

**Transportation Revenue  
Forecast Council  
June 2020  
Transportation Economic and  
Revenue Forecasts  
Volume III: Alternate Forecast Tables**

# Transportation Revenue Forecast Council

## Alternative Forecasts

### June 2020

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# **REVENUE AND RIDERSHIP PROJECTIONS**

## **JUNE 2020 FORECAST**

### **FISCAL YEARS 2020-2029**

Prepared for  
**Washington State Ferries**  
for Presentation to the  
**Transportation Revenue  
Forecast Council**

Prepared by  
WSP USA

June 15, 2020

Note: The COVID-19 pandemic has materially disrupted normal ferry ridership patterns, and the duration and magnitude of the pandemic's temporary near-term effects or its more permanent impacts on the economy and ferry ridership remain unknown. As such, the June 2020 Forecast projections, as well as the assumptions upon which they are based at the time of preparation, are subject to an unprecedented level of risk and uncertainty, which may cause actual results to vary considerably from projections.

# Washington State Ferries

## June 2019 Revenue and Ridership Forecasts — Fiscal Years 2020-2029

### JUNE 2019 FORECAST NOTES

The fare revenue and ridership projections for Washington State Ferries (WSF) are prepared using a combination of systemwide econometric, time series, and spreadsheet models to forecast monthly ridership and revenue across 10 routes and seven fare categories through fiscal year (FY) 2029.

The seven fare categories include: (1) passenger full fares, (2) passenger commuter discount fares, (3) passenger other discount fares, (4) auto/driver full fares, (5) auto commuter discount fares, (6) other discount vehicles, and (7) oversize vehicle fares.

In August of 2019, the Washington State Transportation Commission adopted new fares for FY 2020 that include 2.0% increases for passengers and 2.5% increases for vehicles on October 1, 2019 and again on May 1, 2020. In addition, at the direction of the Legislature, a \$0.25 increase to the current capital surcharge was adopted, effective May 1, 2020, for a total of surcharge of \$0.50 per fare sold. The additional \$0.25 is to be used to finance a new hybrid-electric vessel.

Beginning in early March, the effects of the COVID-19 pandemic have been severely impacting ferry travel, with April 2020 ridership 73% lower than 2019. For the June Forecast, the effects of the pandemic are assumed to continue dampening ridership into 2021, with a recovery transition to a “new normal” occurring by October 2021.

Since 2000, the passenger and vehicle/driver ridership in the commuter (frequent user) fare categories have been declining in both absolute volumes and in their shares of total passengers and vehicles, respectively. Contributing factors include an aging population in ferry-served communities, increased telecommuting, and changes in the frequent user multi-ride fare media, making them less severable for sharing. The June Forecast layers on additional 15% and 10% reductions in passenger and vehicle commuter ridership, respectively, to account for more telecommuting going forward.

In addition, the entire system is assumed to be running on the reduced service hour, winter baseline season schedule through 2020 and the winter of 2021, with the Anacortes-Sidney, B.C. route assumed to remain out of service until late March 2021. The Fauntleroy-Vashon-Southworth, Seattle-Bremerton and Seattle-Bainbridge routes are anticipated to continue operating with one fewer vessel through July 2020.

The forecast assumptions noted above are reflected in both the Baseline and Alternative 1 Forecasts, and will be revisited for the September Forecast.

- **Baseline Forecast** – Assumes no further fare increases beyond those scheduled for May 1, 2020, which results in declining real fares over the forecast horizon.
- **Alternative 1 Forecast** – Assumes 2.5% annual increases plus nickel rounding each October, from 2021 (FY 2022) through 2028 (FY 2029).

The FY 2020 projections include actual ridership and revenue through May 2020.

### Ridership Impacts

- The June 2020 Forecast incorporates the latest demographic and economic variable projections plus a COVID-19 indicator variable, all of which generally trend negative for ferry ridership through at least 2021.
- The forecast for real personal income was revised downward throughout the forecast horizon, contributing to lower ridership demand.
- The forecasts for employment have been revised materially lower in the near term, resulting in lower ridership through FY 2024, with a trend reversal thereafter.
- Lower inflation projections result in progressively higher real fares over time, also contributing to lower ridership demand over the forecast horizon.
- The working and retirement age population indices for ferry-served communities were revised downward and upward, respectively, contributing to a decrease in commuter ridership, with a partially offsetting bump in senior discount ridership.
- Real gasoline prices have been revised lower through FY 2021, then higher thereafter. Ordinarily, this would increase vehicle/driver ridership demand in the near term and dampen it in the long term, absent other factors.
- A COVID-19 indicator variable was added to the econometric models for CY 2020 to capture the ridership decreases not attributed to the above input variables.
- Actual ridership for February 2020 was 28.1% higher than February 2019, with the latter far below normal due to snowy weather. March, April and May ridership levels were 48.0%, 72.6%, and 58.8% lower, respectively, than in 2019, with slightly higher percentage drops relative to the February 2020 forecast.

### Fare and Surcharge Revenue Impacts

- For the 2019-21 biennium, fare revenues for both the Baseline and Alternative 1 Forecasts total \$323.5 M, or \$92.7 M (22.3%) lower than projected in February due to the weaker economic projections and the COVID-19 pandemic’s effects. This total comprises \$313.8 M in base fare revenue and \$9.7 M in surcharges.
- The Baseline Forecast revenue projection for the 2021-23 biennium is \$411.5 M, which is \$24.2 M (5.6%) lower than projected in February, with \$395.8 M in base fare revenue and \$15.7 M in surcharge revenue.
- The Alternative 1 Forecast revenue projection for the 2021-23 is \$420.8 M, which is \$24.9 M (5.6%) lower than projected in February, with \$405.1 M in base fare revenue and \$15.7 M in surcharge revenue.
- For the rest of the forecast horizon, both forecast scenarios range from 3.6% to 4.0% lower than in February, with revenues projected to decrease by smaller percentages than ridership because the largest decreases in ridership occur among the lower (passenger) fare categories.

# Washington State Ferries

## REVENUE PROJECTIONS | JUNE 2020 BASELINE FORECAST

Fare Increases on 10/1/2019 & 5/1/2020 | \$0.25 Surcharge Increase on 5/1/2020<sup>1</sup> | No Further Fare Increases

Fiscal Years 2020-2029

Fiscal Year	June 2020 Capacity-Constrained Revenue Forecast	Fiscal Year Annual Growth Rate	June Biennium Total	June vs. February Forecast			February 2020 Baseline	
				% Change by Fiscal Year	\$ Change and % Change by Biennium		Capacity-Constrained Revenue Forecast	Biennium Total
2010	\$147,009,545	1.7%						
2011	\$143,547,850	(2.4%)	\$290,557,395					
2012	\$155,085,373	8.0%						
2013	\$162,047,033	4.5%	\$317,132,406					
2014	\$167,441,867	3.3%						
2015	\$175,965,750	5.1%	\$343,407,617					
2016	\$181,444,863	3.1%						
2017	\$186,973,746	3.0%	\$368,418,609					
2018	\$192,827,951	3.1%						
2019	\$195,268,522	1.3%	\$388,096,473					
2020 <sup>2</sup>	\$166,689,000	(14.6%)		(17.4%)			\$201,915,000	
2021	\$156,785,000	(5.9%)	\$323,474,000	(26.8%)	(\$92,749,000)	(22.3%)	\$214,308,000	\$416,223,000
2022	\$202,822,000	29.4%		(6.4%)			\$216,739,000	
2023	\$208,714,000	2.9%	\$411,536,000	(4.7%)	(\$24,194,000)	(5.6%)	\$218,991,000	\$435,730,000
2024	\$212,072,000	1.6%		(4.1%)			\$221,027,000	
2025	\$214,513,000	1.2%	\$426,585,000	(3.7%)	(\$17,124,000)	(3.9%)	\$222,682,000	\$443,709,000
2026	\$216,337,000	0.9%		(3.7%)			\$224,547,000	
2027	\$218,400,000	1.0%	\$434,737,000	(3.6%)	(\$16,422,000)	(3.6%)	\$226,612,000	\$451,159,000
2028	\$220,385,000	0.9%		(3.6%)			\$228,639,000	
2029	\$222,479,000	1.0%	\$442,864,000	(3.5%)	(\$16,304,000)	(3.6%)	\$230,529,000	\$459,168,000

<sup>1</sup> The Baseline Forecast includes two FY 2020 fare increases of 2.0% for passengers and 2.5% for vehicles on October 1, 2019 and again on May 1, 2020. The May 1, 2020 increase also includes doubling the existing \$0.25 surcharge per fare sold and collected for capital uses to a total of \$0.50. The Baseline Forecast excludes any further changes to the current base fares, resulting in declining real fares thereafter. The Baseline Forecast also reflects the current programmed level of service.

<sup>2</sup> FY 2020 includes actual revenue data through May 2020. Light green shaded values denote historical annual data.

# Washington State Ferries

## REVENUE PROJECTIONS | JUNE 2020 BASELINE FORECAST

Fare Increases on 10/1/2019 & 5/1/2020 | \$0.25 Surcharge Increase on 5/1/2020<sup>1</sup> | No Further Fare Increases

Fiscal Years 2020-2029

Fiscal Year	June 2020 Capacity-Constrained Revenue Forecast	June Biennium Total	Distribution of Revenue to Operating and Capital Programs						
			25¢ Capital Surcharge Revenue	25¢ Vessel Surcharge Revenue	Total Surcharge Revenue	Biennium Totals for Capital	Base Fare Revenue for Operations	Biennium Totals for Operations	
2010	\$147,009,545							\$147,009,545	
2011	\$143,547,850	\$290,557,395						\$143,547,850	\$290,557,395
2012	\$155,085,373		\$2,544,970		\$2,544,970			\$152,540,403	
2013	\$162,047,033	\$317,132,406	\$3,626,191		\$3,626,191	\$6,171,161		\$158,420,842	\$310,961,245
2014	\$167,441,867		\$3,662,690		\$3,662,690			\$163,779,177	
2015	\$175,965,750	\$343,407,617	\$3,894,088		\$3,894,088	\$7,556,778		\$172,071,662	\$335,850,839
2016	\$181,444,863		\$4,007,848		\$4,007,848			\$177,437,015	
2017	\$186,973,746	\$368,418,609	\$4,022,681		\$4,022,681	\$8,030,529		\$182,951,065	\$360,388,080
2018	\$192,827,951		\$4,084,581		\$4,084,581			\$188,743,370	
2019	\$195,268,522	\$388,096,473	\$3,987,656		\$3,987,656	\$8,072,237		\$191,280,866	\$380,024,236
2020 <sup>2</sup>	\$166,689,000		\$3,314,000	\$388,000	\$3,702,000			\$162,987,000	
2021	\$156,785,000	\$323,474,000	\$2,984,000	\$2,984,000	\$5,968,000	\$9,670,000		\$150,817,000	\$313,804,000
2022	\$202,822,000		\$3,875,000	\$3,874,000	\$7,749,000			\$195,073,000	
2023	\$208,714,000	\$411,536,000	\$3,999,000	\$3,998,000	\$7,997,000	\$15,746,000		\$200,717,000	\$395,790,000
2024	\$212,072,000		\$4,059,000	\$4,058,000	\$8,117,000			\$203,955,000	
2025	\$214,513,000	\$426,585,000	\$4,108,000	\$4,107,000	\$8,215,000	\$16,332,000		\$206,298,000	\$410,253,000
2026	\$216,337,000		\$4,149,000	\$4,148,000	\$8,297,000			\$208,040,000	
2027	\$218,400,000	\$434,737,000	\$4,198,000	\$4,198,000	\$8,396,000	\$16,693,000		\$210,004,000	\$418,044,000
2028	\$220,385,000		\$4,246,000	\$4,246,000	\$8,492,000			\$211,893,000	
2029	\$222,479,000	\$442,864,000	\$4,295,000	\$4,294,000	\$8,589,000	\$17,081,000		\$213,890,000	\$425,783,000

