



**Survey of Likely November 2020 Voters
Regarding a Potential Sales Tax
for Caltrain
June 2020**

- ▶ Multimodal email-to-web and telephone survey of likely November 2020 voters in the Peninsula Corridor Counties (San Francisco, San Mateo, Santa Clara)
- ▶ Survey conducted June 11 – June 18, 2020
- ▶ 1255 interviews; overall margin of error ± 2.76 percentage points
 - Approximately 400 interviews in each county; margin of error ± 4.9 percentage points per county
 - Final data weighted to reflect actual voter population distribution.
- ▶ Interviews were conducted in English, Spanish, Chinese, and Vietnamese by trained, professional interviewers; landlines and mobile phones included
- ▶ Where applicable, results compared with:
 - Multi-modal email-to-web and telephone survey of Likely 2020 voters
 - Conducted March 25 – April 1, 2019
 - 1416 interviews; overall margin of error ± 2.6

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

Context and Timing

- ▶ Conducted during weeks 12 and 13 of the Coronavirus Shelter-in-Place period.
- ▶ Many workplaces remain closed; over 100,000 people had died from the pandemic nationally, and millions have filed for unemployment.
- ▶ During this time the area has seen low use of transit and less traffic, but both are beginning to rise.
- ▶ Leading up to and during the fielding period, there were national demonstrations around racial justice following the death of George Floyd in Minneapolis.

Key Findings

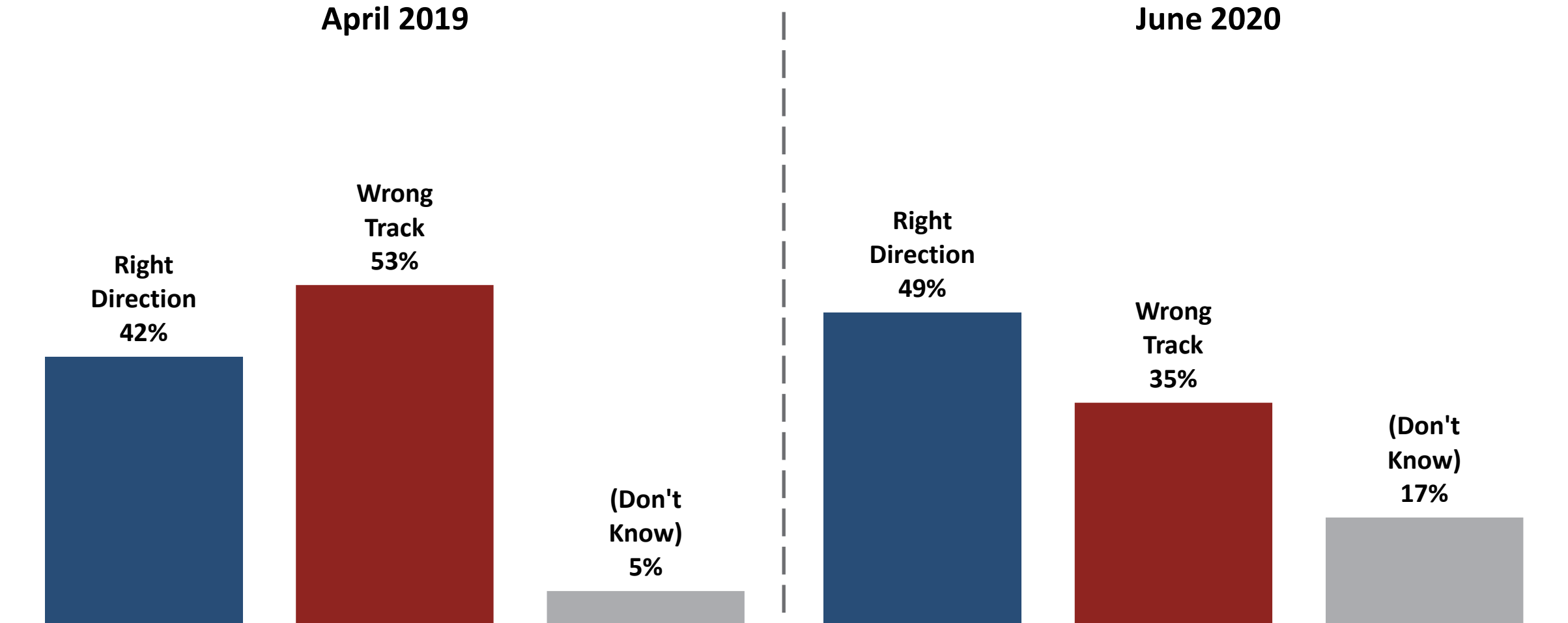
- ▶ Voters in the region value Caltrain as a regional service that helps relieve traffic and improve travel along the Peninsula, even for those who do not ride.
- ▶ Most who were riding Caltrain prior to the pandemic anticipate returning to their old ridership habits in the future.
- ▶ Even so, at 63% solid yes in the initial vote, a one-eighth cent sales tax measure for Caltrain does not currently have the two-thirds support needed to pass.
- ▶ Additional information about the measure's components and benefits is effective at increasing support to 70%, but negative messaging is extremely effective as well, dropping support to just 57%.



Issue Environment

Right Direction/Wrong Track Over Time

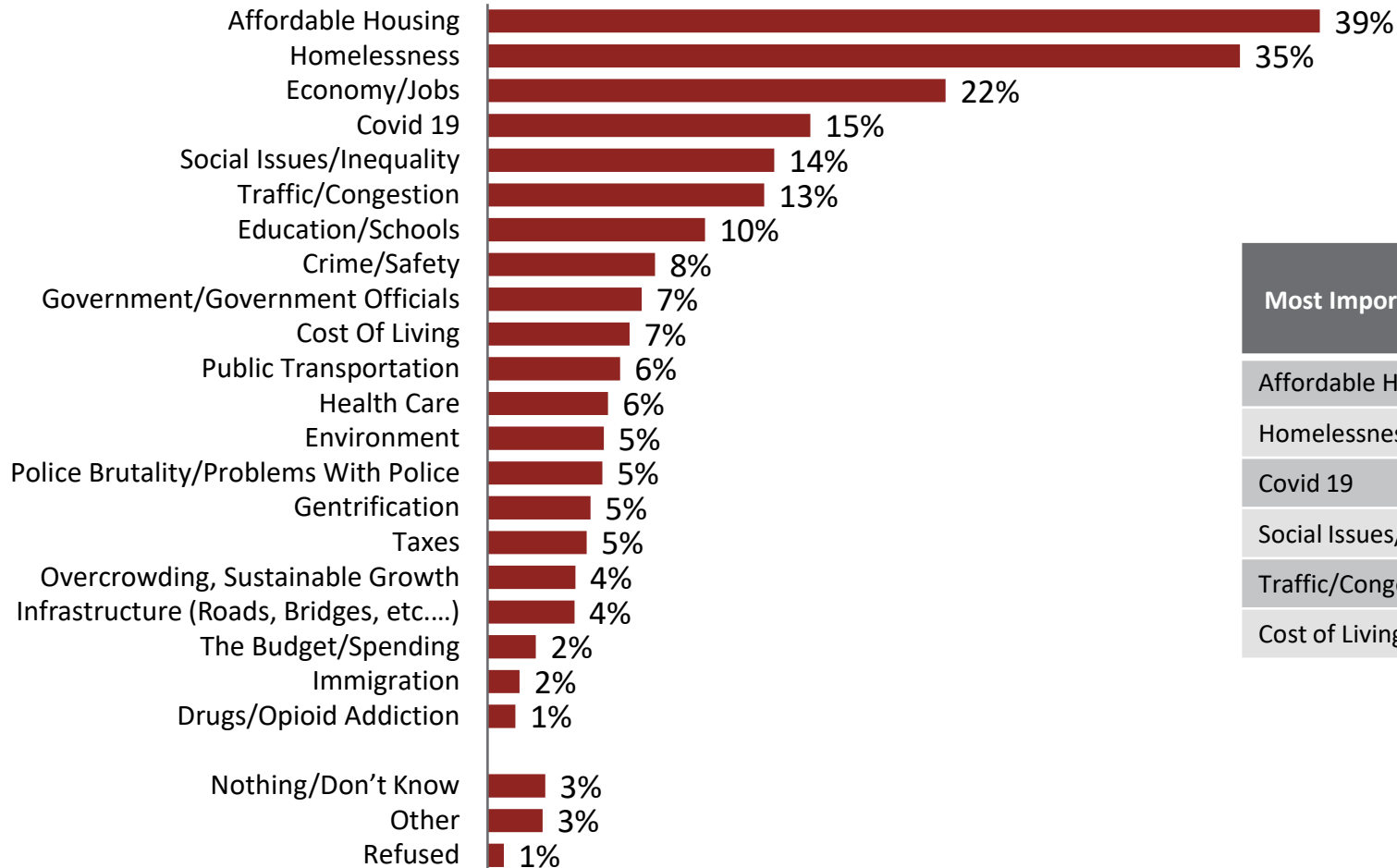
Optimism has risen since 2019.



