2011 Statewide Transportation Survey

Report of Findings

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Research Overview

Goal

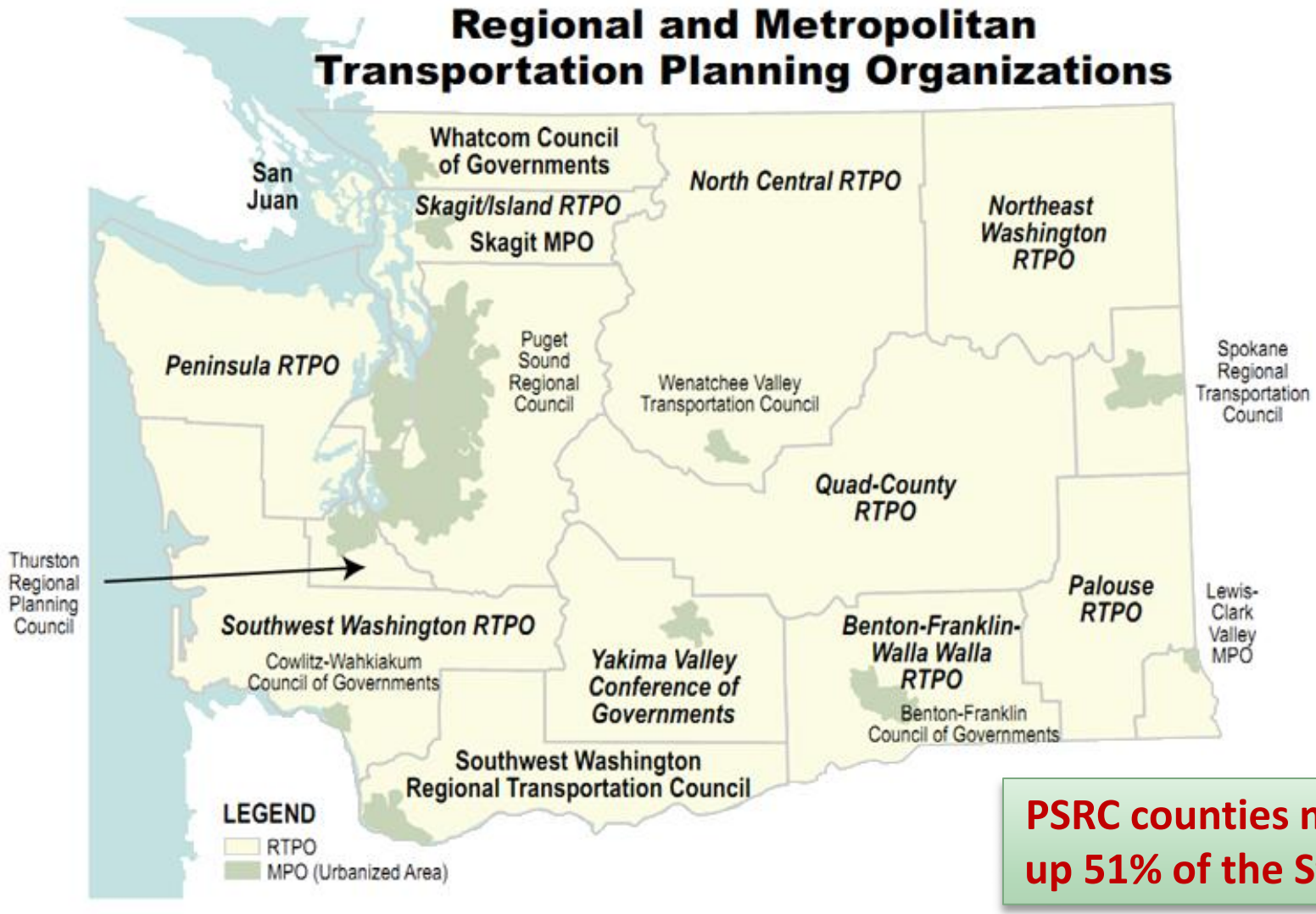
To provide WSTC, the Governor, and the Legislature with clear and accurate data about the attitudes, perceptions, and priorities that drive residents' thinking about transportation needs and funding.

The data and analysis will help inform specific transportation funding, program and investment decisions.

Approach

- ✓ Reach out to 100,000 adult residents in Washington state to invite them to participate in an online transportation survey (the survey could also be taken by phone).
- ✓ Structure the sample based on the state's 14 Regional Transportation Planning Organizations (RTPOs) so that each region has statistically valid data for regional comparisons.
- ✓ Collect a minimum of 5,000 demographically representative surveys across the state, structured by RTPO. A total of 5,518 responses were collected.
- ✓ Offer an open survey for the public to share their views (4,060 completes to date).
- ✓ Create a panel (Voice Of Washington State) of residents for future research projects. A total of 7,342 residents signed up for the panel through the random and public surveys - 70%+ of those completing the random survey indicated a willingness to participate in future research.

Regional Transportation Planning Organizations



PSRC counties make up 51% of the State.

Methodology

- A random sample of 100,000 household addresses was pulled from a representative list of Washington mailing addresses provided by the US Postal Service.

- The sample was stratified (structured) based on the state's 14 RTPOs to ensure that the data would include a representative sample from each region.

- Postcards were sent to all addresses, inviting respondents to complete the survey **online or by phone**. Several rounds of reminder calls were used to encourage participation. Live calls and a reminder letter were also used to boost response rates.

