








Bay Area Voter Views of a Potential Transit Funding Measure

Key Findings of a Survey Conducted September 19-29, 2024



OPINION
RESEARCH
& STRATEGY

Survey Methodology

Dates	September 19-29, 2024
Survey Type	Dual-mode Voter Survey
Research Population	Likely November 2026 Voters in Alameda, Contra Costa, San Francisco, San Mateo and Santa Clara Counties
Total Interviews	1,784, with at least 350 per county
Margin of Sampling Error	(Full Sample) $\pm 2.8\%$ at the 95% Confidence Level (Half Sample) $\pm 3.9\%$ at the 95% Confidence Level
Contact Methods	 Telephone Calls  Email Invitations  Text Invitations
Data Collection Modes	 Telephone Interviews  Online Interviews
Survey Tracking	2013 onward
Languages	English, Spanish and Chinese

(Note: Not All Results Will Sum to 100% Due to Rounding)

Survey Goals

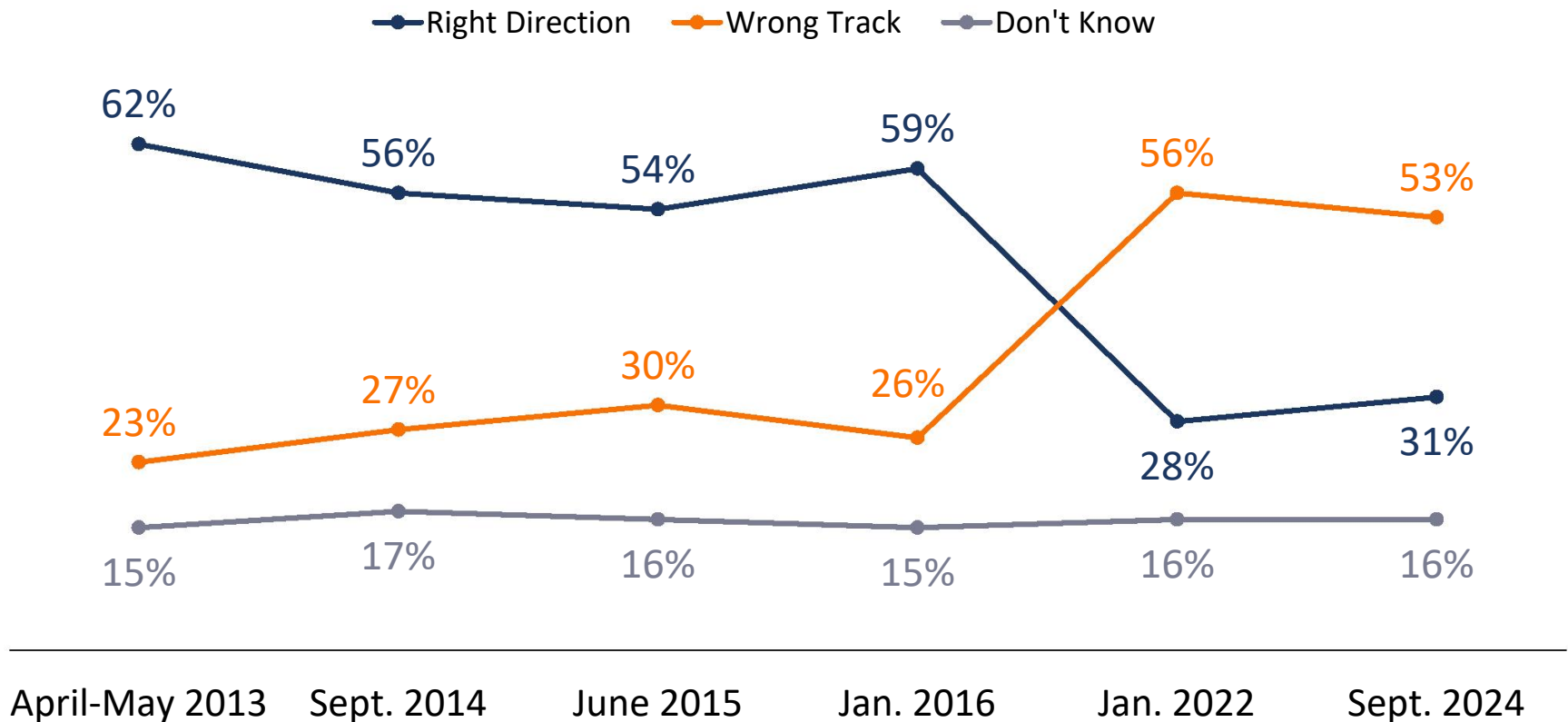
1. Ask questions to determine the overall mood of the 2026 electorate, with a specific emphasis on their views of public transit in the Bay Area.
2. Assess the viability of a potential five-county measure (Alameda, Contra Costa, San Francisco, San Mateo, Santa Clara) generating operating funds for BART and other transit systems.
 - a. Look at both a potential sales tax and a potential parcel tax.
 - b. Look at different framings of a measure, one more focused on preventing closures and service reductions and one more focused on maintaining and improving services.



Electoral Context

A majority says the Bay Area is headed in the wrong direction.

Would you say things in the Bay Area are generally going in the right direction, or do you feel that things are pretty seriously off on the wrong track?

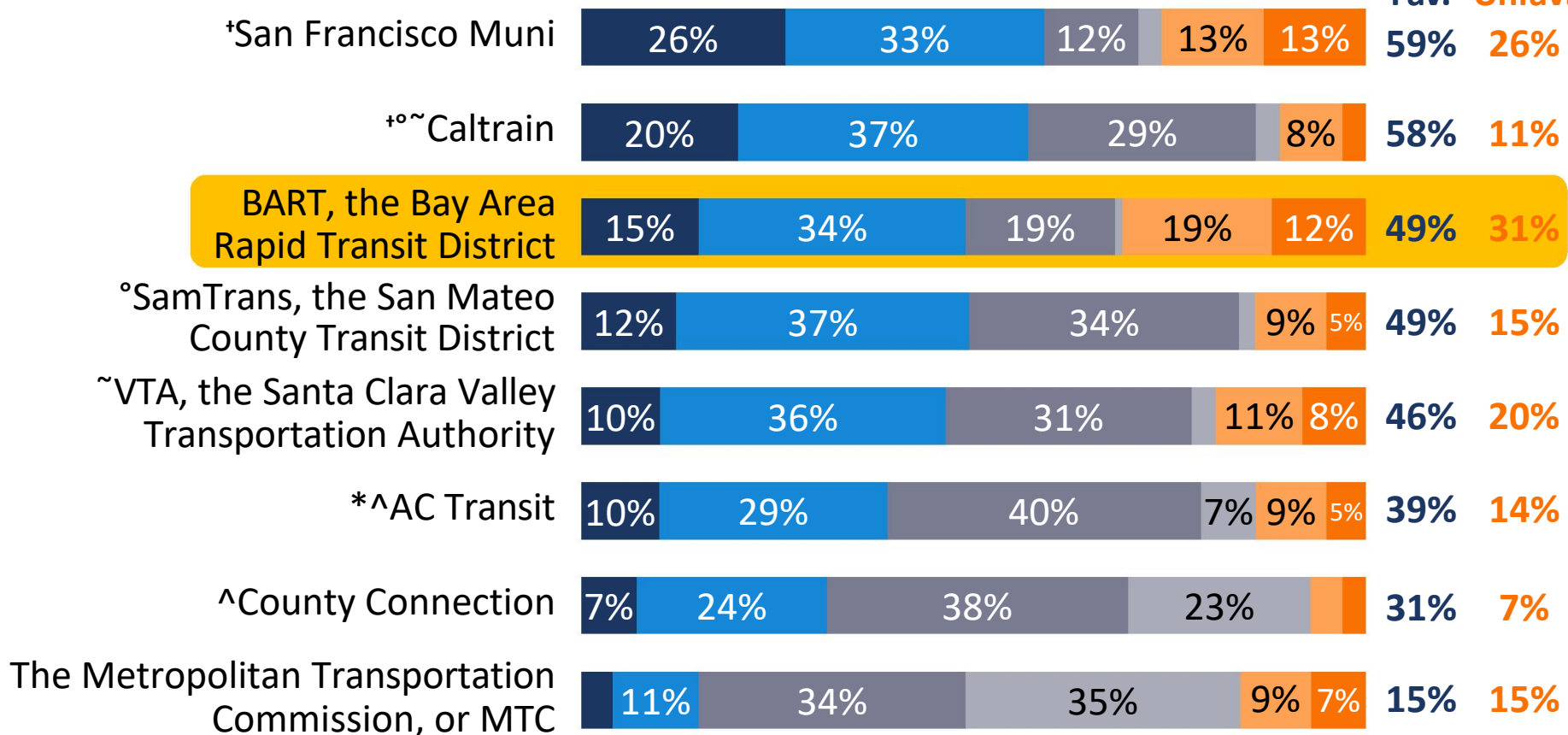


However, voters have net favorable views of major transit agencies in the Bay Area.

Here are some names of public organizations and, please indicate if you have a generally favorable, neutral, or generally unfavorable opinion of that group.

■ Very Fav. ■ Smwt. Fav. ■ Neutral ■ Never Heard of ■ Smwt. Unfav. ■ Very Unfav.

Total Fav. **Total Unfav.**

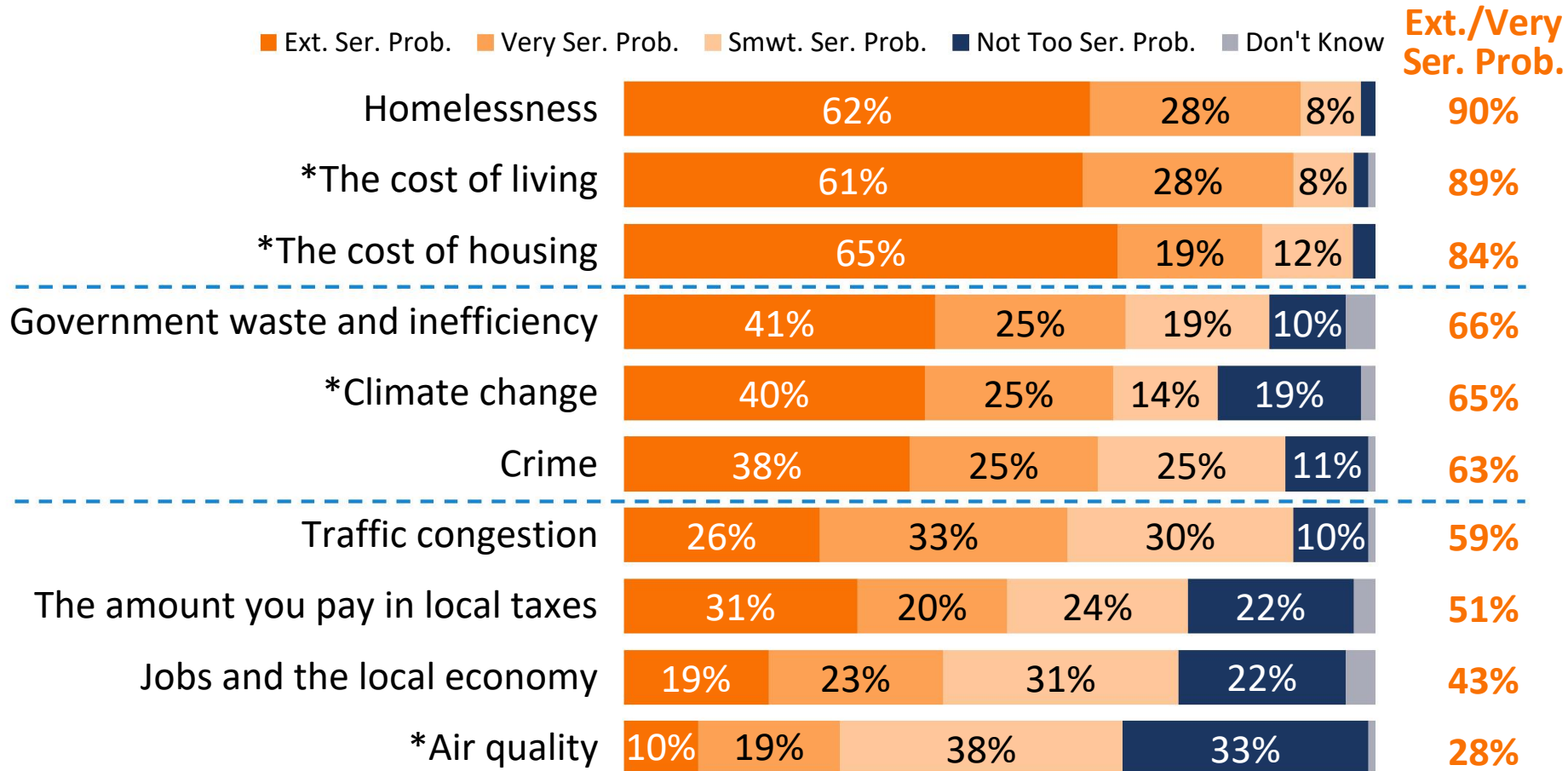


Views of BART are consistent with 2022, but remain less favorable than pre-pandemic.

Public Organization	Total Favorable				
	2013	2014	2022	2024	Difference (2022-2024)
San Francisco Muni (SF County)	58%	52%	48%	59%	+11%
BART, or the Bay Area Rapid Transit system (Alameda, CoCo, SF Counties)	75%	69%	47%	50%	+3%
AC Transit (Alameda & CoCo Counties)	40%	46%	38%	39%	+1%
The Metropolitan Transportation Commission, or MTC	21%	22%	16%	15%	-1%

Homelessness and cost of housing are extremely serious problems for voters.

Please consider the following issues that some people suggest are problems facing the Bay Area. Please indicate whether you think it is an extremely serious problem, a very serious problem, a somewhat serious problem, or not too serious a problem for residents of the Bay Area.



Intensity of concern about crime has declined in the last two years.

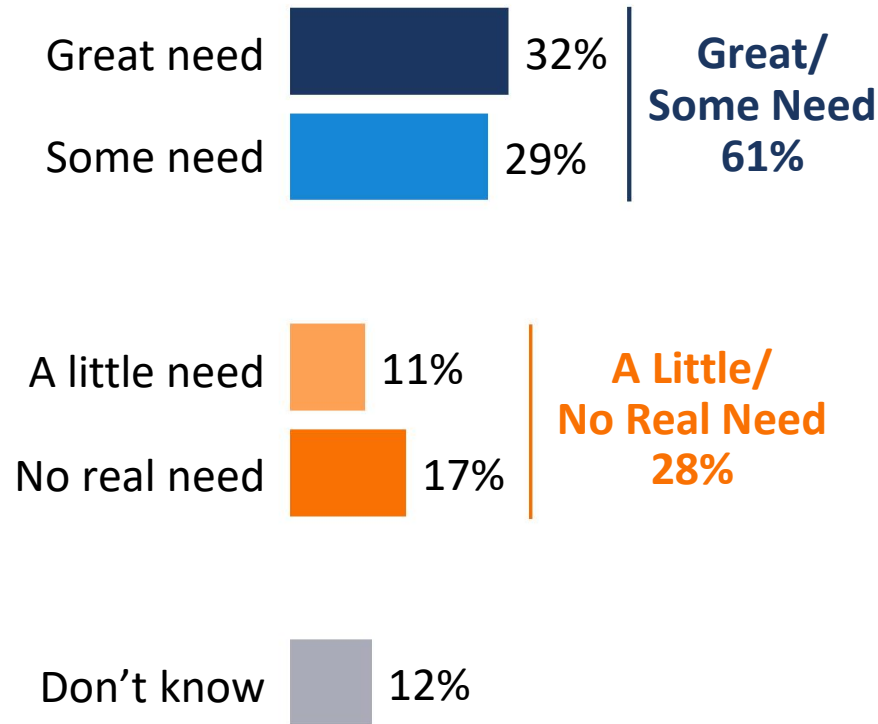
(Alameda, Contra Costa and San Francisco Counties).

