



Bay Area Transit & Transportation Survey

Metropolitan Transportation Commission
March 2023
For MTC Workshop – 4/26/23

Methodology

- ▶ Survey of 9-County Bay Area registered voters
- ▶ Conducted March 14-23, 2023
- ▶ 1,800 total responses
- ▶ Overall margin of error ± 2.31 percentage points at the 95% confidence interval
- ▶ Conducted via a hybrid methodology using live telephone interviews and email/text invitations to an online survey.
- ▶ Available in English, Spanish, and Chinese
- ▶ Telephone interviews were conducted by trained, professional interviewers using landlines and mobile phones

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

Revenue Measure Questions

- ▶ The poll included two questions to test initial reactions to potential regional ballot measures, but it was **not designed as an in-depth viability** poll.
- ▶ Voters each heard one version of a housing bond measure and one version of a transportation tax measure with the order randomized.
- ▶ The poll is reflective of attitudes **today**, more than 18 months before the November 2024 election and years away from 2026.
- ▶ There are a number of factors that could **significantly impact** future measures including:
 - legislation to revise AB-195 (Oberholte);
 - the Taxpayer Protection November 2024 proposition;
 - The overall economy and issue environment; and,
 - a potential measure to lower the threshold for affordable housing bonds.

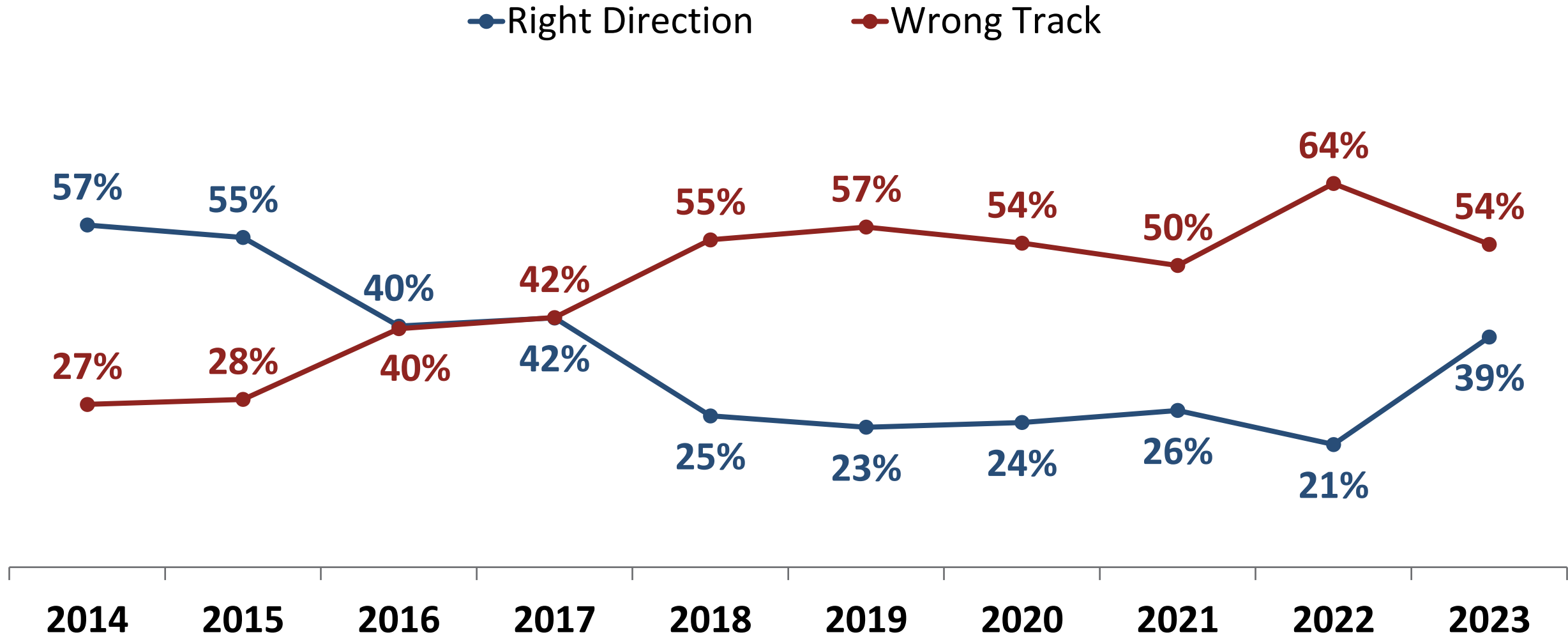
Overall Key Findings

- ▶ Overall mood in the Bay Area continues to be fairly pessimistic, with **homelessness**, **housing affordability** and **safety** topping voter concerns.
- ▶ Over two-thirds of voters think more money is needed to address **housing**. The tested measures fall short given the current threshold and wording requirements.
- ▶ There is widespread belief that **transit is important** for the Bay Area and that a high-quality public transportation system benefits all. Our current system does **not** receive **high ratings**.
- ▶ Just under two-thirds perceive a need for **transportation** funding. The tested measures **fall short** of the super-majority threshold.
- ▶ While 21% of voters say they are riding transit at least once a week, **only 6% ride daily**. Nearly 40% of all voters say they are **commuting less frequently** than pre-Covid.
- ▶ There is widespread willingness to increase transit usage, however, **convenience**, **speed** and **safety** are significant barriers.



Issue Environment

Direction of the Bay Area

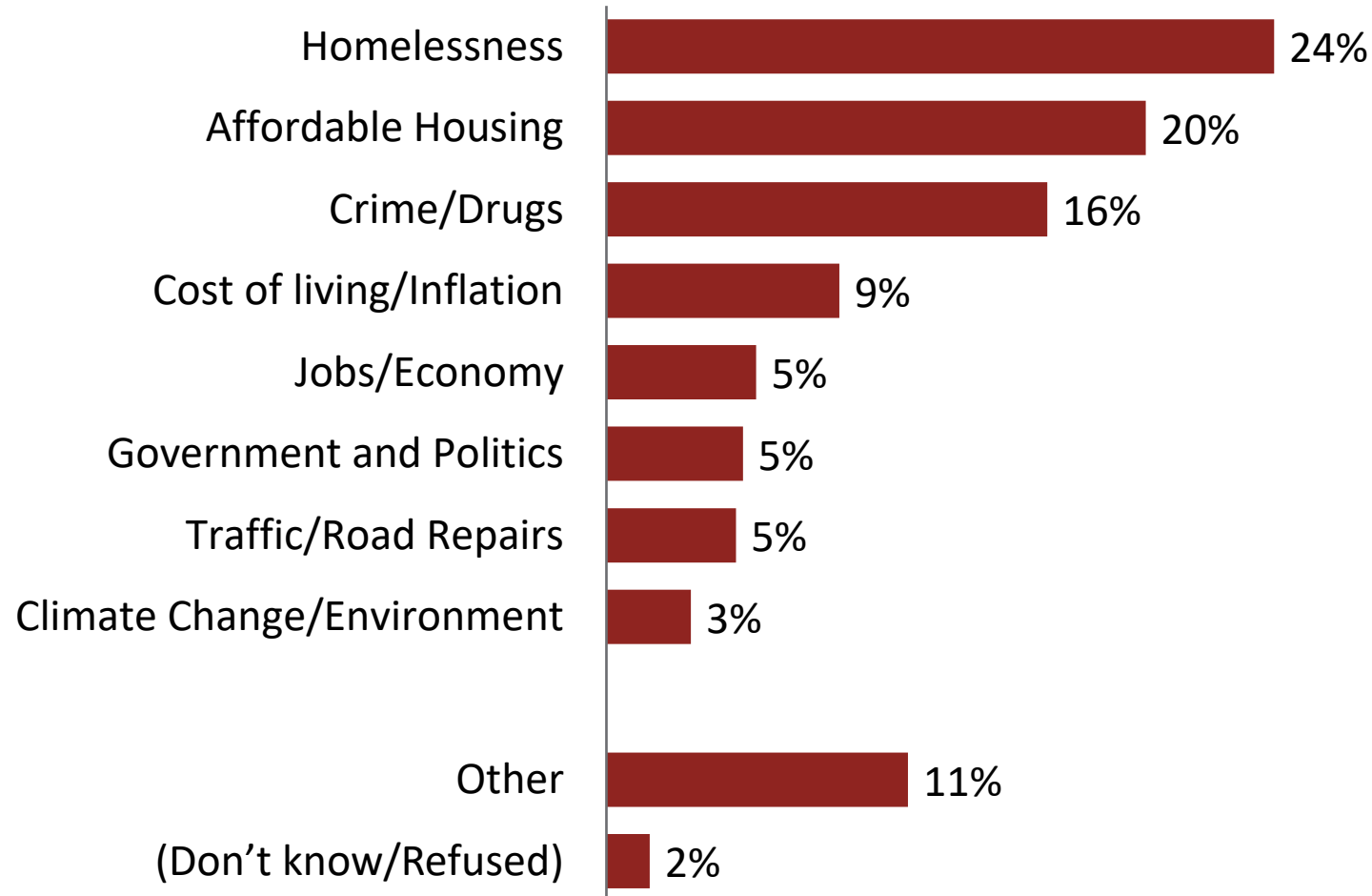


Q3. Do you feel things in the Bay Area are going in the right direction or do you feel things have gotten pretty seriously off on the wrong track?

*Trend source: Bay Area Council, Bay Area Poll

Most Important Problem

Homelessness and housing affordability are the most commonly mentioned problems facing the Bay Area.



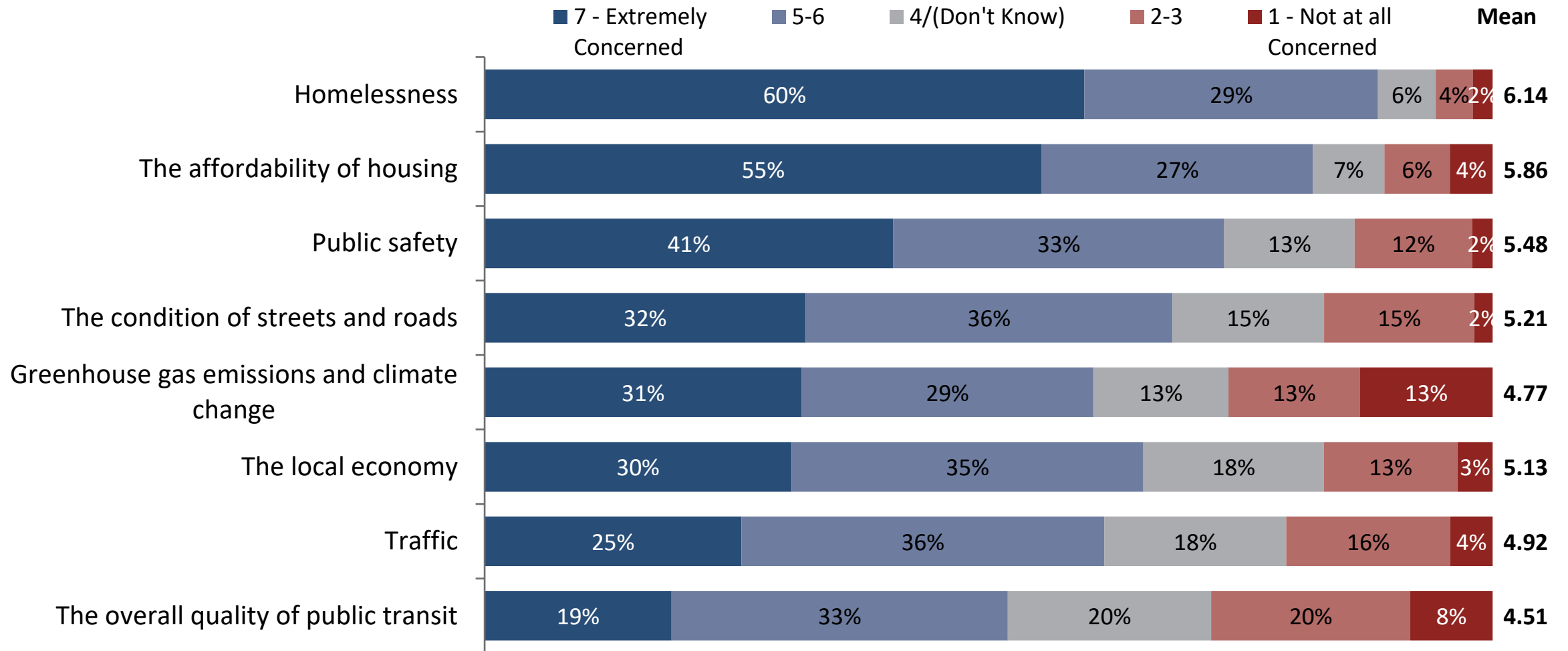
2019 (Pre-COVID)	%
Housing	34
Traffic/Roads	18
Homelessness	13
Cost of living	7
Crime	2

Q4. What do you think is the most important problem facing the Bay Area today?

*2019 source: Bay Area Council, Bay Area Poll (March 2019)

Issue Concern

Voters rate a number of issues as concerning - with especially high intensity about homelessness, housing and safety.



Q5-12. 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?



Housing

Perception of Need

Voters perceive a need for funding to address housing affordability.

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 housing affordability?

Total Need
69%

Some need 20%

Great need 49%

Total No Need
30%

Little need 10%

No real need 19%

Potential Housing Bond

Support for a housing bond is above 55% both with and without including the estimated levy.

