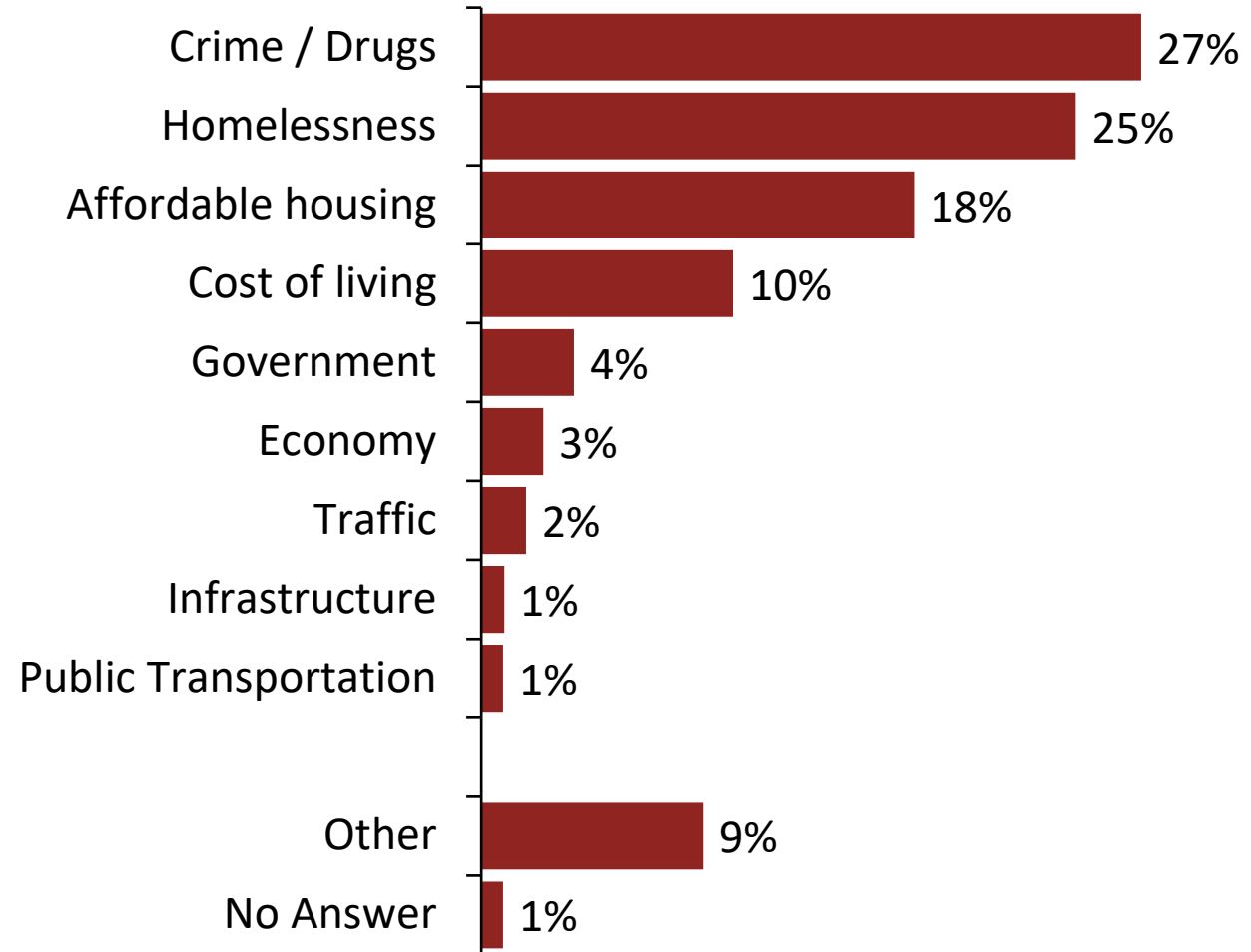2014 2015 2016 2017 2018 2019 2020 2021 2022 Mar 2023 Oct 2023

Do you feel things in the Bay Area are going in the right direction or do you feel things have gotten pretty seriously off on the wrong track? 2014-2022 source: Bay Area Council, Bay Area Poll

Most Important Problem

Traffic and transportation are top of mind issues for only a few.

What do you think is the most important problem facing the Bay Area today?

Category	Percent
Crime / Drugs	27%
Homelessness	25%
Affordable housing	18%
Cost of living	10%
Government	4%
Economy	3%
Traffic	2%
Infrastructure	1%
Public Transportation	1%
Other	9%
No Answer	1%

(Open-ended question; verbatim responses coded into categories shown)

Transit Ridership

Although few voters report being daily riders, about half say they use transit at least occasionally.

Weekly+ Transit Riders (17%)
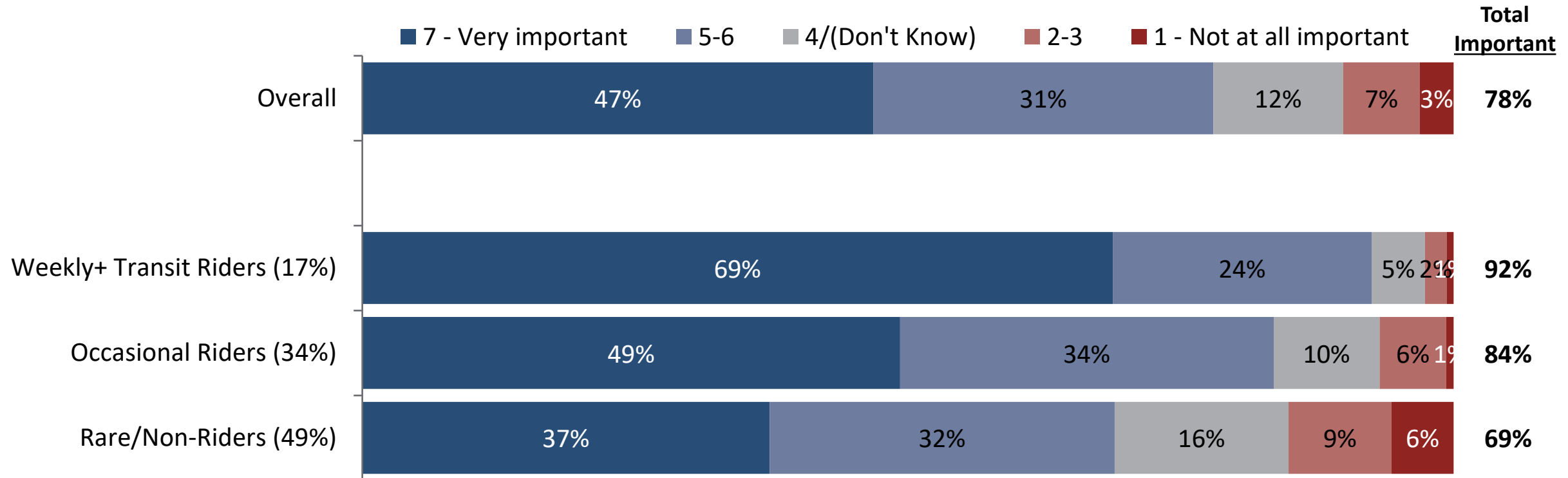
Occasional Riders (34%)

