

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

# Transportation Revenue Forecast Council

## Alternative Forecasts

### November 2020

- Alternative Ferry Forecast.....III-3
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# **REVENUE AND RIDERSHIP PROJECTIONS**

## **NOVEMBER 2020 FORECAST**

### **FISCAL YEARS 2021-2029**

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

Prepared by  
WSP USA

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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 September 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

## November 2019 Revenue and Ridership Forecasts — Fiscal Years 2021-2029

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### NOVEMBER 2020 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 2019, the Washington State Transportation Commission adopted fares for FY 2020 that included 2.0% increases for passengers and 2.5% increases for vehicles on both October 1, 2019 and May 1, 2020. At the direction of the Legislature, a \$0.25 increase to the current capital surcharge was also adopted, effective May 1, 2020, for a total surcharge of \$0.50 per fare sold.

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. Ridership has been slowly recovering since then, though October 2020 levels remain 35% lower than 2019. For the November Forecast, the pandemic is assumed to continue dampening ridership through 2021, transitioning to a “new normal” by January 2022.

Since 2000, passenger and vehicle/driver frequent user discounted fare ridership has 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, telecommuting, and changes in the frequent user multi-ride fare media, reducing their severability for sharing. The November Forecast continues with the previous 15% and 10% reductions in longer-term passenger and vehicle commuter ridership, respectively, to account for more telecommuting going forward.

In addition, the entire system will continue running on the winter baseline season schedule (reduced service hours) with the Anacortes-Sidney, B.C. route assumed to remain out of service through late March 2021. The Seattle-Bremerton route is expected to operate with one less vessel through the end of October, with the Fauntleroy-Vashon-Southworth route down one vessel through the end of November.

These forecast assumptions are reflected in the Baseline and Alternative 1 Forecasts.

- **Baseline Forecast** – Assumes no further fare increases beyond that which occurred 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 2021 projections include actual ridership through October 2020 and revenue through September 2020.

### Ridership Impacts

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- The November 2020 Forecast incorporates the latest demographic and economic variable projections plus a COVID-19 indicator variable.
- The statewide forecasts for working age and retirement age population were both revised downward, contributing to lower ridership projections in some fare categories. Revised working- and retirement-age population indices for ferry served communities won't be available until the March 2021 Forecast.
- Beyond FY 2021, the real personal income forecast was revised lower, though lower population forecasts resulted in higher per-capita values. As a result, the impacts on the ridership forecasts were negligible.
- The employment forecasts have been revised lower beyond FY 2021. This has a dampening effect on ferry ridership demand.
- Upwardly revised inflation projections result in lower real fares over time, which contributes to slightly higher ridership demand over the forecast horizon.
- Forecasted real gasoline prices are slightly higher initially and slightly lower after FY 2023. Relative to past forecasts, the ferry demand effects are negligible.
- A COVID-19 pandemic indicator variable applied in the econometric models during 2020 captures ridership decreases not attributed to the above variables.
- Actual ridership for September was 5.3% higher than previously forecasted, split as 6.9% more passengers and 4.1% more vehicles/drivers. For October, ridership was 6.2% higher, with passengers 4.3% lower but vehicles/drivers 15.5% higher.

### Fare and Surcharge Revenue Impacts

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- Actual revenue for September 2020 was 8.5% higher than forecasted in September. This revenue percentage variance from forecast exceeds that for ridership, due to larger ridership variances in the higher, full fare categories.
- For the 2019-21 biennium, projected fare revenues for both the Baseline and Alternative 1 Forecasts total \$325.1 M, or \$3.4 M (1.1%) higher than the prior forecast, split as nearly \$315.6 M in base fare revenue and \$9.5 M in surcharges.
- The Baseline Forecast revenue projection for the 2021-23 biennium is \$410.9 M, which is unchanged from prior September forecast, with slightly over \$395.1 M in base fare revenue and nearly \$15.8 M in surcharges.
- The Alternative 1 Forecast revenue projection for the 2021-23 is \$420.5 M, which is \$0.2 M (0.1%) higher than projected in September, with \$404.8 M in base fare revenue and \$15.7 M in surcharge revenue.
- For FYs 2024-29, both forecast scenarios are essentially unchanged, with differences ranging from 0.1% lower to 0.2% higher than in September.

# Washington State Ferries

## REVENUE PROJECTIONS | NOVEMBER 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 2021-2029

Fiscal Year	November 2020 Capacity-Constrained Revenue Forecast	Fiscal Year Annual Rate of Change	November Biennium Total	November vs. September Forecast			September 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	\$166,825,103	(14.6%)		0.0%			\$166,825,103	
2021 <sup>2</sup>	\$158,241,000	(5.1%)	\$325,066,103	2.2%	\$3,435,000	1.1%	\$154,806,000	\$321,631,103
2022	\$200,779,000	26.9%		0.2%			\$200,374,000	
2023	\$210,134,000	4.7%	\$410,913,000	(0.2%)	(\$6,000)	(0.0%)	\$210,545,000	\$410,919,000
2024	\$211,946,000	0.9%		0.0%			\$211,905,000	
2025	\$214,008,000	1.0%	\$425,954,000	(0.1%)	(\$204,000)	(0.0%)	\$214,253,000	\$426,158,000
2026	\$215,872,000	0.9%		(0.1%)			\$216,162,000	
2027	\$217,739,000	0.9%	\$433,611,000	(0.1%)	(\$428,000)	(0.1%)	\$217,877,000	\$434,039,000
2028	\$219,548,000	0.8%		(0.0%)			\$219,656,000	
2029	\$221,486,000	0.9%	\$441,034,000	(0.0%)	(\$173,000)	(0.0%)	\$221,551,000	\$441,207,000

<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, including service reductions associated with the COVID-19 pandemic.

<sup>2</sup> FY 2021 includes actual revenue data through September 2020. Light green shaded values denote historical annual data.

# Washington State Ferries

## REVENUE PROJECTIONS | NOVEMBER 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 2021-2029

Fiscal Year	November 2020 Capacity-Constrained Revenue Forecast	November 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	\$166,825,103		\$3,304,324	\$378,136	\$3,682,460		\$163,142,643	
2021 <sup>2</sup>	\$158,241,000	\$325,066,103	\$2,917,000	\$2,917,000	\$5,834,000	\$9,516,460	\$152,407,000	\$315,549,643
2022	\$200,779,000		\$3,844,000	\$3,843,000	\$7,687,000		\$193,092,000	
2023	\$210,134,000	\$410,913,000	\$4,036,000	\$4,036,000	\$8,072,000	\$15,759,000	\$202,062,000	\$395,154,000
2024	\$211,946,000		\$4,070,000	\$4,070,000	\$8,140,000		\$203,806,000	
2025	\$214,008,000	\$425,954,000	\$4,112,000	\$4,112,000	\$8,224,000	\$16,364,000	\$205,784,000	\$409,590,000
2026	\$215,872,000		\$4,153,000	\$4,153,000	\$8,306,000		\$207,566,000	
2027	\$217,739,000	\$433,611,000	\$4,197,000	\$4,197,000	\$8,394,000	\$16,700,000	\$209,345,000	\$416,911,000
2028	\$219,548,000		\$4,240,000	\$4,240,000	\$8,480,000		\$211,068,000	
2029	\$221,486,000	\$441,034,000	\$4,286,000	\$4,285,000	\$8,571,000	\$17,051,000	\$212,915,000	\$423,983,000

<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, including service reductions associated with the COVID-19 pandemic.