Full Detail

To address housing affordability/homelessness by providing: stable housing for homeless children/families; housing with mental health/substance abuse services; and local housing that is affordable for vulnerable people including seniors, veterans, and persons with disabilities; shall the measure by the Bay Area Housing Finance Authority issuing up to \$10,000,000,000 in general obligation bonds with an estimated levy of 35 cents/\$1,000 of assessed value (generating \$670,000,000 annually) while bonds are outstanding, subject to oversight and audits, be adopted? **(75 words)**

Yes
58%

No
40%

(Undecided)
2%

Excluding AB195 Required Detail

To address housing affordability/homelessness by providing: stable housing for homeless children/families; housing with mental health/substance abuse services; and local housing that is affordable for vulnerable people including seniors, veterans, and persons with disabilities; shall the measure by the Bay Area Housing Finance Authority issuing up to \$10,000,000,000 in general obligation bonds, subject to oversight and audits, be adopted? **(57 words)**

Yes
65%

No
33%

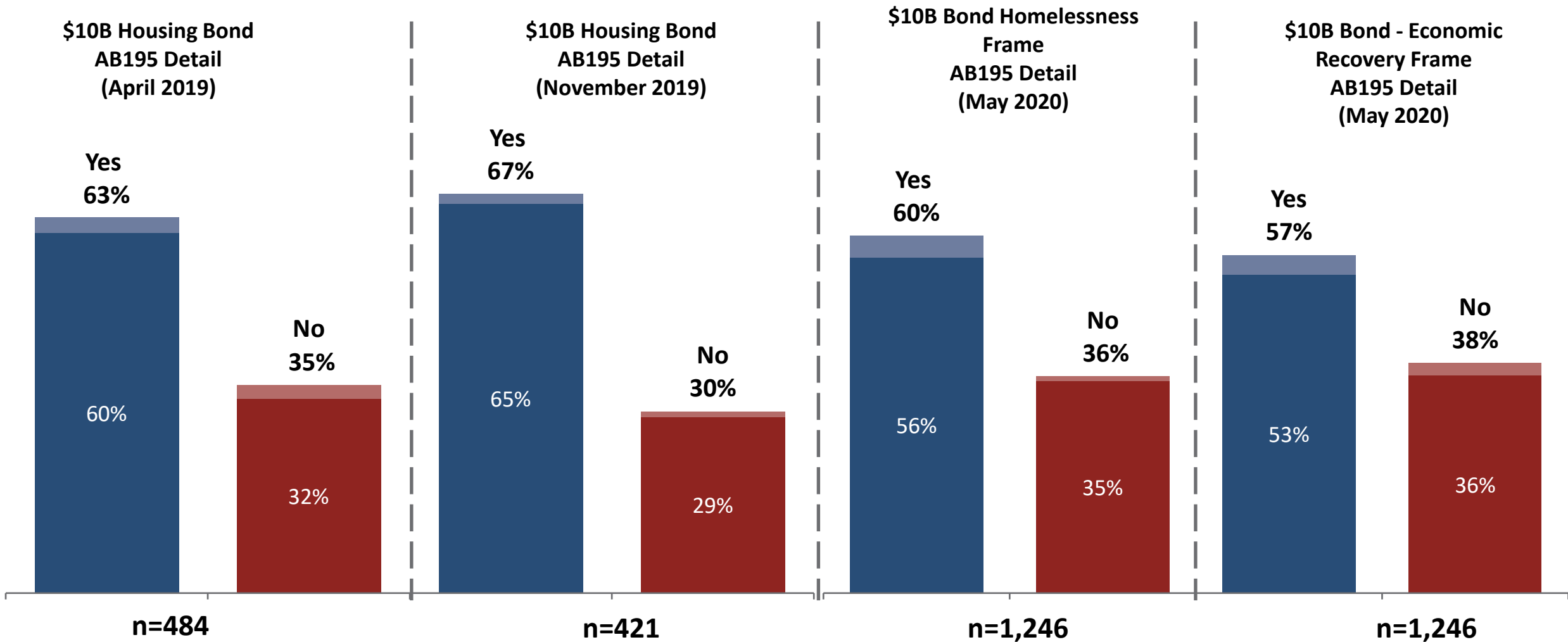
(Undecided)
2%

Q17-18. If the election were held today, would you vote yes to approve or no to reject this measure?

*Sample size for each ballot question = 900n, with a margin of error of ±3.3 percentage points

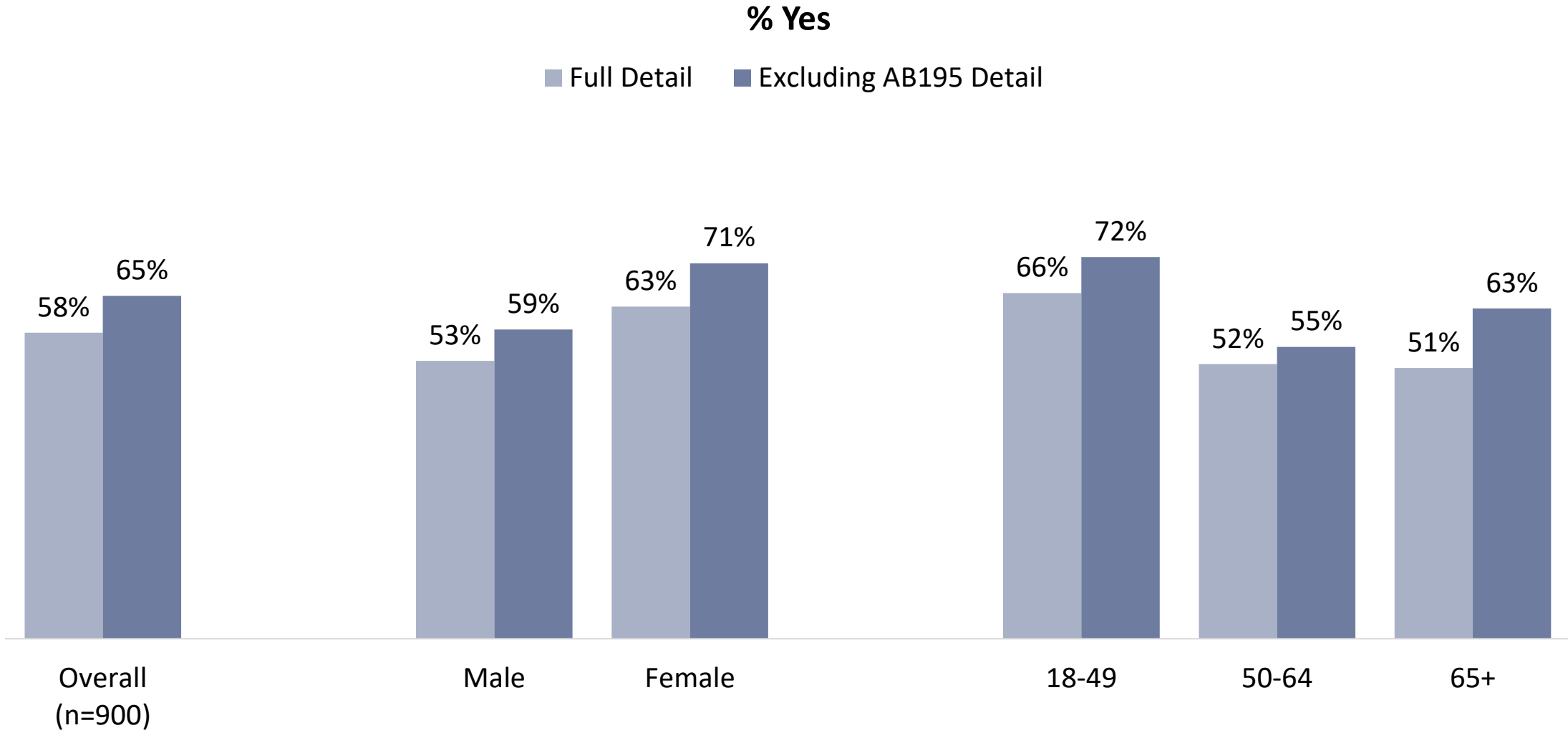
Previous Polling

Current level of support is somewhat consistent with previous polling.



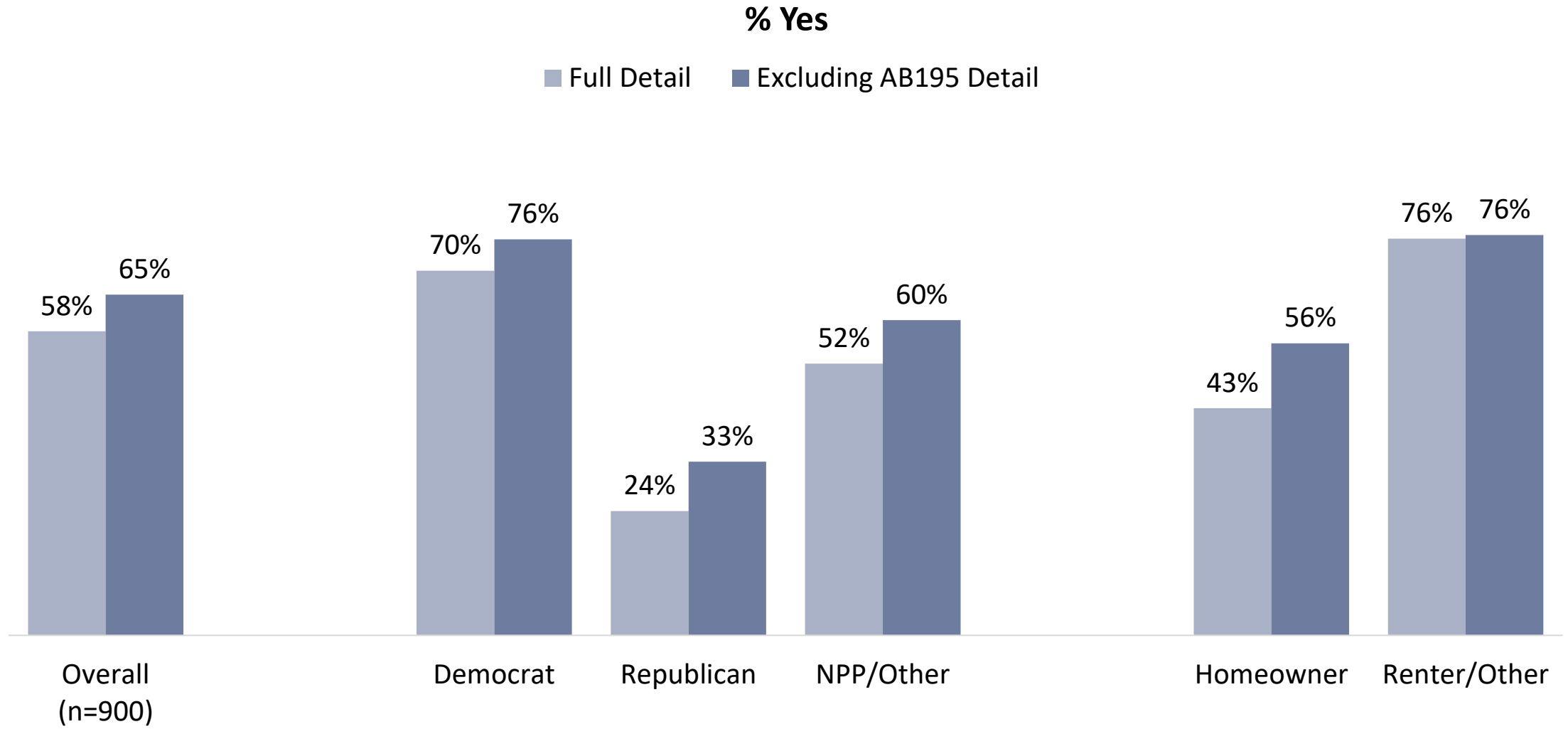
Note: The wording of the measure was different in each poll.

Housing Bond By Gender, Age



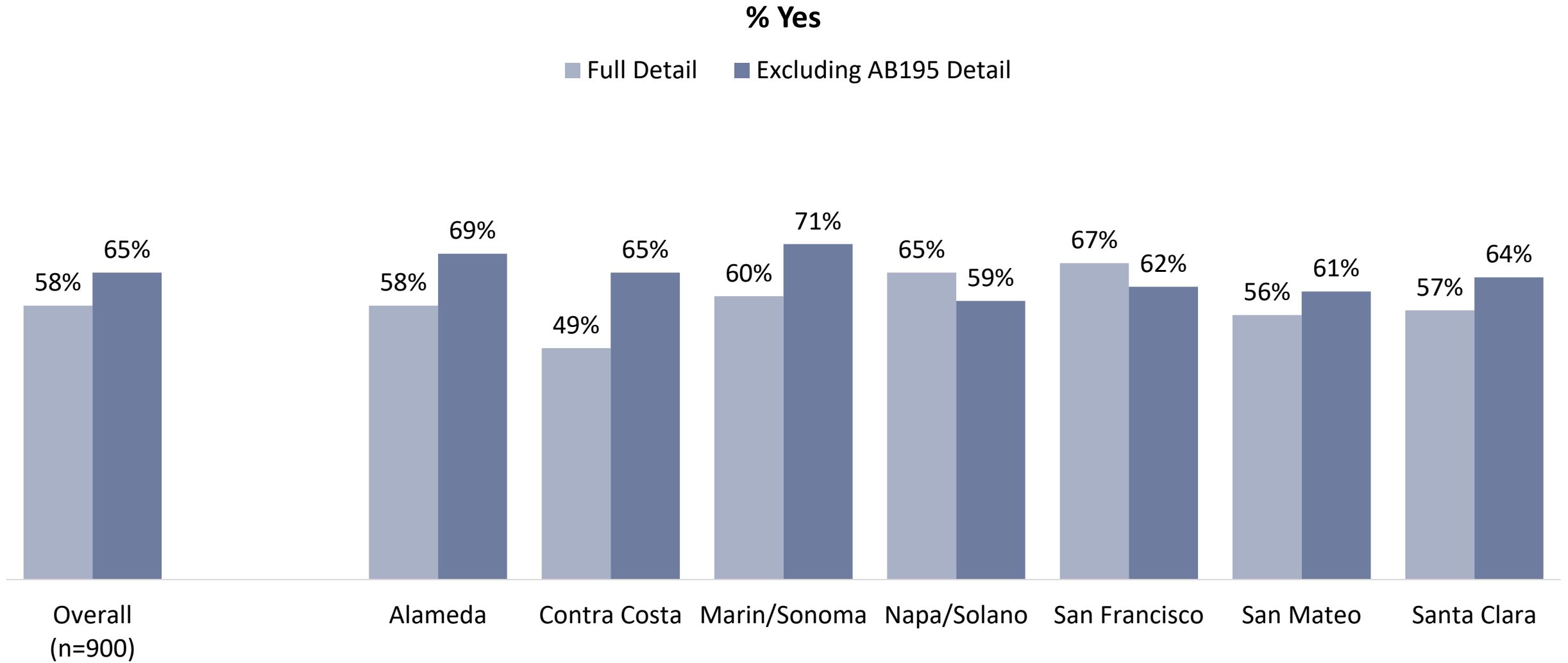
*Margin of error for each subgroup shown ranges from ±4.6 to 6.2 percentage points

