

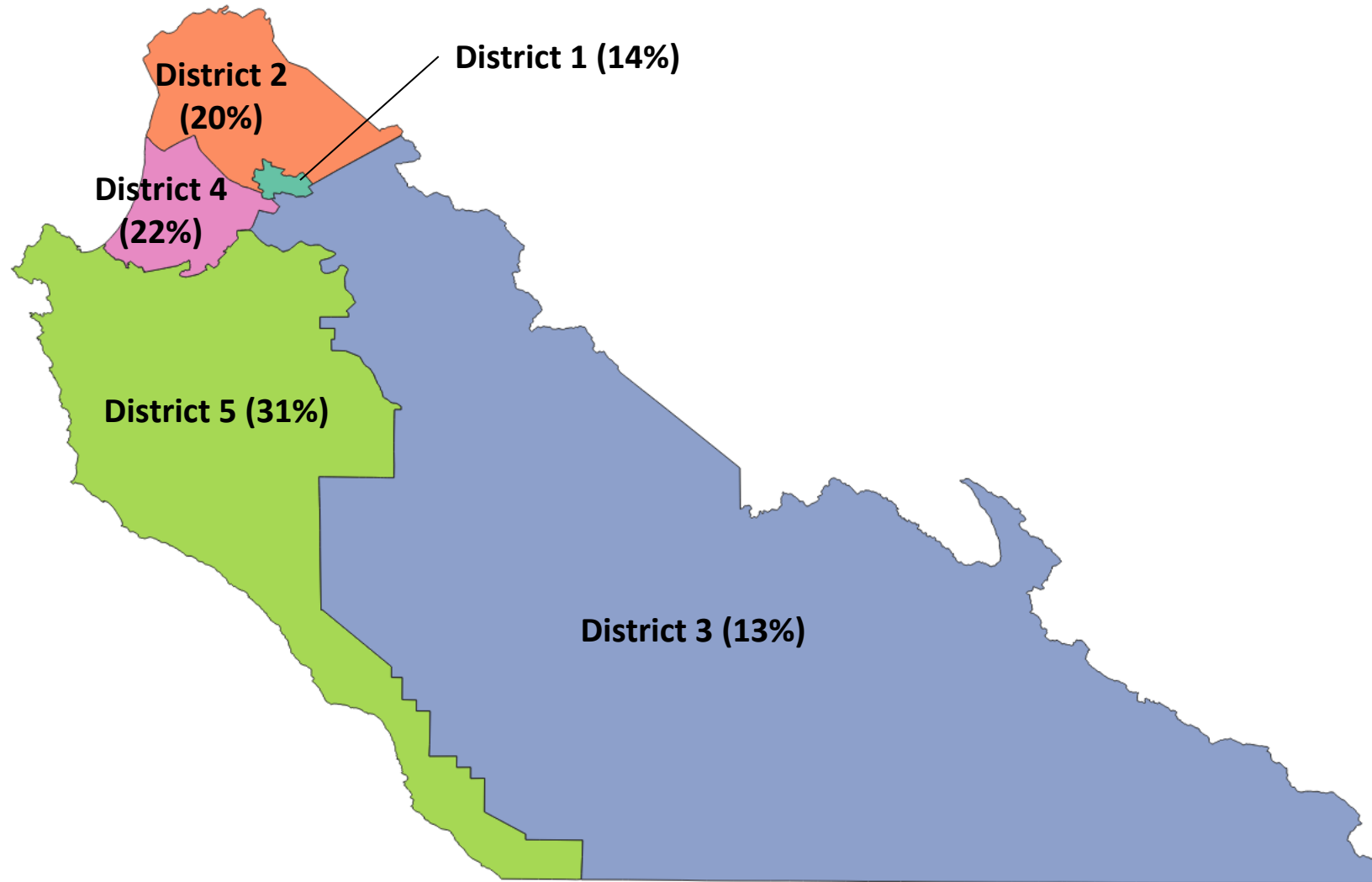


**Likely Voter Survey
Summary Report
County of Monterey
*May 2024***

- ▶ Live telephone and email-to/text-to-web survey of likely November 2024 voters
- ▶ Survey conducted May 16 – 23, 2024
- ▶ 600 interviews; overall margin of error ± 4.0 percentage points
 - Split Sample, 300n interviews in each split, MoE ± 5.65 percentage points
 - Incorporated Sample, 405n interviews total, MoE ± 4.86 percentage points
 - Unincorporated Sample, 195n interviews total, MoE ± 7.01 percentage points
- ▶ Interviews were conducted in English and Spanish by trained, professional interviewers; landlines and mobile phones included
 - Email and text invitations were sent with a link to an online survey