Q4. 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?

Most Important Problems

Despite current events, housing and homelessness remains top of mind issues.



Most Important Problem	2019	2020 (First Response Only)
Affordable Housing	38%	22%
Homelessness	14%	18%
Covid 19	-	11%
Social Issues/Inequality	2%	5%
Traffic/Congestion	10%	4%
Cost of Living	7%	3%

Q5. What do you think are the most important problems facing the Bay Area today? (MULTIPLE RESPONSE)

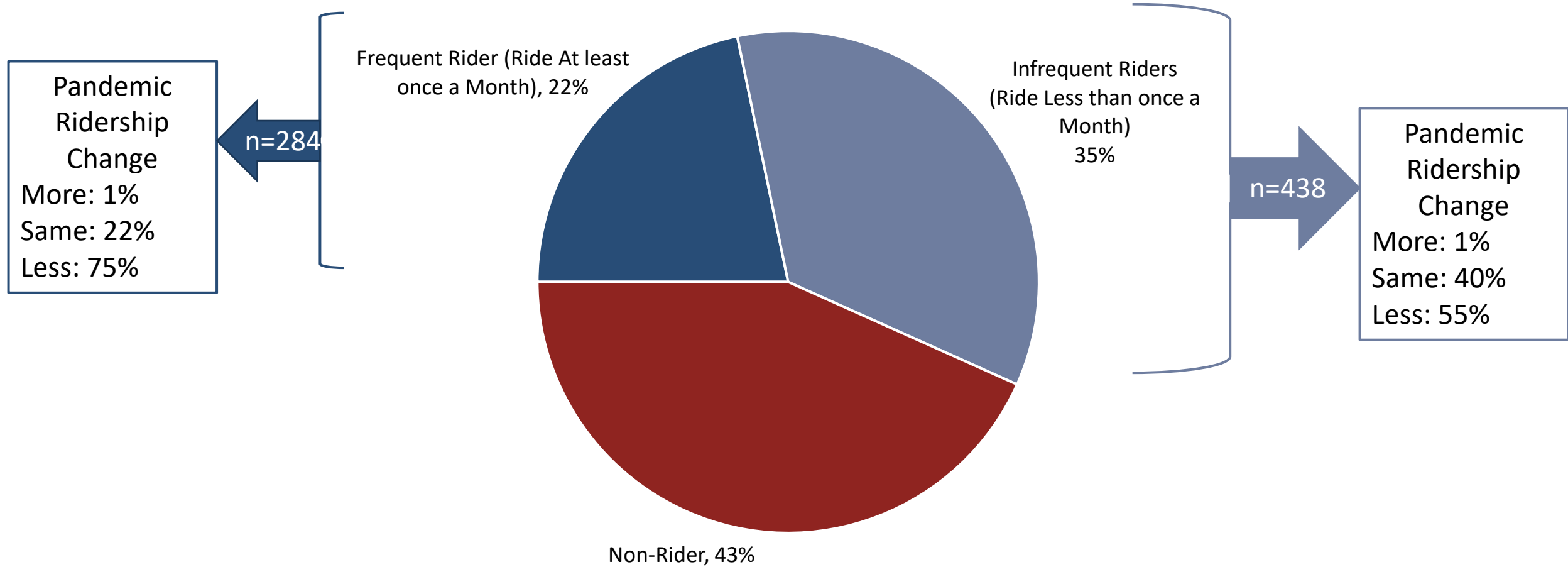
*2019 allowed only one response



Transportation Behavior

Caltrain Ridership

Almost three-quarters of frequent riders have decreased usage.



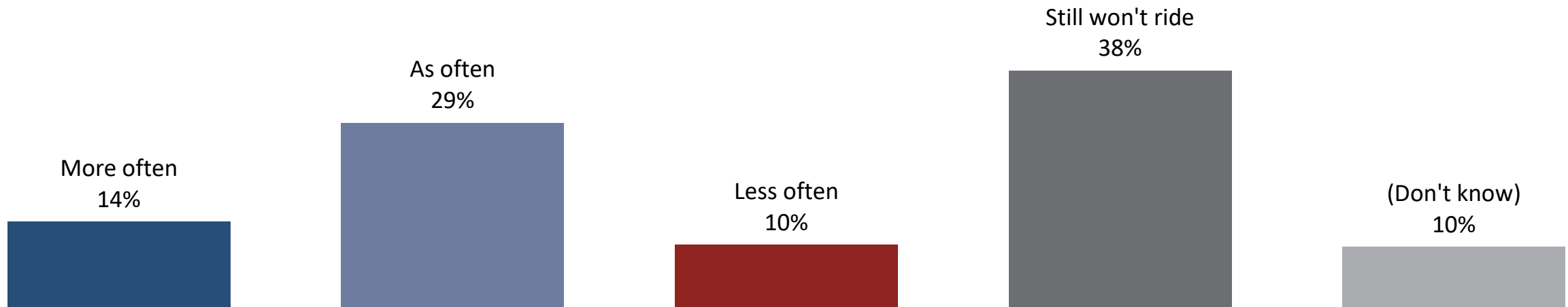
Q27. Prior to the Pandemic and shelter in place, how often did you ride Caltrain?

Q28. Now thinking about the last week or so, would you say that you are riding Caltrain less than you were before the Pandemic, about the same as before the Pandemic, or more than you were before the Pandemic?

Future Caltrain Usage

One in ten voters feel they will ride Caltrain less often post-pandemic, while four in ten say they will ride as often as they used to, if not more.

Thinking about when the Pandemic is behind us, do you think that you will ride Caltrain about as often as you did before the pandemic, less often than before, or more often than before?

