

**Transportation Economic Revenue Forecast  
Council**

**March 2025 Transportation Economic and  
Revenue Forecast**

**Volume I: Summary**

# Washington Transportation

## Economic and Revenue Forecast

March 2025

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### Volume I

Forecast Overview	4
Economic Variables Forecast	8
Motor Fuel Price Forecast	8
Motor Vehicle Fuel Tax Forecast	10
Motor Vehicle Revenue (Licenses, Permits and Fees)	13
Driver Related Revenues Forecasts	14
Other Transportation Related Revenue Forecasts	15
Ferry Ridership and Revenue	18
Toll Revenue	22
Federal Funds Revenue	29
Public Transportation Federal Funds Revenue	33
Washington State Ferries Federal Funds Revenue	34
Appendix	35
2022 Transportation Packet (ESSB 5974) New/Incremental Revenues by Fee	36
Forecast Contact List Other Transportation Related Revenue Forecasts	37

## **Preface**

Washington law mandates the preparation, and adoption of economic and revenue forecasts. The organizations primarily responsible for revenue forecasts are the Economic and Revenue Forecast Council and the Office of Financial Management. The Office of Financial Management has the statutory responsibility to prepare and adopt those forecasts not made by the Economic and Revenue Forecast Council (RCW 43.88.020). The Office of Financial Management has carried out its forecast responsibilities for transportation revenues through the Transportation Revenue Forecast Council. Each quarter, technical staff of the Department of Licensing, Department of Transportation, Washington State Patrol, and the Office of Forecast Council produce forecasts.

The revenue forecasts agreed upon by the Transportation Revenue Forecast Council members became the official estimated revenues under RCW 43.88.020 21.

The 2023 Legislature amended RCW 82.33.020 through the passage of ESHB 1838. As a result, WSDOT transferred the state's motor fuels, fuels price, vehicle registration and other revenue forecast activities to Washington's Economic Revenue Forecast Council (ERFC). The transition of forecasting activities from WSDOT to ERFC was completed in 2024 and the September 2024 forecast was the first forecast ERFC produced.

## March 2025 Transportation Forecast Overview

### Forecast Overview

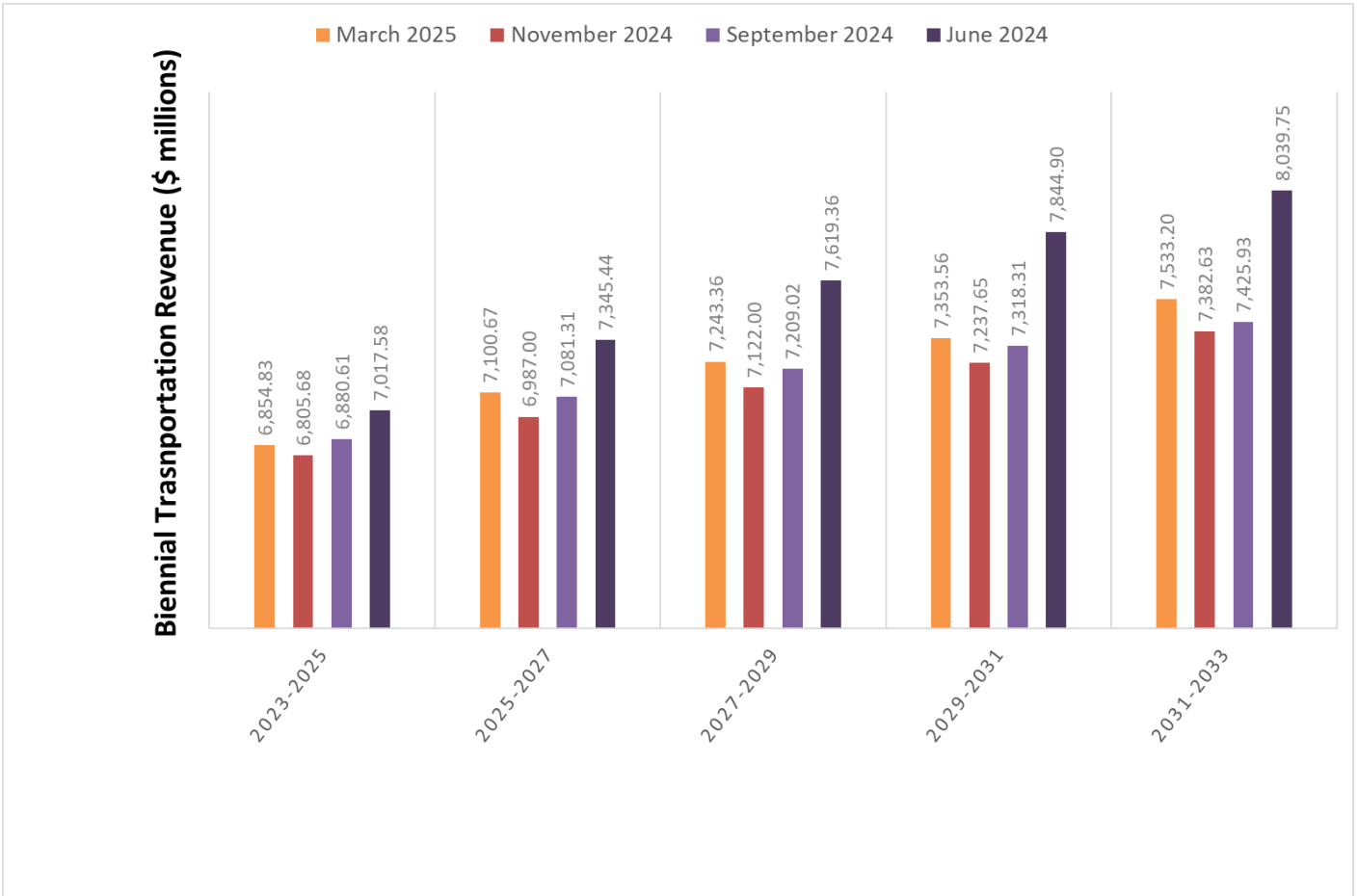
- 2023–2025 Biennium:** The total transportation revenue estimate for the 2023–25 biennium stands at \$6.85 billion, reflecting a \$49.2 million increase compared to the November 2024 forecast. This adjustment is primarily attributed to a \$49.6 million increase in the Motor Vehicle Fuel Tax forecast, partially offset by a \$5.4 million decline in Business and Other Revenues (see Figure 1).
- 2025–2027 Biennium:** Revenues for the 2025–27 biennium are projected at \$7.10 billion, representing an increase of \$113.7 million, or 1.63%, over the November 2024 forecast (see Figure 1).
- 2027–2029 Biennium:** Revenues for the 2027–29 biennium are anticipated to reach \$7.24 billion, reflecting an increase of \$121.4 million, or 1.7%, compared to the November 2024 forecast (see Figure 1).
- Three-Biennia Forecast Horizon:** Over the three-biennia forecast horizon, total baseline revenues for March 2025 have increased by \$284.2 million, or 1.34%, relative to the November 2024 forecast. This growth is predominantly driven by higher projections for the Motor Vehicle Fuel Tax and Ferry Revenue (see Figure 1).

**Figure 1: Current March 2025 vs. November 2024 Forecast: All Revenues**

Forecast to Forecast Comparison for Transportation Revenues and Distributions 10-Year Period												
March 2025 Forecast to November 2024 Forecast millions of dollars												
	Current Biennium 2023-2025				Biennium 2025-2027				Biennium 2027-2029			
	Forecast March 2025	Forecast November 2024	Chg from November 2024	Percent Change	Forecast March 2025	Forecast November 2024	Chg from November 2024	Percent Change	Forecast March 2025	Forecast November 2024	Chg from November 2024	Percent Change
	<b>Sources of Transportation Revenue</b>											
Motor Vehicle Fuel Tax Collections	3,229.7	3,179.9	49.81	1.57%	3,185.7	3,074.5	111.18	3.62%	3,154.8	3,035.3	119.50	3.94%
Licenses, Permits and Fees	1,992.7	1,994.1	(1.42)	-0.07%	2,134.0	2,137.6	(3.63)	-0.17%	2,256.4	2,259.0	(2.59)	-0.11%
Ferry Revenue†	379.3	374.5	4.84	1.29%	424.2	418.4	5.88	1.41%	444.3	436.9	7.39	1.69%
Toll Revenue	531.3	531.3	0.00	0.00%	564.1	564.1	0.00	0.00%	596.1	596.1	0.00	0.00%
Aviation Revenues	15.0	14.9	0.11	0.77%	14.4	14.4	0.00	0.00%	14.1	14.1	0.00	0.00%
Rental Car Tax	91.6	94.0	(2.37)	-2.52%	94.5	97.3	(2.77)	-2.84%	98.6	101.9	(3.30)	-3.24%
Vehicle Sales Tax	128.2	127.1	1.06	0.84%	133.3	131.0	2.31	1.76%	141.3	138.9	2.42	1.74%
Driver-Related Fees	353.9	351.4	2.49	0.71%	394.9	393.9	0.93	0.24%	378.4	380.3	(1.89)	-0.50%
Business/Other Revenues	133.2	138.5	(5.37)	-3.88%	155.5	155.8	(0.23)	-0.15%	159.4	159.6	(0.18)	-0.11%
<b>Total Revenues</b>	<b>6,854.8</b>	<b>6,805.7</b>	<b>49.16</b>	<b>0.72%</b>	<b>7,100.7</b>	<b>6,987.0</b>	<b>113.67</b>	<b>1.63%</b>	<b>7,243.4</b>	<b>7,122.0</b>	<b>121.36</b>	<b>1.70%</b>
<b>Distribution of Revenue</b>												
Motor Fuel Tax Refunds and Transfers	205.0	213.0	(8.02)	-3.77%	206.3	230.6	(24.28)	-10.53%	206.2	229.5	(23.26)	-10.13%
Motor Fuel Administrative Fee - DOL	19.2	18.7	0.51	2.75%	19.1	18.0	1.13	6.29%	18.9	17.7	1.20	6.78%
<b>State Uses</b>												
Motor Vehicle Account (108)	1,289.2	1,267.2	21.99	1.74%	1,416.7	1,366.4	50.30	3.68%	1,487.2	1,438.5	48.66	3.38%
Transportation 2003 (Nickel) Account (550)	394.7	390.8	3.95	1.01%	391.5	382.2	9.28	2.43%	390.4	379.4	11.01	2.90%
Transportation 2005 Partnership Account (09H)	585.6	579.7	5.90	1.02%	574.1	558.9	15.23	2.72%	570.6	553.6	16.97	3.07%
Connecting/Washington Account (20H)	726.4	713.3	13.12	1.84%	712.5	681.2	31.32	4.60%	706.0	672.0	33.98	5.06%
Multimodal Account (218)	687.5	689.5	(1.99)	-0.29%	719.1	721.1	(2.01)	-0.28%	745.1	747.6	(2.51)	-0.34%
Special Category C Account (215)	45.8	45.0	0.83	1.84%	44.9	42.9	1.97	4.60%	44.5	42.4	2.14	5.06%
Puget Sound Capital Construction Account (099)	33.3	32.7	0.60	1.84%	32.7	31.2	1.44	4.60%	32.4	30.8	1.56	5.06%
Puget Sound Ferry Operations Account (109)	436.2	431.0	5.18	1.20%	481.0	474.0	6.96	1.47%	500.5	491.9	8.59	1.75%
Capital Vessel Replacement Account (18J)	55.3	55.7	(0.45)	-0.81%	58.1	58.7	(0.66)	-1.13%	59.6	60.0	(0.43)	-0.72%
Tacoma Narrows Bridge Account (511)	163.9	163.9	0.00	0.00%	162.2	162.2	0.00	0.00%	165.3	165.3	0.00	0.00%
High Occupancy Toll Lanes Account (09F)*	13.1	13.1	0.00	0.00%	24.8	24.8	0.00	0.00%	30.2	30.2	0.00	0.00%
SR 520 Corridor Account (16J)	172.6	172.6	0.00	0.00%	193.3	193.3	0.00	0.00%	202.3	202.3	0.00	0.00%
SR 520 Corridor Civil Penalties Account (17P)	7.2	7.2	0.00	0.00%	7.8	7.8	0.00	0.00%	7.8	7.8	0.00	0.00%
Interstate 405 Express Toll Lanes Operations (59S)	76.7	76.7	0.00	0.00%	94.0	94.0	0.00	0.00%	106.1	106.1	0.00	0.00%
Alaskan Way Viaduct Replacement Acct. (535)	97.7	97.7	0.00	0.00%	82.0	82.0	0.00	0.00%	84.4	84.4	0.00	0.00%
Aeronautics Account (039)	14.9	14.8	0.11	0.77%	14.3	14.3	0.00	0.00%	14.0	14.0	0.00	0.00%
Washington State Aviation Account (21G)	0.1	0.1	0.00	0.00%	0.1	0.1	0.00	0.00%	0.1	0.1	0.00	0.00%
State Patrol Highway Account (081)	464.4	468.8	(4.37)	-0.93%	479.1	487.2	(8.14)	-1.67%	490.4	498.6	(8.18)	-1.64%
Highway/Motorcycle Safety Accts. (106 & 082)	296.3	298.6	(2.31)	-0.77%	357.9	356.9	0.93	0.26%	344.7	345.7	(0.98)	-0.28%
School Zone Safety Account (780)	0.5	0.4	0.04	10.07%	0.4	0.4	0.00	0.15%	0.4	0.4	0.00	0.25%
Other accounts (201, 06T, 09T, 09E, 216, 07C, 24-K)	43.5	43.8	(0.34)	-0.77%	44.2	44.4	(0.28)	-0.62%	44.8	44.8	0.04	0.10%
Electric Vehicle Account (20J)	57.8	57.4	0.40	0.70%	0.0	0.0	0.00	0.00%	0.0	0.0	0.00	0.00%
Ignition Interlock Devices Revolving Acct 14V	7.8	7.7	0.06	0.73%	7.9	7.9	0.00	0.00%	8.1	8.1	0.00	0.00%
Multisue Roadway Safety Account Collections-571	0.6	0.6	0.00	0.12%	0.6	0.6	0.00	0.61%	0.7	0.7	0.01	1.11%
Move Ahead WA Accounts - 26P	210.3	210.3	(0.03)	-0.02%	227.5	227.5	0.02	0.01%	232.0	231.6	0.38	0.17%
Move Ahead WA Accounts - 26Q	30.3	29.0	1.26	4.34%	35.4	35.4	0.02	0.06%	33.3	34.1	(0.81)	-2.39%
<b>Total for State Use</b>	<b>5,911.8</b>	<b>5,867.8</b>	<b>43.95</b>	<b>0.75%</b>	<b>6,162.06</b>	<b>6,055.7</b>	<b>106.38</b>	<b>1.76%</b>	<b>6,300.55</b>	<b>6,190.1</b>	<b>110.44</b>	<b>1.78%</b>
<b>Cities</b>												
Cities	175.6	172.4	3.17	1.84%	172.2	164.6	7.57	4.60%	170.6	162.4	8.21	5.06%
<b>Counties</b>												
Counties	284.3	279.3	5.02	1.80%	279.8	267.8	11.99	4.48%	277.8	264.8	13.01	4.91%
Transportation Improvement Board (112 & 144)	191.7	188.4	3.39	1.80%	191.7	183.6	8.13	4.43%	195.1	186.3	8.79	4.72%
County Road Administration Board (102 & 253)	67.2	66.1	1.14	1.72%	69.5	66.8	2.76	4.13%	74.1	71.1	2.97	4.17%
<b>Total for Local Use</b>	<b>718.8</b>	<b>706.1</b>	<b>12.72</b>	<b>1.80%</b>	<b>713.2</b>	<b>682.8</b>	<b>30.44</b>	<b>4.46%</b>	<b>717.7</b>	<b>684.7</b>	<b>32.98</b>	<b>4.82%</b>
<b>Total Distribution of Revenue</b>	<b>6,854.8</b>	<b>6,805.7</b>	<b>49.16</b>	<b>0.72%</b>	<b>7,100.7</b>	<b>6,987.0</b>	<b>113.67</b>	<b>1.63%</b>	<b>7,243.4</b>	<b>7,122.0</b>	<b>121.36</b>	<b>1.70%</b>