Issue	Extremely/Very Serious Problem		
	2022	2024	Difference (2022-2024)
*^The cost of living	85%	88%	+3%
Homelessness	92%	91%	-1%
Government waste and inefficiency	67%	66%	-1%
*The cost of housing	86%	84%	-2%
The amount you pay in local taxes	52%	50%	-2%
*Climate change	69%	66%	-3%
^Traffic congestion	60%	55%	-5%
Crime	75%	68%	-7%

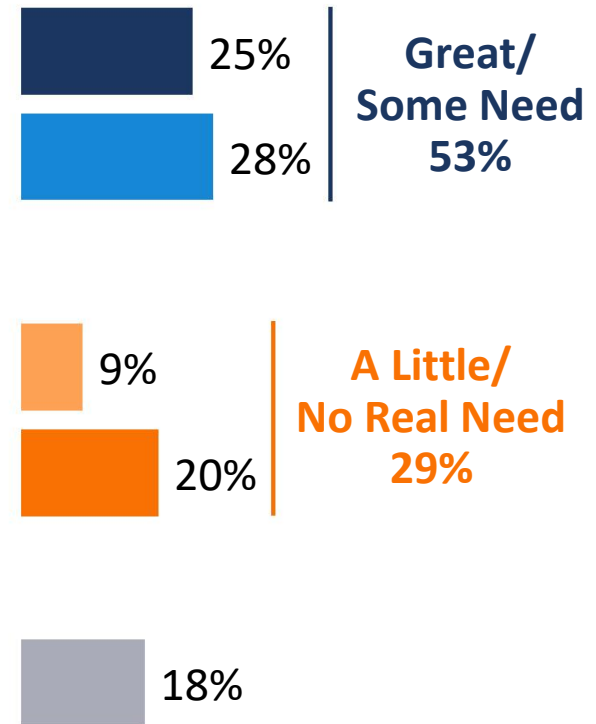
Q6 a, b, d-h & j. Please consider the following issues that some people suggest are problems facing the Bay Area. Please indicate whether you think it is an extremely serious problem, a very serious problem, a somewhat serious problem, or not too serious a problem for residents of the Bay Area. *Split Sample; ^Slight Difference in Wording in Previous Survey

Voters generally see a need for public transit funding – less broadly so for BART specifically.

Would you say that Bay Area public transit, in general, has a great need for additional funding, some need, a little need, or no real need for additional funding?



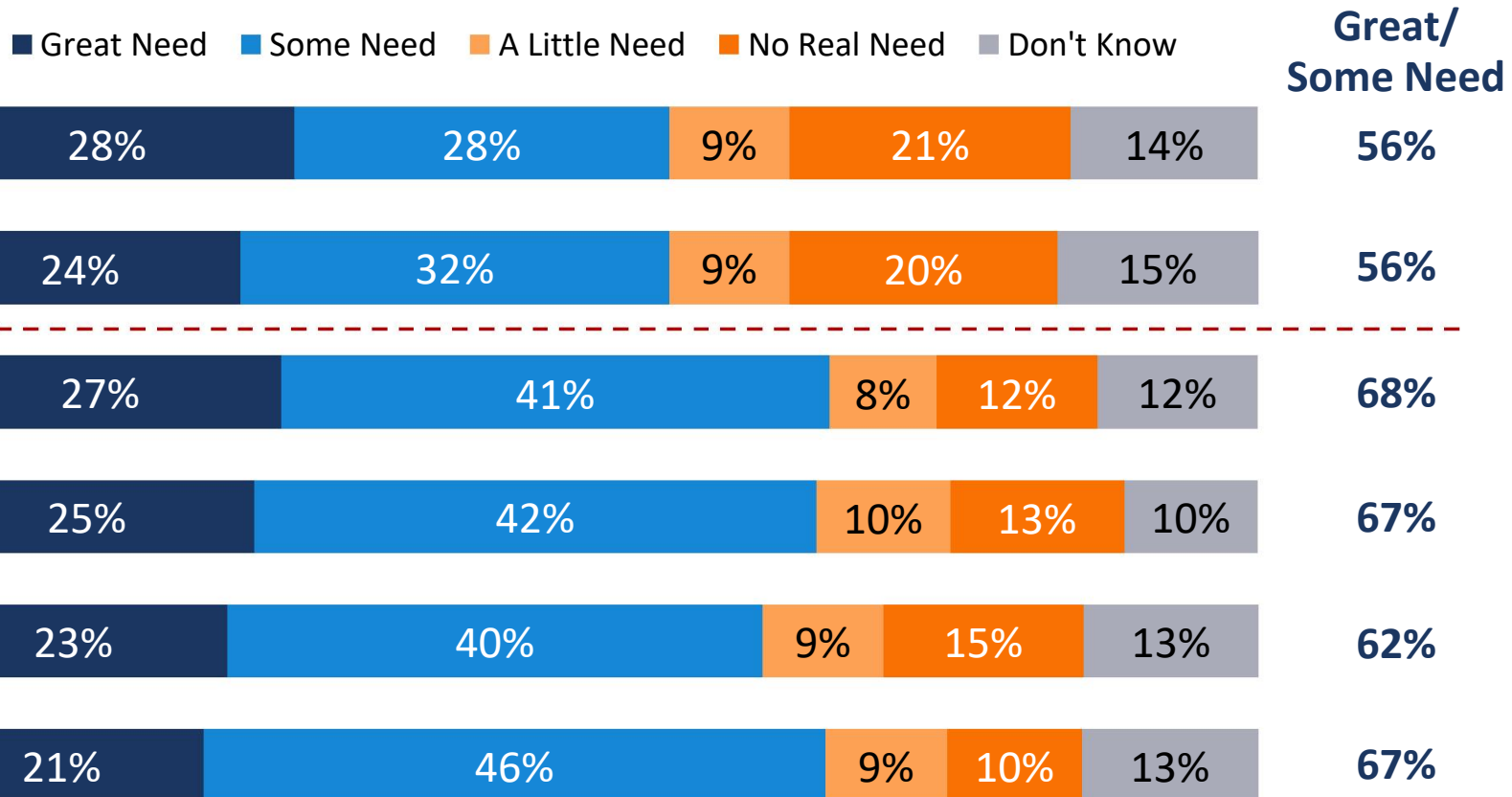
Would you say that BART, specifically, has a great need for additional funding, some need, a little need, or no real need for additional funding?



A majority sees “great” or “some need” for additional BART funding, though still lower than pre-pandemic.

Would you say that BART, specifically, has a great need for additional funding, some need, a little need, or no real need for additional funding?

(Alameda, Contra Costa and San Francisco Counties).

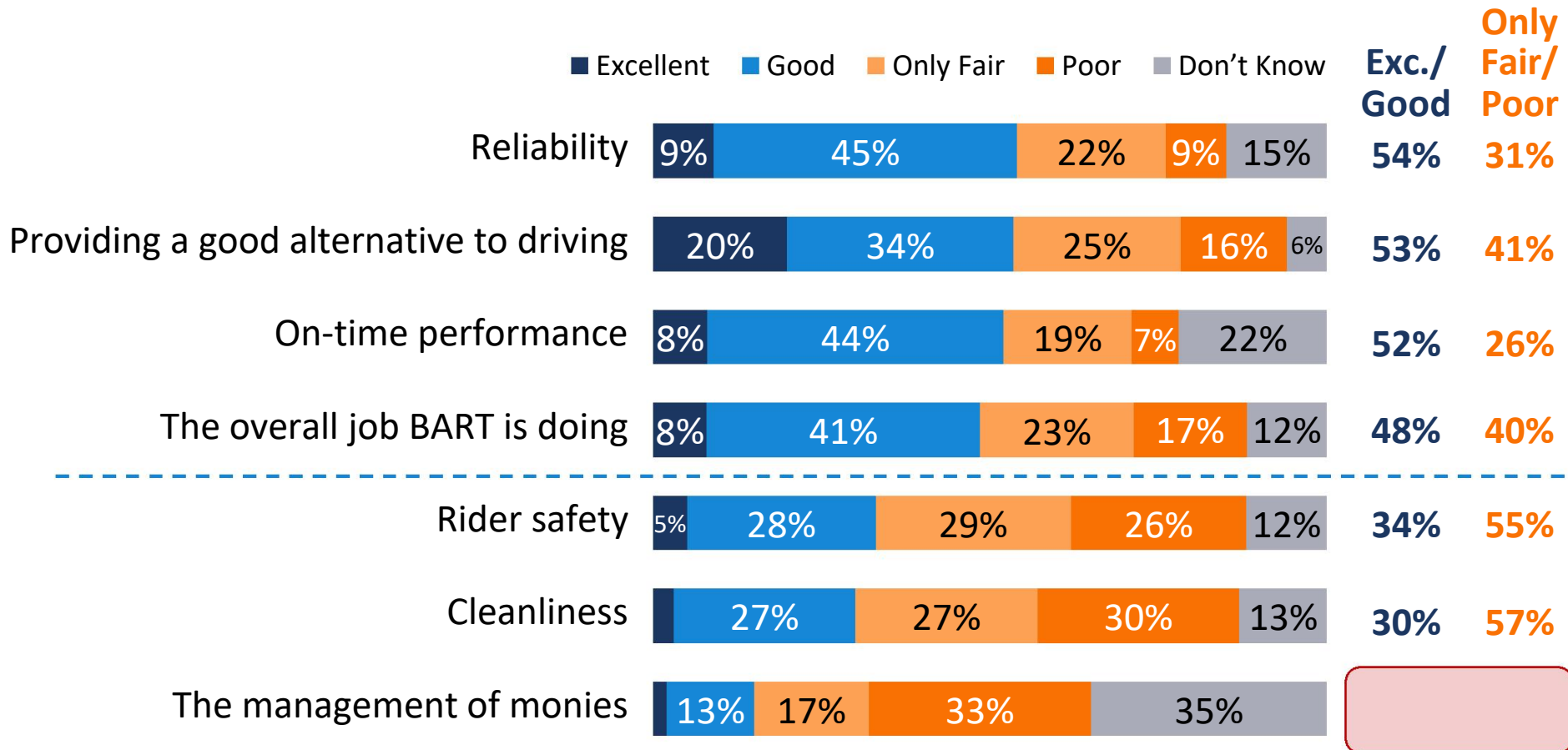




Views of BART

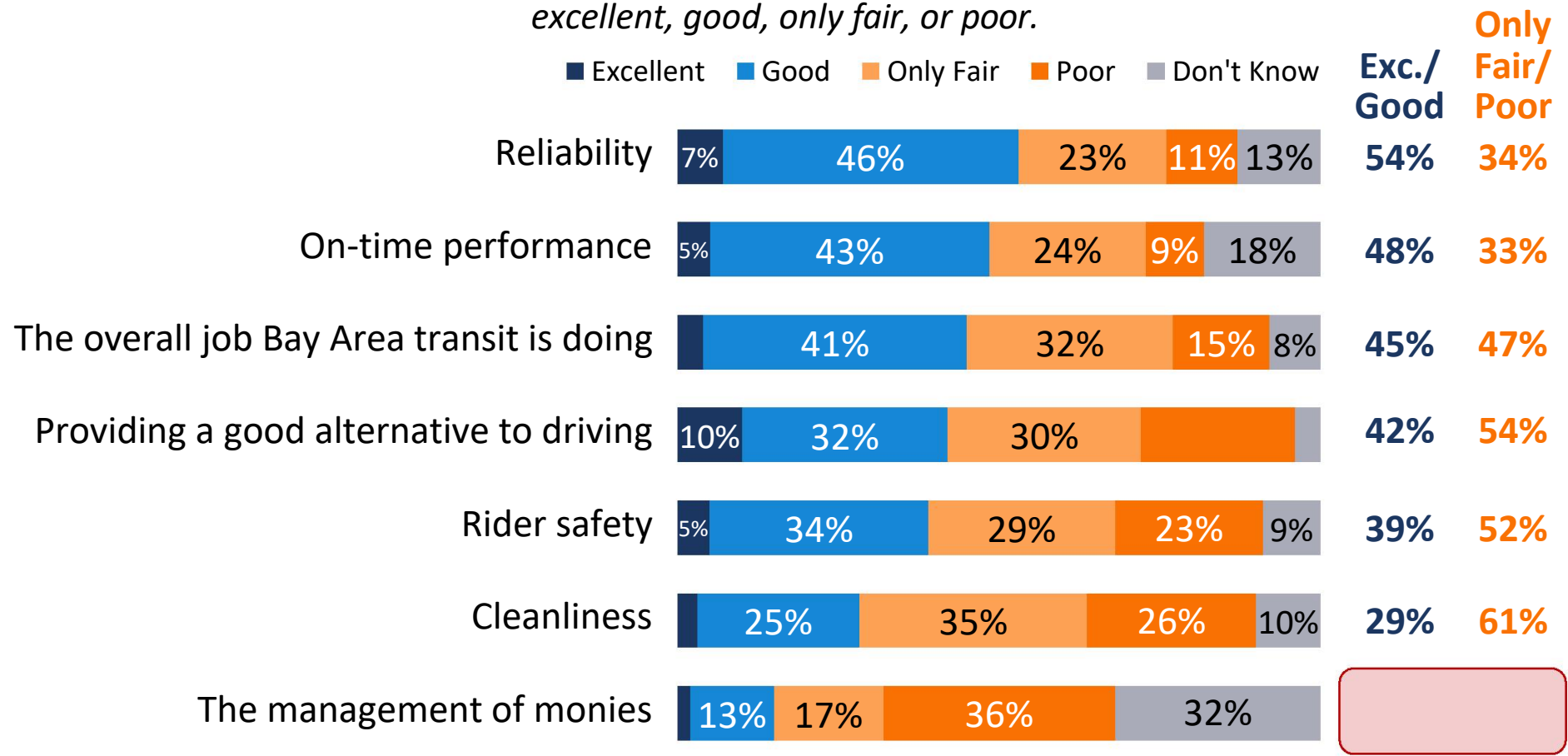
Slim majorities believe BART is reliable, a good alternative to driving, and runs on time.

Regardless of whether you ride BART personally, please rate BART in each of the following areas using a scale of excellent, good, only fair, or poor.



Bay Area transit overall gets slightly lower ratings than BART on on-time performance and providing a driving alternative.

Regardless of whether you ride trains and buses in the Bay Area personally, please rate Bay Area transit in each of the following areas using a scale of excellent, good, only fair, or poor.