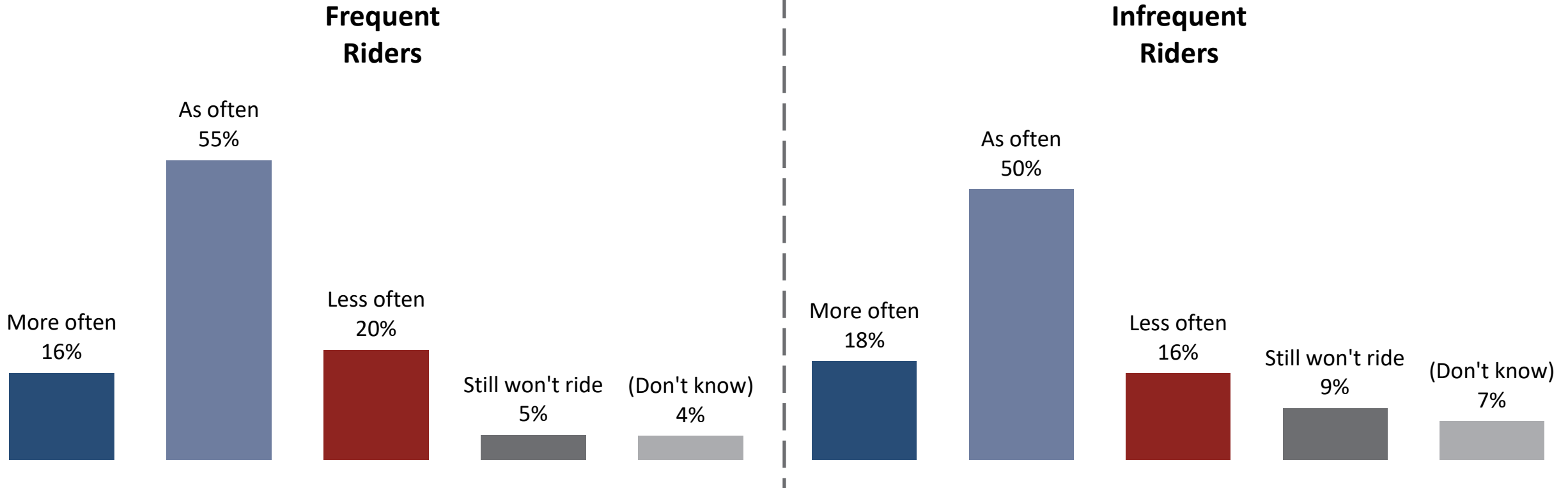


Q29. Thinking about when the Pandemic is behind us, do you think that you will ride Caltrain about as often as you did before the pandemic, less often than before, or more often than before?

Future Caltrain Usage by Past Caltrain Ridership

Seven in ten Caltrain riders believe they will ride Caltrain as much post-pandemic, if not more, with little difference between frequent and infrequent riders..

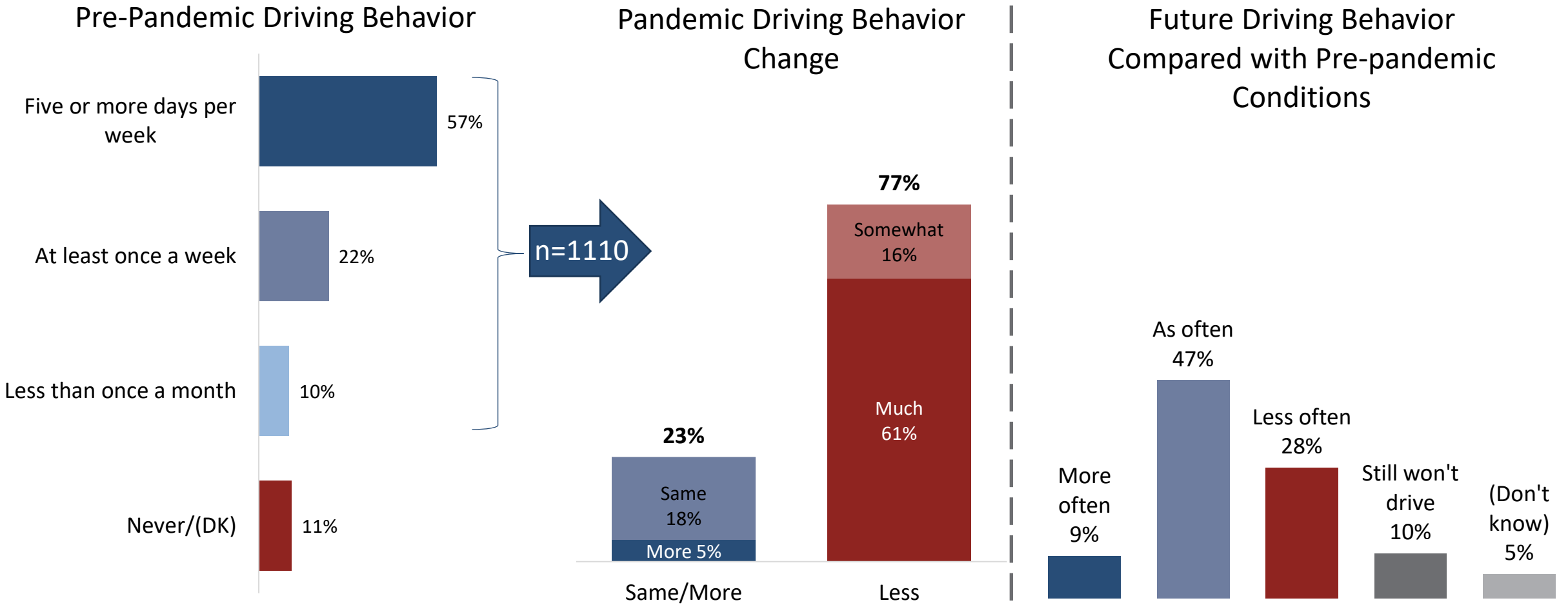
Thinking about when the Pandemic is behind us, do you think that you will ride Caltrain about as often as you did before the pandemic, less often than before, or more often than before?



Q29. Thinking about when the Pandemic is behind us, do you think that you will ride Caltrain about as often as you did before the pandemic, less often than before, or more often than before?

COVID-19 Driving Behavior

Self-reported current driving is down significantly, and while most think they will be back to normal after the pandemic, more than one quarter think they will drive less often.