| Daily Riders 5% | Weekly Riders 13% | Monthly Riders 14% | Less than Monthly Riders 20% | Rare/Non-Riders 49% |
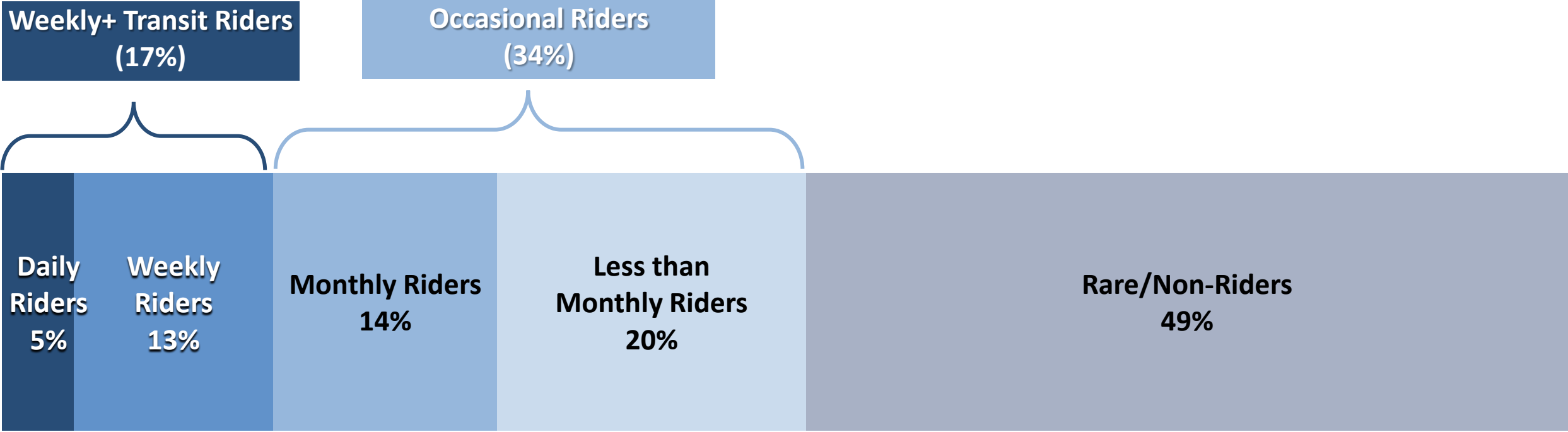
Importance of Public Transit

Public transit is important to most, even those who don't use it.

How important would you say public transit is for the Bay Area?

Legend:
- ■ 7 - Very important
- ■ 5-6
- ■ 4/(Don't Know)
- ■ 2-3
- ■ 1 - Not at all important

Total Important

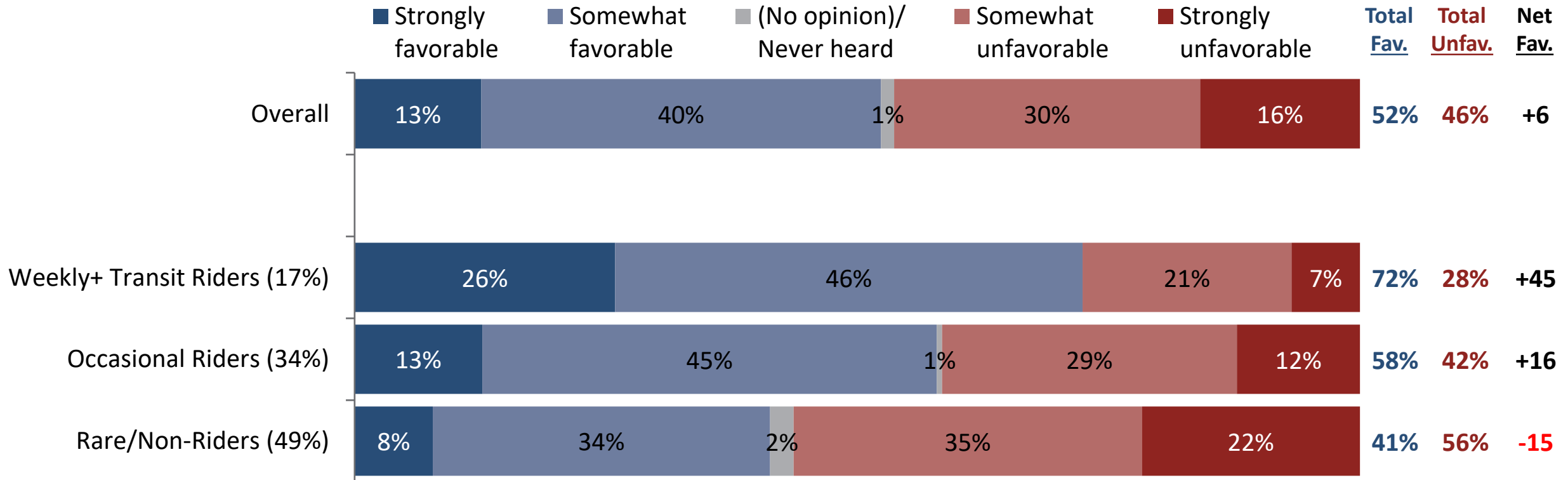| Category	7 - Very important	5-6	4/(Don't Know)	2-3	1 - Not at all important	Total Important
Overall	47%	31%	12%	7%	3%	**78%**
Weekly+ Transit Riders (17%)	69%	24%	5%	2%	1%	**92%**
Occasional Riders (34%)	49%	34%	10%	6%	1%	**84%**
Rare/Non-Riders (49%)	37%	32%	16%	9%	6%	**69%**