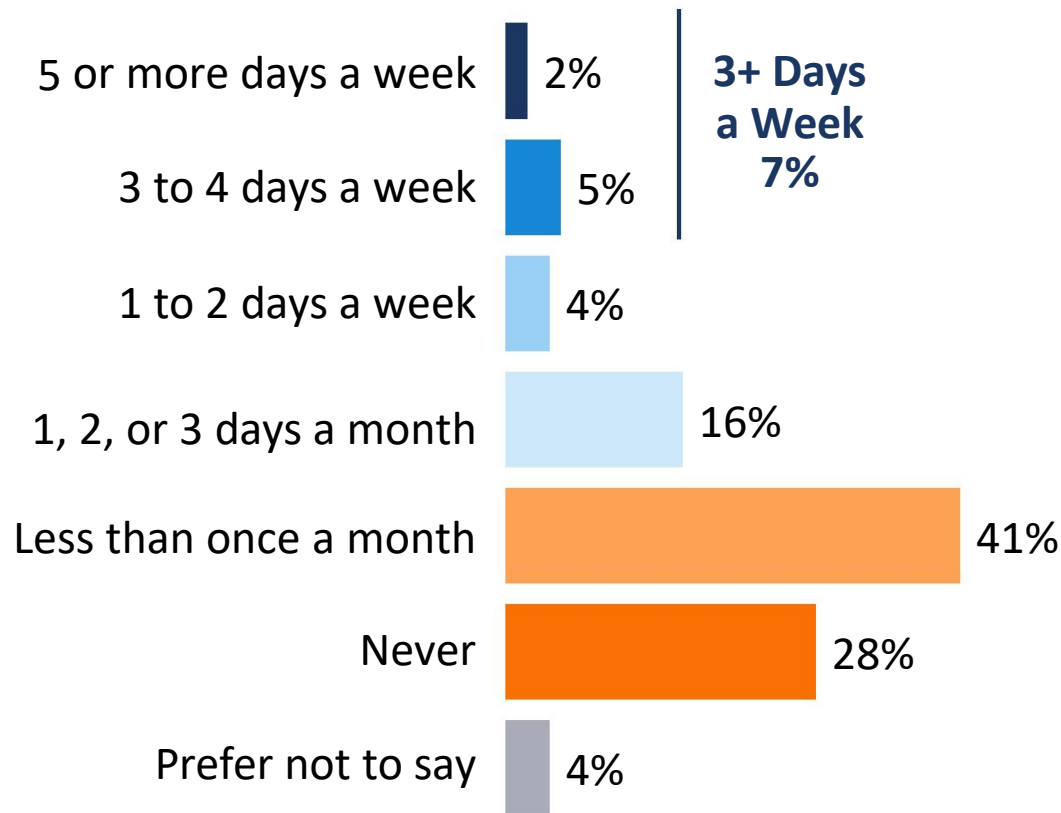
Ratings of BART as an alternative to driving have decreased since the pre-COVID years.

(Alameda, Contra Costa and San Francisco Counties).

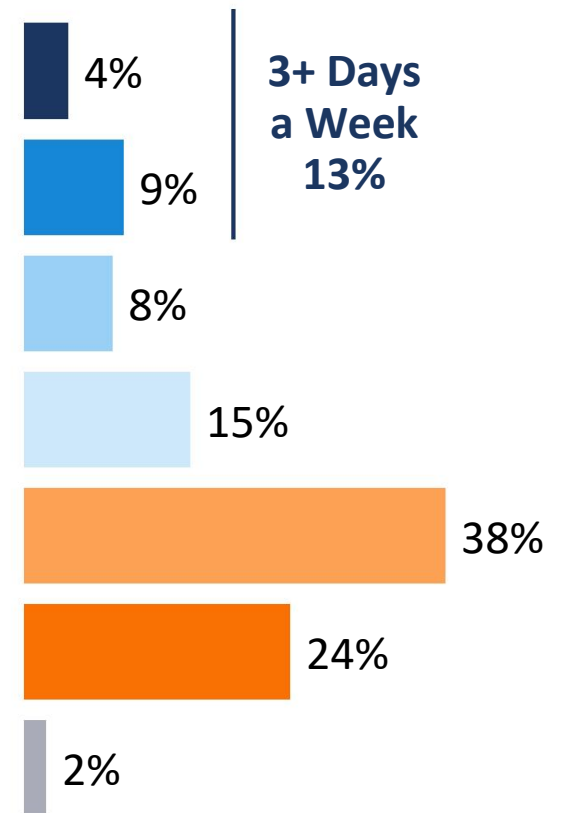
Area	Excellent/Good					
	2013	2014	2015	2022	2024	Difference (2022-2024)
The overall job BART is doing	74%	64%	64%	48%	52%	+4%
The management of monies	20%	22%	17%	16%	16%	-
Providing a good alternative to driving	77%	77%	75%	60%	51%	-9%

Most voters are not transit riders.

How often do you currently ride BART?



How often do you currently ride trains and buses in the Bay Area?



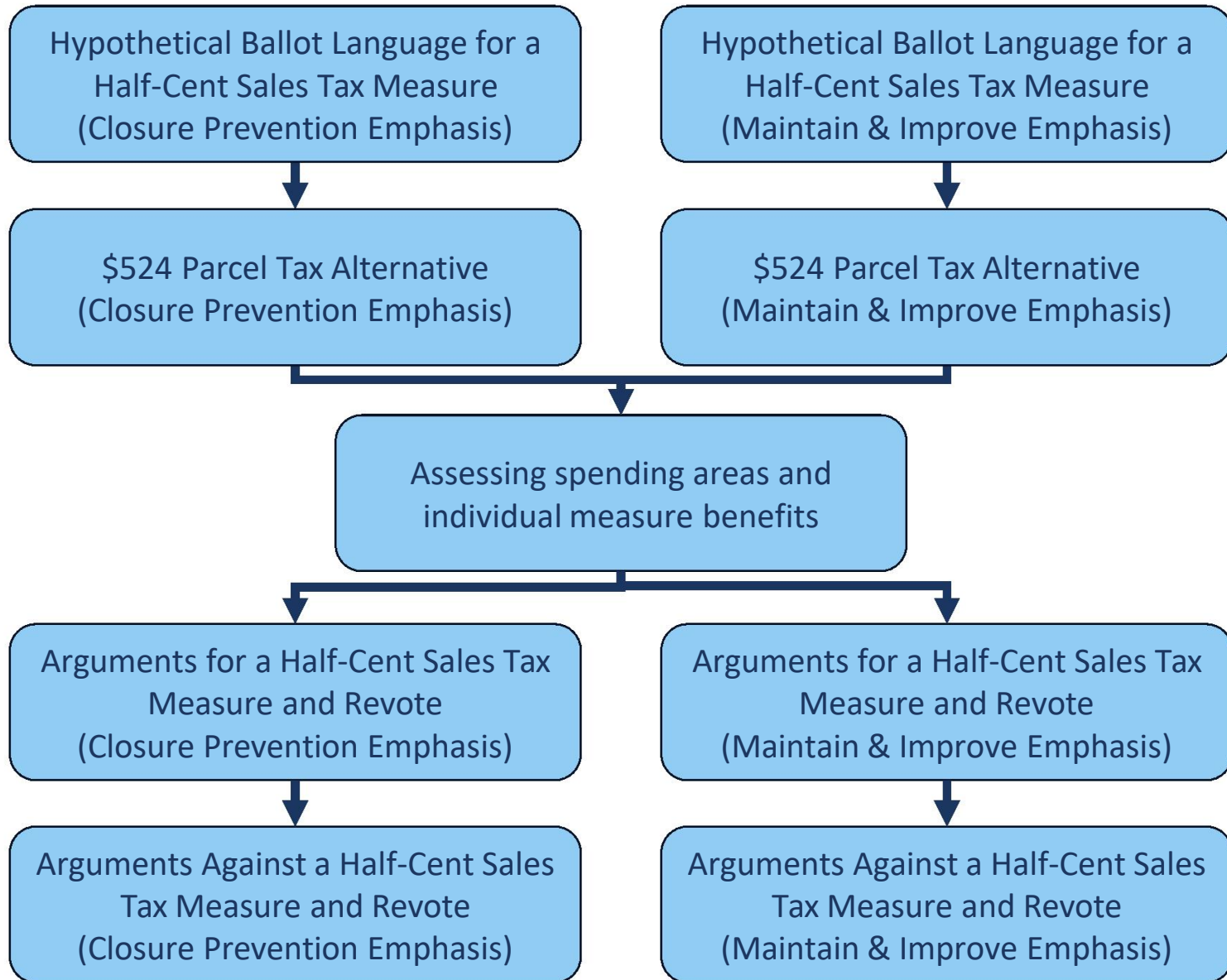


Views of a Transit Revenue Measure

January 2022 Survey

- In just the three BART counties, we conducted a survey looking at both a potential sales tax measure and a potential parcel tax measure as two alternative approaches to generating operating income for BART.
- Neither came close to the two-thirds vote threshold.
- Support for a sales tax (at either the $\frac{1}{2}$ or $\frac{1}{4}$ cent levels) was consistently higher than for a parcel tax (at \$98 or \$198 per parcel).
- Consequently, this 2024 survey led with a potential $\frac{1}{2}$ cent sales tax measure (since there was little difference between $\frac{1}{2}$ and $\frac{1}{4}$ cents in the 2022 survey), though still explored a parcel tax measure alternative at a rate generating a similar amount of revenue (\$524 per parcel).

Testing Approach



Two versions of sales tax ballot language were tested.

Closure Prevention

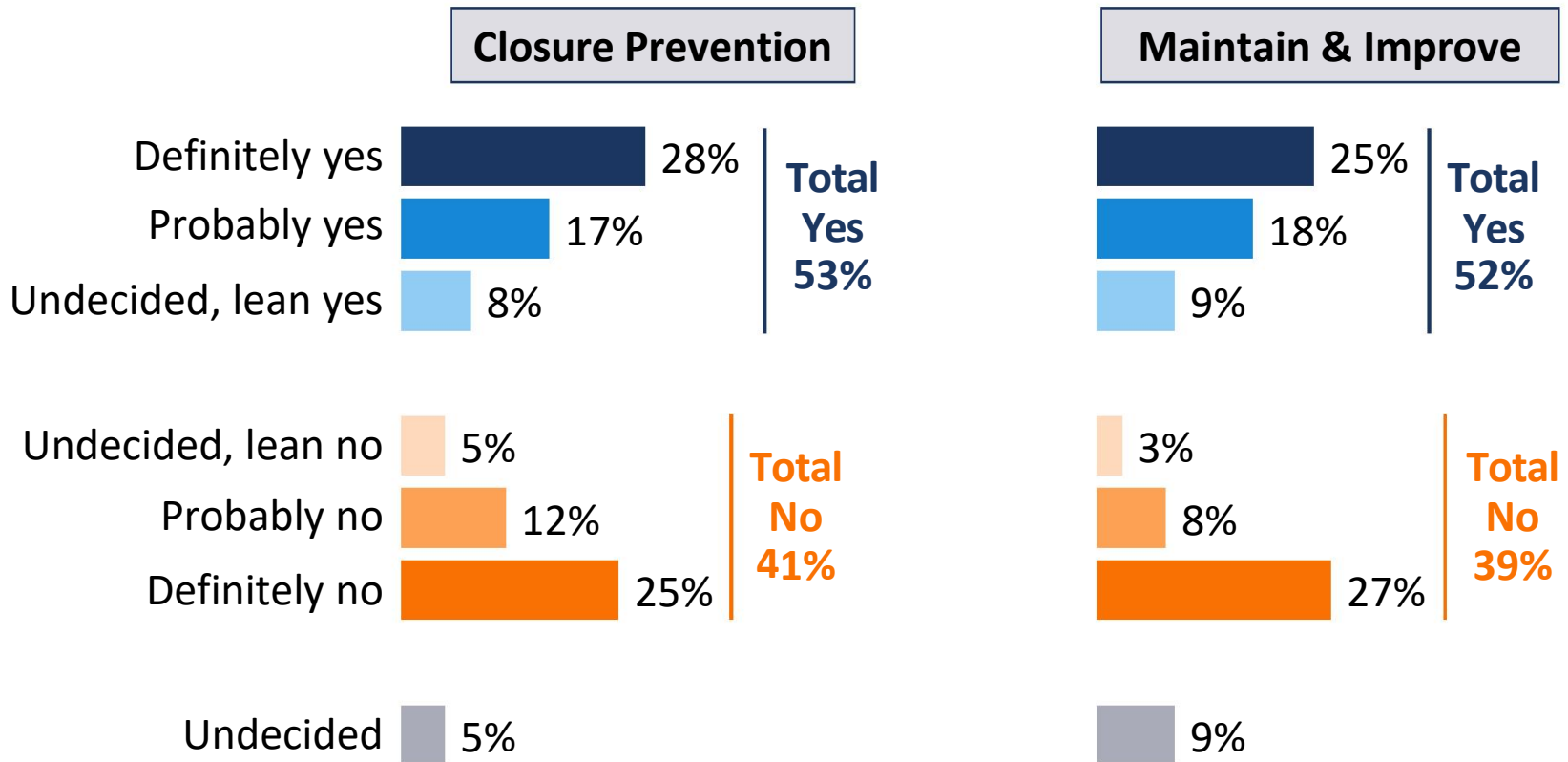
Save Bay Area Transit Plan. To keep BART and other Alameda, Contra Costa, San Francisco, San Mateo, and Santa Clara County transit systems from closing stations and stops, eliminating entire lines, and cancelling night/ weekend service; prevent increasing Bay Area traffic congestion; and continue making investments in safety, cleanliness, reliability, and regional coordination, shall the measure establishing a half-cent sales tax generating approximately \$920,000,000 annually until ended by voters — with independent audits, and public oversight and disclosure — be adopted?

Maintain & Improve

Bay Area Traffic Relief/Safety/Security/Reliability Measure. To keep BART and other Alameda, Contra Costa, San Francisco, San Mateo, and Santa Clara County transit systems' trains, buses, stations, and stops clean and safe; relieve traffic congestion; improve system reliability and regional coordination; and continue providing critical transit options for seniors, students, low-income and disabled persons, shall the measure establishing a half-cent sales tax generating approximately \$920,000,000 annually until ended by voters — with independent audits, and public oversight and disclosure — be adopted?

Both versions of a sales tax measure had similar support from slim majorities.

66.7% Vote Threshold



Voters also heard one of two versions of a parcel tax concept.

Closure Prevention

What if the **Save Bay Area Transit Plan** did not establish a half-cent sales tax, but instead established a \$524 annual parcel tax until ended by voters, generating the same level of funding to keep BART and other Alameda, Contra Costa, San Francisco, San Mateo, and Santa Clara County transit systems from closing stations and stops, eliminating entire lines, and cancelling night and weekend service; prevent increasing Bay Area traffic congestion; and continue making investments in safety, cleanliness, reliability, and regional coordination.