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

Monterey County Supervisorial Districts



Key Findings

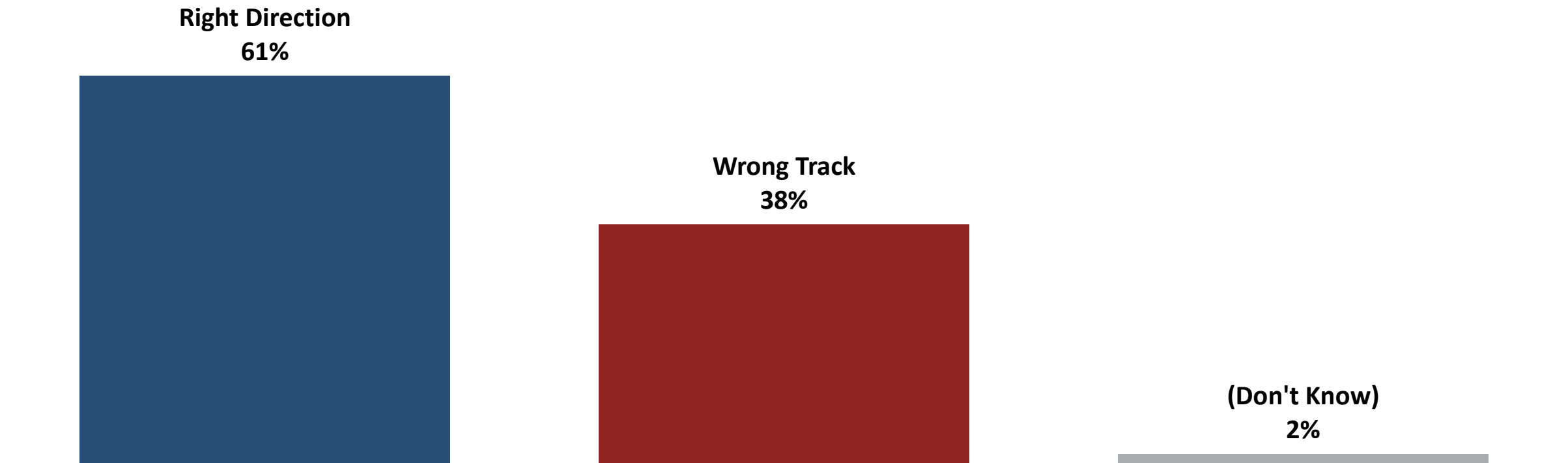
- ▶ Currently, both a sales tax measure and a transient occupancy tax increase (TOT) are supported by about six in ten voters in the county, comfortably above the required majority threshold for passage.
- ▶ Additional information about what additional revenues could fund, and who would be paying, generates much more positive impact for a TOT than for a sales tax.
- ▶ Housing affordability and homelessness are the highest-profile issues for county voters, and they are highly aware of the county's need for funding to address these and other issues.
 - They are also interested in maintaining water and sewer infrastructure, street maintenance and pothole repair, healthcare, and public safety/emergency services.
- ▶ While voters are interested in the county programs and services a measure could fund, there is also a fair amount of general sensitivity to taxes and an interest in making sure the county is held accountable for tax dollars.
- ▶ Both measures show some vulnerability to general anti-tax opposition messaging, although the ability present the TOT as being paid by tourists and not by residents is a very strong differentiator and likely makes it more resilient in the face of potential opposition.