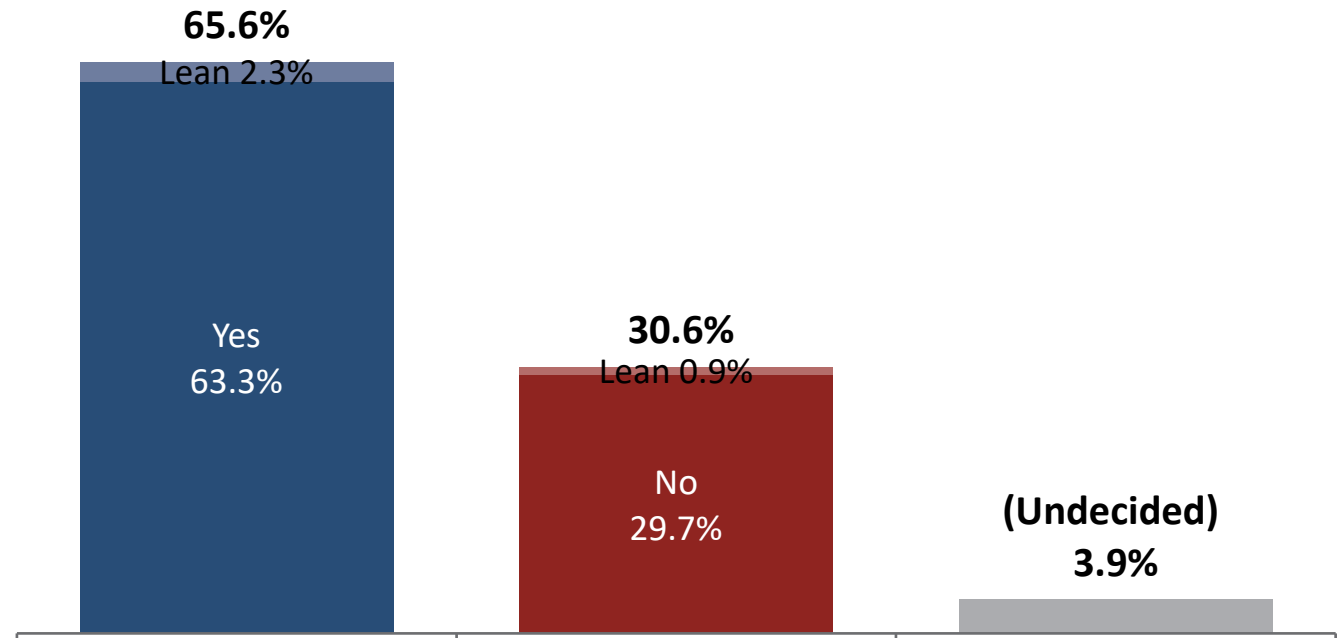


Revenue Measure

Initial Vote

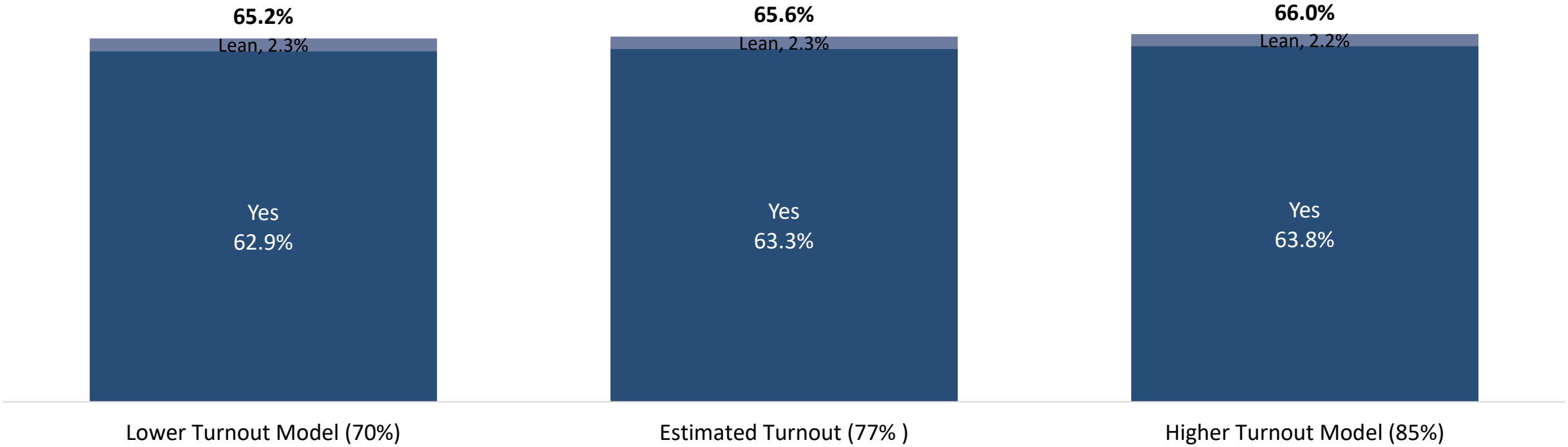
Support for a measure does not quite reach two thirds, even with those that are undecided and lean towards voting yes

To preserve Caltrain service and support regional economic recovery, prevent traffic congestion, make Caltrain more affordable and accessible, reduce air pollution with cleaner and quieter electric trains, make travel times faster, and increase Caltrain frequency and capacity between Santa Clara, San Mateo and San Francisco counties, shall the Peninsula Corridor Joint Powers Board's ordinance levying a 30-year one-eighth cent sales tax with oversight and audits, providing approximately \$100 million annually for Caltrain that the State cannot take away, be adopted?



Revenue Measure Feasibility Based on Different Turnouts

Higher turnout would likely bring out more Yes voters, but not necessarily enough to make a significant difference.

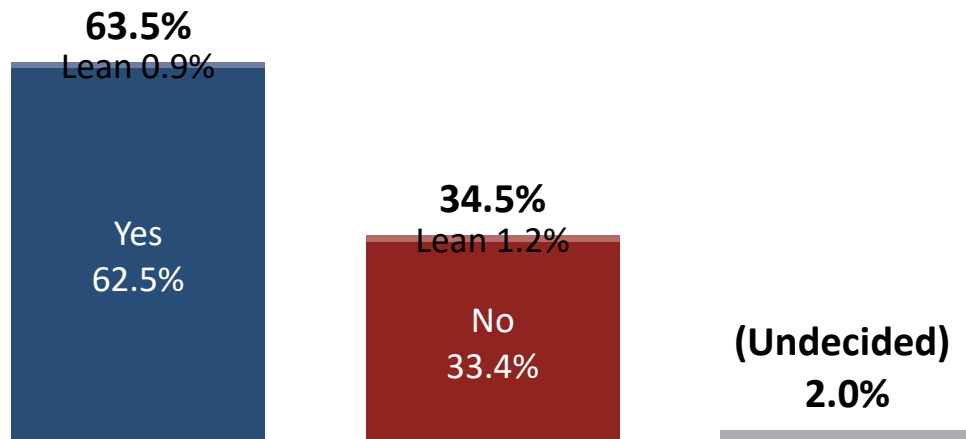


Initial Vote Comparison

Although the environment has changed since a year ago, and an updated ballot question was used, support remains fairly consistent.

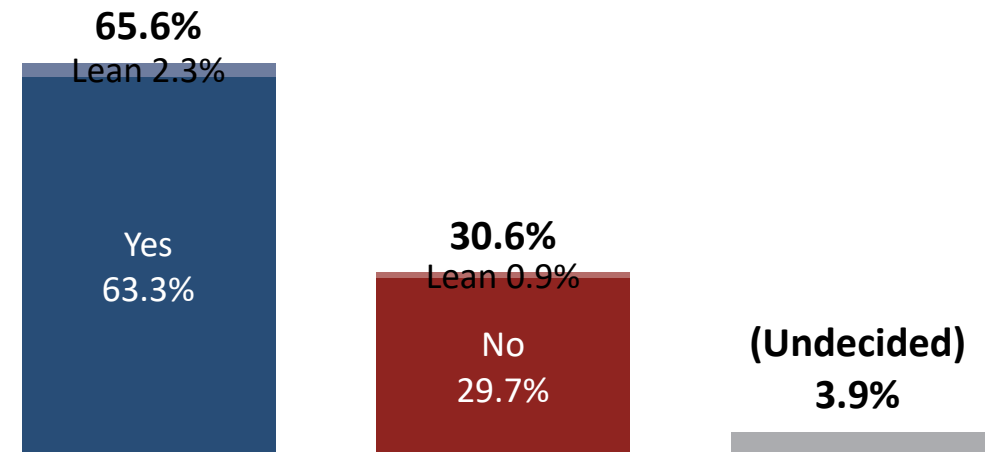
2019 Ballot Question (n=713)

To ease traffic on Highways 101, I-280, and the El Camino Real corridors and reduce air pollution by continuing to convert Caltrain rail service to run on cleaner, quieter electricity rather than diesel fuel, and increasing Caltrain frequency and capacity between Santa Clara, San Mateo and San Francisco counties, shall the Peninsula Corridor Joint Powers Board's ordinance levying a 30-year 1/8 cent sales tax with independent citizen oversight, providing approximately \$100 million annually for Caltrain that the State cannot take away, be adopted?