<sup>1</sup> The Baseline Forecast includes two FY 2020 fare increases of 2.0% for passengers and 2.5% for vehicles on October 1, 2019 and again on May 1, 2020. The May 1, 2020 increase also includes doubling the existing \$0.25 surcharge per fare sold and collected for capital uses to a total of \$0.50. The Baseline Forecast excludes any further changes to the current base fares, resulting in declining real fares thereafter. The Baseline Forecast also reflects the current programmed level of service.

<sup>2</sup> FY 2020 includes actual revenue data through May 2020. Light green shaded values denote historical annual data.

# Washington State Ferries

## REVENUE PROJECTIONS | JUNE 2020 ALTERNATIVE 1 FORECAST

Fare Increases on 10/1/2019 & 5/1/2020 | \$0.25 Surcharge Increase on 5/1/2020<sup>1</sup> | 2.5% Fare Increases FYs 2022-29

Fiscal Years 2020-2029

Fiscal Year	June 2020 Capacity-Constrained Revenue Forecast	Fiscal Year Annual Growth Rate	June Biennium Total	June vs. February Forecast		February 2020 Alternative 1	
				% Change by Fiscal Year	\$ Change and % Change by Biennium	Capacity-Constrained Revenue Forecast	Biennium Total
2010	\$147,009,545	1.7%					
2011	\$143,547,850	(2.4%)	\$290,557,395				
2012	\$155,085,373	8.0%					
2013	\$162,047,033	4.5%	\$317,132,406				
2014	\$167,441,867	3.3%					
2015	\$175,965,750	5.1%	\$343,407,617				
2016	\$181,444,863	3.1%					
2017	\$186,973,746	3.0%	\$368,418,609				
2018	\$192,827,951	3.1%					
2019	\$195,268,522	1.3%	\$388,096,473				
2020 <sup>2</sup>	\$166,689,000	(14.6%)		(17.4%)		\$201,915,000	
2021	\$156,785,000	(5.9%)	\$323,474,000	(26.8%)	(\$92,749,000) (22.3%)	\$214,308,000	\$416,223,000
2022	\$205,538,000	31.1%		(6.5%)		\$219,719,000	
2023	\$215,236,000	4.7%	\$420,774,000	(4.8%)	(\$24,940,000) (5.6%)	\$225,995,000	\$445,714,000
2024	\$222,642,000	3.4%		(4.1%)		\$232,219,000	
2025	\$229,526,000	3.1%	\$452,168,000	(3.9%)	(\$18,769,000) (4.0%)	\$238,718,000	\$470,937,000
2026	\$236,157,000	2.9%		(3.8%)		\$245,550,000	
2027	\$243,133,000	3.0%	\$479,290,000	(3.8%)	(\$19,060,000) (3.8%)	\$252,800,000	\$498,350,000
2028	\$250,111,000	2.9%		(4.0%)		\$260,403,000	
2029	\$257,403,000	2.9%	\$507,514,000	(3.9%)	(\$20,804,000) (3.9%)	\$267,915,000	\$528,318,000

<sup>1</sup> The Alternative 1 Forecast includes two FY 2020 fare increases of 2.0% for passengers and 2.5% for vehicles on October 1, 2019 and again on May 1, 2020. The May 1, 2020 increase also includes doubling the existing \$0.25 surcharge per fare sold and collected for capital uses to a total of \$0.50. The Alternative 1 Forecast also includes annual 2.5% fare increases beginning in October 2021 (FY 2022). This yields slightly increasing real fares over the forecast horizon, given current inflation projections of about 2% annually. Alternative 1 reflects the current programmed level of service.

<sup>2</sup> FY 2020 includes actual revenue data through May 2020. Light green shaded values denote historical annual data.

# Washington State Ferries

## REVENUE PROJECTIONS | JUNE 2020 ALTERNATIVE 1 FORECAST

Fare Increases on 10/1/2019 & 5/1/2020 | \$0.25 Surcharge Increase on 5/1/2020<sup>1</sup> | 2.5% Fare Increases FYs 2022-29

Fiscal Years 2020-2029

Fiscal Year	June 2020 Capacity-Constrained Revenue Forecast	June Biennium Total	Distribution of Revenue to Operating and Capital Programs					
			25¢ Capital Surcharge Revenue	25¢ Vessel Surcharge Revenue	Total Surcharge Revenue	Biennium Totals for Capital	Base Fare Revenue for Operations	Biennium Totals for Operations
2010	\$147,009,545						\$147,009,545	
2011	\$143,547,850	\$290,557,395					\$143,547,850	\$290,557,395
2012	\$155,085,373		\$2,544,970		\$2,544,970		\$152,540,403	
2013	\$162,047,033	\$317,132,406	\$3,626,191		\$3,626,191	\$6,171,161	\$158,420,842	\$310,961,245
2014	\$167,441,867		\$3,662,690		\$3,662,690		\$163,779,177	
2015	\$175,965,750	\$343,407,617	\$3,894,088		\$3,894,088	\$7,556,778	\$172,071,662	\$335,850,839
2016	\$181,444,863		\$4,007,848		\$4,007,848		\$177,437,015	
2017	\$186,973,746	\$368,418,609	\$4,022,681		\$4,022,681	\$8,030,529	\$182,951,065	\$360,388,080
2018	\$192,827,951		\$4,084,581		\$4,084,581		\$188,743,370	
2019	\$195,268,522	\$388,096,473	\$3,987,656		\$3,987,656	\$8,072,237	\$191,280,866	\$380,024,236
2020 <sup>2</sup>	\$166,689,000		\$3,315,000	\$387,000	\$3,702,000		\$162,987,000	
2021	\$156,785,000	\$323,474,000	\$2,984,000	\$2,984,000	\$5,968,000	\$9,670,000	\$150,817,000	\$313,804,000
2022	\$205,538,000		\$3,865,000	\$3,864,000	\$7,729,000		\$197,809,000	
2023	\$215,236,000	\$420,774,000	\$3,966,000	\$3,966,000	\$7,932,000	\$15,661,000	\$207,304,000	\$405,113,000
2024	\$222,642,000		\$4,003,000	\$4,003,000	\$8,006,000		\$214,636,000	
2025	\$229,526,000	\$452,168,000	\$4,029,000	\$4,028,000	\$8,057,000	\$16,063,000	\$221,469,000	\$436,105,000
2026	\$236,157,000		\$4,049,000	\$4,048,000	\$8,097,000		\$228,060,000	
2027	\$243,133,000	\$479,290,000	\$4,076,000	\$4,076,000	\$8,152,000	\$16,249,000	\$234,981,000	\$463,041,000
2028	\$250,111,000		\$4,102,000	\$4,102,000	\$8,204,000		\$241,907,000	
2029	\$257,403,000	\$507,514,000	\$4,132,000	\$4,131,000	\$8,263,000	\$16,467,000	\$249,140,000	\$491,047,000

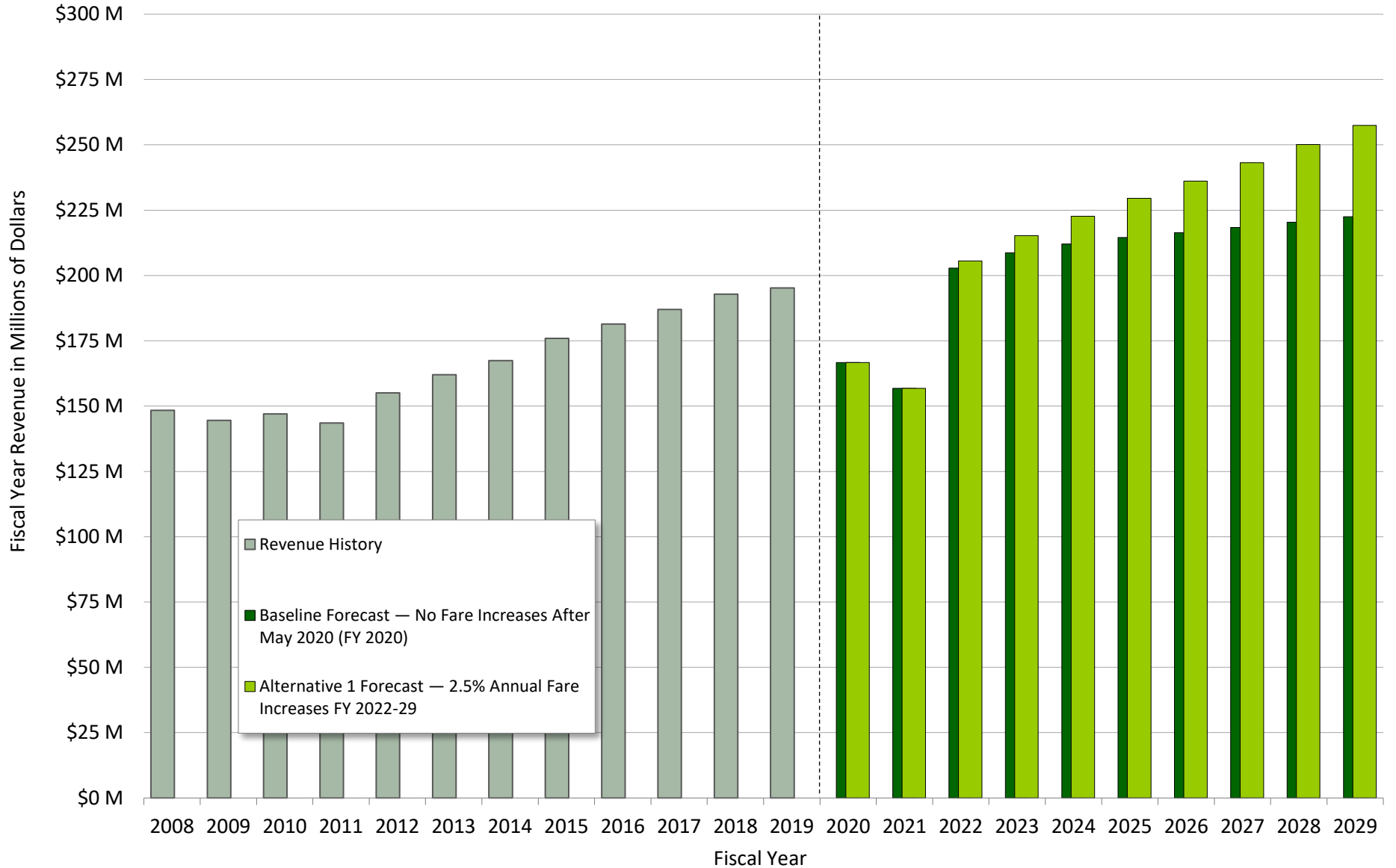
<sup>1</sup> The Baseline & Alt 1 Forecasts includes two FY 2020 fare increases of 2.0% for passengers and 2.5% for vehicles on October 1, 2019 and again on May 1, 2020. The May 1 increase also includes doubling the existing \$0.25 surcharge per fare sold and collected for capital uses to a total of \$0.50. The Alternative 1 Forecast also includes annual 2.5% fare increases beginning in October 2021 (FY 2022), whereas the Baseline forecast includes no further fare increases. Both the Baseline and Alternative 1 Forecasts reflect the current programmed level of service.