<sup>2</sup> FY 2021 includes actual revenue data through September 2020. Light green shaded values denote historical annual data.

# Washington State Ferries

## REVENUE PROJECTIONS | NOVEMBER 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 2021-2029

Fiscal Year	November 2020 Capacity-Constrained Revenue Forecast	Fiscal Year Annual Rate of Change	November Biennium Total	November vs. September Forecast			September 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	\$166,825,103	(14.6%)		0.0%			\$166,825,103	
2021 <sup>2</sup>	\$158,241,000	(5.1%)	\$325,066,103	2.2%	\$3,435,000	1.1%	\$154,806,000	\$321,631,103
2022	\$203,551,000	28.6%		0.2%			\$203,066,000	
2023	\$216,917,000	6.6%	\$420,468,000	(0.1%)	\$228,000	0.1%	\$217,174,000	\$420,240,000
2024	\$222,959,000	2.8%		0.1%			\$222,730,000	
2025	\$229,826,000	3.1%	\$452,785,000	(0.0%)	\$202,000	0.0%	\$229,853,000	\$452,583,000
2026	\$236,555,000	2.9%		(0.0%)			\$236,560,000	
2027	\$243,493,000	2.9%	\$480,048,000	0.1%	\$248,000	0.1%	\$243,240,000	\$479,800,000
2028	\$250,484,000	2.9%		0.2%			\$250,075,000	
2029	\$257,615,000	2.8%	\$508,099,000	0.2%	\$950,000	0.2%	\$257,074,000	\$507,149,000

<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 2021 includes actual revenue data through September 2020. Light green shaded values denote historical annual data.

# Washington State Ferries

## REVENUE PROJECTIONS | NOVEMBER 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 2021-2029

Fiscal Year	November 2020 Capacity-Constrained Revenue Forecast	November 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	\$166,825,103		\$3,304,324	\$378,136	\$3,682,460		\$163,142,643	
2021 <sup>2</sup>	\$158,241,000	\$325,066,103	\$2,917,000	\$2,917,000	\$5,834,000	\$9,516,460	\$152,407,000	\$315,549,643
2022	\$203,551,000		\$3,834,000	\$3,833,000	\$7,667,000		\$195,884,000	
2023	\$216,917,000	\$420,468,000	\$4,005,000	\$4,005,000	\$8,010,000	\$15,677,000	\$208,907,000	\$404,791,000
2024	\$222,959,000		\$4,020,000	\$4,020,000	\$8,040,000		\$214,919,000	
2025	\$229,826,000	\$452,785,000	\$4,045,000	\$4,044,000	\$8,089,000	\$16,129,000	\$221,737,000	\$436,656,000
2026	\$236,555,000		\$4,066,000	\$4,065,000	\$8,131,000		\$228,424,000	
2027	\$243,493,000	\$480,048,000	\$4,091,000	\$4,090,000	\$8,181,000	\$16,312,000	\$235,312,000	\$463,736,000
2028	\$250,484,000		\$4,115,000	\$4,114,000	\$8,229,000		\$242,255,000	
2029	\$257,615,000	\$508,099,000	\$4,140,000	\$4,139,000	\$8,279,000	\$16,508,000	\$249,336,000	\$491,591,000

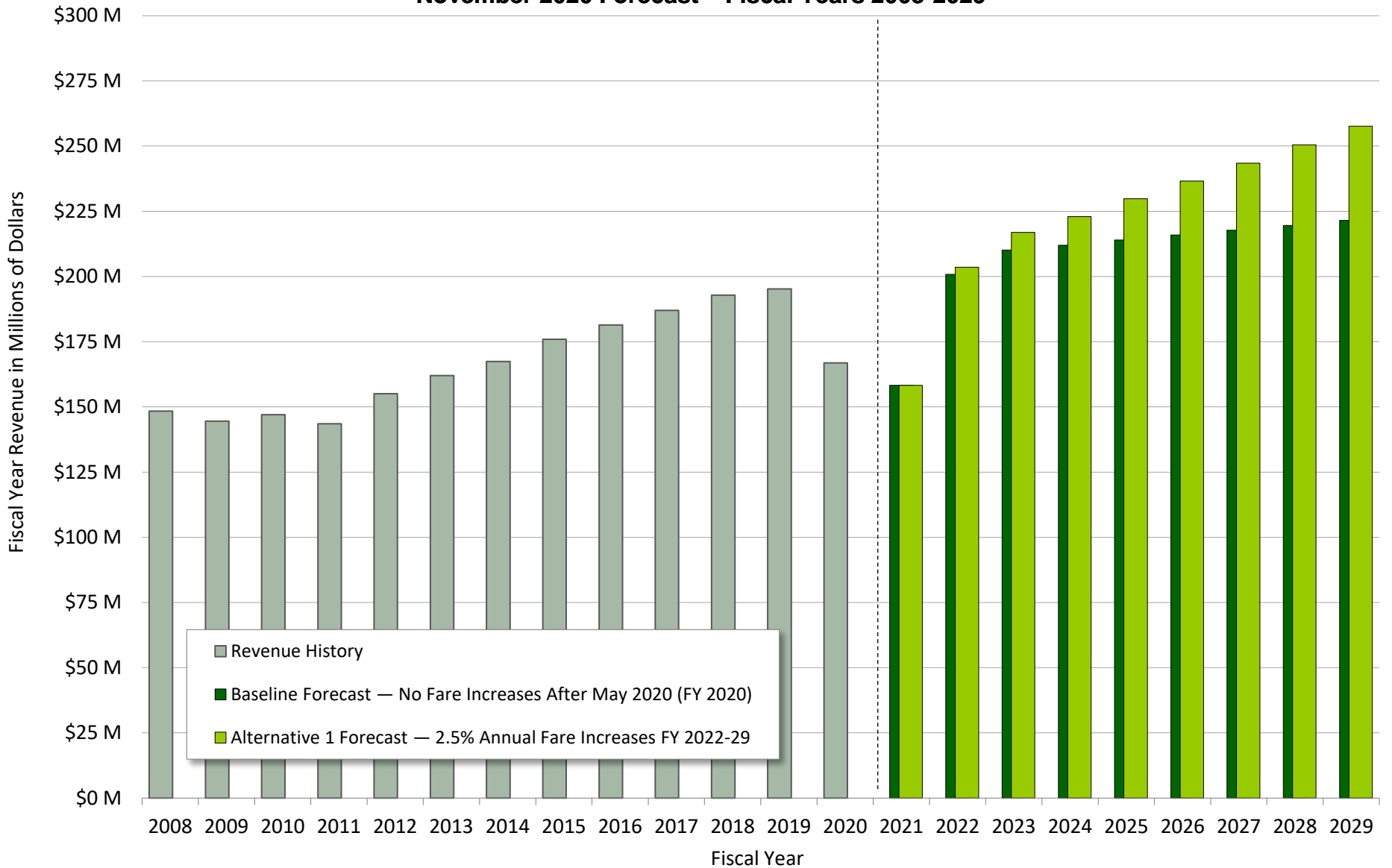
<sup>1</sup> The Baseline & Alt 1 Forecasts includes two FY 2020 fare increases of 2.0% for passengers and 2.5% for vehicles on October 1, 2019 and again on May 1, 2020. The May 1 increase also includes doubling the existing \$0.25 surcharge per fare sold and collected for capital uses to a total of \$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 2021 includes actual revenue data through September 2020. Light green shaded values denote historical annual data.