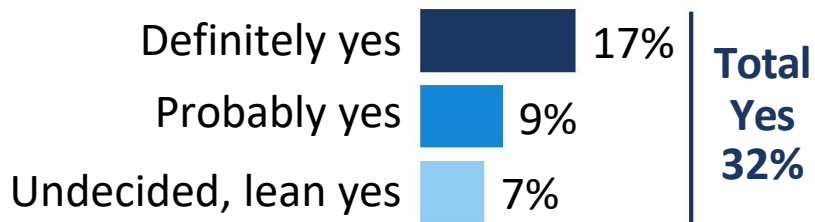
Maintain & Improve

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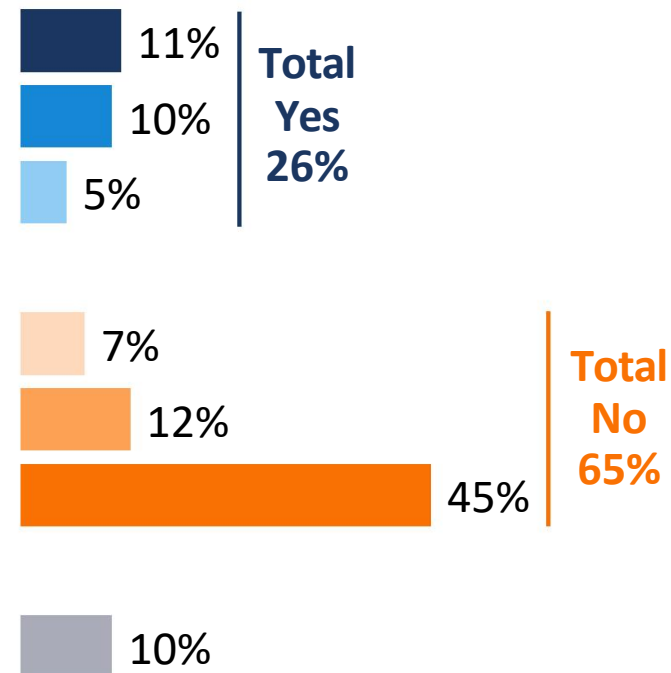
Support was well below 50% for both versions of a parcel tax measure.

66.7% Vote Threshold

Closure Prevention

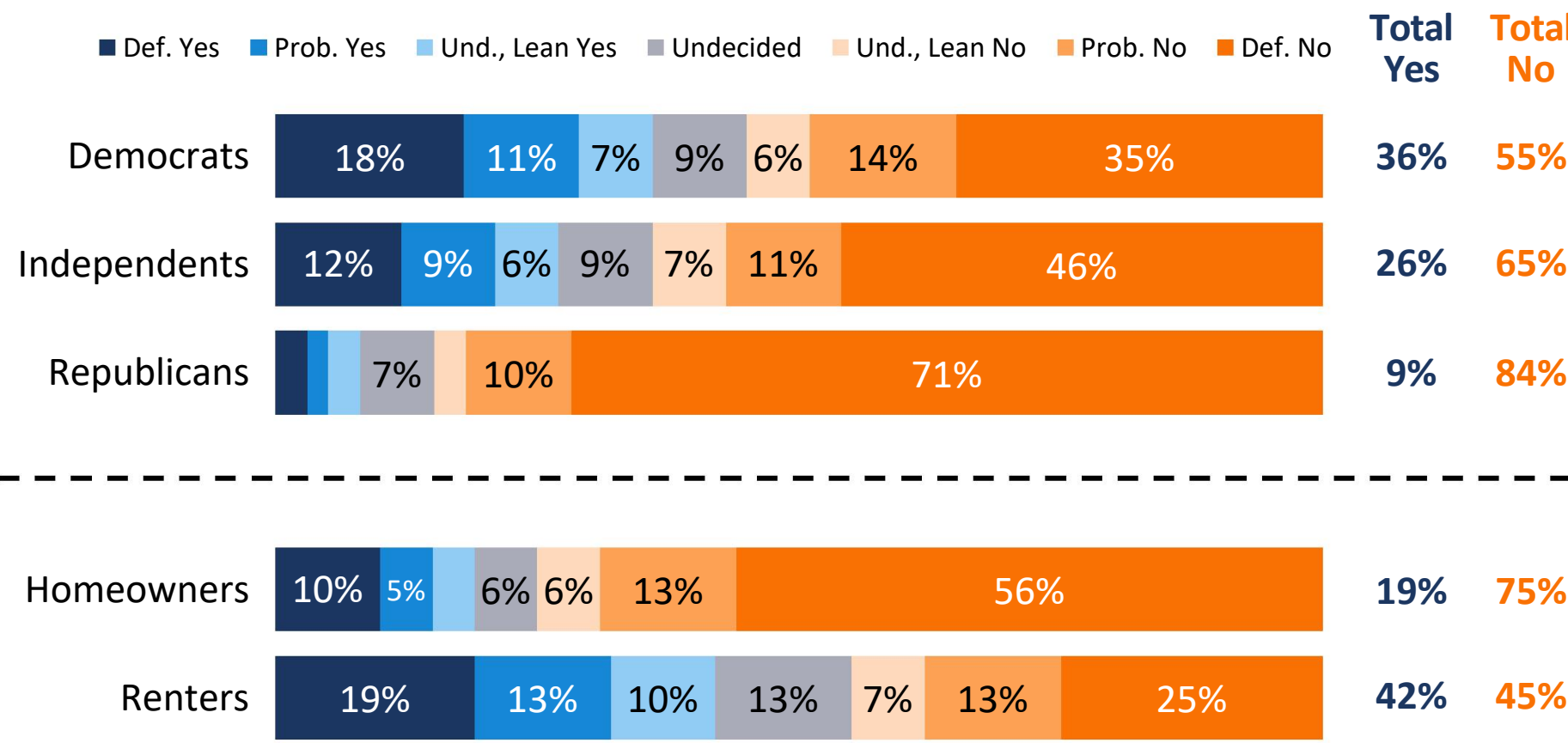


Maintain & Improve



Parcel tax opposition cuts across party lines, and fully three-quarters of homeowners oppose it.

Initial Parcel Tax Vote by Party & Residence



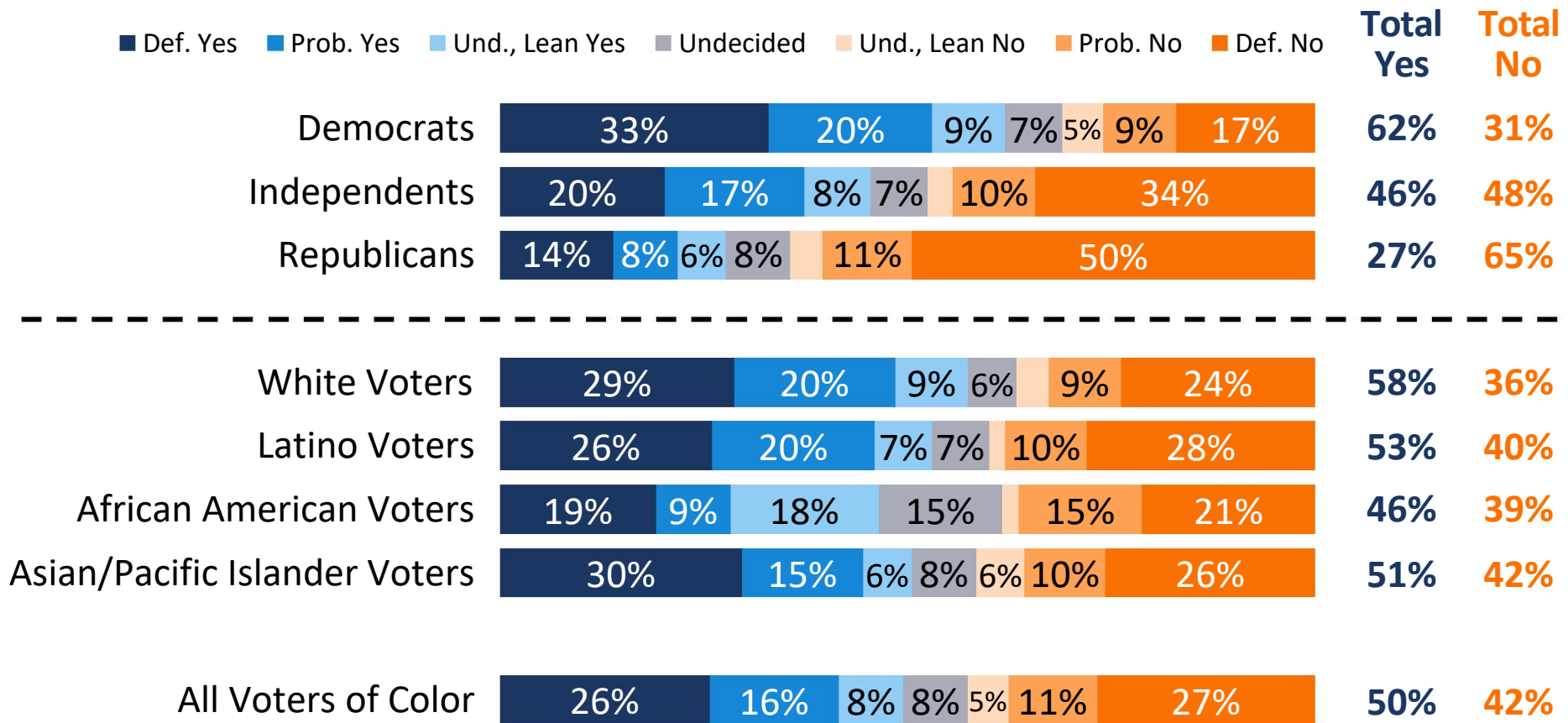
Given the high level of overall opposition to a parcel tax—and among groups needed for one to pass at the two-thirds level (e.g., Democrats and renters)—a parcel tax is not viable.

Consequently, the following slides focus on the sales tax option.

Additionally, unless noted, the results are combined for both sales tax framings to maximize the sample size.

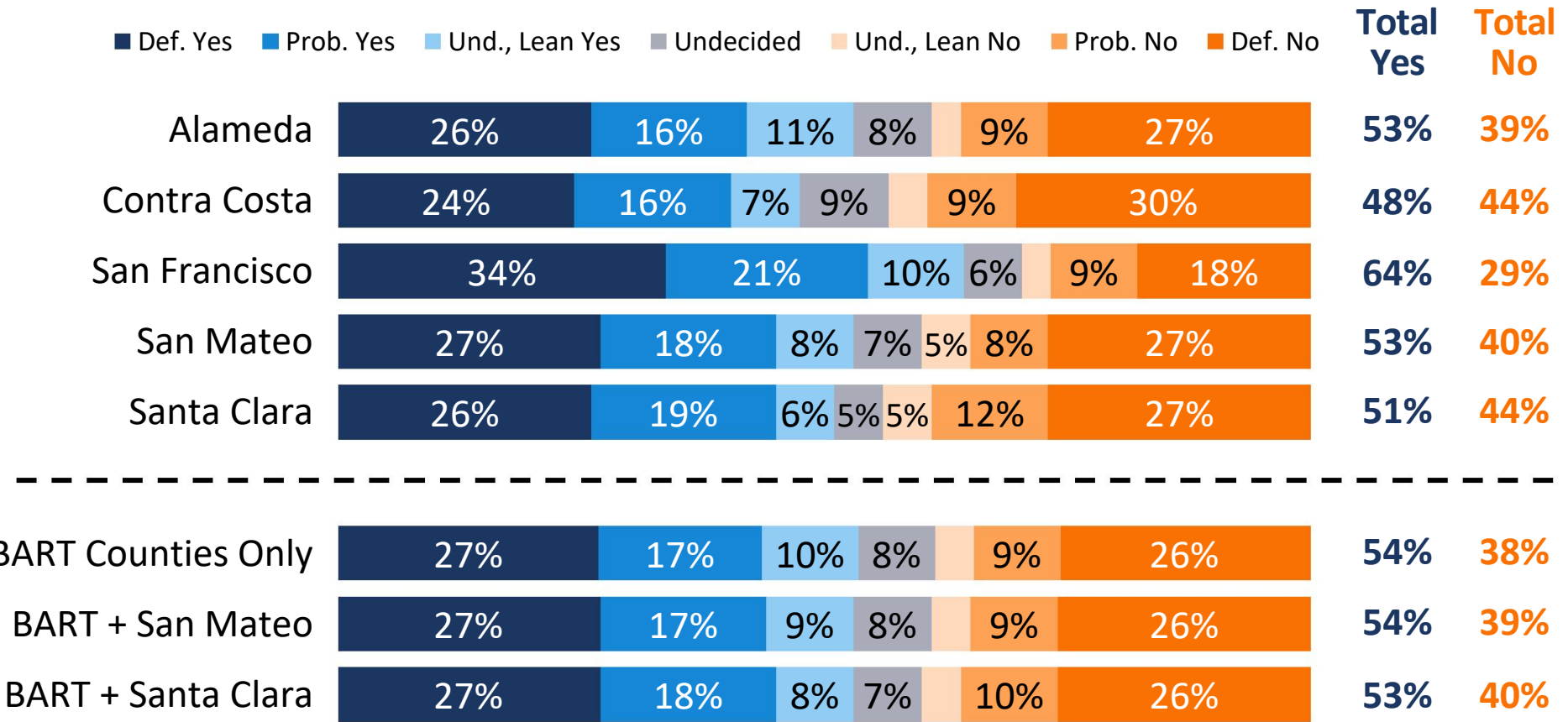
Support is especially broad among Democrats, though it still falls short of two-thirds.