Public Transit Favorability

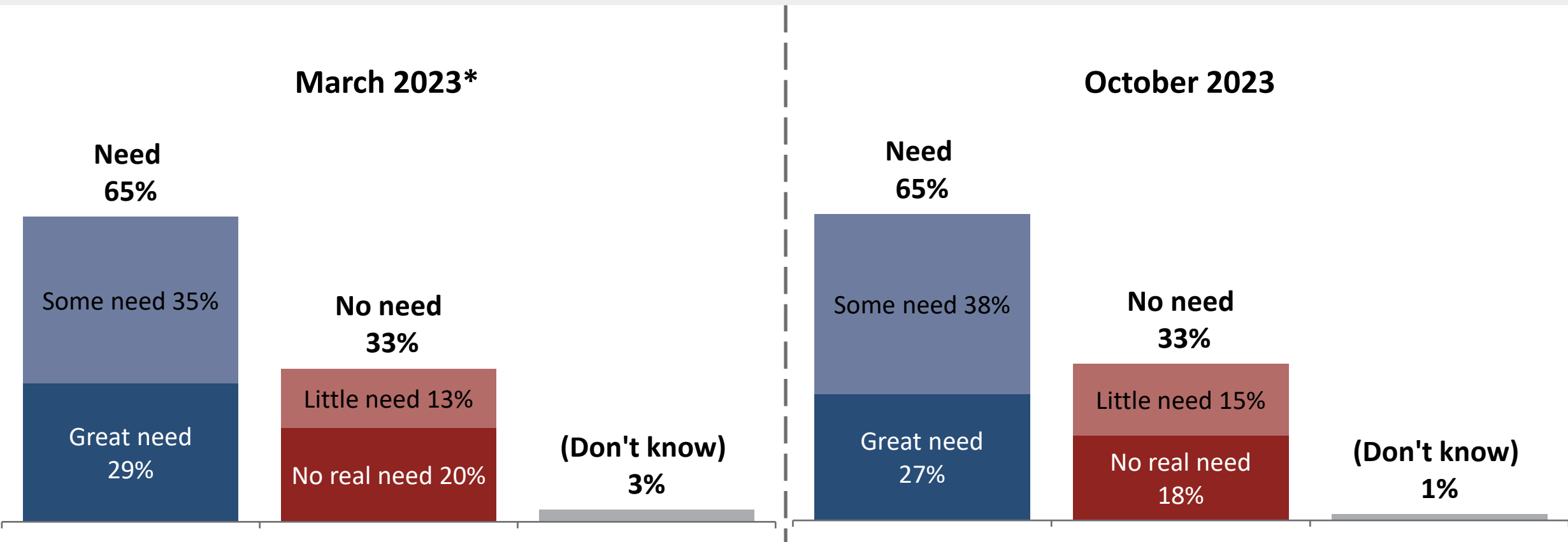*While frequent riders are generally positive, many others have negative perceptions of local transit.*

In general, would you say you have a favorable or unfavorable opinion of public transit in the Bay Area?

	■ Strongly favorable	■ Somewhat favorable	■ (No opinion)/ Never heard	■ Somewhat unfavorable	■ Strongly unfavorable	Total Fav.	Total Unfav.	Net Fav.
Overall	13%	40%	1%	30%	16%	**52%**	**46%**	**+6**
Weekly+ Transit Riders (17%)	26%	46%		21%	7%	**72%**	**28%**	**+45**
Occasional Riders (34%)	13%	45%	1%	29%	12%	**58%**	**42%**	**+16**
Rare/Non-Riders (49%)	8%	34%	2%	35%	22%	**41%**	**56%**	**-15**

Need for Transportation Funding

Nearly two-thirds continue to see a need for increased funding for Bay Area transportation.

Please tell me if you think there is a great need for more money, some need for more money, little need for more money, or no real need for more money to address transportation in the Bay Area?

March 2023*

Need 65%
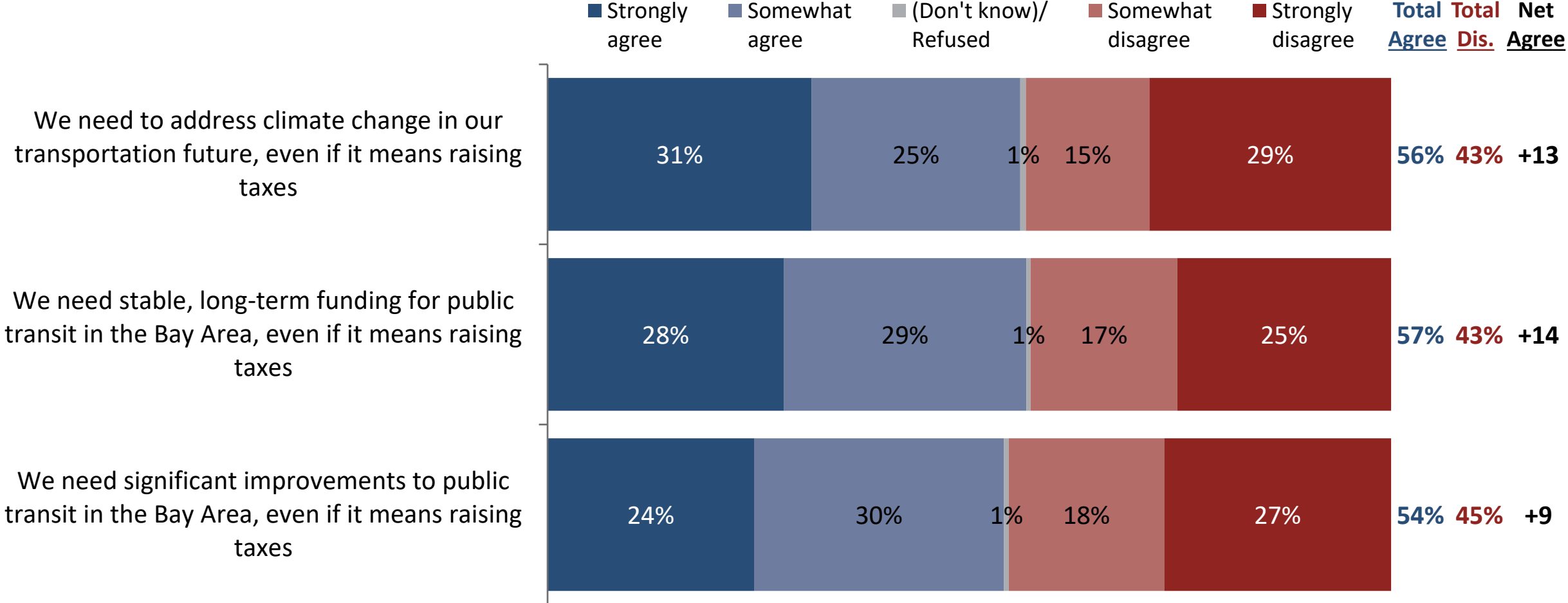- Some need 35%
- Great need 29%

No need 33%
- Little need 13%
- No real need 20%

(Don't know) 3%

October 2023

Need 65%
- Some need 38%
- Great need 27%

No need 33%
- Little need 15%
- No real need 18%

(Don't know) 1%

Tax Attitudes

A majority of voters are willing to consider a tax increase to fund transportation needs.