# Washington State Ferries — Revenue History and Forecast Trends

## November 2020 Forecast – Fiscal Years 2008-2029



# Washington State Ferries

## RIDERSHIP PROJECTIONS | NOVEMBER 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 2021-2029

Fiscal Year	November 2020 Unconstrained Demand Forecast*	November 2020 Capacity Constrained Projections				September 2020 Baseline	
		Passenger Ridership	Vehicle/Driver Ridership	Total Ridership	Annual Rate of Change	Total Ridership	November 2020 vs September
2010		12,463,027	10,134,311	22,597,338	0.2%		
2011		12,242,320	9,968,973	22,211,293	(1.7%)		
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		13,699,985	10,555,460	24,255,445	(1.3%)		
2020		10,358,348	9,020,899	19,379,247	(20.1%)	19,379,247	0.0%
2021 <sup>2</sup>	16,869,000	8,530,000	8,339,000	16,869,000	(13.0%)	16,718,000	0.9%
2022	22,823,000	12,681,000	10,140,000	22,821,000	35.3%	22,903,000	(0.4%)
2023	24,028,000	13,372,000	10,607,000	23,979,000	5.1%	24,176,000	(0.8%)
2024	24,239,000	13,443,000	10,719,000	24,162,000	0.8%	24,210,000	(0.2%)
2025	24,548,000	13,599,000	10,820,000	24,419,000	1.1%	24,494,000	(0.3%)
2026	24,870,000	13,781,000	10,906,000	24,687,000	1.1%	24,756,000	(0.3%)
2027	25,235,000	14,013,000	10,981,000	24,994,000	1.2%	25,046,000	(0.2%)
2028	25,595,000	14,240,000	11,054,000	25,294,000	1.2%	25,364,000	(0.3%)
2029	25,970,000	14,474,000	11,133,000	25,607,000	1.2%	25,690,000	(0.3%)

<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, including service reductions associated with the COVID-19 pandemic.

<sup>2</sup> FY 2021 includes actual ridership data through October 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 | NOVEMBER 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 2021-2029

Fiscal Year	November 2020 Unconstrained Demand Forecast*	November 2020 Capacity Constrained Projections				September 2020 Alternative 1	
		Passenger Ridership	Vehicle/Driver Ridership	Total Ridership	Annual Rate of Change	Total Ridership	November 2020 vs September
2010		12,463,027	10,134,311	22,597,338	0.2%		
2011		12,242,320	9,968,973	22,211,293	(1.7%)		
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		13,699,985	10,555,460	24,255,445	(1.3%)		
2020		10,358,000	9,021,000	19,379,000	(20.1%)	19,379,000	0.0%
2021 <sup>2</sup>	16,869,000	8,530,000	8,339,000	16,869,000	(13.0%)	16,718,000	0.9%
2022	22,759,000	12,639,000	10,118,000	22,757,000	34.9%	22,829,000	(0.3%)
2023	23,823,000	13,248,000	10,533,000	23,781,000	4.5%	23,955,000	(0.7%)
2024	23,893,000	13,239,000	10,601,000	23,840,000	0.2%	23,860,000	(0.1%)
2025	24,053,000	13,307,000	10,667,000	23,974,000	0.6%	24,010,000	(0.1%)
2026	24,211,000	13,389,000	10,713,000	24,102,000	0.5%	24,122,000	(0.1%)
2027	24,411,000	13,521,000	10,753,000	24,274,000	0.7%	24,262,000	0.0%
2028	24,608,000	13,648,000	10,790,000	24,438,000	0.7%	24,429,000	0.0%
2029	24,819,000	13,783,000	10,831,000	24,614,000	0.7%	24,605,000	0.0%