- A total of 5,518 statewide interviews were completed between September 16th and October 24th, 2011. The effective Margin of Error for the statewide results is +/- 2.0 percentage points at the 95% confidence interval.

- The survey results were weighted by RTPO and other key demographics to reflect the statewide adult population based on the 2010 Census.

Notes

- ***There was one survey questionnaire, administered via two approaches:***

  Approach 1: *100,000 randomly selected households received a post card inviting them to take the survey online or by phone. This random survey ran from September 16th to October 24th, 2011.*

  Approach 2: *The survey was posted on the WSTC web site in early October, opening it up to those who did not get a post card invite in the mail. The data collected via this "open" approach is being kept separate from the random survey data and the results will be tabulated separately so as to provide further input as well as to serve as a comparative point against the random/statistically valid survey.*

- ***This presentation only covers the results for the 5,518 completes from the random, by invitation survey. The results from the open, public survey are not included.***

- *To minimize self-selection bias the survey: 1) offered multiple ways (web and phone) to participate, 2) used an aggressive follow up strategy (phone and mail) to encourage participation, and 3) was regularly monitored and compared to 2010 Census data based on key demographics.*

- *The **Puget Sound Regional Council**, which includes King, Pierce and Snohomish counties, makes up **51.4% of the state** and, therefore, has a significant impact on the statewide results.*

- *San Juan County is not part of any RTPO, but for the purposes of this study San Juan County is included in the Island/Skagit RTPO. Kitsap County is a member of both the Peninsula RTPO and the PSRC. For the purposes of this study, Kitsap County is only included in the Peninsula RTPO.*

Interviews by RTPO

RTPO	Target n	Actual n	Margin of Error	% of State (weighted to 2010 Census)
Benton/Franklin/Walla Walla	300	304	±5.6%	4.7%
NE Washington	300	275	±5.9%	0.9%
North Central RTPO	300	261	±6.1%	2.3%
Palouse	300	362	±5.2%	1.2%
Peninsula RTPO	300	371	±5.1%	6.1%
Puget Sound Regional Council (**excludes** Kitsap)	900	1,230	±2.8%	**51.4%**
QuadCo	300	275	±5.9%	2.4%
Skagit/Island (**plus** San Juan)	300	331	±5.4%	3.1%
Spokane	400	439	±4.7%	6.9%
SW Washington RT Council	400	505	±4.4%	6.8%
SW Washington RTPO	300	271	±6.0%	3.9%
Thurston	300	351	±5.2%	3.8%
Whatcom	300	305	±5.6%	3.0%
Yakima Valley Conf. of Governments	300	238	±6.4%	3.6%
TOTAL	**5,000**	**5,518**		**100%**

Summary of Findings

Key Findings

1. *Most residents do not see the transportation system's needs or funding situation as immediately critical, however they still feel it is urgent to maintain an effective transportation system now and in the future.*

2. *Even though most residents are not convinced that the immediate need is critical, a strong majority are still willing to consider raising "some transportation taxes & fees." However, only 3 of the 9 specific revenue sources tested – electric vehicle fee, emissions fee, and tolling – receive majority support as ways to fund increased transportation investment.*

3. *Information about the urgency of the funding need does not appear to be an effective way to increase support for new revenue. Support does increase several percentage points after descriptions of the benefits of increased transportation investment.*

4. *Residents across the state place a high importance on maintenance and preservation and there are also clear regional priorities - e.g. transit, year round roads, ferries.*

5. *Tolling has majority support across the state – including Variable Tolls and Express Toll Lanes – and a majority favor using toll revenue to fund improvements within a travel corridor rather than just on the specific facility.*

6. *Increased state funding for transit and passenger rail has strong support in most of the state.*

7. *There is strong support for state funding of the ferry system, although initial support is primarily driven by strong numbers in the areas that rely on the ferry system.*