<sup>2</sup> FY 2020 includes actual revenue data through May 2020. Light green shaded values denote historical annual data.



# Washington State Ferries — Revenue History and Forecast Trends

## June 2020 Forecast – Fiscal Years 2008-2029



# Washington State Ferries

## RIDERSHIP PROJECTIONS | JUNE 2020 BASELINE FORECAST

Fare Increases on 10/1/2019 & 5/1/2020 | \$0.25 Surcharge Increase on 5/1/2020<sup>1</sup> | No Further Fare Increases

Fiscal Years 2020-2029

Fiscal Year	June 2020 Unconstrained Demand Forecast*	June 2020 Capacity Constrained Projections				February 2020 Baseline Projections	
		Passenger Ridership	Vehicle/Driver Ridership	Total Ridership	Annual Rate of Growth	Total Ridership	June 2020 vs February
2010		12,463,027	10,169,074	22,632,101	(0.3%)		
2011		12,242,320	9,968,973	22,211,293	(1.9%)		
2012		12,236,081	9,983,059	22,219,140	0.0%		
2013		12,350,126	10,045,043	22,395,169	0.8%		
2014		12,696,936	10,154,905	22,851,841	2.0%		
2015		13,270,874	10,387,368	23,658,242	3.5%		
2016		13,523,385	10,559,240	24,082,625	1.8%		
2017		13,669,834	10,544,735	24,214,569	0.5%		
2018		13,856,444	10,707,373	24,563,817	1.4%		
2019		13,700,239	10,555,543	24,255,782	(1.3%)		
2020 <sup>2</sup>	19,538,000	10,530,000	9,008,000	19,538,000	(19.5%)	24,330,000	(19.7%)
2021	17,682,000	9,663,000	7,996,000	17,659,000	(9.6%)	24,798,000	(28.8%)
2022	23,065,000	12,957,000	10,106,000	23,063,000	30.6%	25,035,000	(7.9%)
2023	23,828,000	13,427,000	10,390,000	23,817,000	3.3%	25,326,000	(6.0%)
2024	24,157,000	13,512,000	10,605,000	24,117,000	1.3%	25,617,000	(5.9%)
2025	24,458,000	13,632,000	10,760,000	24,392,000	1.1%	25,871,000	(5.7%)
2026	24,747,000	13,761,000	10,877,000	24,638,000	1.0%	26,174,000	(5.9%)
2027	25,115,000	13,988,000	10,977,000	24,965,000	1.3%	26,482,000	(5.7%)
2028	25,479,000	14,219,000	11,067,000	25,286,000	1.3%	26,815,000	(5.7%)
2029	25,863,000	14,455,000	11,161,000	25,616,000	1.3%	27,158,000	(5.7%)

<sup>1</sup> The Baseline Forecast includes two FY 2020 fare increases of 2.0% for passengers and 2.5% for vehicles on October 1, 2019 and again on May 1, 2020. The May 1, 2020 increase also includes doubling the existing \$0.25 surcharge per fare sold and collected for capital uses to a total of \$0.50. The Baseline Forecast excludes any further changes to the current base fares, resulting in declining real fares thereafter. The Baseline Forecast also reflects the current programmed level of service.

<sup>2</sup> FY 2020 includes actual ridership data through May 2020. Light green shaded values denote historical annual data.

\* Excludes adjustments for vessel capacity constraints and fiscal year-to-date actual data.

# Washington State Ferries

## RIDERSHIP PROJECTIONS | JUNE 2020 ALTERNATIVE 1 FORECAST

Fare Increases on 10/1/2019 & 5/1/2020 | \$0.25 Surcharge Increase on 5/1/2020<sup>1</sup> | 2.5% Fare Increases FYs 2022-29  
Fiscal Years 2020-2029

Fiscal Year	June 2020 Unconstrained Demand Forecast*	June 2020 Capacity Constrained Projections				February 2020 Alt 1 Projections	
		Passenger Ridership	Vehicle/Driver Ridership	Total Ridership	Annual Rate of Growth	Total Ridership	June 2020 vs February
2010		12,463,027	10,169,074	22,632,101	(0.3%)		
2011		12,242,320	9,968,973	22,211,293	(1.9%)		
2012		12,236,081	9,983,059	22,219,140	0.0%		
2013		12,350,126	10,045,043	22,395,169	0.8%		
2014		12,696,936	10,154,905	22,851,841	2.0%		
2015		13,270,874	10,387,368	23,658,242	3.5%		
2016		13,523,385	10,559,240	24,082,625	1.8%		
2017		13,669,834	10,544,735	24,214,569	0.5%		
2018		13,856,444	10,707,373	24,563,817	1.4%		
2019		13,700,239	10,555,543	24,255,782	(1.3%)		
2020 <sup>2</sup>	19,538,000	10,530,000	9,008,000	19,538,000	(19.5%)	24,330,000	(19.7%)
2021	17,682,000	9,663,000	7,996,000	17,659,000	(9.6%)	24,798,000	(28.8%)
2022	23,004,000	12,923,000	10,080,000	23,003,000	30.3%	24,981,000	(7.9%)
2023	23,622,000	13,314,000	10,301,000	23,615,000	2.7%	25,134,000	(6.0%)
2024	23,805,000	13,321,000	10,454,000	23,775,000	0.7%	25,286,000	(6.0%)
2025	23,953,000	13,357,000	10,547,000	23,904,000	0.5%	25,413,000	(5.9%)
2026	24,075,000	13,391,000	10,618,000	24,009,000	0.4%	25,574,000	(6.1%)
2027	24,273,000	13,520,000	10,669,000	24,189,000	0.7%	25,743,000	(6.0%)
2028	24,469,000	13,655,000	10,708,000	24,363,000	0.7%	25,955,000	(6.1%)
2029	24,686,000	13,794,000	10,762,000	24,556,000	0.8%	26,176,000	(6.2%)

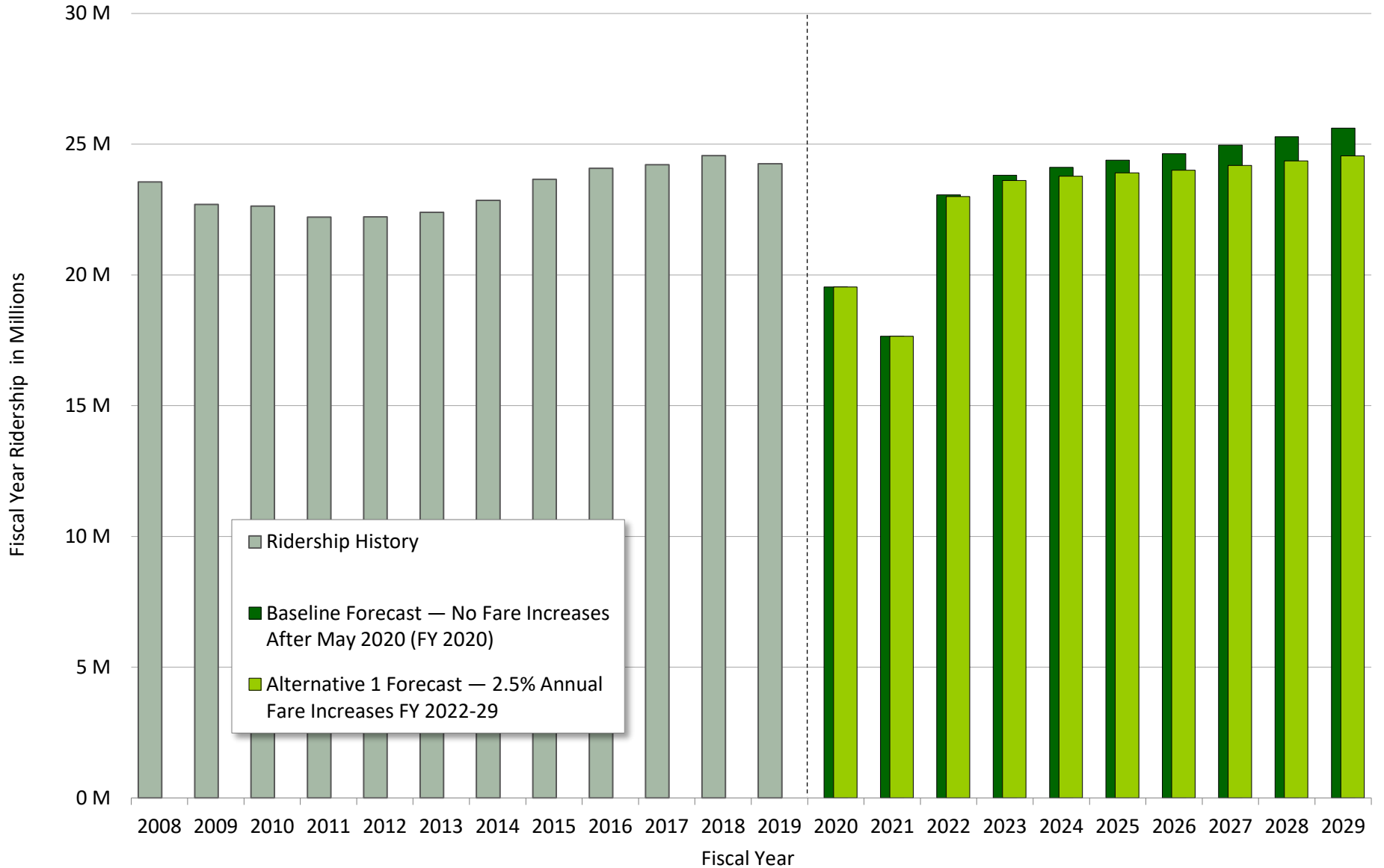
<sup>1</sup> The Alternative 1 Forecast includes two FY 2020 fare increases of 2.0% for passengers and 2.5% for vehicles on October 1, 2019 and again on May 1, 2020. The May 1, 2020 increase also include doubling the existing \$0.25 surcharge per fare sold and collected for capital uses to a total of \$0.50. The Alternative 1 Forecast also includes annual 2.5% fare increases beginning in October 2021 (FY 2022). This yields slightly increasing real fares over the forecast horizon, given current inflation projections of about 2% annually. Alternative 1 reflects the current programmed level of service.