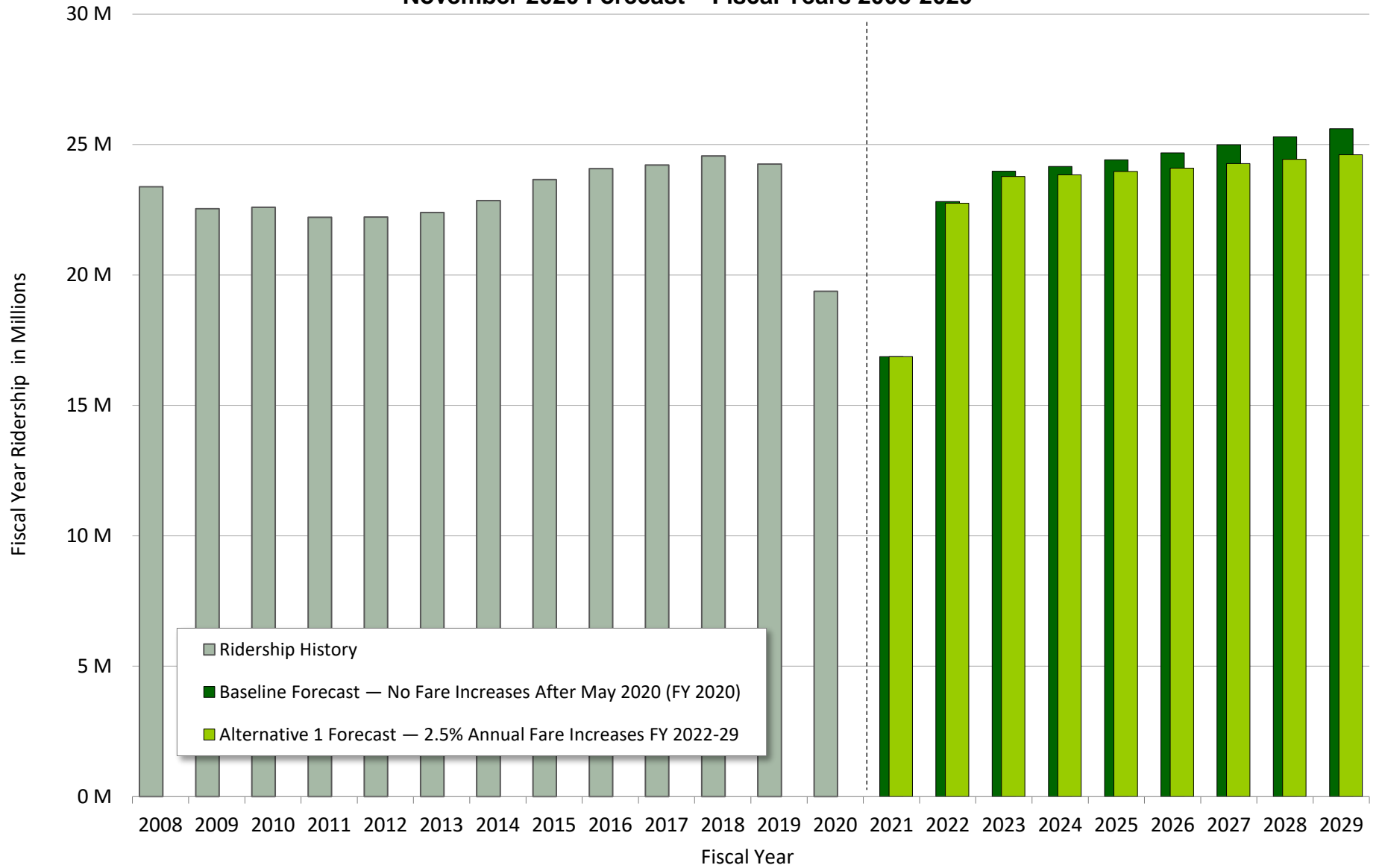
<sup>1</sup> The Alternative 1 Forecast includes two FY 2020 fare increases of 2.0% for passengers and 2.5% for vehicles on October 1, 2019 and again on May 1, 2020. The May 1, 2020 increase also include doubling the existing \$0.25 surcharge per fare sold and collected for capital uses to a total of \$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 2021 includes actual ridership data through October 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

November 2020 Forecast – Fiscal Years 2008-2029



**Transit Sales Tax  
Forecast November 2020**

**Transportation Revenue Forecast Council**

**Table ST. 1c. Combined Sound Transit Revenue (ST 2 & ST 3) Forecast - CY Biennium Comparison of November 2020 and 2019 Forecasts  
November 2020**

	2015-2017 Biennium		2015-2017 Biennium		Difference		2017-2019 Biennium		2017-2019 Biennium		Difference	
	November 2020	November 2019	Difference Value	Percent	November 2020	November 2019	Difference Value	Percent	November 2020	November 2019	Difference Value	Percent
Sales & Use Tax Revenue	1,772,532,164	1,772,532,164	-	0.0%	2,721,286,084	2,707,655,687	13,630,397	0.5%				
MVET Tax Revenue	344,464,541	344,464,541	-	0.0%	682,001,471	682,709,244	(707,773)	-0.1%				
<b>Rental Car</b> Tax Revenue	7,049,289	7,049,289	-	0.0%	7,556,439	7,610,040	(53,601)	-0.7%				
<b>Property</b> Tax Revenue	139,442,248	139,442,248	-	0.0%	295,636,523	294,428,043	1,208,480	0.4%				
Total Tax Revenue	2,124,045,994	2,124,045,994	-	0.0%	3,410,843,995	3,397,974,971	12,869,024	0.4%				

	2019-2021 Biennium		2019-2021 Biennium		Difference		2021-2023 Biennium		2021-2023 Biennium		Difference	
	November 2020	November 2019	Difference Value	Percent	November 2020	November 2019	Difference Value	Percent	November 2020	November 2019	Difference Value	Percent
Sales & Use Tax Revenue	2,663,109,495	2,919,776,274	(256,666,779)	-8.8%	2,689,487,087	3,121,852,940	(432,365,853)	-13.8%				
MVET Tax Revenue	669,591,765	718,774,712	(49,182,947)	-6.8%	681,563,877	756,614,223	(75,050,346)	-9.9%				
<b>Rental Car</b> Tax Revenue	3,577,001	7,679,413	(4,102,413)	-53.4%	3,564,872	7,679,413	(4,114,542)	-53.6%				
<b>Property</b> Tax Revenue	309,169,644	309,290,684	(121,040)	0.0%	323,998,460	326,513,547	(2,515,087)	-0.8%				
Total Tax Revenue	3,336,278,261	3,646,230,399	(309,952,138)	-8.5%	3,374,615,836	3,886,146,576	(511,530,740)	-13.2%				

	2023-2025 Biennium		2023-2025 Biennium		Difference		2025-2027 Biennium		2025-2027 Biennium		Difference	
	November 2020	November 2019	Difference Value	Percent	November 2020	November 2019	Difference Value	Percent	November 2020	November 2019	Difference Value	Percent
Sales & Use Tax Revenue	2,956,309,616	3,351,991,635	(395,682,018)	-11.8%	3,172,567,845	3,595,963,003	(423,395,158)	-11.8%				
MVET Tax Revenue	728,551,038	802,254,481	(73,703,443)	-9.2%	786,784,072	854,707,261	(67,923,189)	-7.9%				
<b>Rental Car</b> Tax Revenue	3,874,958	7,679,413	(3,804,456)	-49.5%	4,007,341	7,679,413	(3,672,072)	-47.8%				
<b>Property</b> Tax Revenue	340,737,342	343,020,399	(2,283,056)	-0.7%	357,869,632	359,966,172	(2,096,541)	-0.6%				
Total Tax Revenue	3,688,735,612	4,161,925,529	(473,189,917)	-11.4%	3,963,359,258	4,458,349,677	(494,990,419)	-11.1%				