Housing Bond By Party, Homeownership



*Margin of error for each subgroup shown ranges from ±4.3 to 8.2 percentage points

Housing Bond by Region

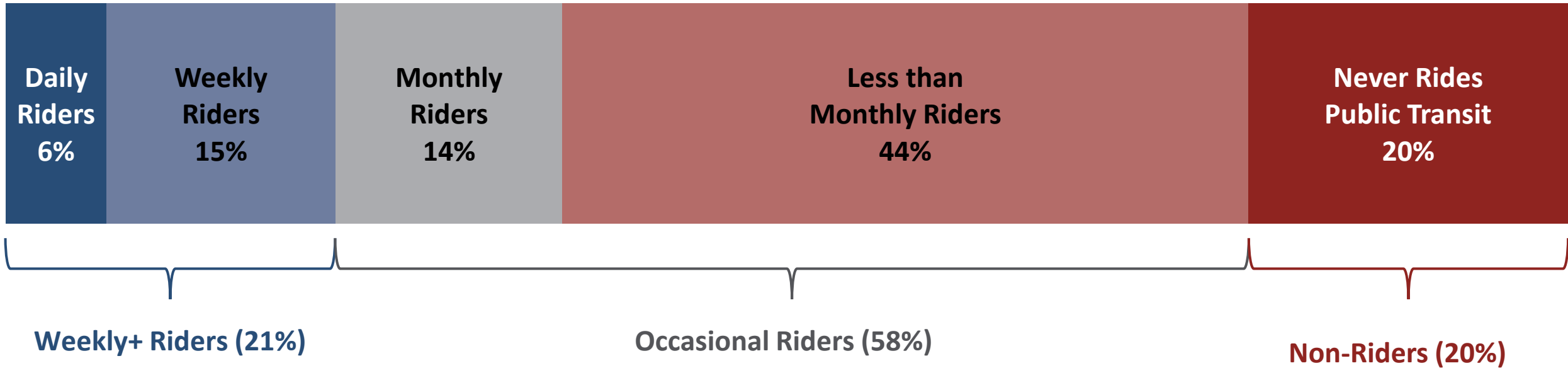


*Margin of error for each subgroup shown ranges from ±6.9 to 11.5 percentage points



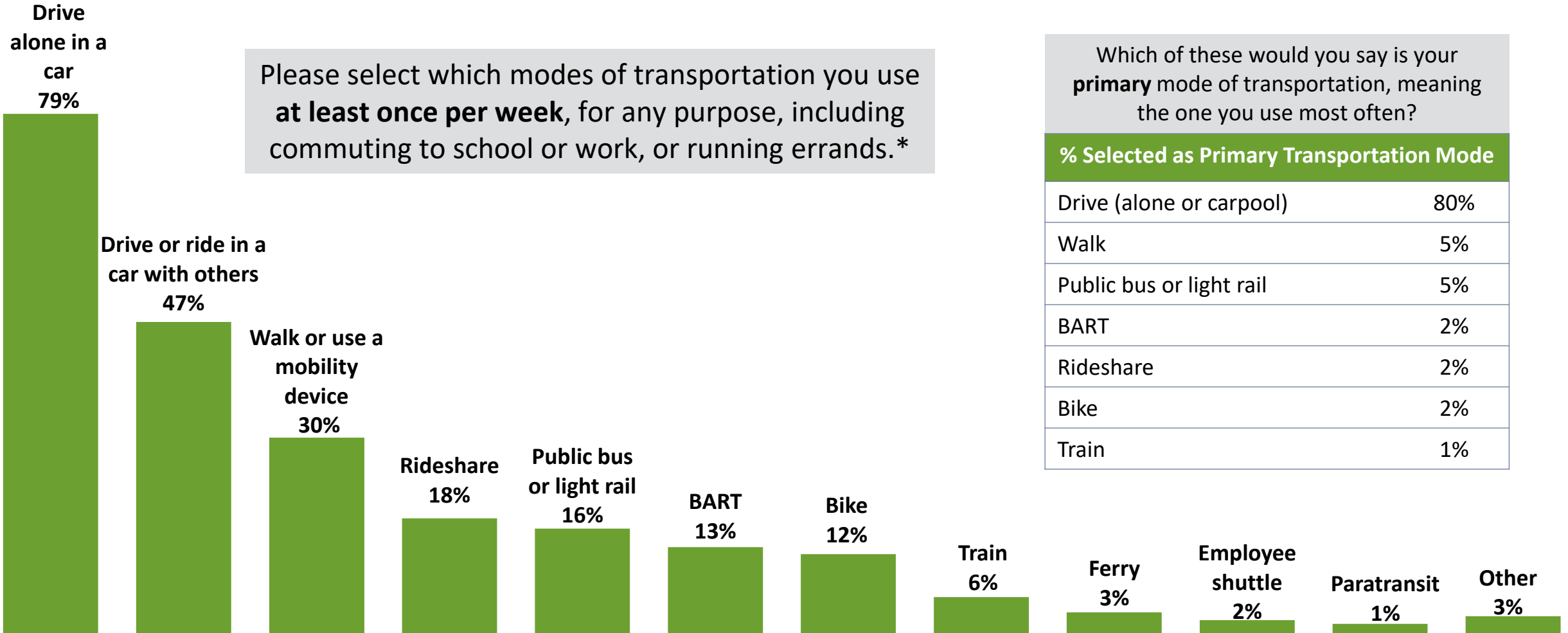
Transportation Usage
Self-reported

Current Public Transit Usage



Daily Riders: Rides any public transit service 5+ times a week
Weekly Riders: Rides any public transit service at least once a week
Monthly Riders: Rides any public transit service at least once a month
Less than Monthly Riders: Rides any public transit service less than monthly
Never Rides: Never rides on any public transit service

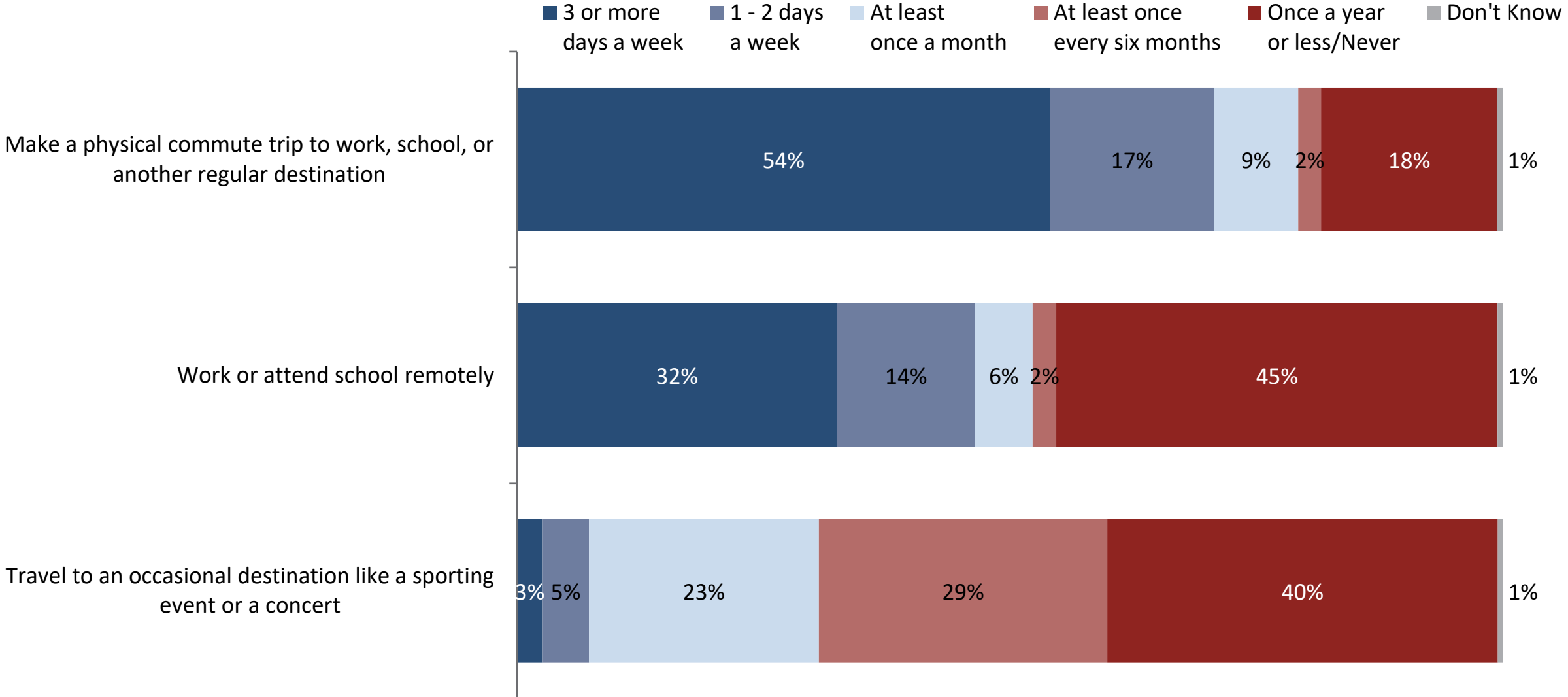
Modes of Transportation



Q56.

*Multiple responses accepted, percentages equal greater than 100%

Travel Frequency in Bay Area

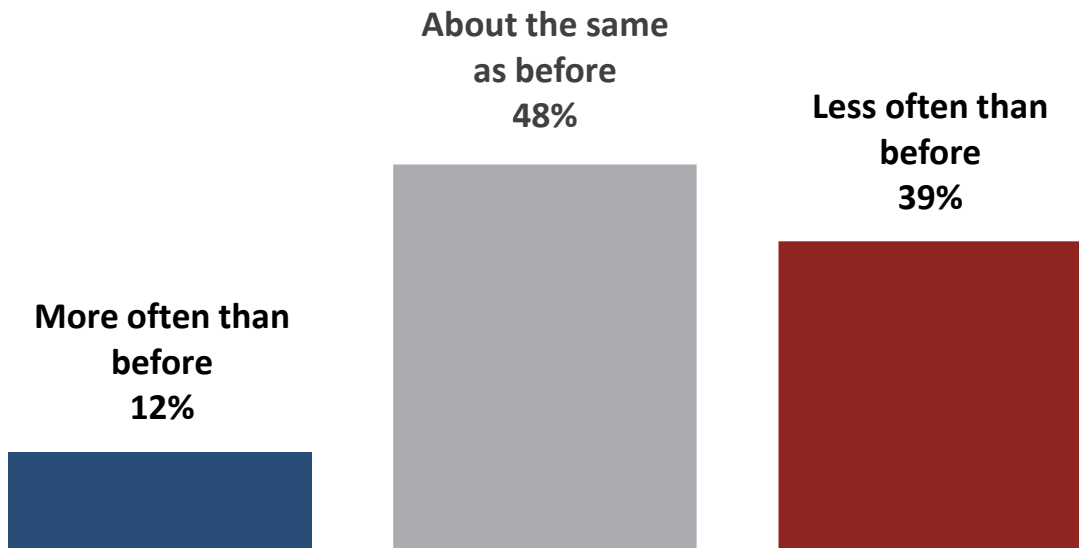


Q58-61. Please indicate how often you do each of the following, on average.

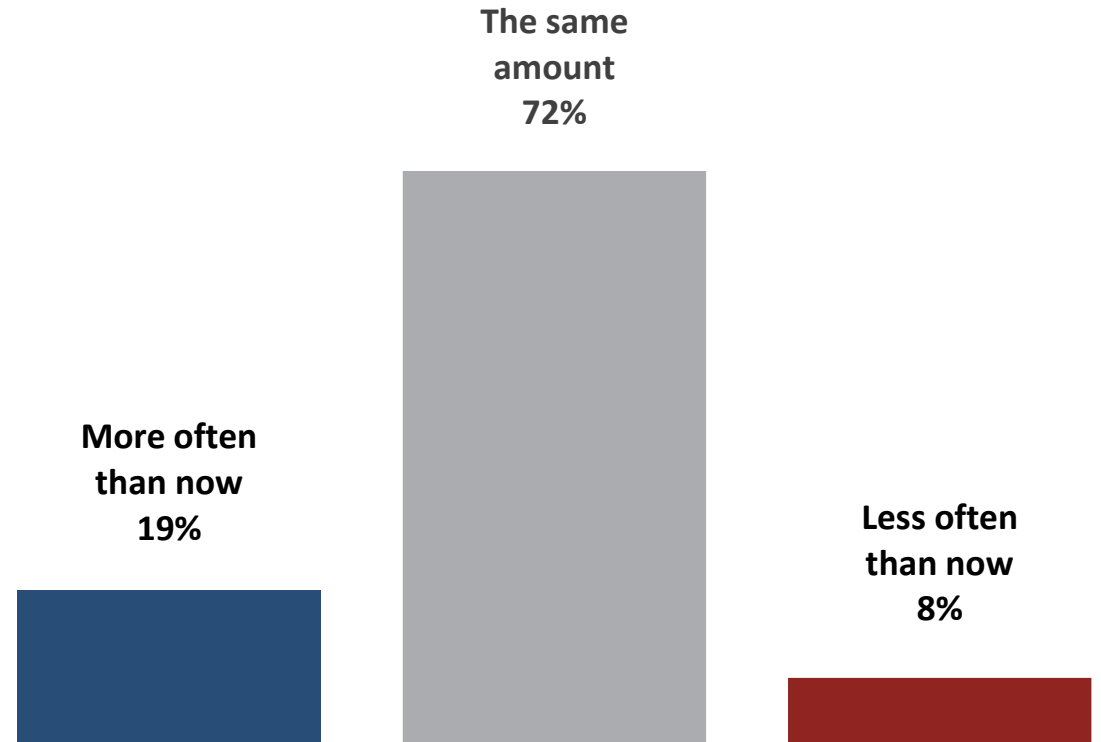
Commute trips change

More than one-third report commuting less frequently compared to pre-COVID. Most anticipate no change moving forward.

