

Caltrain



**Survey of Likely Voters
Regarding Potential Caltrain
Revenue Measures**
Executive Summary Presentation
March 2025

Methodology

- ▶ Online-only survey of likely voters in Santa Clara, San Francisco, and San Mateo Counties
- ▶ Survey conducted January 8-23, 2025
- ▶ 1,500 interviews; overall margin of error ± 2.5 percentage points
- ▶ Split sample employed to test three different revenue measure models (a sales tax and two different parcel tax amounts)
 - 500 interviews conducted per sample; margin of error ± 4.4 percentage points
- ▶ Survey invitations sent via SMS and Email; Survey offered in English, Spanish, Chinese, and Vietnamese
- ▶ Where applicable, results compared with previous Caltrain voter surveys:

*Methodology	Dates	Universe	Sample Size	Margin of Error
Phone and Online	June 11 – 18, 2020	Likely Nov. 2020 Voters	1,255	± 2.8 percentage points
Phone and Online	March 25 – April 1, 2019	Likely Nov. 2020 Voters	1,416	± 2.6 percentage points

While the online-only sample is comparably representative of voters as prior surveys, please note that online respondents are less likely to give an undecided response and tend to be slightly more negative than telephone respondents.

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

Survey Context and Timing

The survey was conducted during the leadup to and directly following President Trump's inauguration on January 20 and ensuing executive orders. Other events related to this, such as protests in California and around other areas of the country, also occurred during the data collection period. Additionally, destructive wildfires in Southern California occurred throughout the entire data collection period.

Protests planned throughout Bay Area ahead of Trump's inauguration

Anti-Trump groups are holding protests and marches in San Jose, San Francisco and Alameda

LA wildfires could clobber California economy as state recovers from a pandemic recession

Trump signs slew of executive actions after being sworn in

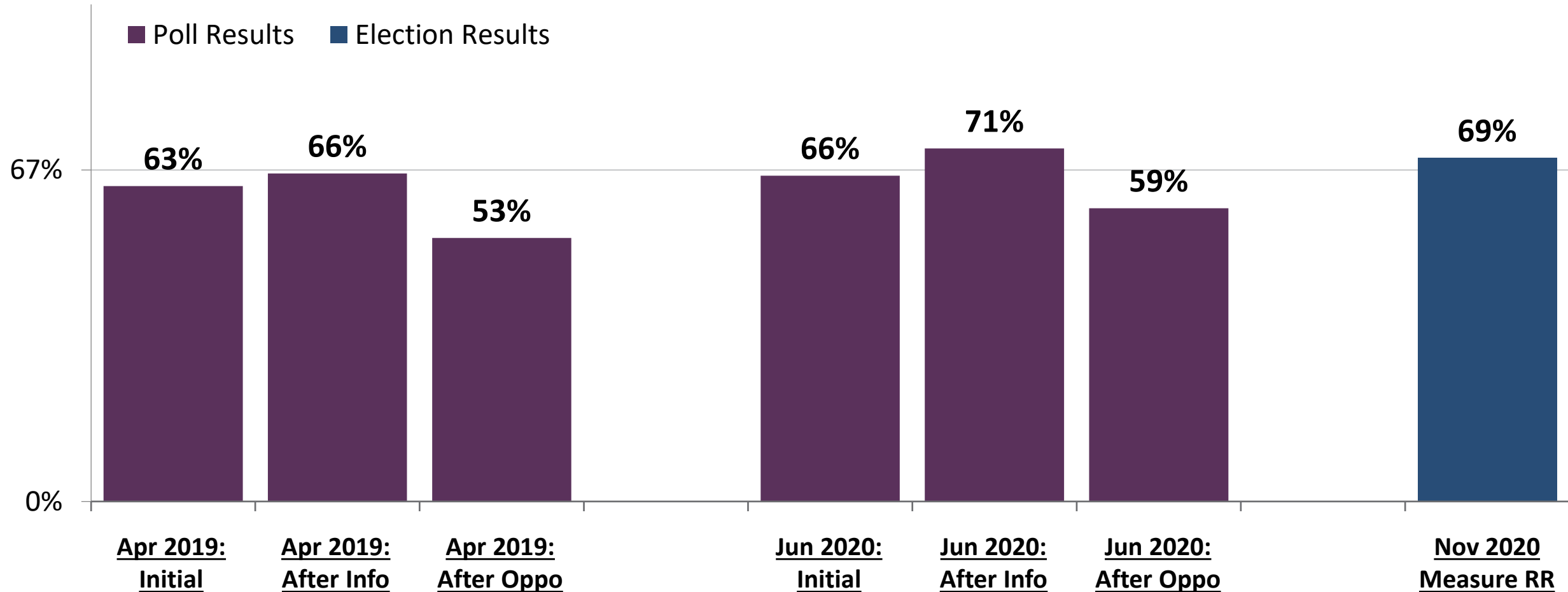
Updated 5:05 AM EST, Tue January 21, 2025

California wildfires: Firefighters battle to contain blazes while thousands wait to return home

Historical Polling and Elections

3-County 1/8 Cent Sales Tax Measure for Caltrain

% Yes



*Passage threshold 66.67%

Key Findings

- ▶ **Voters recognize the need for increased funding for transit**, think that sustaining and improving Caltrain service is important, and overwhelmingly have a favorable view of Caltrain.
- ▶ While most voters rely on driving and do not use transit regularly, **more than eight in ten** have a favorable opinion of Caltrain, and over half have recently seen or heard something about Caltrain.
- ▶ **Voter optimism is growing but** these poll results reveal high levels of voter pessimism and tax hesitancy, indicating a **challenging environment** for a tax measure at this time.
- ▶ For a measure to have an opportunity to succeed, it will be essential for voters to believe that the measure would **result in transit improvements** that would provide better access to jobs and reduce traffic congestion. Reassuring voters that the funds will be spent as promised will be important to ease concerns about accountability.



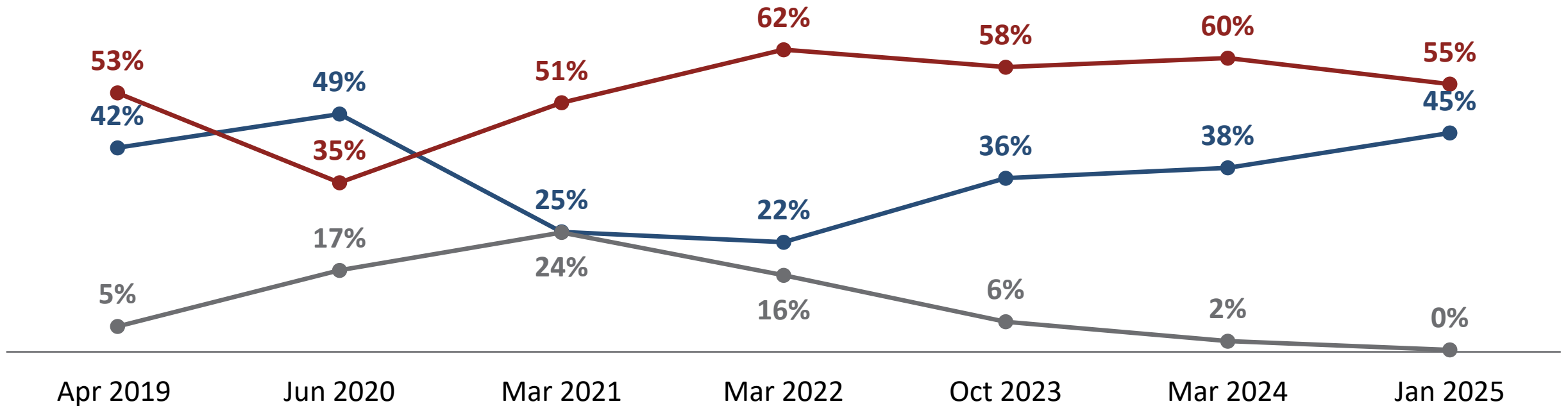
Issue Environment

Right Direction/Wrong Track Trend Over Time

Voter optimism is showing gradual improvement over the past several years.