	2027-2029 Biennium		2027-2029 Biennium		Difference	
	November 2020	November 2019	Difference Value	Percent	November 2020	November 2019
Sales & Use Tax Revenue	3,414,945,206	3,861,072,701	(446,127,495)	-11.6%		
MVET Tax Revenue	558,471,504	704,212,297	(145,740,792)	-20.7%		
<b>Rental Car</b> Tax Revenue	4,087,889	7,679,413	(3,591,525)	-46.8%		
<b>Property</b> Tax Revenue	375,319,432	377,754,518	(2,435,087)	-0.6%		
Total Tax Revenue	3,977,504,599	4,572,964,411	(595,459,812)	-13.0%		

**FORECAST COUNCIL  
NOVEMBER 2020  
TABLE T.1 : TRANSIT SYSTEMS**

<b>County</b>	<b>Transit System</b>	<b>Actuals 2011</b>	<b>Actuals 2012</b>	<b>Actuals 2013</b>	<b>Actuals 2014</b>	<b>Actuals 2015</b>	<b>Actuals 2016</b>	<b>Actuals 2017</b>	<b>Actuals 2018</b>	<b>Actuals 2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>
Asotin	Asotin County Transit	566,467	558,844	605,118	623,457	640,295	679,756	707,524	742,822	817,261	851,786	814,872	841,059
Benton/Franklin	Ben Franklin Transit	26,440,116	25,112,677	26,610,668	27,398,217	30,528,631	32,295,441	34,238,691	36,240,117	38,276,323	38,832,408	37,149,522	38,343,398
Chelan/Douglas	Link Transit	7,487,655	7,684,232	8,803,274	9,601,341	10,482,790	11,989,174	11,695,523	12,972,944	13,878,864	15,224,380	14,564,599	15,032,662
Clallam	Clallam Transit System	5,915,786	5,621,240	5,910,695	6,155,998	6,710,819	7,193,321	7,526,301	8,234,228	8,698,173	8,651,576	8,276,642	8,542,629
Clark	C-TRAN	22,574,256	29,007,352	32,286,940	38,577,607	43,342,293	46,978,663	50,485,221	55,612,661	59,349,233	60,459,945	57,839,783	59,698,582
Columbia	Columbia County Public	238,190	304,914	334,747	1,959,226	352,523	297,081	293,516	465,005	770,146	513,822	491,554	507,351
Cowlitz	Community Urban Bus S	2,839,374	2,843,283	2,983,382	3,203,320	3,338,804	3,672,373	3,737,541	4,046,576	4,189,687	4,307,418	4,120,746	4,253,175
Garfield	Garfield Transit	0	0	0	0	0	0	49,405	154,326	170,820	171,998	164,544	169,832
Grant	Grant Transit Authority	3,092,668	3,625,596	3,960,221	3,855,732	4,005,841	3,899,318	4,060,932	4,263,435	4,785,329	5,008,807	4,791,740	4,945,732
Grays Harbor	Grays Harbor Transporta	5,709,975	5,161,845	5,175,323	6,177,789	6,821,193	7,028,724	7,591,882	8,173,420	8,951,958	8,587,104	8,214,963	8,478,968
Island	Island Transit	6,698,183	6,564,607	7,003,607	7,450,430	8,135,371	9,390,651	10,476,276	11,485,493	11,953,506	11,878,431	11,363,654	11,728,848
Jefferson	Jefferson Transit Authori	2,572,525	3,226,040	3,639,308	3,620,677	3,949,275	4,508,413	4,646,263	5,161,234	5,457,793	5,156,185	4,932,731	5,091,254
King	Metro Transit	391,175,223	402,074,303	431,805,474	467,109,000	511,399,290	559,803,982	578,872,941	643,066,228	681,643,372	627,735,827	600,531,550	619,830,851
Kitsap	Kitsap Transit	25,789,561	26,178,800	27,276,244	29,130,778	31,373,676	34,231,454	36,223,134	52,840,712	59,138,103	58,512,931	55,977,148	57,776,087
Lewis	Twin Transit	1,253,489	1,293,142	1,388,994	1,508,478	1,536,795	1,644,880	1,768,083	1,967,664	2,154,896	1,935,538	1,851,657	1,911,164
Mason	Mason Transportation Au	3,200,012	3,186,115	3,184,327	3,456,982	3,785,158	4,002,805	4,213,310	4,702,379	5,402,126	5,551,113	5,310,544	5,481,209
Okanogan	Okanogan County PTBA	0	0	0	1,550,351	2,424,331	2,453,623	2,544,438	2,124,502	2,817,282	2,756,866	2,637,391	2,722,149
Pacific	Pacific Transit System	662,498	667,138	753,351	791,169	803,935	807,898	886,133	976,243	1,082,884	1,019,145	974,978	1,006,311
Pierce	Pierce Transit	63,758,339	64,964,695	62,075,731	65,376,033	70,148,721	74,873,690	80,111,122	85,868,503	89,996,379	86,735,502	82,976,633	85,643,256
Skagit	Skagit Transit	8,356,820	8,785,188	9,419,323	9,495,112	10,156,731	10,879,960	11,685,021	12,898,829	13,094,838	12,405,542	11,867,921	12,249,321
Snohomish	Everett Transit System	15,424,318	15,450,581	16,272,481	17,101,592	18,291,041	18,971,096	19,164,097	20,211,974	21,958,861	19,273,508	18,438,249	19,030,800
Snohomish	Community Transit	63,758,339	66,492,128	73,729,713	78,951,863	83,358,802	108,962,998	129,246,225	140,501,521	151,131,313	149,639,139	143,154,206	147,754,757
Spokane	Spokane Transit Authorit	41,563,781	42,398,806	44,832,062	47,855,528	50,080,209	53,397,334	63,320,276	72,079,561	84,046,080	86,837,489	83,074,200	85,743,958
Thurston	Intercity Transit	26,589,302	28,175,394	29,250,739	30,455,372	33,189,152	36,295,754	38,369,309	40,966,075	57,587,772	68,511,948	65,542,836	67,649,188
Walla Walla	Valley Transit	3,834,440	4,059,509	4,139,343	4,438,610	4,741,072	4,948,540	5,052,270	5,871,316	5,922,127	6,004,006	5,743,810	5,928,399
Whatcom	Whatcom Transportation	18,615,185	19,759,796	21,070,077	21,671,652	22,602,556	23,509,828	25,644,098	27,801,778	29,211,427	27,765,904	26,562,609	27,416,252
Whitman	Pullman Transit	1,088,000	1,250,000	1,180,846	1,933,084	1,235,108	1,161,527	1,165,500	1,227,124	1,204,191	1,255,971	1,201,541	1,240,155
Yakima	Selah	303,881	298,215	325,537	445,071	389,597	396,737	432,658	446,562	497,943	565,880	541,356	558,754
Yakima	Union Gap	773,995	857,982	914,743	930,000	1,016,908	1,114,665	1,152,281	1,268,149	1,177,765	1,047,091	1,001,713	1,033,905
Yakima	Yakima Transit	4,443,641	4,762,882	5,081,200	5,407,861	5,564,645	5,741,976	5,855,717	6,172,815	6,415,994	6,397,914	6,120,646	6,317,346
<b>Total</b>		<b>754,726,019</b>	<b>780,365,304</b>	<b>830,013,468</b>	<b>896,232,330</b>	<b>970,405,563</b>	<b>1,071,131,660</b>	<b>1,141,215,688</b>	<b>1,268,544,195</b>	<b>1,371,782,446</b>	<b>1,323,595,172</b>	<b>1,266,234,339</b>	<b>1,306,927,351</b>