Issue Environment

Right Direction/Wrong Track

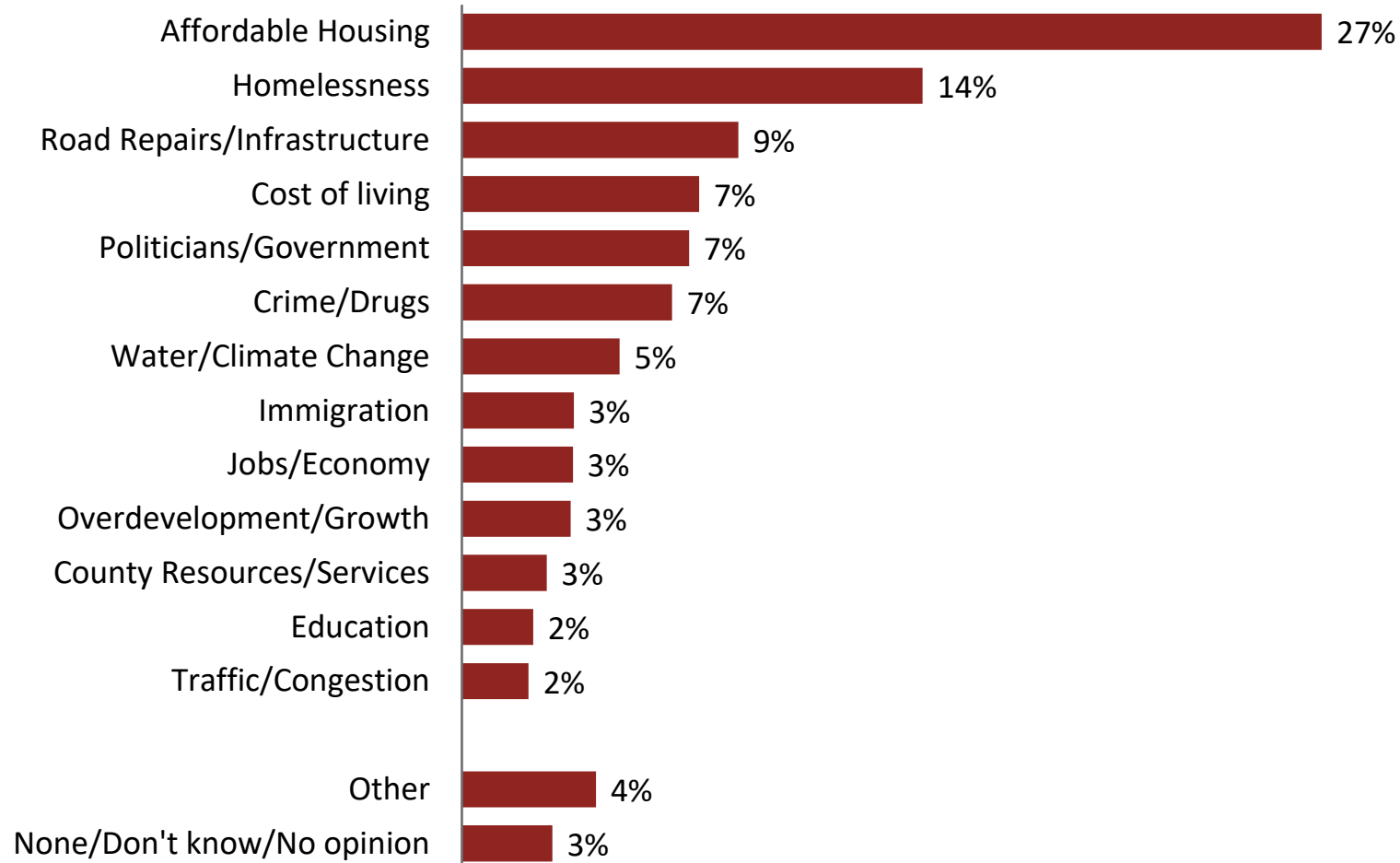
Six in ten voters say things in the county are headed in the right direction.



Q2. Do you think that things in Monterey County are generally going in the right direction or do you feel things have gotten pretty seriously off on the wrong track?

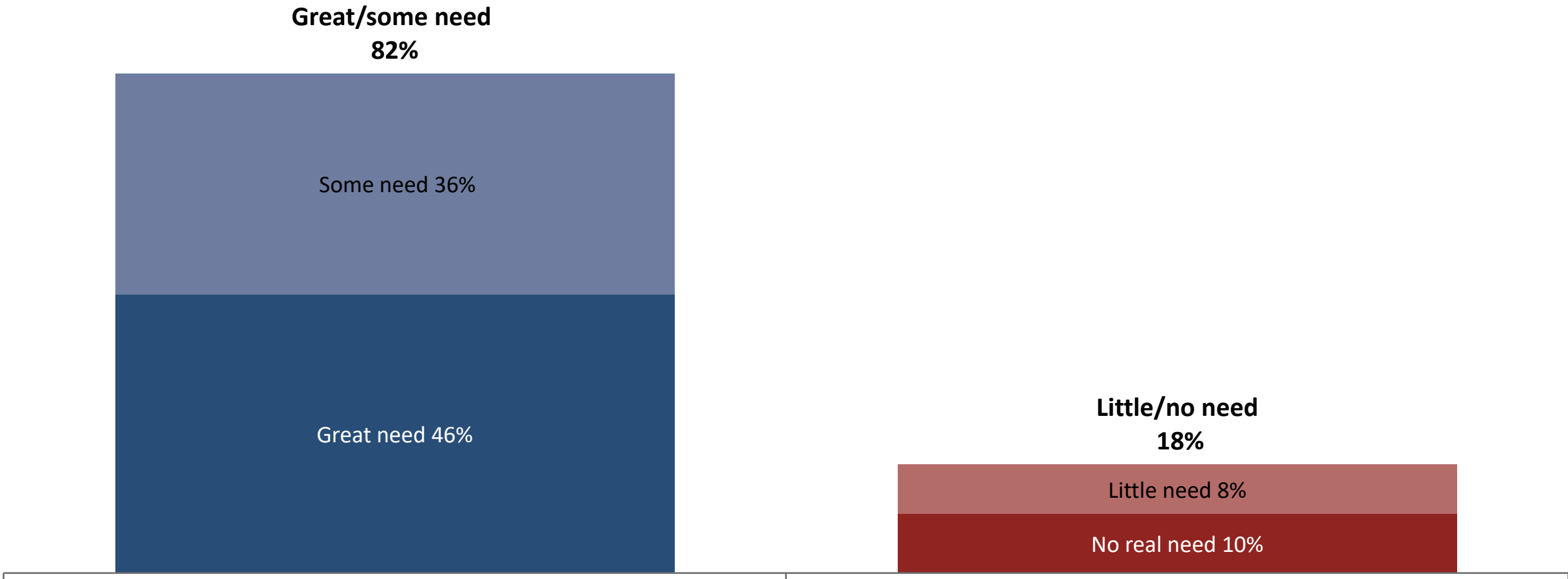
Most Important Problem

Housing affordability and homelessness are the top issues for many Monterey County voters.