Overall Attitudes about the Washington's Transportation System

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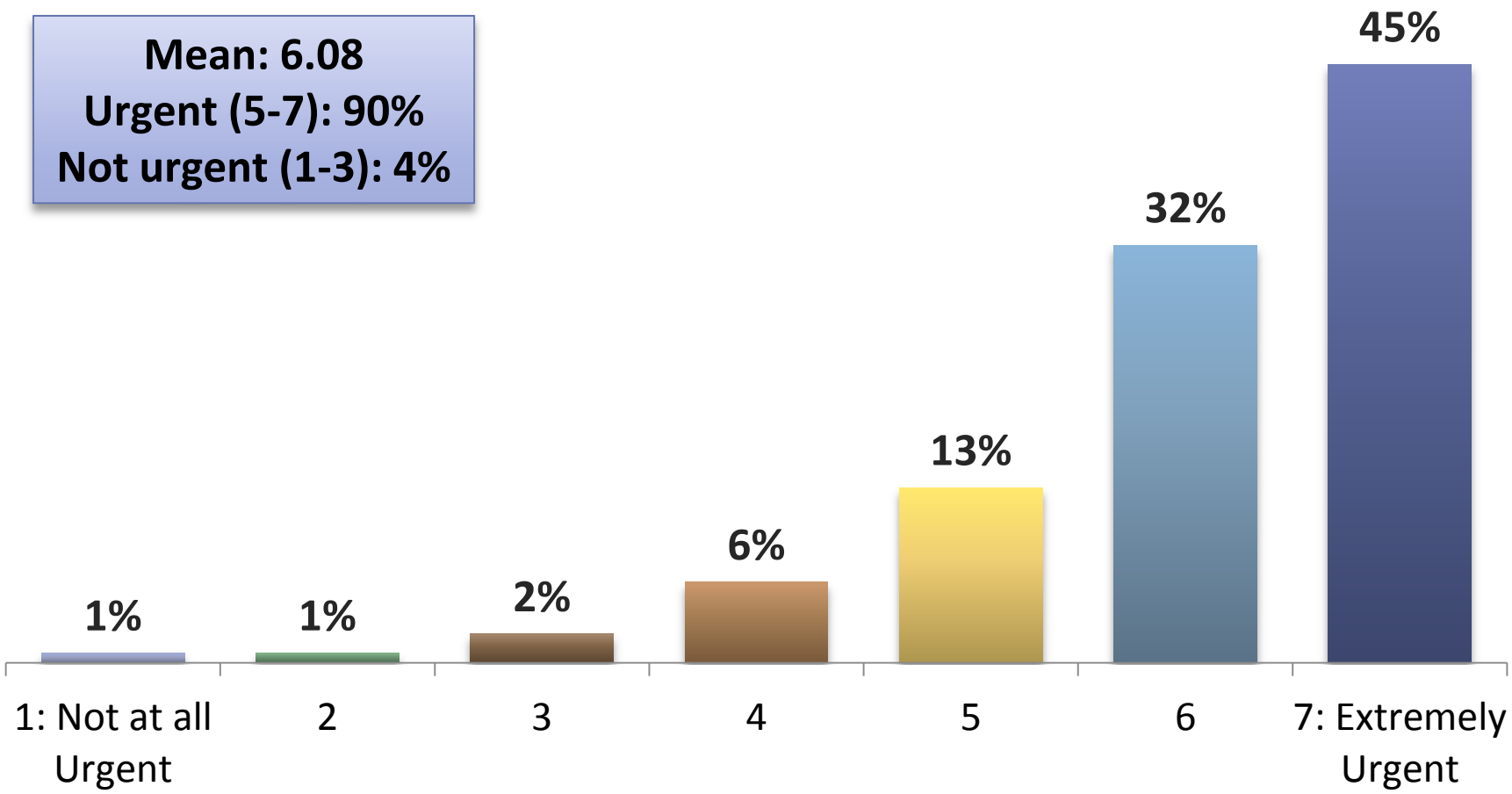
Maintaining an Effective System

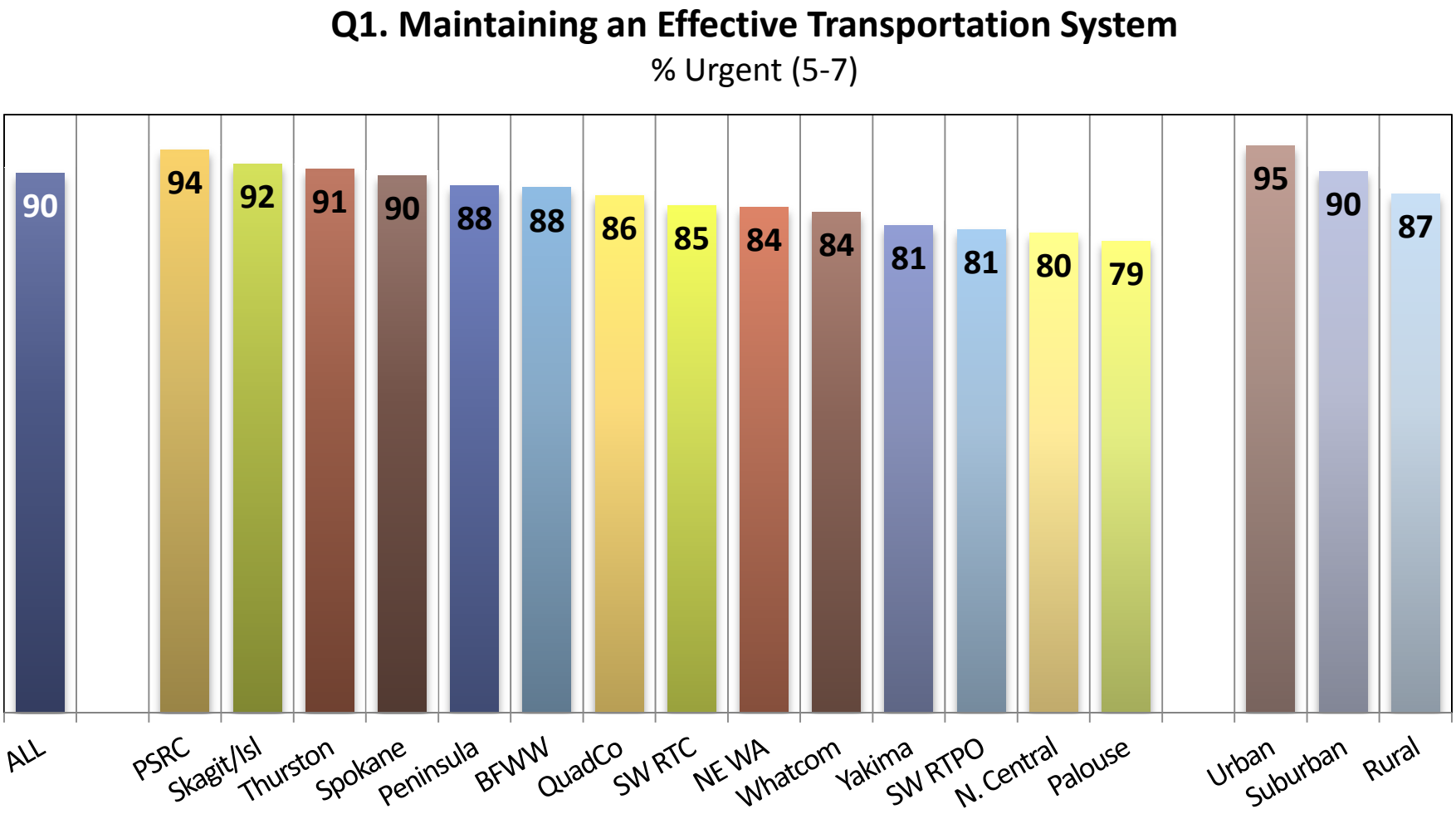
- *Maintaining an effective transportation system is clearly a high priority for residents across the state.*
- *Almost half (45%) of residents say it is "extremely urgent" (a 7 on a 7 point scale) to "make sure Washington's transportation system works effectively today and into the future." Another one-third (32%) rank it as a 6 on a 7-point scale.*