**FORECAST COUNCIL  
NOVEMBER 2020  
TABLE T.1 : TRANSIT SYSTEMS**

<b>County</b>	<b>Transit System</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>
Asotin	Asotin County Transit	865,334	885,456	910,772	936,247	961,894	988,555	1,015,876
Benton/Franklin	Ben Franklin Transit	39,450,080	40,367,429	41,521,561	42,682,950	43,852,182	45,067,658	46,313,179
Chelan/Douglas	Link Transit	15,466,541	15,826,191	16,278,672	16,733,999	17,192,401	17,668,932	18,157,243
Clallam	Clallam Transit System	8,789,189	8,993,568	9,250,700	9,509,449	9,769,945	10,040,744	10,318,238
Clark	C-TRAN	61,421,627	62,849,890	64,646,810	66,455,029	68,275,460	70,167,889	72,107,098
Columbia	Columbia County Public	521,995	534,133	549,404	564,771	580,242	596,325	612,806
Cowlitz	Community Urban Bus S	4,375,932	4,477,687	4,605,707	4,734,532	4,864,227	4,999,052	5,137,209
Garfield	Garfield Transit	174,733	178,796	183,908	189,052	194,231	199,615	205,132
Grant	Grant Transit Authority	5,088,478	5,206,802	5,355,668	5,505,470	5,656,284	5,813,062	5,973,716
Grays Harbor	Grays Harbor Transporta	8,723,691	8,926,547	9,181,762	9,438,583	9,697,138	9,965,919	10,241,344
Island	Island Transit	12,067,370	12,347,978	12,701,015	13,056,272	13,413,928	13,785,729	14,166,721
Jefferson	Jefferson Transit Authori	5,238,200	5,360,006	5,513,252	5,667,462	5,822,713	5,984,104	6,149,485
King	Metro Transit	637,720,659	652,549,844	671,206,678	689,980,826	708,881,767	728,530,236	748,664,412
Kitsap	Kitsap Transit	59,443,644	60,825,912	62,564,965	64,314,954	66,076,761	67,908,247	69,785,007
Lewis	Twin Transit	1,966,325	2,012,048	2,069,574	2,127,462	2,185,740	2,246,324	2,308,405
Mason	Mason Transportation Au	5,639,410	5,770,545	5,935,529	6,101,550	6,268,693	6,442,445	6,620,493
Okanogan	Okanogan County PTBA	2,800,717	2,865,843	2,947,779	3,030,231	3,113,239	3,199,531	3,287,955
Pacific	Pacific Transit System	1,035,356	1,059,431	1,089,721	1,120,202	1,150,888	1,182,788	1,215,476
Pierce	Pierce Transit	88,115,126	90,164,104	92,741,956	95,336,017	97,947,598	100,662,465	103,444,444
Skagit	Skagit Transit	12,602,866	12,895,926	13,264,629	13,635,650	14,009,178	14,397,478	14,795,376
Snohomish	Everett Transit System	19,580,074	20,035,378	20,608,203	21,184,629	21,764,949	22,368,220	22,986,404
Snohomish	Community Transit	152,019,315	155,554,283	160,001,684	164,477,049	168,982,640	173,666,425	178,465,993
Spokane	Spokane Transit Authorit	88,218,735	90,270,122	92,851,005	95,448,117	98,062,768	100,780,828	103,566,078
Thurston	Intercity Transit	69,601,706	71,220,183	73,256,416	75,305,452	77,368,327	79,512,787	81,710,259
Walla Walla	Valley Transit	6,099,507	6,241,341	6,419,785	6,599,351	6,780,130	6,968,059	7,160,633
Whatcom	Whatcom Transportation	28,207,551	28,863,473	29,688,699	30,519,114	31,355,137	32,224,225	33,114,796
Whitman	Pullman Transit	1,275,948	1,305,619	1,342,947	1,380,510	1,418,327	1,457,640	1,497,924
Yakima	Selah	574,881	588,249	605,067	621,991	639,030	656,742	674,892
Yakima	Union Gap	1,063,746	1,088,482	1,119,602	1,150,918	1,182,446	1,215,220	1,248,805
Yakima	Yakima Transit	6,499,679	6,650,819	6,840,971	7,032,318	7,224,957	7,425,215	7,630,423
<b>Total</b>		<b>1,344,648,415</b>	<b>1,375,916,087</b>	<b>1,415,254,442</b>	<b>1,454,840,158</b>	<b>1,494,693,220</b>	<b>1,536,122,459</b>	<b>1,578,575,824</b>