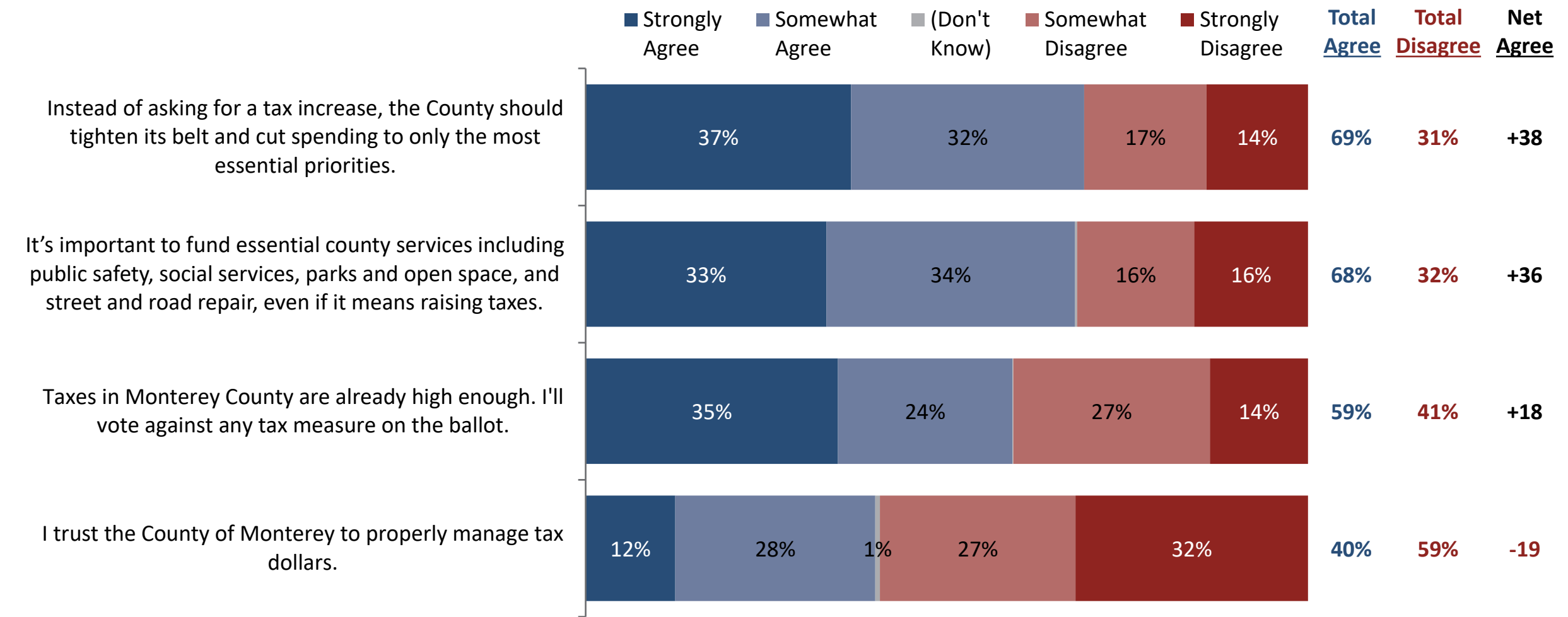
Need for Funds for County Services

A strong majority feel the county has a need for more money for county services, including nearly half of voters who say the county has a great need.



Tax Sensitivity and Trust

While most voters would like to see the county cut spending to only essentials and are generally opposed to taxes, six in ten feel funding essential services could be worth a tax increase.



Q21-24. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.



