



Regional Measure 3 – Bridge Toll Survey Summary Report of Survey Results December 2017

Methodology

- ▶ Telephone/web hybrid survey of likely June 2018 voters in the nine-county San Francisco Bay Area
- ▶ Conducted November 27 – December 11, 2017
- ▶ The survey was available in English, Chinese, and Spanish
- ▶ Telephone interviews were conducted on both landlines and cellphones
- ▶ 4,151 total interviews
- ▶ Three-way split to test three different toll measures; the margin of error for each sample is ± 2.6 percentage points
- ▶ Margin of error in each county/subregion is approximately ± 4.0 percentage points. Marin/ Sonoma and Napa/ Solano counties combined into two subregions
- ▶ Overall results are weighted proportionally to represent the June 2018 nine county Bay Area electorate

As with any opinion research, the release of selected figures from this report without the analysis that explains their meaning would be damaging to EMC. Therefore, EMC reserves the right to correct any misleading release of this data in any medium through the release of correct data or analysis.

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

Key Findings

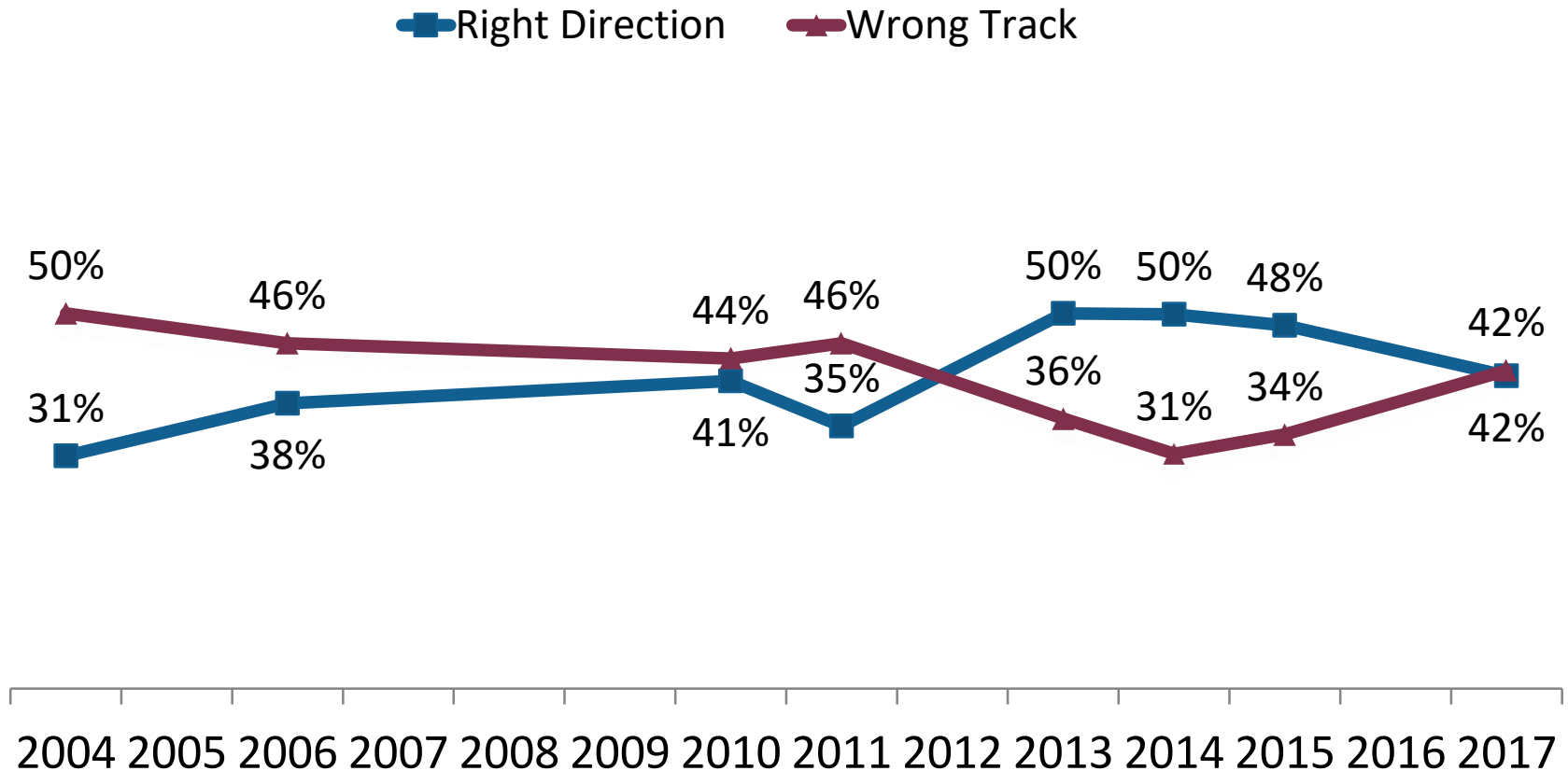
- ▶ Housing and transportation are top of mind concerns for Bay Area voters, and the majority agree that traffic in the area has gotten worse over the last year.
- ▶ There is widespread support for a regional transportation measure, and the amount of the increase appears to have little impact on opinion.
- ▶ Voters rate a wide variety of projects that would be funded by the measure as important. Projects involving BART make up three of the five top projects tested Bay Area wide.



Voter Mood

Bay Area Right Direction/Wrong Track

Voter optimism is divided.



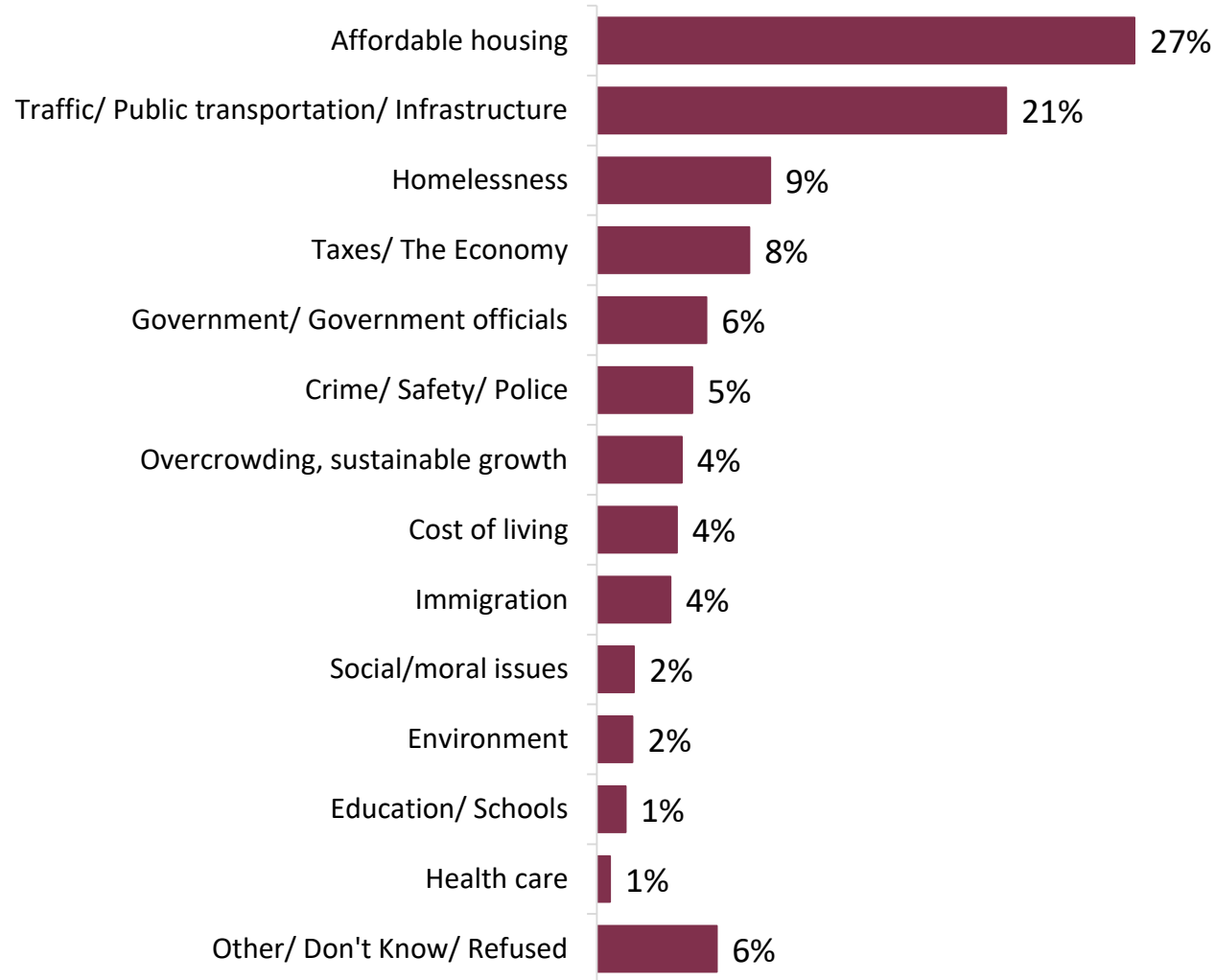
*Poll conducted by FM3

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 Problem (Open-Ended)

Among Bay Area voters, concerns around affordable housing and transportation rise to the top.



Q5. What do you think is the most important problem facing the Bay Area today?
Open-ended: Respondents were allowed to volunteer any response.

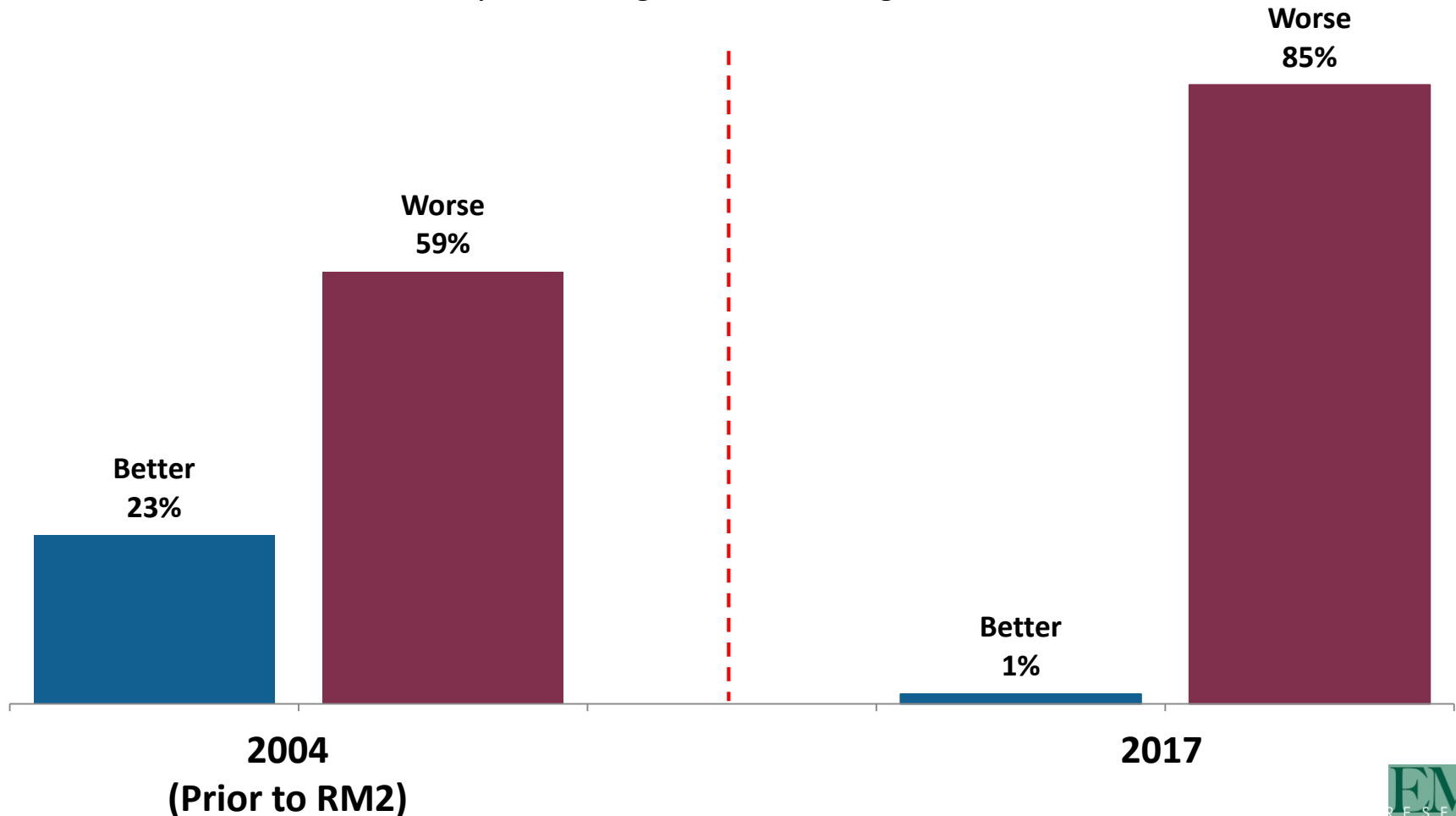


Bay Area Traffic and Transportation

Traffic in the Bay Area

There is overwhelming agreement that traffic in the Bay Area has gotten worse over the last year.

Thinking back over the last year or so, would you say the **traffic** in the Bay Area has gotten better or gotten worse?

