

**Transportation Revenue  
Forecast Council  
June 2018  
Transportation Economic and  
Revenue Forecasts  
Volume III: Alternate Forecast Tables**

# **Transportation Revenue Forecast Council**

## **Alternative Forecasts**

### **June 2018**

- Alternate Ferry Forecast.....III-3
- Alternate Enhanced Driver's License .....III-10

**REVENUE AND RIDERSHIP PROJECTIONS**  
**JUNE 2018 FORECAST**  
**FISCAL YEARS 2018-2029**

Prepared for  
**Washington State Ferries**

for Presentation to the  
**Transportation Revenue  
Forecast Council**

June 18, 2018 Meeting

Prepared by  
WSP USA

June 15, 2018

# Washington State Ferries

## June 2018 Revenue and Ridership Forecasts — Fiscal Years 2018-2029

### JUNE 2018 FORECAST NOTES

The fare revenue and ridership forecasts for Washington State Ferries (WSF) are completed in four stages. First, monthly ridership projections by seven fare categories are prepared for each route using time series analysis methods, with a forecast horizon from the present 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 full fares, (5) auto commuter discount fares, (6) other discount vehicles, and (7) oversize vehicle fares.

Stage two of the process generates system-wide ridership projections. Econometric models combine ferry fare scenarios with demographic and economic projections to produce system-wide unconstrained ridership forecasts by seven fare categories through FY 2029. Within each fare category, the individual route forecasts are then calibrated to match the system-wide forecast totals from the econometric models.

The third stage of the process consists of adjusting the calibrated passenger and vehicle ridership by route to reflect seasonal vehicle capacity constraints, changes in service hours, and/or the net impacts from adding or eliminating service.

Last, the appropriate fares and average fare realizations are applied to the calibrated, capacity-constrained ridership forecasts for each route by fare category. This yields monthly and annual revenue forecasts by route for seven fare categories.

In August 2017, the Washington State Transportation Commission adopted annual fare increases that took effect on October 1, 2017 (FY 2018) and 2018 (FY 2019), effectively changing the fare assumptions for the Baseline and Alternative 1 Forecasts, starting with the September 2017 Forecast.

- **Baseline Forecast** – Includes nickel-rounded fare increases in FY 2018 of 2.1% for passengers, 2.9% for non-oversize vehicles, and an average of 1.6% on oversize vehicles, effective October 1, 2017. FY 2019 increases of 2.1%, 2.5% and 0.0%, respectively, are set to follow on October 1, 2018. With no further fare increases, real fares will decline from FY 2020 forward.
- **Alternative 1 Forecast** – Builds on the Baseline Forecast by adding consecutive 2.5% increases each October, from 2019 through 2028 (FY 2020-29), resulting in slightly increasing real fares under current inflation projections.

The FY 2018 projections have been updated to include actual ridership and revenue through May 2018.

Adopted

### Ridership Impacts

- The June 2018 Forecast for ridership incorporates the latest updated demographic and economic variable projections provided by the State.
- Revisions to the real personal income projections are mixed in the near-term but generally very slightly lower over the forecast horizon, with correspondingly small, almost immaterial impacts on ridership.
- Retail employment projections have been revised slightly higher, trade, transportation and utilities employment projections are essentially unchanged, and overall non-agricultural employment has been revised very slightly lower. The effects on ridership are mixed, with a slightly negative overall impact.
- Small upward revisions to projected inflation yield slightly lower real fares over time, which tends to put upward pressure on the ridership forecasts.
- Real gasoline price projections have been revised upward through FY 2020 dampening near term vehicle ridership. However, real prices are then 3% by FY 2021, with the spread widening to 15% lower by FY 2023 for the rest of the forecast horizon. This increases vehicle/driver ridership demand.
- Ridership for February through May 2018 came in 1.4% lower than projected in February, resulting in a 0.5% drop in the overall FY 2018 forecast. For the 11 months fiscal year-to-date, the overall ridership forecast is virtually the same as in the March 2017 Forecast, though commuter fare ridership is notably lower.
- Overall, the ridership forecasts for FY 2018 are 0.5% lower, and FY 2019, unchanged, compared with the February Baseline and Alternative 1 Forecasts.

### Revenue Impacts

- With 11 months of actual data, revenue for FY 2018 is 0.5% lower than forecasted in February. For the same 11-month period fiscal year-to-date, actual revenues are 1.7% higher than the March 2017 Forecast used for budgeting.
- The 2017/19 biennium forecast of \$391.2 M is 2.4 M (0.6%) lower than the February Baseline and Alternative 1 Forecasts, with \$383.0 M in base fares for the operating account and \$8.3 M in surcharge revenue for the capital account.
- For the 2019/21 biennium, forecasted revenues of \$408.3 M under the Baseline Forecast are \$1.3 M (0.3%) lower than projected in February. For the Alternative 1 Forecast, revenues of \$417.8 M are \$1.2 M (0.3%) lower.
- Thereafter, the biennial revenue for the Baseline and Alternative 1 Forecasts range from essentially unchanged to 0.2% lower than projected in February.