<sup>2</sup> FY 2020 includes actual ridership data through May 2020. Light green shaded values denote historical annual data.

\* Excludes adjustments for vessel capacity constraints and fiscal year-to-date actual data.

# Washington State Ferries — Ridership History and Forecast Trends

June 2020 Forecast – Fiscal Years 2008-2029



Transportation Revenue  
Forecast Council  
Alternative Motor Vehicle Fuel Forecasts  
Optimistic #1 & Pessimistic #2  
June 2020 Transportation  
Economic and Revenue Forecasts

Volume III: Alternative Forecast Tables

**Motor Vehicle Fuel Tax Revenue Forecast  
June 2020  
Optimistic Alternative Forecasts #1  
10% Higher Consumption in FY 2021 than  
June 2020 Baseline Forecast**

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**Transportation Revenue Forecast Council**

**Table A. 1. Washington Motor Fuel Consumption Fiscal Year Forecast**

**June 2020 - Optimistic Alternative Forecast #1 - 10% Higher Consumption in FY 2021 than June 2020 Baseline forecast**

	2012	2013	2014	2015	2016	2017	2018	2019	Current Biennium 2020
<b>Million Gallons</b>									
Gasoline (June 2020 Alt #1 Forecast)	2,663	2,676	2,716	2,757	2,844	2,887	2,966	2,905	2,734
Annual Percentage Change	-0.9%	0.5%	1.5%	1.5%	3.1%	1.5%	2.8%	-2.1%	-5.9%
Gasoline (June 2020 Baseline)	2,663	2,676	2,716	2,757	2,844	2,887	2,966	2,905	2,937
Percentage Change, June Baseline vs June Alt #1	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-6.9%
Diesel (June 2020 Alt #1 Forecast)	647	638	656	663	676.2	675	678	689	710
Annual Percentage Change	-2.5%	-1.4%	3.0%	1.0%	2.0%	-0.2%	0.5%	1.5%	3.1%
Diesel (June 2020 Baseline)	647	638	656	663	676.2	675	678	689	729
Percentage Change, June Baseline vs June Alt #1	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-2.6%
Total Motor Fuel (June 2020 Alt #1 Forecast)	3,309	3,313	3,373	3,420	3,520	3,562	3,645	3,593	3,445
Annual Percentage Change	-1.2%	0.1%	1.8%	1.4%	2.9%	1.2%	2.3%	-1.4%	-4.1%
Total Motor Fuel (June 2020 Baseline)	3,309	3,313	3,373	3,420	3,520	3,562	3,645	3,593	3,666
Percentage Change, June Baseline vs June Alt #1	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-6.0%
	<b>Current Biennium</b>								
	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>
<b>Million Gallons</b>									
Gasoline (June 2020 Alt #1 Forecast)	3,105	3,182	3,219	3,247	3,270	3,288	3,304	3,320	3,334
Annual Percentage Change	13.6%	2.5%	1.2%	0.9%	0.7%	0.5%	0.5%	0.5%	0.4%
Gasoline (June 2020 Baseline)	2,823	2,892	2,926	2,951	2,973	2,989	3,004	3,018	3,031
Percentage Change, June Baseline vs June Alt #1	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
Diesel (June 2020 Alt #1 Forecast)	797	816	830	844	857	871	885	900	915
Annual Percentage Change	12.3%	2.4%	1.7%	1.7%	1.6%	1.6%	1.6%	1.7%	1.7%
Diesel (June 2020 Baseline)	725	742	754	767	779	791	804	818	831
Percentage Change, June Baseline vs June Alt #1	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
Total Motor Fuel (June 2020 Alt #1 Forecast)	3,902	3,998	4,049	4,090	4,127	4,158	4,189	4,220	4,248
Annual Percentage Change	13.3%	2.5%	1.3%	1.0%	0.9%	0.8%	0.8%	0.7%	0.7%
Total Motor Fuel (June 2020 Baseline)	3,547	3,635	3,681	3,718	3,752	3,780	3,808	3,836	3,862
Percentage Change, June Baseline vs June Alt #1	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%

Transportation Revenue Forecast Council

Table A. 2. Motor Vehicle Fuel Tax Forecast to Forecast Biennial Comparison  
Based on Month of Collection

June 2020 - Optimistic Alternative Forecast #1 - 10% Higher Consumption than June 2020 Baseline forecast

June 2020 - Optimistic Alternative Forecast #1 - 10% Higher Consumption in FY 2021 than June 2020 Baseline forecast	Current Biennium				2021-2023 Biennium June Alt #1 Fct	2021-2023 Biennium June Baseline	Difference	
	2019-2021 Biennium June Alt #1 Fct	2019-2021 Biennium June Baseline	Value	Percentage			Value	Percentage
<b>Gross Fuel Tax</b>	\$3,638,282,500	\$3,447,121,000	\$191,161,500	5.55%	\$3,978,943,500	\$3,617,179,000	\$361,764,500	10.00%
<b>Gross Gasoline Tax</b>	\$2,890,587,000	\$2,738,839,300	\$151,747,700	5.54%	\$3,164,605,300	\$2,876,850,400	\$287,754,900	10.00%
<b>Gross Special Fuel Tax</b>	\$747,695,400	\$708,281,900	\$39,413,500	5.56%	\$814,338,200	\$740,328,600	\$74,009,600	10.00%
Less: Refunds and Transfers	\$240,800,800	\$234,369,500	\$6,431,300	2.74%	\$256,026,600	\$242,748,100	\$13,278,500	5.47%
Less: Distributions for Local Uses	\$280,101,600	\$266,068,300	\$14,033,300	5.27%	\$307,642,200	\$278,702,900	\$28,939,300	10.38%
Less: Distributions for State Uses	\$143,548,800	\$136,344,000	\$7,204,800	5.28%	\$157,943,900	\$143,086,400	\$14,857,500	10.38%
Less: MVFT Distributions to Cities & Counties	\$506,439,000	\$481,043,400	\$25,395,600	5.28%	\$556,022,500	\$503,652,000	\$52,370,500	10.40%
<b>Net to Nickel Account</b>	\$341,032,200	\$323,946,200	\$17,086,000	5.27%	\$374,563,800	\$339,329,200	\$35,234,600	10.38%
<b>Net to Transportation Partnership Account</b>	\$579,755,000	\$550,708,800	\$29,046,200	5.27%	\$636,758,800	\$576,860,000	\$59,898,800	10.38%
<b>Net to Connecting Washington Account</b>	\$811,656,700	\$770,992,000	\$40,664,700	5.27%	\$891,461,800	\$807,603,500	\$83,858,300	10.38%
<b>Net to Motor Vehicle Fund (WSDOT)</b>	\$734,948,400	\$683,648,800	\$51,299,600	7.50%	\$798,524,000	\$725,197,100	\$73,326,900	10.11%
<b>June 2020 - Optimistic Alternative Forecast #1 - 10% Higher Consumption in FY 2021 than June 2020 Baseline forecast</b>	<b>2023-2025 Biennium June Alt #1 Fct</b>	<b>2023-2025 Biennium June Baseline</b>	<b>Difference Value</b>	<b>Percentage</b>	<b>2025-2027 Biennium June Alt #1 Fct</b>	<b>2025-2027 Biennium June Baseline</b>	<b>Difference Value</b>	<b>Percentage</b>
<b>Gross Fuel Tax</b>	\$4,062,146,900	\$3,692,865,200	\$369,281,700	10.00%	\$4,126,241,500	\$3,751,154,900	\$375,086,600	10.00%
<b>Gross Gasoline Tax</b>	\$3,221,098,000	\$2,928,290,700	\$292,807,300	10.00%	\$3,257,876,600	\$2,961,698,900	\$296,177,700	10.00%
<b>Gross Special Fuel Tax</b>	\$841,048,700	\$764,574,400	\$76,474,300	10.00%	\$868,364,900	\$789,456,000	\$78,908,900	10.00%
Less: Refunds and Transfers	\$261,382,000	\$247,816,700	\$13,565,300	5.47%	\$266,081,400	\$252,291,200	\$13,790,200	5.47%
Less: Distributions for Local Uses	\$314,123,300	\$284,575,400	\$29,547,900	10.38%	\$319,013,900	\$289,000,100	\$30,013,800	10.39%
Less: Distributions for State Uses	\$161,271,300	\$146,101,400	\$15,169,900	10.38%	\$163,782,200	\$148,373,100	\$15,409,100	10.39%
Less: MVFT Distributions to Cities & Counties	\$567,751,100	\$514,279,300	\$53,471,800	10.40%	\$576,601,400	\$522,286,600	\$54,314,800	10.40%
<b>Net to Nickel Account</b>	\$382,454,700	\$346,479,200	\$35,975,500	10.38%	\$388,409,200	\$351,866,500	\$36,542,700	10.39%
<b>Net to Transportation Partnership Account</b>	\$650,173,300	\$589,015,000	\$61,158,300	10.38%	\$660,295,900	\$598,173,300	\$62,122,600	10.39%
<b>Net to Connecting Washington Account</b>	\$910,242,300	\$824,620,600	\$85,621,700	10.38%	\$924,413,800	\$837,442,300	\$86,971,500	10.39%
<b>Net to Motor Vehicle Fund (WSDOT)</b>	\$814,748,900	\$739,977,700	\$74,771,200	10.10%	\$827,643,500	\$751,721,700	\$75,921,800	10.10%
<b>June 2020 - Optimistic Alternative Forecast #1 - 10% Higher Consumption in FY 2021 than June 2020 Baseline forecast</b>	<b>2027-2029 Biennium June Alt #1 Fct</b>	<b>2027-2029 Biennium June Baseline</b>	<b>Difference Value</b>	<b>Percentage</b>				
<b>Gross Fuel Tax</b>	\$4,185,335,000	\$3,804,858,100	\$380,476,900	10.00%				
<b>Gross Gasoline Tax</b>	\$3,287,917,900	\$2,989,012,200	\$298,905,700	10.00%				
<b>Gross Special Fuel Tax</b>	\$897,417,000	\$815,845,900	\$81,571,100	10.00%				
Less: Refunds and Transfers	\$270,746,300	\$256,735,700	\$14,010,600	5.46%				
Less: Distributions for Local Uses	\$323,506,600	\$293,059,600	\$30,447,000	10.39%				
Less: Distributions for State Uses	\$166,088,700	\$150,457,200	\$15,631,500	10.39%				
Less: MVFT Distributions to Cities & Counties	\$584,731,700	\$529,632,800	\$55,098,900	10.40%				
<b>Net to Nickel Account</b>	\$393,879,200	\$356,808,900	\$37,070,300	10.39%				
<b>Net to Transportation Partnership Account</b>	\$669,595,000	\$606,575,500	\$63,019,500	10.39%				
<b>Net to Connecting Washington Account</b>	\$937,432,600	\$849,205,300	\$88,227,300	10.39%				
<b>Net to Motor Vehicle Fund (WSDOT)</b>	\$839,354,500	\$762,383,300	\$76,971,200	10.10%				