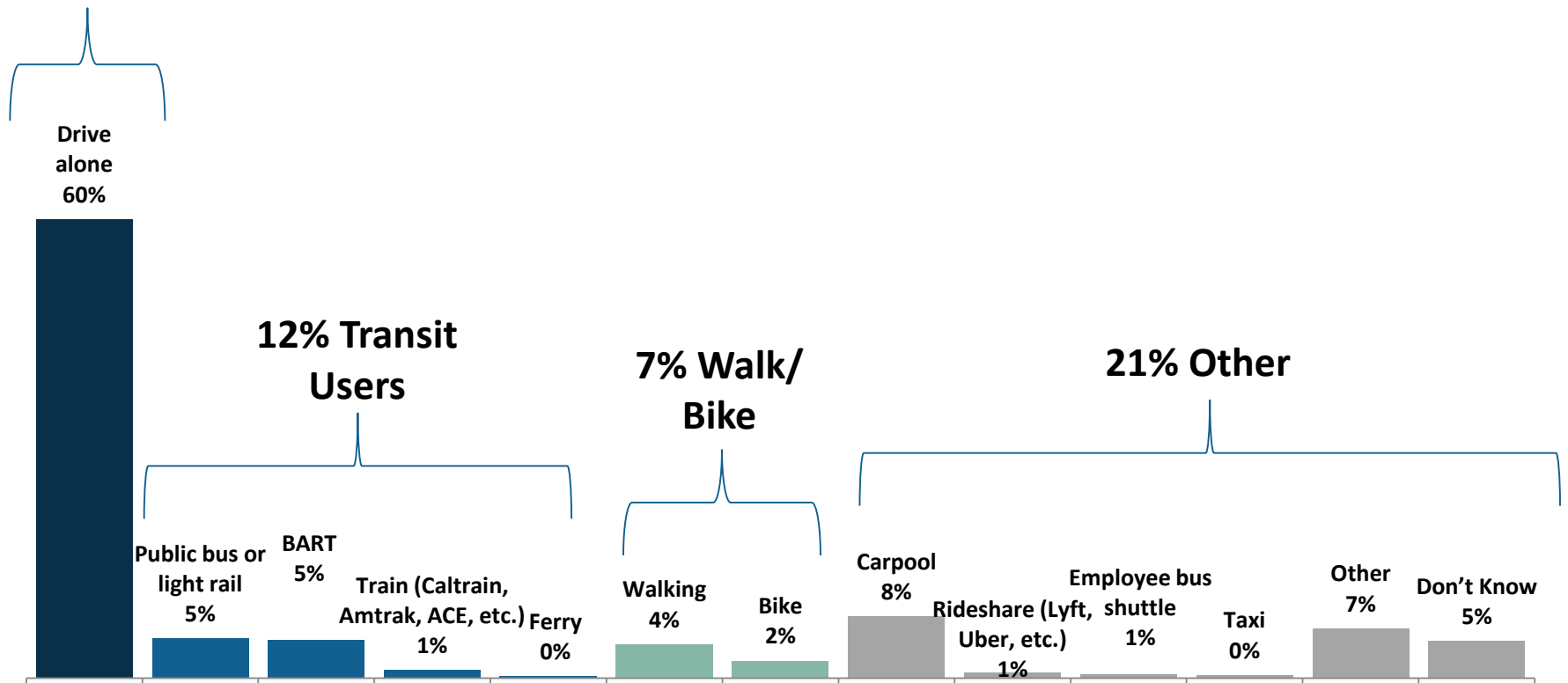


Transit Mode

Most commuters drive alone; 12% report taking transit as their primary transportation.

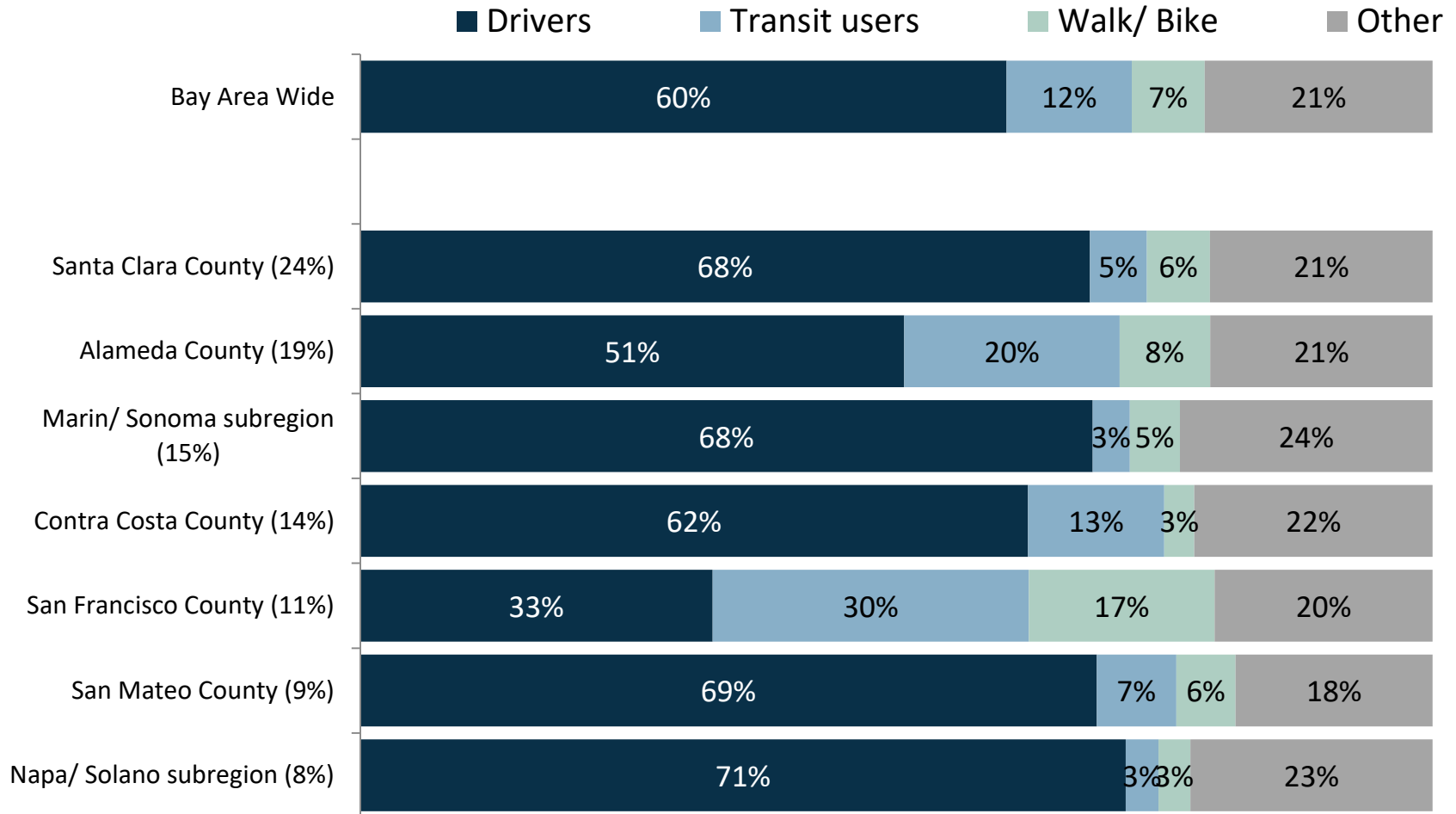
What is your primary mode of transportation during commute hours, meaning the one you use most often?

60% Drivers



Transit Mode Demographics

San Francisco and Alameda have the lowest percentage of drivers.



Q45. What is your primary mode of transportation during commute hours, meaning the one you use most often?



Regional Measure 3: Bay Area Regional Traffic Relief Plan

Ballot Question

BAY AREA REGIONAL TRAFFIC RELIEF PLAN. Shall voters authorize a plan to reduce traffic, improve commutes, relieve crowding on BART, reduce freeway bottlenecks, build carpool lanes, and improve bus, ferry, BART and commuter rail service and reliability,

(\$1)

by approving a \$1 toll increase, effective in 2019

(\$1 + \$1)

with a \$1 toll increase effective in 2019, and a \$1 increase in 2023,

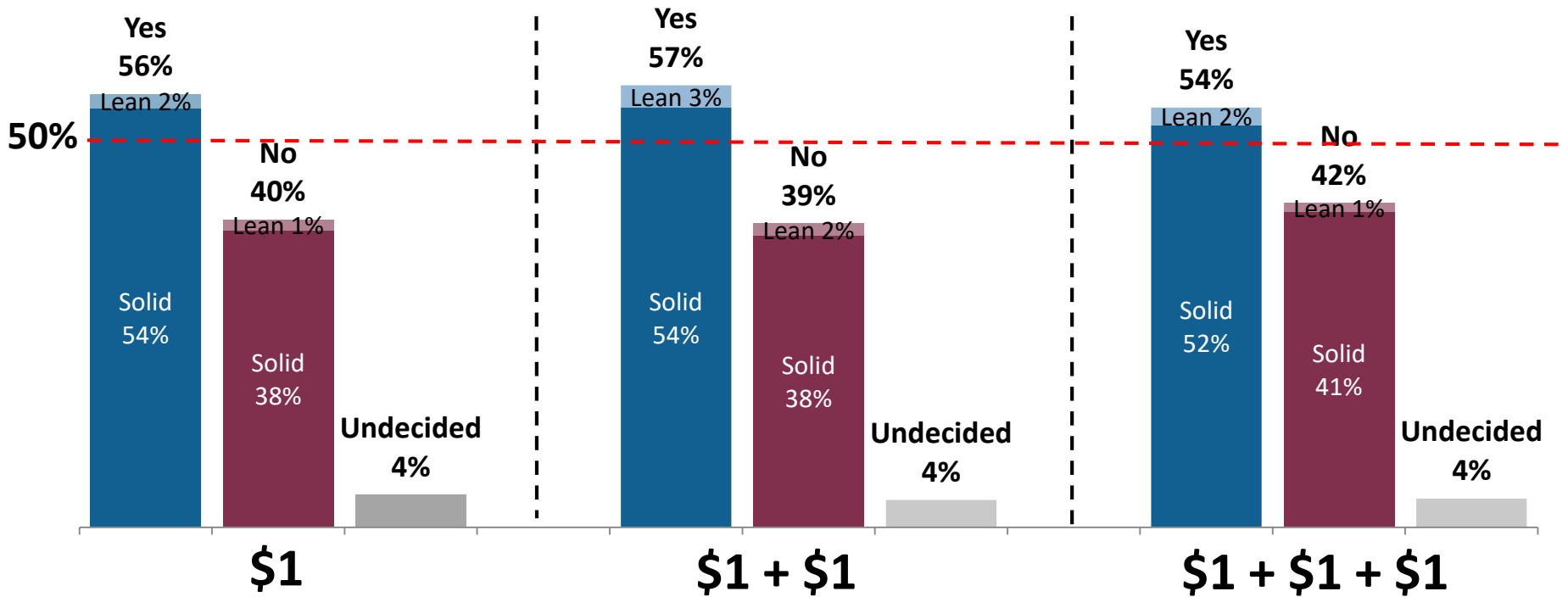
(\$1 + \$1 + \$1)

with a \$1 toll increase effective in 2019, a \$1 increase in 2023, and a \$1 increase in 2027,

on all Bay Area toll bridges except the Golden Gate Bridge, with independent oversight and all funds staying in the Bay Area?

Bay Area Regional Traffic Relief Plan: Initial Vote

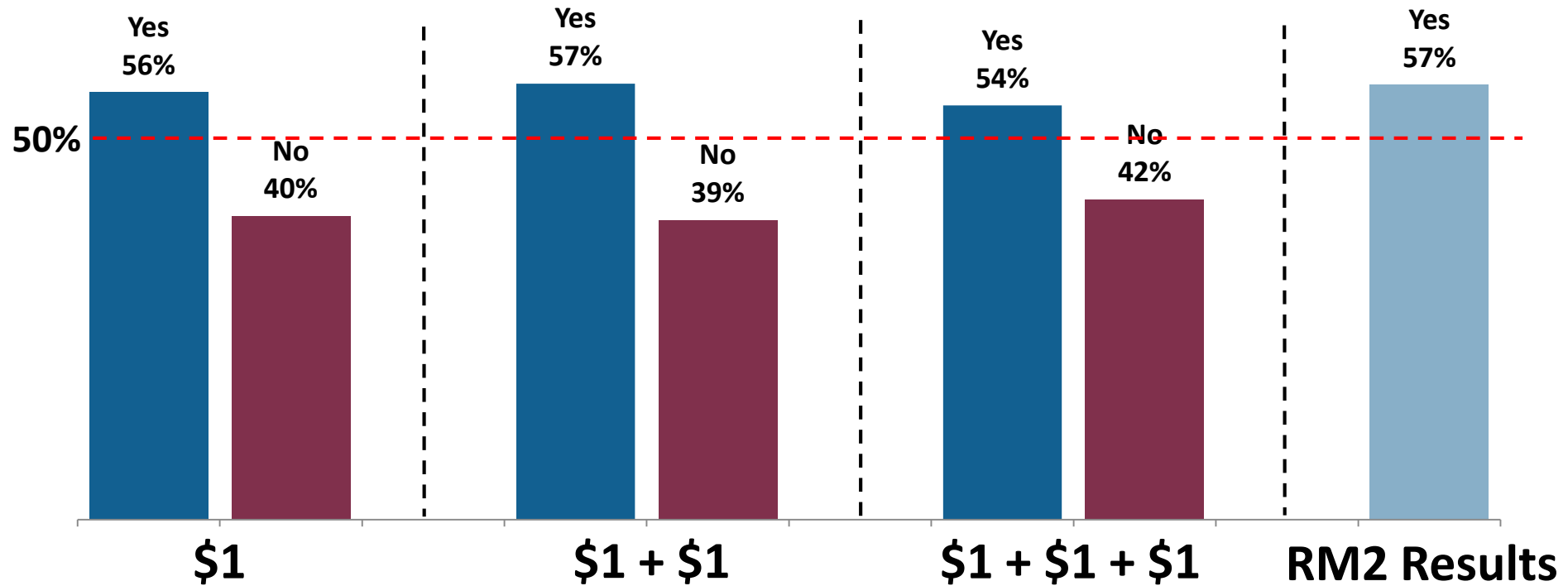
Support for the first and second options is nearly identical; support for the third option is only slightly lower.



Q7. If the election were held today, would you vote yes to approve or no to reject this measure?

Bay Area Regional Traffic Relief Plan: RM2 Comparison

Support for all three proposals is similar to the actual vote on Regional Measure 2.