	Strongly agree	Somewhat agree	(Don't know)/ Refused	Somewhat disagree	Strongly disagree	Total Agree	Total Dis.	Net Agree
We need to address climate change in our transportation future, even if it means raising taxes	31%	25%	1%	15%	29%	**56%**	**43%**	**+13**
We need stable, long-term funding for public transit in the Bay Area, even if it means raising taxes	28%	29%	1%	17%	25%	**57%**	**43%**	**+14**
We need significant improvements to public transit in the Bay Area, even if it means raising taxes	24%	30%	1%	18%	27%	**54%**	**45%**	**+9**

Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.

Transportation Revenue Measure

A slight majority of voters support the revenue measures tested.

To improve safety and cleanliness on BART and other local public transit; reduce Bay Area traffic; expand and improve bus, BART, light rail, ferry and train service reliability and convenience; reduce greenhouse gas emissions; repair potholes; make transit easier and more affordable to use and make streets safer for walking and biking...

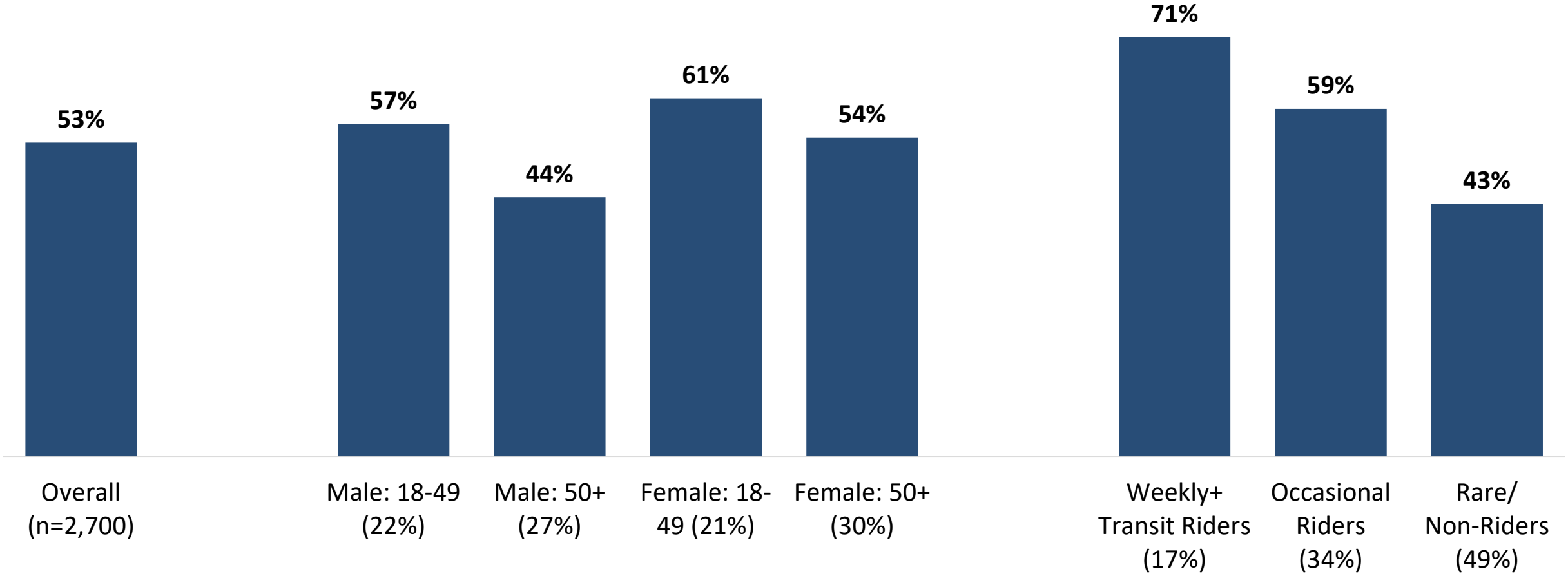| **Sales Tax**	**Income Tax**	**Payroll Tax**
...shall the measure enacting a **half-cent sales tax** for 30 years generating approximately $1 billion annually, subject to oversight and audits, be adopted?	...shall the measure enacting a **0.17% income tax** for 30 years generating approximately $1 billion annually, subject to oversight and audits, be adopted?	...shall the measure enacting **a payroll tax of 0.36%** for 30 years generating approximately $1 billion annually, subject to oversight and audits, be adopted?
55% Yes	**51% Yes**	**55% Yes**

Combined Measure Support by Subgroups

% Yes

	% Yes
Overall (n=2,700)	53%
Male: 18-49 (22%)	57%
Male: 50+ (27%)	44%
Female: 18-49 (21%)	61%
Female: 50+ (30%)	54%
Weekly+ Transit Riders (17%)	71%
Occasional Riders (34%)	59%
Rare/ Non-Riders (49%)	43%

Margin of error for each subgroup shown ranges up to ± 4.5 percentage points
Measure support aggregated across all three revenue mechanisms tested