Do you feel that things in the Bay Area are...

● Generally going in the right direction ● Pretty seriously off on the wrong track ● (Don't know/Refused)



Q3. Do you feel that things in the Bay Area are...

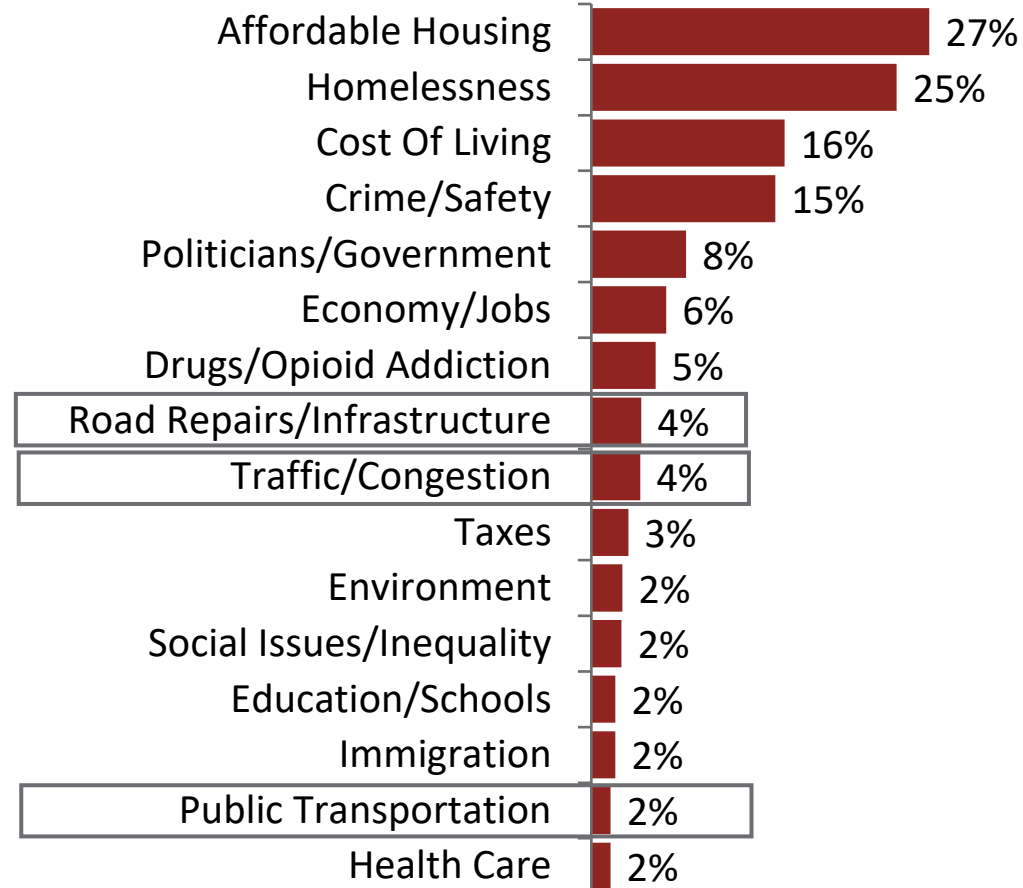
Note: Changes in methodology may impact year-over-year comparisons, especially the proportion of "Don't know" responses.

Most Important Problems

Affordability, homelessness, and crime are top-of-mind concerns for voters. Concern is much lower about transportation issues.

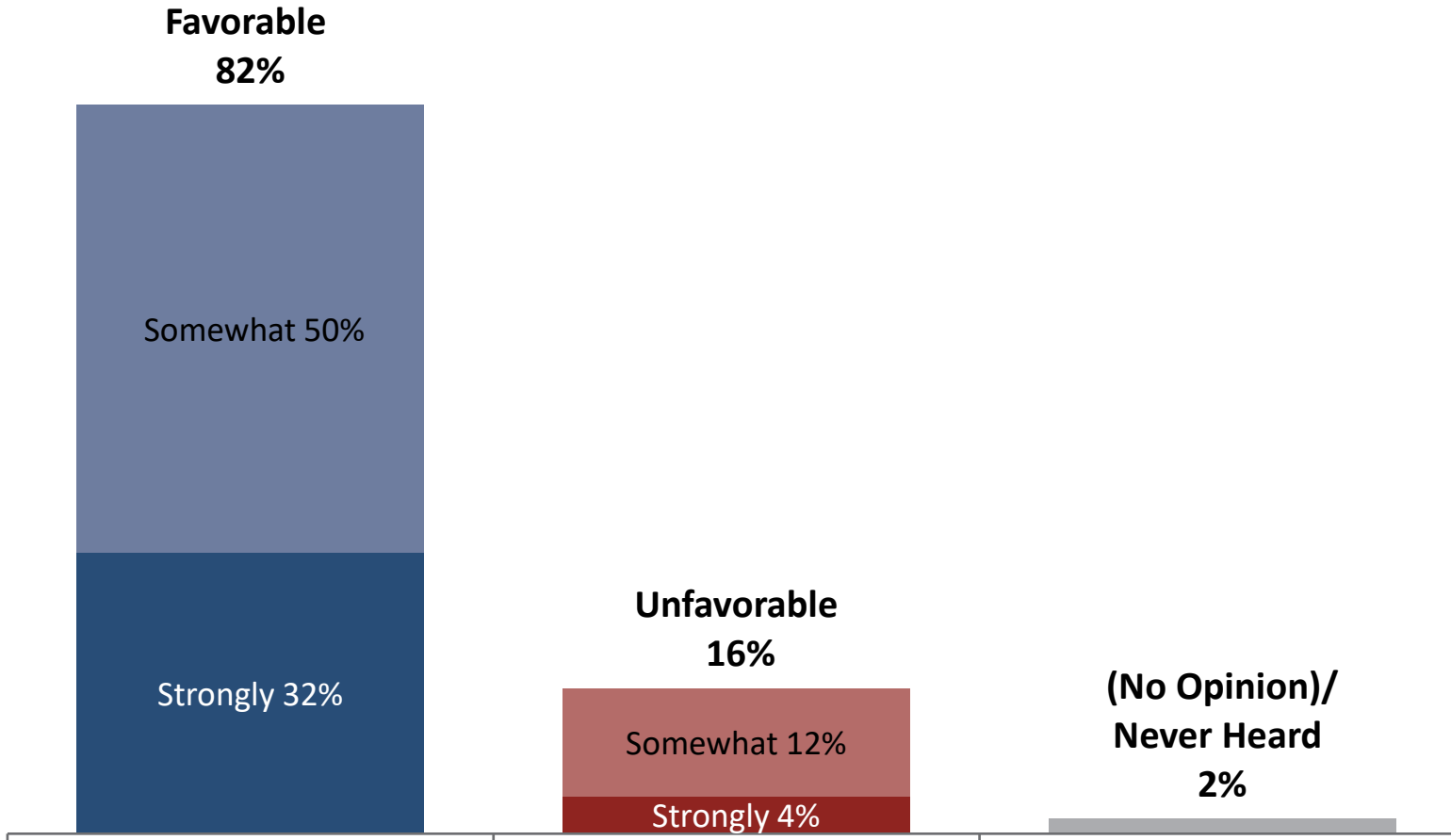
What do you think is the most important problem facing your area today?