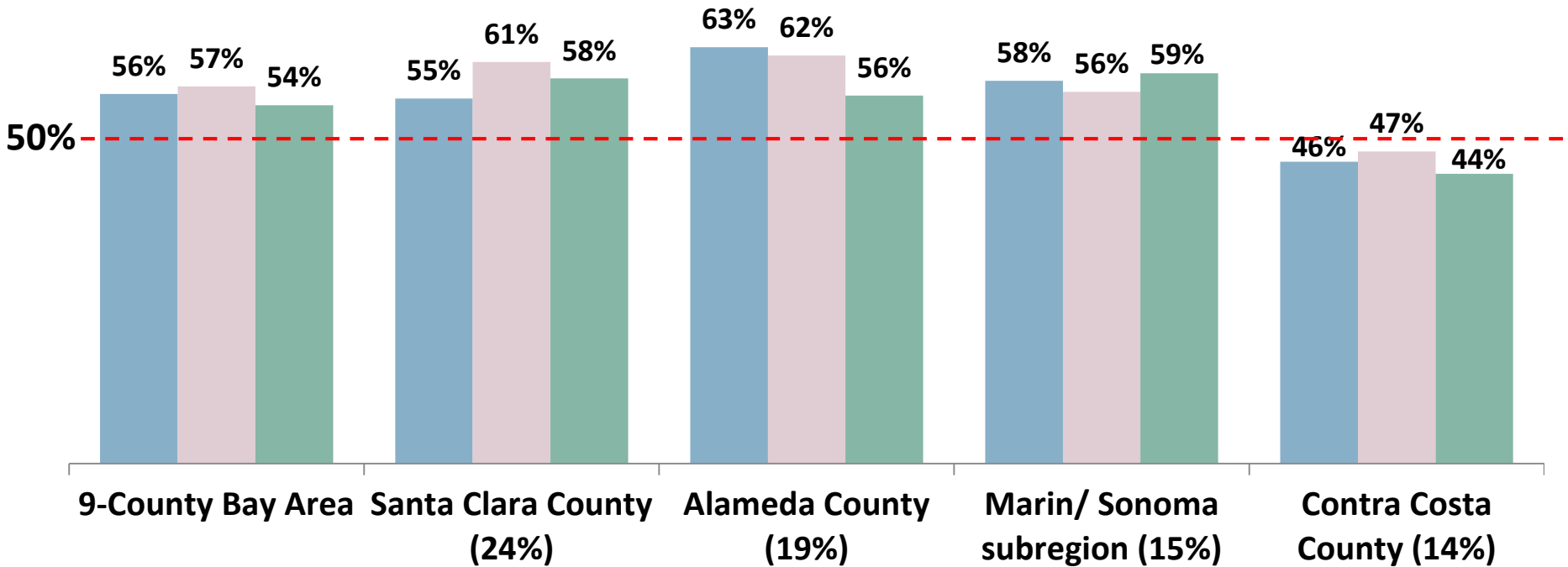


Q7. If the election were held today, would you vote yes to approve or no to reject this measure?

RM3 Initial Vote by County

Support falls below a majority in Contra Costa County.

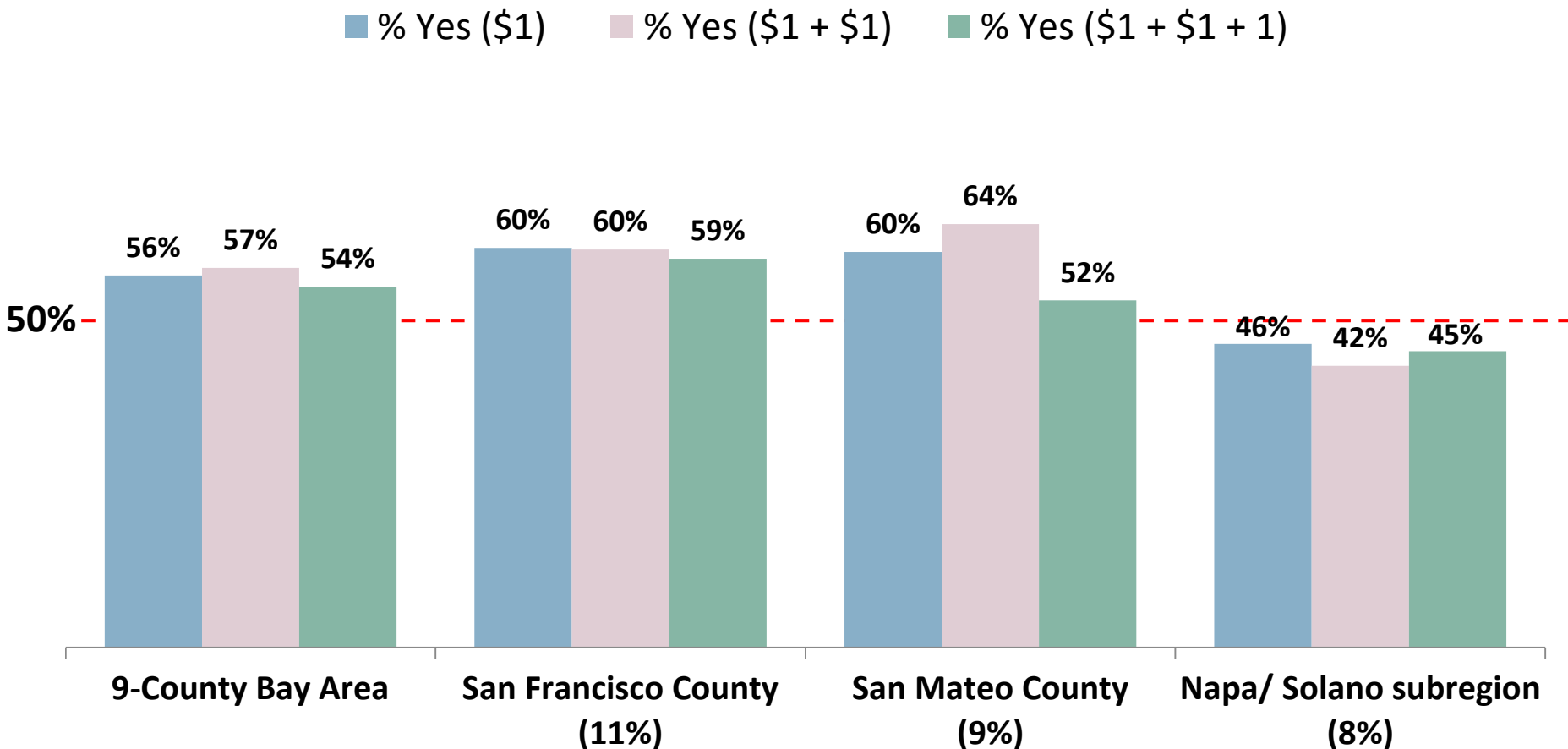
■ % Yes (\$1) ■ % Yes (\$1 + \$1) ■ % Yes (\$1 + \$1 + 1)



Q7. If the election were held today, would you vote yes to approve or no to reject this measure?

RM3 Initial Vote by County

Support for both the \$1 and \$1 + \$1 measures is high in San Mateo County. Support is similar for each measure in San Francisco County.

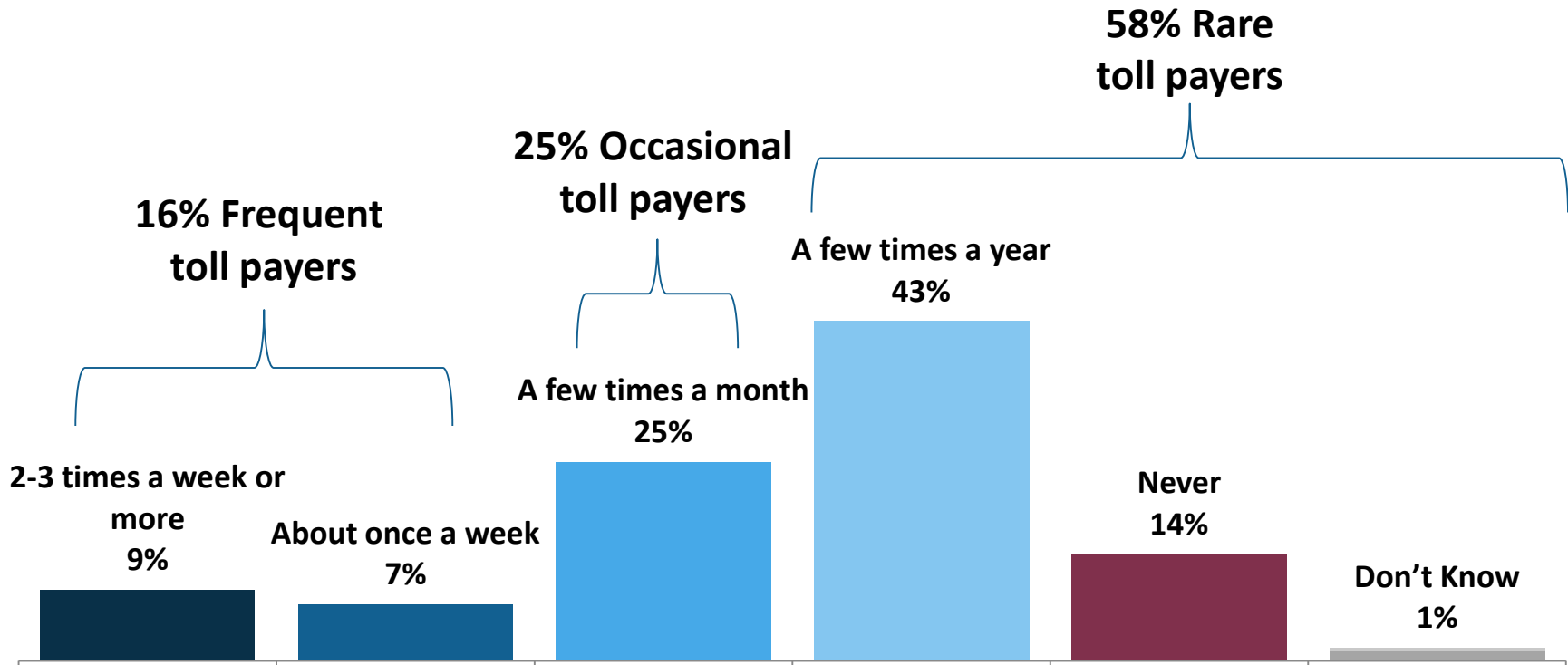


Q7. If the election were held today, would you vote yes to approve or no to reject this measure?

Frequency of Toll Bridge Usage

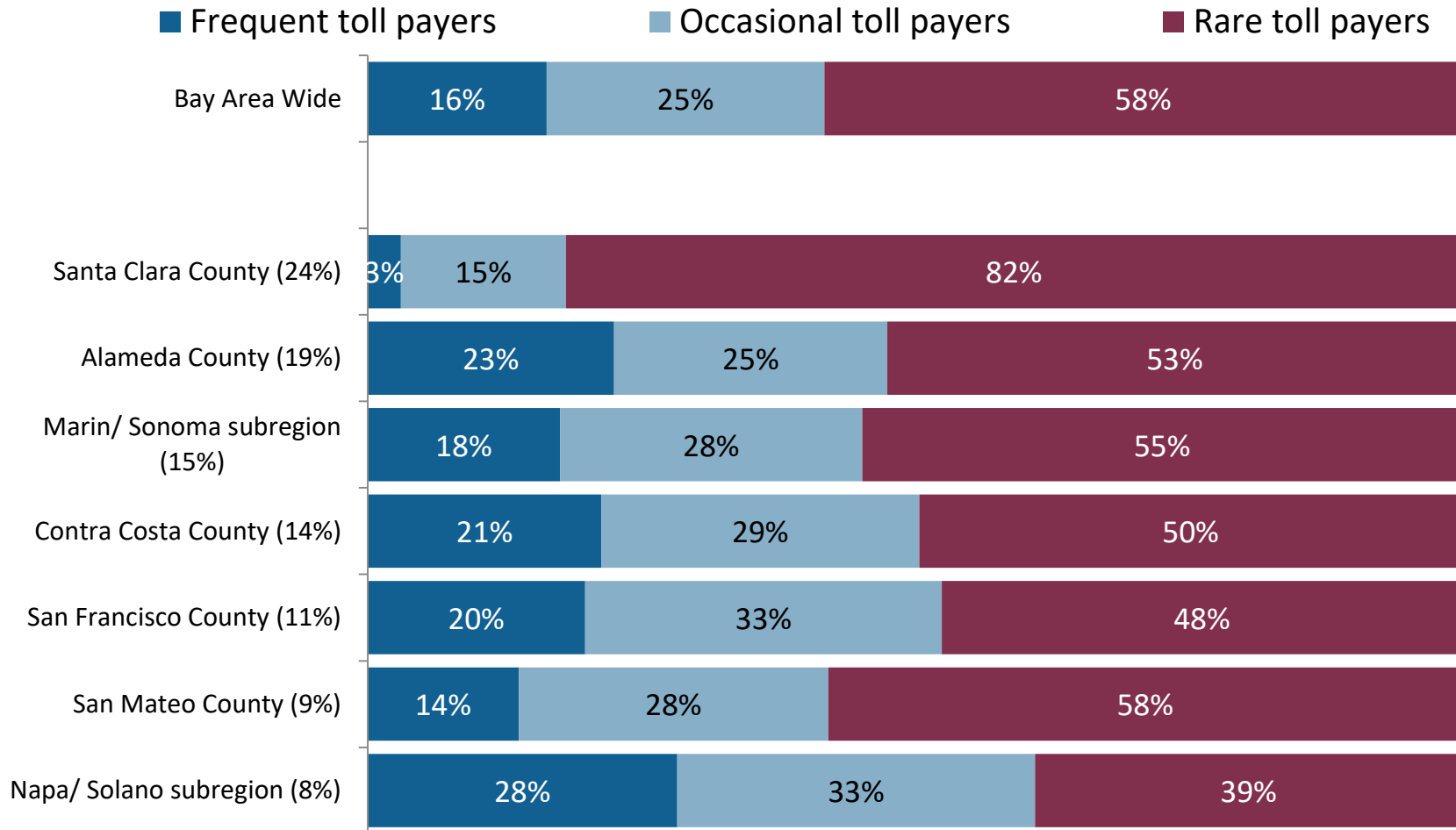
16% drive across a toll bridge at least once a week. About half rarely drive across a toll bridge.

How often do you drive across a Bay Area toll bridge, not including the Golden Gate Bridge?