Revenue Measure Feasibility

Initial Vote: Revenue Measure

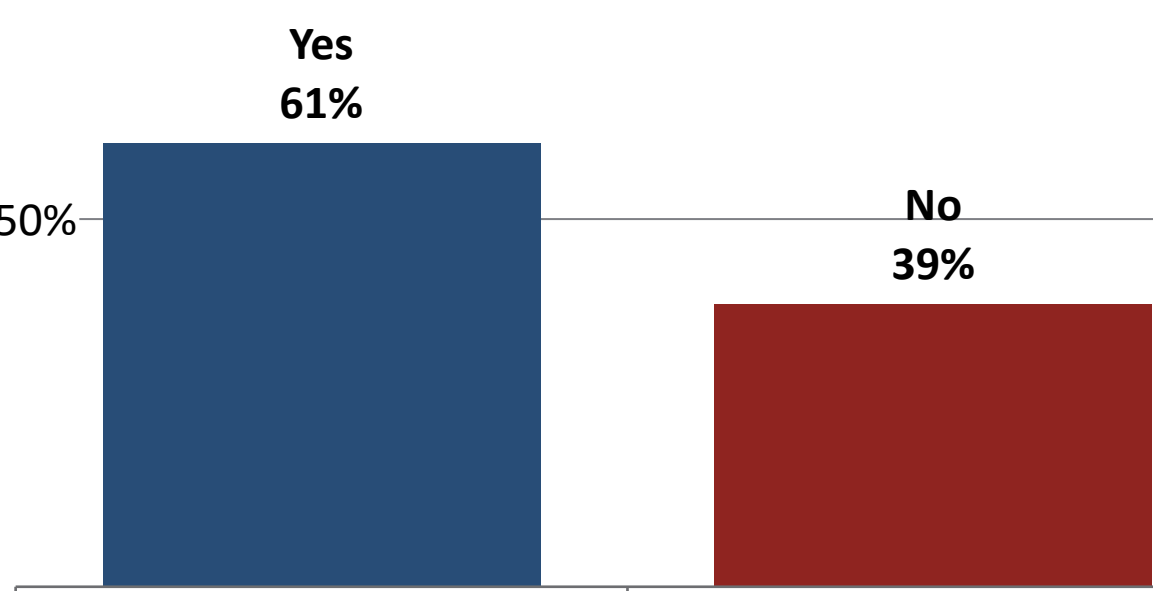
Both revenue measures under consideration are supported by a majority of Monterey County voters in independent asks.

To fund essential County of Monterey services, including improved public safety and emergency services; traffic enforcement and road safety programs; street maintenance and pothole repair; libraries, county parks, and recreation facilities; water and sewer infrastructure maintenance; public health and healthcare; job skill development programs; and programs to reduce homelessness,...

300n, MoE ±5.7%

Split A: Sales Tax

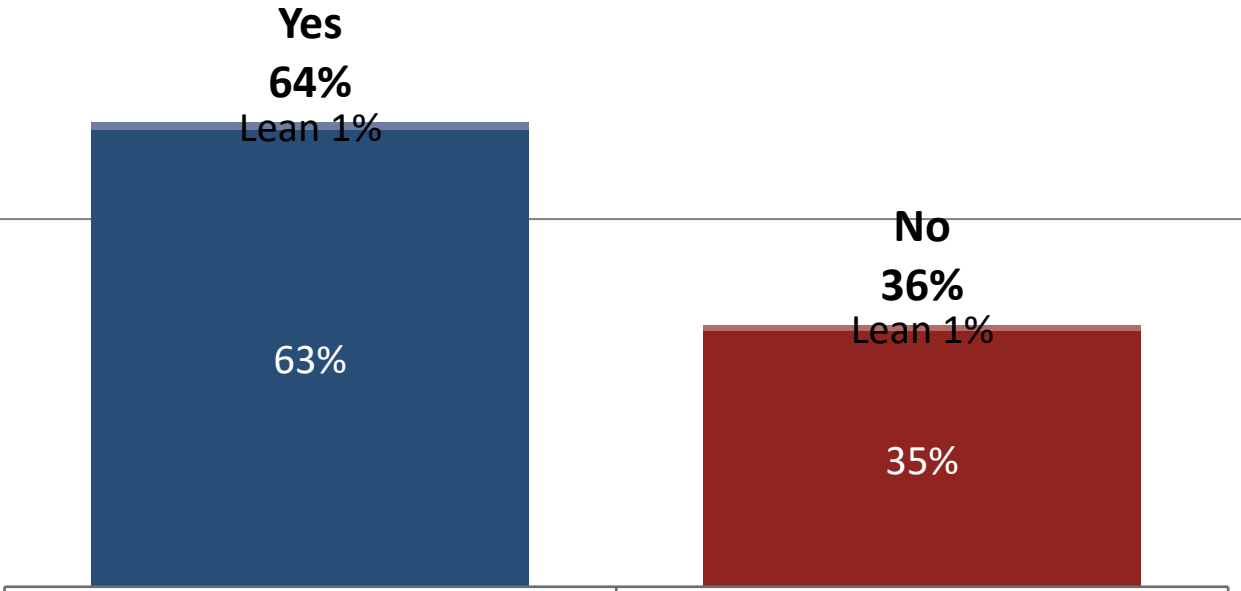
...shall the County of Monterey’s **transaction and use tax be increased** in unincorporated areas by one percent, providing approximately **\$29,000,000 annually**, with all funds spent locally, until ended by voters?