Initial Sales Tax Vote by Party & Race/Ethnicity



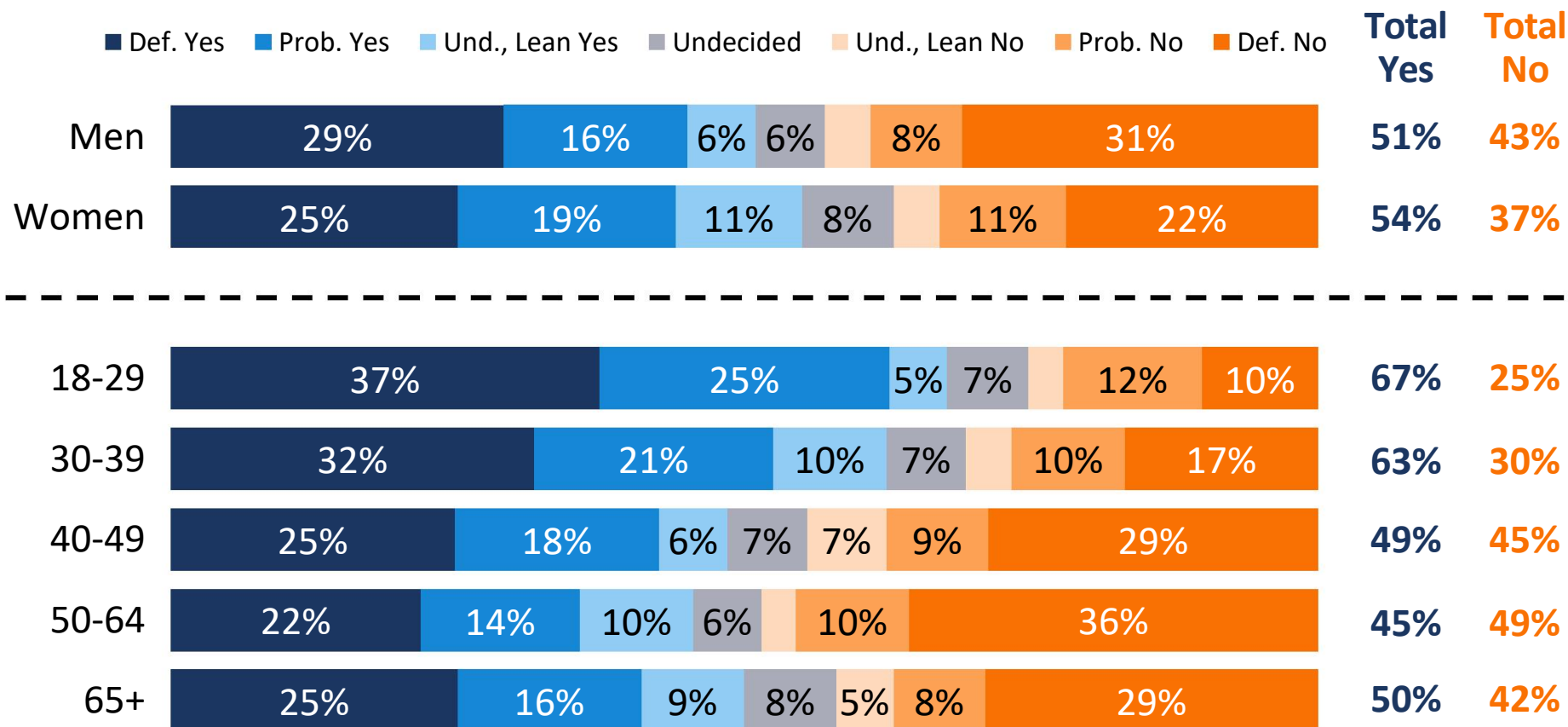
Support is broadest in San Francisco; slim majorities in Alameda, San Mateo and Santa Clara also back it.

Initial Sales Tax Vote by County



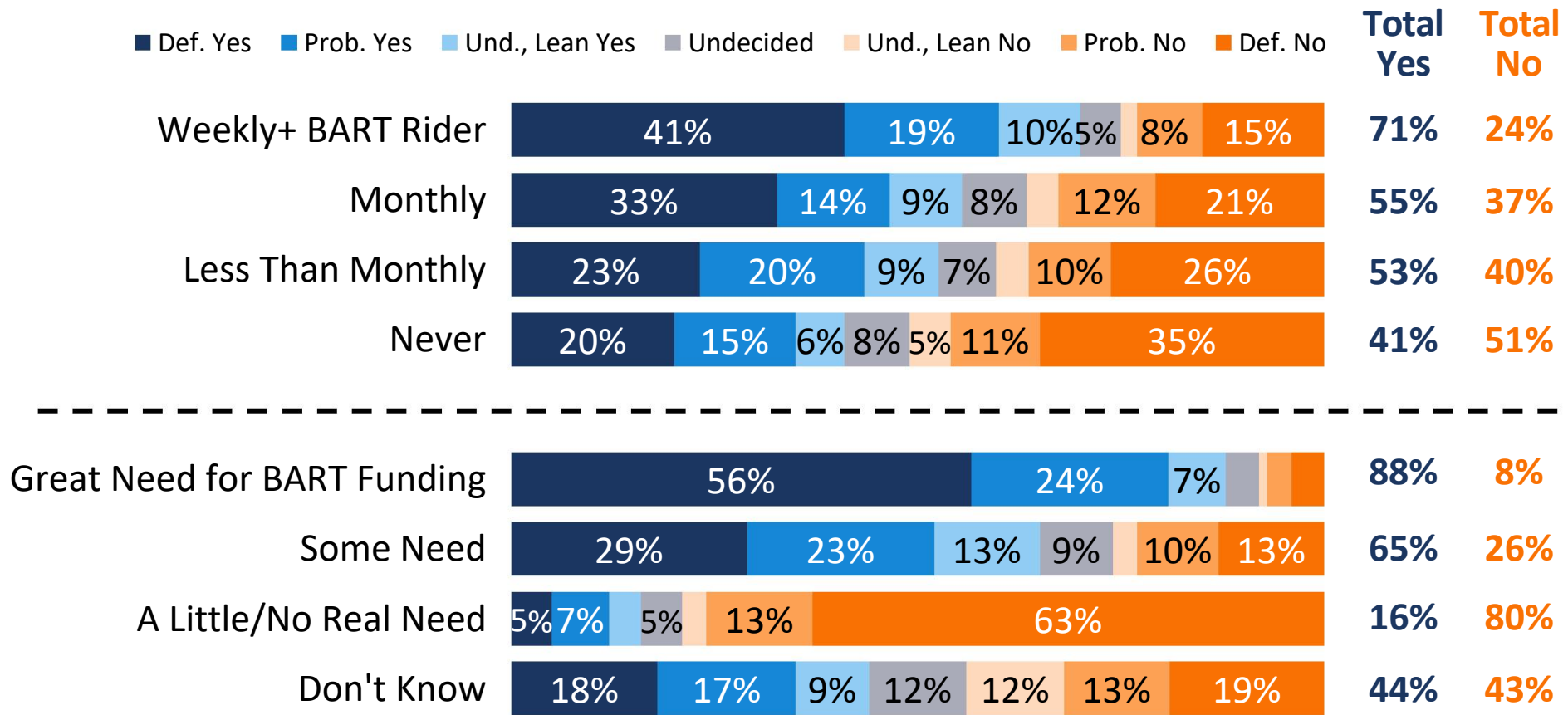
Voters under 40 are more likely to back the measure than voters ages 40 and older.

Initial Sales Tax Vote by Gender & Age



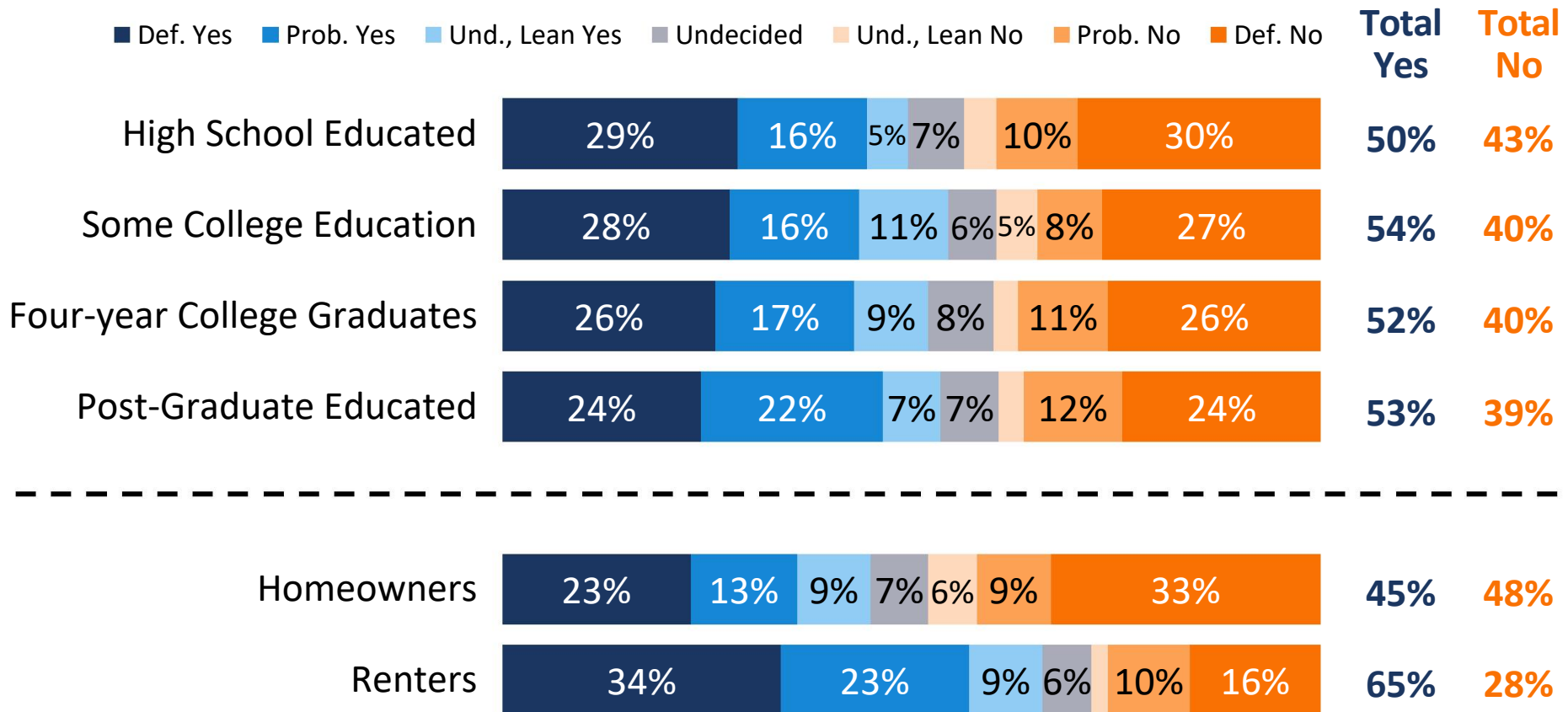
More-frequent riders are especially supportive – as are those who see “great need” in principle.

Initial Sales Tax Vote by Rider Frequency & BART Funding Need



Renters are much more likely to support the measure than homeowners.

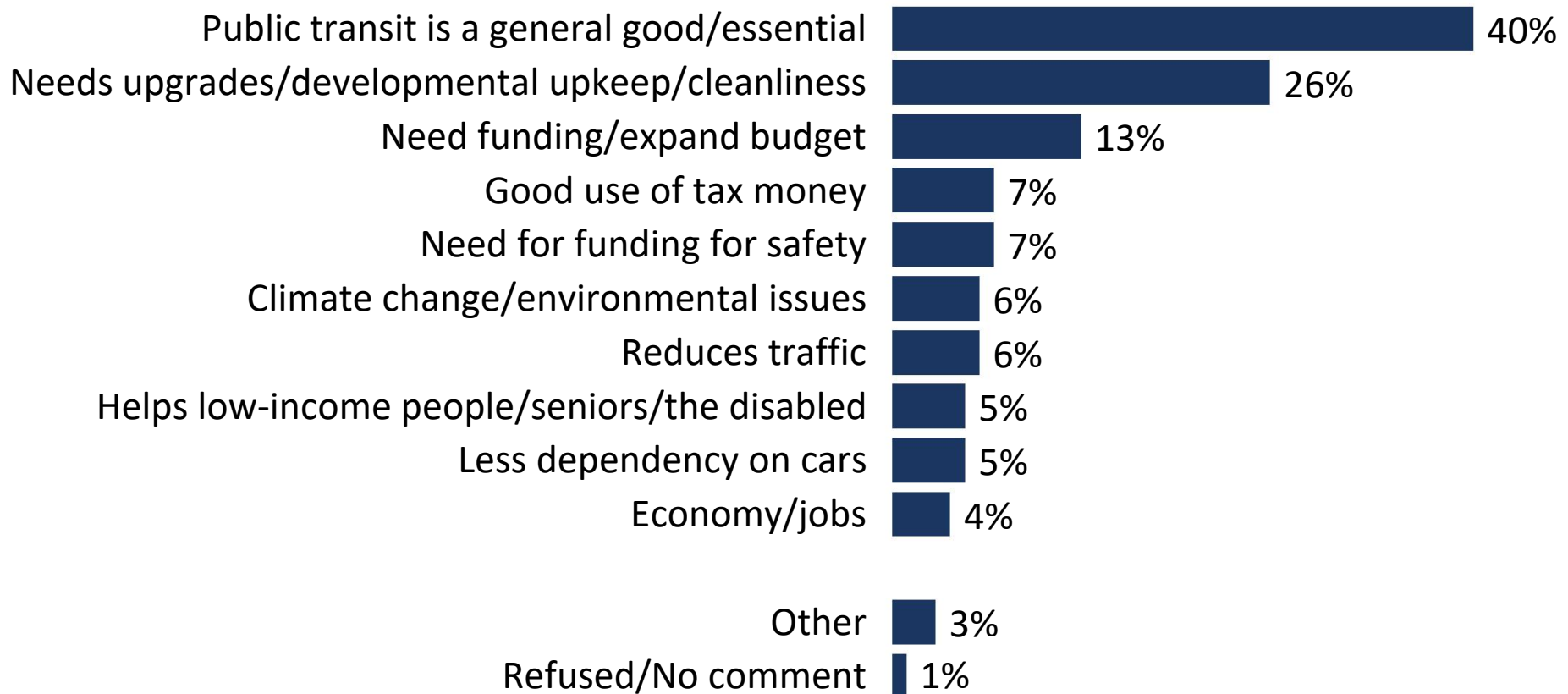
Initial Sales Tax Vote by Education & Residence



Supporters of the measure largely view public transit as essential and in need of upgrades.

*In a few words of your own, why would you vote **YES** on this measure?*

(Open-ended; Asked of Yes Voters Only, n=448)



Verbatim Responses from Supporters

BART is the lifeblood of this area; we can't survive without it.

I ride Caltrain and BART, and would do it more if they ran more often.

I support public transit funding, but do not like the open-ended timeline of this measure.

Not thrilled about another tax but we need transit improvements badly.

Public transit is good for the environment.

Public transportation is vital for any city and making it safe and clean makes it desirable.

Public transit is vital to our region, or economy, and equity.

Small price to pay to improve transit for everyone while reducing emissions.

Public transit is a hallmark of a modern society.

I am mobility-challenged & therefore use public transit for my daily commute to/from work.