Bridge User Demographics

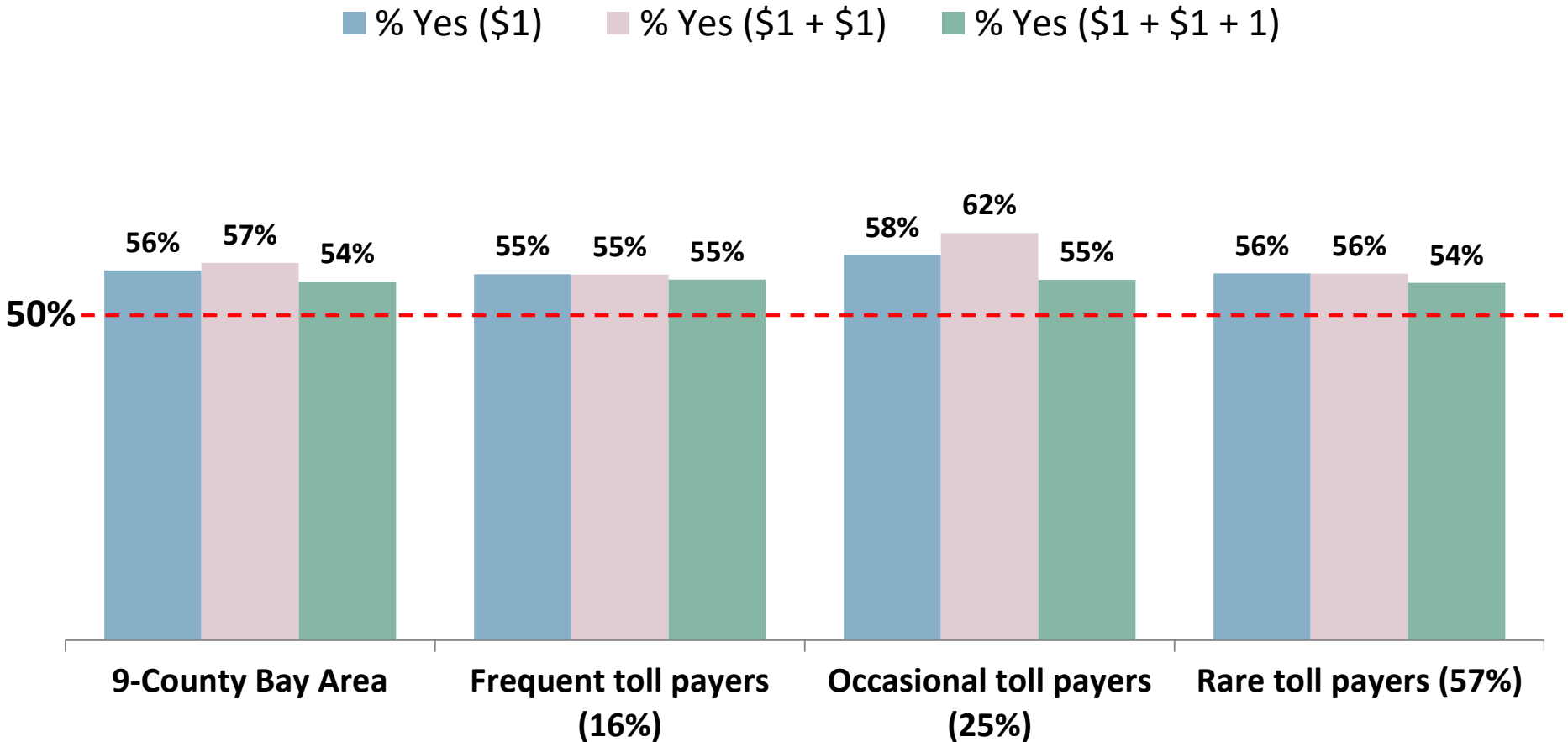
Santa Clara County voters report the lowest level of bridge usership; those in the Napa/ Solano subregion use bridges the most.



Q46. How often do you drive across a Bay Area toll bridge, not including the Golden Gate Bridge?

RM3 Initial Vote by Bridge Usership

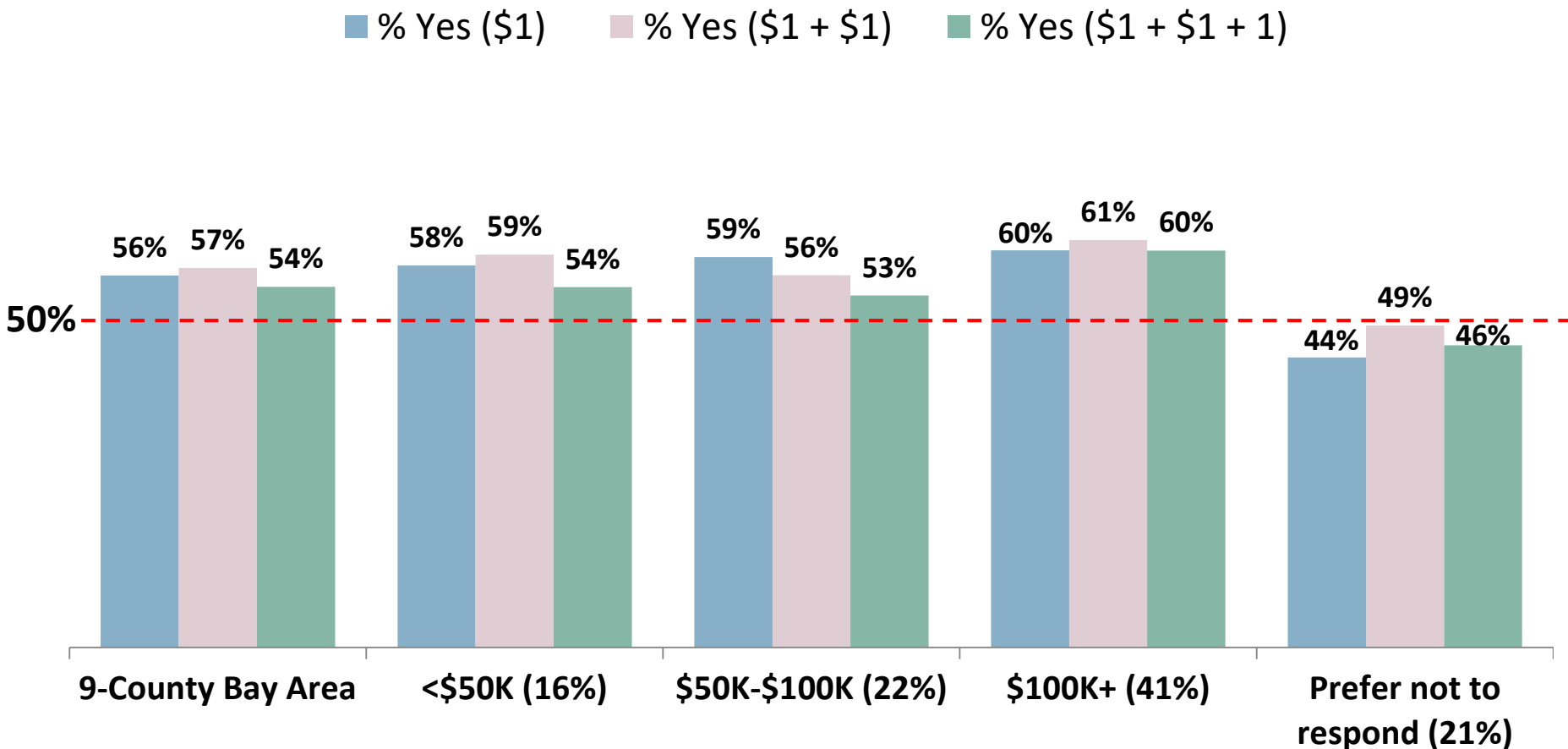
Frequent toll payers support the measure at a similar level as those who cross the bridge less frequently.



Q7. If the election were held today, would you vote yes to approve or no to reject this measure?

RM3 Initial Vote by Income

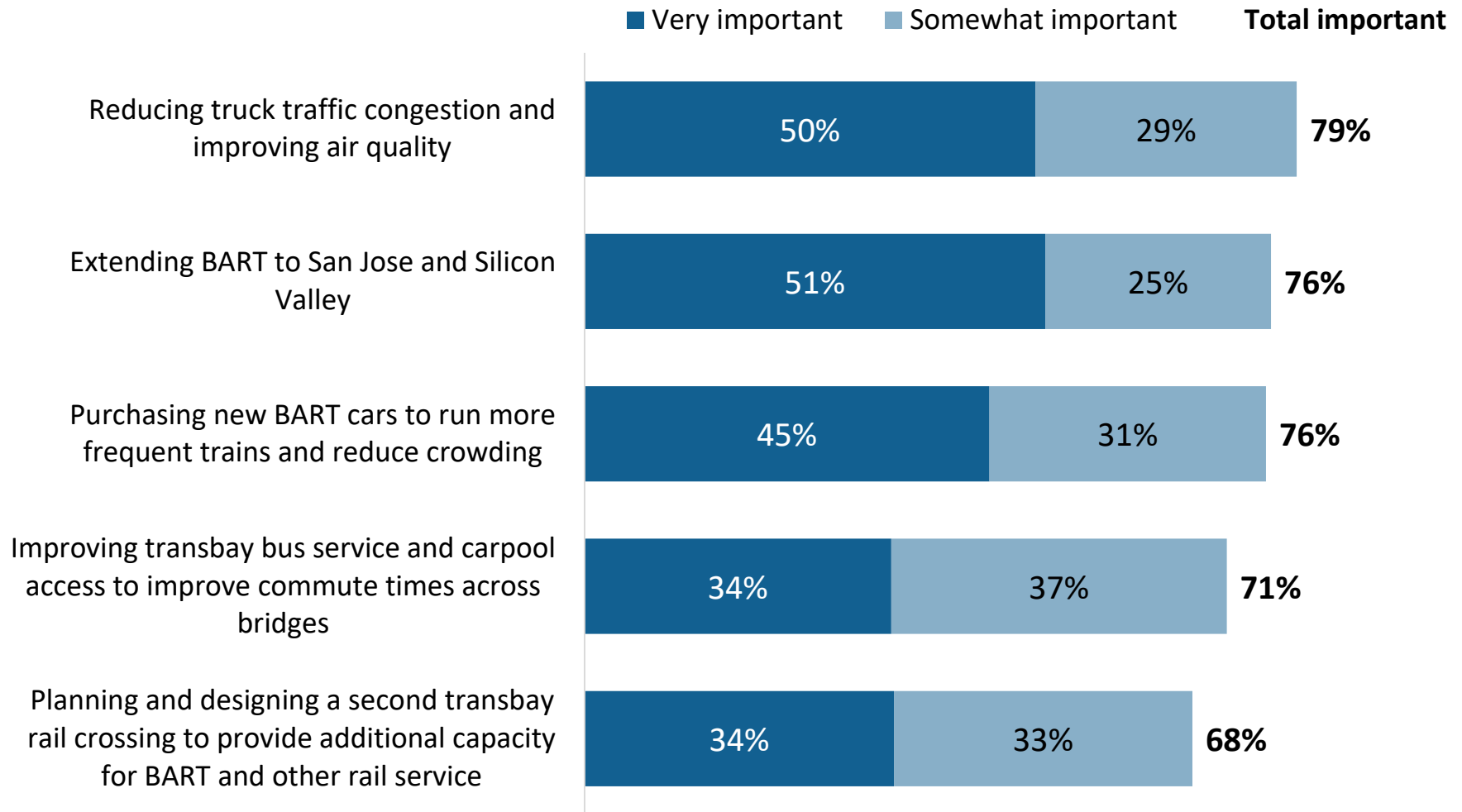
Among those who report their annual household income, support is above a majority for all three proposals across income brackets.



Q7. If the election were held today, would you vote yes to approve or no to reject this measure?

Projects – Bay Area Wide

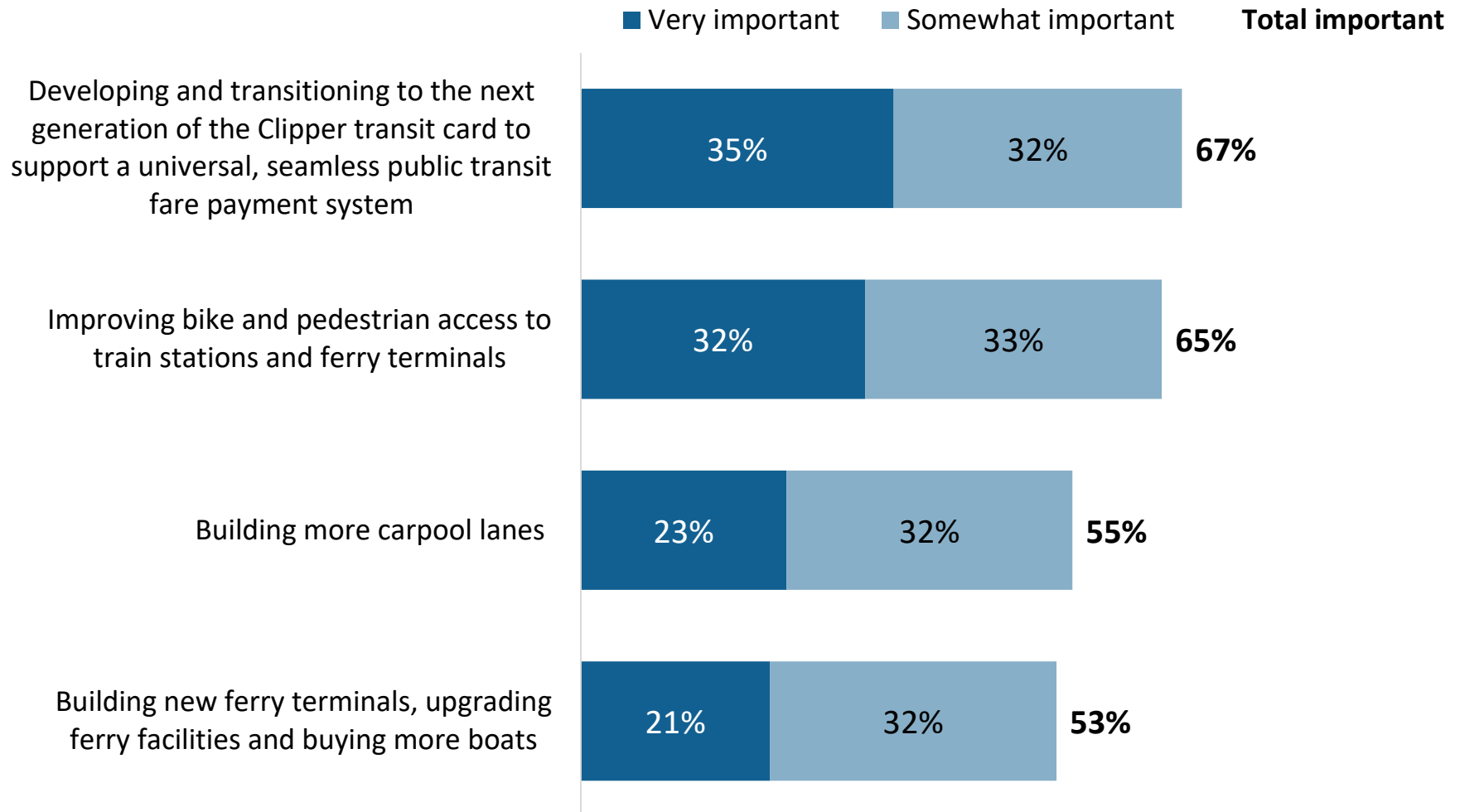
Projects involving BART make up three of the five top projects across the region.



Q8-16: Now I'd like to read you some specific projects that would be funded by the Bay Area Regional Traffic Relief Plan. After each one, please tell me whether that project is very important, somewhat important, not too important, or not at all important to you.

Projects – Bay Area Wide

Other Bay Area wide projects have less intense support.