Figure 2 presents a comparison of transportation revenues across the four most recent forecast cycles: March 2025, November 2024, September 2024, and June 2024. The March 2025 forecast estimates the 10-year total transportation revenue to be \$1.624 billion (4.31%) lower than the projections in the February 2024 forecast.

Figure 2: Total Transportation Revenues Estimates: March 2025 – February 2024



Washington's transportation revenue is derived from various taxes, fees, permits, tolls, and other sources. The quarterly revenue forecasts include the components outlined in Figure 3. This graph illustrates the projected distribution of revenue sources for the 2023–25 biennium, totaling \$6.854 billion. Gasoline fuel taxes represent the largest share, accounting for 37.2% of the total. Collectively, fuel taxes contribute approximately 47.1% of all revenues. Revenues from licenses, permits, and fees comprise the second-largest share, at 29.1%. The three primary revenue sources are expected to account for 76.2% of total revenues for the 2023–25 biennium. The remaining 23.8% is projected to come from ferry fares, toll revenues, driver-related revenues, and other transportation-related sources

**Figure 3: Revenue By Source 2023-25 Biennium (\$6.8 billion)**

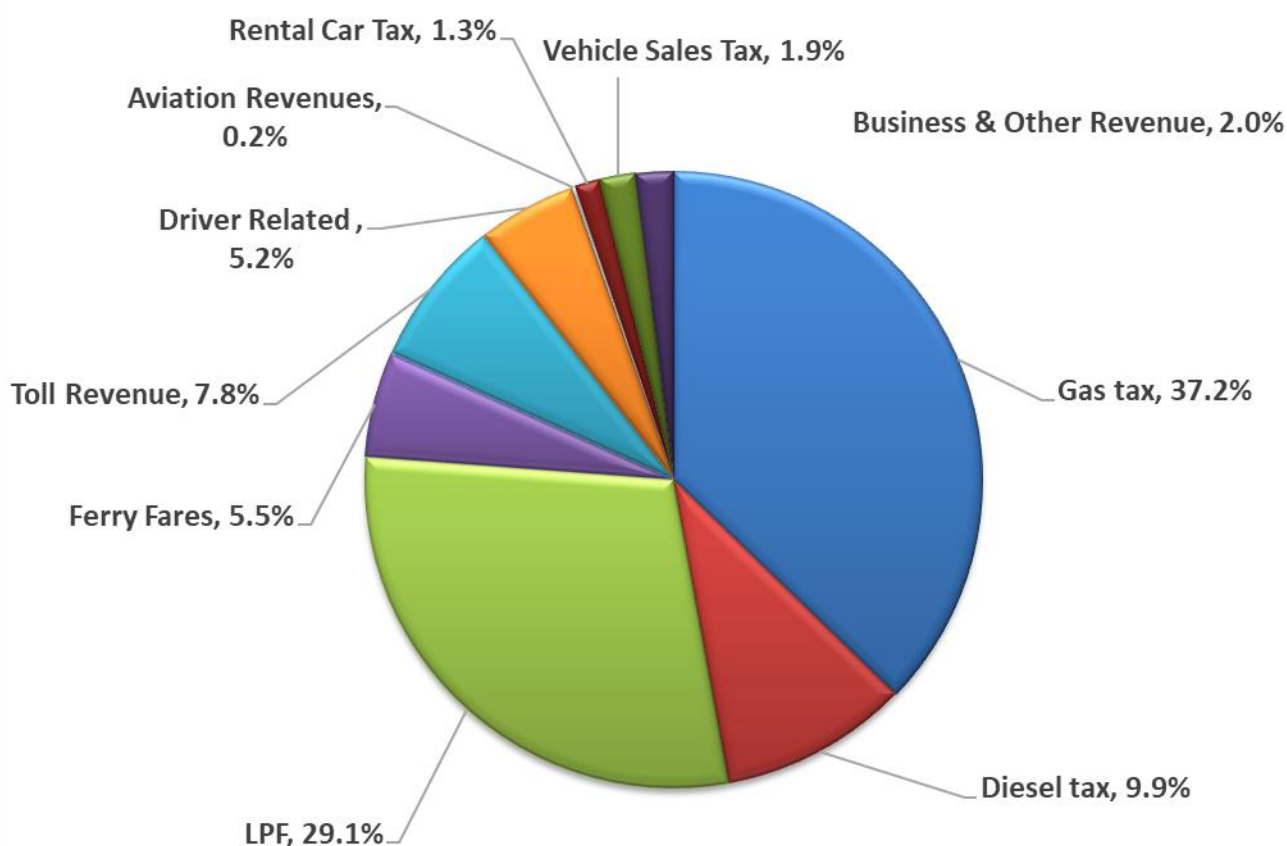


Figure 4 shows the March 2025 Forecast LESS the Move Ahead Washington Revenue Package compared to the June 2022 forecast.

**Figure 4: Current Forecast Revenue comparison to the March 2025 forecast less the impact of the Move Ahead Washington Revenue Package (Chapter 182, Laws of 2022)**

**ESSB 5974 Transportation Resources Bill (2022) Revenue Impact Summary**

Move Ahead WA (26P) by Fee	2023-2025			2025-2027			10-Year-Period (23-33)		
	March 2025	June 2022	Change	March 2025	June 2022	Change	March 2025	June 2022	Change
Plate original from \$10 to \$50 *Includes Motorcycle Plates	95.06	117.56	-19.1%	3.38	115.40	-97.1%	491.70	573.43	-14.3%
Plate replacement from \$10 to \$30 *Includes Motorcycle Plates	56.60	66.32	-14.7%	57.37	65.98	-13.1%	283.98	328.09	-13.4%
Dealer Temp from \$15 to \$40	30.73	41.13	-25.3%	38.36	39.99	-4.1%	184.48	197.99	-6.8%
Stolen vehicle fee for trucks from \$0.00 to \$0.50*	1.54	1.88	-18.2%	1.82	1.94	-5.9%	9.08	9.83	-7.6%
License Plate Tech fee for trucks from \$0.00 to \$0.25*	0.77	0.94	-18.2%	0.91	0.97	-5.9%	4.54	4.91	-7.6%
Stolen Vehicle Fee from \$15 to \$35**	25.59	32.59	-21.5%	28.93	46.00	-37.1%	149.16	259.57	-42.5%
<b>Move Ahead WA (26P)</b>	<b>210.28</b>	<b>260.42</b>	<b>-19.3%</b>	<b>227.59</b>	<b>270.28</b>	<b>-15.8%</b>	<b>1,122.94</b>	<b>1,373.81</b>	<b>-18.3%</b>
Move Ahead WA Flexible (26Q) by Fee	2023-2025			2025-2027			10 Year Total		
	March 2025	June 2022	Change	March 2025	June 2022	Change	March 2025	June 2022	Change
EDL/EID from \$4 to \$7 per year	16.91	20.26	-16.6%	21.69	23.07	-6.0%	96.97	102.07	-5.0%
ADR from \$13 to \$17 and \$19 in FY30	9.16	9.40	-2.6%	9.43	9.64	-2.2%	67.16	68.54	-2.0%
DL/ID replacement from \$10 to \$20	4.19	3.98	5.2%	4.27	4.04	5.7%	21.54	20.45	5.3%
<b>Move Ahead WA Flexible (26Q)</b>	<b>30.26</b>	<b>33.65</b>	<b>-10.1%</b>	<b>35.39</b>	<b>36.76</b>	<b>-3.7%</b>	<b>185.09</b>	<b>190.92</b>	<b>-3.1%</b>
Aviation Fuel Tax (Fund 039)	2023-2025			2025-2027			10 Year Total		
	March 2025	June 2022	Change	March 2025	June 2022	Change	March 2025	June 2022	Change
Aviation fuel tax from \$.11 to \$.18 per gallon	5.12	3.34	53.2%	4.88	3.38	44.7%	24.46	17.05	43.4%
<b>Net Revenue from ESSB 5974</b>	<b>245.66</b>	<b>297.41</b>	<b>-17.4%</b>	<b>267.86</b>	<b>310.41</b>	<b>-13.7%</b>	<b>1,332.49</b>	<b>1,581.79</b>	<b>-15.8%</b>

\* Included technical cleanup bill ESHB 1853 (2023) resulted in all trucks being a subject to DOL service fee (\$0.50) and Licence plate technology fee (\$0.25)

\*\*Stolen Vehicle Check Fee from \$15 to \$50 and from \$50 to \$75 in FY2027 (26P fund, forecasted by WADOT)

## Economic Variables Forecast

In their revenue forecasts, analysts utilize a variety of economic and demographic variables to monitor trends. The Washington State Department of Transportation (WSDOT) and the Economic Revenue Forecast Council (ERFC) compile key economic variables, which include real personal income in Washington, inflation, sector-specific employment, housing starts, vehicles miles traveled, and sales of new light vehicles in the U.S.

The variables for March 2025 are based on forecasts provided by the Washington Economic and Revenue Forecast Council (ERFC), S&P Global, and the Office of Financial Management (OFM).

Below we present an analysis and key insights for fuel prices.

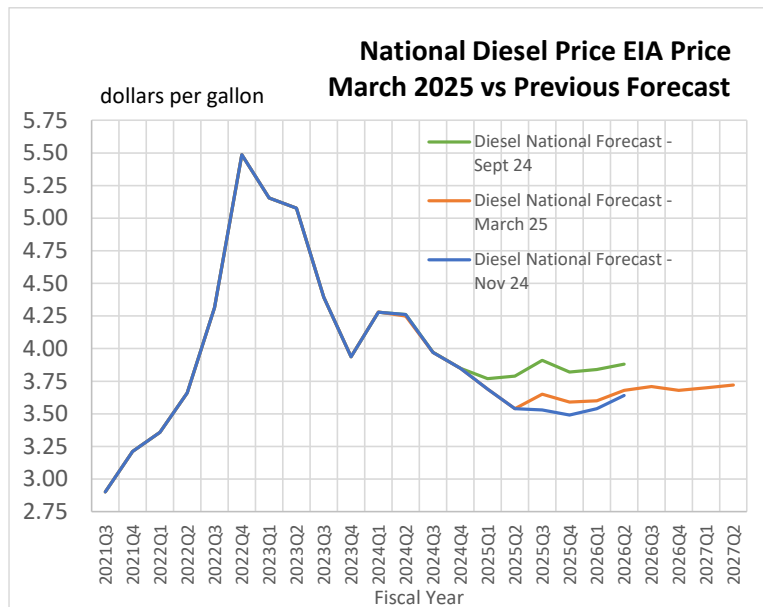
### Fuel Prices

The fuel price forecast has been updated using a similar methodology and the same price references described in detail in June 2024, Volume I. Biodiesel prices are based on Washington State Ferries' latest reported purchase price of biodiesel, including markup, delivery, and other tax costs (Adjusted Price Per Gallon, APPG).

The reference prices are derived from two primary sources:

- S&P Global: Gasoline Price. ERFC sends this file to partner forecasters prior to forecast.
- US Energy Information Administration (EIA): Diesel Price. This is from the EIA Short-Term Energy Outlook, February 2025.