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



Caltrain Favorable Rating

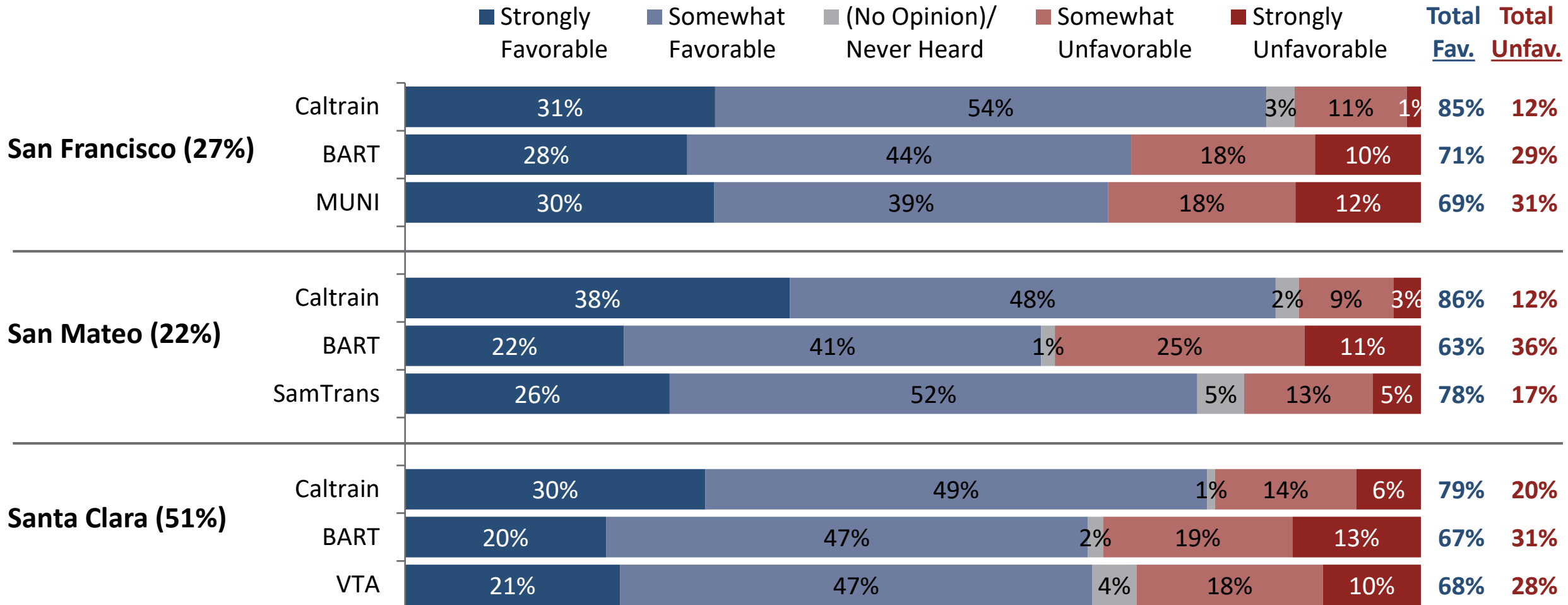
Eight in ten voters have a favorable opinion of Caltrain, with frequent riders the most favorable.



	Fav.	Unfav.	(No Opinion)/ Never Heard
Overall	82%	16%	2%
Monthly+ Caltrain Riders (12%)	91%	8%	1%
Occasional Caltrain Riders (41%)	84%	15%	1%
Caltrain Non-Riders (47%)	78%	20%	2%

Transit Favorable Ratings by County

Most voters have a positive view of their county's largest transit agencies, with Caltrain often receiving the highest overall and most intense favorable ratings.