Transportation Revenue Forecast Council

Table A. 3. Motor Vehicle Fuel Tax Forecast By Fiscal Year

Based on Month of Collection

June 2020 - Optimistic Alternative Forecast #1 - 10% Higher Consumption in FY 2021 than June 2020 Baseline forecast

These fiscal year totals will not match the fiscal year totals in Table A.5. because these totals are by month of collection while the totals in Table A.5 are by month of distribution.

	Fiscal Year 2018	Fiscal Year 2019	Fiscal Year 2020	Fiscal Year 2021	Fiscal Year 2022
<b>Gross Fuel Tax</b>	\$1,777,088,026	\$1,807,140,289	\$1,656,203,700	\$1,982,078,800	\$1,977,169,400
<b>Gross Gasoline Tax</b>	\$1,446,709,688	\$1,457,514,350	\$1,314,837,500	\$1,575,749,500	\$1,573,339,000
<b>Gross Special Fuel Tax</b>	\$330,378,338	\$349,625,939	\$341,366,100	\$406,329,300	\$403,830,400
Less: Refunds and Transfers	\$107,579,132	\$121,288,654	\$116,392,700	\$124,408,100	\$127,277,200
Less: Distributions for Local Uses	\$139,994,701	\$136,764,131	\$130,928,100	\$149,173,500	\$152,850,600
Less: Distributions for State Uses	\$71,645,737	\$69,801,202	\$66,962,900	\$76,585,900	\$78,473,700
Less: MVFT Distributions to Cities & Counties	\$253,217,854	\$247,557,571	\$236,838,400	\$269,600,600	\$276,255,000
<b>Net to Nickel Account</b>	\$170,447,830	\$168,575,324	\$159,408,900	\$181,623,300	\$186,100,300
<b>Net to Transportation Partnership Account</b>	\$289,761,447	\$283,074,804	\$270,995,300	\$308,759,700	\$316,370,700
<b>Net to Connecting Washington Account</b>	\$405,665,835	\$396,304,540	\$379,393,300	\$432,263,400	\$442,918,700
<b>Net to Motor Vehicle Fund</b>	\$338,775,490	\$383,774,063	\$295,284,100	\$439,664,300	\$396,923,300
	Fiscal Year 2024	Fiscal Year 2025	Fiscal Year 2026	Fiscal Year 2027	Fiscal Year 2028
<b>Gross Fuel Tax</b>	\$2,022,038,400	\$2,040,108,500	\$2,055,432,700	\$2,070,808,800	\$2,085,713,000
<b>Gross Gasoline Tax</b>	\$1,604,788,300	\$1,616,309,700	\$1,624,793,800	\$1,633,082,800	\$1,640,667,400
<b>Gross Special Fuel Tax</b>	\$417,250,000	\$423,798,700	\$430,638,900	\$437,726,000	\$445,045,500
Less: Refunds and Transfers	\$130,066,000	\$131,316,000	\$132,459,300	\$133,622,100	\$134,783,900
Less: Distributions for Local Uses	\$156,362,300	\$157,761,000	\$158,923,000	\$160,090,900	\$161,221,100
Less: Distributions for State Uses	\$80,276,600	\$80,994,700	\$81,591,300	\$82,190,900	\$82,771,100
Less: MVFT Distributions to Cities & Counties	\$282,610,000	\$285,141,100	\$287,244,000	\$289,357,400	\$291,402,700
<b>Net to Nickel Account</b>	\$190,375,900	\$192,078,800	\$193,493,700	\$194,915,500	\$196,291,600
<b>Net to Transportation Partnership Account</b>	\$323,639,200	\$326,534,100	\$328,939,400	\$331,356,500	\$333,695,900
<b>Net to Connecting Washington Account</b>	\$453,094,700	\$457,147,600	\$460,514,900	\$463,898,900	\$467,174,100
<b>Net to Motor Vehicle Fund</b>	\$405,613,700	\$409,135,200	\$412,267,000	\$415,376,500	\$418,372,400

**Motor Vehicle Fuel Tax Revenue Forecast  
June 2020  
Pessimistic Alternative Forecasts #2  
10% Lower Consumption in FY 2021 than  
June 2020 Baseline Forecast**

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**Transportation Revenue Forecast Council**

**Table A. 1. Washington Motor Fuel Consumption Fiscal Year Forecast**

**June 2020 - Pessimistic Alternative Forecast #2 - 10% lower Consumption in FY 2021 than June 2020 Baseline forecast**

	2012	2013	2014	2015	2016	2017	2018	2019	Current Biennium 2020
<b>Million Gallons</b>									
Gasoline (June 2020 Alt #2 Forecast)	2,663	2,676	2,716	2,757	2,844	2,887	2,966	2,905	2,734
Annual Percentage Change	-0.9%	0.5%	1.5%	1.5%	3.1%	1.5%	2.8%	-2.1%	-5.9%
Gasoline (June 2020 Baseline)	2,663	2,676	2,716	2,757	2,844	2,887	2,966	2,905	2,937
Percentage Change, June Baseline vs June Alt #2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-6.9%
Diesel (June 2020 Alt #2 Forecast)	647	638	656	663	676.2	675	678	689	710
Annual Percentage Change	-2.5%	-1.4%	3.0%	1.0%	2.0%	-0.2%	0.5%	1.5%	3.1%
Diesel (June 2020 Baseline)	647	638	656	663	676.2	675	678	689	729
Percentage Change, June Baseline vs June Alt #2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-2.6%
Total Motor Fuel (June 2020 Alt #2Forecast)	3,309	3,313	3,373	3,420	3,520	3,562	3,645	3,593	3,445
Annual Percentage Change	-1.2%	0.1%	1.8%	1.4%	2.9%	1.2%	2.3%	-1.4%	-4.1%
Total Motor Fuel (June 2020 Baseline)	3,309	3,313	3,373	3,420	3,520	3,562	3,645	3,593	3,666
Percentage Change, June Baseline vs June Alt #2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-6.0%
	<b>Current Biennium</b>								
	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>
<b>Million Gallons</b>									
Gasoline (June 2020 Alt #2 Forecast)	2,540	2,603	2,634	2,656	2,676	2,690	2,704	2,716	2,728
Annual Percentage Change	-7.1%	2.5%	1.2%	0.9%	0.7%	0.5%	0.5%	0.5%	0.4%
Gasoline (June 2020 Baseline)	2,823	2,892	2,926	2,951	2,973	2,989	3,004	3,018	3,031
Percentage Change, June Baseline vs June Alt #2	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%
Diesel (June 2020 Alt #2 Forecast)	652	668	679	690	701	712	724	736	748
Annual Percentage Change	-8.2%	2.4%	1.7%	1.7%	1.6%	1.6%	1.6%	1.7%	1.7%
Diesel (June 2020 Baseline)	725	742	754	767	779	791	804	818	831
Percentage Change, June Baseline vs June Alt #2	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%
Total Motor Fuel (June 2020 Alt #2Forecast)	3,193	3,271	3,312	3,346	3,377	3,402	3,428	3,452	3,476
Annual Percentage Change	-7.3%	2.5%	1.3%	1.0%	0.9%	0.8%	0.8%	0.7%	0.7%
Total Motor Fuel (June 2020 Baseline)	3,547	3,635	3,681	3,718	3,752	3,780	3,808	3,836	3,862
Percentage Change, June Baseline vs June Alt #2	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%	-10.0%

Transportation Revenue Forecast Council

Table A. 2. Motor Vehicle Fuel Tax Forecast to Forecast Biennial Comparison

Based on Month of Collection

June 2020 - Pessimistic Alternative Forecast #2 - 10% lower Consumption in FY 2021 than June 2020 Baseline forecast

These will not match biennial totals in Table A.4. because these totals are by month of collection while the Table A.4 biennial comparison tables are by month of distribution.