Combined Measure Support by Region

% Yes

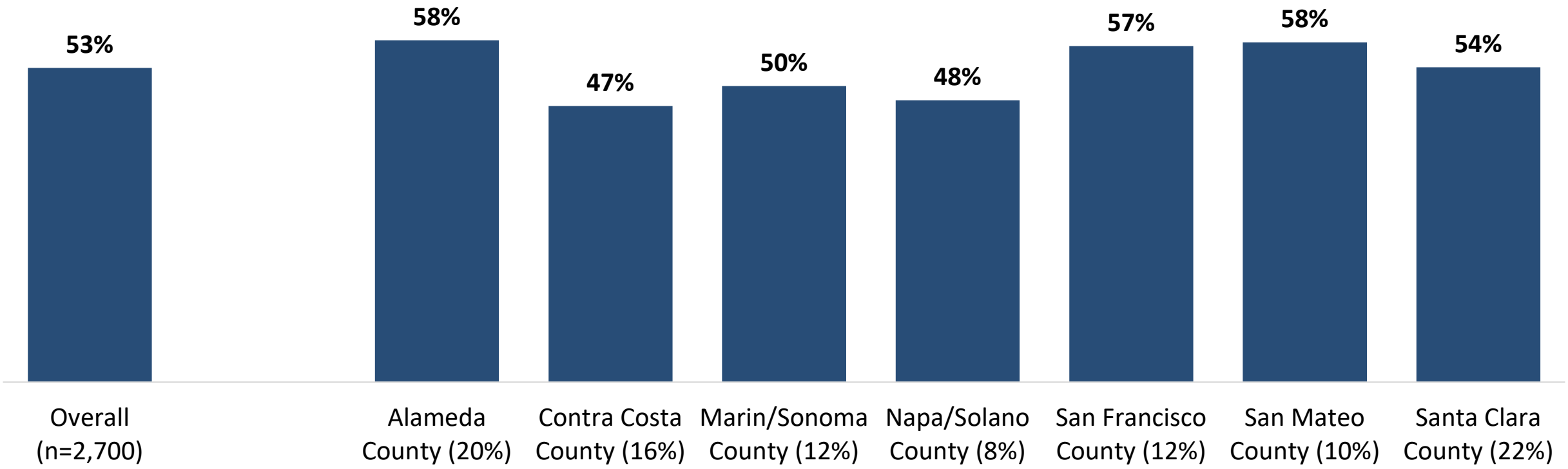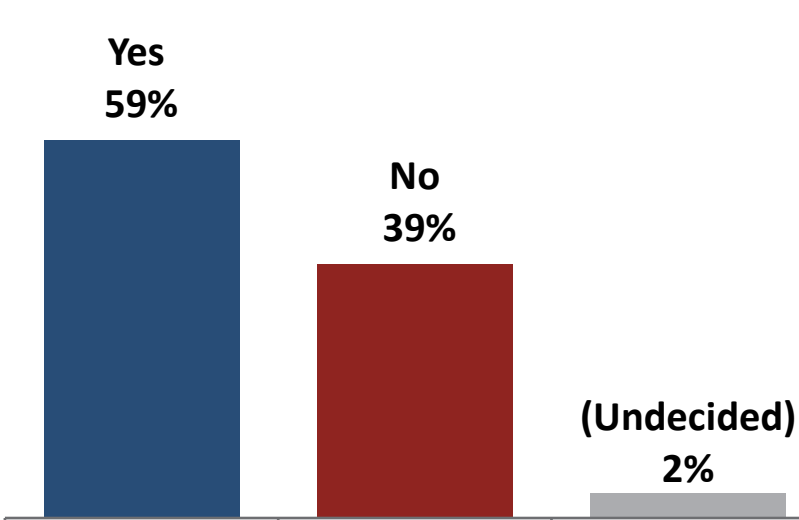| Region	% Yes
Overall (n=2,700)	53%
Alameda County (20%)	58%
Contra Costa County (16%)	47%
Marin/Sonoma County (12%)	50%
Napa/Solano County (8%)	48%
San Francisco County (12%)	57%
San Mateo County (10%)	58%
Santa Clara County (22%)	54%

Margin of error for each subgroup shown ranges up to ± 6.7 percentage points
Measure support aggregated across all three revenue mechanisms tested
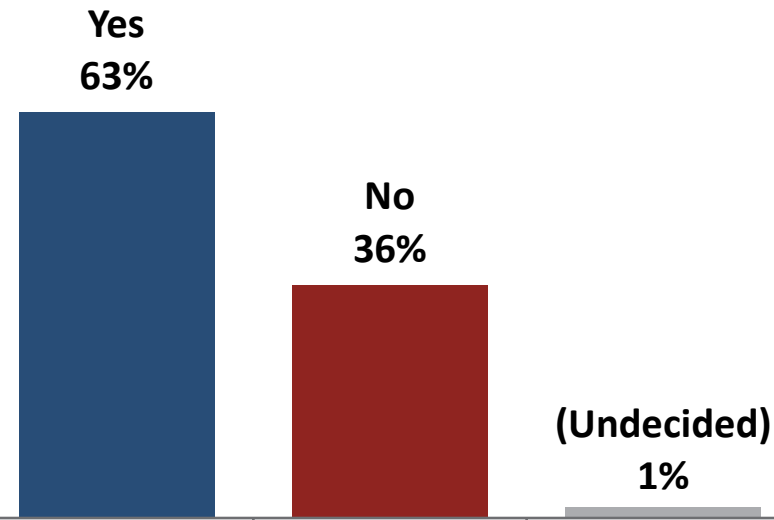
Comparison to March Survey

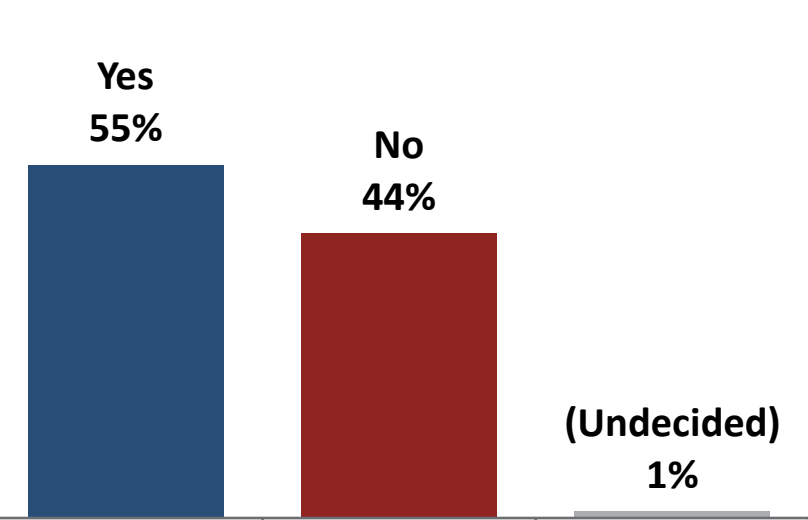| March 2023: Transit Only	March 2023: Transit & Transportation	October 2023:
To address the Bay Area's transportation needs, reduce greenhouse gases and decrease traffic congestion by: providing reliable, affordable and connected BART, train, ferry, and bus service; improving access to public transit for seniors and persons with disabilities; reducing transit wait times; and improving rider safety; shall the measure enacting a half-cent sales tax for 30 years generating at least $816,000,000 annually, subject to oversight and audits, be adopted?	To address the Bay Area's transportation needs, reduce greenhouse gases and decrease traffic congestion by: providing reliable, affordable and connected BART, train, ferry, and bus service; improving pedestrian, bike and transit rider safety; repairing potholes; adding carpool lanes; and protecting transportation networks from sea level rise; shall the measure enacting a half-cent sales tax for 30 years generating at least $816,000,000 annually, subject to oversight and audits, be adopted?	To improve safety and cleanliness on BART and other local public transit; reduce Bay Area traffic; expand and improve bus, BART, light rail, ferry and train service reliability and convenience; reduce greenhouse gas emissions; repair potholes; make transit easier and more affordable to use and make streets safer for walking and biking, shall the measure enacting a half-cent sales tax for 30 years generating approximately $1 billion annually, subject to oversight and audits, be adopted?

March 2023: Transit Only
- Yes 59%
- No 39%
- (Undecided) 2%

March 2023: Transit & Transportation
- Yes 63%
- No 36%
- (Undecided) 1%

October 2023:
- Yes 55%
- No 44%
- (Undecided) 1%

If the election were held today, would you vote yes to approve or no to reject this measure?
Each has sample size = 900n, with a margin of error of ±3.3 percentage points

Potential Measure: Transit Items

Potential transit improvements are popular.