Maintaining an Effective Transportation System

Q1. How urgent do you feel it is to make sure Washington's transportation system works effectively today and into the future? **(*not asked relative to other state priorities)**



Urgency by RTPO



Urgency is high across the state – highest in Urban areas.

Grading the Transportation System

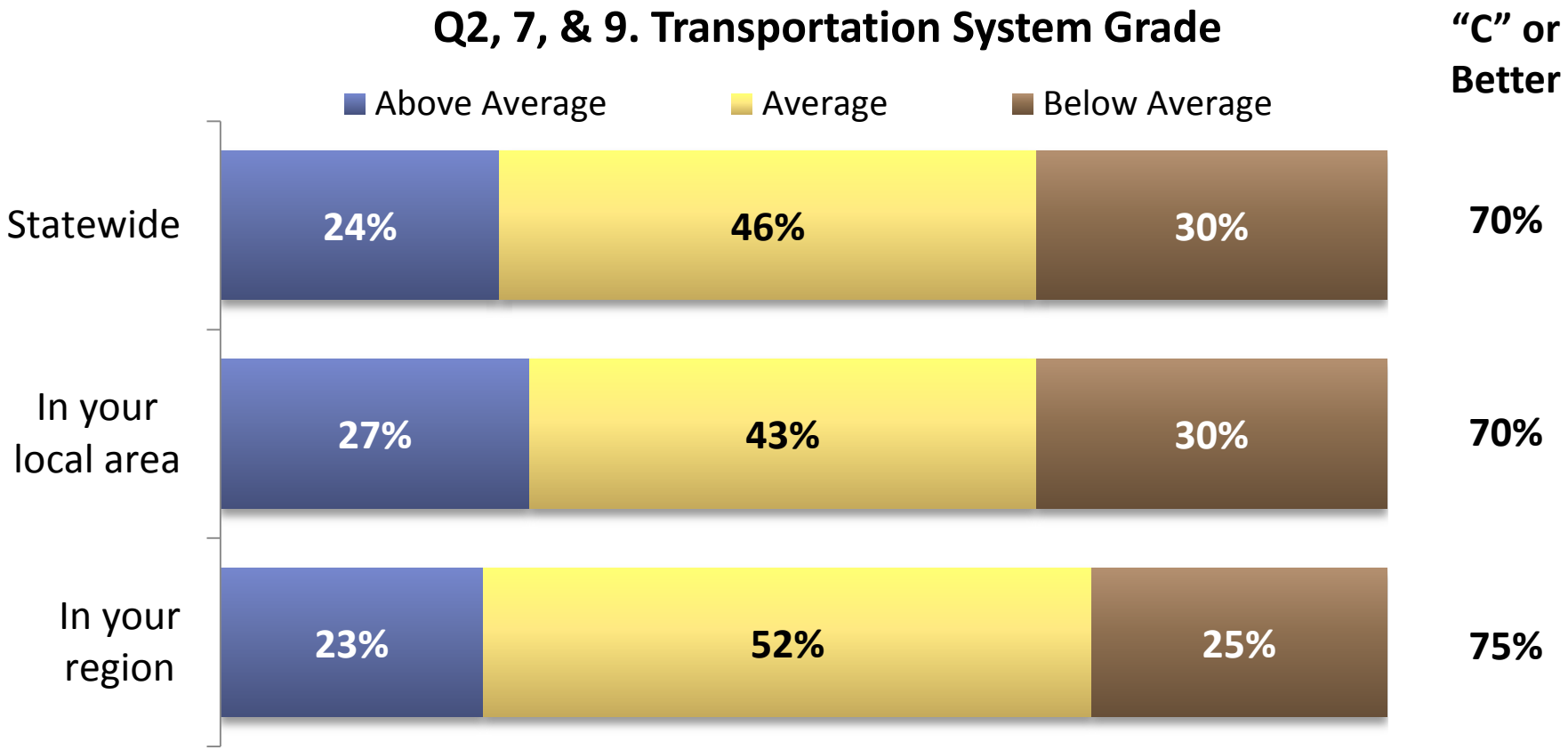
- *Most residents give the state transportation system a "C" or better grade. Very few residents believe the system is in crisis. This leads to uncertainty about whether or not there is a pressing need for additional transportation revenue.*
- *Most residents also grade their local and regional transportation systems as average or above.*
- *There are three RTPOs – Spokane, SW Washington RTPO, and NE Washington – where residents have significant concerns about their local transportation system.*