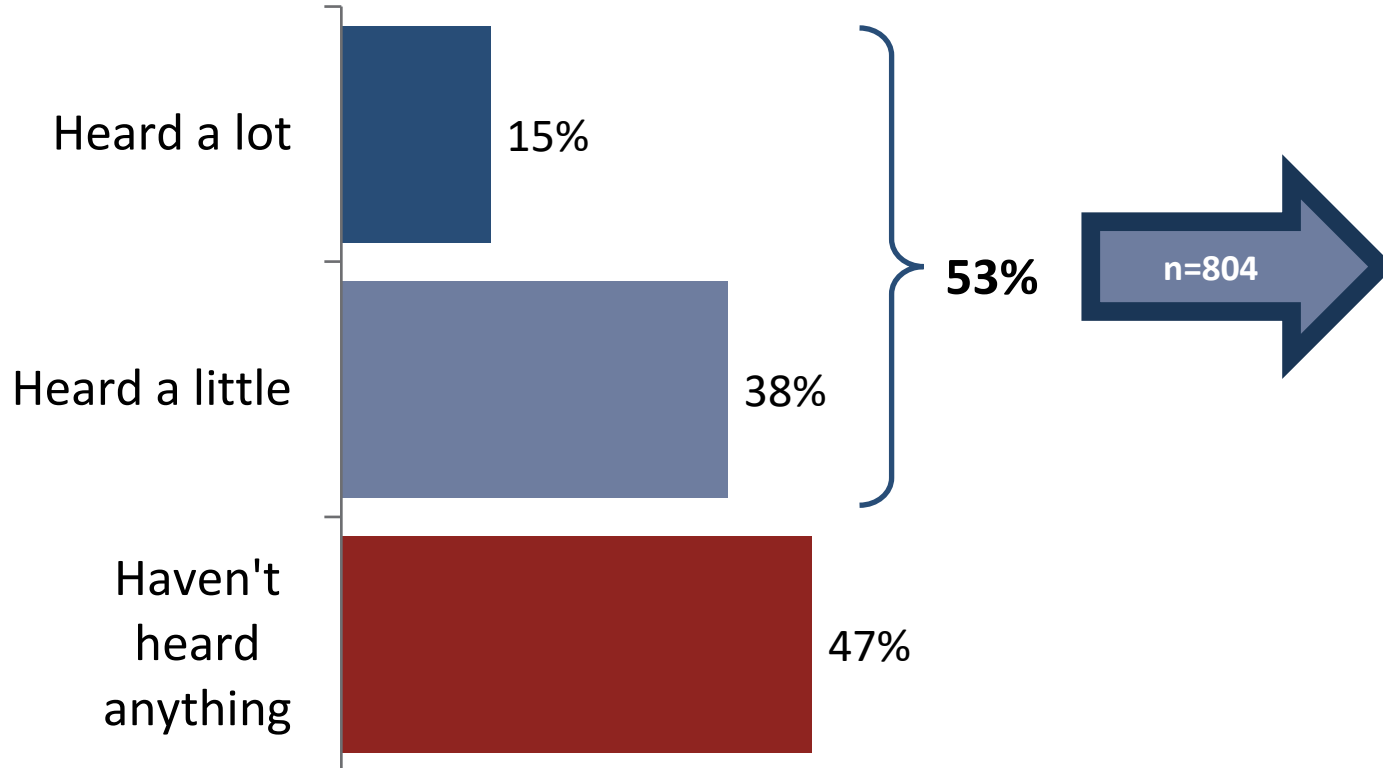


Q5.- Q9. *County specific transit agencies only asked among respective County Voters
 San Francisco 405n MoE=±4.9% points; San Mateo 330n, MoE=±5.4% points; Santa Clara 765n ±3.5% points

Caltrain Awareness

Just over half have heard or seen something about Caltrain recently, with most of those mentioning electrification.

Have you heard or seen anything recently about Caltrain?



What have you heard or seen?

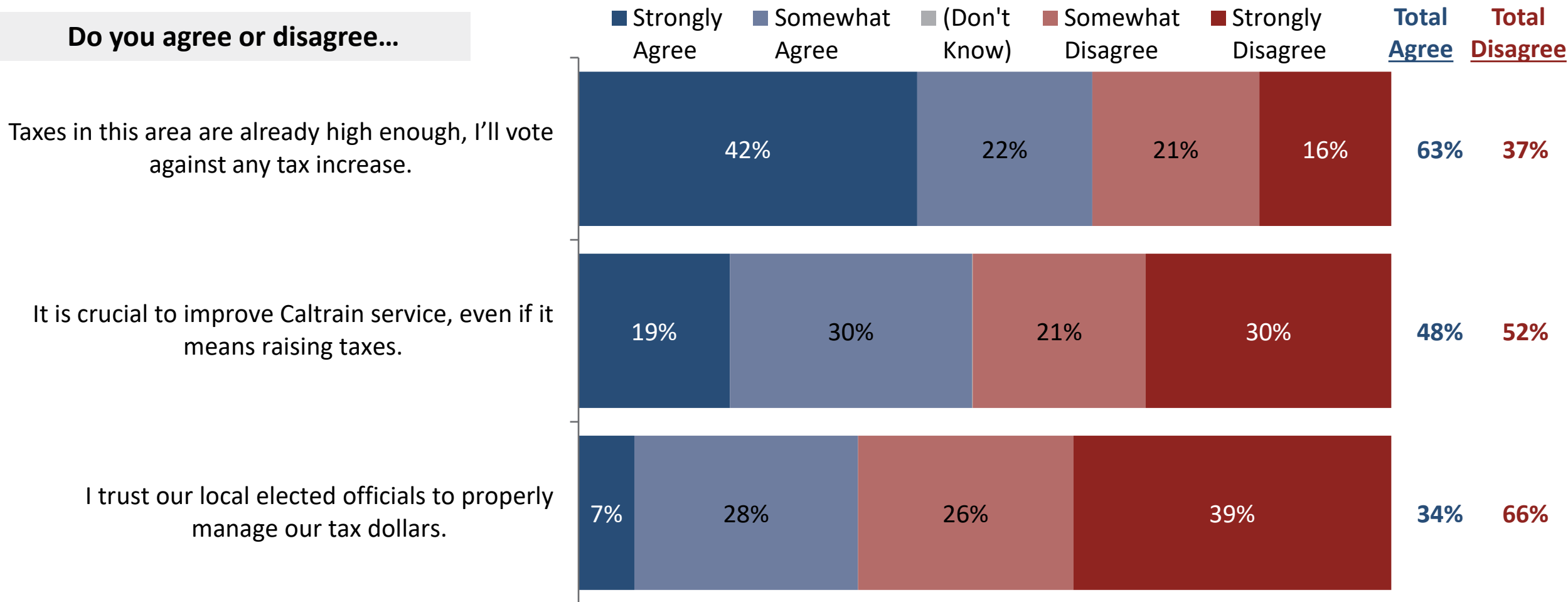
(Open end; verbatim responses coded into categories below; responses above 2% shown)

Response	%
Electrification	47
New/upgraded trains	15
New/expanded schedules	7
Expanding service area	6
Faster trains/Shorter commute times	5
Infrastructure development/Construction	5
Good service	5
News/Social media	4
Crime/Safety	4
Slow/late trains	3
Budget/Spending	3

Taxes and Public Transit

Tax hesitancy is high and trust in elected leaders is low.

Do you agree or disagree...