**TRANSPORTATION REVENUE FORECAST COUNCIL  
NOVEMBER 2020**

**TABLE T.2: TRANSIT BENEFIT DISTRICT LOCALLY  
GENERATED SALES AND USE TAX DISTRIBUTIONS**

Transportation Benefit District	County	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals
		2012	2013	2014	2015	2016	2017	2018	2019
Aberdeen TBD	Grays Harbor	0	180,975	533,746	543,813	530,040	562,527	590,344	711,512
Airway Heights TBD	Spokane	0	0	218,110	367,993	393,090	460,735	499,706	553,685
Anacortis	Snohomish	0	0	0	0	0	0	0	705,319
Arlington TBD	Snohomish	0	0	599,293	872,395	953,596	1,033,533	1,142,782	1,383,513
Bellingham TBD	Whatcom	1,143,332	4,655,993	4,700,864	4,903,512	5,169,348	5,473,547	5,898,842	6,121,740
Blaine TBD	Whatcom	0	0	0	0	0	0	355,527	465,603
Castle Rock TBD	Cowlitz	0	52,623	87,724	84,944	87,652	92,112	102,724	114,357
Centralia TBD	Lewis	0	0	0	0	410,960	688,293	806,462	997,649
Chehalis TBD	Lewis	0	0	0	0	0	0	1,154,400	1,153,653
Clarkston TBD	Asotin	0	0	0	0	301,225	523,649	546,887	589,401
Connell TBD	Franklin	0	0	0	0	0	0	43,397	68,165
Dayton TBD	Columbia	0	0	0	22,167	66,992	73,873	76,636	76,924
Duvall TBD	King	0	0	0	0	0	0	0	0
Ellensburg TBD	Kititas	0	0	0	0	81,260	1,147,279	1,123,849	1,199,186
Enumclaw TBD	King	0	0	0	0	170,479	333,143	372,972	394,298
Ephrata	Grant								
Ferndale TBD	Whatcom	87,103	355,553	392,106	409,812	419,457	468,385	520,886	571,096
Friday Harbor TBD	San Juan	0	0	0	166,162	269,935	288,085	305,574	330,562
George TBD	Grant	0	0	0	0	0	0	0	0
Gig Harbor TBD	Kitsap	0	0	0	0	0	0	0	0
Grand Coulee TBD	Grant	0	0	0	0	0	0	25,628	73,563
Lacey TBD	Thurston	0	0	0	0	0	0	2,863,397	3,104,662
Leavenworth TBD	Chelan	68,547	243,526	262,492	280,152	313,250	384,530	437,373	436,872
Long Beach TBD	Pacific	0	0	0	0	0	0	96,207	171,799
Lynden TBD	Whatcom	0	262,754	452,237	546,314	502,411	631,858	629,201	642,879
Lynnwood TBD	Snohomish	0	0	0	0	0	1,493,201	2,674,197	2,757,305
Marysville TBD	Snohomish	0	0	146,380	1,984,965	2,108,967	2,250,113	2,430,772	2,813,907
Mattawa TBD	Grant	0	0	0	0	4,504	60,808	58,547	59,569
Monroe TBD	Snohomish	0	0	0	786,778	1,058,999	1,220,039	1,229,117	1,287,809
Moses Lake TBD	Grant	0	0	0	0	0	0	945,027	1,676,783
Mount Vernon TBD	Skagit	0	0	0	0	0	1,000,128	1,768,530	1,819,932
Mukilteo TBD	Snohomish	0	0	0	0	0	0	189,566	336,017
North Bend TBD	King	112,316	446,069	452,606	476,286	489,126	521,530	594,005	674,840
Oak Harbor	Island	0	0	0	0	0	0	0	0
Ocean Shores	Grays Harbor	0	0	0	0	24,866	356,976	369,299	372,681
Othello TBD	Adams								833,420
Port Angeles TBD	Callam	0	0	0	0	0	0	693,601	833,420
Ridgefield	Clark	0	0	0	0	0	0	0	0
Seattle TBD	King	0	0	0	13,420,396	24,429,098	25,879,458	28,660,677	30,323,833
Sequim TBD	Callam	0	0	0	0	0	0	796,505	844,194
Shelton TBD	Mason	0	0	0	0	274,878	494,805	551,166	685,810
Shoreline TBD	King	0	0	0	0	0	0	0	1,559,156
Snohomish City TBD	Snohomish	177,480	754,904	770,851	845,280	917,898	982,208	1,004,357	1,056,662
Stanwood TBD	Snohomish	0	84,052	259,856	287,375	347,631	333,641	363,467	478,192
Tacoma TBD	Pierce	0	0	0	0	2,973,062	5,608,297	5,963,463	6,109,972
Tumwater TBD	Thurston	0	0	0	83,843	1,310,539	1,513,578	1,676,202	1,884,231
Twisp TBD	Okanogan	0	0	0	0	0	45,987	61,315	67,325
Waitsburg TBD	Walla Walla	0	7,090	7,554	7,926	7,343	8,082	12,395	9,540
Walla Walla City TBD	Walla Walla	258,125	1,022,533	1,048,584	1,135,799	1,249,533	1,236,517	1,416,353	1,445,228
Total		1,846,903	8,066,073	9,932,403	27,225,910	44,866,139	55,166,919	69,051,351	77,796,262