# Washington State Ferries

## REVENUE PROJECTIONS ~ BASELINE FORECAST

Adopted Fares through October 1, 2018 | No Changes in Fares after FY 2019<sup>1</sup>

June 2018 Forecast – Fiscal Years 2018-2029

Fiscal Year	June 2018 Capacity-Constrained Revenue Forecast	Fiscal Year Annual Growth Rate	June Biennium Total	June vs. February Forecast			February 2018 Baseline	
				% Change by Fiscal Year	\$ Change and % Change by Biennium		Capacity-Constrained Revenue Forecast	Biennium Total
2010	\$147,009,545	1.7%						
2011	\$147,447,850	0.3%	\$294,457,395					
2012	\$155,085,373	5.2%						
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 <sup>2</sup>	\$192,421,000	2.9%		(0.5%)			\$193,293,000	
2019	\$198,821,000	3.3%	\$391,242,000	(0.8%)	(\$2,384,000)	(0.6%)	\$200,333,000	\$393,626,000
2020	\$202,902,000	2.1%		(0.4%)			\$203,814,000	
2021	\$205,385,000	1.2%	\$408,287,000	(0.2%)	(\$1,328,000)	(0.3%)	\$205,801,000	\$409,615,000
2022	\$207,946,000	1.2%		(0.1%)			\$208,078,000	
2023	\$210,493,000	1.2%	\$418,439,000	0.0%	(\$66,000)	(0.0%)	\$210,427,000	\$418,505,000
2024	\$212,888,000	1.1%		0.1%			\$212,779,000	
2025	\$215,294,000	1.1%	\$428,182,000	0.0%	\$212,000	0.0%	\$215,191,000	\$427,970,000
2026	\$217,487,000	1.0%		(0.0%)			\$217,510,000	
2027	\$219,376,000	0.9%	\$436,863,000	(0.1%)	(\$298,000)	(0.1%)	\$219,651,000	\$437,161,000
2028	\$221,078,000	0.8%		(0.2%)			\$221,457,000	
2029	\$222,748,000	0.8%	\$443,826,000	(0.2%)	(\$885,000)	(0.2%)	\$223,254,000	\$444,711,000

<sup>1</sup> The Baseline Forecast includes 2.1% passenger and 2.9% vehicle fare increases on October 1, 2017, followed by 2.1% and 2.5% increases, respectively, on October 1, 2018 (FY 2019), plus the 25¢ surcharge per fare sold for funding capital expenditures. The Baseline Forecast excludes any further changes to the nominal fares after October 2018, resulting in declining real fares thereafter. The Baseline Forecast also reflects the current programmed level of service subject to capacity constraints.

<sup>2</sup> FY 2018 includes actual revenue data through May 2018.

# Washington State Ferries

## REVENUE PROJECTIONS ~ BASELINE FORECAST

Adopted Fares through October 1, 2018 | No Changes in Fares after FY 2019<sup>1</sup>

June 2018 Forecast – Fiscal Years 2018-2029

Fiscal Year	June 2018 Capacity-Constrained Revenue Forecast	Fiscal Year Annual Growth Rate	June Biennium Total	Distribution of Revenue to Operating and Capital Programs			
				25¢ Surcharge Revenue for Capital Program	Capital Biennium Total	Base Fare Revenue for Operating Program	Operating Biennium Total
2010	\$147,009,545	1.7%				\$147,009,545	
2011	\$147,447,850	0.3%	\$294,457,395			\$147,447,850	\$294,457,395
2012	\$155,085,373	5.2%		\$2,544,970		\$152,540,403	
2013	\$162,047,033	4.5%	\$317,132,406	\$3,626,191	\$6,171,161	\$158,420,842	\$310,961,245
2014	\$167,441,867	3.3%		\$3,662,690		\$163,779,177	
2015	\$175,965,750	5.1%	\$343,407,617	\$3,894,088	\$7,556,778	\$172,071,662	\$335,850,839
2016	\$181,444,863	3.1%		\$4,007,848		\$177,437,015	
2017	\$186,973,746	3.0%	\$368,418,609	\$4,022,681	\$8,030,529	\$182,951,065	\$360,388,080
2018 <sup>2</sup>	\$192,421,000	2.9%		\$4,101,000		\$188,320,000	
2019	\$198,821,000	3.3%	\$391,242,000	\$4,152,000	\$8,253,000	\$194,669,000	\$382,989,000
2020	\$202,902,000	2.1%		\$4,206,000		\$198,696,000	
2021	\$205,385,000	1.2%	\$408,287,000	\$4,263,000	\$8,469,000	\$201,122,000	\$399,818,000
2022	\$207,946,000	1.2%		\$4,321,000		\$203,625,000	
2023	\$210,493,000	1.2%	\$418,439,000	\$4,382,000	\$8,703,000	\$206,111,000	\$409,736,000
2024	\$212,888,000	1.1%		\$4,440,000		\$208,448,000	
2025	\$215,294,000	1.1%	\$428,182,000	\$4,496,000	\$8,936,000	\$210,798,000	\$419,246,000
2026	\$217,487,000	1.0%		\$4,548,000		\$212,939,000	
2027	\$219,376,000	0.9%	\$436,863,000	\$4,595,000	\$9,143,000	\$214,781,000	\$427,720,000
2028	\$221,078,000	0.8%		\$4,641,000		\$216,437,000	
2029	\$222,748,000	0.8%	\$443,826,000	\$4,686,000	\$9,327,000	\$218,062,000	\$434,499,000