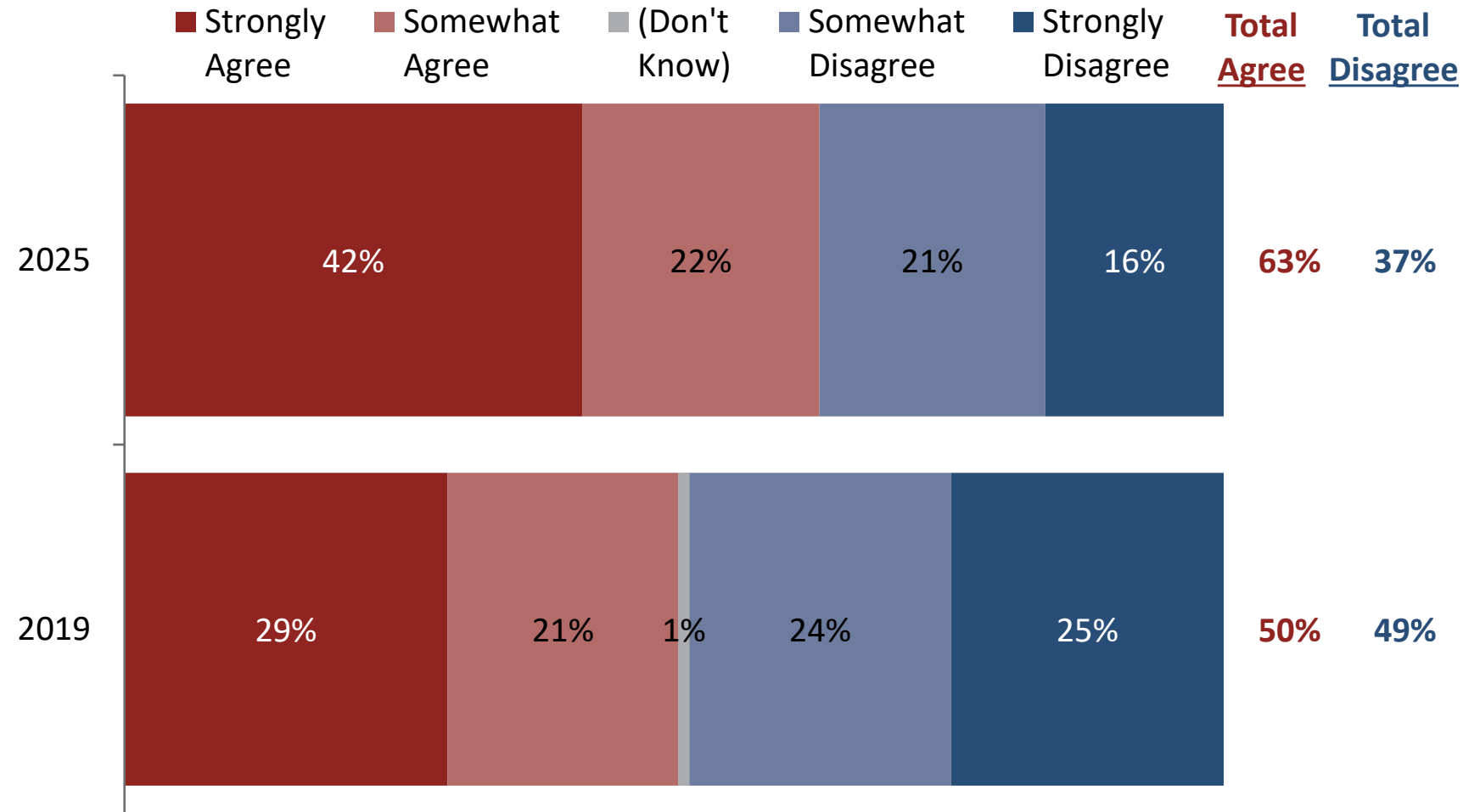


Tax Attitudes Over Time

Tax sensitivity has increased since 2019.

Do you agree or disagree...

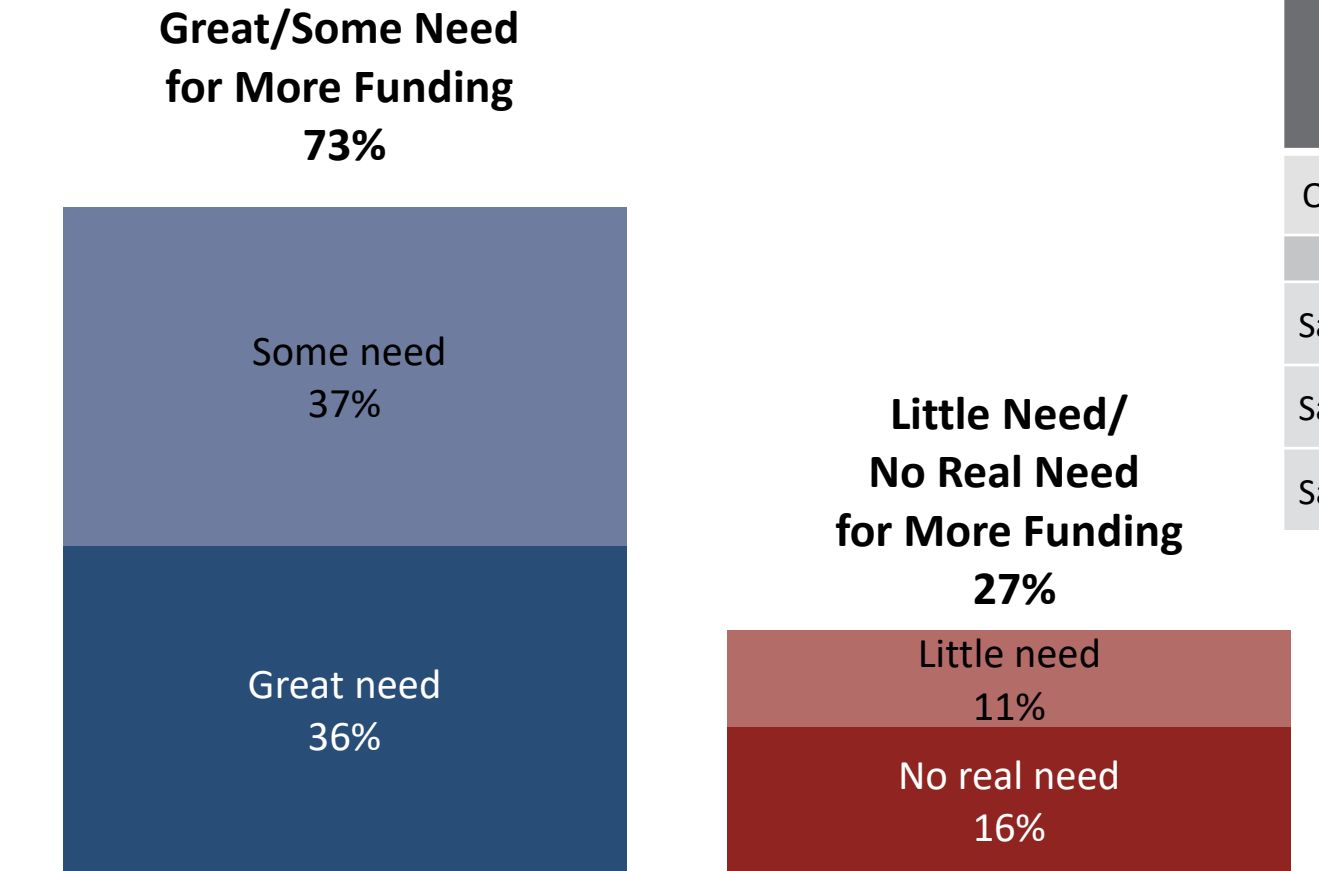
Taxes in this area are already high enough, I'll vote against any tax increase.



Need for Public Transit Funding

Over 70% of voters believe public transit needs more funding across all counties in the District.

Would you say that public transit in your area has...?



	Great/Some Need	Little/No Real Need
Overall	73%	27%
San Francisco (27%)	77%	23%
San Mateo (22%)	73%	27%
Santa Clara (51%)	71%	29%



Potential Revenue Measure

Revenue Measure Wording

Each survey respondent heard or read only one version of the transportation revenue measure, assigned at random.

[Split A] Sales Tax: 1/8 cent

To sustain and improve Caltrain service, support the regional economy, make Caltrain more affordable/accessible, relieve traffic, improve road crossing safety, reduce pollution, improve transit connections, increase frequency, support electrified train service, and reduce travel times between Santa Clara, San Mateo and San Francisco counties, shall the Peninsula Corridor Joint Powers Board's resolution levying a **30-year 1/8 cent sales tax with a detailed expenditure plan and audits, providing an estimated \$124,000,000 annually** for Caltrain, be adopted?

[Split B] Parcel Tax: 5 cents/Sq. Ft.