Figure 5: National Diesel Price



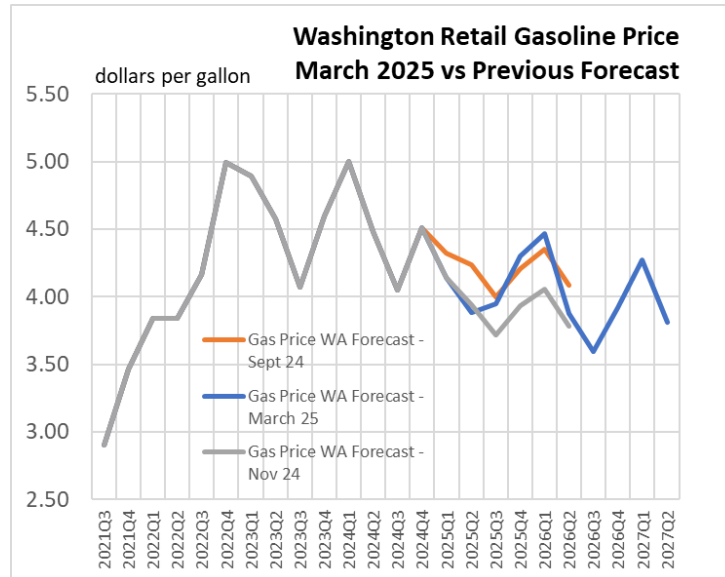
Source: EIA

Brent Oil prices have declined this year, and the biodiesel forecast aligns with diesel price trends. The figure indicates a change in the diesel price forecast since September, with an expected annual decrease of 6.8% by the end of the 2025 fiscal year, bringing the forecast close to \$3.6 per gallon.



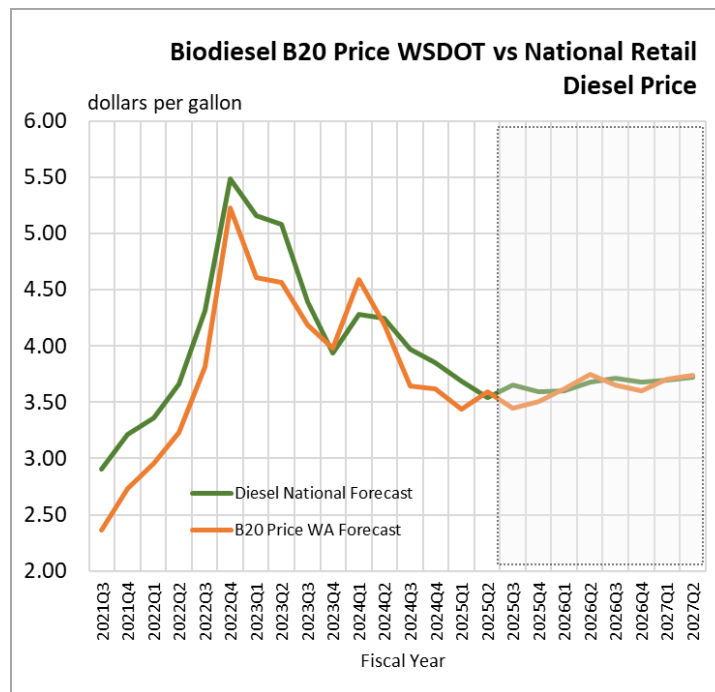
The fuel price forecasts for March 2025 are depicted below. The graphs show trends in various fuel prices from fiscal year 2022 to mid-2027, reflecting futures markets for Brent oil as detailed in the [STEO](#) report on pages 22 and 23. Gasoline prices have been decreasing since their peak in the first quarter of fiscal year 2024, with the forecast suggesting a price close to \$4.50 per gallon in the first quarter FY 2026.

**Figure 6: Washington retail gasoline price**



Source: ERFC estimates and S&P global national price of reference

**Figure 7: Washington biodiesel price**



Source: ERFC estimates and S&P global national price of reference

In the second quarter of FY 2025, biodiesel prices for B20 and B5 experienced year-over-year declines of 14% and 15%, respectively. The forecast indicates that prices may decrease to approximately \$3.50 per gallon for B20 and close to \$3.00 per gallon for B5 in the fourth quarter of FY 2025.

**Figure 8: Fuel prices forecast**

<b>Fiscal year - Quarter</b>	<b>Gas Price WA Forecast</b>	<b>Diesel Price Forecast</b>	<b>Diesel National Forecast</b>	<b>B20 Price WA Forecast</b>	<b>B5 Price WA Forecast</b>
2021Q3	2.90	3.00	2.90	2.36	2.02
2021Q4	3.47	3.36	3.21	2.73	2.37
2022Q1	3.84	3.64	3.36	2.95	2.60
2022Q2	3.84	3.92	3.66	3.23	2.90
2022Q3	4.16	4.53	4.31	3.82	3.55
2022Q4	5.00	5.66	5.49	5.23	4.74
2023Q1	4.89	5.42	5.16	4.61	4.25
2023Q2	4.58	5.26	5.08	4.57	3.98
2023Q3	4.07	4.64	4.39	4.19	3.71
2023Q4	4.60	4.33	3.94	3.98	3.62
2024Q1	5.00	4.71	4.28	4.59	4.39
2024Q2	4.48	4.64	4.25	4.19	3.62
2024Q3	4.05	4.14	3.97	3.65	3.12
2024Q4	4.51	4.06	3.85	3.62	3.14
2025Q1	4.15	3.92	3.69	3.44	3.07
2025Q2	3.95	3.76	3.54	3.59	3.06
2025Q3	<b>3.95</b>	<b>3.81</b>	<b>3.65</b>	<b>3.45</b>	<b>3.06</b>
2025Q4	<b>4.31</b>	<b>3.79</b>	<b>3.59</b>	<b>3.50</b>	<b>3.03</b>
2026Q1	<b>4.46</b>	<b>3.82</b>	<b>3.60</b>	<b>3.62</b>	<b>3.27</b>
2026Q2	<b>3.88</b>	<b>3.90</b>	<b>3.68</b>	<b>3.74</b>	<b>3.28</b>
2026Q3	<b>3.59</b>	<b>3.85</b>	<b>3.71</b>	<b>3.65</b>	<b>3.26</b>
2026Q4	<b>3.92</b>	<b>3.86</b>	<b>3.68</b>	<b>3.60</b>	<b>3.12</b>
2027Q1	<b>4.27</b>	<b>3.90</b>	<b>3.70</b>	<b>3.70</b>	<b>3.36</b>
2027Q2	<b>3.81</b>	<b>3.91</b>	<b>3.72</b>	<b>3.74</b>	<b>3.28</b>

Source: ERFC estimates

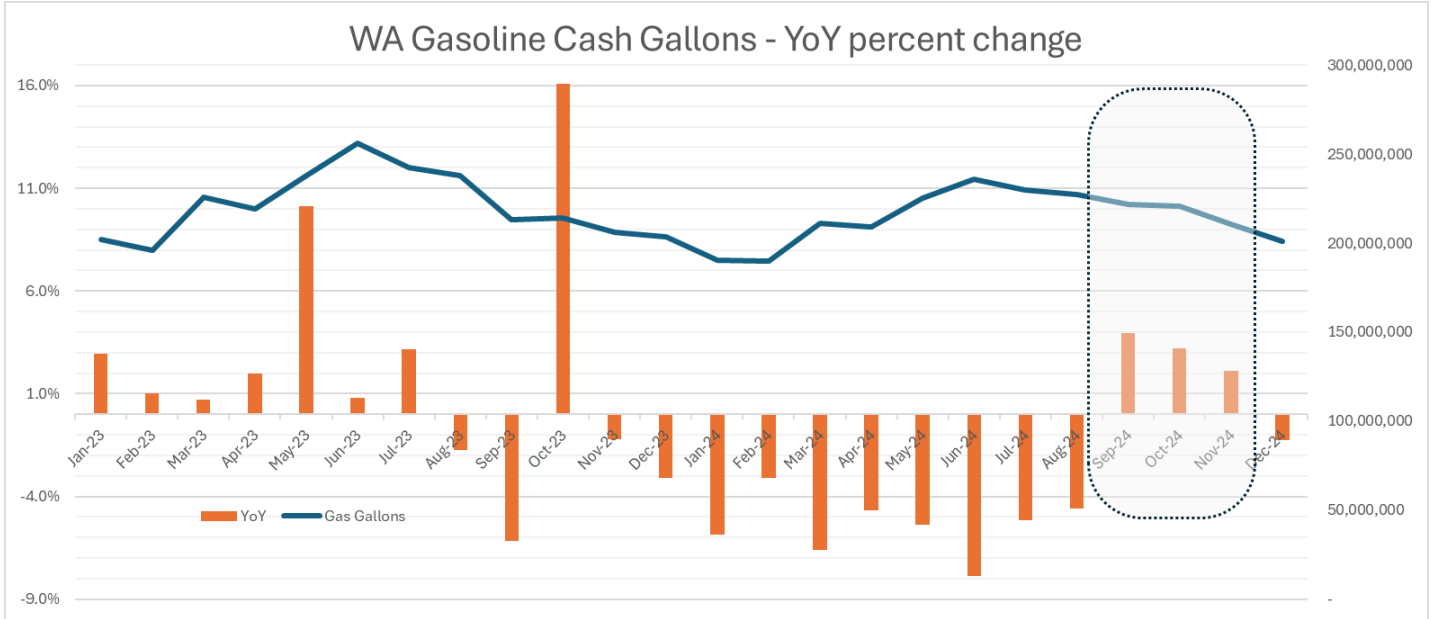
### Motor Vehicle Fuel Tax Forecast

The Motor Vehicle Fuel Tax (MVFT) forecast is divided into two primary categories: Gasoline (Gas) and Special Fuels (SF). The MVFT forecast, along with the corresponding revenue forecast and distributions, has been updated.

Fuel consumption (expressed in cash gallons: revenue divided by the tax rate) was forecasted using models that employed quarterly data. The two principal explanatory variables for gas gallonage are Washington state employment and electric vehicle registrations. For special fuels, the main variable is Washington taxable sales adjusted for inflation. Tribal refunds by fuel type were also forecasted, and the Department of Licensing (DOL) projected snowmobile refunds.

The ERFC has been monitoring gallonage through Treasury reports and calculating the annual percentage change. The accompanying graph shows that gasoline consumption increased in the fall of 2024 after ten months of demand contraction. The March 2025 forecast now anticipates a decrease of -1.4%, returning to a level like the one predicted in the September 2024 forecast, which anticipated a -2% change for FY 2025.

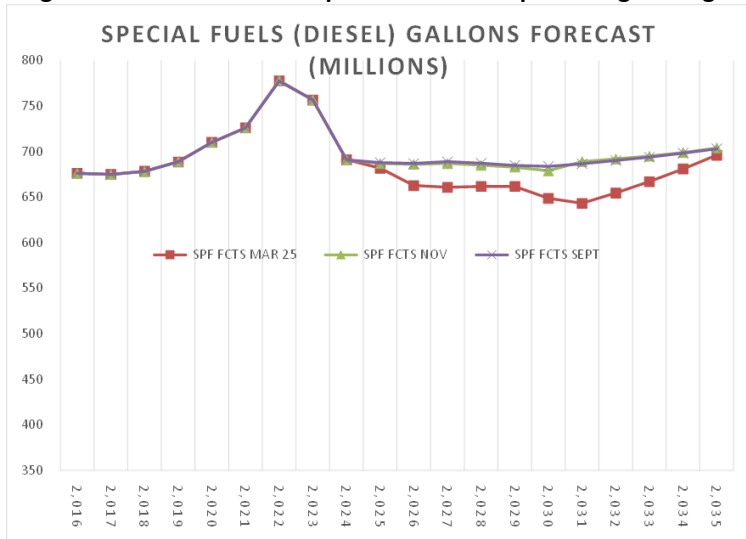
**Figure 9: Gasoline consumption and annual percentage change**



Source: ERFC estimates – Treasury reports

The forecast for special fuels consumption is lower than the previous forecast by -0.8% for fiscal year 2025 and by -3.4% for fiscal year 2026. The gap between the previous and new forecasts widens for later fiscal years, with the new forecast being -6.6% lower for fiscal year 2021. This is explained by the increase in inflation and the consequent reduction in projected real taxable sales (adjusted for inflation).

**Figure 10: Gasoline consumption and annual percentage change**



Source: ERFC estimates – Treasury reports

The forecast for total motor fuel consumption is higher than the previous forecast by 3.0% for fiscal year 2025 and by 4.0% for gasoline. The gap between the previous and new forecasts widens for later fiscal years, with the new forecast being 3.7% higher for all motor fuels in fiscal year 2031.

Washington State is expected to collect approximately \$3.23 billion from the Motor Vehicle Fuel Tax (MVFT) in the 2023-2025 biennium, an increase of \$49 million or 1.6% from the earlier forecast. For the 2025-2027 biennium, MVFT revenue is projected at \$3.18 billion, which is an increase of \$111 million or 3.6% compared to the previous projection.

## Motor Vehicle Revenue (Licenses, Permits, and Fees)

### Overview

Vehicle-related forecasts fall into two main categories: motor vehicle registrations and license plate-related fees. These forecasts have a variety of small fees, but most of the revenue is from registration-based fees. There are five main economic drivers of the vehicle licenses, permits, and fees (LPF) forecast: Washington population and net migration, Washington real personal income, Washington Non-ag Employment, Washington - U.S. real income share, and U.S. sales of light vehicles.

The vehicle registration forecasts, and corresponding revenue forecasts have been updated. The new forecasting models are similar to previous models but use quarterly data. The forecast for cars is slightly lower than the November forecast due largely to the fact that actual car registrations were slightly lower than expected and the forecast for non-farm employment is lower than in November. The forecast for trucks is also now based on a model using quarterly data. The truck registration forecast is slightly higher than the previous forecast but the variance between the forecasts diminishes over time. This is because actual truck registrations since last forecast were just slightly higher than the forecasted amount but the forecast for non-farm employment is lower than November. The fees used to convert vehicle registrations to revenues are unchanged from the prior forecast except for the base fees. There are small changes to the forecast for motorhomes, travel trailers, and other vehicle types.

Washington State anticipates collecting about \$1.99 billion from vehicle licenses, permits, and fees (LPFs) in the 2023-2025 biennium, which is a decrease of \$4.3 million or 0.21% compared to the forecast for September 2024. The LPF forecast is anticipated to be \$2.14 billion by the 2025-2027 biennium, which is down about \$6.4 million or 0.30% from the previous forecast.