Grading the Transportation System

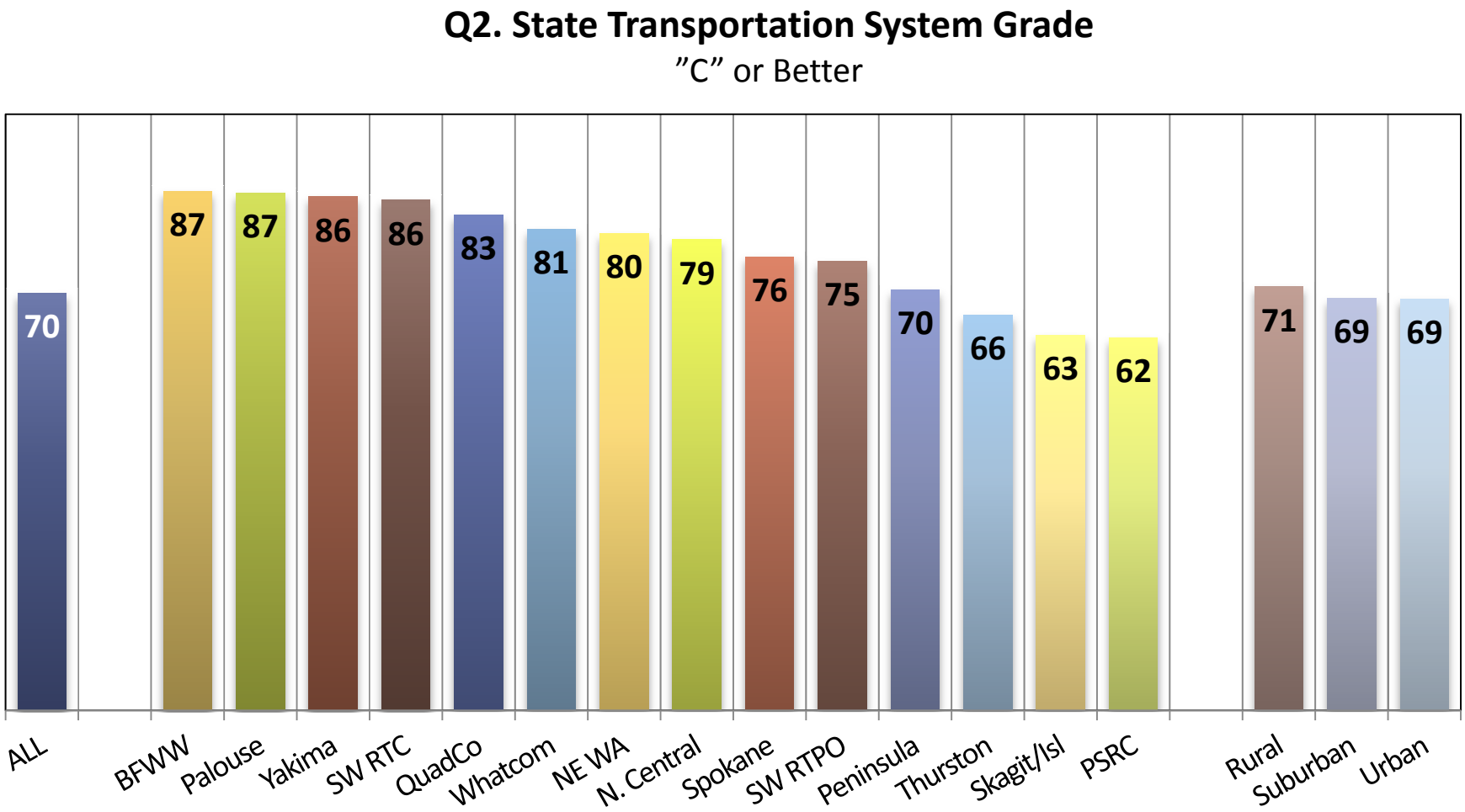
*Q2. Using an A, B, C, D or F grading scale, how would you rate **Washington's transportation system overall**?*

*Q7. How would you rate the transportation system **in your local area** - that is in your city or town and the areas immediately surrounding it?*

*Q9. How would you rate the transportation system **in your region** – that is in your county and nearby counties?*

