



Survey of Likely November 2026 Voters
9-County Bay Area, CA
Hybrid Email-/Text-to-Web/Live Telephone Survey
Conducted October 16 – 31, 2023
n=2,700; Overall Margin of Error ± 1.89 percentage points
EMC Research #23-9067

All numbers in this document represent percentage (%) values, unless otherwise noted.
Please note that due to rounding, percentages may not add up to exactly 100%.

Where applicable, results are compared with:
Survey of Registered Voters
9-County Bay Area, CA
March 14 – 23, 2023
n=1800; MoE: ± 2.31
EMC #23-8832

SPLIT SAMPLE FOR BALLOT QUESTIONS: (sample size per split = 900n; MoE: ± 3.27)

1. A: [*Half-cent Sales Tax*]
2. B: [*Income Tax*]
3. C: [*Payroll Tax*]

GREETING: Hello, my name is _____, may I speak with **(NAME ON LIST)**?

INTERVIEWER: NOL ONLY

INTRO: Hello, my name is _____, and I'm conducting a survey for _____ to find out how people feel about issues in the Bay Area. We are not trying to sell anything and are collecting this information on a scientific and completely confidential basis.

	<u>Mar. '23</u>	<u>Oct. '23</u>
1. Are you registered to vote in (INSERT COUNTY FROM SAMPLE) ?		
Yes	100	100
No → TERMINATE	-	-
(Don't know/Refused) → TERMINATE	-	-
2. Do you feel that things in the Bay Area are generally going in the right direction or do you feel things have gotten pretty seriously off on the wrong track?		
Right direction	39	33
Wrong track	54	62
(Don't know/Refused)	8	5

Mar. '23 **Oct. '23**

3. **What do you think is the most important problem facing the Bay Area today? (OPEN ENDED QUESTION; VERBATIMS CODED INTO CATEGORIES BELOW)**

Crime/Drugs	16	27
Homelessness	24	25
Affordable housing	10	18
Cost of living	9	10
Partisanship/Government	4	4
Jobs/Economy	5	3
Traffic/Congestion	3	2
Road repairs/Infrastructure	2	1
Public transit	0	1
Climate change/Environment	3	0
Other	12	9
None/Don't know/No opinion	2	1

4INT. On a scale from 1 to 7 where 1 is not at all concerned and 7 is extremely concerned, how concerned are you about each of the following in the Bay Area?

	Not at all concerned				Extremely concerned			(Don't know)	Mean
SCALE:	1	2	3	4	5	6	7		
(RANDOMIZE)									
4. Traffic									
Oct. '23	4	5	12	18	21	15	24	0	4.88
Mar. '23	4	6	10	18	22	14	25	0	4.92
5. The local economy									
Oct. '23	3	6	10	16	21	16	28	0	5.05
Mar. '23	3	5	8	17	21	14	30	1	5.13
6. The overall quality of public transit									
Oct. '23	8	7	13	18	21	13	17	2	4.48
Mar. '23	8	8	12	18	20	13	19	3	4.51
7. The condition of streets and roads									
Oct. '23	2	7	10	17	23	17	24	0	4.97
Mar. '23	2	5	10	15	22	15	32	0	5.21
8. Greenhouse gas emissions and climate change									
Oct. '23	14	7	8	11	15	14	30	1	4.70
Mar. '23	13	6	7	13	17	12	31	1	4.77
9. Homelessness									
Oct. '23	1	1	2	5	10	17	63	0	6.25
Mar. '23	2	1	3	6	12	17	60	0	6.14
10. Public safety									
Oct. '23	1	3	7	11	17	15	45	0	5.64
Mar. '23	2	4	7	13	18	15	41	0	5.48
11. The affordability of housing									
Oct. '23	4	2	5	8	11	14	55	0	5.83
Mar. '23	4	2	4	7	13	14	55	0	5.86

(END RANDOMIZE)

12. Do you feel there is a need for additional money to address transportation in the Bay Area? 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 improve transportation.