Compared to prior to the pandemic, are you currently making physical commute trips to work, school, or another regular destination...



And in the next few months, do you think you will make physical commute trips more often, less often, or about the same amount as you do now?



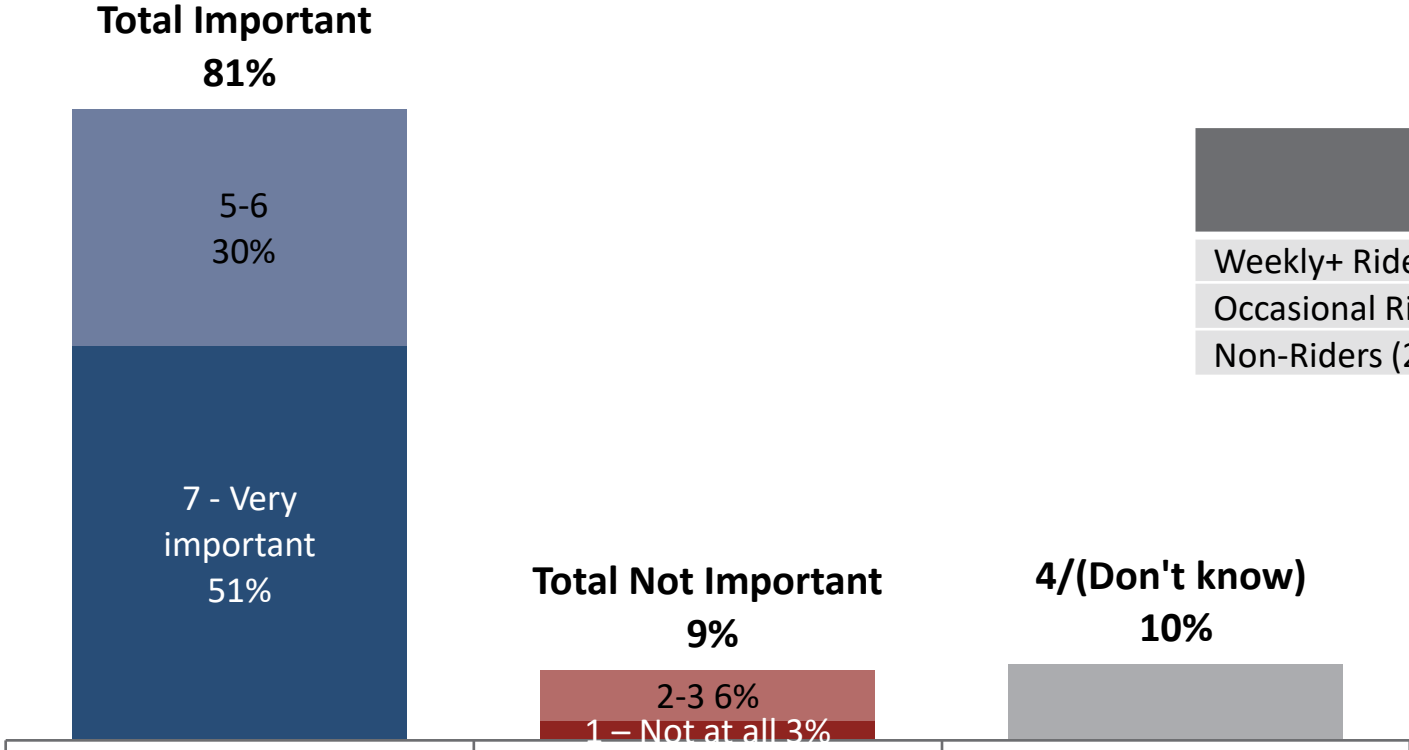


Transit Attitudes

Importance of Public Transit

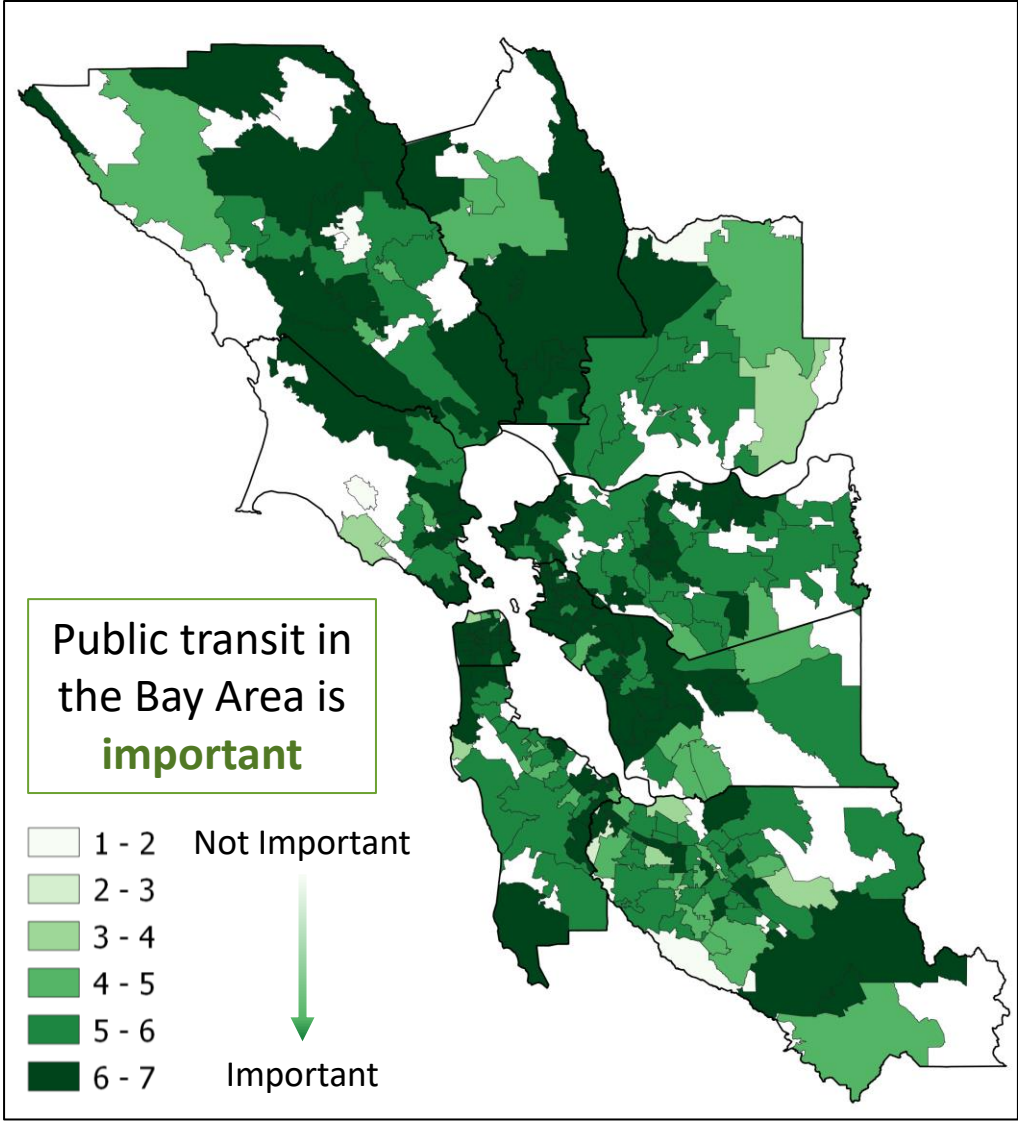
Although most don't use transit regularly, there is widespread belief that **public transit is important for the Bay Area.**

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



	7 - Very Important	5 - 6	Total Important	Total Not Important
Weekly+ Riders (21%)	71%	26%	96%	1%
Occasional Riders (58%)	48%	32%	80%	9%
Non-Riders (20%)	37%	32%	69%	17%

Transit Importance by Geography



Transit Investment Attitudes

We need to maintain the public transit service we have to make sure it is there for people who depend on it.

87%

Having high-quality, reliable public transit in the Bay Area benefits everyone, even people who don't ride it.

79%

We need to invest in real improvements to our public transit system to make it a better option for more people in the Bay Area instead of driving.

74%

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%

Having high-quality, reliable public transit in the Bay Area really only benefits those who ride it.

18%

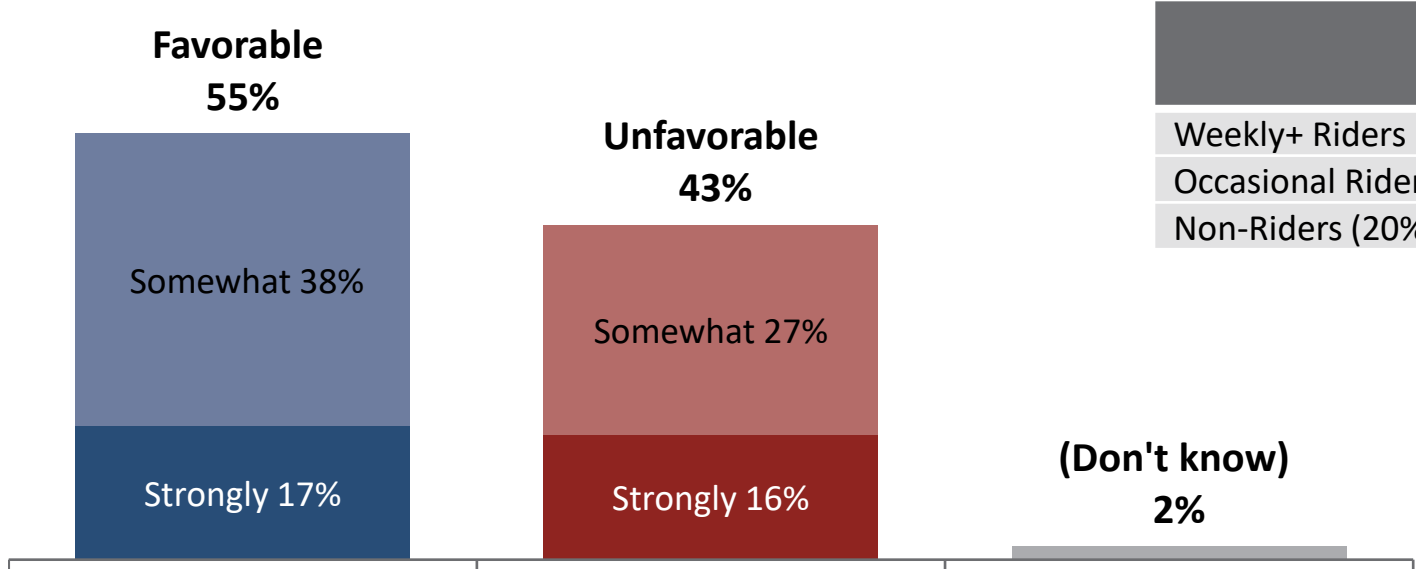
We should stop trying to improve a transit system that only a few residents use, and focus investments on other improvements that help people get around.

22%

Public Transit Favorability

Overall opinions of Bay Area public transit are mixed, but those who use it have generally positive opinions.

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?



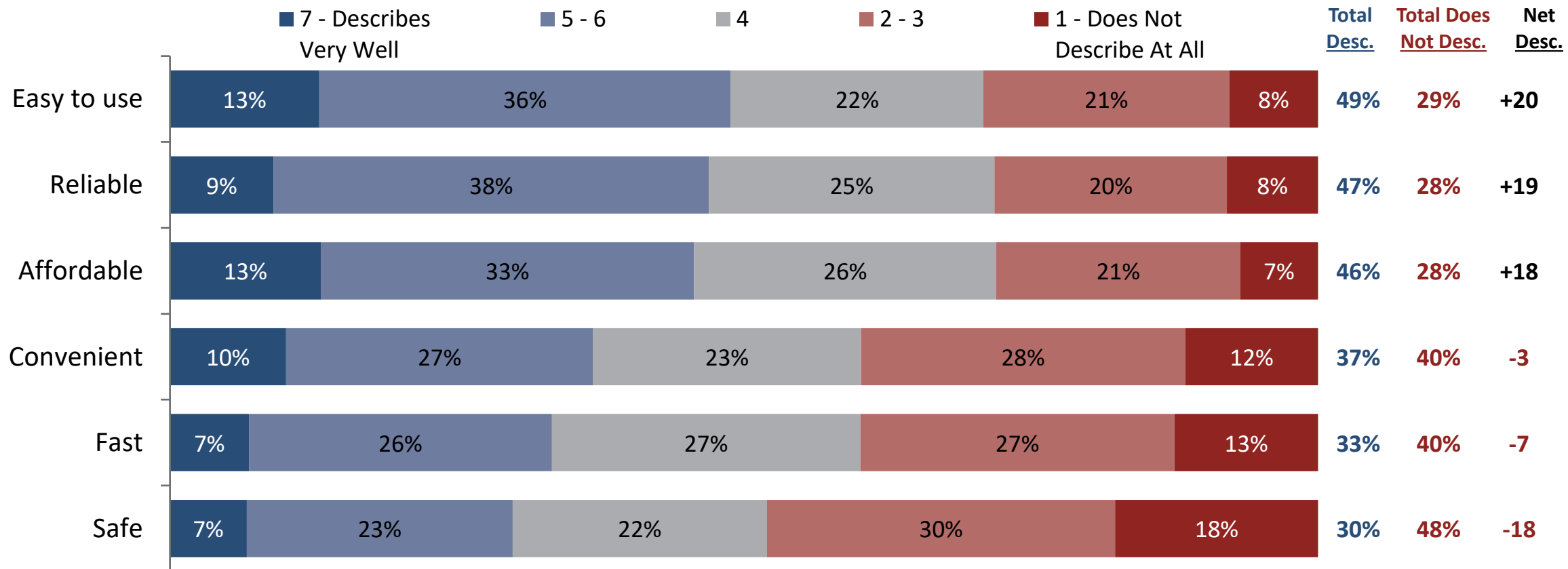
	Strongly Favorable	Somewhat Favorable	Total Favorable	Total Unfavorable
Weekly+ Riders (21%)	33%	40%	73%	26%
Occasional Riders (58%)	12%	40%	52%	47%
Non-Riders (20%)	15%	31%	46%	50%

Q20. 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?