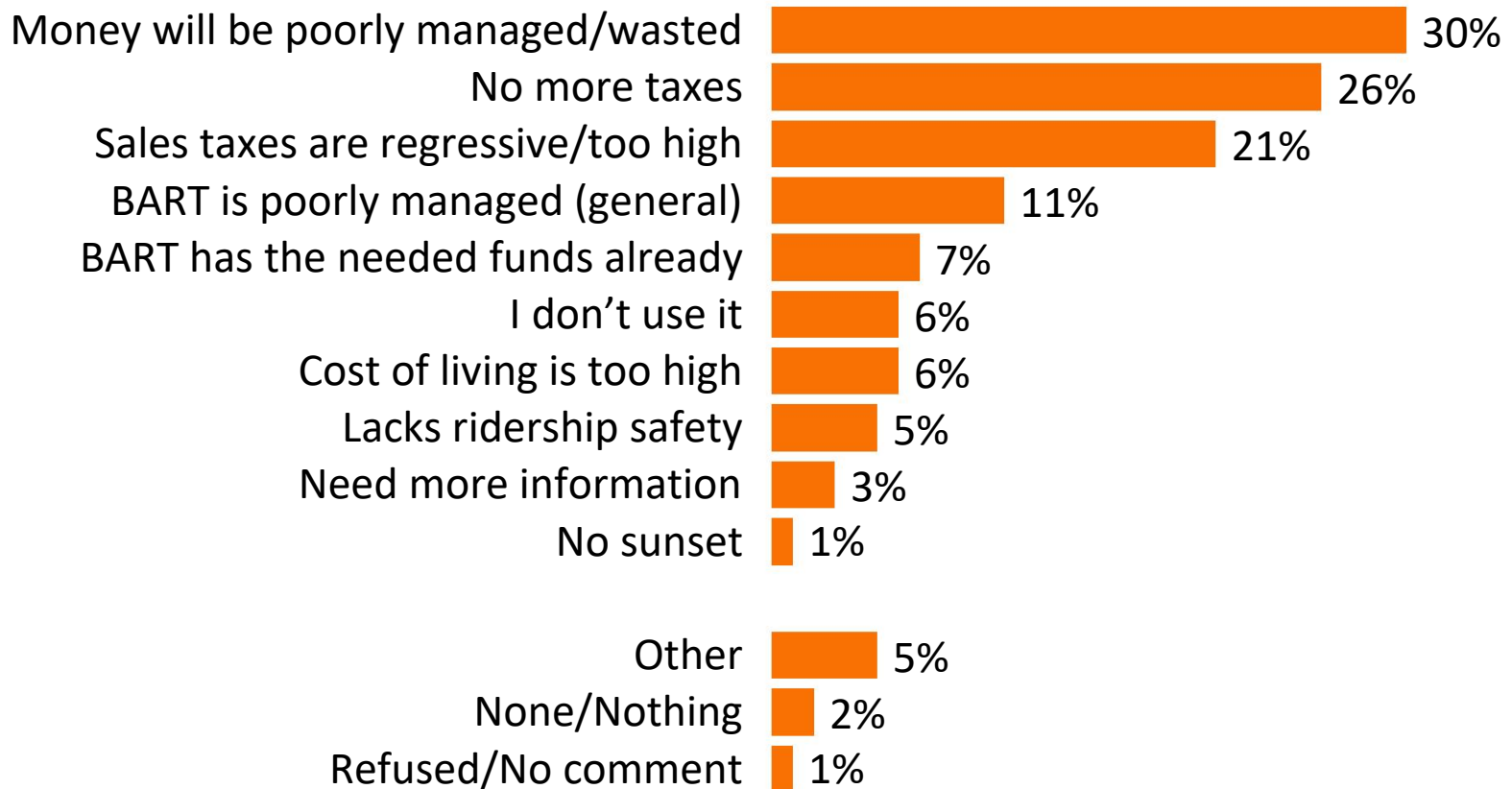
Safe and efficient public transportation cut down on traffic, parking problems, and benefits everyone including working class people. San Francisco could do more to help the people who make this city function.

Good to keep the trains running efficiently - though currently it's cheaper to drive from Oakland to SF than to BART, which is crazy.

Opponents are distrustful of how the money will be managed and oppose more taxes.

*In a few words of your own, why would you vote **NO** on this measure?*

(Open-ended; Asked of No Voters Only, n=377)



Verbatim Responses from Opponents

BART has ignored safety issues in the stations and trains for years and overpaid their employees. BART also has miss managed their money for decades, I'm not going to be charged a tax to fix their issues. I'd rather see it fail.

I feel that the money BART has already received has been poorly spent and I wouldn't want to support misuse of more money.

BART is terribly run. We should look to other cities that have managed to make rides affordable and stations safe at budgets that don't require tax payers to carry the burden of poor management. More money can't fix current problems until management can better run its services.

Poor record of getting anything done in a timely manner on budget.

Our sales tax is already ridiculously high and sales tax hits lower income people the worst.

No more taxes!
Democrats squander all the money and keep taxing us.

Public transit in the Bay Area is unsafe, ineffective, and effectively a jobs program for transit workers and bureaucrats.

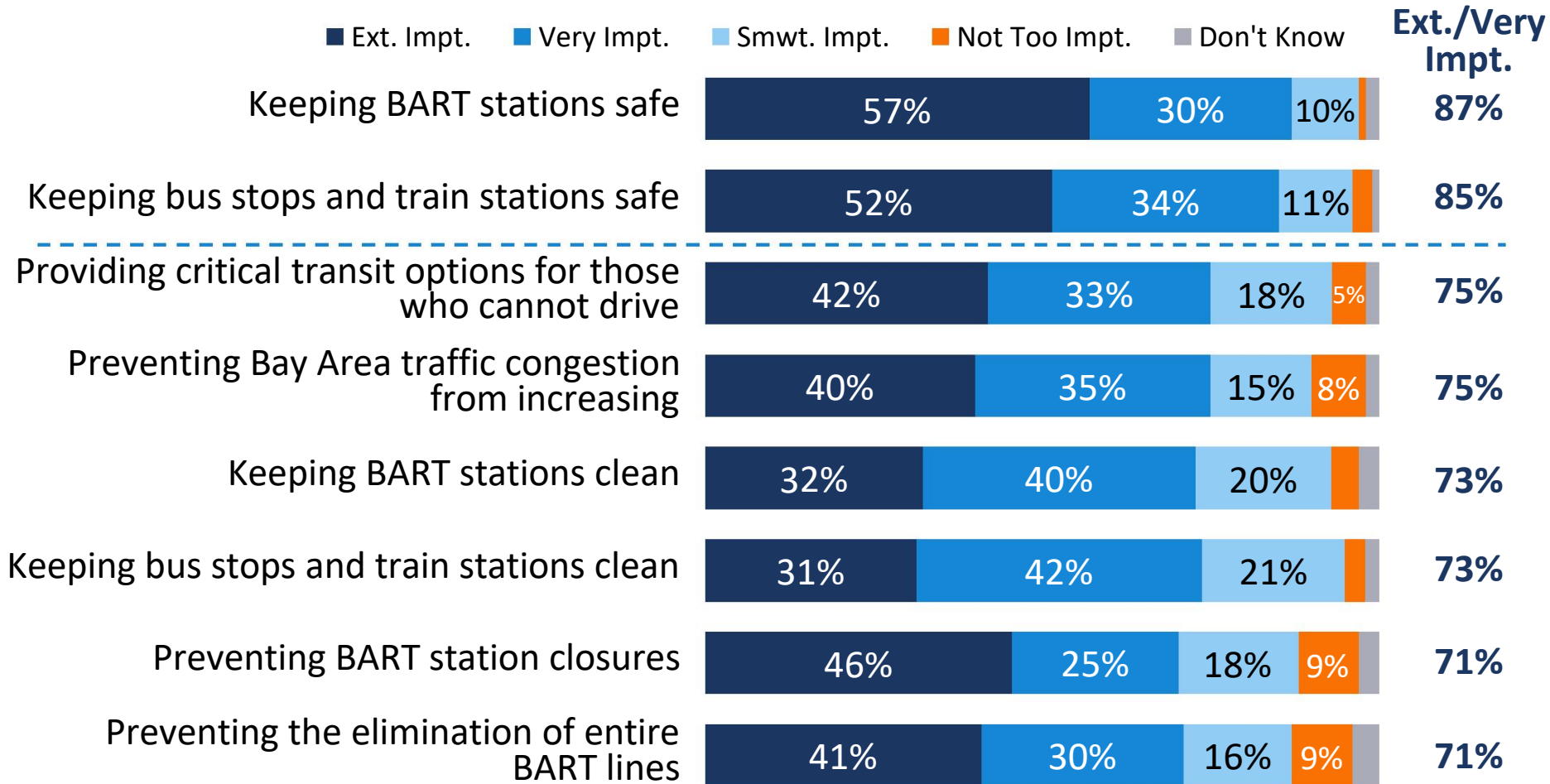
BART has incredible bureaucracy and bureaucratic waste; need to prove they can run efficiently before I can see throwing taxpayer dollars to keep them going

No more taxes, it's out of control.



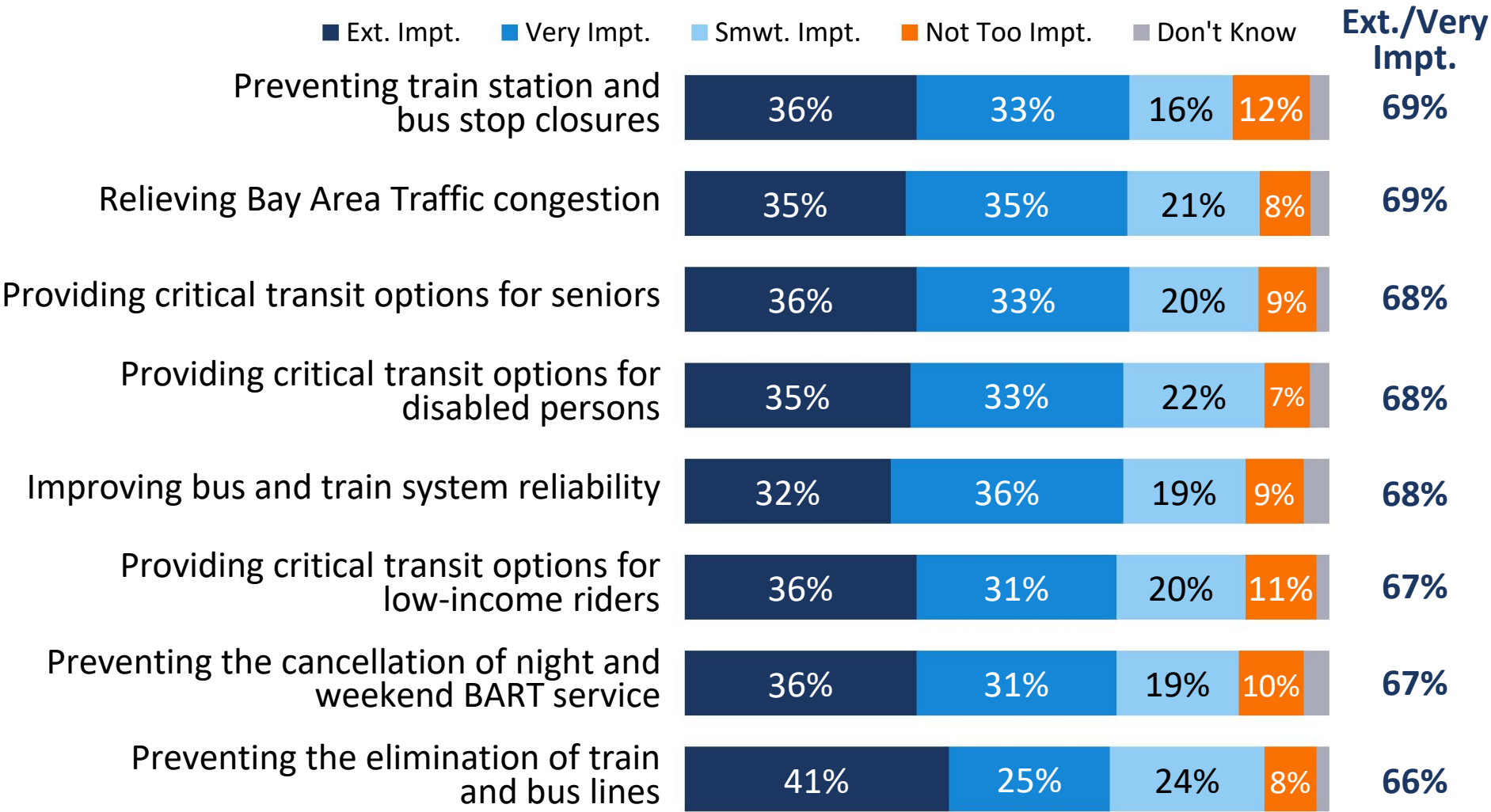
Measure Spending Areas

Station safety is the most important element of the measure for voters.



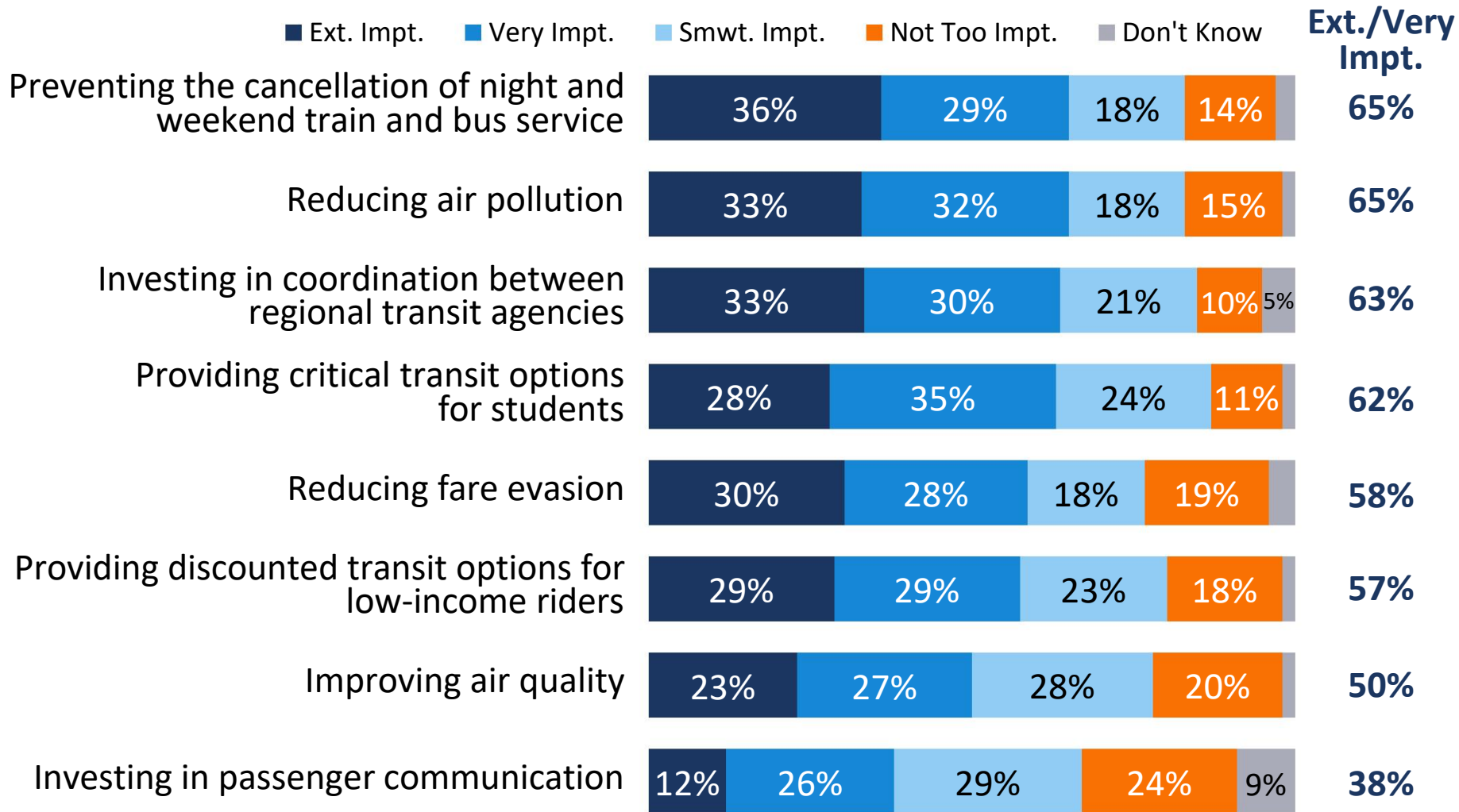
Q10. Please consider some potential elements of this measure, including ways in which funds it generates could be spent. Please indicate how important each one is to you personally, regardless of how you feel about the measure: either extremely important, very important, somewhat important, or not too important. Split Sample

Preventing station closures, relieving traffic, and providing transit for seniors and the disabled are also important to majorities.