June 2020 - Pessimistic Alternative Forecast #2 - 10% lower Consumption in FY 2021 than June 2020 Baseline forecast	Current Biennium				2021-2023 Biennium June Alt #2 Fct	2021-2023 Biennium June 2020	Difference	
	2019-2021 Biennium June Alt #2 Fct	2019-2021 Biennium June 2020	Value	Percentage			Value	Percentage
Gross Fuel Tax	\$3,255,963,900	\$3,447,121,000	(\$191,157,100)	-5.55%	\$3,255,509,700	\$3,617,179,000	(\$361,669,300)	-10.00%
Gross Gasoline Tax	\$2,587,095,600	\$2,738,839,300	(\$151,743,700)	-5.54%	\$2,589,185,900	\$2,876,850,400	(\$287,664,500)	-10.00%
Gross Special Fuel Tax	\$668,868,300	\$708,281,900	(\$39,413,600)	-5.56%	\$666,323,800	\$740,328,600	(\$74,004,800)	-10.00%
Less: Refunds and Transfers	\$227,938,200	\$234,369,500	(\$6,431,300)	-2.74%	\$229,473,100	\$242,748,100	(\$13,275,000)	-5.47%
Less: Distributions for Local Uses	\$252,034,900	\$266,068,300	(\$14,033,400)	-5.27%	\$249,771,400	\$278,702,900	(\$28,931,500)	-10.38%
Less: Distributions for State Uses	\$129,139,300	\$136,344,000	(\$7,204,700)	-5.28%	\$128,233,000	\$143,086,400	(\$14,853,400)	-10.38%
Less: MVFT Distributions to Cities & Counties	\$455,647,800	\$481,043,400	(\$25,395,600)	-5.28%	\$451,295,900	\$503,652,000	(\$52,356,100)	-10.40%
Net to Nickel Account	\$306,860,200	\$323,946,200	(\$17,086,000)	-5.27%	\$304,104,300	\$339,329,200	(\$35,224,900)	-10.38%
Net to Transportation Partnership Account	\$521,662,600	\$550,708,800	(\$29,046,200)	-5.27%	\$516,977,500	\$576,860,000	(\$59,882,500)	-10.38%
Net to Connecting Washington Account	\$730,327,300	\$770,992,000	(\$40,664,700)	-5.27%	\$723,768,200	\$807,603,500	(\$83,835,300)	-10.38%
Net to Motor Vehicle Fund (WSDOT)	\$632,353,600	\$683,648,800	(\$51,295,200)	-7.50%	\$651,886,500	\$725,197,100	(\$73,310,600)	-10.11%
June 2020 - Pessimistic Alternative Forecast #2 - 10% lower Consumption in FY 2021 than June 2020 Baseline forecast	2023-2025 Biennium June Alt #2 Fct	2023-2025 Biennium June 2020	Difference		2025-2027 Biennium June Alt #2 Fct	2025-2027 Biennium June 2020	Difference	
			Value	Percentage			Value	Percentage
Gross Fuel Tax	\$3,323,582,400	\$3,692,865,200	(\$369,282,800)	-10.00%	\$3,376,068,800	\$3,751,154,900	(\$375,086,100)	-10.00%
Gross Gasoline Tax	\$2,635,442,500	\$2,928,290,700	(\$292,848,200)	-10.00%	\$2,665,566,400	\$2,961,698,900	(\$296,132,500)	-10.00%
Gross Special Fuel Tax	\$688,139,900	\$764,574,400	(\$76,434,500)	-10.00%	\$710,502,400	\$789,456,000	(\$78,953,600)	-10.00%
Less: Refunds and Transfers	\$234,251,400	\$247,816,700	(\$13,565,300)	-5.47%	\$238,500,800	\$252,291,200	(\$13,790,400)	-5.47%
Less: Distributions for Local Uses	\$255,027,500	\$284,575,400	(\$29,547,900)	-10.38%	\$258,986,400	\$289,000,100	(\$30,013,700)	-10.39%
Less: Distributions for State Uses	\$130,931,400	\$146,101,400	(\$15,170,000)	-10.38%	\$132,963,900	\$148,373,100	(\$15,409,200)	-10.39%
Less: MVFT Distributions to Cities & Counties	\$460,807,500	\$514,279,300	(\$53,471,800)	-10.40%	\$467,971,900	\$522,286,600	(\$54,314,700)	-10.40%
Net to Nickel Account	\$310,503,700	\$346,479,200	(\$35,975,500)	-10.38%	\$315,323,800	\$351,866,500	(\$36,542,700)	-10.39%
Net to Transportation Partnership Account	\$527,856,600	\$589,015,000	(\$61,158,400)	-10.38%	\$536,050,800	\$598,173,300	(\$62,122,500)	-10.39%
Net to Connecting Washington Account	\$738,998,900	\$824,620,600	(\$85,621,700)	-10.38%	\$750,470,800	\$837,442,300	(\$86,971,500)	-10.39%
Net to Motor Vehicle Fund (WSDOT)	\$665,205,300	\$739,977,700	(\$74,772,400)	-10.10%	\$675,800,400	\$751,721,700	(\$75,921,300)	-10.10%
June 2020 - Pessimistic Alternative Forecast #2 - 10% lower Consumption in FY 2021 than June 2020 Baseline forecast	2027-2029 Biennium June Alt #2 Fct	2027-2029 Biennium June 2020	Difference					
			Value	Percentage				
Gross Fuel Tax	\$3,424,332,300	\$3,804,858,100	(\$380,525,800)	-10.00%				
Gross Gasoline Tax	\$2,690,102,200	\$2,989,012,200	(\$298,910,000)	-10.00%				
Gross Special Fuel Tax	\$734,230,000	\$815,845,900	(\$81,615,900)	-10.00%				
Less: Refunds and Transfers	\$242,723,000	\$256,735,700	(\$14,012,700)	-5.46%				
Less: Distributions for Local Uses	\$262,608,400	\$293,059,600	(\$30,451,200)	-10.39%				
Less: Distributions for State Uses	\$134,823,500	\$150,457,200	(\$15,633,700)	-10.39%				
Less: MVFT Distributions to Cities & Counties	\$474,526,600	\$529,632,800	(\$55,106,200)	-10.40%				
Net to Nickel Account	\$319,733,800	\$356,808,900	(\$37,075,100)	-10.39%				
Net to Transportation Partnership Account	\$543,547,700	\$606,575,500	(\$63,027,800)	-10.39%				
Net to Connecting Washington Account	\$760,966,400	\$849,205,300	(\$88,238,900)	-10.39%				
Net to Motor Vehicle Fund (WSDOT)	\$685,402,700	\$762,383,300	(\$76,980,600)	-10.10%				

Transportation Revenue Forecast Council

Table A. 3. Motor Vehicle Fuel Tax Forecast By Fiscal Year

Based on Month of Collection

June 2020 - Pessimistic Alternative Forecast #2 - 10% lower Consumption in FY 2021 than June 2020 Baseline forecast

These fiscal year totals will not match the fiscal year totals in Table A.5. because these totals are by month of collection while the totals in Table A.5 are by month of distribution.

	Fiscal Year 2018	Fiscal Year 2019	Fiscal Year 2020	Fiscal Year 2021	Fiscal Year 2022
<b>Gross Fuel Tax</b>	\$1,777,088,026	\$1,807,140,289	\$1,634,262,600	\$1,621,701,300	\$1,617,688,900
<b>Gross Gasoline Tax</b>	\$1,446,709,688	\$1,457,514,350	\$1,297,846,400	\$1,289,249,200	\$1,287,270,600
<b>Gross Special Fuel Tax</b>	\$330,378,338	\$349,625,939	\$336,416,200	\$332,452,100	\$330,418,300
Less: Refunds and Transfers	\$107,579,132	\$121,288,654	\$116,392,700	\$111,545,500	\$114,085,100
Less: Distributions for Local Uses	\$139,994,701	\$136,764,131	\$130,928,100	\$121,106,800	\$124,097,100
Less: Distributions for State Uses	\$71,645,737	\$69,801,202	\$66,962,900	\$62,176,400	\$63,711,600
Less: MVFT Distributions to Cities & Counties	\$253,217,854	\$247,557,571	\$236,838,400	\$218,809,400	\$224,220,800
<b>Net to Nickel Account</b>	\$170,447,830	\$168,575,324	\$159,408,900	\$147,451,300	\$151,092,000
<b>Net to Transportation Partnership Account</b>	\$289,761,447	\$283,074,804	\$270,995,300	\$250,667,300	\$256,856,400
<b>Net to Connecting Washington Account</b>	\$405,665,835	\$396,304,540	\$379,393,300	\$350,934,000	\$359,598,900
<b>Net to Motor Vehicle Fund</b>	\$338,775,490	\$383,774,063	\$273,343,000	\$359,010,600	\$324,027,100
	Fiscal Year 2024	Fiscal Year 2025	Fiscal Year 2026	Fiscal Year 2027	Fiscal Year 2028
<b>Gross Fuel Tax</b>	\$1,654,410,100	\$1,669,172,300	\$1,681,730,300	\$1,694,338,500	\$1,706,489,900
<b>Gross Gasoline Tax</b>	\$1,312,997,100	\$1,322,445,400	\$1,329,398,000	\$1,336,168,400	\$1,342,378,300
<b>Gross Special Fuel Tax</b>	\$341,413,000	\$346,726,900	\$352,332,300	\$358,170,100	\$364,111,500
Less: Refunds and Transfers	\$116,564,900	\$117,686,500	\$118,723,200	\$119,777,600	\$120,827,500
Less: Distributions for Local Uses	\$126,948,700	\$128,078,800	\$129,019,800	\$129,966,600	\$130,876,200
Less: Distributions for State Uses	\$65,175,600	\$65,755,800	\$66,238,900	\$66,725,000	\$67,192,000
Less: MVFT Distributions to Cities & Counties	\$229,381,200	\$231,426,300	\$233,129,200	\$234,842,700	\$236,488,800
<b>Net to Nickel Account</b>	\$154,563,900	\$155,939,800	\$157,085,500	\$158,238,300	\$159,345,800
<b>Net to Transportation Partnership Account</b>	\$262,758,800	\$265,097,800	\$267,045,500	\$269,005,300	\$270,888,000
<b>Net to Connecting Washington Account</b>	\$367,862,100	\$371,136,800	\$373,863,500	\$376,607,300	\$379,243,000
<b>Net to Motor Vehicle Fund</b>	\$331,154,900	\$334,050,400	\$336,624,800	\$339,175,600	\$341,628,500

# **Alternative Enhanced Drivers' License Forecast**

**June 2020**

**Comparison of Alternative EDL/EID Forecasts to the Baseline Forecast**

	<u>FY2018</u>	<u>FY 2019</u>	<u>FY 2020</u>	<u>FY 2021</u>	<u>FY 2022</u>	<u>FY 2023</u>	<u>FY 2024</u>	<u>FY 2025</u>	<u>FY 2026</u>	<u>FY 2027</u>	<u>FY 2028</u>	<u>FY 2029</u>
<b>June2020 Baseline Forecast (Adjusted DP)</b>	<b>\$ 4,361,952</b>	<b>\$ 5,154,322</b>	<b>\$ 8,107,000</b>	<b>\$ 15,098,000</b>	<b>\$ 19,829,000</b>	<b>\$ 17,988,000</b>	<b>\$ 16,537,000</b>	<b>\$ 17,094,000</b>	<b>\$ 18,420,000</b>	<b>\$ 19,836,000</b>	<b>\$ 19,001,000</b>	<b>\$ 18,826,000</b>
<b>Alternative A: Sep. 2017 DP</b>	\$ 16,896,000	\$ 28,227,000	\$ 20,999,000	\$ 24,148,000	\$ 22,128,000	\$ 20,540,000	\$ 20,473,000	\$ 21,929,000	\$ 21,978,000	\$ 22,668,000	\$ 22,696,000	\$ 22,737,000
<b>\$ Difference from Baseline</b>	\$ 12,534,048	\$ 23,072,678	\$ 12,892,000	\$ 9,050,000	\$ 2,299,000	\$ 2,552,000	\$ 3,936,000	\$ 4,835,000	\$ 3,558,000	\$ 2,832,000	\$ 3,695,000	\$ 3,911,000
	287%	448%	159%	60%	12%	14%	24%	28%	19%	14%	19%	21%
<b>Alternative B: Pre-DP Estimate</b>	\$ 4,361,952	\$ 5,154,322	\$ 8,107,000	\$ 11,407,000	\$ 15,092,000	\$ 13,791,000	\$ 12,679,000	\$ 13,105,000	\$ 14,122,000	\$ 15,208,000	\$ 14,567,000	\$ 14,433,000
<b>Difference from baseline</b>	\$ -	\$ -	\$ -	\$ (3,691,000)	\$ (4,737,000)	\$ (4,197,000)	\$ (3,858,000)	\$ (3,989,000)	\$ (4,298,000)	\$ (4,628,000)	\$ (4,434,000)	\$ (4,393,000)
<b>% Difference</b>	0%	0%	0%	-24%	-24%	-23%	-23%	-23%	-23%	-23%	-23%	-23%

June 2020 Baseline Estimates: This is essentially the funded DP estimates, with adjustments to FY2020 to reflect year to date actual.