Public Transit Attributes

Bay Area public transit receives net positive ratings on ease of use, reliability, and affordability.

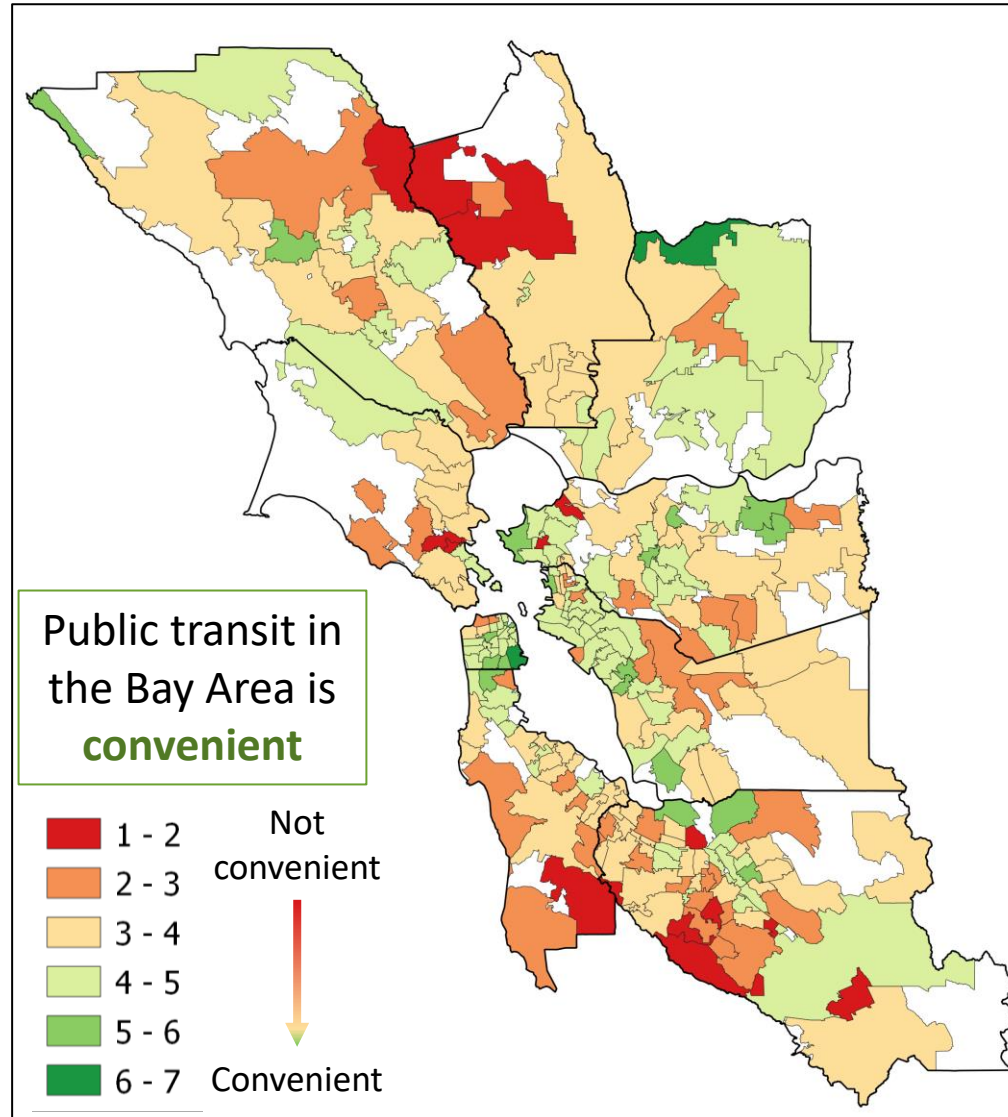
Now I'd like to ask you some more questions about public transit in the Bay Area – meaning BART, buses, Muni, Caltrain, light rail, and ferries.



Q22-27. How well do you feel each of the following describes public transit in the Bay Area?

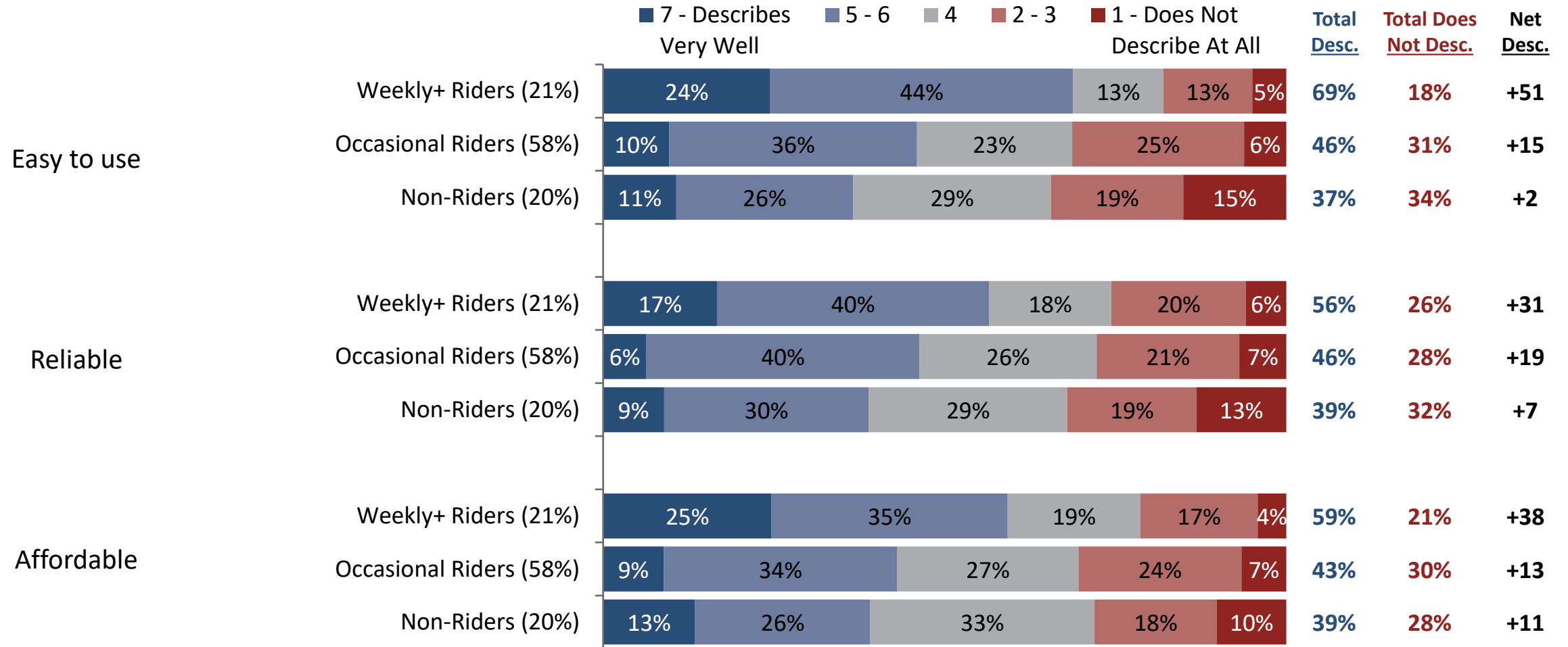
*Respondents answering “Don’t know” total less than 2% and are shown in the middle point (4).

Convenience by Geography



Q22/25. How well do you feel each of the following describes public transit in the Bay Area? Please use a scale from 1 to 7 where 1 means does not describe at all, and 7 means describes very well.

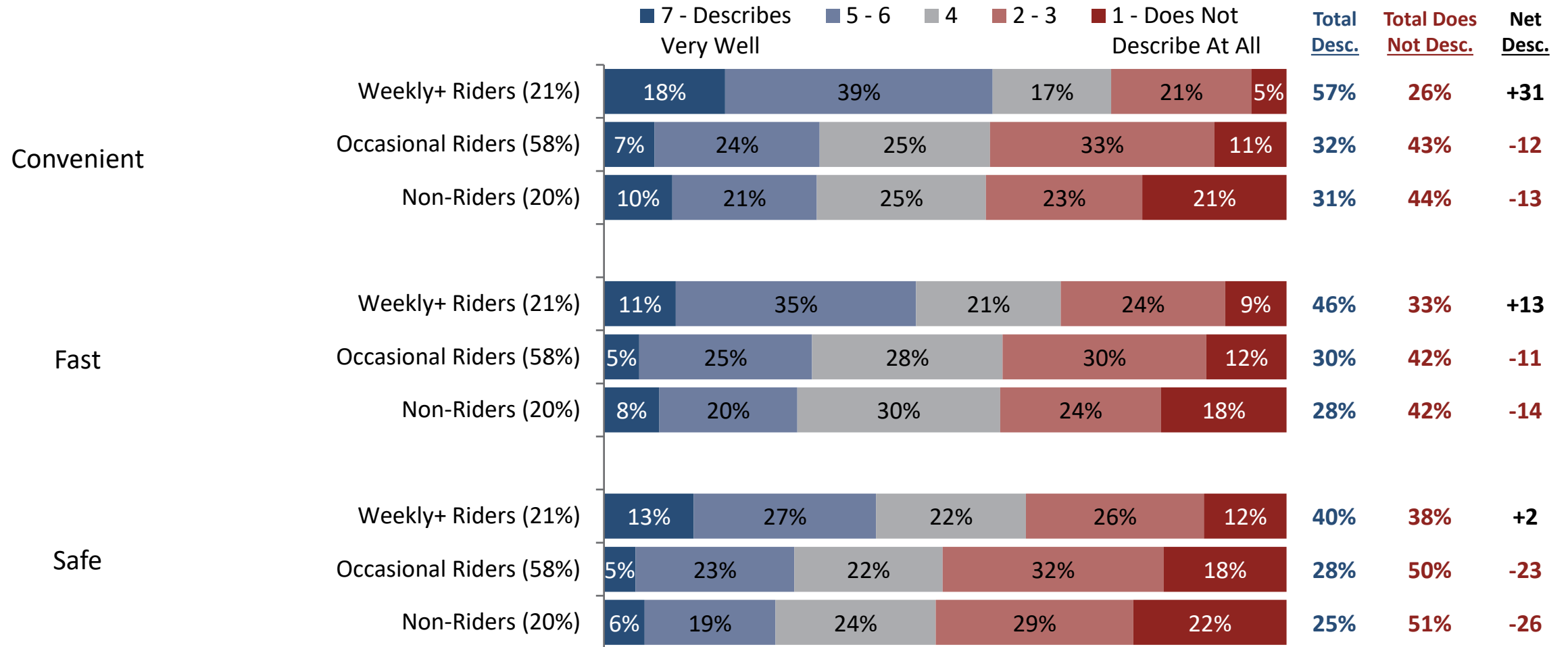
Transit Attributes by Ridership



Q22-27. How well do you feel each of the following describes public transit in the Bay Area?

*Respondents answering “Don’t know” total less than 3% and are shown in the middle point (4).