FM3 RESEARCH Q10. Please consider some potential elements of this measure, including ways in which funds it generates could be spent. Please indicate how important each one is to you personally, regardless of how you feel about the measure: either extremely important, very important, somewhat important, or not too important. Split Sample

Investments in passenger communication is a low priority for voters.



Q10. Please consider some potential elements of this measure, including ways in which funds it generates could be spent. Please indicate how important each one is to you personally, regardless of how you feel about the measure: either extremely important, very important, somewhat important, or not too important. Split Sample

Besides closures, there was little difference in distinguishing between BART and bus/train services.

Measure Element	Importance	Measure Element
Preventing BART station closures	>	Preventing train station and bus stop closures
Preventing the elimination of entire BART lines	≈	Preventing the elimination of train and bus lines
Preventing the cancellation of night and weekend BART service	≈	Preventing the cancellation of night and weekend train and bus service
Keeping BART stations clean	≈	Keeping bus stops and train stations clean
Keeping BART stations safe	≈	Keeping bus stops and train stations safe

Q10. Please consider some potential elements of this measure, including ways in which funds it generates could be spent. Please indicate how important each one is to you personally, regardless of how you feel about the measure: either extremely important, very important, somewhat important, or not too important. Split Sample

Providing transit for those who cannot drive, in general, is more important than highlighting specific groups or providing transit discounts.

Measure Element	Importance	Measure Element
Preventing Bay Area traffic congestion from increasing	>	Relieving Bay Area traffic congestion
Reducing air pollution	>	Improving air quality
Providing critical transit options for those who cannot drive	>	Providing critical transit options for disabled persons / seniors / students / low-income riders
Providing critical transit options for seniors / low-income riders	>	Providing critical transit options for students
Providing critical transit options low-income riders	>	Providing discounted transit options for low-income riders

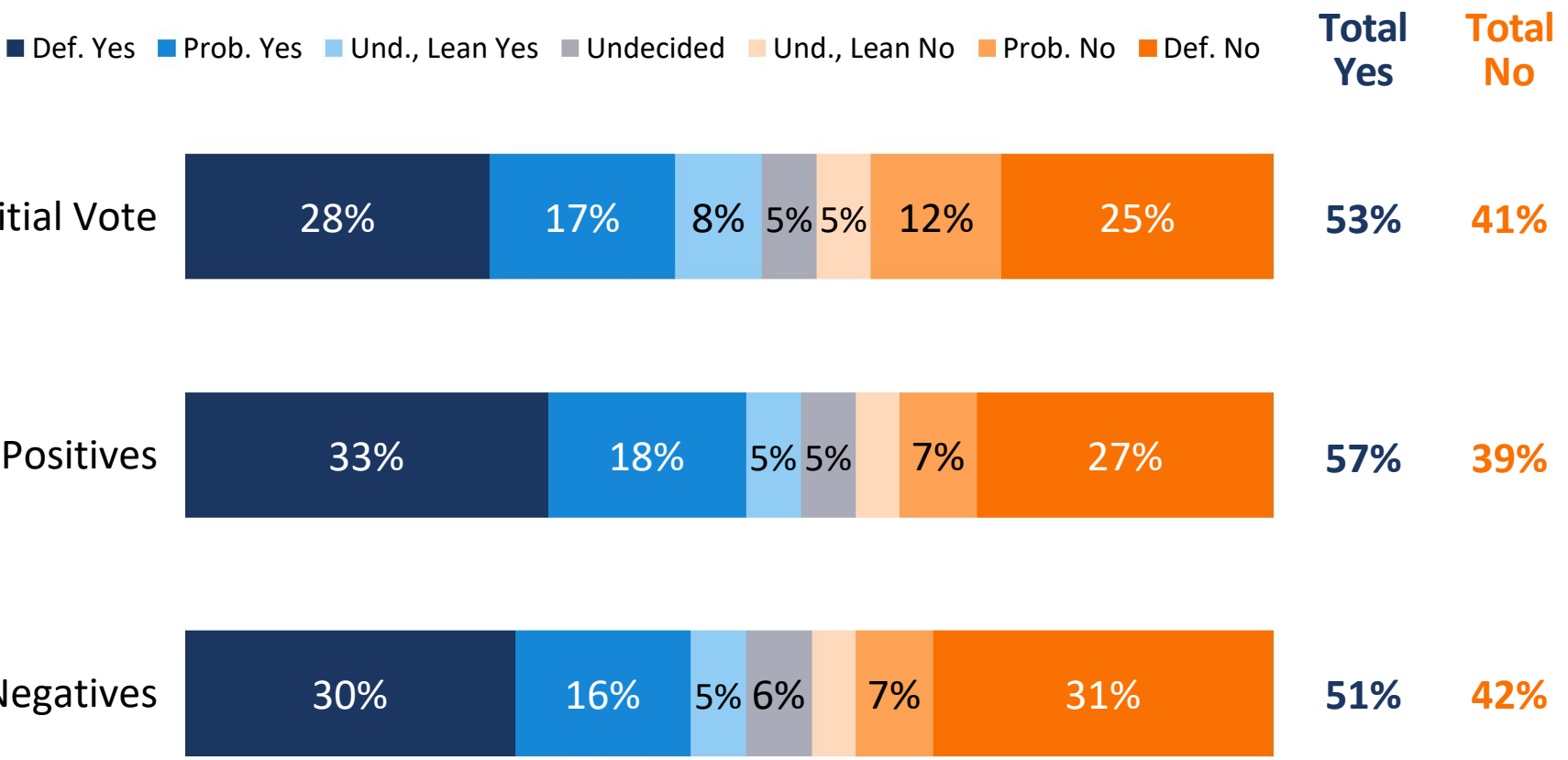
Q10. Please consider some potential elements of this measure, including ways in which funds it generates could be spent. Please indicate how important each one is to you personally, regardless of how you feel about the measure: either extremely important, very important, somewhat important, or not too important. Split Sample



The Impact of Pro and Con Arguments on a Sales Tax Measure

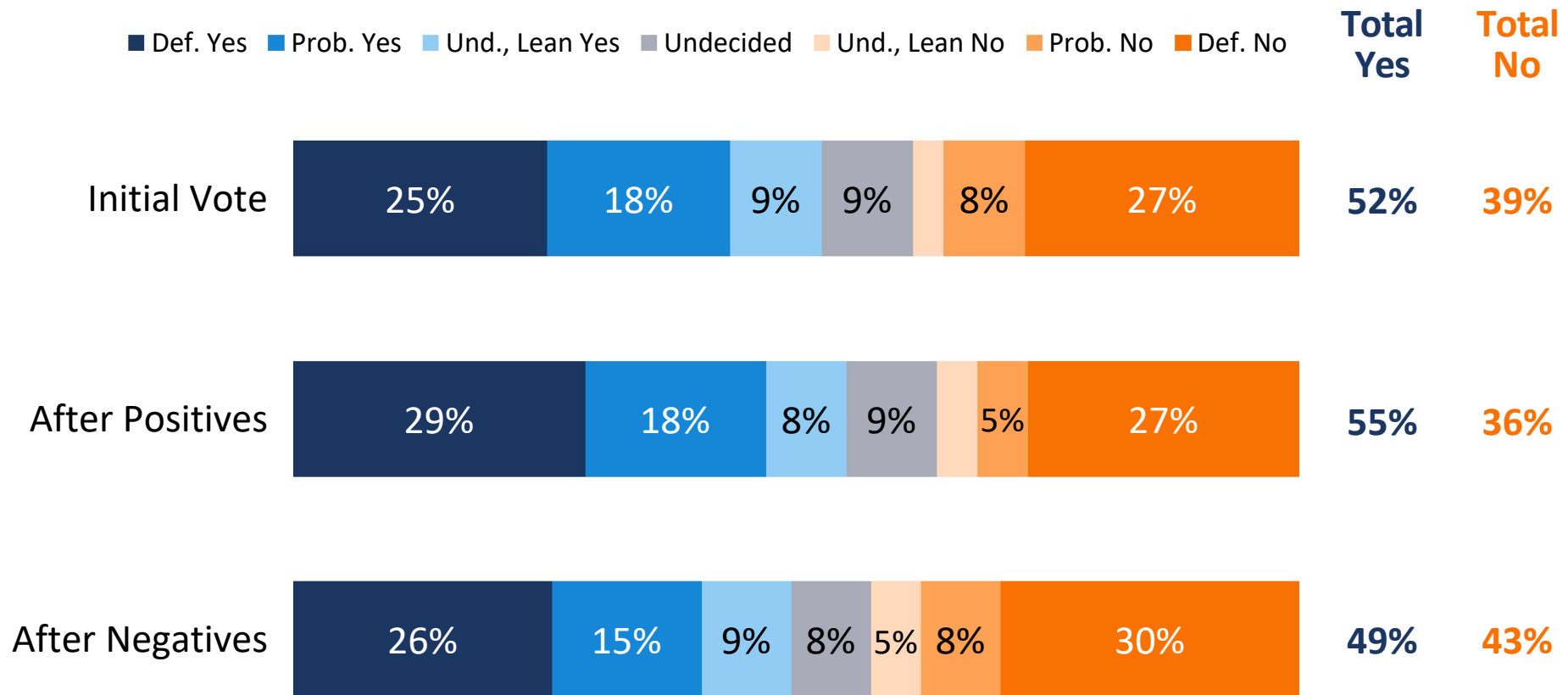
The “closure prevention” version of the sales tax never reaches support from two-thirds, but stays above 50%.

Closure Prevention Half-Sample



The same is largely true for the “maintain & improve” measure, though consistently a few points less.

Maintain & Improve Half-Sample

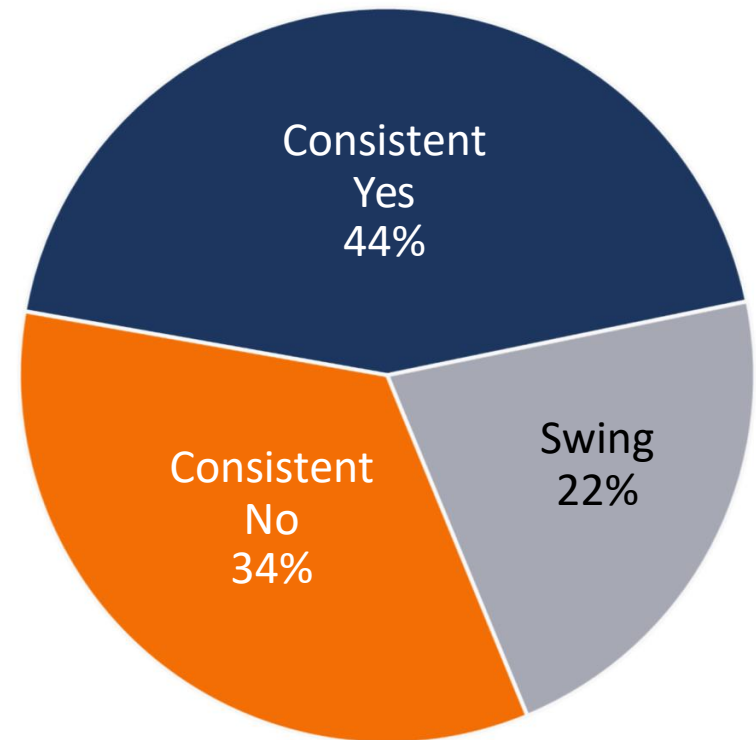


Segmenting the Electorate by Consistency of Support

Combining Both Versions and Using the Full Sample

- ❖ **Consistent Yes:** Voters who consistently indicated they would vote “yes” on the measure.
- ❖ **Consistent No:** Voters who consistently indicated they would vote “no” on the measure.
- ❖ **Swing:** Voters who do not fall into any of the other categories – remaining consistently undecided or switching positions.

The following slide shows demographic groups that *disproportionately* fall into one category or the other.

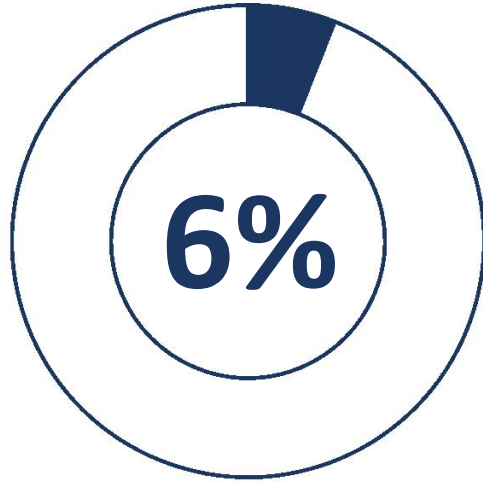


Demographic Profile of the Segments

Consistent Yes	Swing	Consistent No
44% of the Electorate	22% of the Electorate	34% of the Electorate
Rider Frequency: Weekly+	African American Voters	Republican Men & Women
Democrats Ages 18-49	Alameda Supervisorial District 4	Republicans of All Ages
Renters	BART District 4	Independents Ages 50+
Ages 30-39	Independent Women	Alameda Supervisorial District 1
Democratic Men & Women	San Mateo Supervisorial District 3	BART District 5
San Mateo Supervisorial District 5	Ages 18-29	Contra Costa County Supervisorial District 3
BART District 8	BART District 9	Never rides BART
San Mateo Supervisorial District 2	College-educated Women	Homeowners
San Francisco Voters	Alameda County Supervisorial District 2	Independent Men
BART District 9	Women Ages 18-49	BART District 6
White voters	Asian/Pacific Islander Voters	Non-college Educated Men

Voters under 30 are more fluid in their positions.