<sup>1</sup> The Baseline Forecast includes 2.1% passenger and 2.9% vehicle fare increases on October 1, 2017, followed by 2.1% and 2.5% increases, respectively, on October 1, 2018 (FY 2019), plus the 25¢ surcharge per fare sold for funding capital expenditures. The Baseline Forecast excludes any further changes to the nominal fares after October 2018, resulting in declining real fares thereafter. The Baseline Forecast also reflects the current programmed level of service subject to capacity constraints.

<sup>2</sup> FY 2018 includes actual revenue data through May 2018.

# Washington State Ferries

## REVENUE PROJECTIONS ~ ALTERNATIVE 1 FORECAST

Adopted Fares through October 1, 2018 | 2.5% Annual Fare Increases FY 2020-29<sup>1</sup>

June 2018 Forecast – Fiscal Years 2018-2029

Fiscal Year	June 2018 Capacity-Constrained Revenue Forecast	Fiscal Year Annual Growth Rate	June Biennium Total	June vs. February Forecast			February 2018 Alternative 1	
				% Change by Fiscal Year	\$ Change and % Change by Biennium		Capacity-Constrained Revenue Forecast	Biennium Total
2010	\$147,009,545	1.7%						
2011	\$147,447,850	0.3%	\$294,457,395					
2012	\$155,085,373	5.2%						
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 <sup>2</sup>	\$192,421,000	2.9%		(0.5%)			\$193,293,000	
2019	\$198,821,000	3.3%	\$391,242,000	(0.8%)	(\$2,384,000)	(0.6%)	\$200,333,000	\$393,626,000
2020	\$205,715,000	3.5%		(0.4%)			\$206,636,000	
2021	\$212,090,000	3.1%	\$417,805,000	(0.1%)	(\$1,206,000)	(0.3%)	\$212,375,000	\$419,011,000
2022	\$218,347,000	3.0%		(0.0%)			\$218,349,000	
2023	\$225,023,000	3.1%	\$443,370,000	0.1%	\$201,000	0.0%	\$224,820,000	\$443,169,000
2024	\$231,773,000	3.0%		0.1%			\$231,477,000	
2025	\$238,913,000	3.1%	\$470,686,000	0.1%	\$649,000	0.1%	\$238,560,000	\$470,037,000
2026	\$246,165,000	3.0%		0.1%			\$245,976,000	
2027	\$253,562,000	3.0%	\$499,727,000	(0.0%)	\$169,000	0.0%	\$253,582,000	\$499,558,000
2028	\$260,899,000	2.9%		(0.0%)			\$260,996,000	
2029	\$268,302,000	2.8%	\$529,201,000	(0.0%)	(\$208,000)	(0.0%)	\$268,413,000	\$529,409,000

<sup>1</sup> The Alternative 1 Forecast includes 2.1% passenger and 2.9% vehicle fare increases on October 1, 2017, 2.1% and 2.5% increases, respectively, on October 1, 2018 (FY 2019), followed by 2.5% annual fare increases each October thereafter, and include the 25¢ surcharge per fare sold for funding capital expenditures. Projected annual inflation is less than the 2.5%, leading to slightly increasing real fares over the forecast horizon. The Alternative 1 Forecast also reflects the current programmed level of service subject to capacity constraints.

<sup>2</sup> FY 2018 includes actual revenue data through May 2018.