	<u>Mar. '23</u> ⁱ	<u>Oct. '23</u>
Great need	29	27
Some need	35	38
Little need	13	15
No real need	20	18
(Don't know/Refused)	3	1

13. There may be a measure on a future ballot in the Bay Area that reads:

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,

(ASK IF SPLIT = A) [Half-cent Sales 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?

(ASK IF SPLIT = B) [Income Tax] ... shall the measure enacting a 0.17% income tax for 30 years generating approximately \$1 billion annually, subject to oversight and audits, be adopted?

(ASK IF SPLIT = C) [Payroll Tax] ... 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?

If the election were held today, would you vote yes to approve or no to reject this measure?

	<u>Sales</u> <u>Tax</u>	<u>Income</u> <u>Tax</u>	<u>Payroll</u> <u>Tax</u>
Yes	54	50	54
(Lean Yes)	1	1	1
No	44	47	44
(Lean No)	0	1	1
(Undecided/Don't know/Not sure)	1	1	1
Total Yes	55	51	55
Total No	44	48	44

ⁱ In March 2023, n=900.

Mar. '23 Oct. '23

14INT. Now I'd like to ask you some more questions about public transit in the Bay Area – meaning BART, buses, light rail, Caltrain, SMART train, and ferries.

14. How important would you say public transit is for the Bay Area? Please use a scale from 1 to 7, where 1 means not at all important and 7 means very important.

1 – Not at all important	3	3
2	2	3
3	4	4
4	9	12
5	15	16
6	15	15
7 – Very important	51	47
(Don't know/Refused)	1	0
Mean	5.83	5.68

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

Strongly favorable	17	13
Somewhat favorable	38	40
Somewhat unfavorable	27	30
Strongly unfavorable	16	16
(Don't know)	2	1

16. Thinking about public transit in the Bay Area, please indicate which of the following statements is closer to your opinion.

We need to reduce public transit service now that that fewer people are using it by cutting routes, reducing frequency, and shortening service hours.	10	14
We need to maintain the public transit service we have in order to make sure it is there for people who depend on it.	87	83
(Both)	1	1
(Neither)	1	1
(No response/Refused)	1	1

17INT. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.

SCALE:	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	(Don't know)	Total Agree	Total Disagree
(RANDOMIZE)							
17.	We need stable, long-term funding for public transit in the Bay Area, even if it means raising taxes						
	28	29	17	25	1	57	43
18.	We need significant improvements to public transit in the Bay Area, even if it means raising taxes						
	24	30	18	27	1	54	45
19.	We need to address climate change in our transportation future, even if it means raising taxes						
	31	25	15	29	1	56	43

(END RANDOMIZE)

20INT. 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, using a scale of 1 to 7, where 1 means not at all a priority, and 7 means a very high priority.

SCALE:	Not at all a priority			Very high priority			(Don't know)	Mean	
	1	2	3	4	5	6	7		
(RANDOMIZE)									
20.	Expanding BART, train, ferry, light rail, and bus service to better connect commuters and communities across the Bay Area								
	8	4	7	10	16	18	38	0	5.27
21.	Making BART, trains, ferries, light rail, and buses safer, more reliable, affordable, and connected								
	4	3	4	9	16	18	45	0	5.66
22.	Improving safety and cleanliness on BART and other public transit								
	3	2	4	11	17	17	45	0	5.67
23.	Expanding access to electric vehicles and EV charging stations								
	15	5	8	14	18	14	25	1	4.56
24.	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	3	5	10	14	17	44	0	5.52
25.	Creating a seamless Bay Area transit network, with coordinated fares, routes, schedules, and signage								
	6	3	5	12	17	19	36	1	5.35
26.	Repairing potholes, repaving roads, and improving sidewalks and bike lanes to make getting around easier and safer for drivers, bicyclists, and pedestrians								
	2	2	4	10	19	19	43	0	5.71
27.	Protecting our major roads, transit routes, and communities from rising sea levels								
	15	7	8	14	18	13	25	1	4.51