Legend: ■ 7 - Very high priority ■ 6 ■ 5 | **Total Priority**

Item	7 - Very high priority	6	5	Total Priority
Making BART, trains, ferries, light rail, and buses safer, more reliable, affordable, and connected	45%	18%	16%	**80%**
Improving safety and cleanliness on BART and other public transit	45%	17%	17%	**79%**
Avoiding cuts to current public transit service to make sure it's available to those who rely on it, including low-income residents, students, seniors, and persons with disabilities	44%	17%	14%	**76%**
Expanding BART, train, ferry, light rail, and bus service to better connect commuters and communities across the Bay Area	38%	18%	16%	**71%**
Creating a seamless Bay Area transit network, with coordinated fares, routes, schedules, and signage	36%	19%	17%	**73%**

I'm going to read you a list of potential items that could be included in the proposed Bay Area transportation measure. After each one, please rate how much of a priority that item is to you.

Transit Items by Ridership

Mean (1-7 Scale)

Not at all a priority   *Very high priority*

1   2   3   4   5   6   7

Making BART, trains, ferries, light rail, and buses safer, more reliable, affordable, and connected
- 6.2
- 5.8
- 5.4

Improving safety and cleanliness on BART and other public transit
- 5.8
- 5.7
- 5.6

Avoiding cuts to current public transit service to make sure it's available to those who rely on it, including low-income residents, students, seniors, and persons with disabilities
- 6.1
- 5.7
- 5.2

Creating a seamless Bay Area transit network, with coordinated fares, routes, schedules, and signage
- 5.8
- 5.6
- 5.0

Expanding BART, train, ferry, light rail, and bus service to better connect commuters and communities across the Bay Area
- 6.0
- 5.5
- 4.8

Legend:
- ■ Weekly+ Transit Rider (17%)
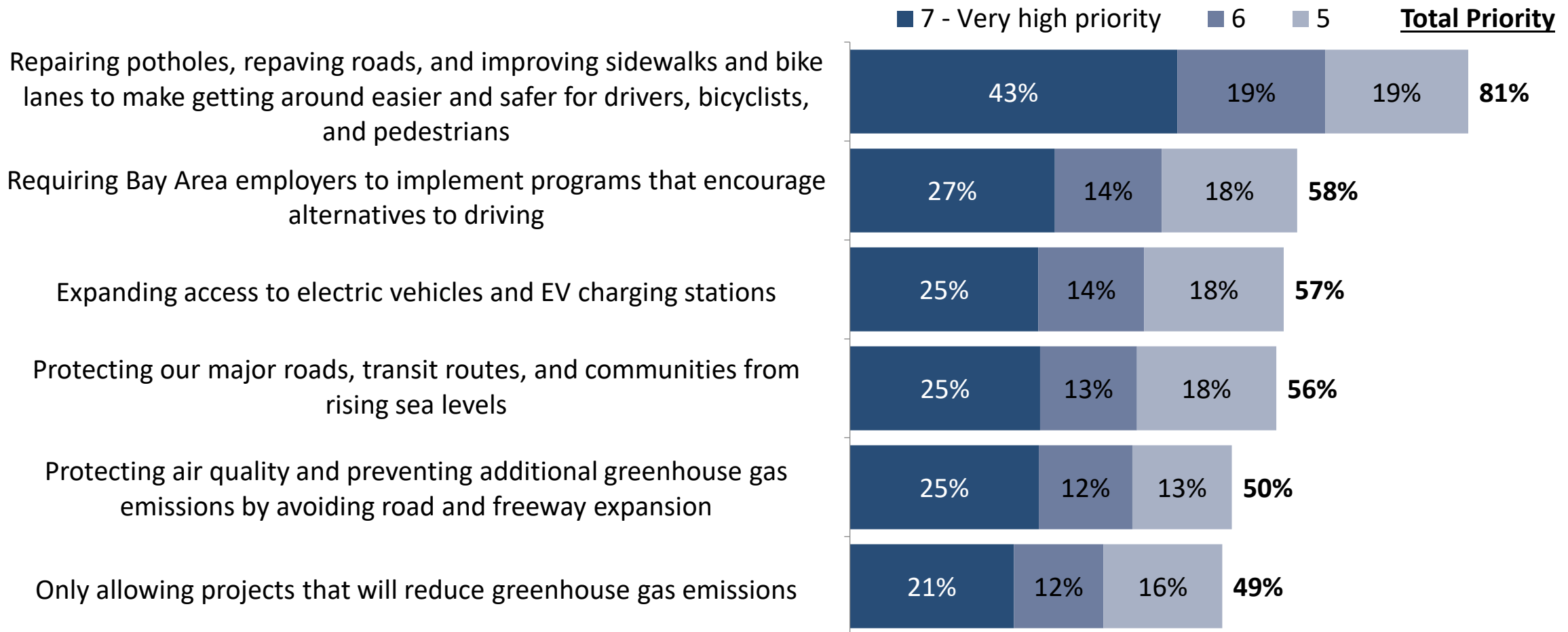- ■ Occasional Rider (34%)
- ■ Rare/Non-rider (49%)

I'm going to read you a list of potential items that could be included in the proposed Bay Area transportation measure. After each one, please rate how much of a priority that item is to you.

Potential Measure: Roads and Climate

Pothole repair and safety improvements are important to most.

Legend: ■ 7 - Very high priority ■ 6 ■ 5 **Total Priority**

Measure	7 - Very high priority	6	5	Total Priority
Repairing potholes, repaving roads, and improving sidewalks and bike lanes to make getting around easier and safer for drivers, bicyclists, and pedestrians	43%	19%	19%	**81%**
Requiring Bay Area employers to implement programs that encourage alternatives to driving	27%	14%	18%	**58%**
Expanding access to electric vehicles and EV charging stations	25%	14%	18%	**57%**
Protecting our major roads, transit routes, and communities from rising sea levels	25%	13%	18%	**56%**
Protecting air quality and preventing additional greenhouse gas emissions by avoiding road and freeway expansion	25%	12%	13%	**50%**
Only allowing projects that will reduce greenhouse gas emissions	21%	12%	16%	**49%**

I'm going to read you a list of potential items that could be included in the proposed Bay Area transportation measure. After each one, please rate how much of a priority that item is to you.