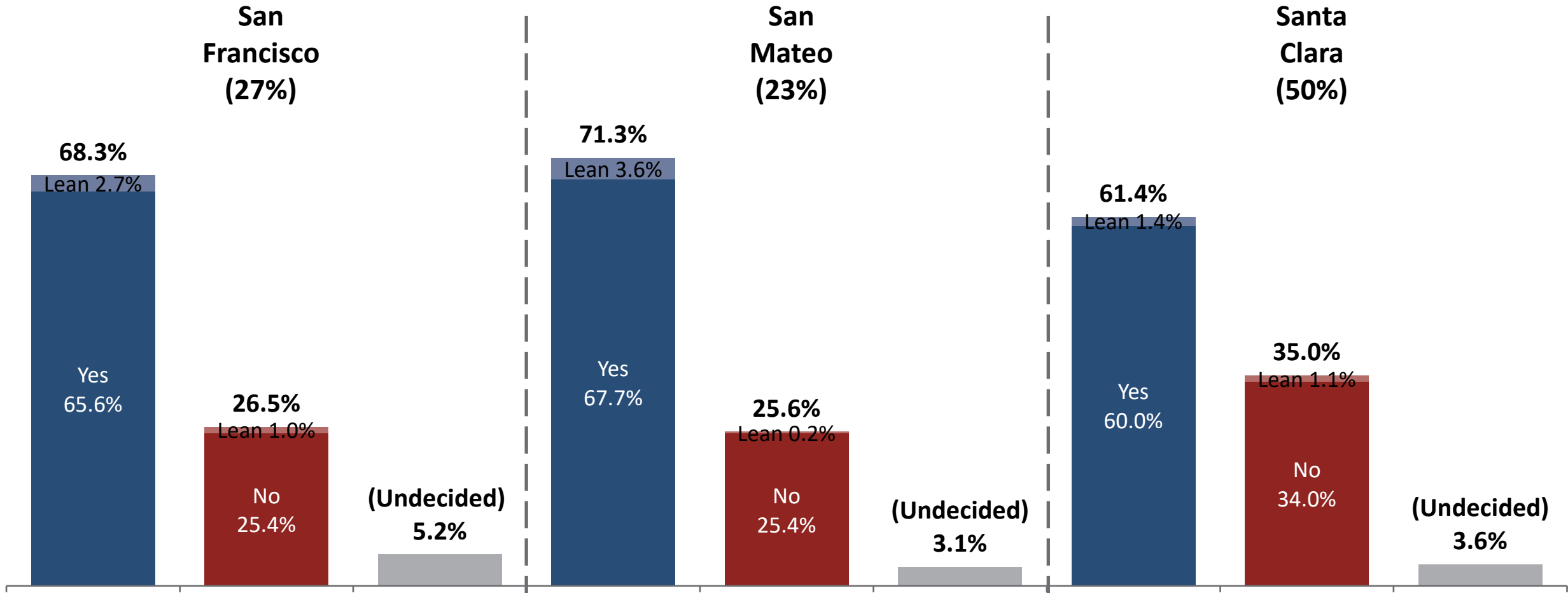
2020 Ballot Question

To preserve Caltrain service and support regional economic recovery, prevent traffic congestion, make Caltrain more affordable and accessible, reduce air pollution with cleaner and quieter electric trains, make travel times faster, and increase Caltrain frequency and capacity between Santa Clara, San Mateo and San Francisco counties, shall the Peninsula Corridor Joint Powers Board's ordinance levying a 30-year one-eighth cent sales tax with oversight and audits, providing approximately \$100 million annually for Caltrain that the State cannot take away, be adopted?



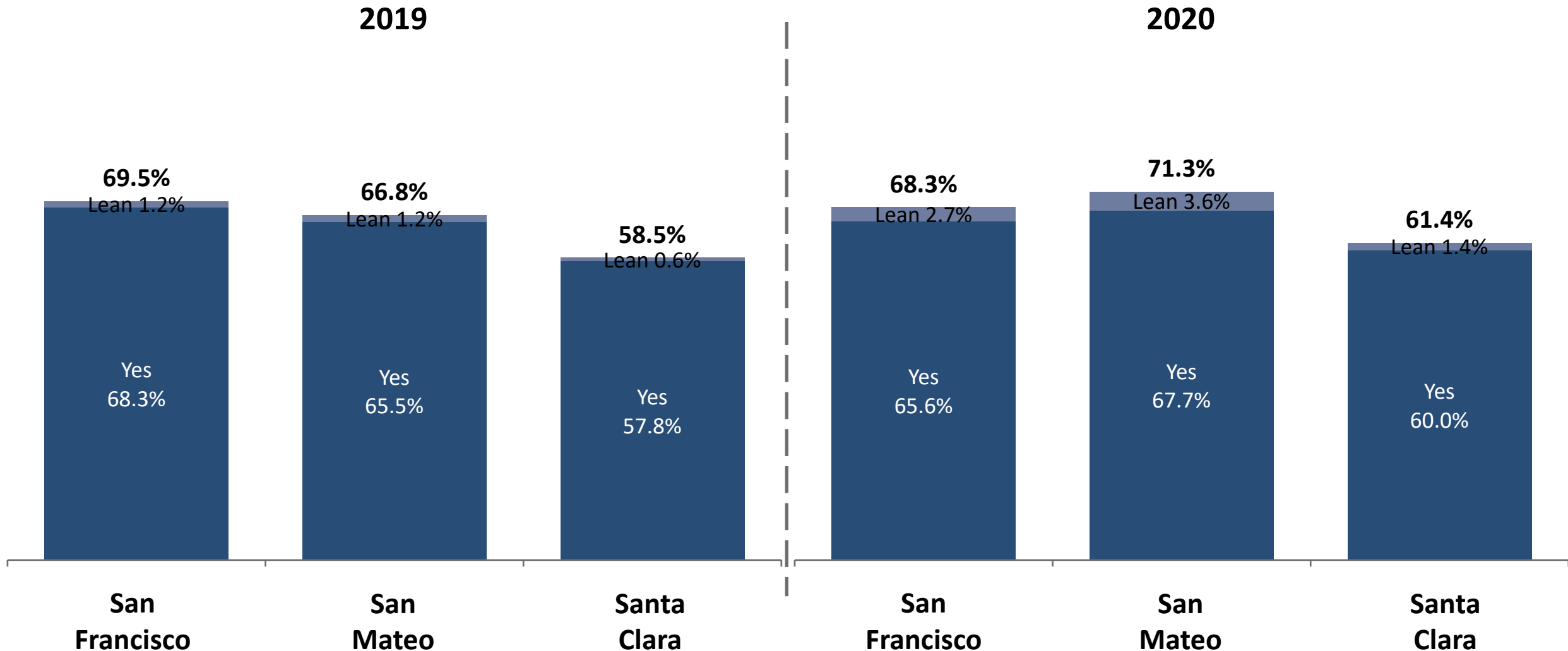
Initial Vote by County

Support in Santa Clara is well below two-thirds.