300n, MoE ±5.7%

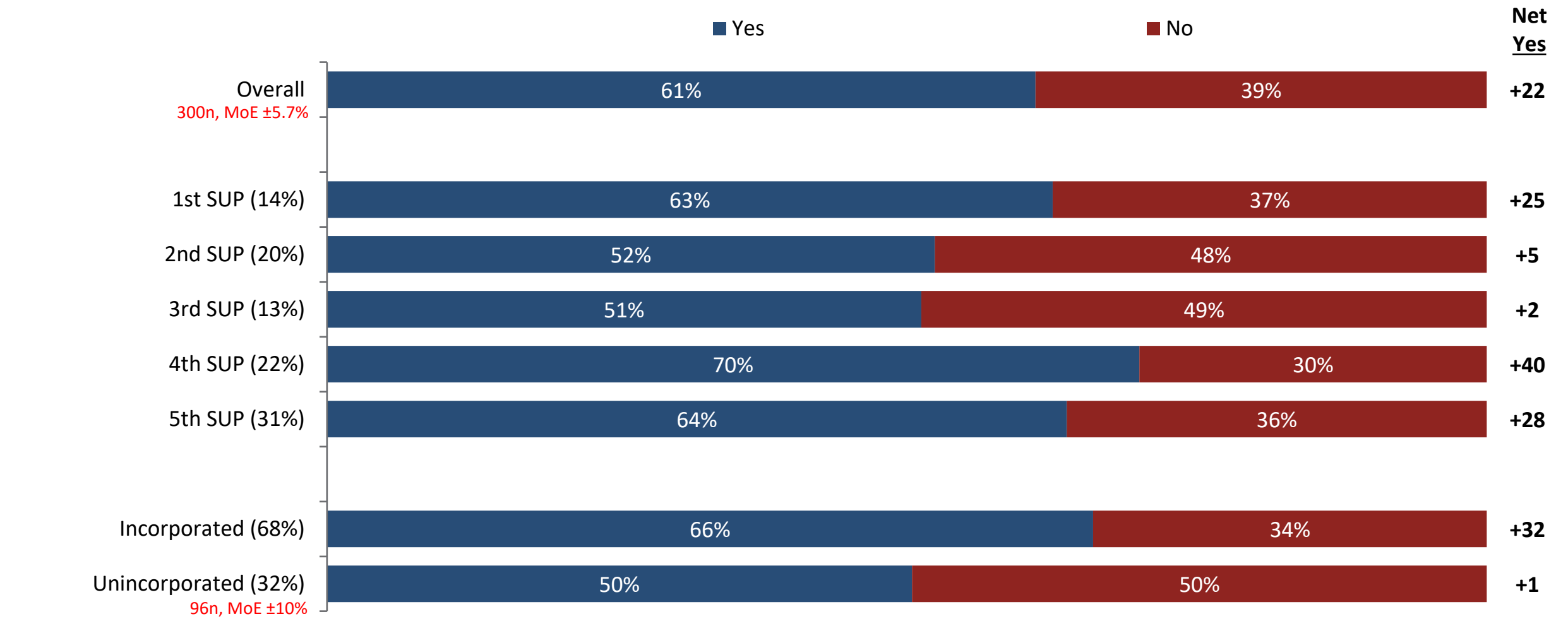
Split B: Transient Occupancy Tax

...shall the County of Monterey **increase its existing Transient Occupancy Tax** in unincorporated areas from 10.5% to 11.5%, paid only by hotel/lodging guests, providing approximately **\$3,700,000 annually**, until ended by voters?



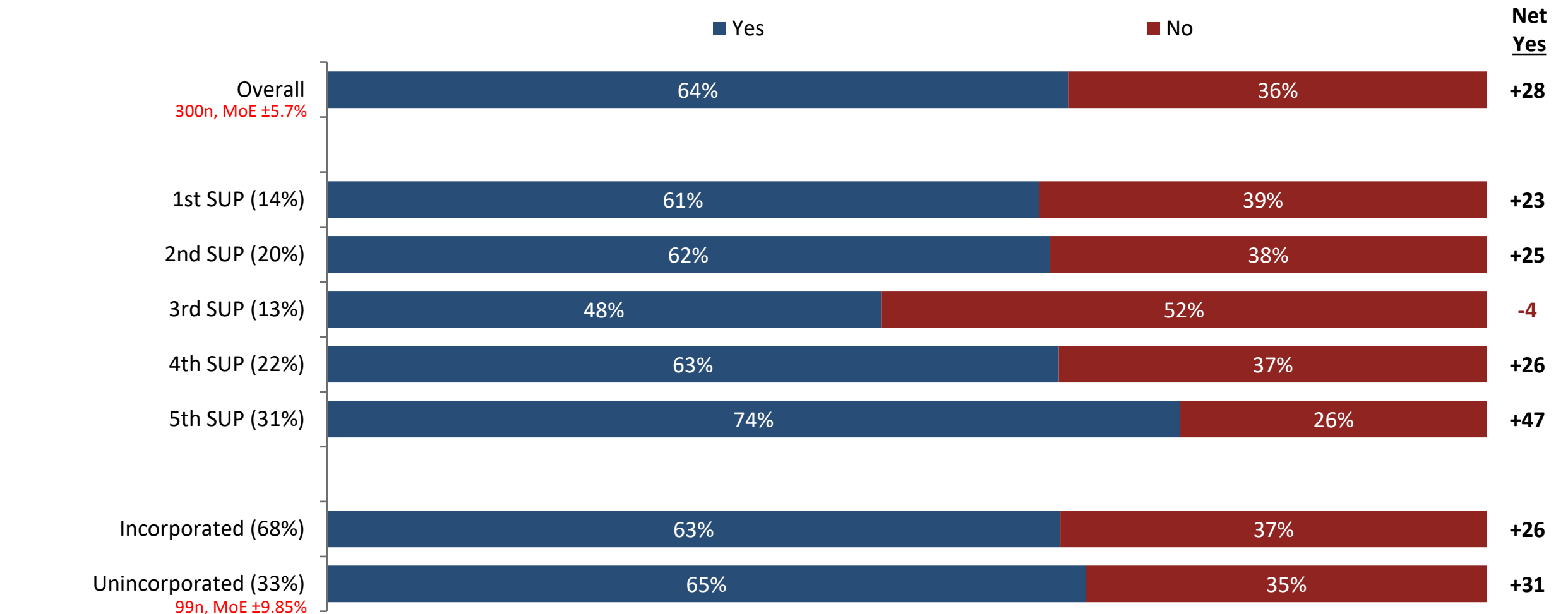
Initial Vote by Subgroups (Split A: Sales Tax)