Alternative A: Sept. 2017 DP Estimates reflects DOL's 2017 Decision Package request to build capacity for much higher anticipated EDL demand. Two major assumptions are behind the estimates. 1) The July 1 2018 marking of "not valide for Federal purposes" would have a big impact for EDL demand; 2) DOL's public campaign would start immediately **and** would be a call for action to encourage customers to get EDL. FY19 is corrected by removing \$5 million none EDL revenue out of the total.

## **Initiative I-976**

# **Alternative June 2020 Transportation Revenue Forecast Revenues Without the Impact from I-976 FISCAL YEARS 2020 – 2029**

Prepared for  
**Transportation Revenue  
Forecast Council (TRFC)**

June 18, 2020 Adoption Meeting



## I-976 FISCAL IMPACT SUMMARY

Initiative I-976 was passed by voters on November 5<sup>th</sup>, 2019. The impact to transportation revenue has both state and local impacts. This summary is focused primarily on the state impacts. This summarizes the state impacts by revenue source and impacted transportation accounts. The **Baseline** June 2020 TRFC forecast includes the following I-976 state revenue reduction impacts. This June 2020 **Alternative** revenue forecast provides the state revenues if the measure had not adopted by voters. The following documents provide the state transportation revenues projected in February, excluding the impact of I-976, and the difference from the **Baseline** June 2020 TRFC forecast.

### I-976 State Impacts

#### *Revenue Sources Impacted*

- Reduces vehicle taxes and fees by lowering motor vehicle and light duty truck weight fees to \$30;
- Eliminates the passenger weight fee;
- Eliminates the 0.3 percent sales tax on vehicle purchases;
- Reduces commercial trailer fees to \$30;
- Snowmobile fees are reduced to \$30;
- Lowers electric vehicle fees to \$30;

The effective date of the initiative is December 5, 2019

#### *State Transportation Accounts Impacted*

State Highway Funding	Local Highway Funding
<ul style="list-style-type: none"> <li>○ Motor Vehicle Account</li> <li>○ Transportation Partnership Account</li> <li>○ Nickel Account</li> </ul>	<ul style="list-style-type: none"> <li>○ Rural Arterial Trust Account</li> <li>○ Transportation Improvement Account</li> </ul>
Ferry Operating funding	Washington State Patrol
<ul style="list-style-type: none"> <li>○ Puget Sound Ferry Operations</li> </ul>	<ul style="list-style-type: none"> <li>○ WSP Highway Account</li> </ul>
Multimodal Funding	Snowmobile Funding
<ul style="list-style-type: none"> <li>○ Multimodal Account</li> </ul>	<ul style="list-style-type: none"> <li>○ Snowmobile Account</li> </ul>

# State Impact of Removing I-976 Reductions

**June 2020 Alt. Forecast Revenue (Without I-976 Impacts)**  
**\$ in millions**

*Partial Yr*

	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029
Commercial Trailers paying \$34 Registration Fee to \$30	\$ 3.26	\$ 3.33	\$ 3.37	\$ 3.40	\$ 3.45	\$ 3.50	\$ 3.55	\$ 3.58	\$ 3.62	\$ 3.66
Regular Snowmobile Registration Fees from \$50 to \$30	\$ 1.13	\$ 1.14	\$ 1.14	\$ 1.14	\$ 1.15	\$ 1.15	\$ 1.15	\$ 1.15	\$ 1.15	\$ 1.15
Trucks 10,000 lbs & under: Weight-based Registration Fee	\$ 109.49	\$ 111.02	\$ 112.13	\$ 112.91	\$ 114.04	\$ 115.30	\$ 116.52	\$ 117.44	\$ 118.39	\$ 119.28
Electric/Plug-in Vehicle Renewal Fee (\$100)	\$ 3.67	\$ 4.22	\$ 5.21	\$ 6.68	\$ 8.57	\$ 10.53	\$ 12.57	\$ 14.56	\$ 16.42	\$ 18.19
Additional Electric/Plug-in Renewal Fee (\$50)	\$ 1.84	\$ 2.11	\$ 2.60	\$ 3.34	\$ 4.28	\$ 5.27	\$ 6.29	\$ 7.28	\$ 8.21	\$ 9.09
Passenger Vehicle Weight Fees to \$0	\$ 158.77	\$ 163.13	\$ 165.49	\$ 225.19	\$ 228.71	\$ 232.15	\$ 235.67	\$ 239.07	\$ 242.36	\$ 245.56
Motor Home Weight Fee from \$75 to \$0	\$ 4.80	\$ 4.81	\$ 4.84	\$ 4.86	\$ 4.86	\$ 4.87	\$ 4.88	\$ 4.89	\$ 4.90	\$ 4.92
Motor Vehicle Sales Tax (Elimination 0.3%)	\$ 47.00	\$ 45.33	\$ 50.64	\$ 53.07	\$ 54.88	\$ 56.34	\$ 57.54	\$ 58.71	\$ 59.88	\$ 61.07
<b>Total</b>	<b>\$ 329.95</b>	<b>\$ 335.09</b>	<b>\$ 345.42</b>	<b>\$ 410.59</b>	<b>\$ 419.93</b>	<b>\$ 429.10</b>	<b>\$ 438.17</b>	<b>\$ 446.69</b>	<b>\$ 454.94</b>	<b>\$ 462.92</b>

**Change in Revenue From Baseline June 2020 Revenue  
(I-976 Impacts) \$ in millions**

*Partial Yr*

	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029
Commercial Trailers paying \$34 Registration Fee to \$30	\$ (0.19)	\$ (0.39)	\$ (0.40)	\$ (0.40)	\$ (0.41)	\$ (0.41)	\$ (0.42)	\$ (0.42)	\$ (0.43)	\$ (0.43)
Regular Snowmobile Registration Fees from \$50 to \$30	\$ (0.23)	\$ (0.45)	\$ (0.46)	\$ (0.46)	\$ (0.46)	\$ (0.46)	\$ (0.46)	\$ (0.46)	\$ (0.46)	\$ (0.46)
Trucks 10,000 lbs & under: Weight-based Registration Fee	\$ (34.32)	\$ (69.61)	\$ (70.31)	\$ (70.80)	\$ (71.50)	\$ (72.29)	\$ (73.06)	\$ (73.64)	\$ (74.23)	\$ (74.79)
Electric/Plug-in Vehicle Renewal Fee (\$100)	\$ (1.29)	\$ (2.94)	\$ (3.63)	\$ (4.65)	\$ (5.97)	\$ (7.33)	\$ (8.75)	\$ (10.14)	\$ (11.30)	\$ (12.26)
Additional Electric/Plug-in Renewal Fee (\$50)	\$ (1.07)	\$ (2.11)	\$ (2.60)	\$ (3.34)	\$ (4.28)	\$ (5.27)	\$ (6.29)	\$ (7.28)	\$ (8.21)	\$ (9.09)
Passenger Vehicle Weight Fees to \$0	\$ (80.04)	\$ (163.13)	\$ (165.49)	\$ (225.19)	\$ (228.71)	\$ (232.15)	\$ (235.67)	\$ (239.07)	\$ (242.36)	\$ (245.56)
Motor Home Weight Fee from \$75 to \$0	\$ (2.25)	\$ (4.81)	\$ (4.84)	\$ (4.86)	\$ (4.86)	\$ (4.87)	\$ (4.88)	\$ (4.89)	\$ (4.90)	\$ (4.92)
Motor Vehicle Sales Tax (Elimination 0.3%)	\$ (19.94)	\$ (45.33)	\$ (50.64)	\$ (53.07)	\$ (54.88)	\$ (56.34)	\$ (57.54)	\$ (58.71)	\$ (59.88)	\$ (61.07)
<b>Total</b>	<b>\$ (139.34)</b>	<b>\$ (288.78)</b>	<b>\$ (298.36)</b>	<b>\$ (362.76)</b>	<b>\$ (371.06)</b>	<b>\$ (379.12)</b>	<b>\$ (387.07)</b>	<b>\$ (394.61)</b>	<b>\$ (401.78)</b>	<b>\$ (408.58)</b>

## State Impact of Removing I-976 Reductions

**Change in Revenue (I-976 Impacts) From June 2020 Baseline Revenue By Account By Fiscal Year**  
**\$ in millions** *Partial Yr*

Impacted Accounts	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029
Snowmobile Account (01M)	\$ (0.22)	\$ (0.44)	\$ (0.44)	\$ (0.44)	\$ (0.44)	\$ (0.45)	\$ (0.45)	\$ (0.45)	\$ (0.45)	\$ (0.45)
WSP Highway Account (081)	\$ (7.72)	\$ (15.65)	\$ (15.81)	\$ (15.92)	\$ (16.08)	\$ (16.26)	\$ (16.43)	\$ (16.56)	\$ (16.69)	\$ (16.82)
Transportation Partnership Account (09H)	\$ (3.98)	\$ (8.07)	\$ (8.15)	\$ (8.21)	\$ (8.29)	\$ (8.38)	\$ (8.47)	\$ (8.54)	\$ (8.61)	\$ (8.68)
Rural Arterial Trust Account (102)	\$ (0.19)	\$ (0.44)	\$ (0.54)	\$ (0.70)	\$ (0.89)	\$ (1.10)	\$ (1.31)	\$ (1.52)	\$ (1.72)	\$ (1.90)
Motor Vehicle Account (108)	\$ (22.51)	\$ (45.83)	\$ (47.22)	\$ (48.97)	\$ (51.26)	\$ (53.67)	\$ (56.14)	\$ (58.45)	\$ (60.64)	\$ (62.73)
Puget Sound Ferry Operations (109)	\$ (0.47)	\$ (0.96)	\$ (0.97)	\$ (0.98)	\$ (0.99)	\$ (1.00)	\$ (1.01)	\$ (1.02)	\$ (1.03)	\$ (1.03)
Transportation Improvement Account (144)	\$ (0.19)	\$ (0.44)	\$ (0.54)	\$ (0.70)	\$ (0.89)	\$ (1.10)	\$ (1.31)	\$ (1.52)	\$ (1.72)	\$ (1.90)
Multimodal Account (218)	\$ (102.24)	\$ (213.28)	\$ (220.97)	\$ (283.12)	\$ (288.44)	\$ (293.36)	\$ (298.10)	\$ (302.68)	\$ (307.15)	\$ (311.54)
Nickel Account (550)	\$ (1.81)	\$ (3.67)	\$ (3.70)	\$ (3.73)	\$ (3.77)	\$ (3.81)	\$ (3.85)	\$ (3.88)	\$ (3.91)	\$ (3.94)
<b>Total</b>	\$ (139.34)	\$ (288.78)	\$ (298.36)	\$ (362.76)	\$ (371.06)	\$ (379.12)	\$ (387.07)	\$ (394.61)	\$ (401.91)	\$ (408.98)
Capron (San Juan and Island counties)	\$ (1.15)	\$ (2.37)	\$ (2.40)	\$ (2.51)	\$ (2.53)	\$ (2.55)	\$ (2.58)	\$ (2.60)	\$ (2.63)	\$ (2.65)