# Washington State Ferries

## REVENUE PROJECTIONS ~ ALTERNATIVE 1 FORECAST

Adopted Fares through October 1, 2018 | 2.5% Annual Fare Increases FY 2020-29<sup>1</sup>

June 2018 Forecast – Fiscal Years 2018-2029

Fiscal Year	June 2018 Capacity-Constrained Revenue Forecast	Fiscal Year Annual Growth Rate	June Biennium Total	Distribution of Revenue to Operating and Capital Programs			
				25¢ Surcharge Revenue for Capital Program	Capital Biennium Total	Base Fare Revenue for Operating Program	Operating Biennium Total
2010	\$147,009,545	1.7%				\$147,009,545	
2011	\$147,447,850	0.3%	\$294,457,395			\$147,447,850	\$294,457,395
2012	\$155,085,373	5.2%		\$2,544,970		\$152,540,403	
2013	\$162,047,033	4.5%	\$317,132,406	\$3,626,191	\$6,171,161	\$158,420,842	\$310,961,245
2014	\$167,441,867	3.3%		\$3,662,690		\$163,779,177	
2015	\$175,965,750	5.1%	\$343,407,617	\$3,894,088	\$7,556,778	\$172,071,662	\$335,850,839
2016	\$181,444,863	3.1%		\$4,007,848		\$177,437,015	
2017	\$186,973,746	3.0%	\$368,418,609	\$4,022,681	\$8,030,529	\$182,951,065	\$360,388,080
2018 <sup>2</sup>	\$192,421,000	2.9%		\$4,101,000		\$188,320,000	
2019	\$198,821,000	3.3%	\$391,242,000	\$4,152,000	\$8,253,000	\$194,669,000	\$382,989,000
2020	\$205,715,000	3.5%		\$4,191,000		\$201,524,000	
2021	\$212,090,000	3.1%	\$417,805,000	\$4,220,000	\$8,411,000	\$207,870,000	\$409,394,000
2022	\$218,347,000	3.0%		\$4,246,000		\$214,101,000	
2023	\$225,023,000	3.1%	\$443,370,000	\$4,279,000	\$8,525,000	\$220,744,000	\$434,845,000
2024	\$231,773,000	3.0%		\$4,309,000		\$227,464,000	
2025	\$238,913,000	3.1%	\$470,686,000	\$4,337,000	\$8,646,000	\$234,576,000	\$462,040,000
2026	\$246,165,000	3.0%		\$4,364,000		\$241,801,000	
2027	\$253,562,000	3.0%	\$499,727,000	\$4,392,000	\$8,756,000	\$249,170,000	\$490,971,000
2028	\$260,899,000	2.9%		\$4,417,000		\$256,482,000	
2029	\$268,302,000	2.8%	\$529,201,000	\$4,444,000	\$8,861,000	\$263,858,000	\$520,340,000

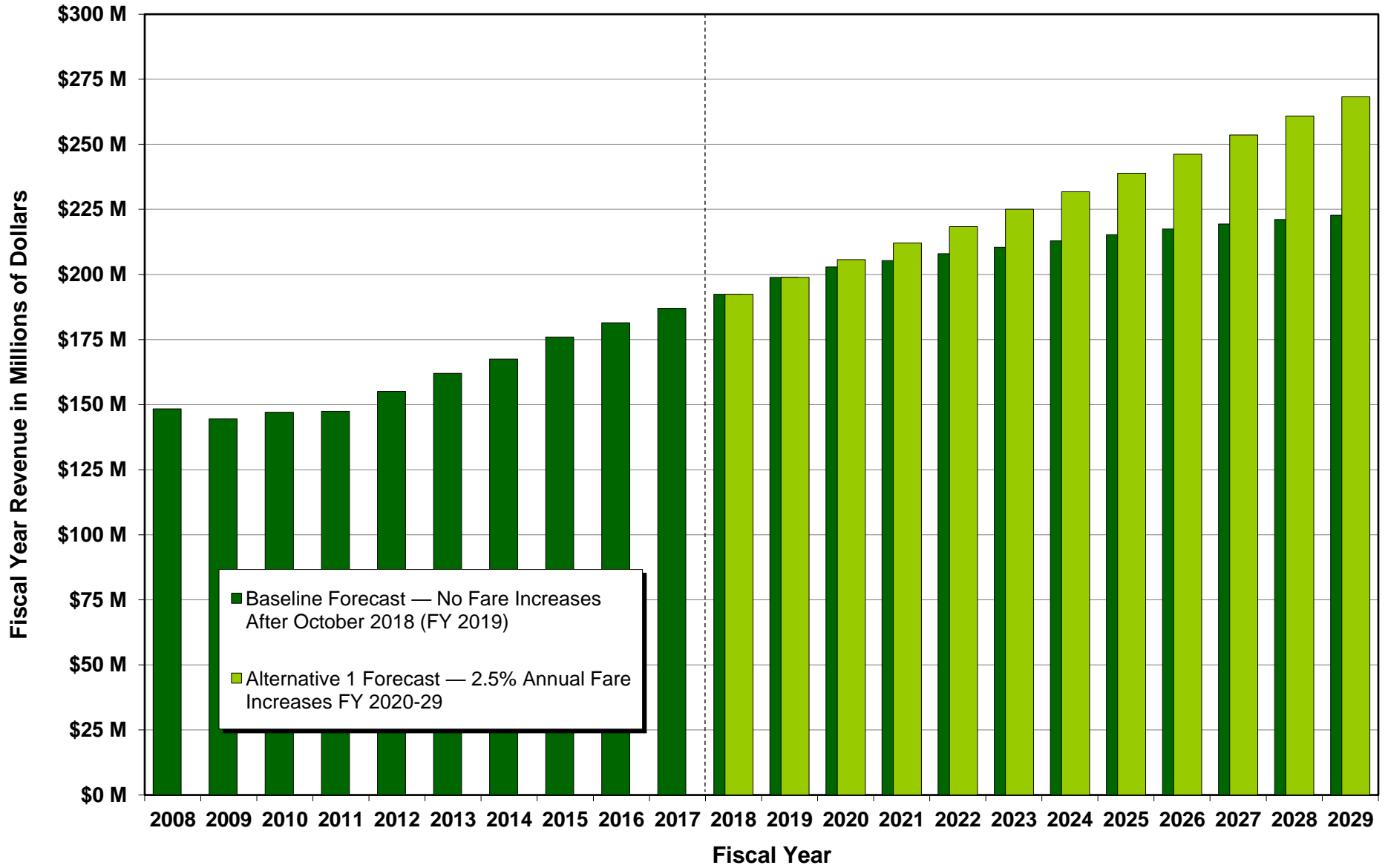
<sup>1</sup> The Alternative 1 Forecast includes 2.1% passenger and 2.9% vehicle fare increases on October 1, 2017, 2.1% and 2.5% increases, respectively, on October 1, 2018 (FY 2019), followed by 2.5% annual fare increases each October thereafter, and include the 25¢ surcharge per fare sold for funding capital expenditures. Projected annual inflation is less than the 2.5%, leading to slightly increasing real fares over the forecast horizon. The Alternative 1 Forecast also reflects the current programmed level of service subject to capacity constraints.