The March 2025 forecast of LPF revenue projected by the Department of Licensing includes the following revenue sources:

- Dealer temporary permit, registration, and plate fees.
- DOL services account.
- Electric vehicles and charging infrastructure fees.
- Plates: original, replacement, transfer, and reflectivity; multimodal account and license plate technology.
- Title fees: regular and quick title.
- Vehicle business licenses.
- Service and filing fees.
- Other fees: abandoned RV disposal, IFTA decals, intermittent-use trailers, multiuse roadway fees.

These LPF fees are deposited into 15 different accounts, including Motor Vehicle Account Capital Vessel Replacement Account, and Move Ahead WA.

DOL forecasted portion of LPF revenue for 2023-25 biennium is \$511.5 million, an increase of \$0.7 million (0.13%) from the prior forecast, while 2025-27 biennium is relatively unchanged. Over the ten-year period of FY2026-2035, DOL forecasted LPF revenues are projected to total \$3,906 million, an increase of \$13 million (0.34%) from the prior forecast.

### Primary reasons for the change in the March 2025 forecast

- **Plate Transfer** forecast is significantly higher in FY 2025 by \$533.7 thousand. It was discovered during work related to the OneWA project that there had been under-reported plate transfer revenue and transactions in recent years. The forecast-to-forecast change for March 2025 is directly related to data revision correcting for the

under-reported activity of this series. Overall, the forecast is higher by \$1.05 million on average per biennia for FY 2025-35. The plate transfer forecast is a relatively small component of the plate-related revenue.

- **Abandoned Vehicle Fee** forecast is lowered by \$0.3 million (-6%) in the current biennium, by \$0.7 million (-12%) in the 2025-27 biennium, and the ten-year outlook is lowered by \$3.3 million (-12%) compared to previous forecast.
- **Title Fee** forecast is unchanged in the current biennium, lowered by \$0.7 million (-1%) for the 2025-27 biennium and increased by \$3.5 million (1%) for the ten-year horizon compared to previous forecast. The trend is following February light vehicle sales long term updated variable.
- **Service Fee** forecast is lowered by \$0.6 million (-1.3%) in the current biennium, by \$0.8 million (-1.8%) in 2025-27 biennium, and lowered by \$2.3 million (-1%) in the ten-year outlook compared to previous forecast. The change is due to current DOL/subagents share adjustments and actuals update.
- **Plate Replacement Fee** forecast is increased by \$1.2 million (1.5%) for the 23-25 biennium, increased by 0.8 million (0.92%) for the 2025-27 biennium and the ten-year outlook is increased by \$3.9 million (0.9%) compared to previous forecast.
- **Electric Vehicle Charging Infrastructure (\$75 fee)** forecast is increased \$0.4 million (0.7%) for the 23-25 biennium, increased by 1 million (1.3%) for the 2025-27 biennium and the ten-year outlook is increased by \$4.4 million (0.6%) compared to previous forecast.
- **Dealer Temporary License Plate** forecast is lowered by \$1.4 million (-3%) in the 2023-25 biennium and by \$0.6 million (-1%) in 2025-27 biennium, and the ten-year outlook is increased by \$2.6 million (1%) compared to previous forecast. Adjustments made due to an actuals trend observation.

## Driver Related Revenue Forecasts

### Overview

The *March 2025* forecast of driver-related revenue projected by the Department of Licensing includes the following revenue sources:

- Driver license fees: commercial driver licenses, enhanced driver licenses, and temporary restricted licenses
- ID card fees
- Driver exam application fees
- Abstract driving records (ADR)
- Motorcycle operator fees
- Ignition interlock fees,
- Other miscellaneous fees: limousine licenses, fines and forfeitures, and driver school instructor license fees.

These driver-related fees are deposited into the Highway Safety Fund (HSF), Motorcycle Safety Education Account (MSEA), the State Patrol Highway Account (SPHA), and Ignition Interlock Revolving Account (IIRA).

Driver-related revenue for FY 2023-25 biennium is forecasted at \$353.9 million, \$2.5 million higher (0.7%) from the prior forecast. FY 2025-27 is expected to have \$395 million, an increase of \$0.9 million (0.2%) from the prior forecast. Over the ten-year period of FY2026-2035, driver-related revenues are projected to total \$1.921 billion, \$4.5 million (-0.2%) lower than the prior forecast.

It is important to note that with SHB1207 passed in the 2021 legislative session, DOL offers eight-year licenses and ID cards, along with the existing six-year license and IDs. For the first four years of implementation, all first time Driver/ID issuances will have variable renewal terms while Driver and ID renewals will follow either a six- or eight-year renewal cycle depending on customer choice. Caution is advised in year-over-year comparisons.

*Notable changes in the **March 2025** forecast:*

Total Driver Licenses Fees revenue actuals track very higher (8% average variance over 3 months) to September 2024 forecast. Of note is the increase trend to Enhanced Driver License (EDL) and Identification (EID), in addition to increase trend in Driver License Reissues.

- **EDL and EID** forecast increased by \$2.9 million (8%) for 2023-25 biennium, while the 10-year forecast is lowered by \$2.8 million (-1%) compared to previous forecast. A recent informational campaign related to REAL ID implementation in May 2025 contributed to the short-term increase.
- **Driver License Reissue** forecast increased by \$0.3 million (3.6%) for 2025-27 biennium. The 10-year forecast increased by \$1.4 million (3.8%). Adjustment is based on recent trends for these transactions.

## **Other Transportation Related Revenue Forecast**

### *Overview*

This category of transportation related revenue forecasts consists of four primary components: vehicle sales and use taxes, rental car sales taxes, studded tire fees, business and other revenue and aeronautics revenue. The business and other revenue category includes the following revenue sources:

- Sales of property
- WSP and DOT services and publications and documents
- Filing fees and legal services
- Property management
- Access Permits (Highways)
- Outdoor Advertising
- Other revenues
- Speed Safety Camera Systems

During the 2024 Legislative Session, SSB 6115 passed, and it will amend RCW 46.63.200. The RCW continues to authorize use of automated Speed Safety Camera Systems (aka Work Zones Speed Cameras (WZSC)) in active work zones on state highways. The intention of WZSC is to help reduce vehicle speeds in active work zones while increasing overall safety for travelers and workers, alike. The penalty for a speed safety camera system violation is: (a) \$0 for the first violation; and (b) \$248 for the second violation, and for each violation thereafter. Revenue generated from these systems must be deposited into the Highway Safety Fund and first used exclusively for operating and administrative costs associated with these systems. Any revenue that exceeds the operation and administrative costs must be distributed for the purpose of traffic safety, including but not limited to, driver training education, and local DUI emphasis patrols.

The Washington State Department of Transportation (WSDOT) and the Washington State Patrol (WSP) were originally directed to collaborate and have operational Speed Safety Camera Systems in place by July 1, 2024. The deployments have been pushed back to March of 2025. This is due to reaching an impasse during contract negotiations

with the first selected apparent Successful Vendor (ASV). An updated RFP was released April 2, 2024. These systems will be in place through September 30, 2030. Both agencies have been working diligently to lay the groundwork for successful implementation. We have been Integrating best practices for how these systems are deployed around the country; and are engaged in ongoing discussions about rulemaking refinements. We have recently concluded a Request for Proposal (RFP). We estimate the five-year horizon, Speed Safety Cameras revenues of \$73.4M.

State Patrol Highway Account miscellaneous revenue consists of ACCESS fees (fees charged for usage of our statewide law enforcement telecommunications system), Breathalyzer Test fines, DUI Cost Reimbursement, Commercial Vehicle Penalties and Communication Tower Site Leases and Terminal Safety Inspection fees.

#### *Primary reasons for the change in the March 2025 Forecast*

- In the March 2025 forecast, the sales and use tax on motor vehicle purchases is higher than in the previous forecast. Sales tax collections came in higher than forecast while use tax collections came in lower. Because sales tax collections make up most of the combined revenue, the forecast was increased.
- Rental car tax collections have been decreased due to lower than forecasted collections in recent months.
- Forecasted heavy equipment tax collections have decreased since the previous forecast due to lower than forecasted actuals.
- HOV penalties in March 2025 are unchanged from the last forecast.
- **WSDOT Business related revenue** for the 2023-25 biennium has been revised down by \$1.5 million, or 4.3%, from the November forecast. This is due primarily to actuals coming in for sale of property. There was also an accounting adjustment in revenue for Filing Fees and Legal Services. **The School Zone Fines** forecast for the current biennium is up \$45 thousand, or 10.1%, from the March forecast. These changes reflect updated actuals coming in.
- **Speed Safety Cameras Systems** - As the program becomes operational and actual trends are observed, WSDOT will update the forecast to ensure more accurate projections. In future biennia, WSDOT will incorporate additional variables to further enhance forecast accuracy. The forecast is down about \$3.5M or 72.5% in the current biennium. This decrease is due to the delay of the program starting and causing revenue collection to be pushed out.
- **WSP Business Related Revenues** for the 2023-25 biennium have been revised up by \$47,067 or (.39%). The change reflects latest actuals.
- **Aviation Fuel Tax (039)** forecast is tracking well with actuals-to-date and is consistent with recently observed increases to taxable gallons. Overall, the forecast is slightly increased by \$49.2 thousand or 0.6% For current biennium. The 10-year forecast is unchanged.
- **Driver Licensing Technology Support Account (25W)** is collected by Administrative Office of the Courts (AOC) for supporting information technology systems used by the Department of Licensing to communicate with the judicial information system, manage driving records, and implement court orders. DOL forecasts this revenue on behalf of AOC. We are unsure whether the lower actuals are caused by fundamental trend change or an after effect of Washington Courts network outage for the two weeks of November 2024. For the 23-25 biennium, the forecast is reduced by \$260 thousand (-6.5%). Long term forecast is revised down by \$4.2 million (-19%)

Total Other Transportation Related revenues in the 2023-25 biennium are currently projected at \$383 million. This



represents a decrease of \$4.4 million, or -1.14% compared to February 2024 forecast. Ten-year (2023-2033) total revenue of \$2.0 billion is \$32.04 million decrease compared to February 2024 Forecast.

## Ferry Ridership and Revenue

### *Summary*

Ridership for the 2023-2025 biennium is projected to be nearly 38.4 million, approximately 0.5% greater than previously forecasted, with four months of forecasted values remaining in FY 2025. Over the same period, total revenue is projected to equal \$379.3 million, comprising \$370.6 million in farebox and surcharge revenues plus \$8.7 million in miscellaneous revenue, which overall is 1.3% greater than the prior November Forecast.

Over the subsequent 10 years from FY 2026 through FY 2035, ridership is projected to be 0.8% to 2.1% higher than previously forecasted, while total farebox and miscellaneous revenues combined are projected to range from 0.7% to 2.6% higher than in the prior forecast.

A portion of the upward revision to the projected ridership demand can be attributed to actual ridership levels in the last four months exceeding forecasts. Ridership from November 2024 through February 2025 grew by 4.0% over the same four months in FY 2024, and exceeded the November Forecast by 0.6% despite inclement weather severely dampening February's ridership. Modest improvements in service reliability and vessel availability may be contributing to signs of strengthening ridership demand. By FY 2035, projected ridership is expected to reach 96% of pre-pandemic levels.

Additionally, lower real gasoline price projections by midsummer, higher working-age population forecasts, and higher inflation projections — which result in lower real fares — collectively bolster ferry ridership demand more than the offsetting effects of lower projections for real personal income, employment, and retirement-age population levels.

### *Overview*

The fare revenue and ridership projections for Washington State Ferries are prepared using (1) systemwide econometric models to estimate overall demand by fare category, (2) autoregressive-integrated-moving average time series models to allocate monthly ridership demand across the 10 routes and seven fare categories, and (3) a set of spreadsheet models to assess vessel capacity constraints on ridership and calculate revenue projections. Ridership and revenues are estimated for the following seven fare categories.

- Passenger full fares
- Passenger frequent user/commuter discounted multi-ride fares
- Passenger other discount fares (e.g., senior fare, youth fare)
- Auto / driver full fares
- Auto / driver frequent user/commuter discounted multi-ride fares
- Other vehicle / driver discounted (senior/disabled auto and all motorcycle) fares
- Oversize vehicle / driver (over 22 feet in length) fares

In August 2023, the Washington State Transportation Commission (WSTC) adopted two fare increases for FY 2024 and FY 2025. The first took place on October 1, 2023 and the second on October 1, 2024. Both increases raise the base passenger and vehicle/driver fares by 4.25% with nickel rounding. At the same time, a temporary 1% additional discount to multi-ride passes was implemented to dampen the fare increases experienced by frequent users. The temporary additional discount will expire on September 30, 2025. With no further fare increases assumed in the March Forecast, fares are expected to slowly decline in real terms as a result of general price inflation after FY 2025.

The March 2025 Forecast incorporates actual ridership data through February and actual revenue through January.

### *COVID-19 Impacts and Service Level Constraints*

Beginning in early March 2020, the COVID-19 pandemic negatively impacted ferry travel, with April 2020 ridership 73% lower than April 2019. Since then, the rebound in ridership has been somewhat variable and extended, reflecting post-pandemic travel patterns, including less frequent use by many customers, combined with reduced and uncertain service levels. This forecast takes into consideration the WSF Service Contingency Plan released in January 2024 as well as more recent efforts to accelerate some service improvements as fleet availability allows. Nonetheless, the ridership and revenue forecasts acknowledge that vessel and/or crew shortages may impact service reliability, with stable, full-service restoration awaiting the arrival of new ferries starting in mid-2028 (FY 2029). The March 2025 Forecast includes the following assumptions regarding service levels:

- The Fauntleroy-Vashon-Southworth triangle route is assumed to operate with two vessels until there is sufficient vessel availability to restore three-boat service. That is now expected to occur by mid-2026 (FY 2027), nearly two years earlier than assumed in the prior November 2024 Forecast.
- A second boat on the Seattle-Bremerton route is assumed to be reinstated by mid-2025, which is up to three years earlier than assumed in the prior November 2024 Forecast.
- On the Port Townsend-Coupeville route, resumption of the second vessel normally added for the late Spring and Summer seasons is assumed to restart in mid-2025 (FY 2026), up to three years earlier than previously assumed.
- The Point Defiance-Tahlequah, Anacortes-San Juan Island, Seattle-Bainbridge, Mukilteo-Clinton, and Edmonds-Kingston routes will continue to operate the majority of the time with the normal number of vessels.
- Resumption of service on the Anacortes-Sidney, B.C. international route is assumed to be delayed until Summer 2030 (FY 2031), which will also add limited capacity to summer service in the San Juan Islands as a fifth vessel. Anacortes-Sidney, B.C. ridership demand is then expected to ramp up over a three-year period.
- Winter 2025 service on the Anacortes-San Juan Islands route is assumed to be upgraded with the inter-island boat operating every day of the week allowing service to match that of the Fall and Spring seasons for FY 2025 only.