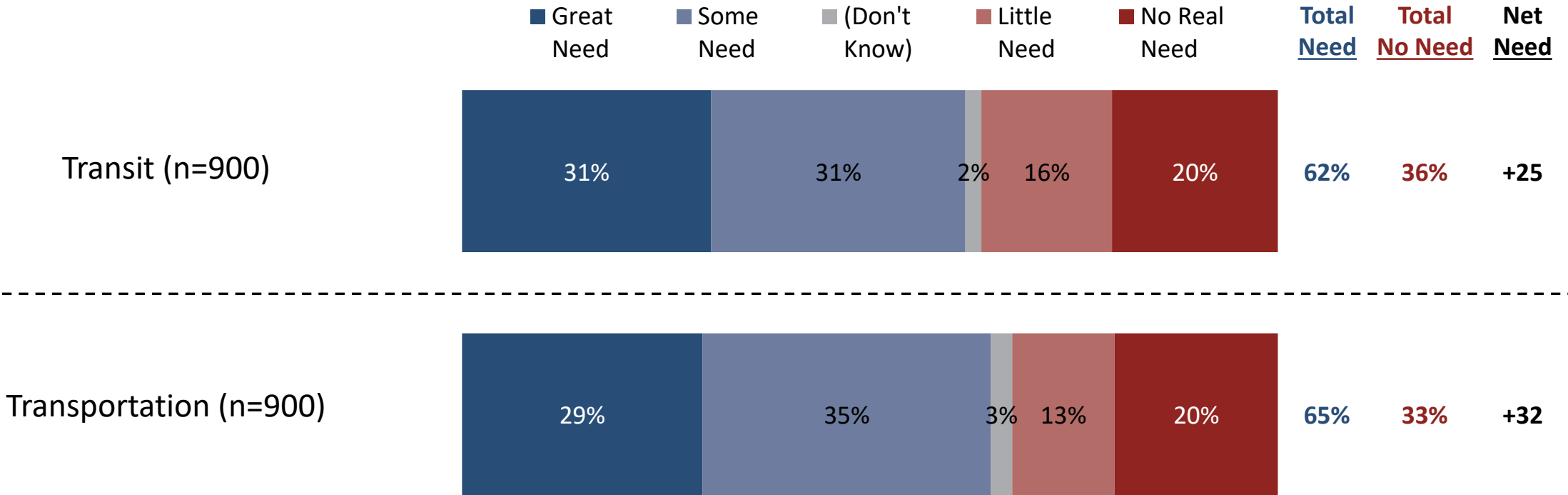
Transit Attributes by Ridership



Perception of Need

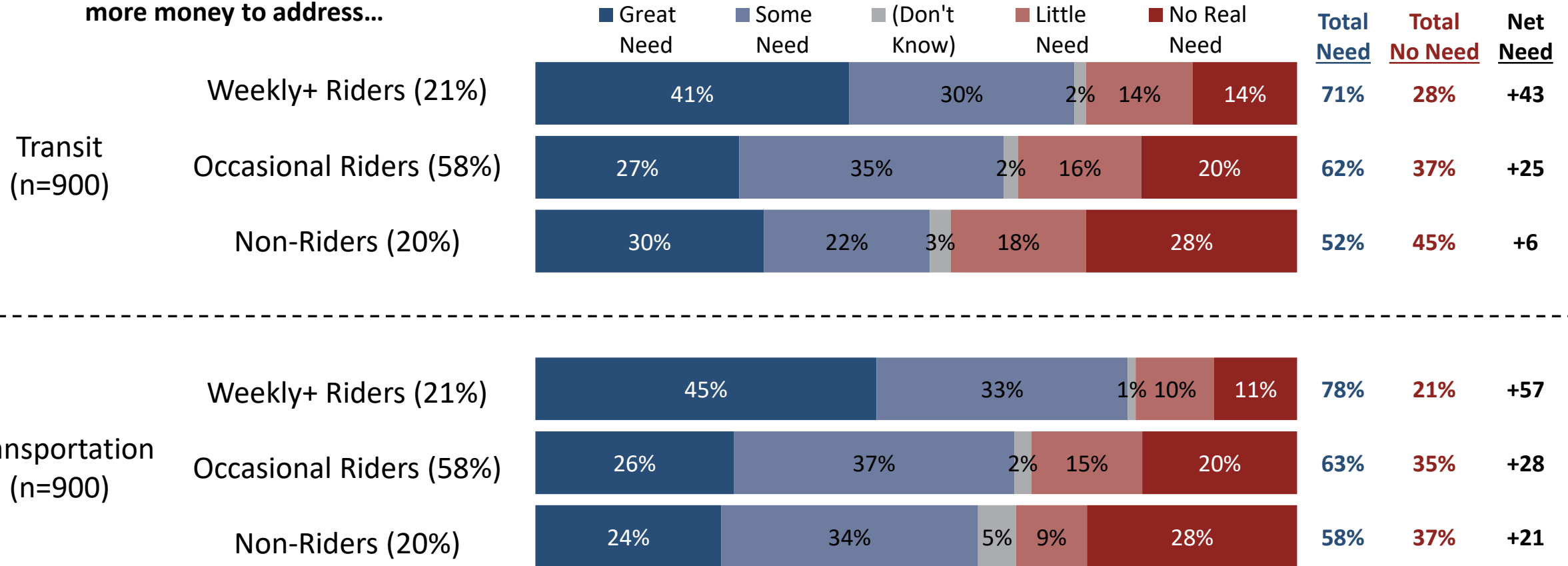
Just under two-thirds of voters see a need for additional funding to address transit/transportation

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...



Perception of Need by Ridership

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...



Q13. 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 [transit/transportation]?



Transportation: Moving Forward

Potential Transportation Tax

Both transportation measures have strong majority support, but fall short of two-thirds.

Transit Only

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? **(69 words)**

**Yes
59%**

**No
39%**

**(Undecided)
2%**

Transit + Transportation

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? **(70 words)**

**Yes
63%**

**No
36%**

**(Undecided)
1%**

Q15-16. If the election were held today, would you vote yes to approve or no to reject this measure?

*Sample size for each ballot question = 900n, with a margin of error of ±3.3 percentage points

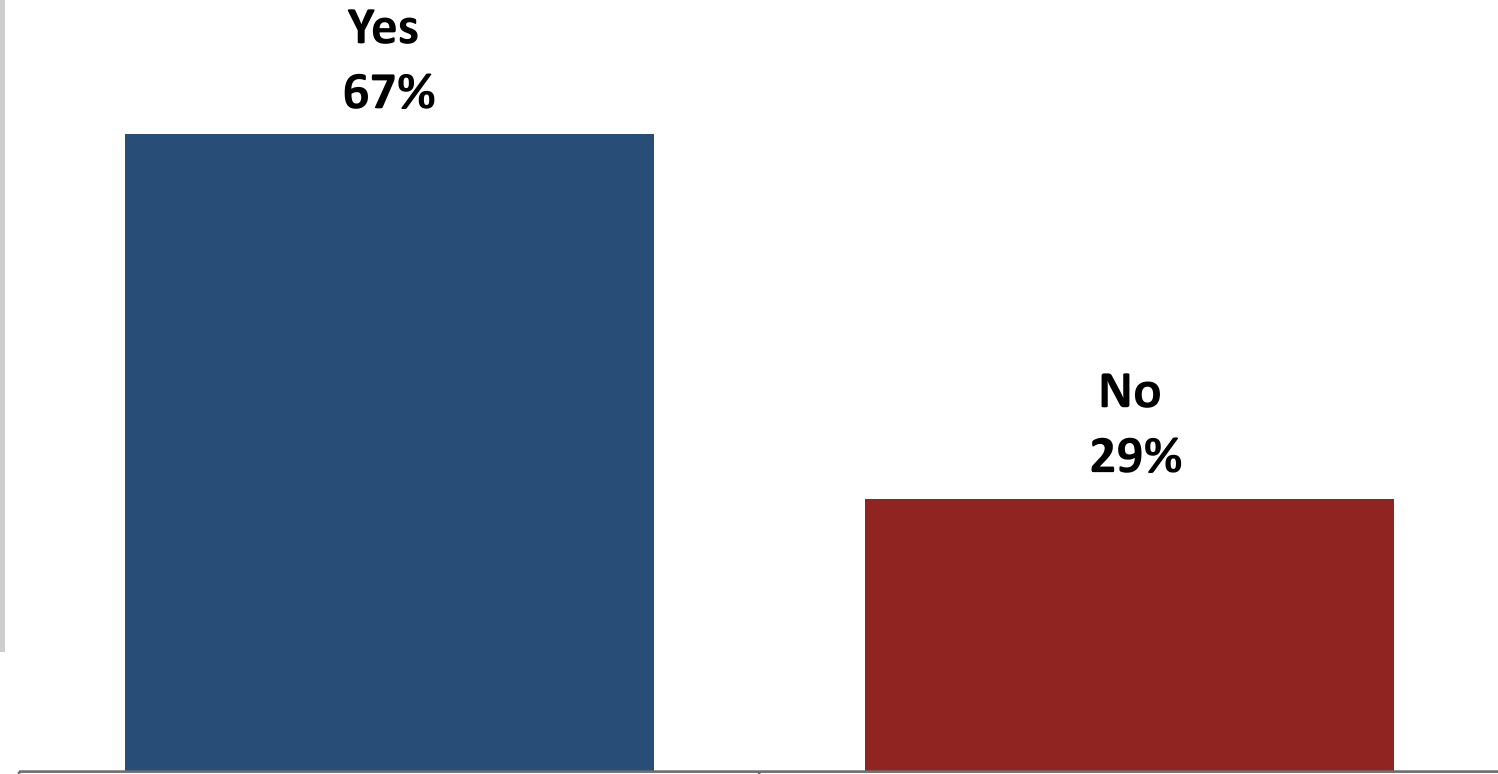
2019 FASTER Poll

Prior to the pandemic, support for a transportation sales tax reached two-thirds.

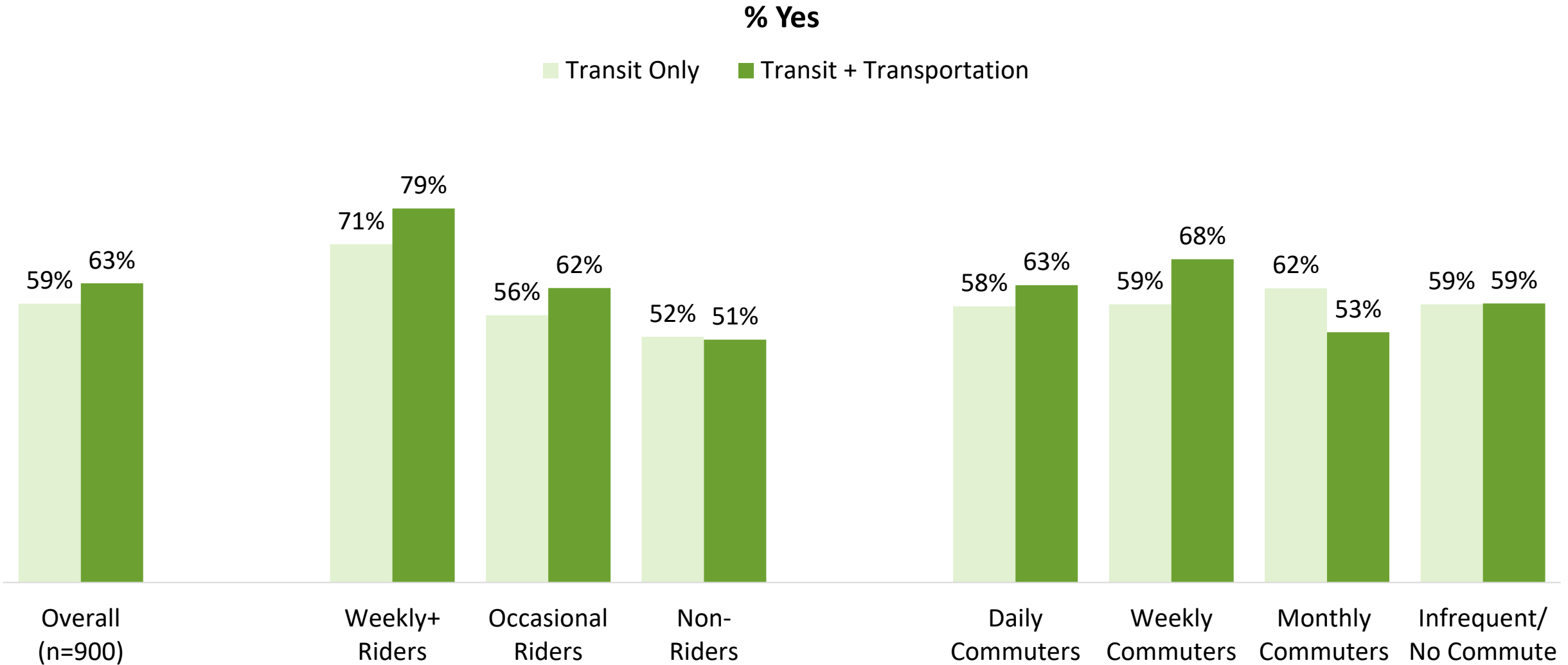
To reduce traffic congestion and make the Bay Area's transportation system more reliable, affordable, accessible, efficient and faster with:

- a rail network connecting major cities;*
- creating transit hubs around the region;*
- modernizing BART, trains, ferries, and buses to improve speed, safety and frequency;*

shall the measure enacting a 40 year one-cent sales tax, generating at least \$1,600,000,000 annually, with oversight and audits, be adopted?