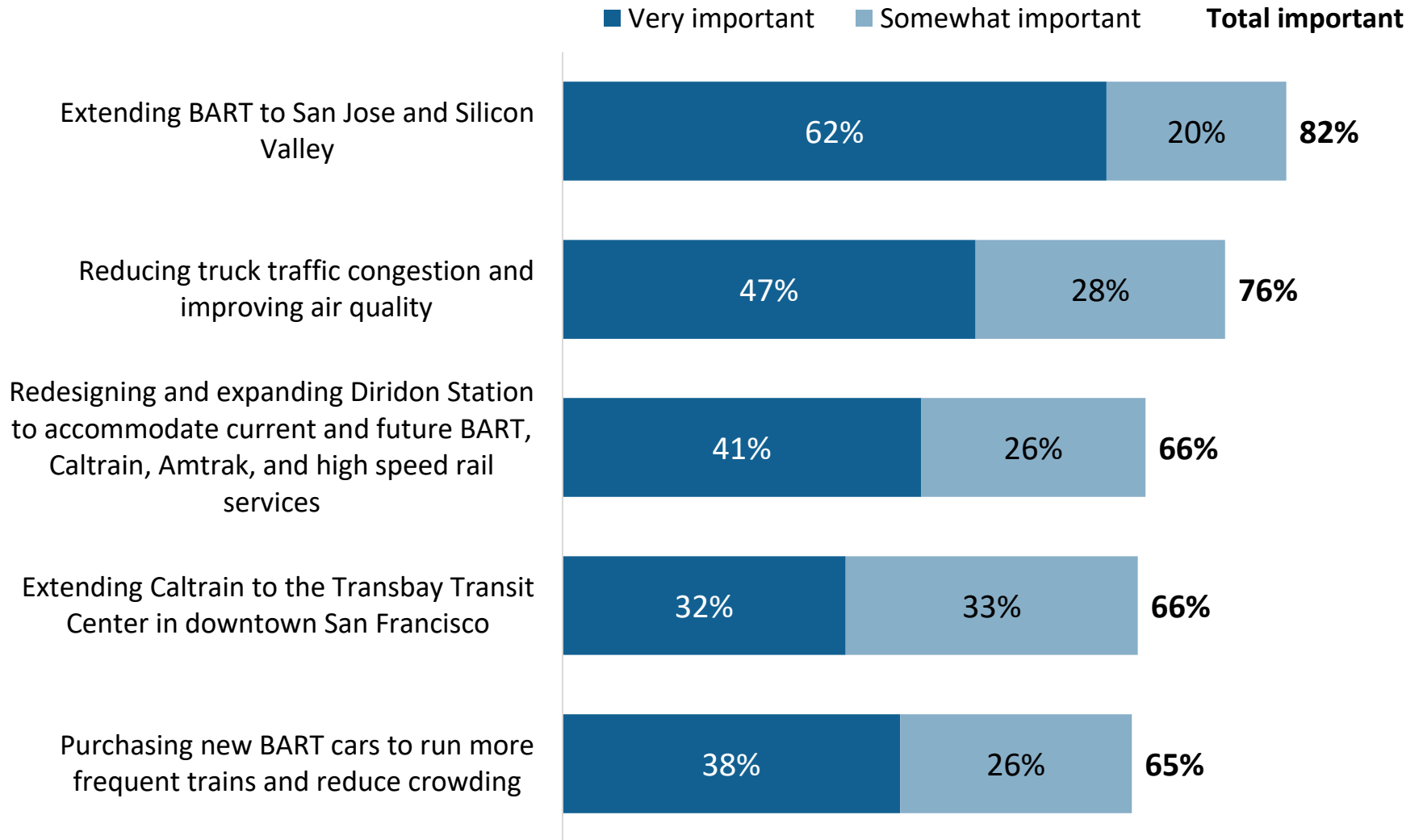


Q8-16: Now I'd like to read you some specific projects that would be funded by the Bay Area Regional Traffic Relief Plan. After each one, please tell me whether that project is very important, somewhat important, not too important, or not at all important to you.

All Projects in Santa Clara County (24% of Bay Area)

	Very important	Somewhat important	Total important
Extending BART to San Jose and Silicon Valley	62%	20%	82%
Reducing truck traffic congestion and improving air quality	47%	28%	76%
Redesigning and expanding Diridon Station to accommodate current and future BART, Caltrain, Amtrak, and high speed rail services	41%	26%	66%
Extending Caltrain to the Transbay Transit Center in downtown San Francisco	32%	33%	66%
Purchasing new BART cars to run more frequent trains and reduce crowding	38%	26%	65%
Improving bike and pedestrian access to train stations and ferry terminals	33%	32%	65%
Improving transbay bus service and carpool access to improve commute times across bridges	28%	35%	63%
Planning and designing a second transbay rail crossing to provide additional capacity for BART and other rail service	30%	31%	62%
Developing and transitioning to the next generation of the Clipper transit card to support a universal, seamless public transit fare payment system	31%	30%	62%
Improving travel time in the Dumbarton Bridge corridor through better transit options and highway improvements	23%	37%	60%
Improving Amtrak Capitol Corridor service by reducing travel times and improving system safety	31%	27%	57%
Making improvements to the interchange of Highway 101 and State Route 92 in San Mateo County	23%	33%	57%
Extending Santa Clara Valley Transportation Authority light rail from the Alum Rock station to the Eastridge Transit Center	24%	28%	52%
Building more carpool lanes	26%	27%	52%
Building new ferry terminals, upgrading ferry facilities and buying more boats	13%	25%	38%

Top Projects in Santa Clara County (24% of Bay Area)

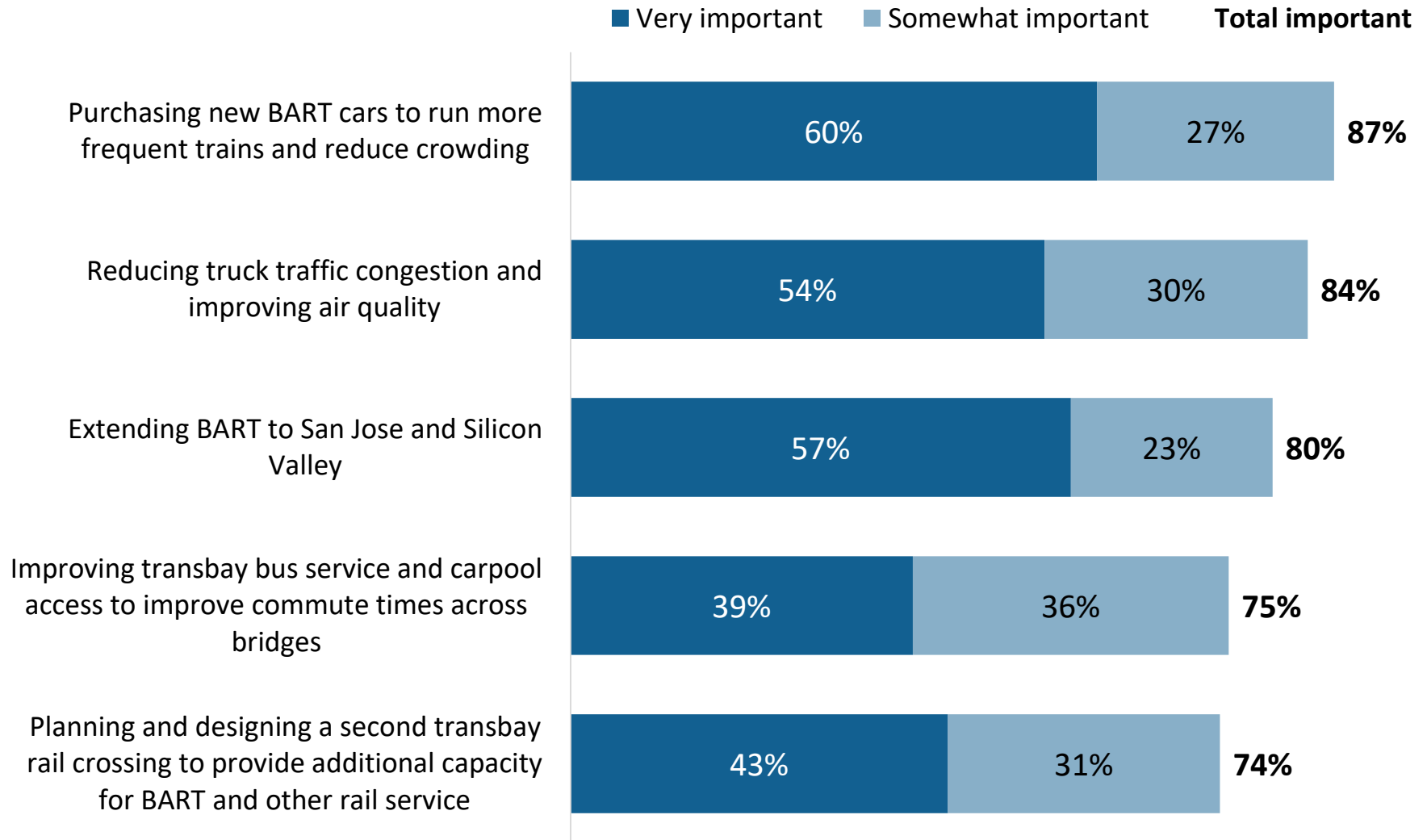


Q8-16: Now I'd like to read you some specific projects that would be funded by the Bay Area Regional Traffic Relief Plan. After each one, please tell me whether that project is very important, somewhat important, not too important, or not at all important to you.

All Projects in Alameda County (19% of Bay Area)

	Very important	Somewhat important	Total important
Purchasing new BART cars to run more frequent trains and reduce crowding	60%	27%	87%
Reducing truck traffic congestion and improving air quality	54%	30%	84%
Extending BART to San Jose and Silicon Valley	57%	23%	80%
Improving transbay bus service and carpool access to improve commute times across bridges	39%	36%	75%
Planning and designing a second transbay rail crossing to provide additional capacity for BART and other rail service	43%	31%	74%
Purchasing AC Transit buses and making other improvements to reduce travel times and increase service frequency along key corridors	38%	35%	73%
Developing and transitioning to the next generation of the Clipper transit card to support a universal, seamless public transit fare payment system	38%	32%	70%
Expanding express bus service in the Bay Bridge corridor	33%	35%	68%
Improving bike and pedestrian access to train stations and ferry terminals	34%	32%	65%
Improving safety and reducing congestion at the Interstate 680/State Route 84 interchange	32%	33%	65%
Improving travel time in the Dumbarton Bridge corridor through better transit options and highway improvements	30%	34%	64%
Improving Amtrak Capitol Corridor service by reducing travel times and improving system safety	30%	32%	62%
Building more carpool lanes	23%	33%	57%
Building new ferry terminals, upgrading ferry facilities and buying more boats	23%	33%	56%
Making improvements to the interchange of Highway 101 and State Route 92 in San Mateo County	24%	31%	55%

Top Projects in Alameda County (19% of Bay Area)

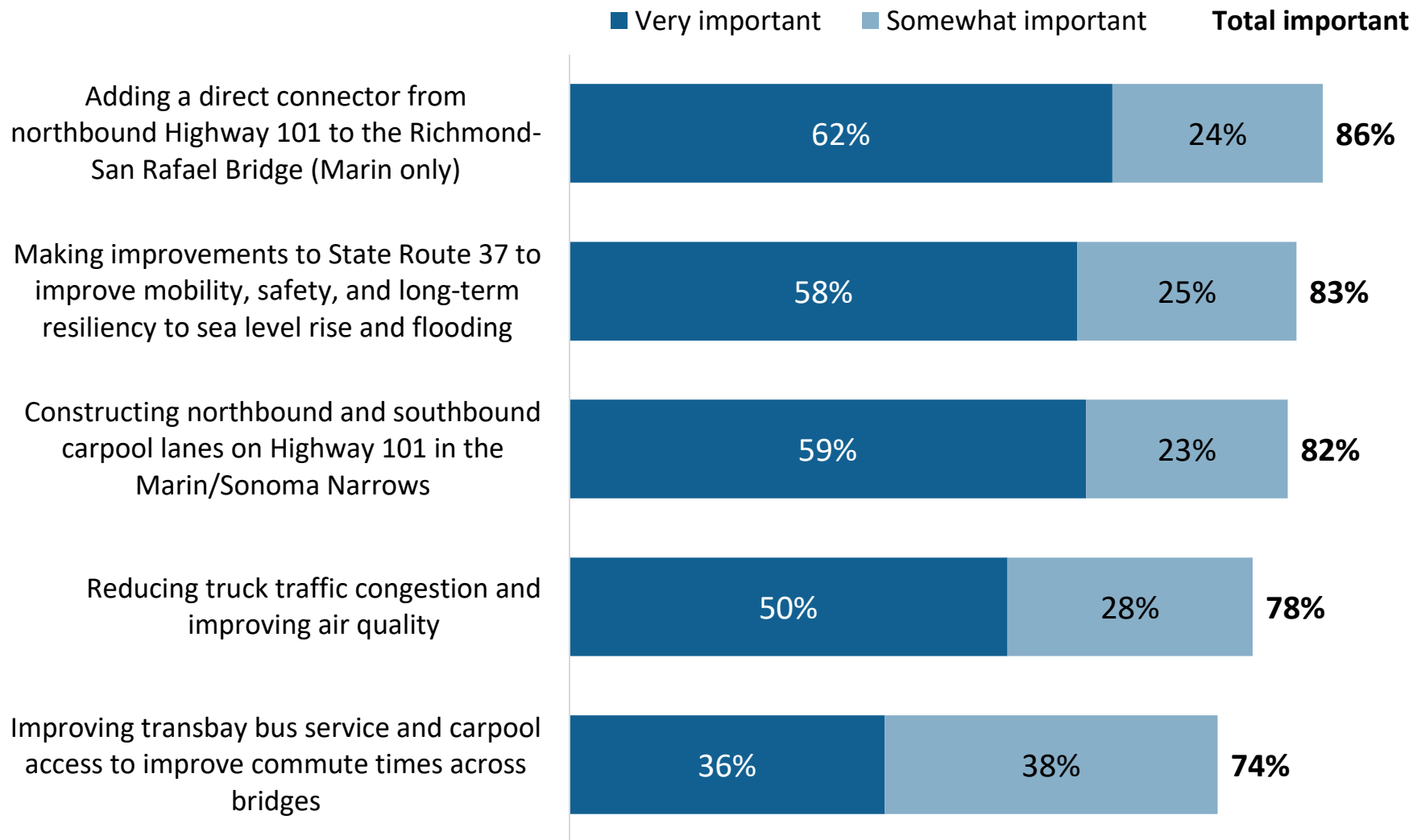


Q8-16: Now I'd like to read you some specific projects that would be funded by the Bay Area Regional Traffic Relief Plan. After each one, please tell me whether that project is very important, somewhat important, not too important, or not at all important to you.