### *Ridership*

In the first eight months of FY 2025, actual ridership averaged 2.7% higher than the same period in FY 2024, with passenger fares 3.3% higher and vehicle/driver fares 1.9% higher. Overall ridership growth FY 2025-to-date is lower than the growth experienced in FY 2024, albeit higher for vehicle/driver ridership which contribute more to revenues. Total ridership in the first eight months of FY 2025 is at about 79% of comparable pre-pandemic (FY 2019) levels.

From November 2024 through January 2025, actual ridership ranged from 4.6% to 15.3% higher than that same months in the prior fiscal year, exceeding the November Forecast monthly values by 2.2% to 5.6%. However, February 2025 ridership was 9.6% below the February 2024 level, falling short of the November Forecast by 8.5%. The weaker February 2025 performance can be largely attributed to inclement weather and tidal conditions, which resulted in some canceled sailings as well as dampening demand. On average across all four months, ridership was 4.0% higher than the same period in FY 2024, with passenger fares 4.8% higher and vehicle/driver fares 3.2% higher. This is 0.6% higher than the prior November Forecast, with passenger fares 2.1% below forecast and vehicle/driver fares 3.4% above forecast.

For FY 2025 overall, inclusive of eight months of actual data, ridership is projected to be 1.1% higher than in the prior November forecast. This amounts to a 0.5% increase in ridership over the full 2023-25 biennium compared to the November Forecast. Over the rest of the forecast horizon (FYs 2026-35), the March ridership projections range from 0.8% to 2.1% higher than the November Forecast.

## *Revenues*

Total reported fare and surcharge revenues for the first seven months of FY 2025 (through January 2025) were 7.7% higher than the same period in FY 2024. Actual revenue performance for the three most recent months recorded (November 2024 – January 2025) collectively exceeded the November Forecast by 1.7%. Revenue for FY 2025 comprise approximately 94% of the pre-pandemic fare revenue levels, a share that exceeds the corresponding pre-pandemic ridership share of 79% due to a series of general fare increases and a doubling of the fare surcharge for capital since the pandemic, along with stronger growth in higher-fare vehicle traffic.

In the current 2023-25 biennium, fare and fare surcharge revenues are projected to be 1.4% higher, while miscellaneous revenues are forecast to be 1.2% lower, than in the prior November Forecast. Total 2023-25 biennium fare and miscellaneous revenues are expected to be \$379.3 million, 1.3% higher than the November forecast of \$374.5 million.

Subsequent biennia fare and surcharge revenue projections are expected to range from 0.9% to 1.9% higher relative to the November forecast. Miscellaneous revenues for the subsequent five biennia are each projected to range from 4.6% to 5.0% below the previous forecast, with overall ferry revenues ranging from 0.7% to 1.7% higher than the prior projections. Over the 10 years from FY 2026 through FY 2035, fare and miscellaneous revenues are projected to total \$2.27 billion, about 1.2% above the prior forecast.

## *Impact of Youth-Fare Elimination*

The elimination of youth fares starting October 1, 2022 is included in the current March Forecast and amounts to a reduction in fare and surcharge revenues of \$4.4 million for FY 2025, and between \$4.4 million and \$5.2 million in subsequent fiscal years.

## *Forecast Change Primary Drivers*

The primary reasons for the changes in the March 2025 Forecast are:

- Actual ridership levels for November 2024 through February 2025 were, on average, higher than previously forecast, bringing up the current ridership and revenue forecasts for FY 2025.
- Forecast revisions resulting in lower real gasoline prices starting this summer, higher working-age population, and higher inflation projections — which result in lower real fares — contribute to higher ridership forecasts. These factors collectively more than offset the ridership demand dampening effects from lower projections for real personal income, retirement-age population levels, and current decade employment.
- Total miscellaneous revenues have been revised lower throughout the forecast horizon, primarily due to changes in vendor projections for terminal revenues. These impacts offset the slightly higher vessel non-fare revenues due to the higher underlying ridership projections.

## *Forecast Disclaimer*

Since the COVID-19 pandemic, material changes to the previous normal ferry ridership patterns continue to persist and slowly evolve toward a “new normal”. Total passenger fares, while showing recent improvement, continue to lag further behind pre-pandemic levels than do vehicle/driver fares. While service improvements continue, WSF continues to experience a lower level of service reductions and reduce service reliability when compared with pre-pandemic levels a result of fleet constraints and staffing issues. The duration and magnitude of these combined effects and how they will continue to impact ferry ridership demand, while becoming more apparent with contingency planning, retain some degree of uncertainty. As such, the March 2025 Forecast projections, as well as the assumptions upon which they are based at the

time of preparation, remain subject to change with an above average level of risk and uncertainty, which may cause actual results to vary from projections.

## Toll Revenue

### Overview

The traffic and potential toll revenue forecasts for all five toll facilities for the March 2025 TERFC are provided by independent traffic and revenue consultant, Stantec. The adjusted toll revenue forecasts for the SR 520 Bridge, I-405 Express Toll Lanes (ETLs), and SR 99 Tunnel are prepared by WSP USA Inc., in close coordination with the WSDOT Toll Division and its consultants.

The Toll Traffic and Revenue (T&R) forecasts for all five toll facilities for the March 2025 TERFC are a no-change forecast as compared to the November 2024 TERFC forecasts. FY 2024 Toll Traffic and Revenues are based on final FY 2024 Financial Statements.

The methodology for the March 2025 TERFC forecast update is similar to the ones applied in the previous forecasts and has not changed since the November 2024 TERFC forecast.

### Of note:

- The overall forecasting methodology is similar to the ones applied since the June 2020 and subsequent forecasts, with usage of recent reported data, as applicable, and assuming a different forecast pattern for each facility based on the observed trends.
- Each toll facility has been analyzed independently, with the reported total traffic, average toll rate, and total revenue by month used as the key inputs.
  - FY 2024: Toll Traffic and Revenue (T&R) results are confirmed and audited with final FY 2024 Financial Statements
  - FY 2025-32: annual T&R forecasts for all five toll facilities are a no-change forecast.
- Adjustments for revenue leakage and rates of toll bill recovery in the civil penalty process are unchanged from the November 2024 forecast. This includes payment of toll bills and fees in the civil penalty process through the Customer Program for Resolution (CPR), referred to as recaptured toll revenue.
  - Transponder revenue reflects updated reported values through September.
  - Interest earning forecasts for TNB, SR 520 and SR 99 are unchanged and will be reevaluated with any future changes in the T&R forecasts.

### Other General Assumptions:

- The forecast assumes that Pay By Mail customers would continue to pay \$2 above the Good To Go! toll rates for 2-axle vehicles. A similar rate differential for trucks based on the number of axles is also assumed.
- Adjustments to potential gross toll revenue forecasts include the \$0.25 per transaction fee revenue for Good To Go! account-based Pay By Plate transactions, leakage allowances for toll revenue not recognized (unbillable), unpaid toll bills, and toll revenue recovered through Civil Penalty adjudication for customers using the Customer Program for Resolution (CPR) at the Good To Go! toll rate.
- An adjustment is made for CPR toll revenue, which is recorded at the Good To Go! toll rate in the reported values. In addition to toll revenue captured through CPR at the Good To Go! toll rate instead of the Pay By Mail toll rate, there is toll revenue collected associated to toll revenue recovered at the Pay By Mail toll rate included in the revenue category for civil penalties and recovered toll revenue.
- Forecasts for second toll bill \$5 rebilling fees and \$40 Notice of Civil Penalty (NOCP) fees are based on reported collection rates, adjusted to reflect delays in toll bill escalation that commenced in March 2023.
  - Collection of rebilling fees commenced in March 2023, and with NOCP fee revenue starting to be collected in FY2024.
  - Revenue estimates for Civil Penalties in FY 2025 include reported values through September 2024.

- Transponder revenue forecasts are estimated based on a systemwide approach; the adjustments include reported data through September used to inform overall sales trends, weightings between direct retail and wholesale sales and revenue per transponder sold.

**Recent Reported: FY 2025 Q2 (October through December 2024) and FY 2025 YTD (July through December 2024) in comparison to November 2024 TRFC Forecast**

October 2024 is a first month to be compared to November 2024 TERFC Forecast.

Toll Traffic for all facilities combined Q2 (October through December 2024) is above the November 2024 Forecast by 2.7%, FY 2025 YTD Toll Traffic is above the forecast by 1.3%.

Toll Revenue for all facilities combined Q2 (October through December 2024) is above the November 2024 Forecast by 4.4%, or \$2.4 million. FY 2025 YTD Toll Revenue is above the forecast by 2.1%, Figure 9.

As a note, I-405 ETLs FY 2024 Q2 and YTD reported toll traffic is aligned with the forecasted values; however, actual toll revenue performance is above the forecast, as average toll rates had been higher than forecasted during this period. Monitoring of the variability of the average toll rates of this dynamically-priced facility will continue, and appropriate modifications may be made for future forecasts.

**Figure 11: FY 2025 Q2 (July through September 2024) and FY 2025 YTD Toll Transactions and Revenue Performance vs November 2024 Forecast (millions)**

Toll Facility		Toll Transactions					Adjusted Toll Revenue					
		Oct-24	Nov-24	Dec-24	FY 2025 Q2	FY 2025 YTD	Oct-24	Nov-24	Dec-24	FY 2025 Q2	FY 2025 YTD	
TNB	Forecasted Transactions	1.38	1.29	1.30	3.97	8.30	Forecasted Toll Revenue	\$6.43	\$6.00	\$6.01	\$18.44	\$38.80
	Reported Transactions	1.38	1.28	1.32	3.97	8.30	Reported Toll Revenue	\$6.61	\$5.87	\$5.98	\$18.46	\$38.82
	Variance From Forecast	0.00	-0.01	0.01	0.00	0.00	Variance From Forecast	\$0.19	-\$0.13	-\$0.03	\$0.02	\$0.02
	Variance - % Change	-0.3%	-0.7%	1.1%	0.0%	0.0%	Variance - % Change	2.9%	-2.2%	-0.4%	0.1%	0.1%
SR 520	Forecasted Transactions	1.75	1.57	1.50	4.82	10.06	Forecasted Toll Revenue	\$7.10	\$6.28	\$5.91	\$19.29	\$38.81
	Reported Transactions	1.86	1.74	1.71	5.31	10.56	Reported Toll Revenue	\$7.21	\$7.00	\$6.51	\$20.72	\$40.23
	Variance From Forecast	0.11	0.17	0.21	0.49	0.49	Variance From Forecast	\$0.11	\$0.72	\$0.60	\$1.42	\$1.42
	Variance - % Change	6.5%	10.8%	14.1%	10.3%	4.9%	Variance - % Change	1.5%	11.4%	10.1%	7.4%	3.7%
I-405	Forecasted Transactions	0.90	0.71	0.73	2.34	4.88	Forecasted Toll Revenue	\$2.77	\$2.05	\$1.78	\$6.60	\$13.67
	Reported Transactions	0.86	0.72	0.75	2.33	4.87	Reported Toll Revenue	\$2.60	\$2.65	\$2.75	\$8.00	\$15.06
	Variance From Forecast	-0.04	0.00	0.02	-0.01	-\$0.01	Variance From Forecast	-\$0.18	\$0.60	\$0.97	\$1.40	\$1.40
	Variance - % Change	-4.0%	0.2%	3.1%	-0.5%	-0.2%	Variance - % Change	-6.4%	29.4%	54.5%	21.1%	10.2%
SR 167	Forecasted Transactions	0.16	0.14	0.14	0.43	0.90	Forecasted Toll Revenue	\$0.62	\$0.51	\$0.46	\$1.59	\$3.52
	Reported Transactions	0.16	0.14	0.13	0.43	0.90	Reported Toll Revenue	\$0.59	\$0.56	\$0.50	\$1.66	\$3.59
	Variance From Forecast	0.00	0.00	-0.01	0.00	0.00	Variance From Forecast	-\$0.03	\$0.06	\$0.04	\$0.07	\$0.07
	Variance - % Change	1.4%	1.3%	-5.3%	-0.8%	-0.4%	Variance - % Change	-4.7%	11.0%	8.8%	4.2%	1.9%
SR 99	Forecasted Transactions	1.66	1.26	1.40	4.33	9.32	Forecasted Toll Revenue	\$3.16	\$2.42	\$2.66	\$8.24	\$17.09
	Reported Transactions	1.53	1.38	1.36	4.27	9.26	Reported Toll Revenue	\$2.77	\$2.58	\$2.37	\$7.73	\$16.57
	Variance From Forecast	-0.13	0.12	-0.05	-0.06	-0.06	Variance From Forecast	-\$0.39	\$0.16	-\$0.29	-\$0.52	-\$0.52
	Variance - % Change	-8.1%	9.7%	-3.2%	-1.3%	-0.6%	Variance - % Change	-12.4%	6.7%	-10.8%	-6.3%	-3.0%
Total	Forecasted Transactions	5.84	4.97	5.08	15.89	33.46	Forecasted Toll Revenue	\$20.09	\$17.26	\$16.83	\$54.17	\$111.88
	Reported Transactions	5.78	5.25	5.28	16.31	33.88	Reported Toll Revenue	\$19.78	\$18.66	\$18.12	\$56.56	\$114.28
	Variance From Forecast	-0.06	0.29	0.20	0.42	0.42	Variance From Forecast	-\$0.30	\$1.40	\$1.29	\$2.39	\$2.39
	Variance - % Change	-1.0%	5.8%	3.9%	2.7%	1.3%	Variance - % Change	-1.5%	8.1%	7.7%	4.4%	2.1%