<sup>2</sup> FY 2018 includes actual revenue data through May 2018.



# Washington State Ferries — Revenue History and Forecast Trends

June 2018 Forecast – Fiscal Years 2008-2029



# Washington State Ferries

## RIDERSHIP PROJECTIONS ~ BASELINE FORECAST

Adopted Fares through October 1, 2018 | No Changes in Fares after FY 2019<sup>1</sup>

June 2018 Forecast – Fiscal Years 2018-2029

Fiscal Year	June 2018 Unconstrained Demand Forecast*	June 2018 Capacity Constrained Projections			February 2018 Projections		
		Passenger Ridership	Vehicle/Driver Ridership	Total Ridership	Annual Rate of Growth	Total Ridership	Jun. % Chg from Feb.
2010		12,463,027	10,169,074	22,632,101	(0.3%)		
2011		12,242,320	9,968,973	22,211,293	(1.9%)		
2012		12,236,081	9,983,059	22,219,140	0.0%		
2013		12,350,126	10,045,043	22,395,169	0.8%		
2014		12,696,936	10,154,905	22,851,841	2.0%		
2015		13,270,874	10,387,368	23,658,242	3.5%		
2016		13,523,385	10,559,240	24,082,625	1.8%		
2017		13,669,834	10,544,735	24,214,569	0.5%		
2018 <sup>2</sup>	24,571,000	13,848,000	10,691,000	24,539,000	1.3%	24,655,000	(0.5%)
2019	24,951,000	14,110,000	10,841,000	24,951,000	1.7%	24,946,000	0.0%
2020	25,243,000	14,205,000	11,035,000	25,240,000	1.2%	25,223,000	0.1%
2021	25,627,000	14,413,000	11,182,000	25,595,000	1.4%	25,566,000	0.1%
2022	26,038,000	14,650,000	11,317,000	25,967,000	1.5%	25,927,000	0.2%
2023	26,468,000	14,901,000	11,453,000	26,354,000	1.5%	26,300,000	0.2%
2024	26,892,000	15,157,000	11,574,000	26,731,000	1.4%	26,676,000	0.2%
2025	27,314,000	15,404,000	11,693,000	27,097,000	1.4%	27,048,000	0.2%
2026	27,743,000	15,662,000	11,794,000	27,456,000	1.3%	27,423,000	0.1%
2027	28,182,000	15,928,000	11,870,000	27,798,000	1.2%	27,800,000	(0.0%)
2028	28,628,000	16,199,000	11,934,000	28,133,000	1.2%	28,154,000	(0.1%)
2029	29,086,000	16,477,000	11,995,000	28,472,000	1.2%	28,510,000	(0.1%)

<sup>1</sup> The Baseline Forecast includes 2.1% passenger and 2.9% vehicle fare increases on October 1, 2017, followed by 2.1% and 2.5% increases, respectively, on October 1, 2018 (FY 2019), plus the 25¢ surcharge per fare sold for funding capital expenditures. The Baseline Forecast excludes any further changes to the nominal fares after October 2018, resulting in declining real fares thereafter. The Baseline Forecast also reflects the current programmed level of service subject to capacity constraints.