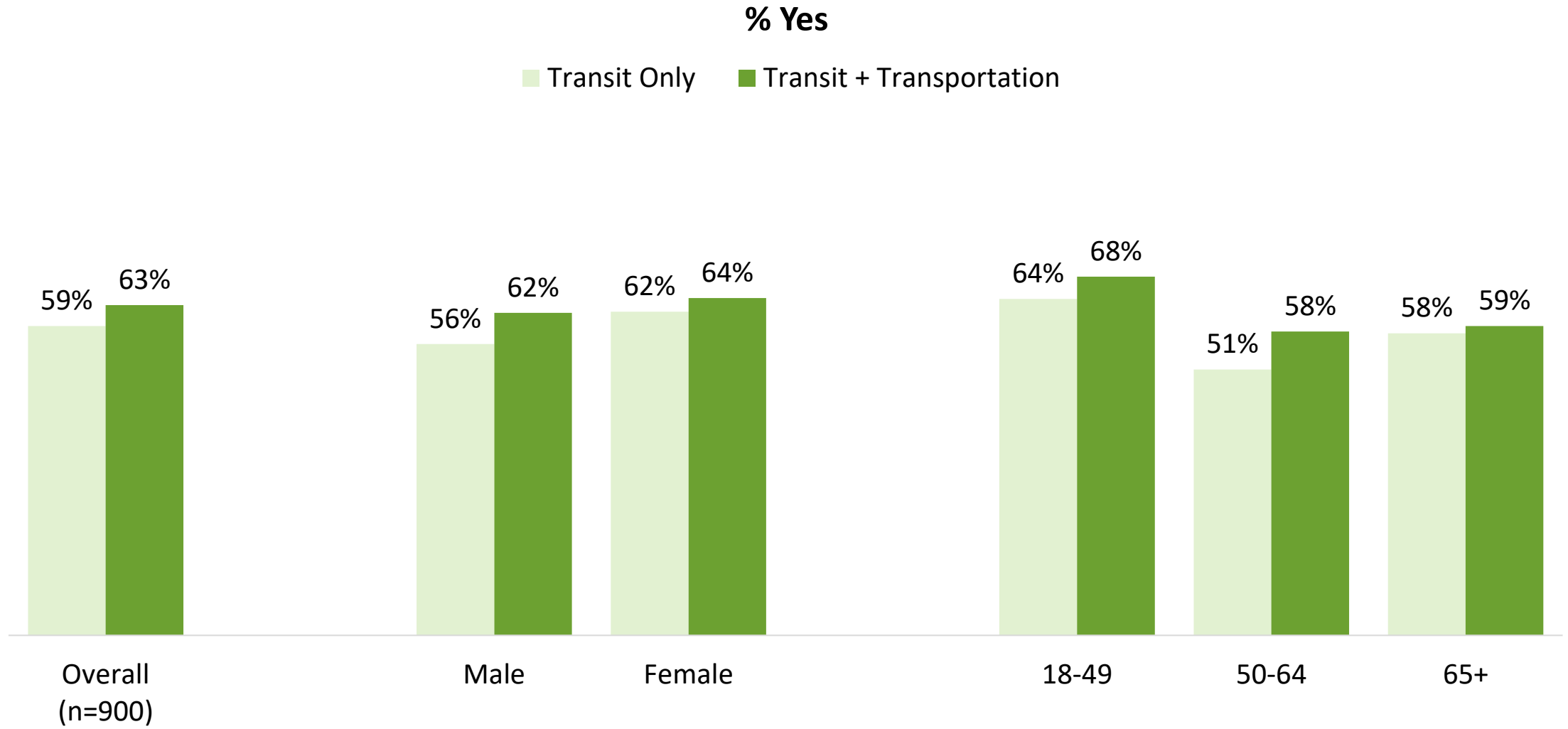


Measures by Ridership, Commute Frequency



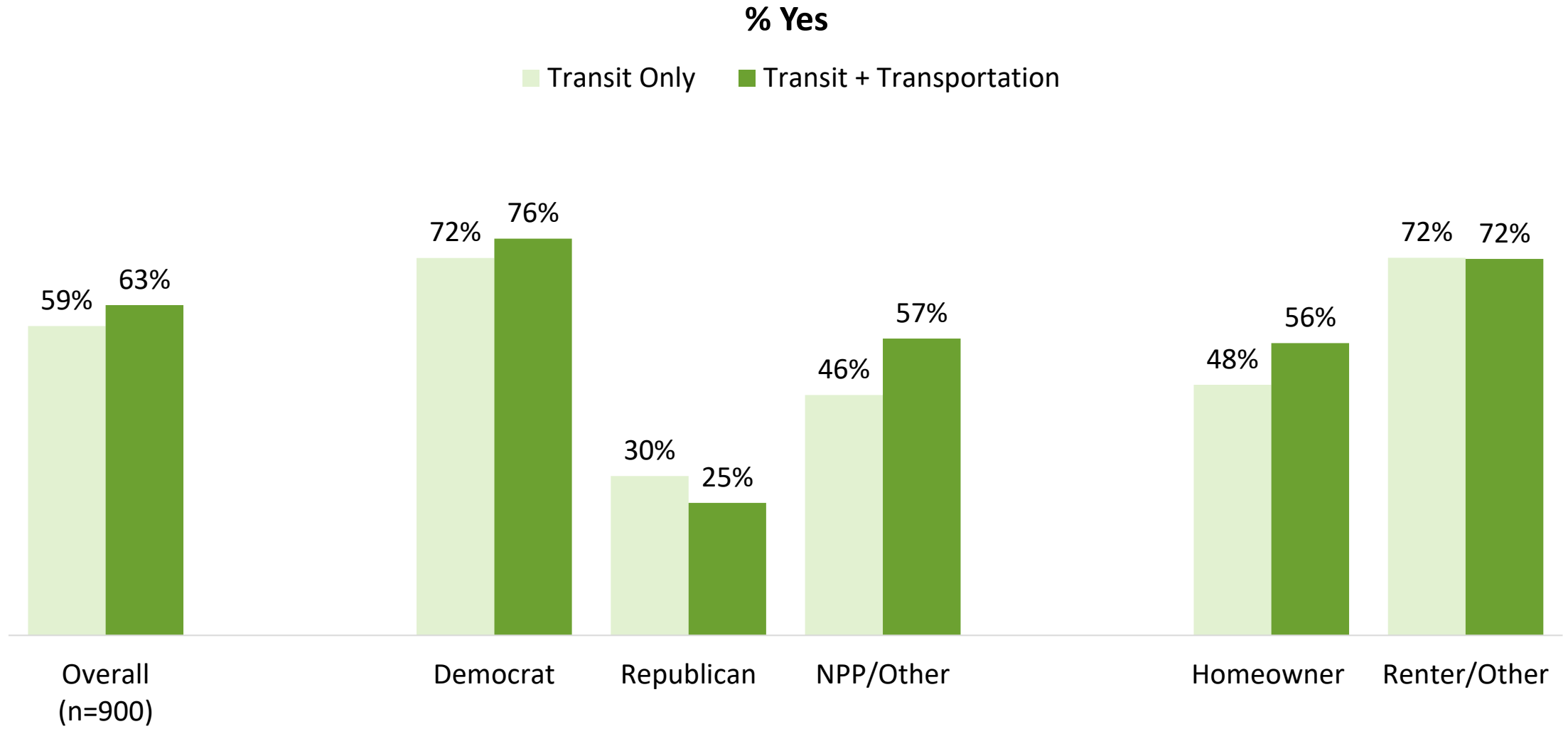
*Margin of error for each subgroup shown ranges from ±4.1 to 11.0 percentage points

Measures By Gender, Age



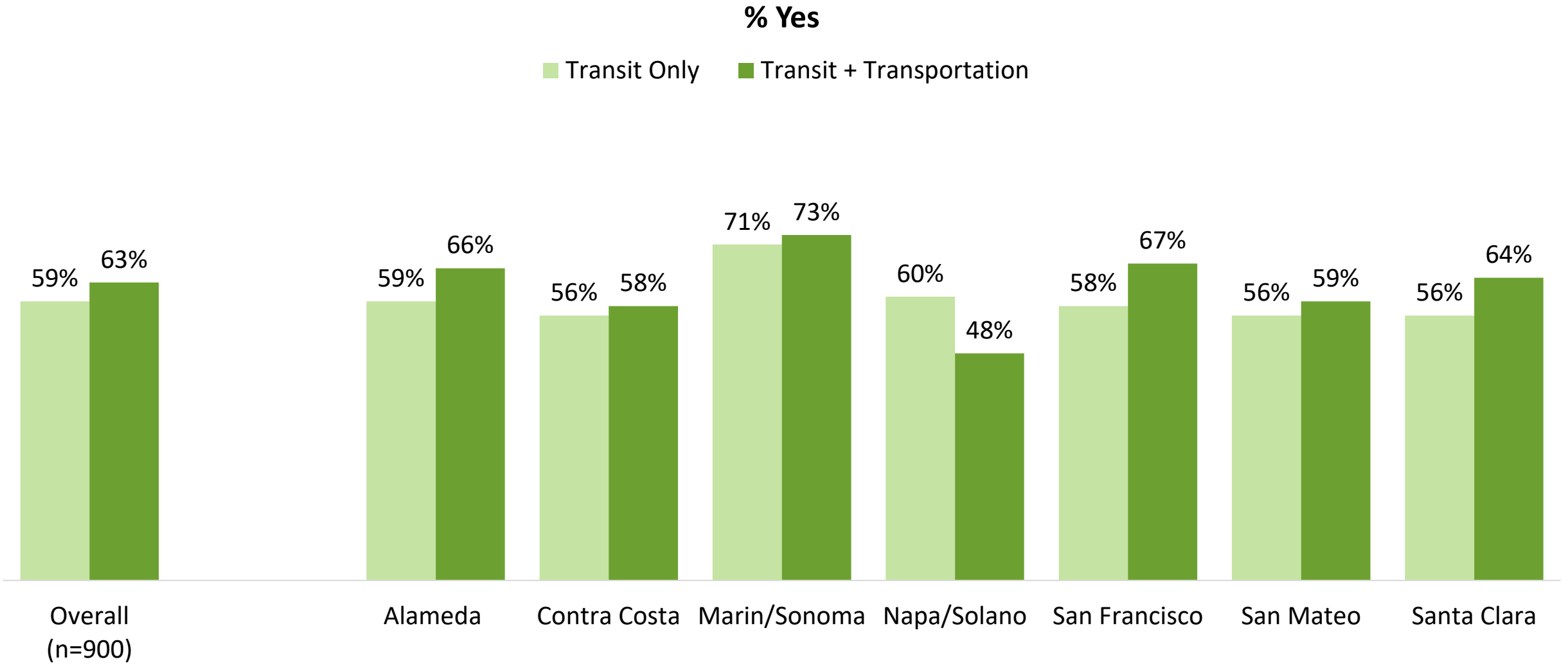
*Margin of error for each subgroup shown ranges from ±4.6 to 6.2 percentage points

Measures By Party, Homeownership



*Margin of error for each subgroup shown ranges from ±4.3 to 8.2 percentage points

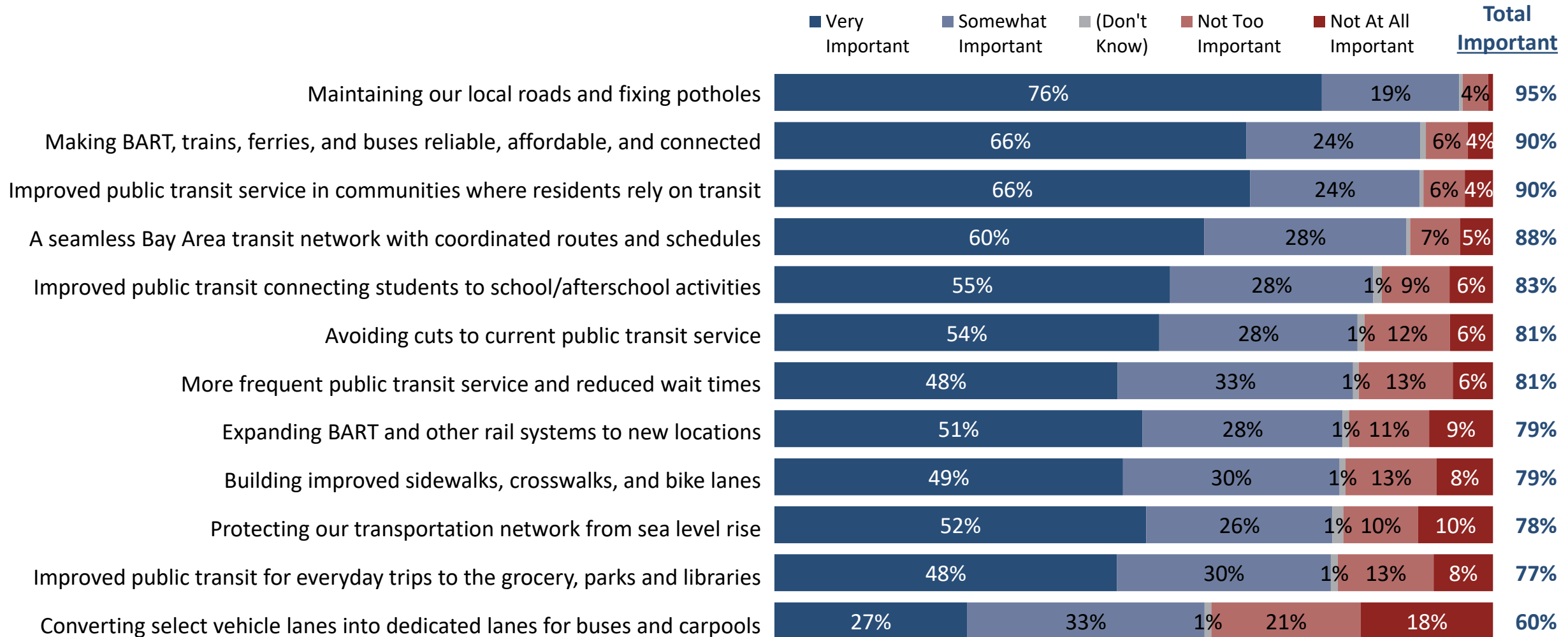
Measures By Region



*Margin of error for each subgroup shown ranges from ±6.9 to 11.5 percentage points

Transportation Investments

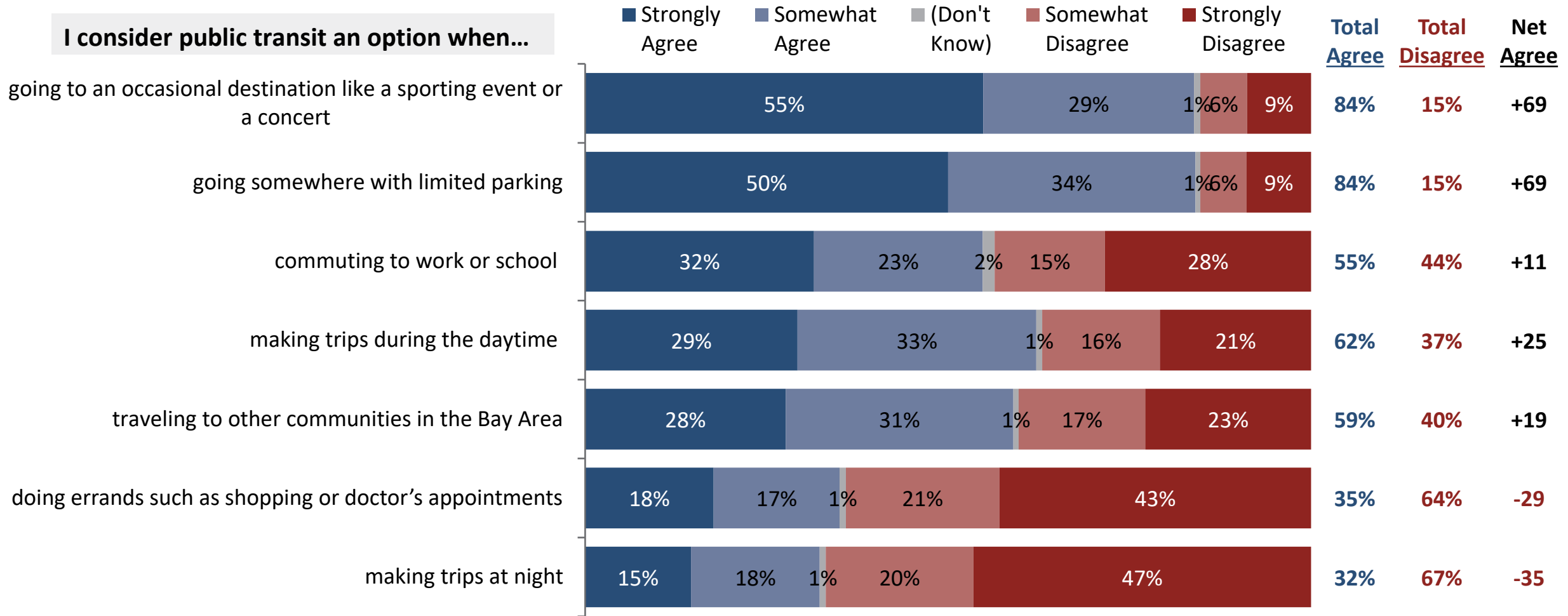
Voters are supportive of many of the transit improvements tested, but above all want roads to be maintained.