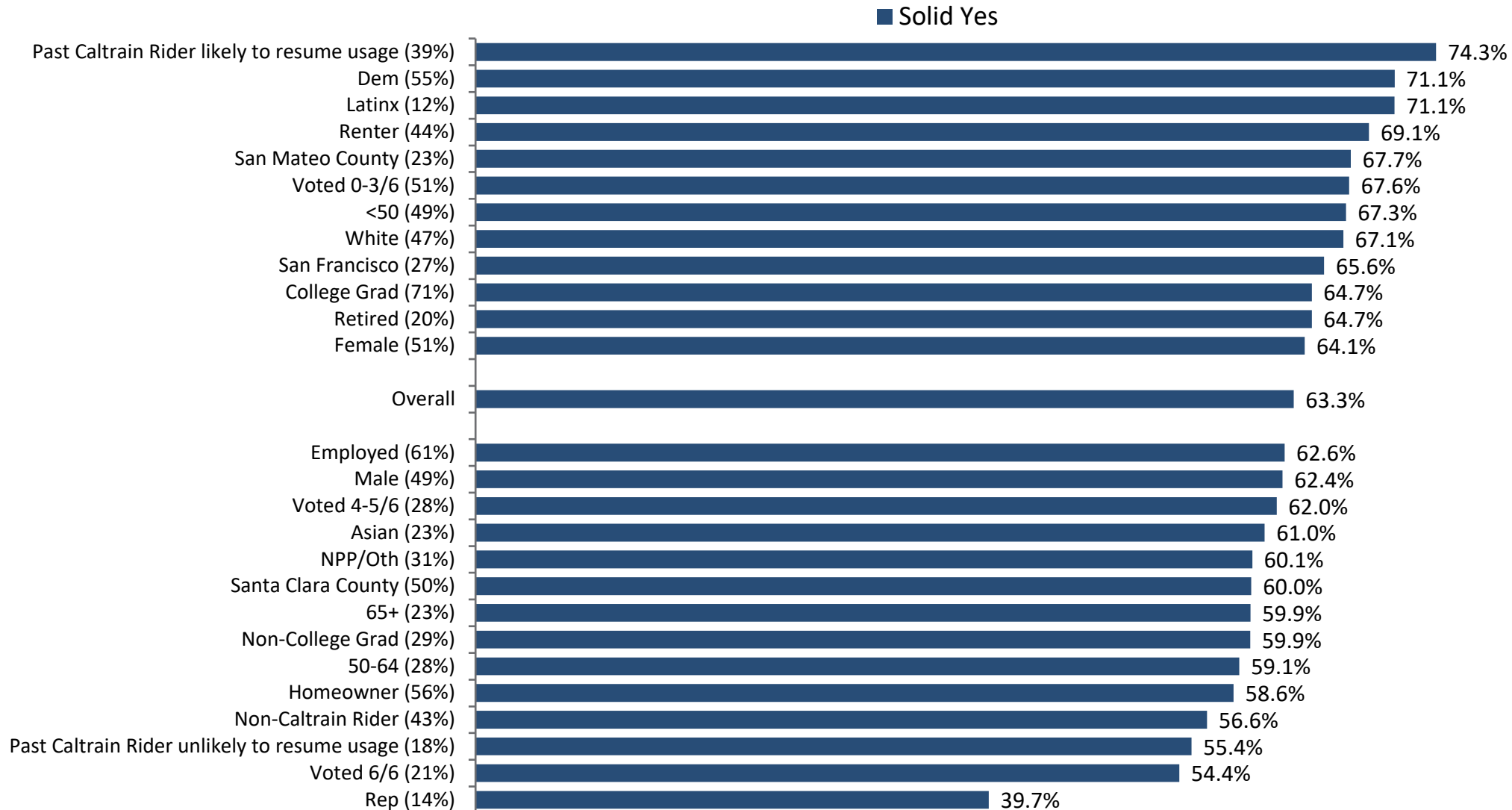


Initial Vote by County

San Francisco and San Mateo Counties remain more supportive of a measure.

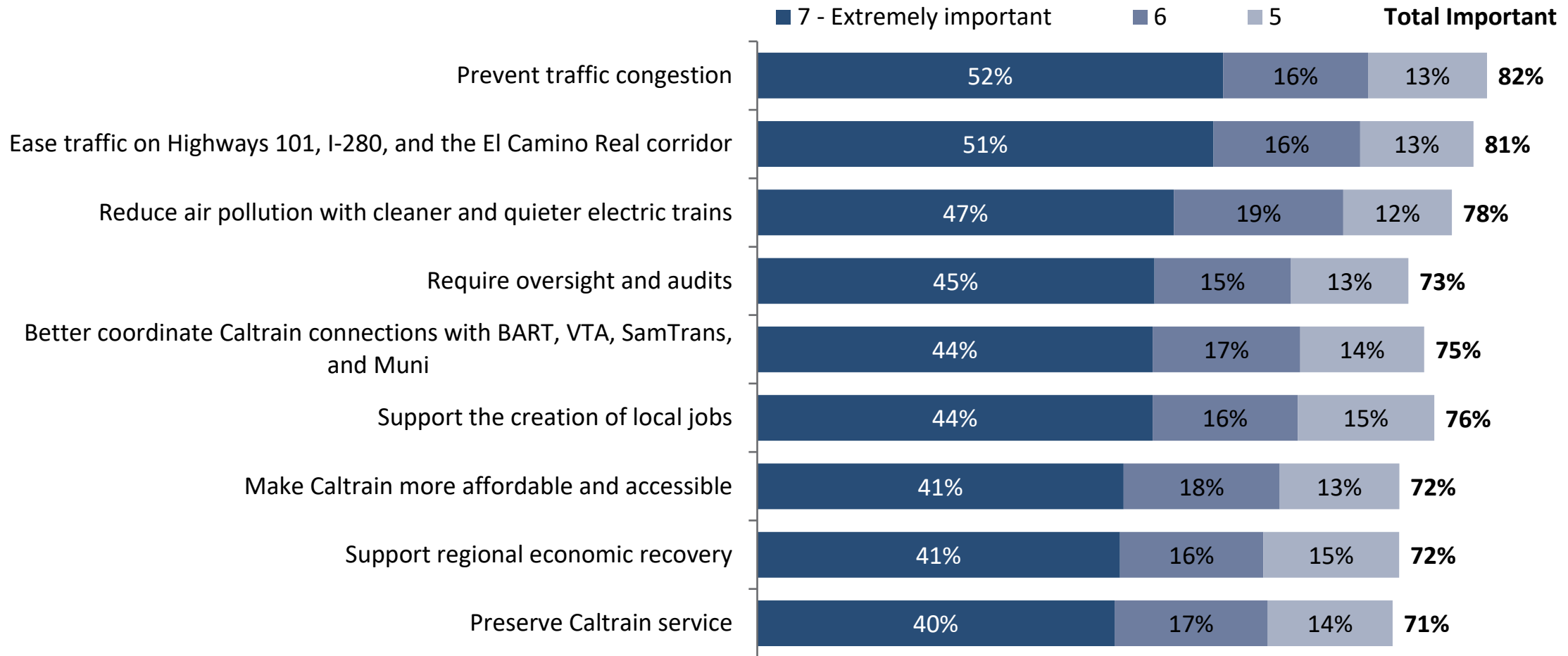


Initial Vote by Subgroups



Importance of Components

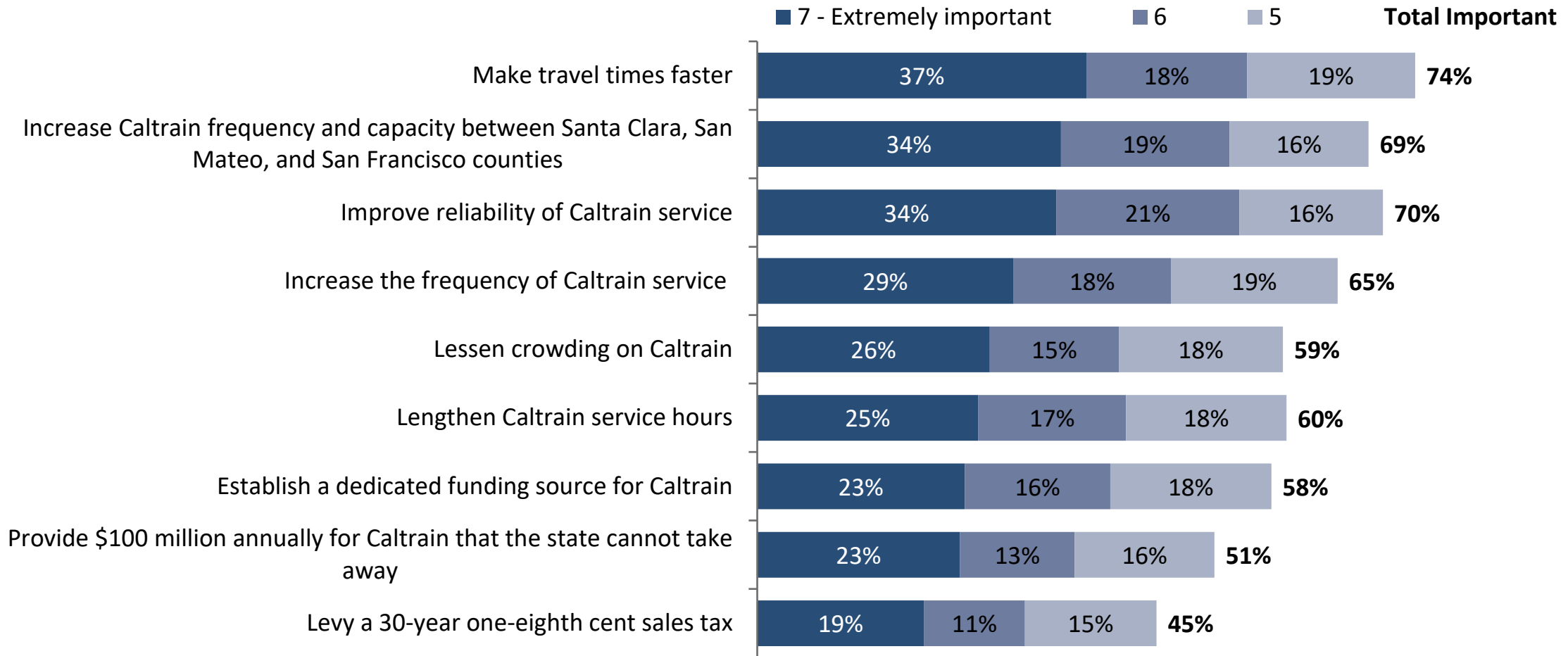
The individual components of the measure are popular, with prevention of traffic and other ancillary benefits rising to the top.