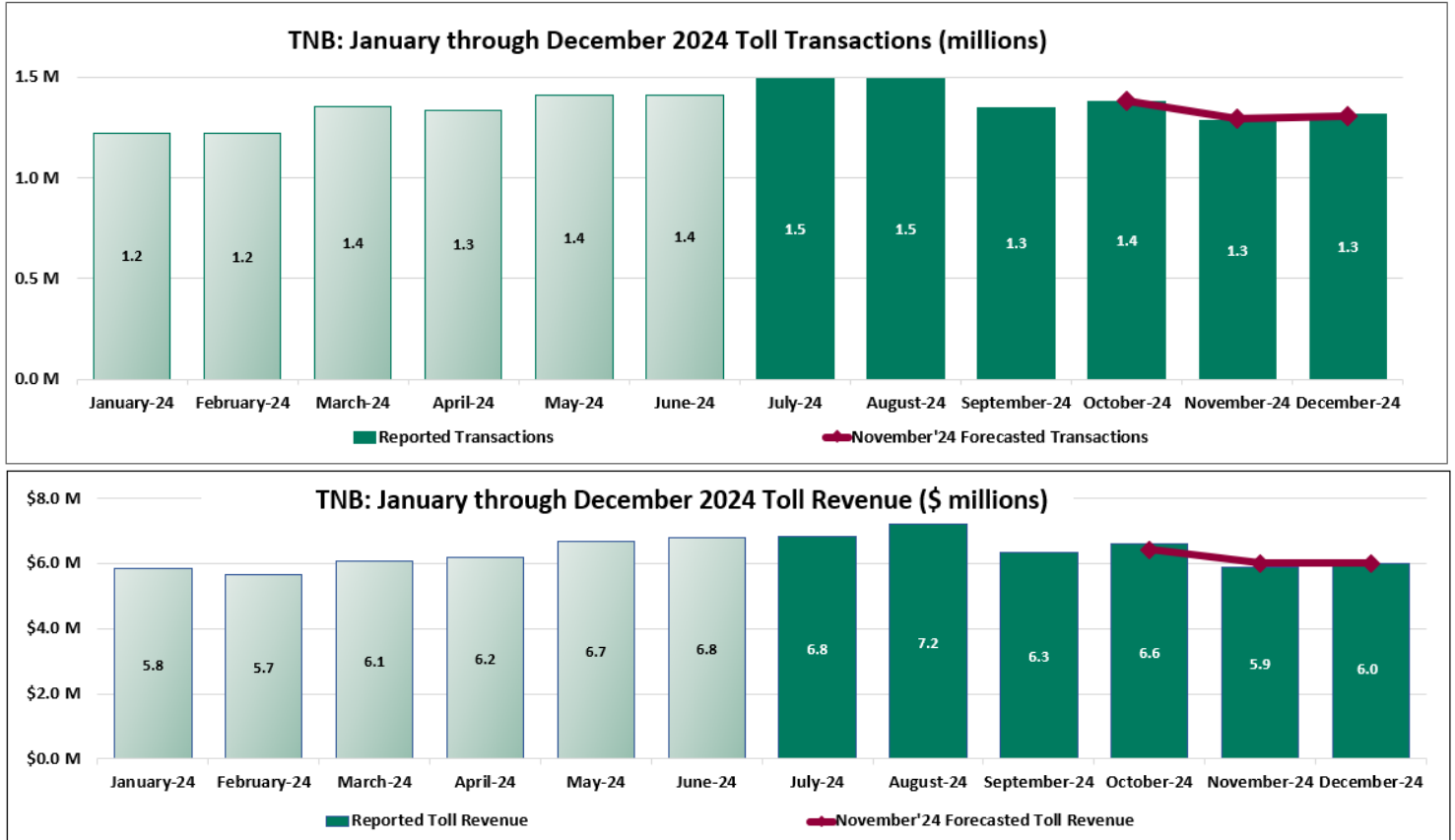
**Updates to Tacoma Narrows Bridge (TNB) toll traffic and revenues**

The March 2025 Tacoma Narrows Bridge’s (TNB) toll traffic and revenue annual forecasts are a no-change forecast as compared to the November 2024 forecasts.

Three-month (October through December 2024) Toll Traffic and Toll Revenue are in line with the November 2024 Forecast,

with less than a one percent variance. Figure 11 below provides 12-month Toll Transactions and Reported Toll Revenue performance in comparison to the November 2024 Forecast.

**Figure 12: TNB 12-month Toll Traffic and Revenue actuals in comparison to November 2024 forecasts**



*Note:* Light green reported bars are related to previous fiscal year

**Updates to SR 520 Toll Bridge toll traffic and revenues**

The March 2025 SR 520 Bridge’s toll traffic and revenue annual forecasts are a no-change forecast as compared to the November 2024 forecasts.

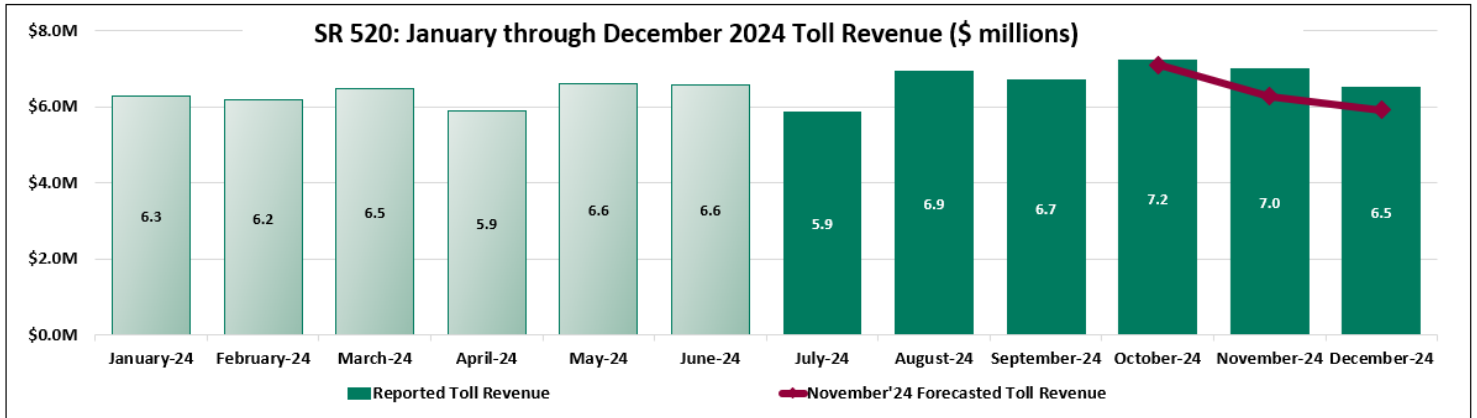
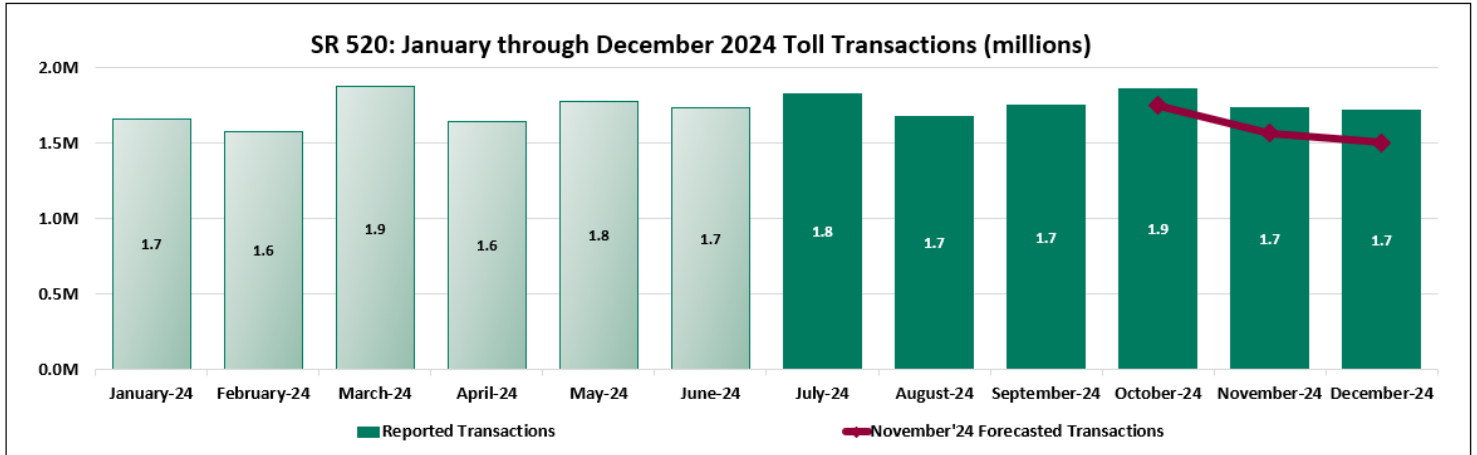
SR 520 three-month (October through December 2024) Toll Traffic is above the November 2024 Forecast by 10.3%, FY 2025 YTD Toll Traffic is above the forecast by 4.9%. Reported traffic through the early winter months has been more than forecasted. Monitoring of reported traffic for this toll facility currently influenced by roadway construction conditions will continue, and appropriate modifications may be made for future forecasts.

Toll Revenue is above the quarterly forecast by 7.4%, or \$1.4 million. FY 2025 YTD Toll Revenue is 3.7% above.

Figure 13 below provides 12-month Toll Transactions and Reported Toll Revenue performances in comparison to the November 2024 Forecast.

**Figure 13: SR 520 12-month Toll Traffic and Revenue actuals in comparison to November 2024 Forecasts**





Note: Light green reported bars are related to previous fiscal year

**Updates to I-405 Express Toll Lanes (ETLs) toll traffic and revenues**

The March 2025 I-405 ETLs’ toll traffic and revenue annual forecasts are a no-change forecast as compared to the November 2024 forecasts.

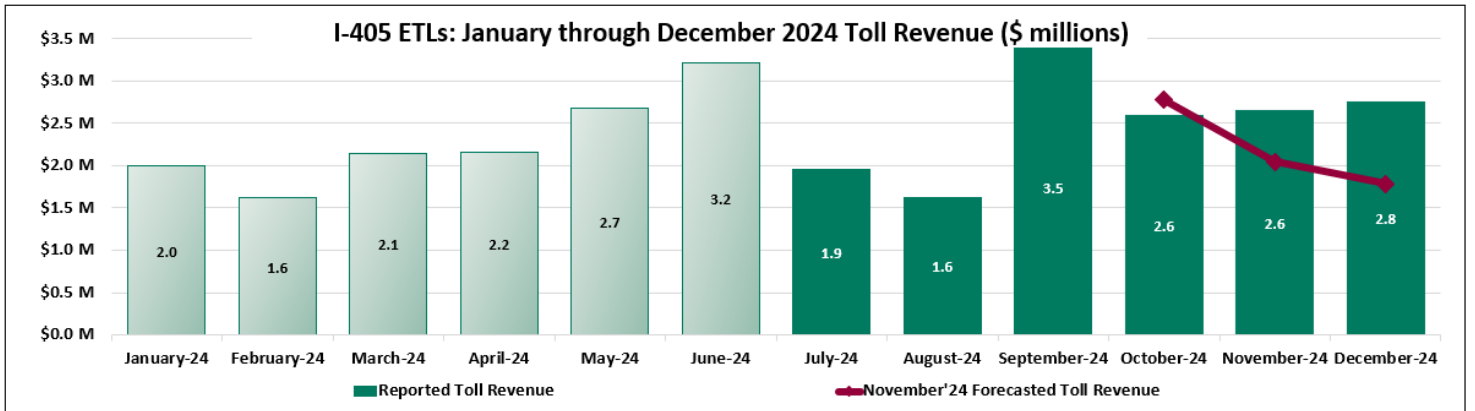
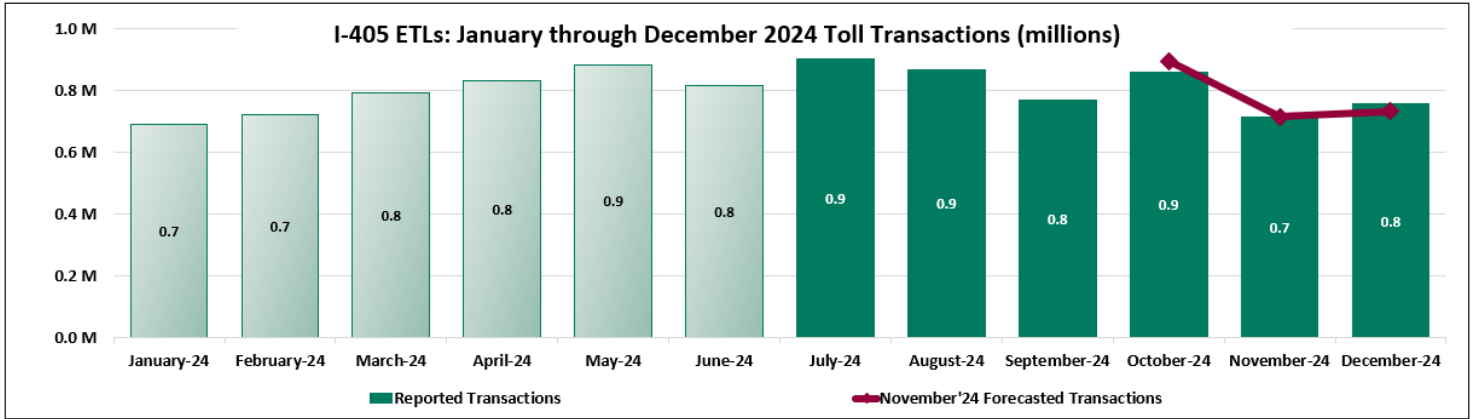
I-405 ETLs three-month (October through December 2024) Toll Traffic is below the November 2024 Forecast by 0.5%, FY 2025 YTD Toll Traffic is below by 0.2%.