<sup>2</sup> FY 2018 includes actual ridership data through May 2018.

\* Excludes adjustments for vessel capacity constraints, 25¢ per fare capital surcharge impacts, and fiscal year-to-date actual data.

# Washington State Ferries

## RIDERSHIP PROJECTIONS ~ ALTERNATIVE 1 FORECAST

Adopted Fares through October 1, 2018 | 2.5% Annual Fare Increases FY 2020-29<sup>1</sup>

June 2018 Forecast – Fiscal Years 2018-2029

Fiscal Year	June 2018 Unconstrained Demand Forecast*	June 2018 Capacity Constrained Projections				February 2018 Projections	
		Passenger Ridership	Vehicle/Driver Ridership	Total Ridership	Annual Rate of Growth	Total Ridership	Jun. % Chg from Feb.
2010		12,463,027	10,169,074	22,632,101	(0.3%)		
2011		12,242,320	9,968,973	22,211,293	(1.9%)		
2012		12,236,081	9,983,059	22,219,140	0.0%		
2013		12,350,126	10,045,043	22,395,169	0.8%		
2014		12,696,936	10,154,905	22,851,841	2.0%		
2015		13,270,874	10,387,368	23,658,242	3.5%		
2016		13,523,385	10,559,240	24,082,625	1.8%		
2017		13,669,834	10,544,735	24,214,569	0.5%		
2018 <sup>2</sup>	24,571,000	13,848,000	10,691,000	24,539,000	1.3%	24,655,000	(0.5%)
2019	24,951,000	14,110,000	10,841,000	24,951,000	1.7%	24,946,000	0.0%
2020	25,151,000	14,150,000	10,998,000	25,148,000	0.8%	25,129,000	0.1%
2021	25,341,000	14,256,000	11,066,000	25,322,000	0.7%	25,284,000	0.2%
2022	25,537,000	14,392,000	11,104,000	25,496,000	0.7%	25,445,000	0.2%
2023	25,773,000	14,538,000	11,168,000	25,706,000	0.8%	25,638,000	0.3%
2024	25,986,000	14,675,000	11,220,000	25,895,000	0.7%	25,821,000	0.3%
2025	26,188,000	14,794,000	11,277,000	26,071,000	0.7%	25,998,000	0.3%
2026	26,393,000	14,923,000	11,325,000	26,248,000	0.7%	26,192,000	0.2%
2027	26,604,000	15,058,000	11,371,000	26,429,000	0.7%	26,396,000	0.1%
2028	26,821,000	15,198,000	11,410,000	26,608,000	0.7%	26,587,000	0.1%
2029	27,056,000	15,349,000	11,448,000	26,797,000	0.7%	26,784,000	0.0%

