



OPINION  
RESEARCH  
& STRATEGY

**TO** Interested Parties

**FROM** Dave Metz and Lucia Del Puppo  
FM3 Research

**RE:** Key Findings from Regional Transportation Measure Research

**DATE** April 18, 2025

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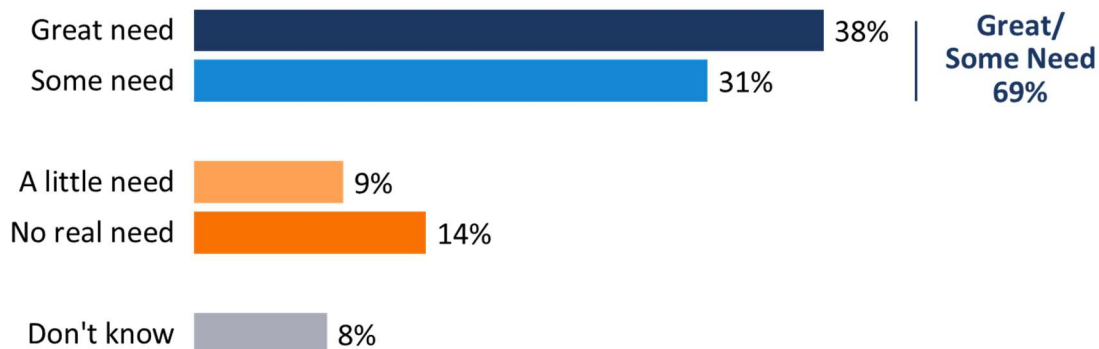
Fairbank, Maslin, Maullin, Metz & Associates (FM3) recently completed a survey of 1,287 likely November 2026 voters in Alameda County, Contra Costa County, San Francisco, and San Mateo County to assess their views of a regional transportation funding measure.<sup>1</sup> The survey was designed as a complement to the research conducted by MTC in January 2025, adopting a similar methodology and question sequence while exploring three additional potential funding mechanisms: a payroll tax, a gross receipts tax, and a hybrid measure combining a sales tax and gross receipts tax. The results show all three mechanisms receiving support at levels comparable to the sales tax tested in the MTC survey, with the gross receipts tax receiving initial support from more than three in five voters.

Key specific findings of the survey include:

- **Two-thirds see a need for additional funding for public transit in the Bay Area.** As shown in **Figure 1**, 69% of voters see at least “some need” for funding and nearly two in five see a “great need” (38%). These results are very similar to those obtained in MTC’s survey of the nine-county region, where 70% of voters indicated there was at least “some need” for additional transit funding.

**Figure 1: Perceived Need for Public Transit Funding**

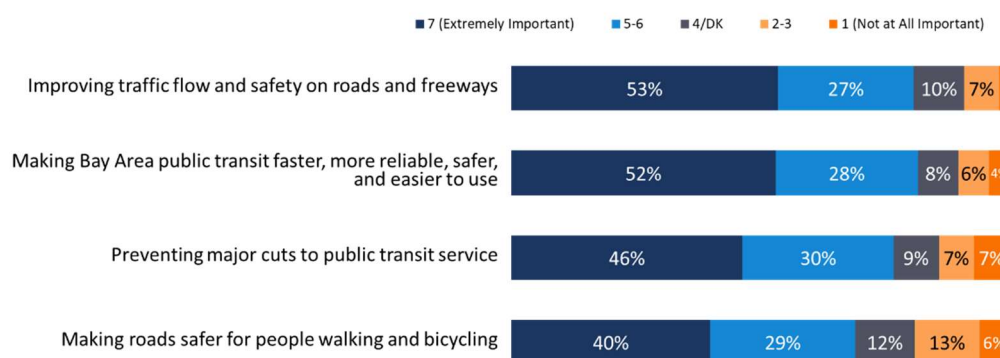
*Would you say that public transit in the Bay Area has a great need for more money, some need for more money, a little need for more money, or no real need for more money?*



- **Voters see improving traffic flow and making Bay Area transit faster, more reliable, safer and easier to use as the region's top transportation priorities.** When asked to rate the importance of a series of transportation priorities, majorities rated improving traffic flow and improving Bay Area transit as extremely important – scoring them a seven on a seven-point importance scale. As shown in **Figure 2**, voters assigned only slightly lower levels of importance to preventing major cuts to public service and making roads safer for people walking and bicycling.