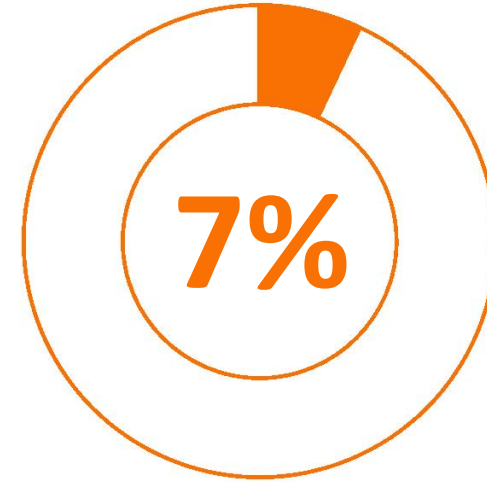
*Move to "Yes" Vote
with Positive Messages*



Voters most likely to have become supporters after hearing the pros:

- African American voters
- Live in BART District 4
- Ages 18-29

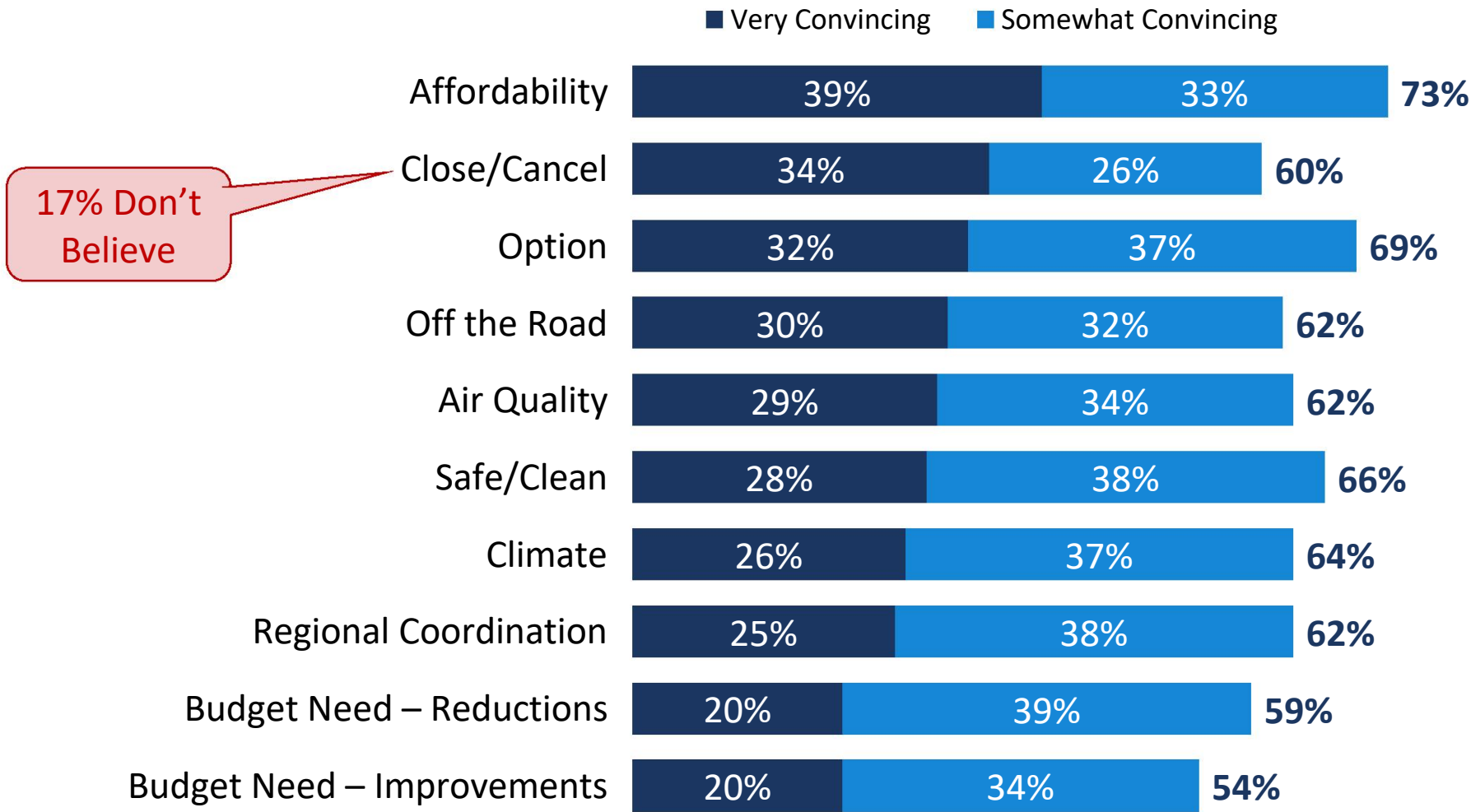
*Move to "No" Vote with
Negative Messages*



Voters most likely to become opponents after hearing all messages:

- Republicans, especially those under 50
- Ages 18-29
- Live in BART District 7

The critical role BART plays in the region for those without a car is a highly effective argument.



For softly supportive or undecided voters, affordability and the threat of closures are key.

Statement	Very Convincing						
	All Voters	Soft Supp./ Undec.	Targets			Movers	
			Cons. Yes	Swing	Cons. No	Positive Movers	Negative Movers
Affordability	39%	46%	62%	36%	8%	54%	28%
Close/Cancel	34%	40%	58%	30%	5%	40%	24%
Option	32%	37%	55%	28%	8%	33%	33%
Off the Road	30%	37%	54%	24%	4%	27%	22%
Air Quality	29%	30%	49%	23%	9%	33%	21%
Safe/Clean	28%	36%	47%	22%	7%	25%	24%
Climate	26%	27%	44%	22%	3%	34%	17%
Regional Coordination	25%	34%	43%	20%	3%	26%	9%
Budget Need – Reductions	20%	20%	31%	24%	3%	29%	15%
Budget Need – Improvements	20%	26%	33%	18%	5%	22%	9%

Positive Arguments

Ranked by Very Convincing

39%	(AFFORDABILITY) At a time when everyday people are struggling to make ends meet, slashing public transit service would make things even worse. For those who can't drive or afford a car payment, gas, insurance, parking and tolls — or can only afford housing farther away from the major job centers — BART and other services are necessary lifelines.
34%	(CLOSE/CANCEL) Without this additional funding, BART and other transit systems will have to take drastic actions, including closing stations and stops, cancelling weekend and evening service, and eliminating entire lines. Voting “yes” ensures that we can preserve service at current levels without these major service cuts.
32%	(OPTION) This measure will ensure public transit is a great option for those who don't want to drive or can't drive. This serves all riders, from the daily commuter to the occasional rider going to the airport or a concert. Keeping the system in safe, clean, and reliable condition means it will always be there when you need it. And it ensures those who can't drive, like certain people with disabilities, youth, or seniors, have the option as well.
30%	(OFF THE ROAD) Traffic is already back to pre-pandemic levels – or worse – in many parts of the Bay Area. Life without this measure would be worse for all of us. Without this measure, BART and other transit systems will need to scale back their services, putting tens of millions more cars on the road each year, clogging up our freeways, local streets, and parking lots.

Positive Arguments; Continued

Ranked by Very Convincing

29%

(AIR QUALITY) Public transit takes tens of millions of cars off the road per year throughout the Bay Area, and reduces the air pollution from traffic jams. That means cleaner air for the entire region. We all benefit from this measure, whether we ride public transit or not.

28%

(SAFE/CLEAN) Nothing is more important than rider safety – that's why this measure would invest in keeping stations and stops, trains and buses clean and safe through regular cleaning and maintenance, as well as more staff presence to reduce fare evasion, prevent littering and vandalism, connect riders in need with social services, and to de-escalate crisis situations. This will keep riders safe as they travel around the Bay Area.

26%

(CLIMATE) Public transit takes tens of millions of cars off the road per year throughout the Bay Area, and is critical to addressing climate change. And as more trains and buses become greenhouse-gas free, this measure will be even more essential to getting cars off the road and reducing carbon and other tailpipe emissions contributing to our warming climate.

Positive Arguments; Continued

Ranked by Very Convincing

25%

(REGIONAL COORDINATION) World-class transit systems are critical to the economic vitality of major metropolitan areas. This measure will keep the Bay Area moving and ensure our transit agencies are able to coordinate fares, schedules and convenient transfers throughout the region and maintain our local economy and make it even easier to use transit across the region.

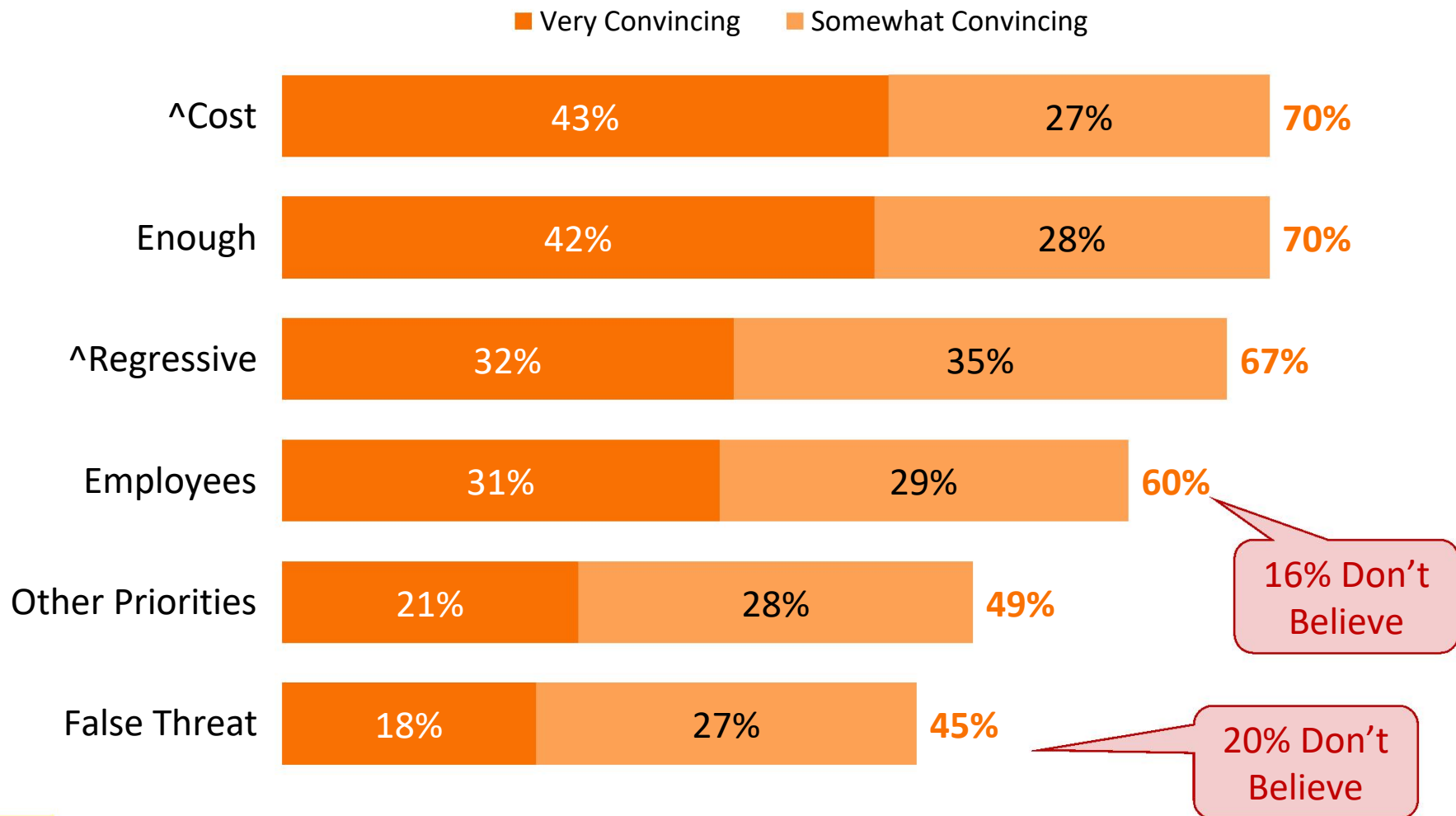
20%

(BUDGET NEED — REDUCTIONS) Remote work has fundamentally changed transit ridership, greatly reducing the number of daily commuters and fare revenue. But, our transit systems still remain critical for reducing traffic congestion and providing transportation alternatives. We need this measure to adapt to the new reality and prevent drastic reductions to Bay Area transit services.

20%

(BUDGET NEED — IMPROVEMENTS) Remote work has fundamentally changed transit ridership, greatly reducing the number of daily commuters and fare revenue. But, our transit systems still remain critical for reducing traffic congestion and providing transportation alternatives. We need this measure to adapt to the new reality and help keep the Bay Area's trains and buses clean, safe, and running on-time.

The cost of living and record of other funding measures stand out as negative arguments.



For swing voters, the cost of living and prior funding measures are compelling.

Statement	Very Convincing						
	All Voters	Soft Supp./ Undec.	Targets			Movers	
			Cons. Yes	Swing	Cons. No	Positive Movers	Negative Movers
^Cost	43%	29%	21%	46%	71%	47%	51%
Enough	42%	29%	18%	46%	67%	38%	53%
^Regressive	32%	31%	25%	36%	39%	41%	33%
Employees	31%	21%	20%	32%	45%	29%	31%
Other Priorities	21%	15%	7%	26%	35%	29%	33%
False Threat	18%	10%	6%	14%	36%	13%	15%

Negative Arguments

Ranked by Very Convincing

43%	^(COST) The cost of living in the Bay Area is out of control, and we already have one of the highest sales taxes in the country. The last thing we need to do is raise the price of everyday goods through yet another sales tax.
42%	(ENOUGH) We approved billions of dollars in funding for BART and other transit agencies in the past decade, and the state and federal government has given them billions in bailout dollars – now they’re back for more. We should vote “no” on any new measure until these agencies can prove that the initial funding has been spent wisely and within budget to create a clean, safe, reliable transit system.
32%	^(REGRESSIVE) Sales taxes are regressive – meaning that poor people pay a greater share of their income than the rich. We shouldn’t be taxing low-income and working people any more right now.
31%	(EMPLOYEES) The executives at the Bay Area’s transit systems — and even train operators and bus drivers — receive gold-plated benefits and high salaries. This measure would be used for “operations” – which really means paying them even more. When the average worker is struggling to make ends meet, we shouldn’t provide new funding that would line the pockets of some of the best-paid workers in the Bay Area.
21%	(OTHER PRIORITIES) Sure, we would all like to see improvements at BART and other transit systems, but that’s just not a priority right now. Our tax dollars should be spent on more pressing issues like affordable housing, homelessness, public safety, and fixing pothole-ridden roads, instead of nicer trains, buses, and transit stations.
18%	(FALSE THREAT) Do we really think BART and other transit agencies are going to shut down stations and entire lines? Of course not. This measure is just another scare tactic and without it they will eventually figure something out to keep the trains and buses running.



Conclusions

Conclusions

- The mood in the Bay Area is negative.
- A half-cent sales tax to fund BART and other transit agencies falls short of the two-thirds needed for approval – either with a “closure prevention” or “maintain & improve” framing.
 - Adding San Mateo and Santa Clara Counties does not change that picture.
 - Concerns about the cost of living and homelessness are much more urgent than anything related directly to transit, such as air quality or traffic.
 - Asked more directly, just 53% of voters see even “some need” for additional funding for BART, and fewer than two-thirds say the same for transit more broadly.
 - While positive arguments lift support slightly, it remains short of two-thirds, and negative arguments pushed support to just 50%.
- Voters’ top priorities for additional funding include safety, preventing traffic from worsening, and cleanliness, as well as remaining an option for those who cannot drive. They are less concerned with communications and coordination.
- An alternative \$524 annual parcel tax is not viable.

Support in this current survey is similar to 2022 and notably lower than during the lead up to Measure RR.

Survey Year	Initial Yes Vote	Yes Vote After Positives	Yes Vote After Negatives
2013 <i>(Initial Bond Survey)</i>	70%	76%	69%
2016 <i>(Final Bond Survey before Placement of RR)</i>	73%	77%	67%
2022 <i>(Initial ½ Cent Sales Tax Survey – BART Counties)</i>	57%	59%	45%
2024 <i>(Tracking ½ Cent Sales Tax Survey – BART Counties)</i>	54%	57%	51%

Measure RR passed with a “yes” vote of 70.53%

**For more information,
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