To sustain and improve Caltrain service, support the regional economy, make Caltrain more affordable/accessible, relieve traffic, improve road crossing safety, reduce pollution, improve transit connections, increase frequency, support electrified train service, and reduce travel times between Santa Clara, San Mateo and San Francisco counties, shall the Peninsula Corridor Joint Powers Board's resolution levying a **30-year tax of 5 cents per square foot of building area, with a detailed expenditure plan and audits, providing an estimated \$124,000,000 annually** for Caltrain, be adopted?

[Split C] Parcel Tax: 9 cents/Sq. Ft.

To sustain/improve Caltrain service, support the regional economy, relieve traffic, **help extend Caltrain to downtown San Francisco**, improve road crossing safety, reduce pollution, improve transit connections, increase frequency, support electrified train service, and reduce travel times between Santa Clara, San Mateo and San Francisco counties, shall the Peninsula Corridor Joint Powers Board's resolution levying a **30-year tax of 9 cents per square foot of building area, with a detailed expenditure plan and audits, providing an estimated \$223,000,000 annually** for Caltrain, be adopted?

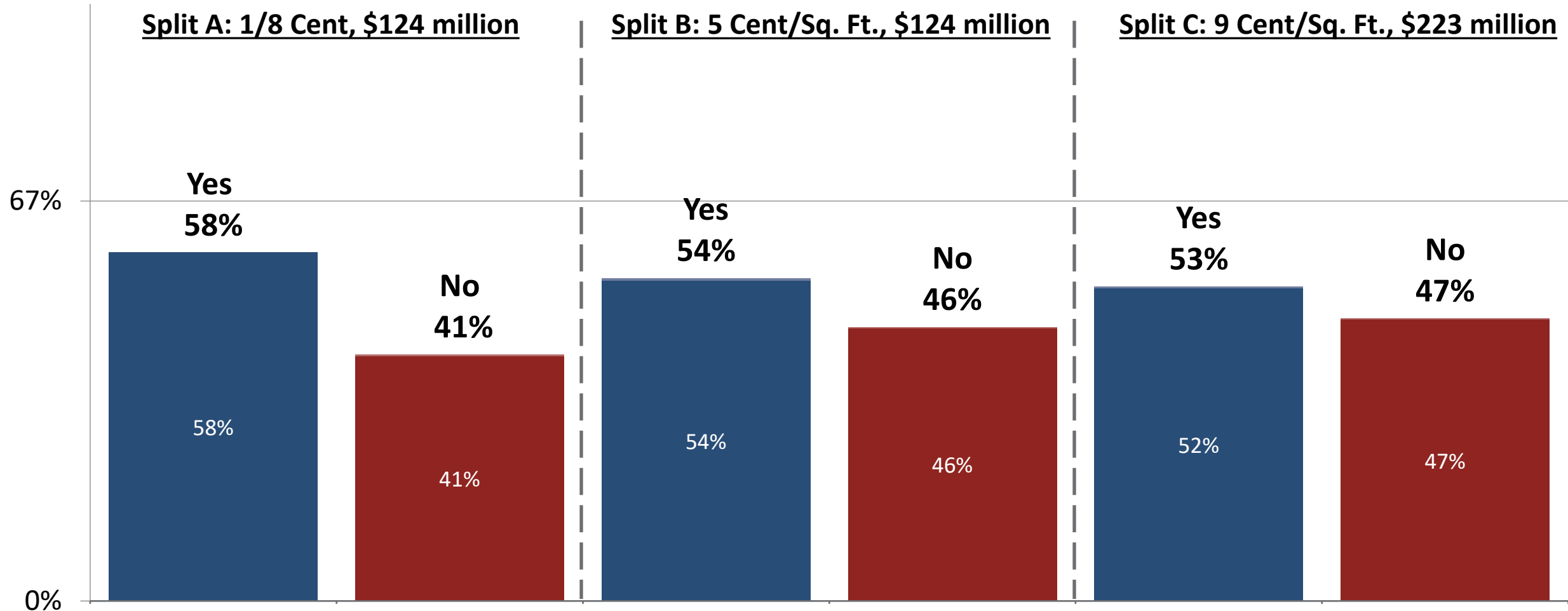
Q13. *Sample size for each split = 500n, MoE=±4.4 % points

*Sample size for each split in each county: San Francisco 135n MoE=±8.4 % points;

San Mateo 110n, MoE=±9.3 % points; Santa Clara 255n ±6.1 % points

Revenue Measure: Initial Support

Initial support for the revenue measures tested for Caltrain is well below two-thirds for any of the models tested. Given the margin of error, there are not statistically significant differences in support.



Q13. If the election were held today, would you vote yes to approve or no to reject this measure?

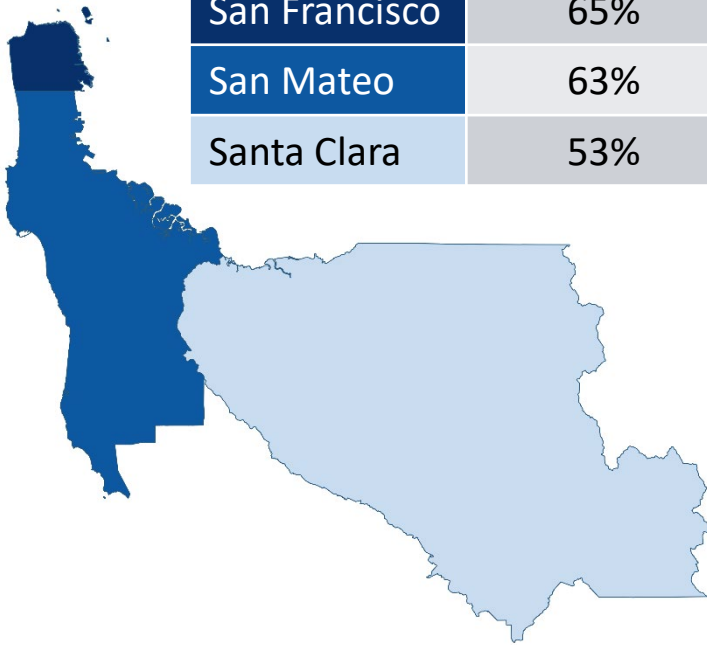
*Sample size for each split = 500n, MoE=±4.4 % points

Revenue Measure: Initial Support by County

San Francisco voters are the most supportive across most of the measures tested.