Potential Measure: Reforms

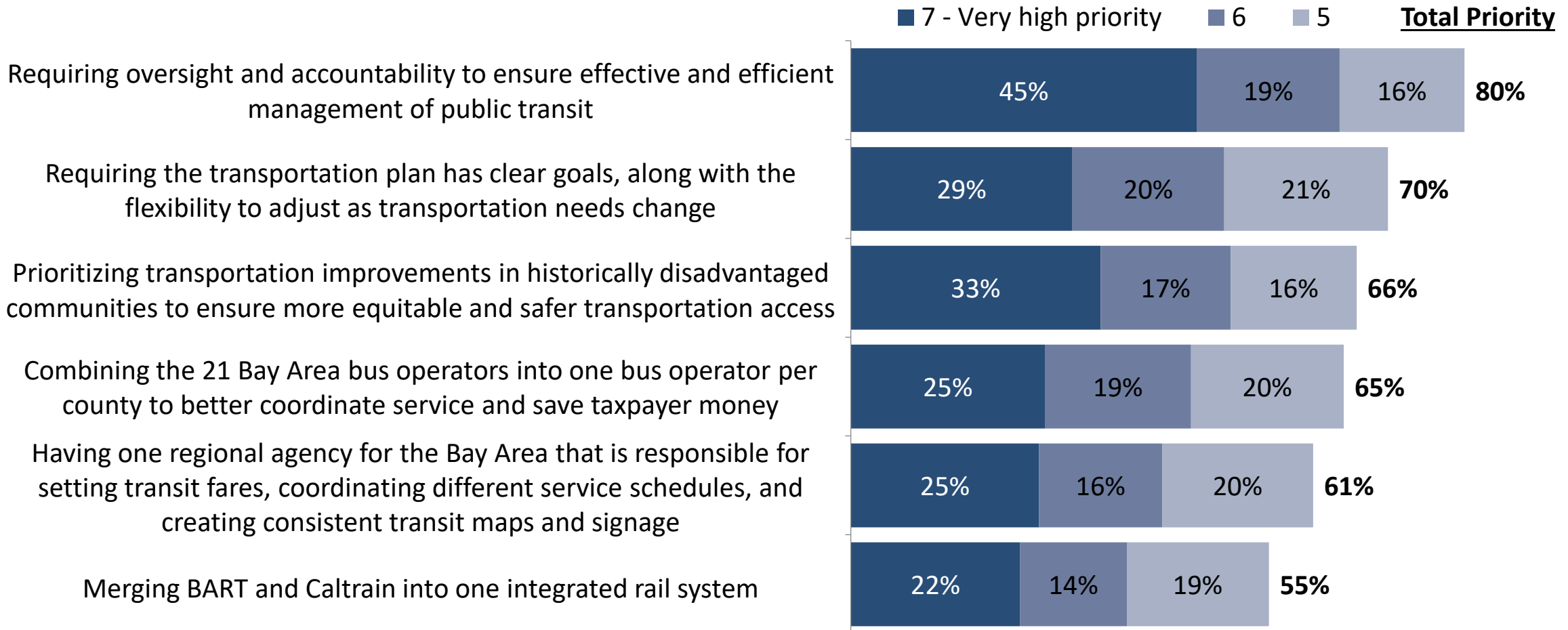*Voters want accountability, and reforms that could bring change have significant support.*

Legend: ■ 7 - Very high priority ■ 6 ■ 5 **Total Priority**

Statement	7 - Very high priority	6	5	Total Priority
Requiring oversight and accountability to ensure effective and efficient management of public transit	45%	19%	16%	**80%**
Requiring the transportation plan has clear goals, along with the flexibility to adjust as transportation needs change	29%	20%	21%	**70%**
Prioritizing transportation improvements in historically disadvantaged communities to ensure more equitable and safer transportation access	33%	17%	16%	**66%**
Combining the 21 Bay Area bus operators into one bus operator per county to better coordinate service and save taxpayer money	25%	19%	20%	**65%**
Having one regional agency for the Bay Area that is responsible for setting transit fares, coordinating different service schedules, and creating consistent transit maps and signage	25%	16%	20%	**61%**
Merging BART and Caltrain into one integrated rail system	22%	14%	19%	**55%**

I'm going to read you a list of potential items that could be included in the proposed Bay Area transportation measure. After each one, please rate how much of a priority that item is to you.

Flexible Goals vs. Detailed Plan

Flexibility is better than detail for the vast majority.

Which of the following statements is closer to your opinion:

A transportation measure for the Bay Area should have clear goals for how money will be spent while also allowing flexibility based on changing circumstances and transportation demand.
70%

A transportation measure for the Bay Area should have a detailed expenditure plan with limited ability to make changes.
25%

(Both/Neither/Don't Know)
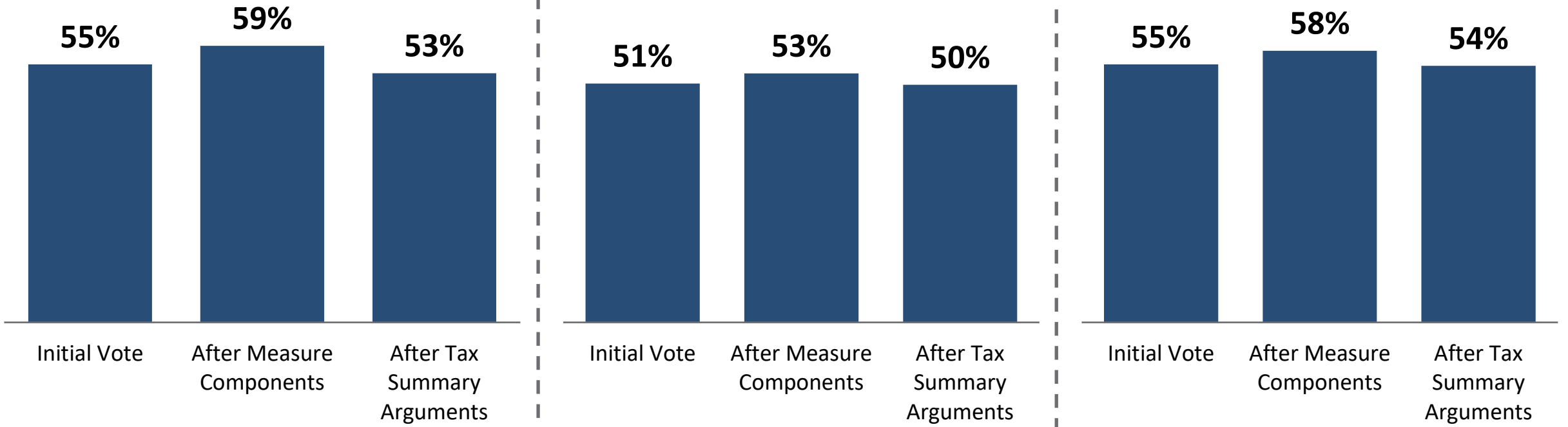**6%**
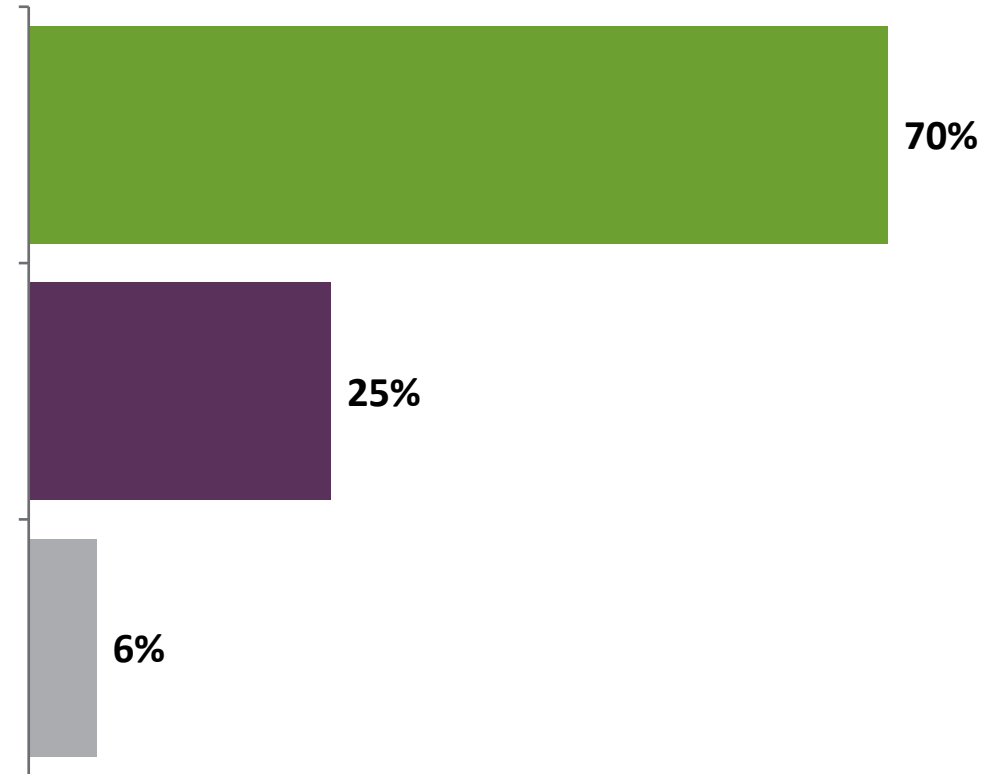
Measure Vote Progression