All Projects in Marin/ Sonoma Subregion (15% of Bay Area)

	Very important	Somewhat important	Total important
Adding a direct connector from northbound Highway 101 to the Richmond-San Rafael Bridge (Marin only)	62%	24%	86%
Making improvements to State Route 37 to improve mobility, safety, and long-term resiliency to sea level rise and flooding	58%	25%	83%
Constructing northbound and southbound carpool lanes on Highway 101 in the Marin/Sonoma Narrows	59%	23%	82%
Reducing truck traffic congestion and improving air quality	50%	28%	78%
Improving transbay bus service and carpool access to improve commute times across bridges	36%	38%	74%
Extending the SMART or Sonoma-Marín Area Rail Transit system to Windsor and Healdsburg	43%	27%	70%
Replacing and modernizing the San Rafael Transit Center in downtown San Rafael to improve SMART train access (Marin only)	31%	36%	67%
Making improvements to the Richmond-San Rafael Bridge toll plaza and the Richmond Parkway interchange on Highway 580 (Marin only)	38%	29%	67%
Improving bike and pedestrian access to train stations and ferry terminals	35%	31%	67%
Purchasing new BART cars to run more frequent trains and reduce crowding	31%	36%	66%
Extending BART to San Jose and Silicon Valley	35%	28%	63%
Planning and designing a second transbay rail crossing to provide additional capacity for BART and other rail service	30%	33%	63%
Developing and transitioning to the next generation of the Clipper transit card to support a universal, seamless public transit fare payment system	33%	29%	62%
Building new ferry terminals, upgrading ferry facilities and buying more boats	24%	35%	58%
Building more carpool lanes	22%	35%	58%
Making improvements along State Route 29 including Soscol Junction (Sonoma only)	11%	23%	33%

Top Projects in Marin/ Sonoma Subregion (15% of Bay Area)

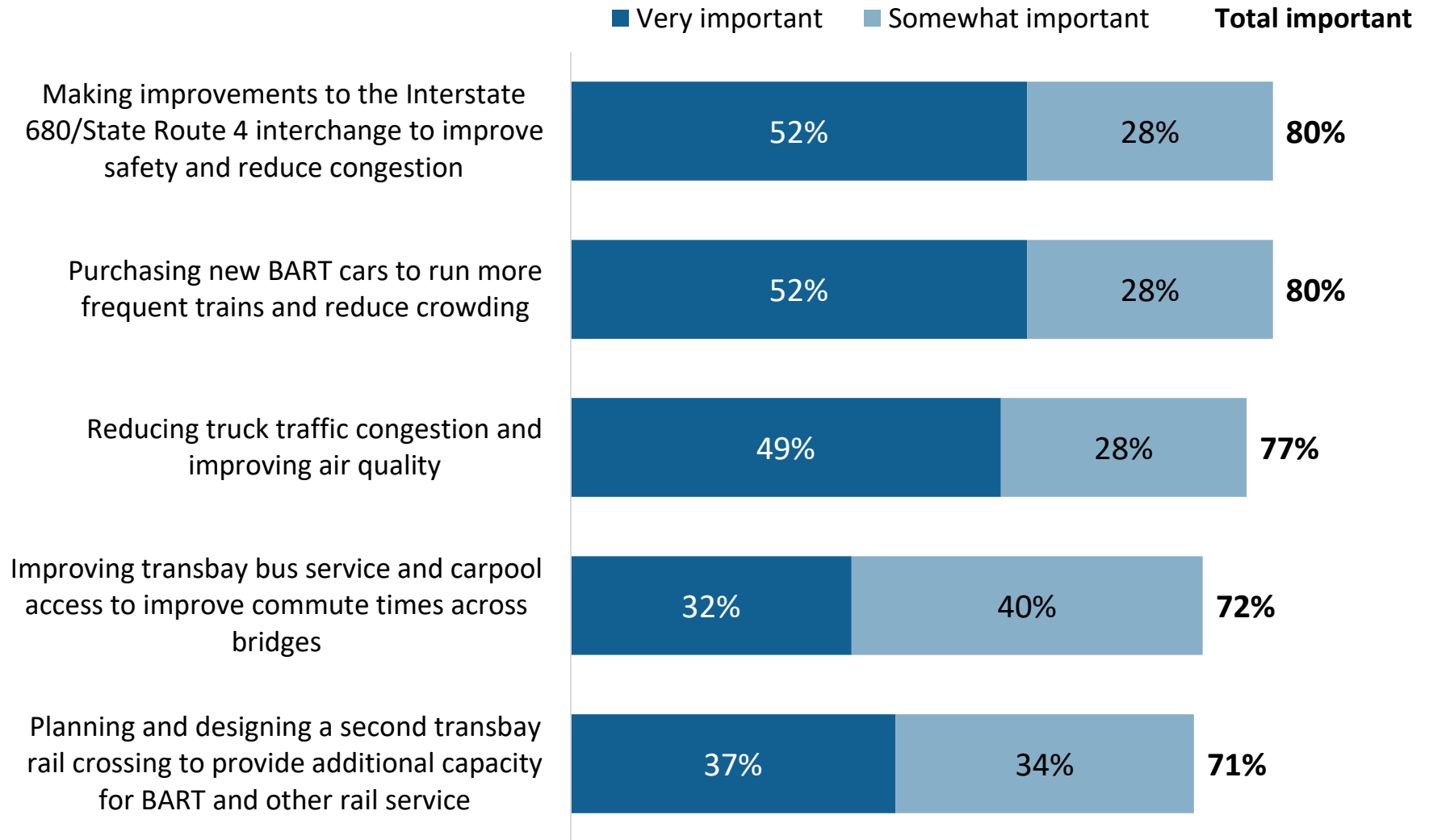


Q8-16: Now I'd like to read you some specific projects that would be funded by the Bay Area Regional Traffic Relief Plan. After each one, please tell me whether that project is very important, somewhat important, not too important, or not at all important to you.

All Projects in Contra Costa County (14% of Bay Area)

	Very important	Somewhat important	Total important
Making improvements to the Interstate 680/State Route 4 interchange to improve safety and reduce congestion	52%	28%	80%
Purchasing new BART cars to run more frequent trains and reduce crowding	52%	28%	80%
Reducing truck traffic congestion and improving air quality	49%	28%	77%
Improving transbay bus service and carpool access to improve commute times across bridges	32%	40%	72%
Planning and designing a second transbay rail crossing to provide additional capacity for BART and other rail service	37%	34%	71%
Extending BART to San Jose and Silicon Valley	42%	28%	70%
Developing and transitioning to the next generation of the Clipper transit card to support a universal, seamless public transit fare payment system	35%	34%	69%
Purchasing AC Transit buses and making other improvements to reduce travel times and increase service frequency along key corridors	26%	39%	65%
Expanding express bus service in the Bay Bridge corridor	24%	35%	59%
Improving bike and pedestrian access to train stations and ferry terminals	26%	33%	59%
Improving Amtrak Capitol Corridor service by reducing travel times and improving system safety	25%	34%	58%
Improving safety and reducing congestion at the Interstate 680/State Route 84 interchange	30%	27%	57%
Building new ferry terminals, upgrading ferry facilities and buying more boats	24%	33%	56%
Making improvements to the Richmond-San Rafael Bridge toll plaza and the Richmond Parkway interchange on Highway 580	23%	33%	56%
Widening lanes and constructing a median safety barrier on Vasco Road	29%	24%	53%
Adding a direct connector from northbound Highway 101 to the Richmond-San Rafael Bridge	19%	33%	52%
Building more carpool lanes	18%	32%	50%

Top Projects in Contra Costa County (14% of Bay Area)

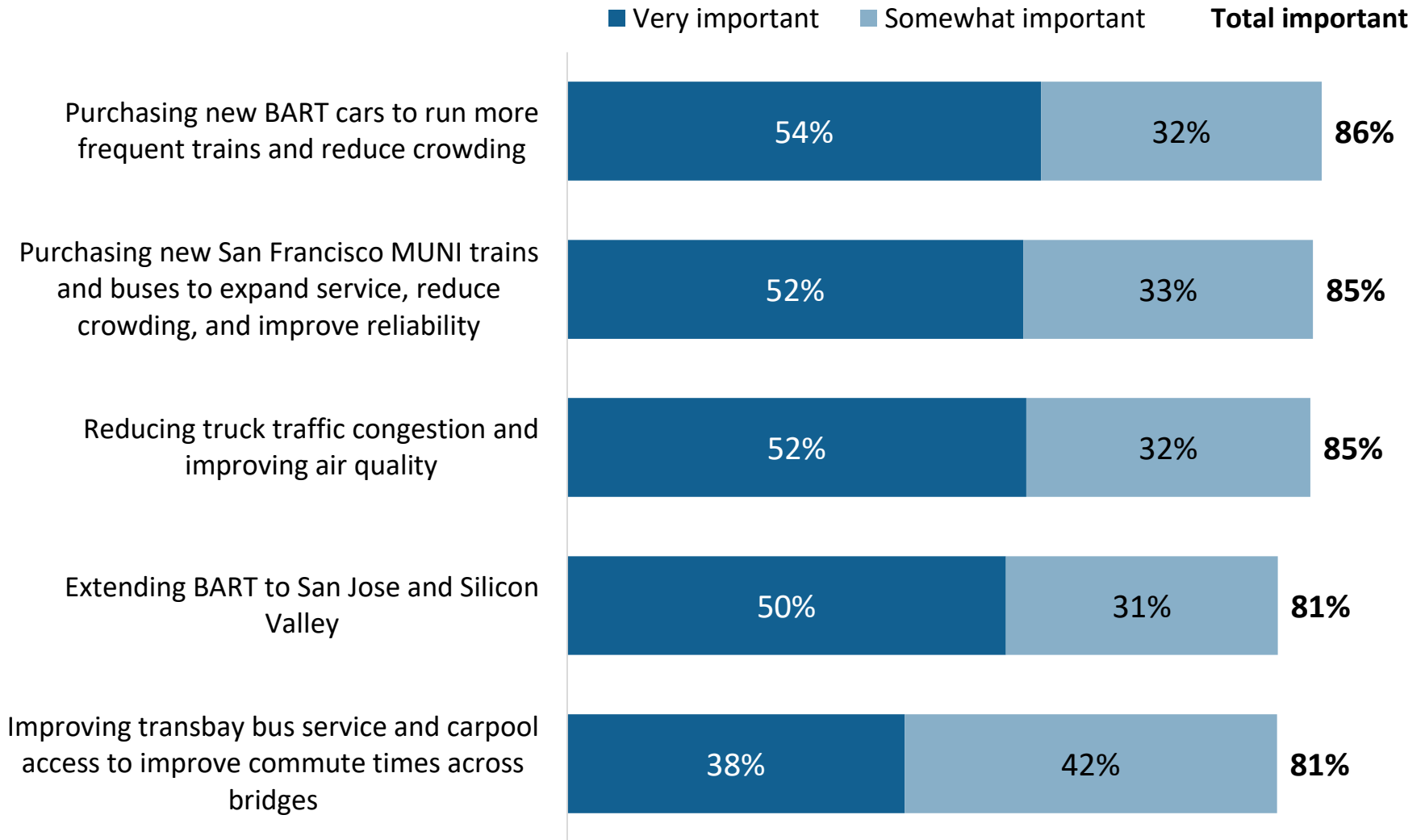


Q8-16: Now I'd like to read you some specific projects that would be funded by the Bay Area Regional Traffic Relief Plan. After each one, please tell me whether that project is very important, somewhat important, not too important, or not at all important to you.

All Projects in San Francisco County (11% of Bay Area)

	Very important	Somewhat important	Total important
Purchasing new BART cars to run more frequent trains and reduce crowding	54%	32%	86%
Purchasing new San Francisco MUNI trains and buses to expand service, reduce crowding, and improve reliability	52%	33%	85%
Reducing truck traffic congestion and improving air quality	52%	32%	85%
Extending BART to San Jose and Silicon Valley	50%	31%	81%
Improving transbay bus service and carpool access to improve commute times across bridges	38%	42%	81%
Developing and transitioning to the next generation of the Clipper transit card to support a universal, seamless public transit fare payment system	43%	35%	78%
Planning and designing a second transbay rail crossing to provide additional capacity for BART and other rail service	40%	36%	76%
Extending Caltrain to the Transbay Transit Center in downtown San Francisco	43%	31%	74%
Improving bike and pedestrian access to train stations and ferry terminals	31%	31%	63%
Building new ferry terminals, upgrading ferry facilities and buying more boats	22%	38%	60%
Building more carpool lanes	20%	37%	56%
Making improvements to the interchange of Highway 101 and State Route 92 in San Mateo County	21%	26%	48%

Top Projects in San Francisco County (11% of Bay Area)

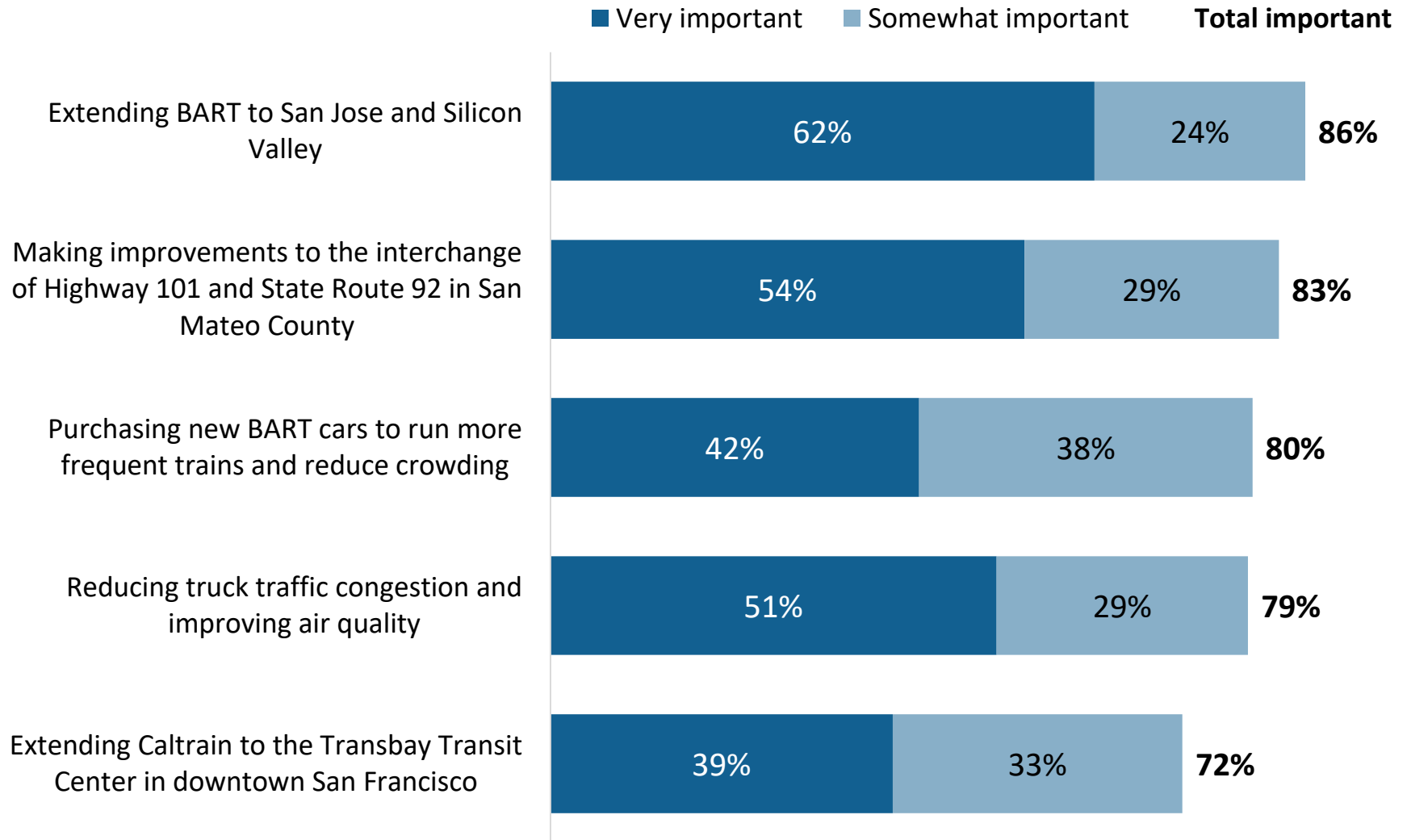


Q8-16: Now I'd like to read you some specific projects that would be funded by the Bay Area Regional Traffic Relief Plan. After each one, please tell me whether that project is very important, somewhat important, not too important, or not at all important to you.