Toll Revenue is above the quarterly forecast by 21.1%, or \$1.4 million. FY 2025 YTD Toll Revenue is 10.2% above.

As a note, I-405 ETLs FY 2024 Q2 and YTD reported toll traffic is aligned with the forecasted values; however, actual toll revenue performance is above the forecast, as average toll rates had been higher than forecasted during this period. Monitoring of the variability of the average toll rates of this dynamically-priced facility will continue, and appropriate modifications may be made for future forecasts.

Figure 14 below provides 12-month Toll Transactions and Reported Toll Revenue performances in comparison to the November 2024 Forecast.

**Figure 14: I-405 ETLs 12-month Toll Traffic and Revenue actuals in comparison to November 2024 Forecasts**



**Note:** Light green reported bars are related to previous fiscal year.  
 Max toll rates and hours of operations policy update effective March 1, 2024.

**Updates to SR 167 Express Toll Lanes (ETLs) toll traffic and revenues**

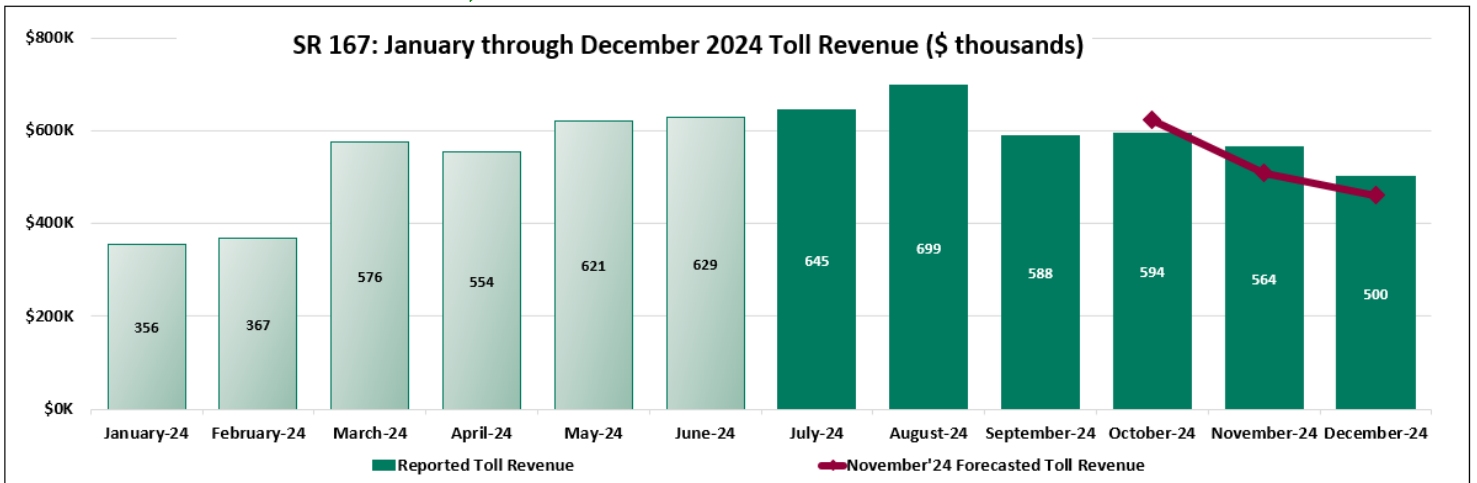
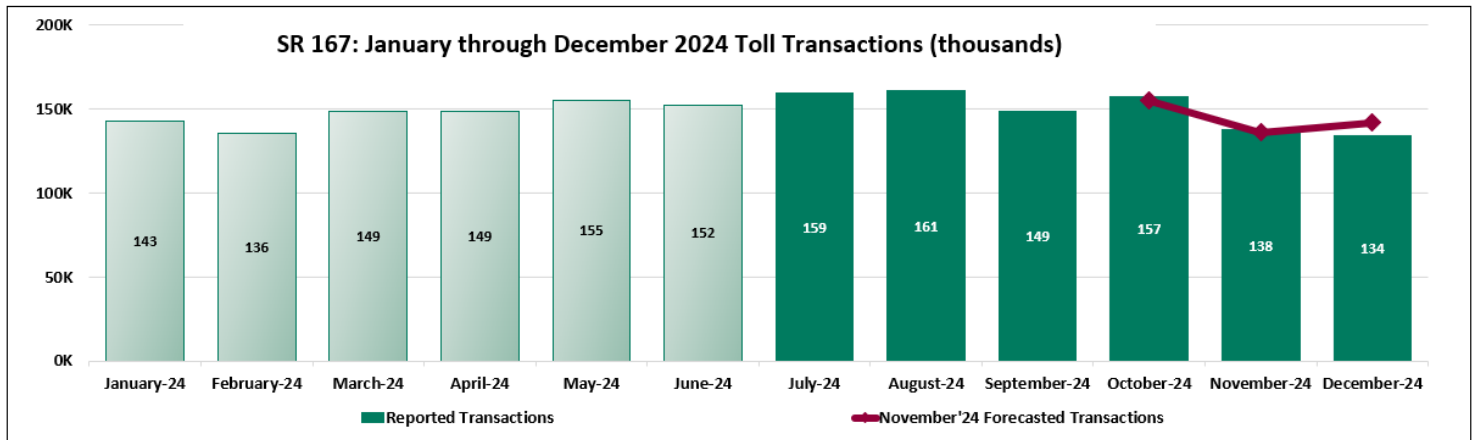
The March 2025 SR 167 ETLs’ toll traffic and revenue annual forecasts are a no-change forecast as compared to the November 2024 TERFC forecasts.

SR 167 ETLs three-month (October through December 2024) Toll Traffic is below the November 2024 Forecast by 0.8%, FY 2025 YTD Toll Traffic is below by 0.4%.

Toll Revenue is above the quarterly forecast by 4.2%, or \$67,000. FY 2025 YTD Toll Revenue is 1.9% above.

Figure 15 below provides 12-month Toll Transactions and Reported Toll Revenue performances in comparison to the November 2024 Forecast.

**Figure 15: SR 167 ETLs 12-month Toll Traffic and Revenue actuals in comparison to November 2024 Forecasts**



**Note:** Light green reported bars are related to previous fiscal year.  
 Max toll rates and hours of operations policy update effective March 1, 2024.

### Updates to SR 99 Tunnel toll traffic and revenues

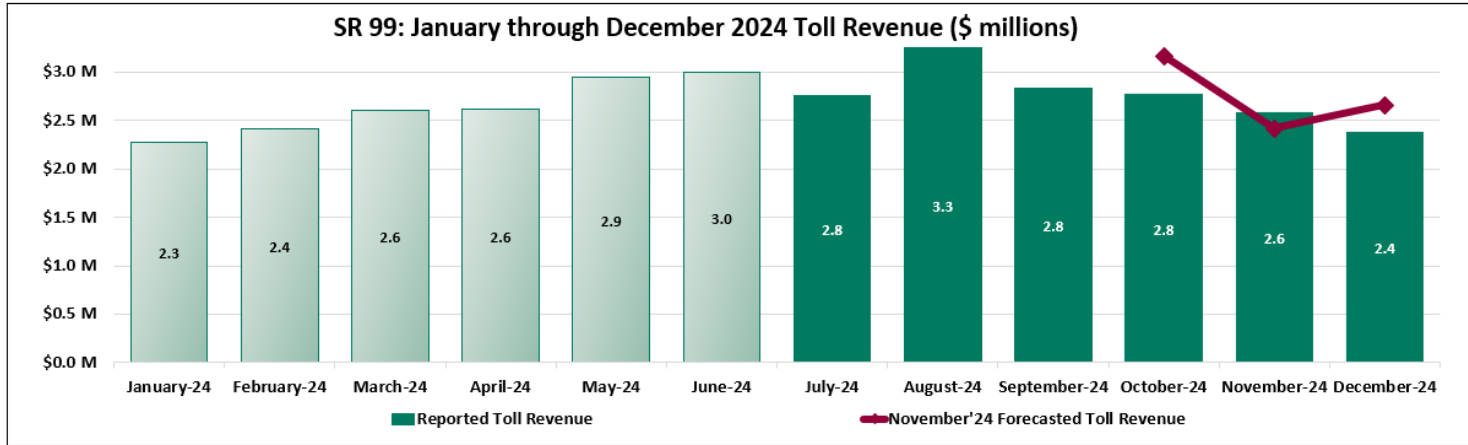
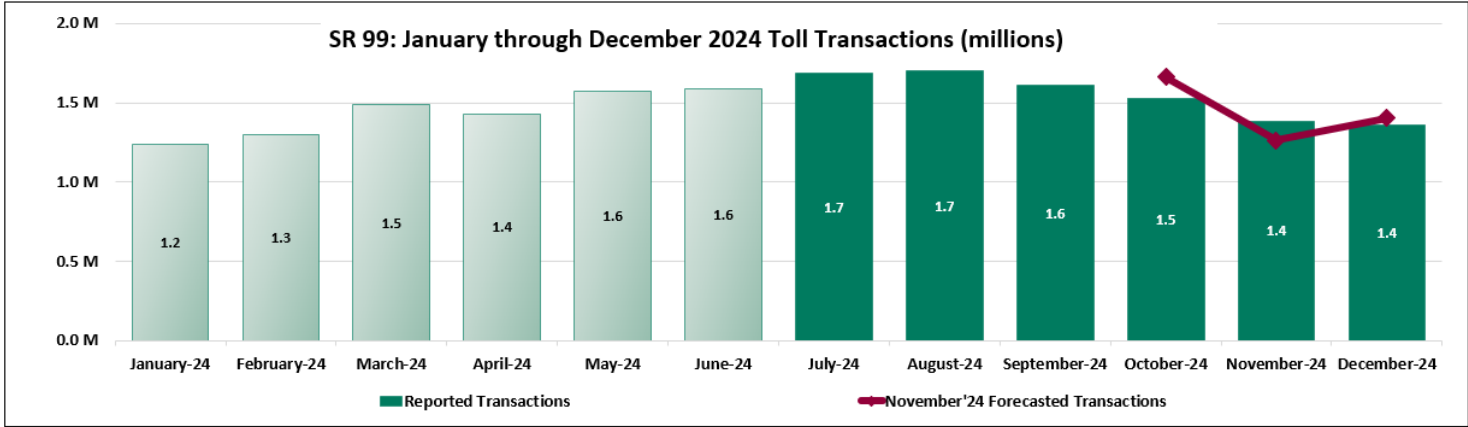
The March 2025 SR 99's toll traffic and revenue annual forecasts are a no-change forecast as compared to the November 2024 TERFC forecasts.

Toll Traffic is below the November 2024 Forecast by 1.3, FY 2025 YTD Toll Traffic is below by 0.6%.

Toll Revenue is below the quarterly forecast by 6.3%, or \$0.5 million. FY 2025 YTD Toll Revenue is 3.0% below. There were closures related to maintenance in October and a road race in December 2024 that were not included in the forecast and account for the differences in performance versus forecast. Reported average toll rates on this facility have been slightly below the forecasted values. Monitoring of the variability of the average toll rates of this variably-priced toll facility will continue to assess their trends, and appropriate modifications may be made for future forecasts.

Figure 16 below provides 12-month Toll Transactions and Reported Toll Revenue performances in comparison to the November 2024 Forecast.

**Figure 16: SR 99 12-month Toll Traffic and Revenue actuals in comparison to November 2024 Forecasts**



**Note:** Light green reported bars are related to previous fiscal year

## **Federal Funds Revenue**

### ***Overview***

After state funds, the largest source of transportation revenue is federal funds. The Federal Funds forecast contains the formula funds distributed by the Federal Highway Administration (FHWA) to Washington State Department of Transportation for highway purposes. Federal funds reported in this forecast are based on the federal fiscal year (FFY) which begins on October 1.

On November 15, 2021, President Biden signed the Infrastructure Investment and Jobs Act (IIJA), a \$1.2 trillion investment in transportation and other types of infrastructure (including energy, water, and broadband). Nationwide, this represents a \$550 billion increase in federal government spending above baseline funding levels. The foundation of the IIJA is a new five-year authorization of the federal Surface Transportation Program to replace the expired Fixing America's Surface Transportation (FAST) Act. The IIJA authorizes \$567 billion in spending authority for all transportation programs over five years, an increase of \$274 billion (more than 48%) above FAST Act baseline spending levels. In addition, the bill broadens eligibility criteria for many existing programs and establishes within the U.S. Department of Transportation (USDOT) alone at least two dozen new formula and discretionary (competitive) grant programs targeting key priorities, including but not limited to, resiliency, sustainability, equity, and safety.

### ***FHWA – Highways Forecast***

- The total highway apportionment for Washington state for FFY 2024 was \$1,368.3 million. This reflects actual apportionment distributions for FFY 2024.
- The March 2025 total apportionment forecast for FFY 2025 is based on FHWA Notices NN4510.892, N4510.893, N4510.894 and N4510.895. FFY 2026 assumes an annual growth rate of 2% which is consistent with the US funding levels set forth in the Infrastructure Investment and Jobs Act (IIJA). FFY 2027 thru FFY 2035 forecast of federal highway apportionment assumes revenue growth of 1%. The current total apportionment estimate for FFY 2025 is \$1,137.3 million.
- The baseline forecast for FFY 2027 thru FFY 2035 assume revenue growth of 1%.