Q7-24. I'm going to read you a list of components that could be included in the proposed Caltrain measure. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, please tell me how important it is that the measure do each of the following.

Importance of Components (cont.)

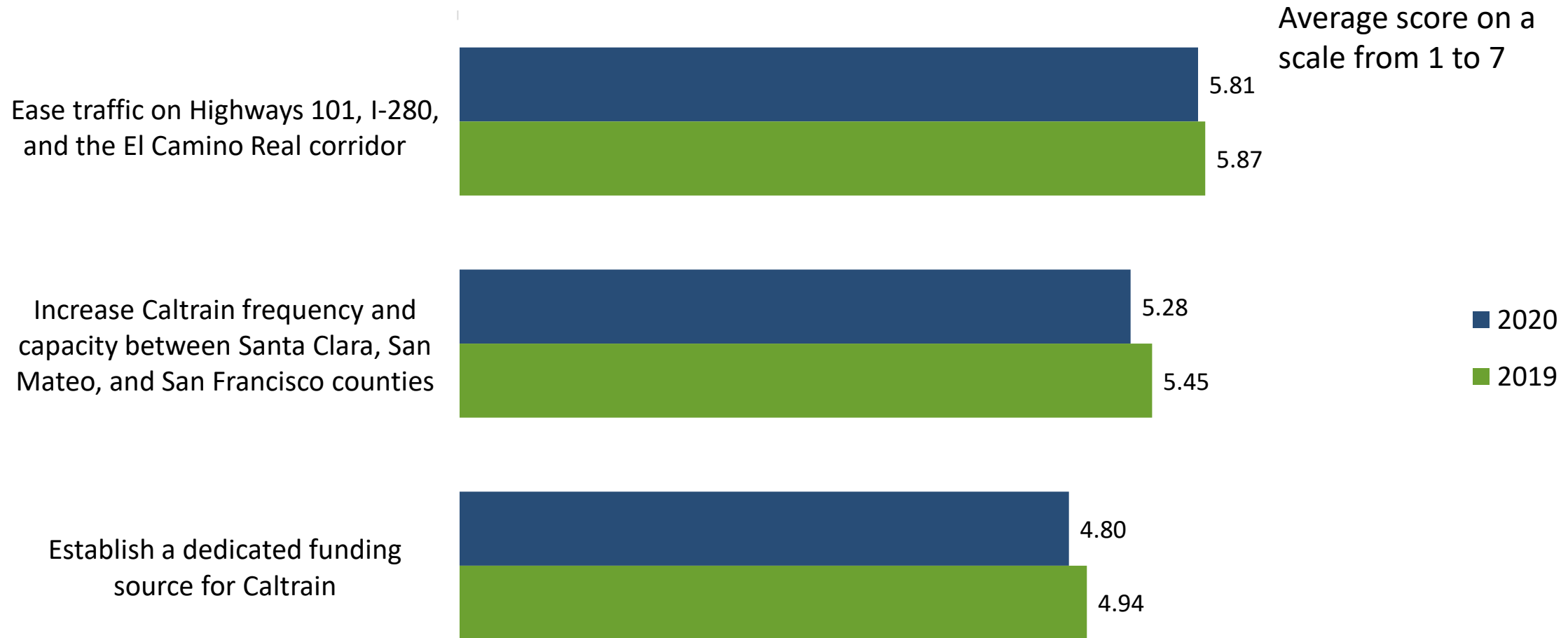
Components more specifically related to improving Caltrain service have less overall support and lower intensity.



Q7-24. I'm going to read you a list of components that could be included in the proposed Caltrain measure. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, please tell me how important it is that the measure do each of the following.

Components Over Time

Ratings on the importance of measure outcomes have barely shifted since a year ago. Even with shelter-in-place, concern about traffic remains high.

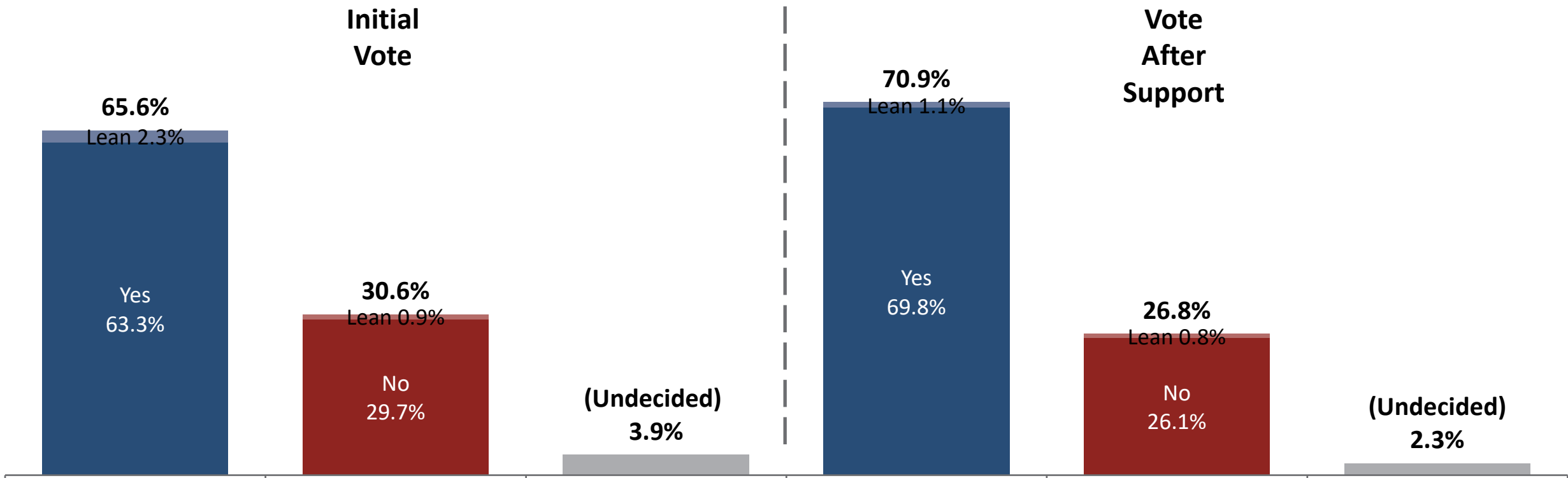


Q7-24. I'm going to read you a list of components that could be included in the proposed Caltrain measure. On a scale from 1 to 7, where 1 is not at all important and 7 is extremely important, please tell me how important it is that the measure do each of the following.