SCALE:	Not at all a priority			Very high priority			(Don't know)	Mean	
	1	2	3	4	5	6			7
28.	Prioritizing transportation improvements in historically disadvantaged communities to ensure more equitable and safer transportation access								
	11	4	7	11	16	17	33	0	5.01
29.	Only allowing projects that will reduce greenhouse gas emissions								
	22	7	8	14	16	12	21	1	4.15
30.	Protecting air quality and preventing additional greenhouse gas emissions by avoiding road and freeway expansion								
	20	7	9	14	13	12	25	1	4.30
31.	Requiring the transportation plan has clear goals, along with the flexibility to adjust as transportation needs change								
	5	2	6	15	21	20	29	1	5.23
32.	Requiring oversight and accountability to ensure effective and efficient management of public transit								
	4	2	5	9	16	19	45	1	5.71
33.	Requiring Bay Area employers to implement programs that encourage alternatives to driving								
	16	5	7	13	18	14	27	1	4.61
34.	Merging BART and Caltrain into one integrated rail system								
	13	5	7	17	19	14	22	2	4.56
35.	Combining the 21 Bay Area bus operators into one bus operator per county to better coordinate service and save taxpayer money								
	10	3	5	16	20	19	25	1	4.96
36.	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								
	11	5	7	16	20	16	25	1	4.78

(END RANDOMIZE)

37. Now that you have heard more about the potential measure, I'd like to ask you about the measure again:

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,

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(ASK IF SPLIT = C) [Payroll Tax] ... 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?

If the election were held today, would you vote yes to approve or no to reject this measure?

	<u>Sales</u> <u>Tax</u>	<u>Income</u> <u>Tax</u>	<u>Payroll</u> <u>Tax</u>
Yes	58	53	58
(Lean Yes)	1	0	0
No	40	46	41
(Lean No)	0	1	0
(Undecided/Don't know/Not sure)	1	0	1
Total Yes	59	53	58
Total No	40	46	41

Oct. '23

(RANDOMIZE ORDER OF Q38-Q39)

- | | | |
|-----|--|----|
| 38. | 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) | 2 |
| | (Neither) | 2 |
| | (No response/Refused) | 2 |
| | | |
| 39. | Which of the following statements is closer to your opinion:
A transportation measure for the Bay Area should be developed at the local level with direct input from Bay Area residents. | 70 |
| | A transportation measure for the Bay Area should be developed at the state level to ensure accountability and coordination with the state. | 24 |
| | (Both) | 4 |
| | (Neither) | 1 |
| | (No response/Refused) | 1 |

(END RANDOMIZE)

40INT. **SAMPLE A:** Some say a sales tax is the right way to pay for transportation improvements because people who can afford to buy more will pay more, it ensures tourists are paying their fair share, and basic life expenses like groceries and rent aren't taxed.

Others say sales taxes are unfair, hurt low-income residents the most, and will just drive up the cost of everything in the Bay Area even more.

40INT. **SAMPLE B:** Some say an income tax is the right way to pay for transportation improvements because people who earn the most will pay the most, while low-income residents and seniors who can't afford it won't pay anything.

Others say income taxes in California are already high enough. An income tax increase will simply drive more people and jobs out of the Bay Area.

40INT. **SAMPLE C:** Some say a payroll tax is the right way to pay for transportation improvements because it forces local companies to pay for the roads and transit systems their workers and customers rely on.

Others say a payroll tax will simply drive up the cost of everything and push more companies out of the Bay Area.

(RESUME)

40. Given what you've heard, would you vote yes to approve or no to reject the proposed transportation measure?

	<u>Sales</u> <u>Tax</u>	<u>Income</u> <u>Tax</u>	<u>Payroll</u> <u>Tax</u>
Yes	51	50	54
(Lean Yes)	1	0	1
No	45	48	44
(Lean No)	0	0	1
(Undecided/Don't know/Not sure)	2	1	1
Total Yes	53	50	54
Total No	46	48	44

DEMOS. My last questions are for statistical purposes only.