### ***Obligation Authority (OA) Forecast***

- Obligation authority (OA) (a.k.a. obligation limitation) is the ceiling or total amount of commitments of federal apportionment that can be made within a year. Congress sets this ceiling or limit as part of the federal appropriation bills to control federal expenditures annually.
- The March 2025 CORE OA for FFY 2024 has been reconciled to actual OA distributions and is \$1,336.4 million which includes distributions for discretionary items, Other allocated programs as well as Ferry Boat/Terminals distributions.
- Total OA forecast for FFY 2025 and throughout the forecast horizon will be set at 98% of apportionment, which is consistent with historical Washington State OA distributions.
- The methodology used to split the formula OA distributions between the State Programs and the Local Programs was modified in the September 2018 forecast.

### ***Allocations of IIJA Funds Forecast:***

When new federal transportation authorization laws are enacted, Washington state has a tradition of convening a work group to make recommendations on future distributions of federal-aid highway formula program funding to state and local governments. The Work Group met three times in September and July 2022.

### **Summary of funding split decisions for the five-year IIJA authorization**

#### **National Highway Performance Program -**

- Retain similar splits as FAST Act which was also assumed in the Move Ahead Washington allocation— 87% state/13%, local.
- The local share is to be administered through the NHS Asset Management Program administered through the WSDOT Local Programs Office

#### **Surface Transportation Block Grant program –**

- Maintain FFY 2022 and FFY 2023 at the Move Ahead Washington identified split (28 state/72% local)
- For FFY 2024 – FFY 2026, the split is revised to 16% state/84% local to effectively provide the historic split of 21% state/79% local, over the course of the five years.

#### **Highway Safety Improvement Program –**

- No change from FAST Act distribution – continue to allocate funds based on updated crash data to support the Target Zero statewide safety plan – FFY 2022 data reflects split 30% state/70% local.

#### **Congestion Mitigation & Air Quality (CMAQ) Program –**

- No change from FAST Act – continue to allocate funds to the five eligible Metropolitan Planning Organizations to help meet the requirements of the federal Clean Air Act– 100% local.

#### **Bridge Replacement Program (NEW)**

- Maintain FFY 2022 and FFY 2023 at the Move Ahead Washington identified splits (85% state/15% local).
- For FFY 2024 – FFY 2026, the split is revised to 46% state/54% local to effectively provide an average split of 61% state/39% local, over the course of the five years.
- The local share is to be administered through the Local Bridge grant program administered by the WSDOT Local Programs Office
- The maximum funding cap for local bridges is raised to \$25M.
- Non-federal match for local off-system bridges will not be required by the state.

### **National Highway Freight Program –**

- Retain current splits (50% state/50% local) as identified in Move Ahead Washington to ensure that Washington’s Freight System Plan can be submitted to the Federal Highway Administration for approval by the federal October 2022 deadline.

### **Promoting Resilient Operations for Transformative, Efficient, and Cost-Saving Transportation Program (PROTECT) –**

- For FFY 2022 no change to Move Ahead Washington allocation (100% state).
- For FFY 2023-2026, \$25m set aside for tribal resiliency projects.  
Remaining \$75m shall be directed to local fish passage projects (over 4 years).  
The Brian Abbot Fish Barrier Removal Board shall facilitate the project selection process. The Board shall work with WSDOT Local Programs to ensure that project selection criteria are consistent with federal requirements.
- WSDOT Local Programs shall administer funding for all projects awarded PROTECT funds.

### **National Electric Vehicle Program –**

- New IIJA program – funds are provided 100% to the state.

### **Carbon Reduction Program -**

- New IIJA program funds are split 35% state/65% local.

### ***FHWA Penalties:***

The March 2025 federal forecast incorporates four FHWA penalties for current and prior years, which Washington State was subject to.

- The Section 164 Penalty – FHWA has determined that Washington State is not in compliance with section 164 of title 23, United States Code, the Minimum Penalties for Repeat Offenders for Driving While Intoxicated or Driving Under the Influence. This penalty amounts to 2.5% of the National Highway Performance Program and Surface Transportation Block Grant Program apportionments annually and WSDOT elects to withhold the entire amount from the National Highway Performance Program. These funds are reserved for release for use on eligible Highway Safety Improvement Program (HSIP) activities or transfer to the States’ 402 Safety Programs pending the outcome of the administrative and “general practice” certification review processes. Section 164 penalty funds are included as part of the Highway Safety Improvement Program totals.
- Safety Performance Penalty – FHWA has determined that Washington State has failed to meet or make significant progress towards meeting the safety performance targets established in Target Zero. This penalty requires the state to obligate an amount equal to a prior year’s apportionment of HSIP funds on HSIP projects.
- Vulnerable Road Users (VRU) - Applies when the total annual fatalities of a non-motorist as defined in 23 U.S.C.148(a)(15) represents not less than 15% of the annual crash fatalities. The penalty requires that in the following fiscal year, the state obligate not less than 15% of the funds apportioned for the Highway Safety

Improvement Program for Highway Safety projects to address the safety of vulnerable users as defined above.

- High Risk Rural Roads (HRRR) – This penalty applies to all states where the fatality rate on rural roads increases over the most recent 2-year period for which data is available. This penalty requires the State to obligate an amount equal to at least 200 percent of its FY 2009 high risk rural roads set-aside for high-risk rural roads, as defined in their State Strategic Highway Safety Plan.

#### **COVID 19 Stimulus Funds:**

**The Coronavirus Aid, Relief, and Economic Security (CARES) Act** (P.L. 116-136) created a Coronavirus Relief Fund (CRF) which provides \$150 billion to state, local, territorial, and tribal governments. The CRF provides \$150 billion for expenditures incurred due to the COVID-19 public health emergency. The November, November and September 2021 federal apportionment forecasts include an estimated CRF distribution to Washington State for ferries and public transportation. This CRF estimate does not include fund distributions made directly to King, Pierce, Snohomish, and Spokane counties.

The Coronavirus Response and Relief Supplemental Appropriations Act of 2021 (CRRSAA) was signed by President Trump on December 27, 2020, making consolidated appropriations for the fiscal year ending November 30, 2021, providing coronavirus emergency response and relief. This act made modifications to existing COVID-19 relief legislation and provided additional appropriations for the expenditure of federal COVID-19 pandemic relief funds. The November and September 2021 Forecasts include funds made available to WSDOT through this CRRSAA Act of \$168 million. There will be no impact on forecasts beyond 2025.

**The America Rescue Plan Act of 2021 (ARPA) was signed into law by President Biden on March 11, 2021.** The ARPA provides an estimated \$1.9 trillion in stimulus to aid in the COVID-19 pandemic. This February 2022 Federal Highway forecast includes \$400 Million in ARPA funds intended for Fish Barrier projects. The February 2022 federal highway forecast will include \$400 million of ARPA funds that is for Fish Barrier projects. There will be no impact on forecasts beyond 2025.



## **FTA - Public Transportation Federal Funds**

### *Overview*

In addition to the FHWA formula and non-formula programs governed by the Infrastructure Investment and Jobs Act (IIJA), the Federal Transit Administration also provides program allocations to Washington for a variety of transit projects. The IIJA authorize \$91.2 billion for FFY 2022-2026 for public transportation programs nationwide.

WSDOT each quarter forecasts the federal funds for public transportation programs. The March 2025 Public Transportation federal funds forecast reflects actual apportionments for FY 2022 through FY 2024. The numbers do not include CARES, CRRSAA, and ARPA funds that were received in FY 2020, and FY2021. The updated apportionment totals reflect increased funding levels provided under the IIJA for those years. An annual growth rate of 2% is assumed for FY 2026, and a 1% annual growth rate assumed for FY 2027 through FY 2035. For the 2023-25 Biennium, WSDOT received \$30.1 million in FY 2024 FTA apportionments with \$30.7 million anticipated for FY 2025. For the next 2025-27 Biennium, \$63.2 million is anticipated in new apportionments.

## ***FTA – Washington State Ferries (WSF) Federal Funds***

WSF receives significant federal assistance through the public transportation program administered by the Department of Transportation's Federal Transit Administration (FTA). The federal public transportation program is authorized from FFY 2022 through FFY 2026 as part of the IIJA which was signed into law on November 15, 2021.

### ***WSF Federal Apportionment Funds Forecast***

Washington State's level of FTA apportionment for FFY 2024 is distributed among regional transit agencies based on the most recent Puget Sound Regional Council (PSRC) split letter. This letter shows the amount of formula funding received by each eligible recipient, including WSF. The March 2025 WSF federal forecast reflects the current split letter released by PSRC for FFY 2024. This now includes a formula allocation of the new PSRC Equity Set-aside. PSRC has prepared a forecast for FFYs 2025 – 2028. The forecasts for FFYs 2029-36 are based on the PSRC forecast for FFY 2028 and an annual growth rate of one percent which is consistent with the assumption of funding level increases used by WSDOT.

The IIJA has significantly changed WSF's apportionment of FTA formula funds. The distribution to WSF increased from \$13.2 million in FFY 2021 to \$21.1 million in FFY 2024. The forecast continues to increase through FFY 2026. Beginning in FFY 2027 the PSRC forecast declines to pre-IIJA levels and holds steady for 2027 and 2028 forecasts. Beyond FFY 2028 WSF has assumed a growth rate of one percent per year. WSF's annual funding from this source is projected to increase each year beyond 2028 reaching \$21.1 million in FFY 2036.

The FTA formula funds forecast is based on PSRC's annual split level. As a result, there is not change from the November 2024 forecast to the March 2025 forecast.

## APPENDIX

**2022 Transportation Packet (ESSB 5974)  
New/Incremental Revenues by Fee Type  
March 2025 vs. June 2022 forecast**

**ESSB 5974 Transportation Resources Bill (2022) Revenue Impact Summary**

Move Ahead WA (26P) by Fee	2023-2025			2025-2027			10-Year-Period (23-33)		
	March 2025	June 2022	Change	March 2025	June 2022	Change	March 2025	June 2022	Change
Plate original from \$10 to \$50 *Includes Motorcycle Plates	95.06	117.56	-19.1%	3.38	115.40	-97.1%	491.70	573.43	-14.3%
Plate replacement from \$10 to \$30 *Includes Motorcycle Plates	56.60	66.32	-14.7%	57.37	65.98	-13.1%	283.98	328.09	-13.4%
Dealer Temp from \$15 to \$40	30.73	41.13	-25.3%	38.36	39.99	-4.1%	184.48	197.99	-6.8%
License fee for trucks from \$0.00 to \$0.50*	1.54	1.88	-18.2%	1.82	1.94	-5.9%	9.08	9.83	-7.6%
License Plate Tech fee for trucks from \$0.00 to \$0.25*	0.77	0.94	-18.2%	0.91	0.97	-5.9%	4.54	4.91	-7.6%
Stolen Vehicle Fee from \$15 to \$35**	25.59	32.59	-21.5%	28.93	46.00	-37.1%	149.16	259.57	-42.5%
<b>Move Ahead WA (26P)</b>	<b>210.28</b>	<b>260.42</b>	<b>-19.3%</b>	<b>227.59</b>	<b>270.28</b>	<b>-15.8%</b>	<b>1,122.94</b>	<b>1,373.81</b>	<b>-18.3%</b>
Move Ahead WA Flexible (26Q) by Fee	2023-2025			2025-2027			10 Year Total		
	March 2025	June 2022	Change	March 2025	June 2022	Change	March 2025	June 2022	Change
EDL/EID from \$4 to \$7 per year	16.91	20.26	-16.6%	21.69	23.07	-6.0%	96.97	102.07	-5.0%
ADR from \$13 to \$17 and \$19 in FY30	9.16	9.40	-2.6%	9.43	9.64	-2.2%	67.16	68.54	-2.0%
DL/ID replacement from \$10 to \$20	4.19	3.98	5.2%	4.27	4.04	5.7%	21.54	20.45	5.3%
<b>Move Ahead WA Flexible (26Q)</b>	<b>30.26</b>	<b>33.65</b>	<b>-10.1%</b>	<b>35.39</b>	<b>36.76</b>	<b>-3.7%</b>	<b>185.09</b>	<b>190.92</b>	<b>-3.1%</b>
Aviation Fuel Tax (Fund 039)	2023-2025			2025-2027			10 Year Total		
	March 2025	June 2022	Change	March 2025	June 2022	Change	March 2025	June 2022	Change
Aviation fuel tax from \$.11 to \$.18 per gallon	5.12	3.34	53.2%	4.88	3.38	44.7%	24.46	17.05	43.4%
<b>Net Revenue from ESSB 5974</b>	<b>245.66</b>	<b>297.41</b>	<b>-17.4%</b>	<b>267.86</b>	<b>310.41</b>	<b>-13.7%</b>	<b>1,332.49</b>	<b>1,581.79</b>	<b>-15.8%</b>

\* Included technical cleanup bill ESHB 1853 (2023) resulted in all trucks being a subject to DOL service fee (\$0.50) and License plate technology fee (\$0.25)

\*\*Stolen Vehicle Check Fee from \$15 to \$50 and from \$50 to \$75 in FY2027 (26P fund, forecasted by WADOT)

## **Forecast Contacts**

### **Economic Variables and Fuel Price Forecast**

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### **Motor Fuel Tax Revenue Forecast**

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### **Motor Vehicle Licenses, Permits & Fees Revenue Forecast**

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### **Driver Related Revenue Forecasts**

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Wenjun Wu, Ph.D., Washington State Department of Licensing, 360-634-5108, [wenjun.wu@dol.wa.gov](mailto:wenjun.wu@dol.wa.gov)

### **Other Transportation Related Revenue Forecast**

#### *Vehicle Sales, Rental Car Tax and Heavy Equipment Rental Tax*

Tyler Humphries, Economic & Revenue Forecast Council - 360-534-1560 [tylerh3@dor.wa.gov](mailto:tylerh3@dor.wa.gov)

#### *Studded Tire Fee*

Luis Hillon, Economic & Revenue Forecast Council - 360-534-1560 [luish@dor.wa.gov](mailto:luish@dor.wa.gov)

#### *HOV Penalties and Hazardous Substance Tax*

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#### *Business and Other Revenue*

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*Aeronautics Revenue*

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**Washington State Ferries Ridership and Revenue Forecast**

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**Toll Operations Traffic and Revenue**

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