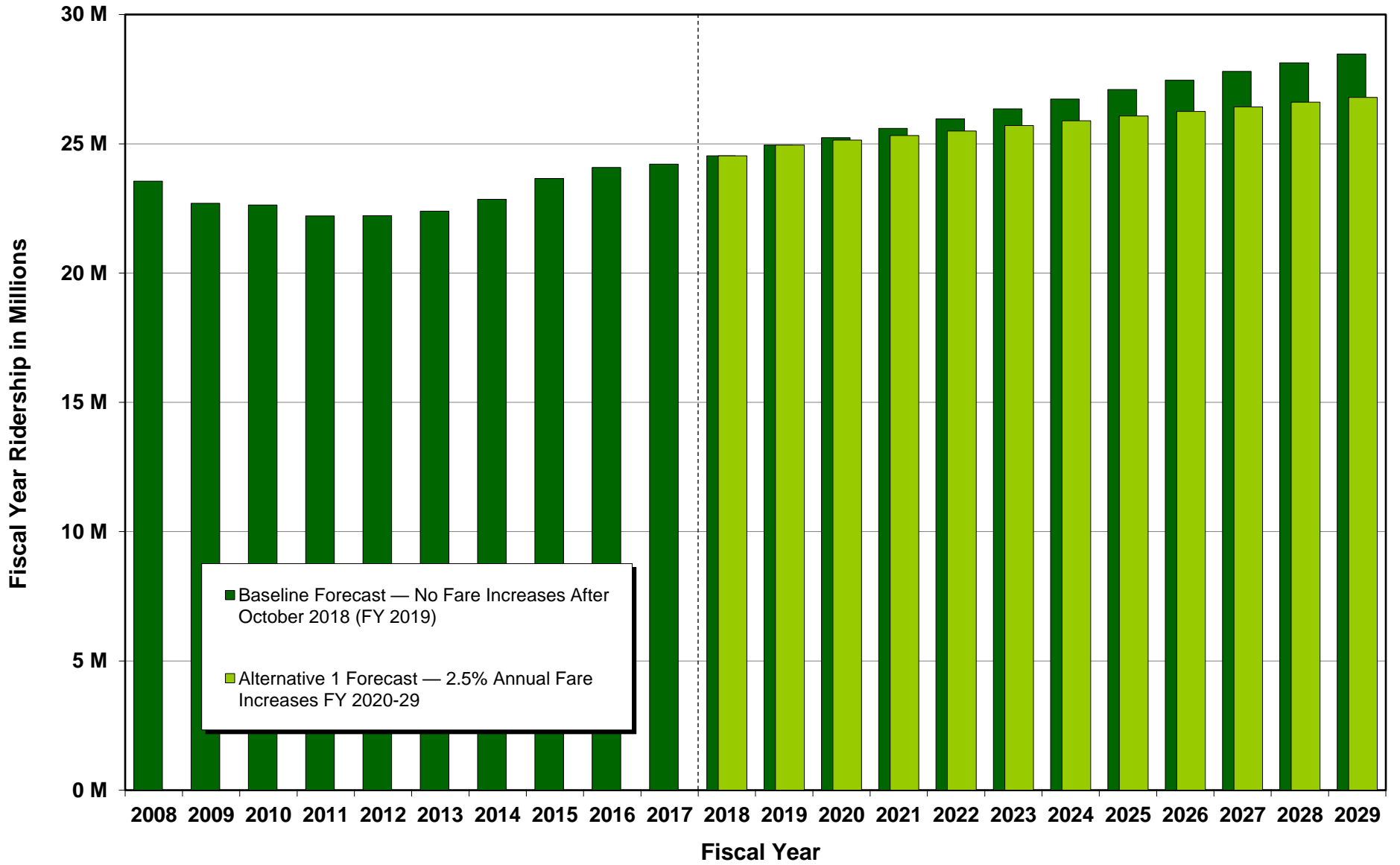
<sup>1</sup> The Baseline Forecast includes 2.1% passenger and 2.9% vehicle fare increases on October 1, 2017, followed by 2.1% and 2.5% increases, respectively, on October 1, 2018 (FY 2019), plus the 25¢ surcharge per fare sold for funding capital expenditures. The Baseline Forecast excludes any further changes to the nominal fares after October 2018, resulting in declining real fares thereafter. The Baseline Forecast also reflects the current programmed level of service subject to capacity constraints.

<sup>2</sup> FY 2018 includes actual ridership data through May 2018.

\* Excludes adjustments for vessel capacity constraints, 25¢ per fare capital surcharge impacts, and fiscal year-to-date actual data.

# Washington State Ferries — Ridership History and Forecast Trends

June 2018 Forecast – Fiscal Years 2008-2029



# **Enhanced Drivers Licenses & Identical Cards Alternative Forecast June 2018**

Prepared by

Washington State Department of Licensing

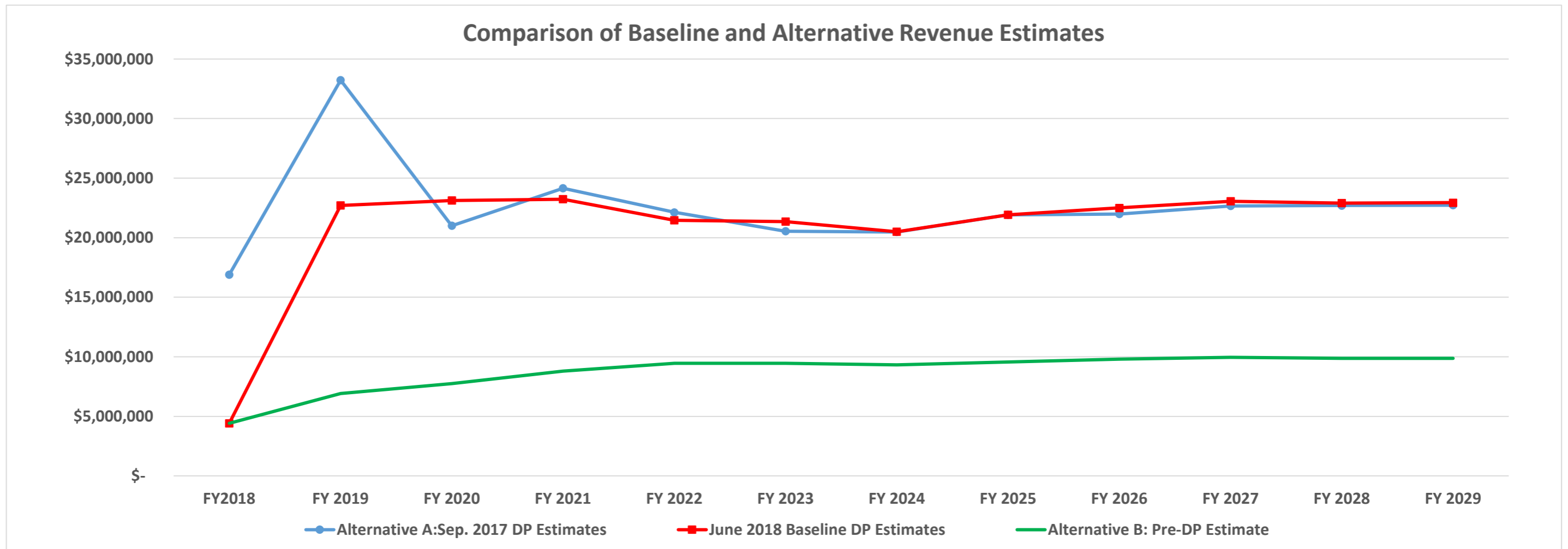
## Comparison of Alternative Enhanced Drivers License Revenue Forecasts to the Baseline June 2018 Forecast