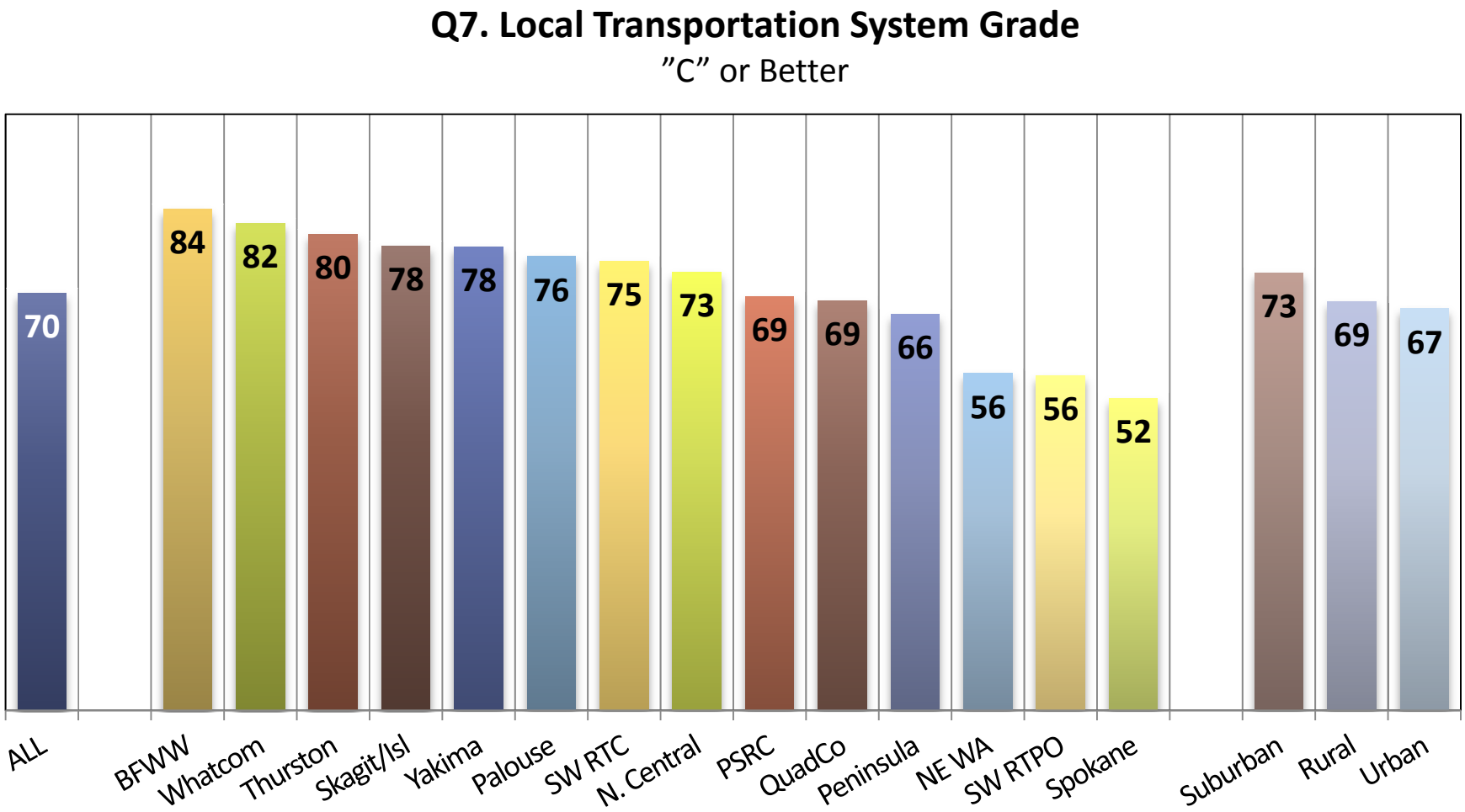


State System by RTPO



Grades generally higher in Eastern WA – PSRC & Skagit/Island lowest.

Local System by RTPO



Grades somewhat higher in Urban areas – low in NE WA SW RTPO, Spokane.