All Projects in San Mateo County (9% of Bay Area)

	Very important	Somewhat important	Total important
Extending BART to San Jose and Silicon Valley	62%	24%	86%
Making improvements to the interchange of Highway 101 and State Route 92 in San Mateo County	54%	29%	83%
Purchasing new BART cars to run more frequent trains and reduce crowding	42%	38%	80%
Reducing truck traffic congestion and improving air quality	51%	29%	79%
Extending Caltrain to the Transbay Transit Center in downtown San Francisco	39%	33%	72%
Improving transbay bus service and carpool access to improve commute times across bridges	35%	37%	72%
Developing and transitioning to the next generation of the Clipper transit card to support a universal, seamless public transit fare payment system	38%	33%	71%
Improving bike and pedestrian access to train stations and ferry terminals	32%	38%	70%
Improving travel time in the Dumbarton Bridge corridor through better transit options and highway improvements	33%	34%	67%
Planning and designing a second transbay rail crossing to provide additional capacity for BART and other rail service	30%	36%	66%
Redesigning and expanding Diridon Station to accommodate current and future BART, Caltrain, Amtrak, and high speed rail services	28%	29%	57%
Building more carpool lanes	25%	30%	55%
Building new ferry terminals, upgrading ferry facilities and buying more boats	20%	31%	51%

Top Projects in San Mateo County (9% of Bay Area)

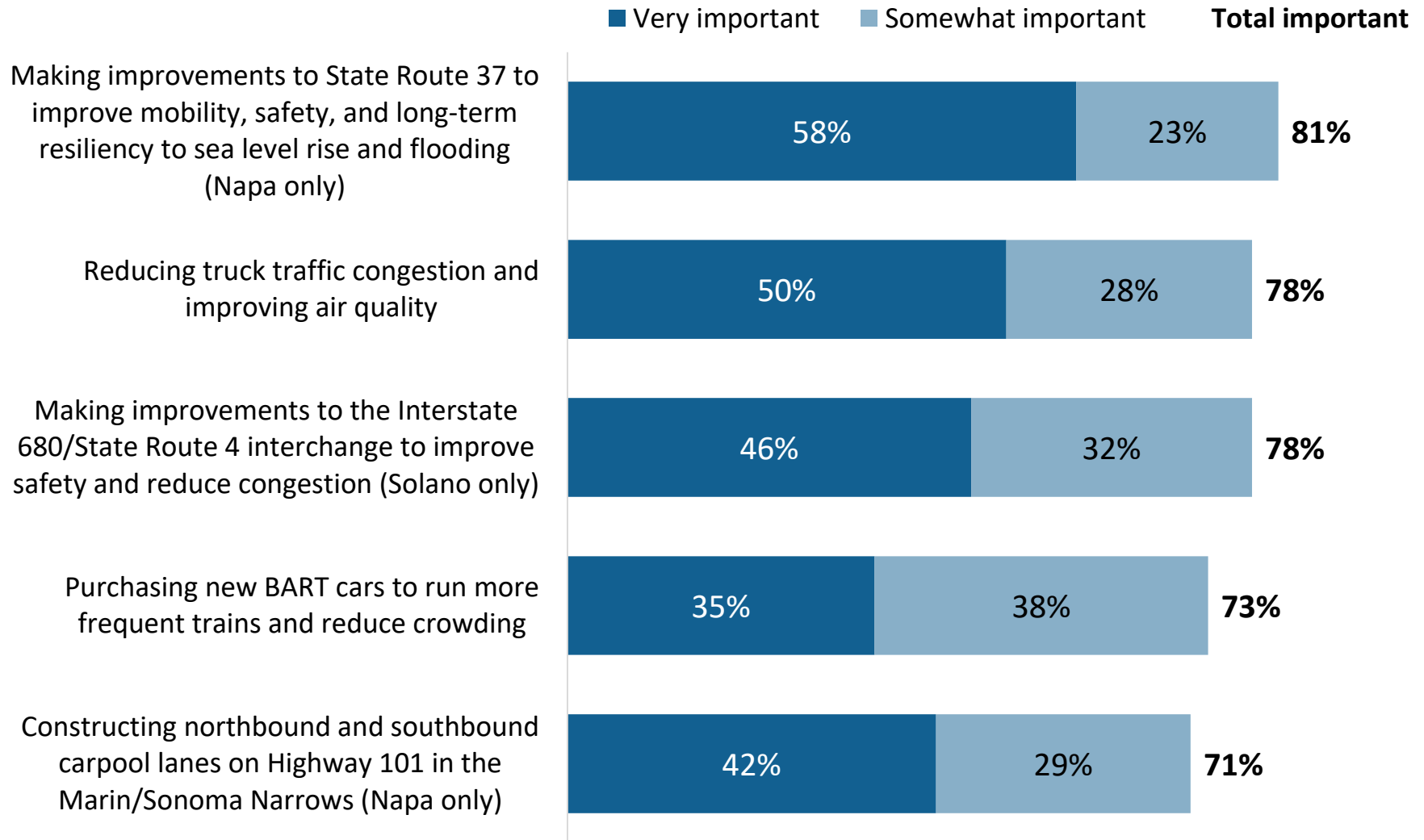


Q8-16: Now I'd like to read you some specific projects that would be funded by the Bay Area Regional Traffic Relief Plan. After each one, please tell me whether that project is very important, somewhat important, not too important, or not at all important to you.

All Projects in Napa/ Solano Subregion (8% of Bay Area)

	Very important	Somewhat important	Total important
Making improvements to State Route 37 to improve mobility, safety, and long-term resiliency to sea level rise and flooding (Napa only)	58%	23%	81%
Reducing truck traffic congestion and improving air quality	50%	28%	78%
Making improvements to the Interstate 680/State Route 4 interchange to improve safety and reduce congestion (Solano only)	46%	32%	78%
Purchasing new BART cars to run more frequent trains and reduce crowding	35%	38%	73%
Constructing northbound and southbound carpool lanes on Highway 101 in the Marin/Sonoma Narrows (Napa only)	42%	29%	71%
Improving transbay bus service and carpool access to improve commute times across bridges	34%	35%	69%
Extending BART to San Jose and Silicon Valley	42%	25%	66%
Building new ferry terminals, upgrading ferry facilities and buying more boats	32%	34%	66%
Constructing a Red Top Road interchange and a westbound Interstate 80 to southbound Interstate 680 connector	37%	28%	65%
Improving bike and pedestrian access to train stations and ferry terminals	27%	38%	65%
Improving Amtrak Capitol Corridor service by reducing travel times and improving system safety (Solano only)	34%	30%	64%
Planning and designing a second transbay rail crossing to provide additional capacity for BART and other rail service	28%	35%	62%
Extending the SMART or Sonoma-Marín Area Rail Transit system to Windsor and Healdsburg (Napa only)	31%	29%	61%
Making improvements along State Route 29 including Soscol Junction	36%	24%	60%
Developing and transitioning to the next generation of the Clipper transit card to support a universal, seamless public transit fare payment system	24%	32%	56%
Expanding express bus service in the Bay Bridge corridor (Solano only)	30%	25%	55%
Building more carpool lanes	25%	30%	55%

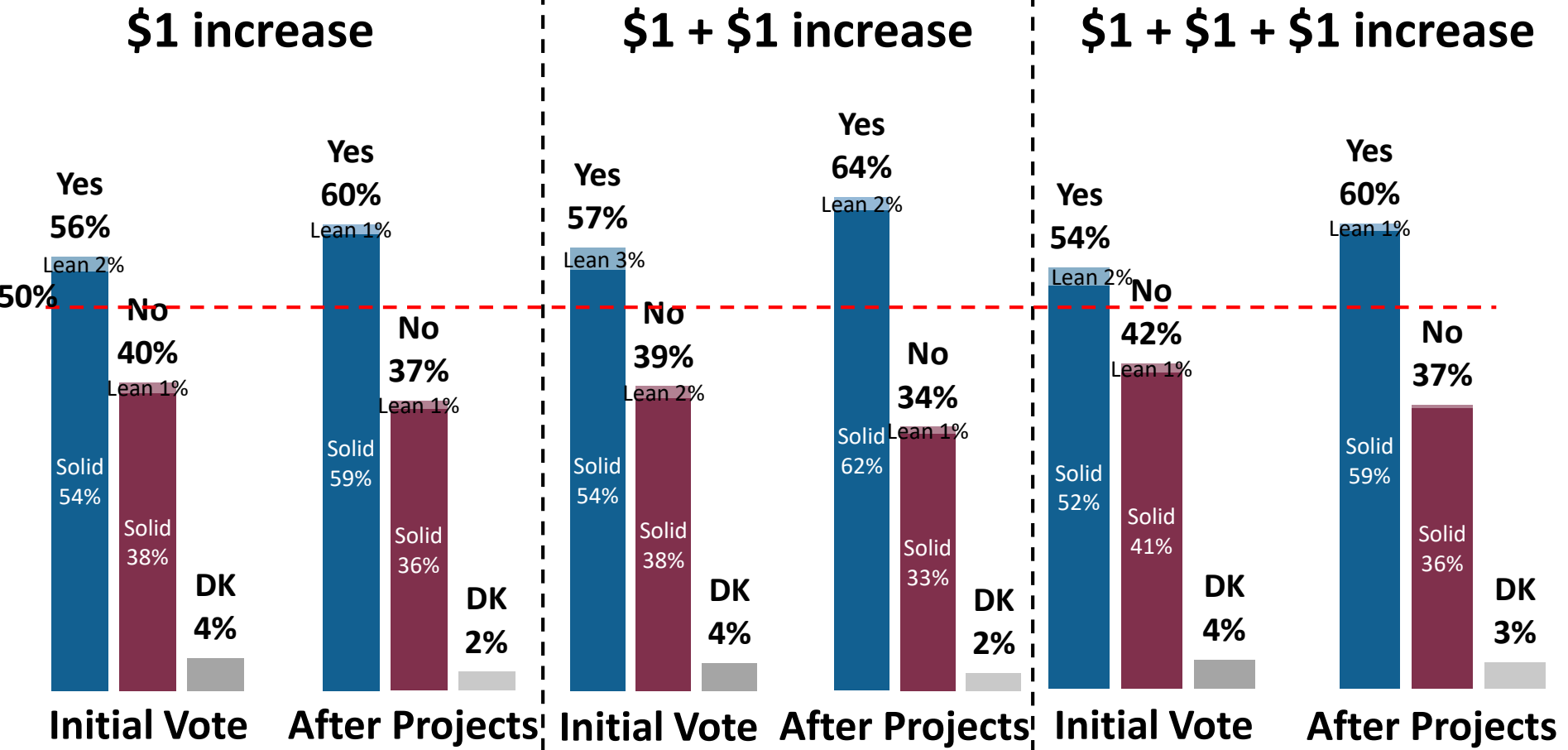
Top Projects in Napa/ Solano Subregion (8% of Bay Area)



Q8-16: Now I'd like to read you some specific projects that would be funded by the Bay Area Regional Traffic Relief Plan. After each one, please tell me whether that project is very important, somewhat important, not too important, or not at all important to you.