	<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>June 2018 Baseline DP Estimates</b>	\$ 4,413,000	\$ 22,705,600	\$ 23,127,900	\$ 23,227,000	\$ 21,458,300	\$ 21,350,600	\$ 20,506,200	\$ 21,912,900	\$ 22,500,200	\$ 23,061,000	\$ 22,906,300	\$ 22,937,700
Alternative A: Sep. 2017 DP Estimates	\$ 16,896,000	\$ 33,227,000	\$ 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
\$ Difference from June Baseline forecast	\$ 12,483,000	\$ 10,521,400	\$ (2,128,900)	\$ 921,000	\$ 669,700	\$ (810,600)	\$ (33,200)	\$ 16,100	\$ (522,200)	\$ (393,000)	\$ (210,300)	\$ (200,700)
Percentage Change from the June Baseline Forecast	283%	46%	-9%	4%	3%	-4%	0%	0%	-2%	-2%	-1%	-1%
Alternative B: Pre-DP Estimate	\$ 4,413,000	\$ 6,924,000	\$ 7,742,000	\$ 8,795,000	\$ 9,460,000	\$ 9,441,000	\$ 9,320,000	\$ 9,566,000	\$ 9,798,000	\$ 9,954,000	\$ 9,857,000	\$ 9,863,000
\$ Difference from June Baseline forecast	\$ -	\$ (15,781,600)	\$ (15,385,900)	\$ (14,432,000)	\$ (11,998,300)	\$ (11,909,600)	\$ (11,186,200)	\$ (12,346,900)	\$ (12,702,200)	\$ (13,107,000)	\$ (13,049,300)	\$ (13,074,700)
Percentage Change from the June Baseline Forecast	0%	-70%	-67%	-62%	-56%	-56%	-55%	-56%	-56%	-57%	-57%	-57%

**June 2018 Baseline DP Estimates:** Is a close approximation of **Alternative A** with minor adjustment to FY19-21 given delays in public information campaign as well as FY18 actual to date.

**Alternative A: Sept. 2017 DP Estimate** reflects DOL's 2017 Decision Package request to build capacity to meet much higher anticipated EDL demand. It does not look at EDL adoption rate on an annual basis as Alternative B. Rather it focused on the first six years of ramp-up demand (FY18-23) around federal REAL ID enforcement date (Oct. 2020). Years beyond 2023 were simply renewals of what happens FY18-23.

**Alternative B: Pre-DP Estimate** is based primarily on actual observations to date with known policy changes incorporated in a relatively conservative manner. For example, it also incorporates additional demand around federal REAL ID enforcement date, but not to the extent as the Sept. 2017 DP request. The Pre-DP estimate has been the adopted EDL forecast since inception.



**June 2018 Baseline DP Estimates:** Is a close approximation of **Alternative A** with minor adjustment to FY19-21 given delays in public information campaign as well as FY18 actual to date.

**Alternative A: Sept.2017 DP Estimate** reflects DOL's 2017 Decision Package request to build capacity to meet much higher anticipated EDL demand. It does not look at EDL adoption rate on an annual basis as Alternative B. Rather it focused on the first six years of ramp-up demand (FY18-23) around federal REAL ID enforcement date (Oct. 2020). Years beyond 2023 were simply renewals of what happens FY18-23.

**Alternative B:Pre-DP Estimate** is based primarily on actual observations to date with known policy changes incorporated in a relatively conservative manner. For example, it also incorporates additional demand around federal REAL ID enforcement date, but not to the extent as the Sept. 2017 DP request. The Pre-DP estimate has been the adopted EDL forecast since inception.