**Figure 2: Bay Area Transportation Funding Priorities**

*Thinking about the Bay Area's transportation needs, on a scale from one to seven, where one is not at all important and seven is extremely important, please indicate how important each of the following is to you.*



- **Initially, three in five voters support the proposed gross receipts tax.** The survey sample was split into three demographically comparable groups, with each group presented one of the three potential funding mechanisms. Respondents were offered ballot language that mirrored the wording used in MTC's survey, only changing the funding mechanism described in the measure.

As shown in **Figure 3**, 61% of voters initially indicate that they are willing to vote “yes” on the proposed gross receipts tax, while 55% each backed the payroll tax and the hybrid sales/gross receipts tax. For reference, in January 57% of voters in the four counties in the MTC survey indicated they would support a half-cent sales tax and 56% said they would support the variable sales tax.

**Figure 3: Initial Support for the Proposed Measures Based on Ballot Language**  
 (+/-4.9% Margin of Error for Each Measure)

Measure	Total Yes	Total No
Gross Receipts Tax	61%	32%
Payroll Tax	55%	40%
Hybrid Sales/Gross Receipts Tax	55%	37%
<i>½ Cent Sales Tax (MTC)</i>	<i>57%</i>	<i>43%</i>
<i>Variable Sales Tax (MTC)</i>	<i>56%</i>	<i>44%</i>

- **After an exchange of pro and con messaging, a majority of 57% continues to back the gross receipts tax.** As detailed in **Figure 4**, 57% support the gross-receipts tax after hearing positive and critical statements, 55% support the payroll tax, and 52% support the hybrid sales/gross receipts tax. Similarly, both versions of the sales taxes tested by MTC retained majority support after pro and con messaging.

**Figure 4: Support for the Proposed Measures After Pro and Con Messaging**

Measure	Initial Support	Support After Pro and Con Messaging	Difference
Gross Receipts Tax	61%	<b>57%</b>	-4%
Payroll Tax	55%	<b>55%</b>	0%
Hybrid Sales/Gross Receipts Tax	55%	<b>52%</b>	-3%
<i>½ Cent Sales Tax (MTC)</i>	57%	<b>54%</b>	-3%
<i>Variable Sales Tax (MTC)</i>	56%	<b>55%</b>	-1%

Taken together, the results of the survey show majority support for each of the funding mechanisms tested, with the highest level of support going to the gross receipts tax – both initially and after pro and con messaging.

### The gross receipts tax performs most strongly out of the three mechanisms.

(Total Yes/Total No)

Funding Mechanism	Initial Vote	After Positives	After All Messaging
Gross Receipts Tax	61/32	61/33	57/36
Payroll Tax	55/40	59/38	55/40
Sales/Business Tax	55/37	57/34	52/38
<i>Variable Sales Tax (EMC/MTC January 2025 Poll)</i>	56/44	59/41	55/45

<sup>i</sup> **Methodology:** From March 15-23, 2025, FM3 completed 1,287 online and telephone (landline and wireless) interviews with voters in Alameda, Contra Costa, San Francisco, and San Mateo counties who are likely to cast ballots in November 2026. The margin of sampling error for the full sample is +/-2.8% at the 95% confidence level, the margin of error for each funding mechanism tested is +/-4.9%, and margins of error for population subgroups within the sample will be higher. Due to rounding, not all totals will sum to 100%.