Bay Area Regional Traffic Relief Plan: After Projects

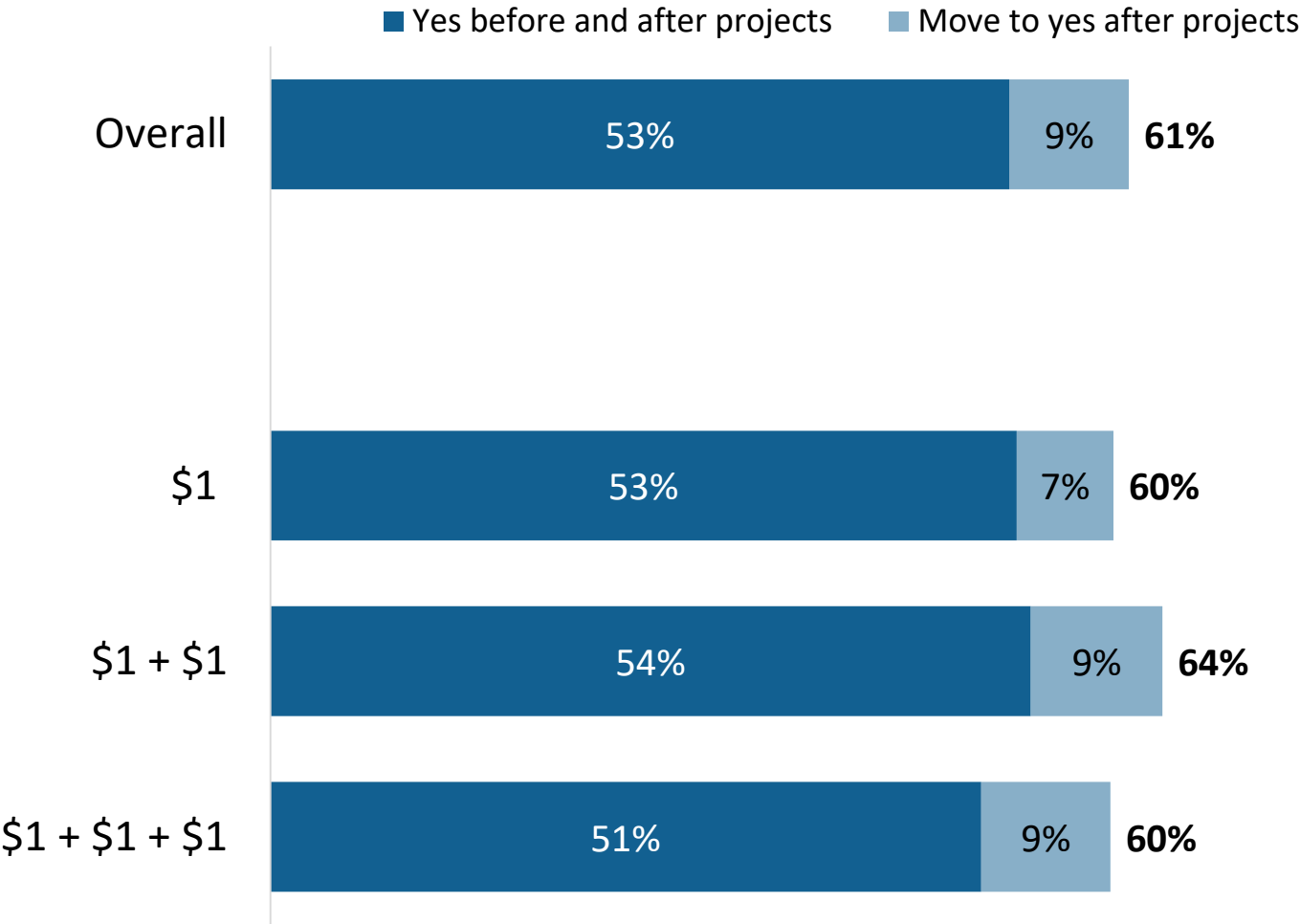
Support for the measure increases significantly after voters learn about the projects.



Q37. Now that you've heard a little more about what it would fund, would you vote yes to approve or no to reject a measure that reads...

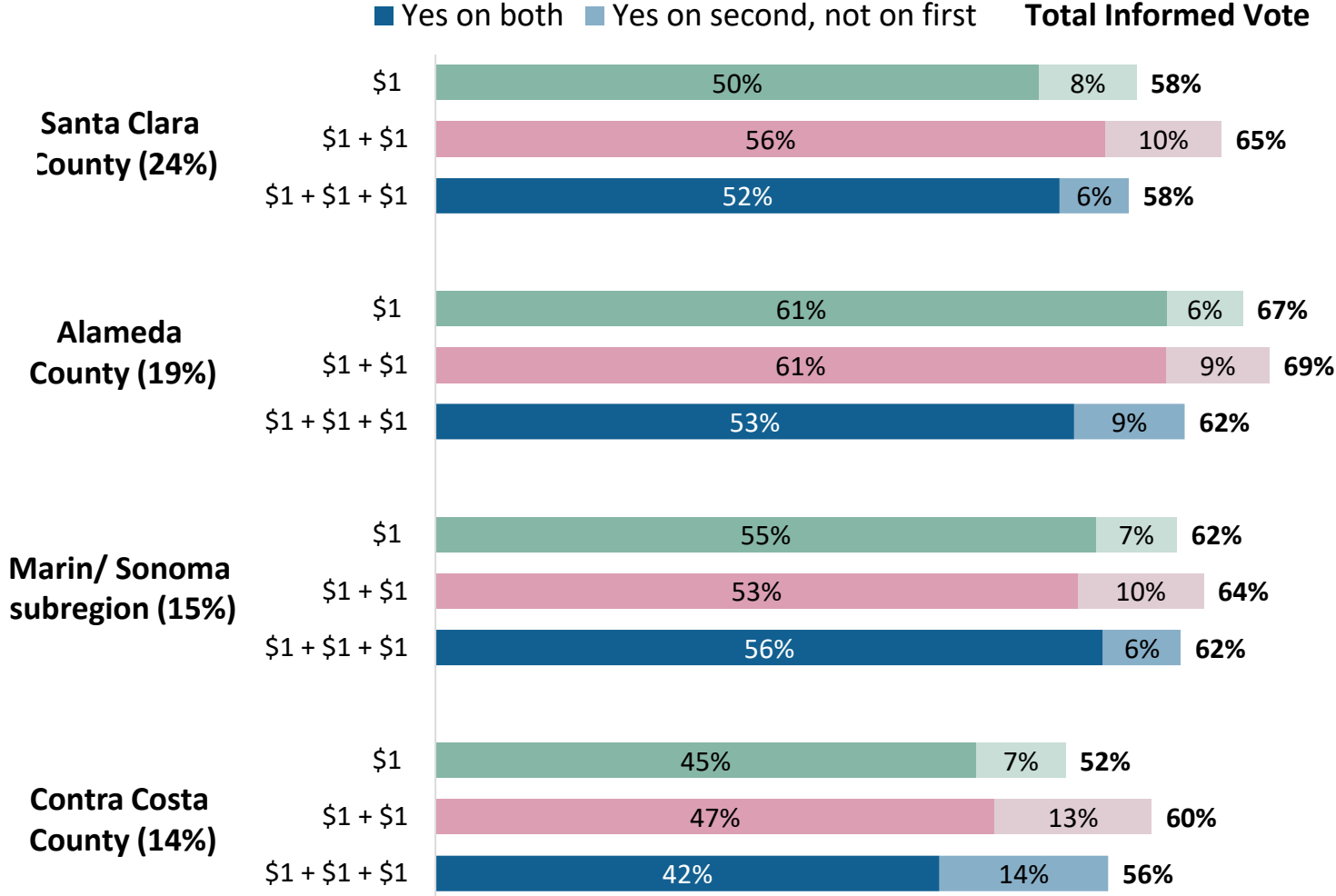
Change in Support

There is a small, but significant, percentage that are supportive after hearing information that were not supportive initially.



Change in Support by County

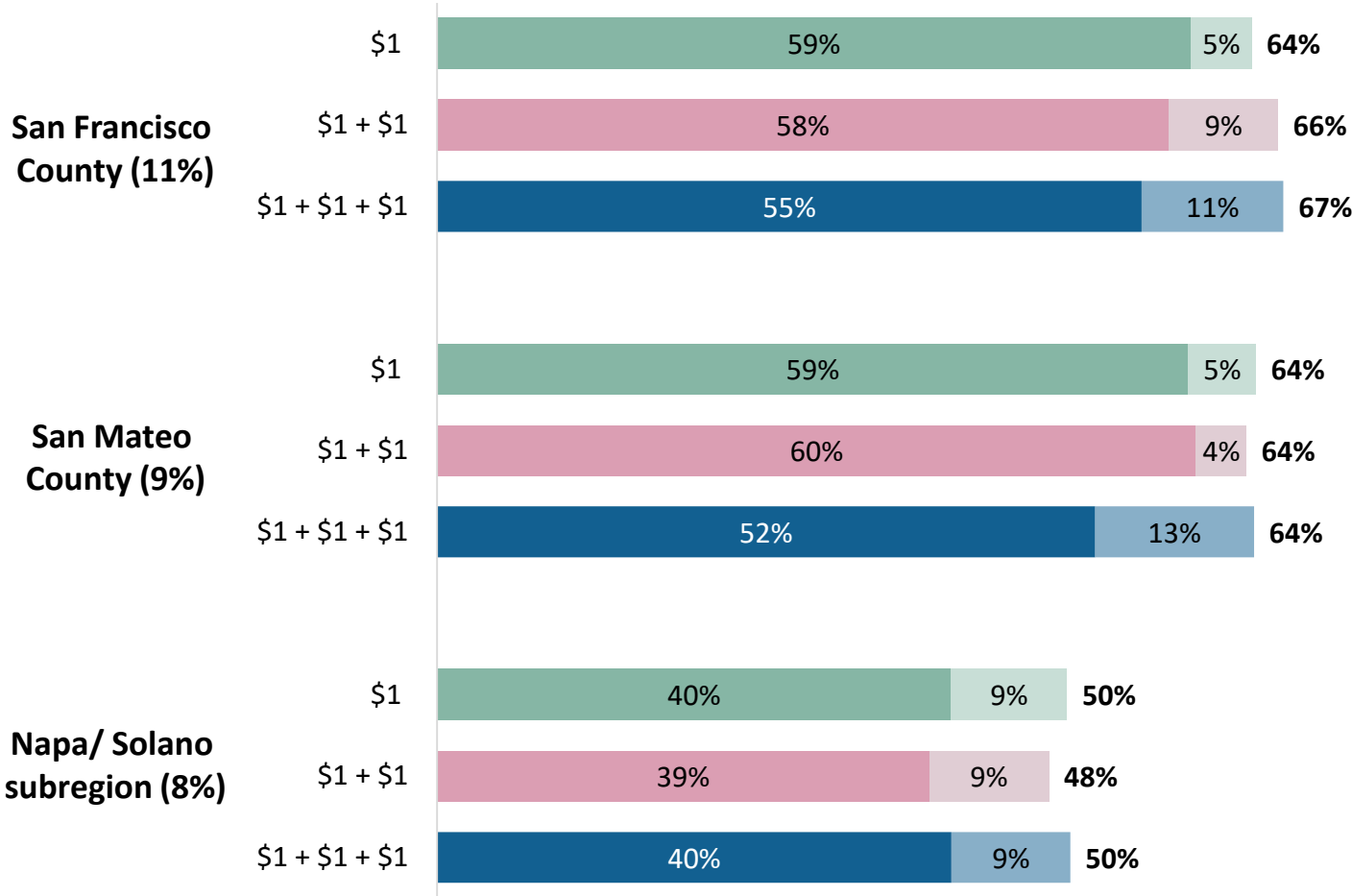
After hearing projects that would be funded by the measure, support for each in Contra Costa is above a majority.



Change in Support by County

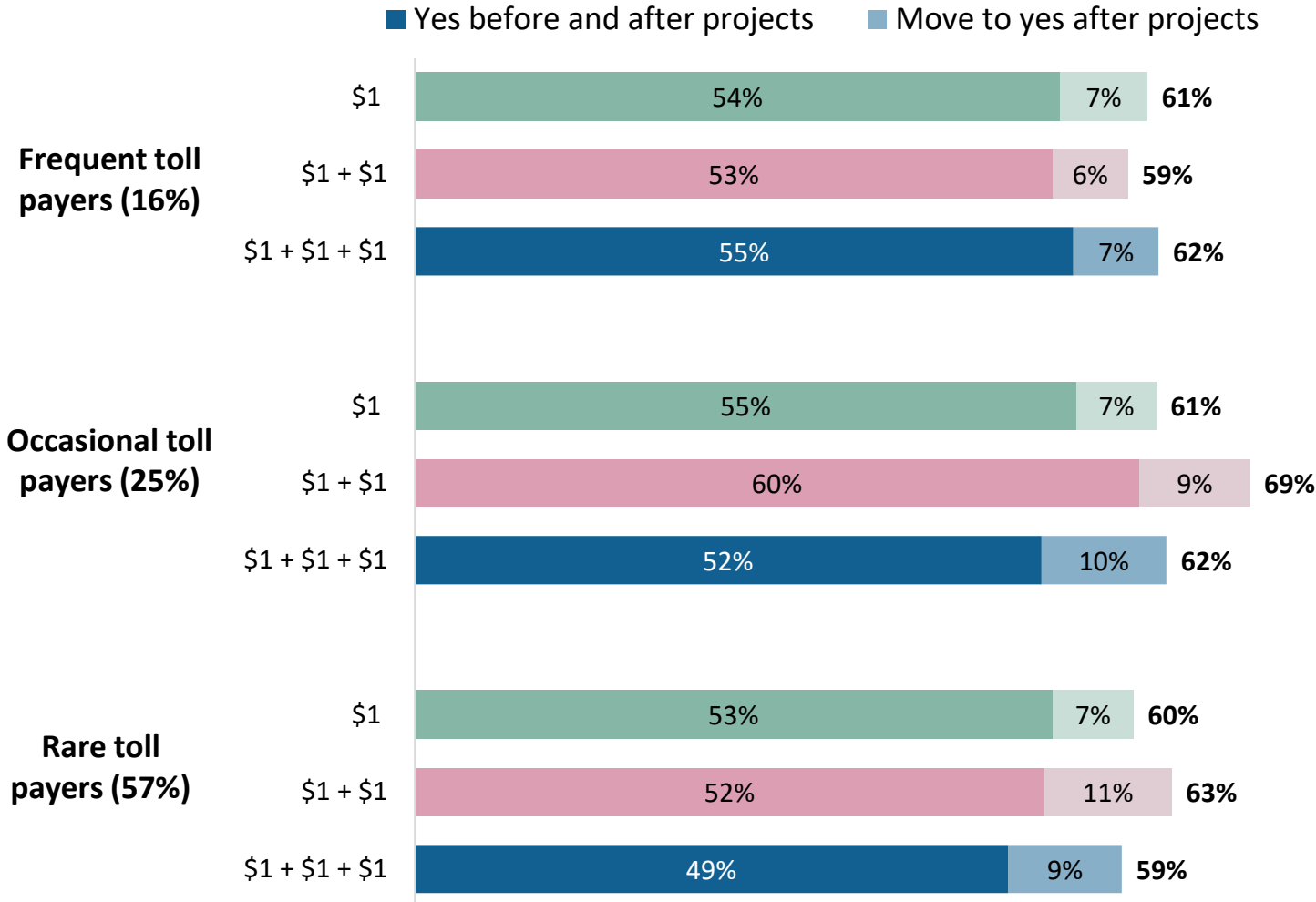
Hearing projects that would be funded by a measure brings support in the Napa/ Solano subregion to right around a majority.

■ Yes before and after projects ■ Move to yes after projects



Change in Support by Bridge Usership

There is little variance in informed vote for the different proposals among frequent toll payers.



Conclusions

- ▶ There is support for a regional transportation measure among the June 2018 electorate.
- ▶ There is not a statistically significant difference in support between the three measures.
- ▶ A small, but significant, percentage of the electorate that were not supportive initially support the measure after hearing about the projects it will fund.

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