Grading the State

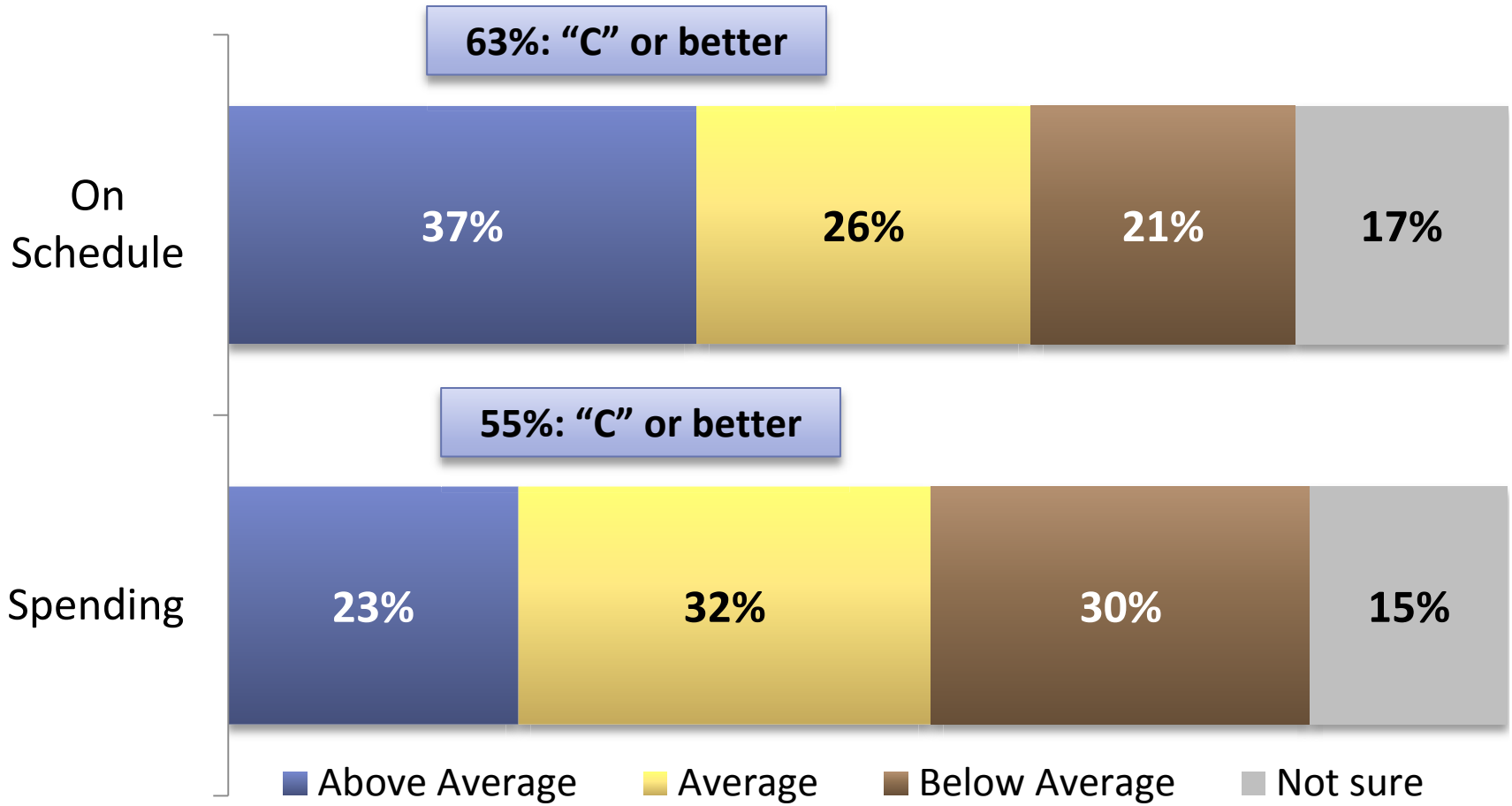
- *The state generally receives average or higher grades for completing projects on schedule and for spending transportation dollars responsibly, but almost one in five residents are unable to grade the state on these measures.*

- *Residents in most RTPOs give the state a "C" or better grade for transportation funding fairness, but in two RTPOs – Spokane and NE Washington – the state gets very low marks for funding fairness. Residents in these two RTPOs are also particularly dissatisfied with their local transportation system, which is likely a strong driver of the low grade for funding fairness.*

On Schedule/Spending Responsibly

Q6. What grade would you give the state for completing transportation projects on schedule?

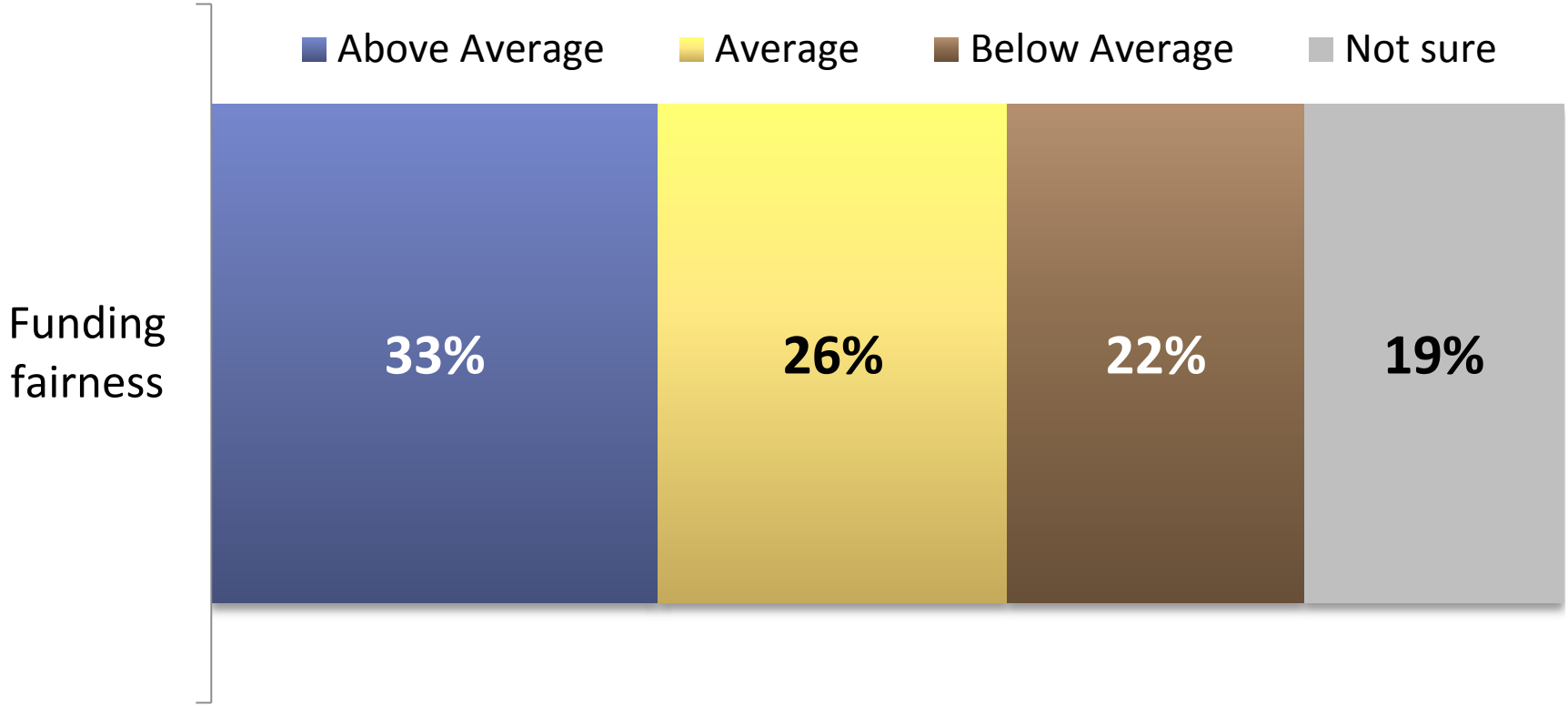
Q4. What grade would you give the state for spending transportation dollars responsibly?