Support for a sales tax measure is stronger in Supervisorial Districts 1, 4, and 5, as well as the incorporated parts of the county.



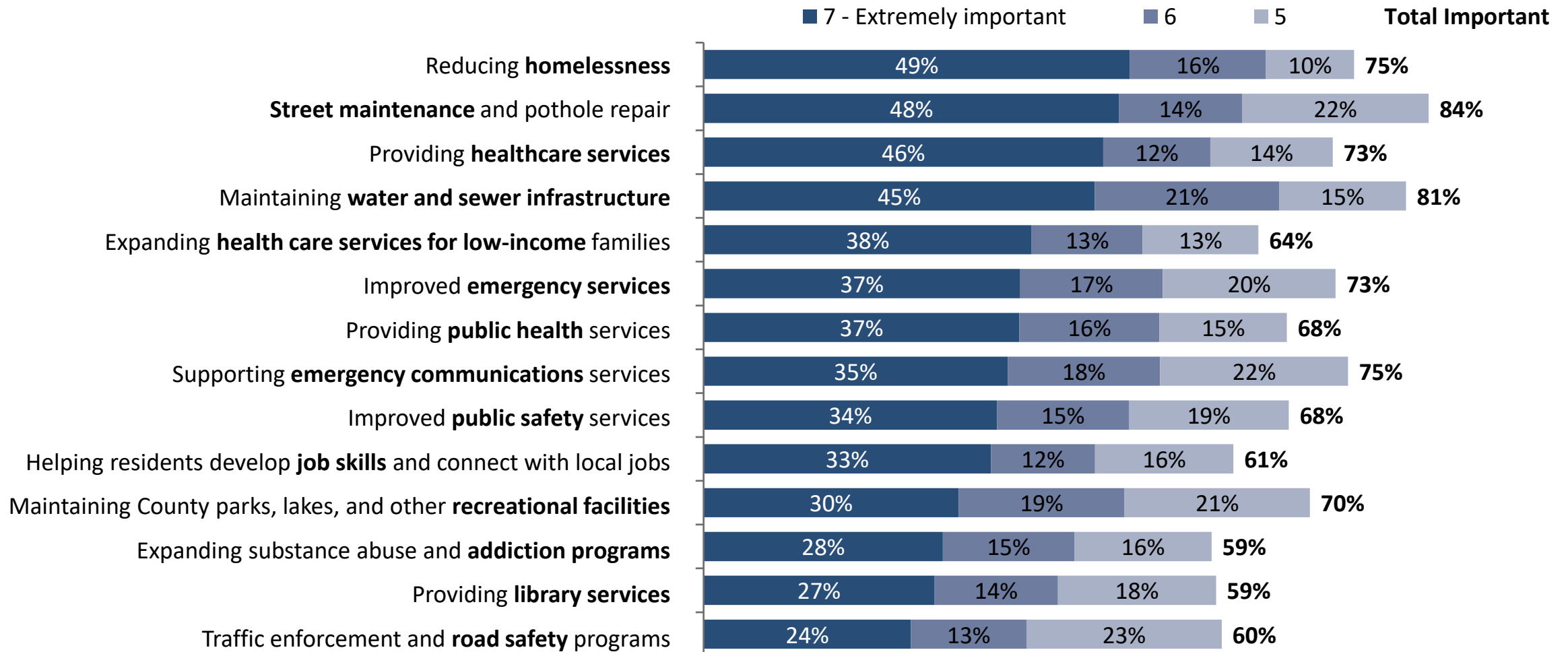
Initial Vote by Subgroups (Split B: TOT)

Support for the transient occupancy tax increase is higher in the 5th Supervisorial District, and under the majority mark in District 3.