**Change in Revenue (I-976 Impacts) From June 2020 Baseline Revenue By Account By Biennium**  
**\$ in millions**

Impacted Accounts	2019-21	2021-23	2023-25	2025-27	2027-29	10-Year Total
Snowmobile Account (01M)	\$ (0.66)	\$ (0.88)	\$ (0.89)	\$ (0.89)	\$ (0.89)	\$ (4.22)
WSP Highway Account (081)	\$ (23.37)	\$ (31.73)	\$ (32.34)	\$ (32.99)	\$ (33.51)	\$ (153.93)
Transportation Partnership Account (09H)	\$ (12.05)	\$ (16.37)	\$ (16.68)	\$ (17.01)	\$ (17.29)	\$ (79.40)
Rural Arterial Trust Account (102)	\$ (0.63)	\$ (1.24)	\$ (1.99)	\$ (2.83)	\$ (3.61)	\$ (10.32)
Motor Vehicle Account (108)	\$ (68.34)	\$ (96.19)	\$ (104.92)	\$ (114.59)	\$ (123.37)	\$ (507.42)
Puget Sound Ferry Operations (109)	\$ (1.44)	\$ (1.95)	\$ (1.99)	\$ (2.03)	\$ (2.06)	\$ (9.47)
Transportation Improvement Account (144)	\$ (0.63)	\$ (1.24)	\$ (1.99)	\$ (2.83)	\$ (3.61)	\$ (10.32)
Multimodal Account (218)	\$ (315.52)	\$ (504.09)	\$ (581.81)	\$ (600.77)	\$ (618.69)	\$ (2,620.88)
Nickel Account (550)	\$ (5.47)	\$ (7.43)	\$ (7.57)	\$ (7.73)	\$ (7.85)	\$ (36.05)
<b>Total</b>	\$ (428.12)	\$ (661.12)	\$ (750.19)	\$ (781.68)	\$ (810.89)	\$ (3,432.01)
Capron (San Juan and Island counties)	\$ (3.53)	\$ (4.90)	\$ (5.08)	\$ (5.18)	\$ (5.28)	\$ (23.97)

# Comparison of June 2020 Impact of I-976 With Prior Forecasts

Impacts in Millions of \$

State Revenue Source	2019-21		2021-23		2023-25		2025-27		2027-29	
	June 20 fct	Feb 20 fct	June 20 fct	Feb 20 fct	June 20 fct	Feb 20 fct	June 20 fct	Feb 20 fct	June 20 fct	Feb 20 fct
Passenger & Other Vehicle Weight Fees	\$ (243.2)	(250.0)	\$ (390.7)	(400.8)	\$ (460.9)	(473.2)	\$ (474.7)	(487.6)	\$ (487.9)	(501.1)
Combined License Fees for Light Duty Trucks	(103.9)	(104.9)	(141.1)	(141.1)	(143.8)	(141.9)	(146.7)	(143.4)	(149.0)	(145.6)
Sales and Use Tax on New Vehicles	(65.3)	(80.4)	\$ (103.7)	(112.9)	\$ (111.2)	(117.9)	\$ (116.3)	(122.7)	\$ (121.0)	(127.4)
Electric Vehicle Fees	(7.4)	(8.9)	\$ (14.2)	(17.3)	\$ (22.8)	(25.1)	\$ (32.5)	(33.5)	\$ (40.9)	(41.3)
Motor Home Vehicle Weight Fee	(7.1)	(7.5)	\$ (9.7)	(10.2)	\$ (9.7)	(10.2)	\$ (9.8)	(10.2)	\$ (9.8)	(10.3)
Snowmobile Registration Fee	(0.7)	(0.7)	\$ (0.9)	(0.9)	\$ (0.9)	(0.9)	\$ (0.9)	(0.9)	\$ (0.9)	(0.9)
Commercial Trailers Registration Fee	(0.6)	(0.6)	\$ (0.8)	(0.8)	\$ (0.8)	(0.8)	\$ (0.8)	(0.8)	\$ (0.9)	(0.9)
<b>Total State Revenue Impacts</b>	<b>\$ (428.1)</b>	<b>\$ (453.0)</b>	<b>\$ (661.1)</b>	<b>\$ (684.0)</b>	<b>\$ (750.2)</b>	<b>\$ (770.2)</b>	<b>\$ (781.7)</b>	<b>\$ (799.2)</b>	<b>\$ (810.4)</b>	<b>\$ (827.5)</b>

Impacts in Millions of \$

State Revenue Source	2019-21		2021-23		2023-25		2025-27		2027-29	
	June 20 fct	June 19 fct	June 20 fct	June 19 fct	June 20 fct	June 19 fct	June 20 fct	June 19 fct	June 20 fct	June 19 fct
Passenger & Other Vehicle Weight Fees	\$ (243.2)	(267.1)	\$ (390.7)	(403.2)	\$ (460.9)	(474.1)	\$ (474.7)	(487.0)	\$ (487.9)	(499.7)
Combined License Fees for Light Duty Trucks	(103.9)	(113.7)	(141.1)	(139.7)	(143.8)	(140.4)	(146.7)	(142.1)	(149.0)	(144.7)
Sales and Use Tax on New Vehicles	(65.3)	(80.5)	\$ (103.7)	(112.4)	\$ (111.2)	(117.4)	\$ (116.3)	(122.0)	\$ (121.0)	(126.4)
Electric Vehicle Fees	(7.4)	(6.8)	\$ (14.2)	(13.1)	\$ (22.8)	(19.9)	\$ (32.5)	(27.5)	\$ (40.9)	(34.4)
Motor Home Vehicle Weight Fee	(7.1)	(8.2)	\$ (9.7)	(10.4)	\$ (9.7)	(10.5)	\$ (9.8)	(10.5)	\$ (9.8)	(10.6)
Snowmobile Registration Fee	(0.7)	(0.7)	\$ (0.9)	(0.9)	\$ (0.9)	(0.9)	\$ (0.9)	(0.9)	\$ (0.9)	(0.9)
Commercial Trailers Registration Fee	(0.6)	(0.6)	\$ (0.8)	(0.8)	\$ (0.8)	(0.8)	\$ (0.8)	(0.8)	\$ (0.9)	(0.8)
<b>Total State Revenue Impacts</b>	<b>\$ (428.1)</b>	<b>\$ (477.6)</b>	<b>\$ (661.1)</b>	<b>\$ (680.5)</b>	<b>\$ (750.2)</b>	<b>\$ (764.0)</b>	<b>\$ (781.7)</b>	<b>\$ (790.8)</b>	<b>\$ (810.4)</b>	<b>\$ (817.5)</b>

Change In Impacts From Prior Months

Impacts in Millions of \$

State Revenue Source	2019-21		2021-23		2023-25		2025-27		2027-29	
	Chg from Feb. 20	Chg from June	Chg from Feb. 20	Chg from June	Chg from Feb. 20	Chg from June	Chg from Feb. 20	Chg from June	Chg from Feb. 20	Chg from June
Passenger & Other Vehicle Weight Fees	\$ 6.9	23.9	\$ 10.1	12.5	\$ 12.3	13.2	\$ 12.8	12.3	\$ 13.2	11.8
Combined License Fees for Light Duty Trucks	\$ 0.9	9.8	\$ (0.0)	(1.4)	\$ (1.9)	(3.4)	\$ (3.3)	(4.6)	\$ (3.4)	(4.3)
Sales and Use Tax on New Vehicles	\$ 15.1	15.2	\$ 9.1	8.7	\$ 6.7	6.2	\$ 6.5	5.7	\$ 6.4	5.4
Electric Vehicle Fees	\$ 1.5	(0.6)	\$ 3.1	(1.1)	\$ 2.3	(2.9)	\$ 1.0	(5.0)	\$ 0.4	(6.5)
Motor Home Vehicle Weight Fee	\$ 0.4	1.1	\$ 0.5	0.7	\$ 0.5	0.8	\$ 0.5	0.7	\$ 0.5	0.8
Snowmobile Registration Fee	\$ 0.0	0.0	\$ 0.0	(0.0)	\$ 0.0	(0.0)	\$ 0.0	(0.0)	\$ 0.0	(0.0)
Commercial Trailers Registration Fee	\$ 0.0	0.0	\$ 0.0	0.0	\$ 0.0	(0.0)	\$ (0.0)	(0.0)	\$ (0.0)	(0.1)
<b>Total State Revenue Impacts</b>	<b>\$ 24.9</b>	<b>49.5</b>	<b>\$ 22.8</b>	<b>19.4</b>	<b>\$ 20.0</b>	<b>13.8</b>	<b>\$ 17.5</b>	<b>9.1</b>	<b>\$ 17.1</b>	<b>7.1</b>

## **I-976 Local Impacts**

This initiative has local impacts as well as state revenue impacts. The following summarizes the primary elements of the local transportation revenue impacts. At this time, the local impacts are more difficult to quantify due to the language in the initiative.

### *Revenue Sources Impacted*

- Eliminates local authority to impose a passenger – only ferry tax;
- Reduce the motor vehicle excise tax (MVET) that funds the Central Puget Sound Regional Transit Authority (RTA) commonly known as Sound Transit by decreasing the MVET rates from 0.8% to 0.2%;
  - This tax rate would be repealed when the RTA is able to refund, refinance or defease, or terminate, outstanding bonds that have been issued against this tax.
  - It is unknown if this is possible.
- Specifies that the Sound Transit MVET be calculated based on Kelley Blue Book vehicle value instead of the manufacturer’s suggested retail price;
- Eliminates Transportation Benefit districts (TBDs) authority to impose vehicle license fees
  - Fiscal year 2019 revenue impact TBD Fee equaled \$63.1 million