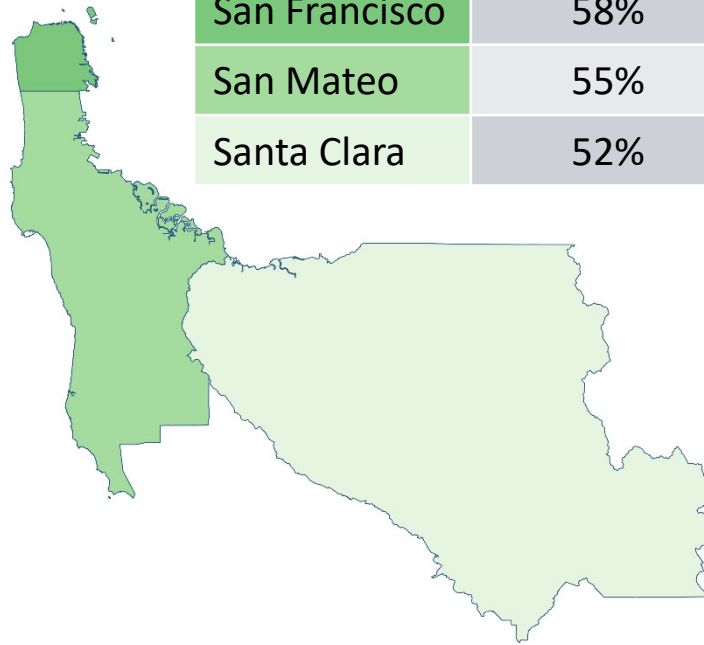
[Split A] Sales Tax: 1/8 cent

County	% Total Yes
San Francisco	65%
San Mateo	63%
Santa Clara	53%



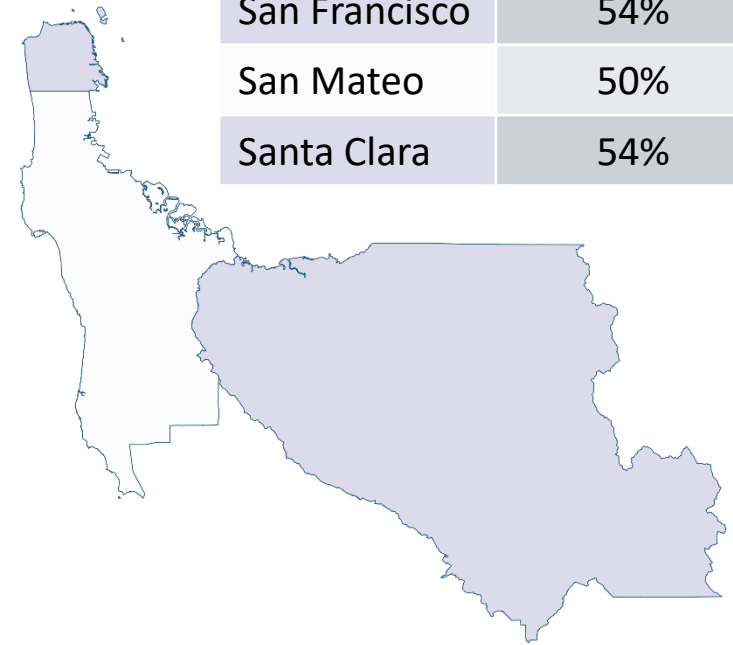
[Split B] Parcel Tax: 5 cents/Sq. Ft.

County	% Total Yes
San Francisco	58%
San Mateo	55%
Santa Clara	52%



[Split C] Parcel Tax: 9 cents/Sq. Ft.

County	% Total Yes
San Francisco	54%
San Mateo	50%
Santa Clara	54%



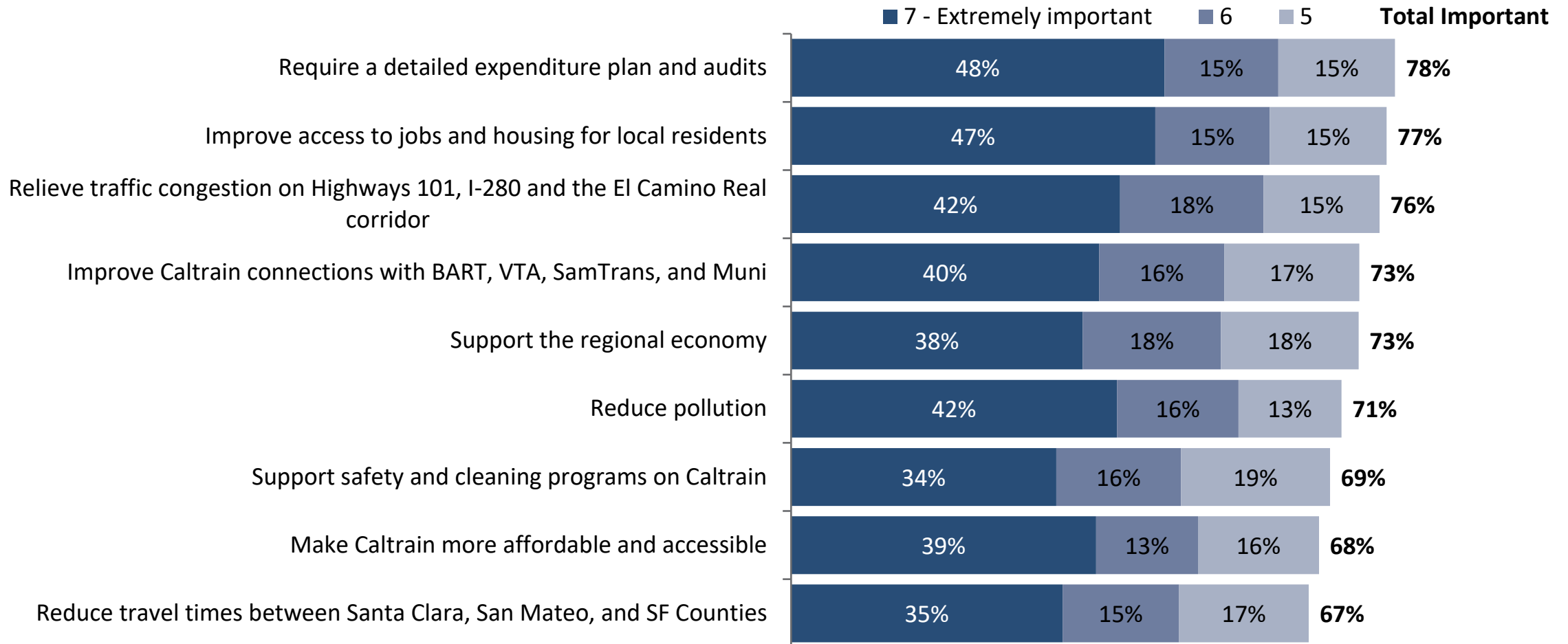
Q13. If the election were held today, would you vote yes to approve or no to reject this measure?

*Sample size for each split = 500n, MoE=±4.4 % points

*Sample size for each split in each county: San Francisco 135n MoE=±8.4 % points; San Mateo 110n, MoE=±9.3 % points; Santa Clara 255n ±6.1 % points