**TRANSPORTATION REVENUE FORECAST COUNCIL  
NOVEMBER 2020**

**TABLE T.2: TRANSIT BENEFIT DISTRICT LOCALLY  
GENERATED SALES AND USE TAX DISTRIBUTIONS**

Transportation Benefit District	County	Estimate									
		2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Aberdeen TBD	Grays Harbor	862,109	824,748	851,253	875,822	896,188	921,810	947,594	973,552	1,000,536	1,028,188
Airway Heights TBD	Spokane	540,300	516,885	533,496	548,894	561,658	577,716	593,875	610,143	627,055	644,385
Anacortis	Snohomish	1,053,045	1,007,409	1,039,784	1,069,795	1,094,671	1,125,969	1,157,463	1,189,170	1,222,131	1,255,906
Arlington TBD	Snohomish	1,466,524	1,402,969	1,448,056	1,489,851	1,524,495	1,568,081	1,611,941	1,656,098	1,702,001	1,749,039
Bellingham TBD	Whatcom	5,783,867	5,533,210	5,711,031	5,875,865	6,012,499	6,184,401	6,357,383	6,531,534	6,712,572	6,898,085
Blaine TBD	Whatcom	389,458	372,580	384,553	395,652	404,853	416,428	428,076	439,802	451,992	464,484
Castle Rock TBD	Cowlitz	119,217	114,050	117,716	121,113	123,930	127,473	131,038	134,628	138,359	142,183
Centralia TBD	Lewis	762,945	729,881	753,337	775,080	793,103	815,779	838,597	861,569	885,449	909,920
Chehalis TBD	Lewis	1,169,701	1,119,010	1,154,971	1,188,307	1,215,939	1,250,703	1,285,686	1,320,906	1,357,518	1,395,035
Clarkston TBD	Asotin	622,009	595,053	614,176	631,903	646,597	665,083	683,686	702,415	721,884	741,835
Connell TBD	Franklin	76,297	72,991	75,337	77,511	79,313	81,581	83,863	86,160	88,548	90,995
Dayton TBD	Columbia	77,147	73,804	76,176	78,374	80,197	82,490	84,797	87,120	89,535	92,009
Duvall TBD	King	138,705	132,694	136,958	140,911	144,188	148,310	152,458	156,635	160,976	165,425
Ellensburg TBD	Kittitas	1,134,202	1,085,049	1,119,919	1,152,242	1,179,036	1,212,745	1,246,667	1,280,817	1,316,318	1,352,697
Enumclaw TBD	King	402,145	384,717	397,081	408,541	418,041	429,993	442,021	454,129	466,716	479,615
Ephrata	Grant										
Ferndale TBD	Whatcom	606,925	580,622	599,282	616,579	630,916	648,954	667,106	685,380	704,378	723,844
Friday Harbor TBD	San Juan	256,286	245,180	253,059	260,363	266,417	274,034	281,699	289,416	297,438	305,658
George TBD	Grant	16,319	15,612	16,113	16,578	16,964	17,449	17,937	18,428	18,939	19,462
Gig Harbor TBD	Kitsap	844,318	807,727	833,685	857,747	877,693	902,787	928,038	953,460	979,888	1,006,969
Grand Coulee TBD	Grant	76,617	73,297	75,653	77,836	79,646	81,923	84,215	86,522	88,920	91,377
Lacey TBD	Thurston	3,151,229	3,014,664	3,111,546	3,201,353	3,275,795	3,369,453	3,463,699	3,558,581	3,657,216	3,758,290
Leavenworth TBD	Chelan	369,784	353,758	365,127	375,665	384,401	395,391	406,451	417,585	429,159	441,020
Long Beach TBD	Pacific	134,090	128,279	132,401	136,223	139,391	143,376	147,386	151,424	155,621	159,921
Lynden TBD	Whatcom	636,271	608,697	628,259	646,392	661,422	680,333	699,362	718,520	738,436	758,844
Lynwood TBD	Snohomish	2,417,827	2,313,045	2,387,379	2,456,285	2,513,402	2,585,262	2,657,573	2,730,373	2,806,053	2,883,603
Marysville TBD	Snohomish	2,963,128	2,834,715	2,925,814	3,010,260	3,080,259	3,168,325	3,256,946	3,346,165	3,438,912	3,533,953
Mattawa TBD	Grant	54,626	52,258	53,938	55,494	56,785	58,408	60,042	61,687	63,397	65,149
Monroe TBD	Snohomish	1,268,399	1,213,431	1,252,427	1,288,575	1,318,539	1,356,236	1,394,171	1,432,362	1,472,064	1,512,747
Moses Lake TBD	Grant	1,705,194	1,631,296	1,683,721	1,732,317	1,772,599	1,823,279	1,874,277	1,925,620	1,978,994	2,033,687
Mount Vernon TBD	Skagit	1,810,004	1,731,563	1,787,210	1,838,794	1,881,552	1,935,347	1,989,480	2,043,978	2,100,633	2,158,687
Mukilteo TBD	Snohomish	348,013	332,931	343,631	353,549	361,770	372,113	382,521	393,000	403,893	415,055
North Bend TBD	King	590,957	565,347	583,515	600,357	614,317	631,881	649,555	667,349	685,846	704,801
Oak Harbor	Island	504,030	482,187	497,683	512,047	523,954	538,934	554,008	569,185	584,961	601,127
Ocean Shores	Grays Harbor	462,914	442,853	457,085	470,277	481,213	494,971	508,816	522,754	537,243	552,091
Othello TBD	Adams	866,516	828,963	855,604	880,299	900,769	926,522	952,438	978,528	1,005,651	1,033,443
Port Angeles TBD	Callam	866,516	828,963	855,604	880,299	900,769	926,522	952,438	978,528	1,005,651	1,033,443
Ridgefield	Clark	0	0	0	0	0	0	0	0	0	0
Seattle TBD	King	27,263,142	26,081,635	26,919,821	27,696,792	28,340,837	29,151,120	29,966,499	30,787,384	31,640,735	32,515,181
Sequim TBD	Callam	810,930	775,787	800,718	823,829	842,986	867,087	891,340	915,757	941,140	967,150
Shelton TBD	Mason	642,697	614,845	634,604	652,920	668,103	687,204	706,426	725,777	745,894	766,508
Shoreline TBD	King	2,643,484	2,528,923	2,610,195	2,685,532	2,747,979	2,826,546	2,905,607	2,985,201	3,067,944	3,152,731
Snohomish City TBD	Snohomish	1,086,155	1,039,084	1,072,477	1,103,432	1,129,090	1,161,372	1,193,856	1,226,560	1,260,557	1,295,395
Stanwood TBD	Snohomish	543,256	519,713	536,415	551,897	564,731	580,877	597,125	613,482	630,486	647,911
Tacoma TBD	Pierce	5,596,657	5,354,114	5,526,179	5,685,678	5,817,889	5,984,227	6,151,610	6,320,124	6,495,302	6,674,811
Tumwater TBD	Thurston	2,160,840	2,067,195	2,133,629	2,195,210	2,246,256	2,310,478	2,375,104	2,440,166	2,507,802	2,577,109
Twisp TBD	Okanogan	69,010	66,019	68,141	70,108	71,738	73,789	75,853	77,931	80,091	82,304
Waitsburg TBD	Walla Walla	10,457	10,004	10,325	10,623	10,878	11,181	11,494	11,809	12,136	12,471
Walla Walla City TBD	Walla Walla	1,387,061	1,326,950	1,369,594	1,409,124	1,441,891	1,483,115	1,524,599	1,566,363	1,609,779	1,654,268
Total		76,761,321	73,434,705	75,794,678	77,982,295	79,795,650	82,077,061	84,372,817	86,684,078	89,086,748	91,548,812

# **Alternative Enhanced Drivers' License Forecast**

**November 2020**

**Comparison of Alternative November 2020 Enhanced Drivers License Revenue Forecast to the Baseline September 2017 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>November 2020 Baseline Forecast (Adjusted DP)</b>												
<b>Forecast (Adjusted DP)</b>	\$ 4,361,952	\$ 5,154,322	\$ 8,079,454	\$ 9,363,000	\$ 19,654,000	\$ 18,229,000	\$ 16,548,000	\$ 17,097,000	\$ 18,404,000	\$ 19,860,000	\$ 19,061,000	\$ 18,857,000
<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	\$ 12,919,546	\$ 14,785,000	\$ 2,474,000	\$ 2,311,000	\$ 3,925,000	\$ 4,832,000	\$ 3,574,000	\$ 2,808,000	\$ 3,635,000	\$ 3,880,000
<b>% Difference</b>	287%	448%	160%	158%	13%	13%	24%	28%	19%	14%	19%	21%
<b>Alternative B: Pre-DP Estimate</b>	\$ 4,361,952	\$ 5,154,322	\$ 8,079,454	\$ 7,811,000	\$ 14,781,000	\$ 13,976,000	\$ 12,687,000	\$ 13,108,000	\$ 14,110,000	\$ 15,226,000	\$ 14,613,000	\$ 14,457,000
<b>Difference from baseline</b>	\$ -	\$ -	\$ -	\$ (1,552,000)	\$ (4,873,000)	\$ (4,253,000)	\$ (3,861,000)	\$ (3,989,000)	\$ (4,294,000)	\$ (4,634,000)	\$ (4,448,000)	\$ (4,400,000)
<b>% Difference</b>	0%	0%	0%	-17%	-25%	-23%	-23%	-23%	-23%	-23%	-23%	-23%

Nov 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 valise 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.

Alternative B: Pre-DP Estimates is based primarily on actual observations to date with known policy changes incorporated in a relatively conservative manner, outside the funding request (DP) process.