Vote After Information

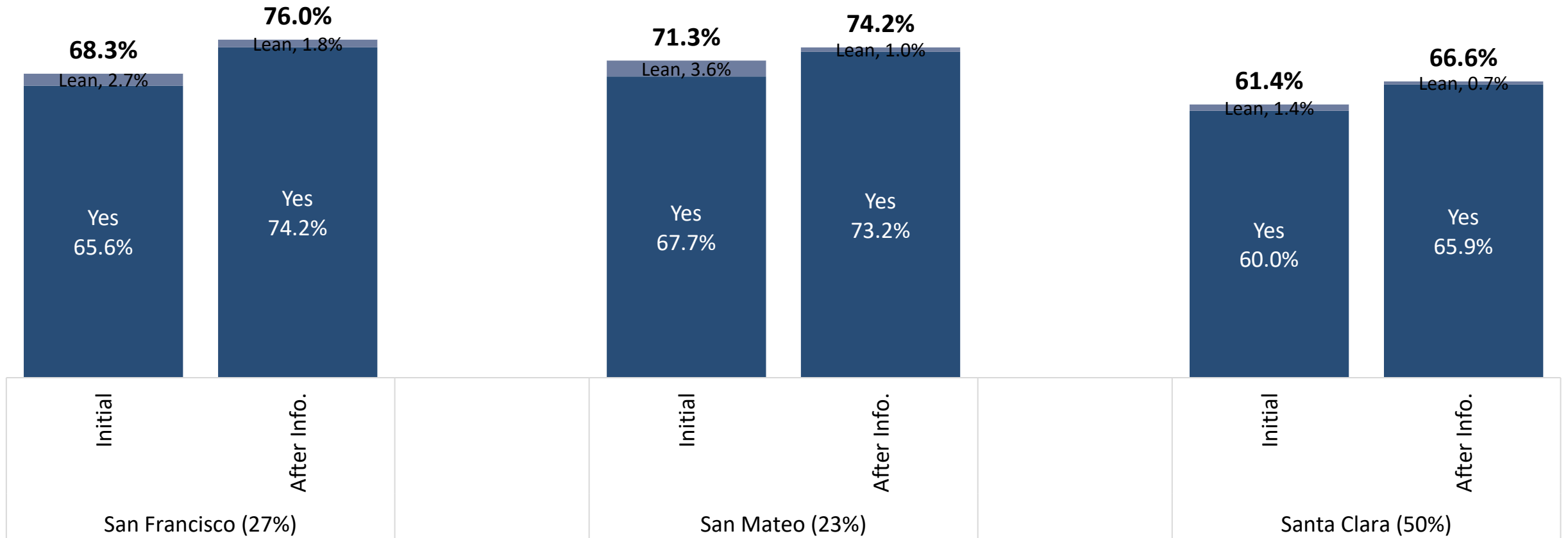
After the individual components and a short proponent argument, net support shifts +9 points, with the yes vote moving above the two thirds threshold.

Supporters of this measure say that Caltrain will always be an essential part of the Bay Area's transportation network. Traffic will come back after the pandemic, and Caltrain riders help to keep millions of cars off our roads every year. This measure will keep Caltrain running and make it easier to ride, with faster and more frequent trains, and better connections to BART, local buses, and light rail. It will also help our whole community with cleaner-running, quieter trains and good paying jobs.



Vote After Information by County

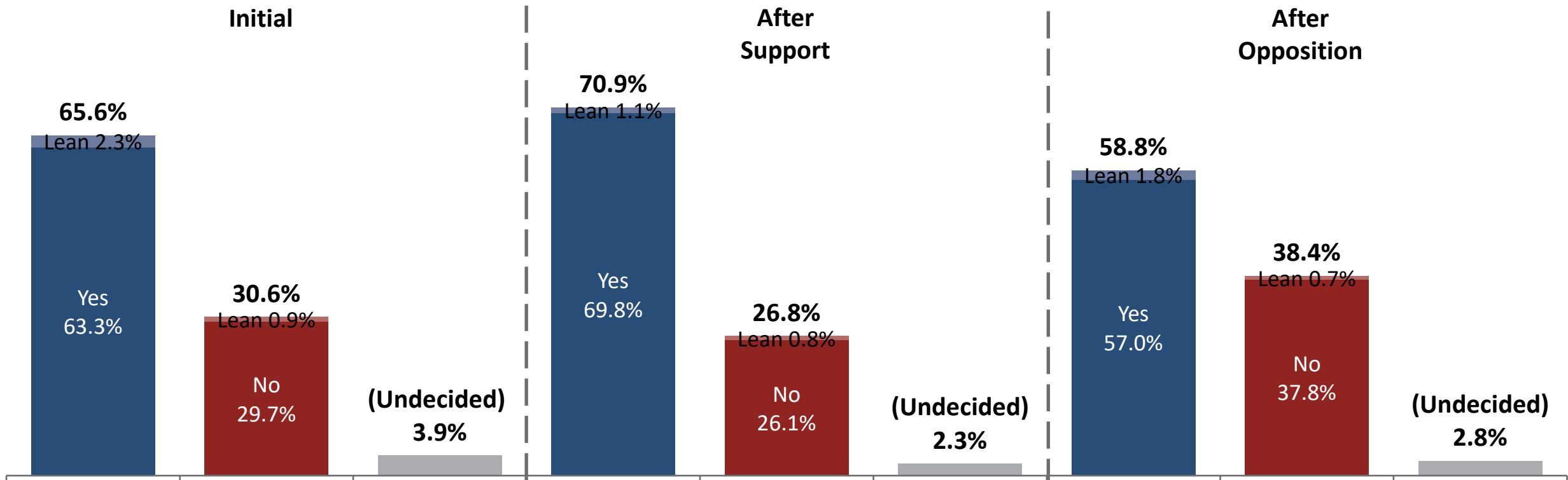
After more information, support rises in all 3 Counties, with total support in Santa Clara approaching the two-thirds threshold.



Vote After Opposition Messaging

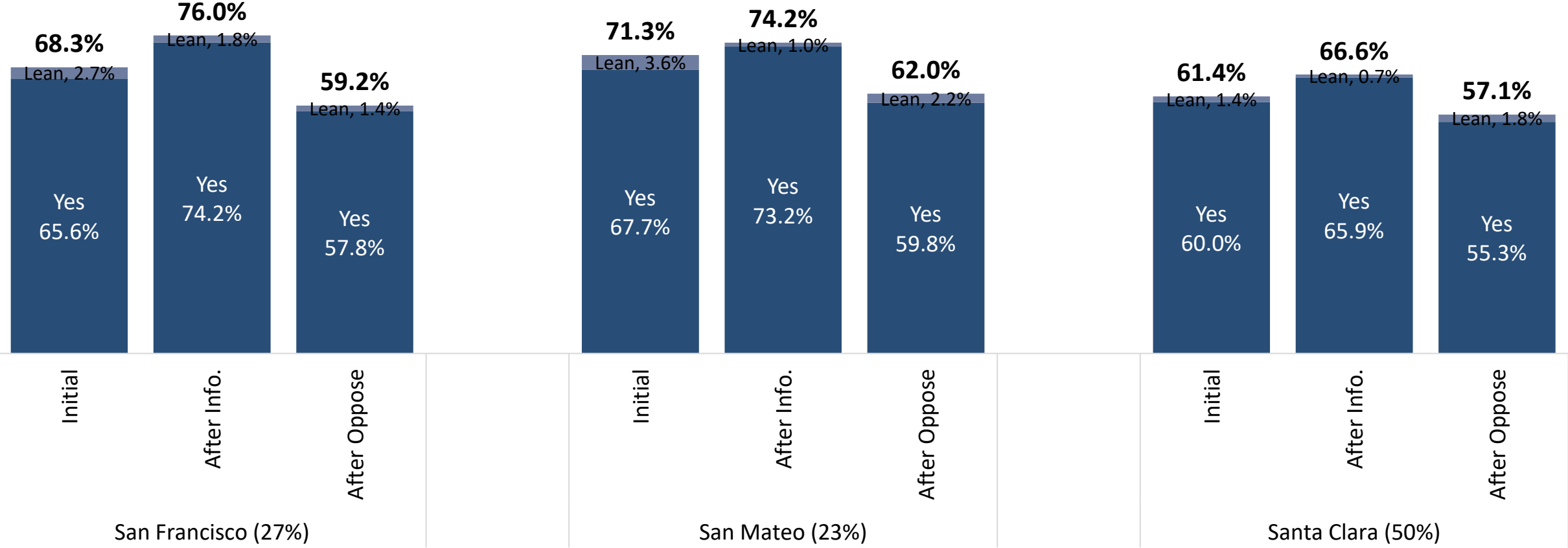
A simple opposition argument drives support well below where it was initially.

Opponents of this measure say with coronavirus decimating the local economy and so many people losing jobs, we just can't afford this new tax. Also, we aren't sure when it will be safe from coronavirus to ride public transit again, and many major regional employers are moving to telecommuting anyway. This is a huge amount of money to waste on a system that only serves a few high-income tech workers anyway, when we will have much more urgent needs in our communities.



Vote After Opposition Messaging by County

Solid support in each of the 3 Counties drops by double-digits after a simple opposition message.





Ruth Bernstein
ruth@emcresearch.com
510.550.8922

Sara LaBatt
sara@emcresearch.com
510.550.8924