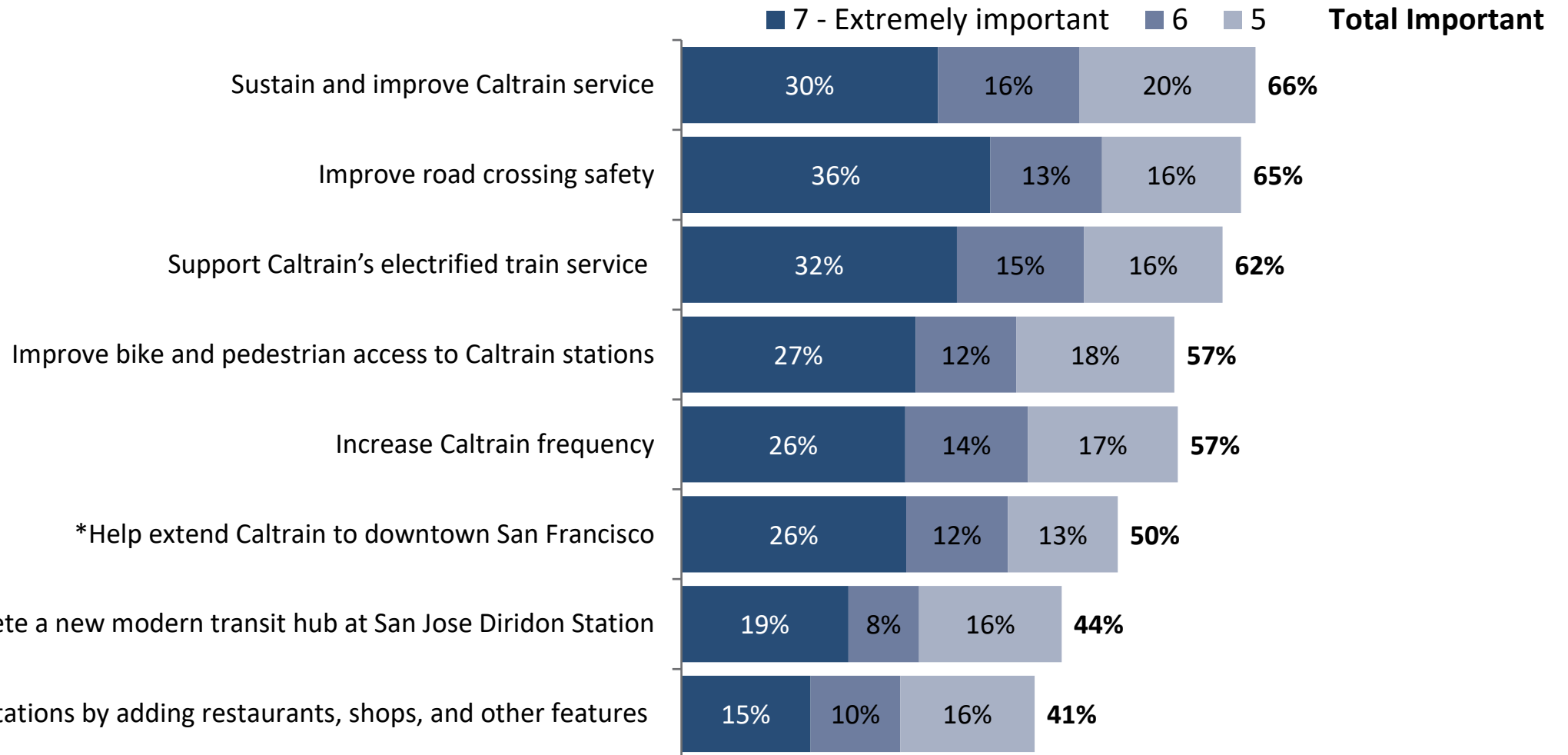
Importance of Components

Voters would like to know there are requirements attached to the measure for audits and a detailed plan, and they prioritize broad outcomes like improved access to jobs and housing, traffic congestion relief, better transit connections, and support for the regional economy.



Importance of Components (Cont.)

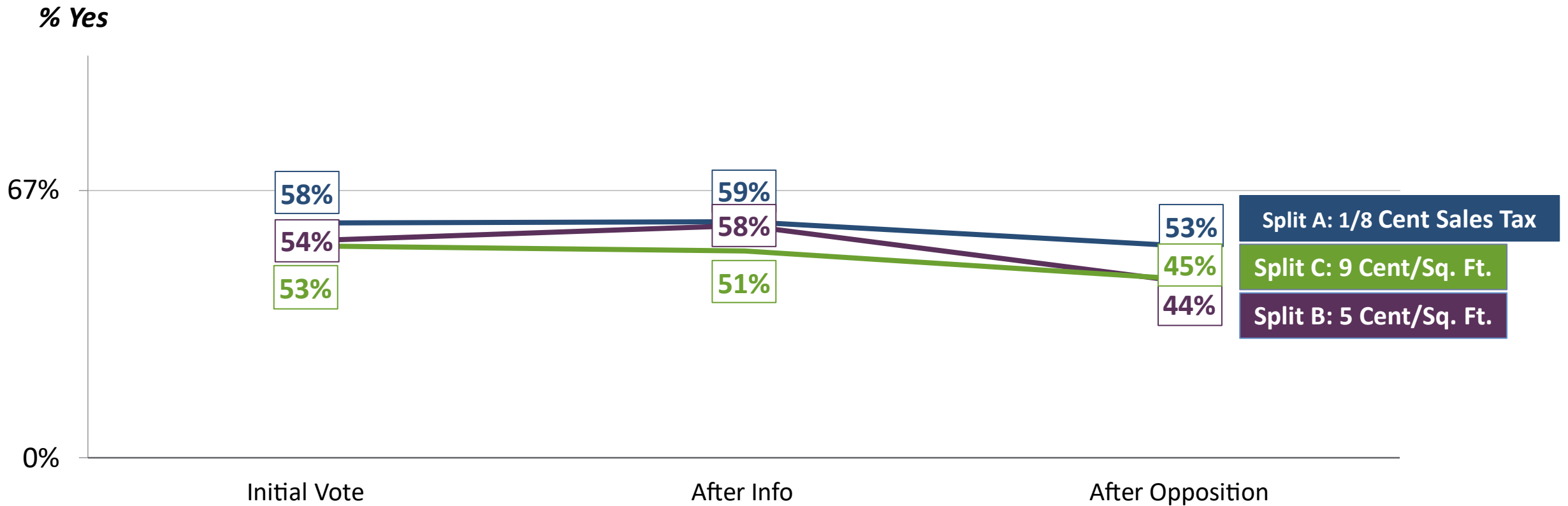
Other components are also important, although less so.



Note: *Split C only

Revenue Measure: Vote Progression

Providing additional information about a measure does not significantly impact support, but opposition messaging is damaging.



Q48. Opponents of the potential Caltrain measure say...

After reading this, would you vote yes to approve or no to reject a 1/8 sales tax/tax of 5 cents per square foot of building area/tax of 9 cents per square foot of building area for Caltrain?

Conclusions and Recommendations

- ▶ Although voter optimism is growing, these poll results reveal high levels of voter pessimism and tax hesitancy, indicating a challenging environment for a tax measure at this time.
- ▶ Voters recognize the need for increased funding for transit, think that sustaining and improving Caltrain service is important, and overwhelmingly have a favorable view of Caltrain.
- ▶ However, with strong anti-tax sentiment and low trust in government presenting significant challenges, none of the potential measures tested approach the two-thirds threshold across the three Caltrain counties combined. Additional information does not significantly increase support levels, and opposition is effective at undercutting support.
- ▶ For a measure to have an opportunity to succeed, it will be essential for voters to believe that the measure would actually result in transit improvements that would provide better access to jobs and reduce traffic congestion. Building trust with transparency and accountability is critical to overcoming voter hesitation on a new tax.



Ruth Bernstein
Ruth@EMCresearch.com
510.550.8922

Sara LaBatt
Sara@EMCresearch.com
510.550.8924