After voters are presented with potential projects as well as short pros and cons about the revenue mechanism, support moves very little.

Sales Tax

Income Tax

Payroll Tax

% Yes

Sales Tax
- Initial Vote: 55%
- After Measure Components: 59%
- After Tax Summary Arguments: 53%

Income Tax
- Initial Vote: 51%
- After Measure Components: 53%
- After Tax Summary Arguments: 50%

Payroll Tax
- Initial Vote: 55%
- After Measure Components: 58%
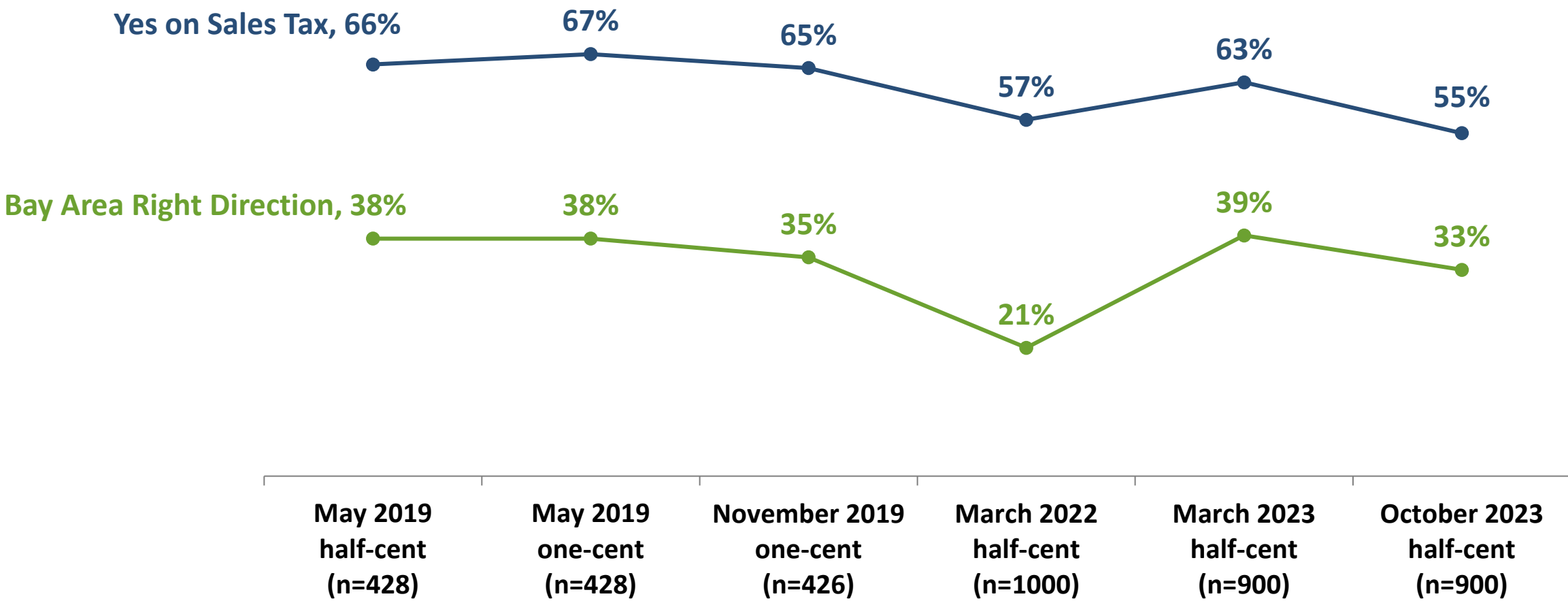- After Tax Summary Arguments: 54%

Given what you've heard, would you vote yes to approve or no to reject the proposed transportation measure?
n=900 for each measure; MoE ±3.3 percentage points

Sales Tax Support and Overall Mood

It appears that overall mood may be an influence on support for a measure.

Yes on Sales Tax, 66%   67%   65%   57%   63%   55%

Bay Area Right Direction, 38%   38%   35%   21%   39%   33%

| May 2019 half-cent (n=428) | May 2019 one-cent (n=428) | November 2019 one-cent (n=426) | March 2022 half-cent (n=1000) | March 2023 half-cent (n=900) | October 2023 half-cent (n=900) |

Conclusions

▸ Bay Area voters believe **public transit is important**, want to see improvements, and favor reforms that could bring change.

▸ Support for the revenue measures tested is **slightly above a majority**.

▸ This poll is reflective of the attitudes of Bay Area voters today, **three years ahead of** a potential Nov 2026 election.

▸ **Attitudes may shift over time** based on a number of factors, including changes in commute habits, office use patterns, and attitudes towards Bay Area transit.

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