Project Importance

While a majority of voters say all categories are important, homelessness reduction, infrastructure maintenance, and healthcare services are the most important priorities for county voters.



Q7-20. Now you will be asked about a list of projects and programs that this ballot measure could support.
After each one, please rate how important that project is to you.

Simulating the Communications Environment

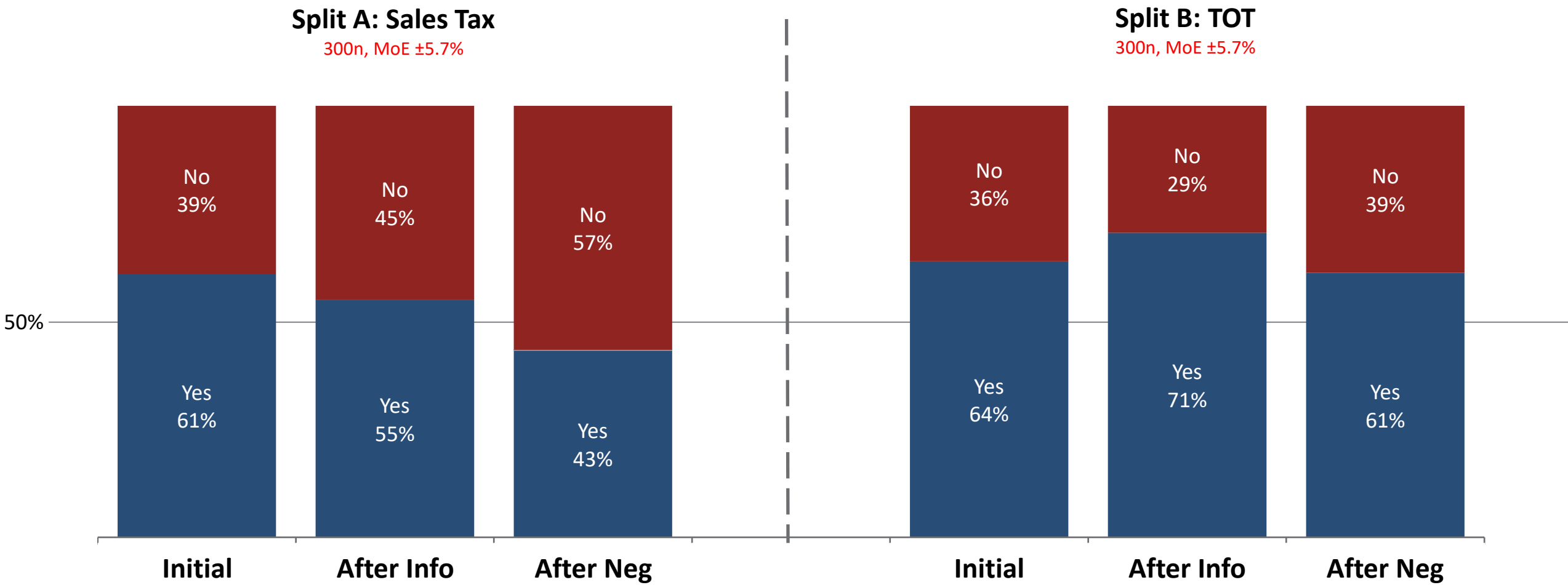
Additional information was provided to respondents to simulate the impact of the potential future communications environment. Respondents were asked to give their support or opposition to the measure after each section. A summary of the information given is provided here.

Part 1: Additional information about a measure, including who would pay under each revenue mechanism, major expenditure categories, potential cuts without additional revenue, and accountability components

Part 2: Potential opposition themes, including vulnerability of the general tax mechanism, cost of living and economic uncertainty, and concerns about impacting tourism

Vote After Communications Environment Simulation

Additional information does impact support for each measure, with the sales tax showing considerably more vulnerability than the TOT measure.



- ▶ Either a 1 percent sales tax measure in the unincorporated areas, or a 1 percent increase in the transient occupancy tax in the unincorporated areas, are currently supported by more than half of Monterey County voters.
- ▶ Positioning a transient occupancy tax measure as exclusively paid by visitors to the county helps to solidify and maintain that support, even with opposition.
- ▶ For a sales tax, while discussion of visitors paying their fair share is also a strong message, that positioning is not as effective of a way to bolster and maintain support in the face of opposition.
- ▶ If the County does decide to place a measure on the ballot, the potential benefits of addressing homelessness and housing affordability, repairing roads, and maintaining critical infrastructure are top priorities for voters.
- ▶ It will also be important to ensure voters are aware of the accountability controls built into a measure to ease their minds about how the funds may be used.



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