Q31-42. Now I'm going to read you some potential priorities for future transportation investments. After each one, please tell me if that is very important, somewhat important, not too important, or not at all important to you.

Public Transit Scenarios

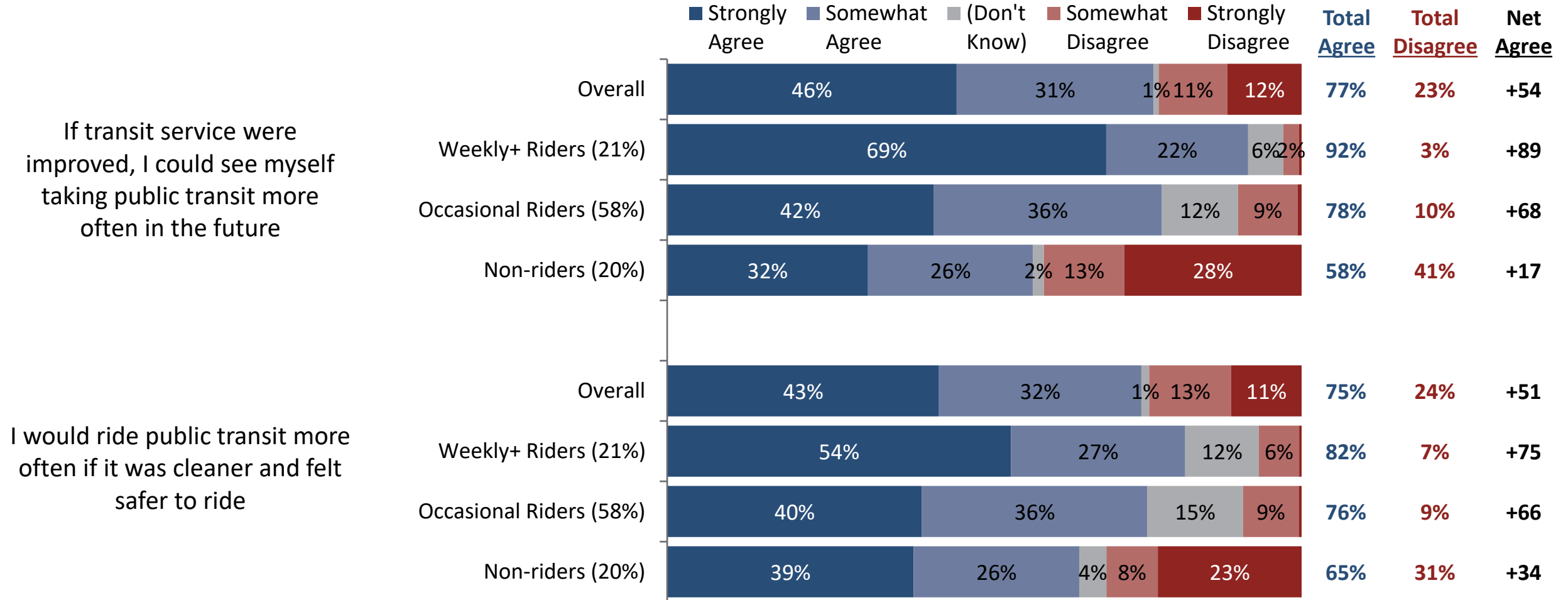
Most say they **consider** transit in many circumstances.



Q48-54. Even if you don't currently ride public transit, please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements.

Transit Usage

Most say that if transit was improved they would use it more frequently.

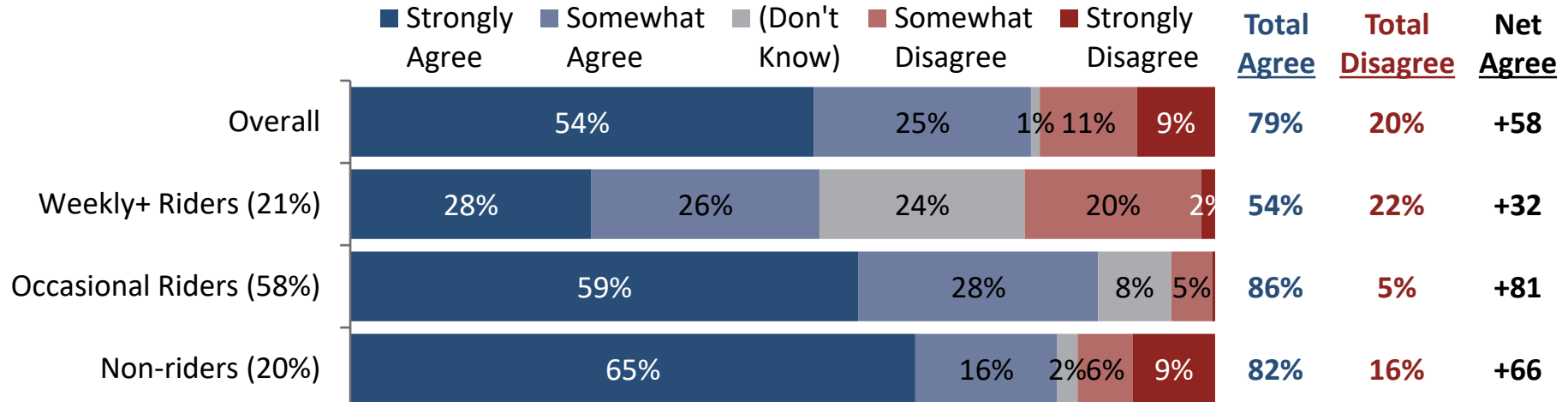


Q43-46. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.

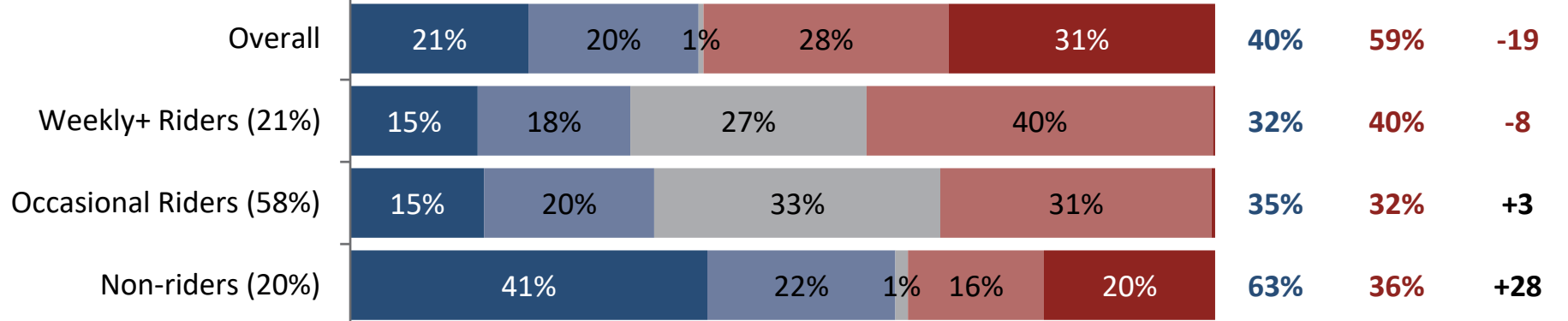
Transit Usage Hesitancy

Some non-riders are adamantly anti-transit for their own usage, but many are very open. Convenience is a significant factor.

Taking public transit is less convenient than driving for most of my transportation needs



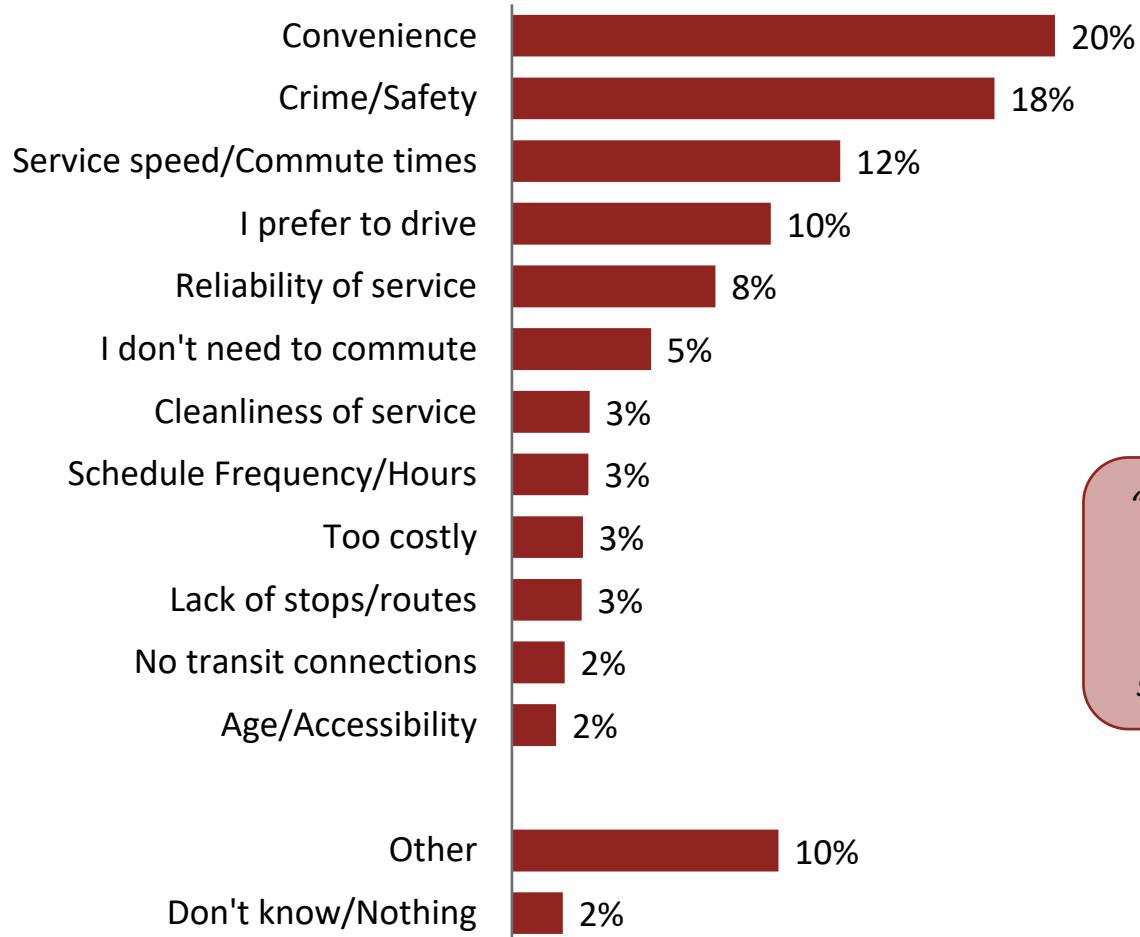
Nothing will make me want to take public transit more than I currently do



Q43-46. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.

Barriers to Public Transportation

Convenience, speed and safety are significant barriers for many to using transit.



"I have to walk out of my neighborhood to get to it and hope its on time and I could already be [at my destination] in the time it takes for all that."

"I have to drive my car to get to [public transportation]. It means that I could just drive since I'd already be in my car."

"It seems dangerous at night, not frequent enough bus service so can't go where I want to go unless I want to spend a lot of time waiting."

"Lack of safety especially at night. As a mid-30s woman it's really hard to feel confident and comfortable taking the bus anytime"

"Usually it takes longer or just as long as driving."



Appendix

Subgroup Margin of Error

- ▶ Survey conducted March 14-23, 2023 with a total of 1,800 interviews with voters in the Bay Area.
- ▶ The results carry a Bay Area-wide margin of error ± 2.31 percentage points at the 95% confidence interval.

Region	Total Sample		Split Sample	
	Interviews (unweighted)	Margin of Error	Interviews (unweighted)	Margin of Error
Bay Area	1,800	± 2.3 pct pts	900	± 3.2 pct pts
Alameda County	372	± 5.1 pct pts	186	± 7.2 pct pts
Contra Costa County	311	± 5.6 pct pts	156	± 7.8 pct pts
Marin/Sonoma Counties	199	± 6.9 pct pts	100	± 9.8 pct pts
Napa/Solano Counties	146	± 8.1 pct pts	73	± 11.5 pct pts
San Francisco	175	± 7.4 pct pts	88	± 10.4 pct pts
San Mateo County	195	± 7.0 pct pts	98	± 9.9 pct pts
Santa Clara County	402	± 4.9 pct pts	201	± 6.9 pct pts

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