41. Do you own or have access to a motor vehicle that you are able to use regularly, such as a car, truck, or motorcycle?

	<u>Mar. '23</u>	<u>Oct. '23</u>
Yes	91	90
No	8	9
(Refused)	1	2

42INT. Please tell me how often you do each of the following, on average.

SCALE:	5 days or more	3 – 4 days a week	1 – 2 days a week	At least monthly	Less than monthly	Rarely or never	(DK/Refused)
42. Make a commute trip to work, school, or another regular destination ⁱⁱ							
Oct. '23	41	21	16	5	3	11	2
Mar. '23	33	21	17	9	4	16	1
43. (ASK IF COUNTY ≠ SAN FRANCISCO; n = 2,398) Make a trip to a destination in San Francisco for any purpose	5	4	8	19	23	38	2
44. Drive alone	36	20	19	7	2	14	2
45. Ride in a car with others (Carpool, Uber, Lyft, Taxi)	5	7	12	16	13	45	2
46. Walk for transportation	14	10	13	10	7	45	3
47. Bike for transportation	2	3	5	5	5	76	3
48. Ride BART	2	2	4	11	17	62	3
49. Take a public bus, light rail, or ferry	3	4	5	10	14	62	2
50. Take a train (e.g. Caltrain, Amtrak, ACE)	1	1	1	7	14	74	3

ⁱⁱ Asked in March 2023 as “Make a physical commute trip to work, school, or another regular destination”

	<u>Mar. '23</u>	<u>Oct. '23</u>
51. Do you currently own the home or apartment where you live, do you rent, do you live with family, or do you not have stable housing?		
Own/buying	55	54
Rent/lease	31	33
Live with family	10	11
No stable housing	1	1
(Refused)	2	2
52. Do you consider yourself to be Hispanic or Latinx, white or Caucasian, African American or Black, Chinese, Filipino or Pacific Islander, another Asian identity, or something else? (MULTIPLE RESPONSES ACCEPTED)		
Hispanic or Latinx	17	16
White or Caucasian	52	54
African American or Black	6	6
Chinese	8	7
Filipino or Pacific Islander	5	6
Another Asian identity	7	8
Something else	3	8
(Refused)	7	6
53. In what year were you born? (YEARS CODED INTO AGE CATEGORIES)		
18-29	13	12
30-39	16	15
40-49	16	16
50-64	27	27
65 or over	28	30
(Refused)	1	0
54. What is the last grade you completed in school?		
Some grade school	1	1
Some high school	2	1
Graduated High School	9	8
Technical/Vocational	5	4
Some College/Less than 4 year degree	21	22
Graduated College/4 year degree (BA, BS, Bachelor)	32	35
Graduate/Professional (MA, MS, Master, PhD, MBA, Doctorate)	28	27
(Refused)	2	2

	<u>Mar. '23</u>	<u>Oct. '23</u>
55. Do you identify as male, female, non-binary, or another gender identity?		
Male	49	49
Female	51	51
Non-binary	0	0
Another gender identity	0	0
(Refused)	0	0
56. What was your total household income before taxes for 2022? Was it...		
Less than \$25,000	8	6
\$25,000 to less than 50,000	9	10
\$50,000 to less than 75,000	10	11
\$75,000 to less than 100,000	10	13
\$100,000 to less than 150,000	15	17
\$150,000 and over	29	32
(Refused)	19	12
THANK YOU!		
LANGUAGE OF INTERVIEW		
English	91	93
Spanish	6	4
Chinese	3	3
PARTY REGISTRATION		
Democrat	58	59
Republican	15	15
NPP/Other	27	26
COUNTY		
Alameda	21	20
Contra Costa	16	16
Marin/Sonoma	11	12
Napa/Solano	8	8
San Francisco	11	12
San Mateo	10	10
Santa Clara	23	22
VOTE HISTORY (G18 P20 G20 S21 P22 G22)		
Infrequent Voter (0-3/6)	40	33
Frequent Voter (4-5/6)	30	34
Perfect Voter (6/6)	30	33