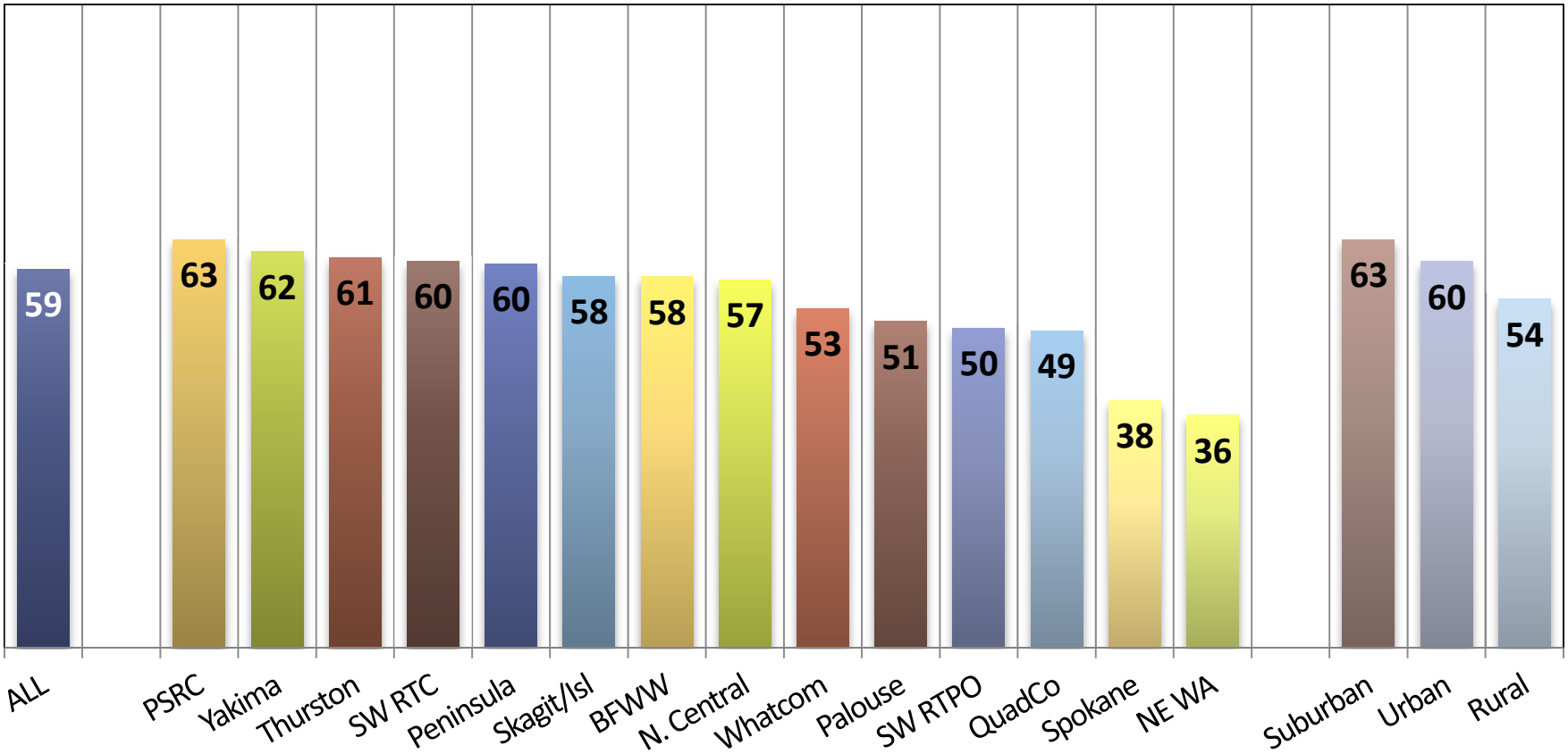
Funding Fairness

Q5. What grade would you give the state for making sure your area of the state gets a fair share of transportation funding?

59%: "C" or better
Average: 2.14



Funding Fairness by RTPO



Majority "C" or Better in 10 of 14 RTPOs – weakest in Spokane & NE WA.

Transportation Priorities

Transportation System Objectives

- *Looking at 5 overall transportation system objectives – maintaining the system, increasing capacity, expanding travel options, improving safety, and protecting the environment – residents believe the most emphasis should go to maintaining the transportation system, followed by increasing capacity and expanding travel options, although all three are closely ranked.*

- *The statewide numbers are driven by strong support for maintenance and expanding travel options in urban areas and strong support for maintenance and expanding capacity in suburban and rural areas.*

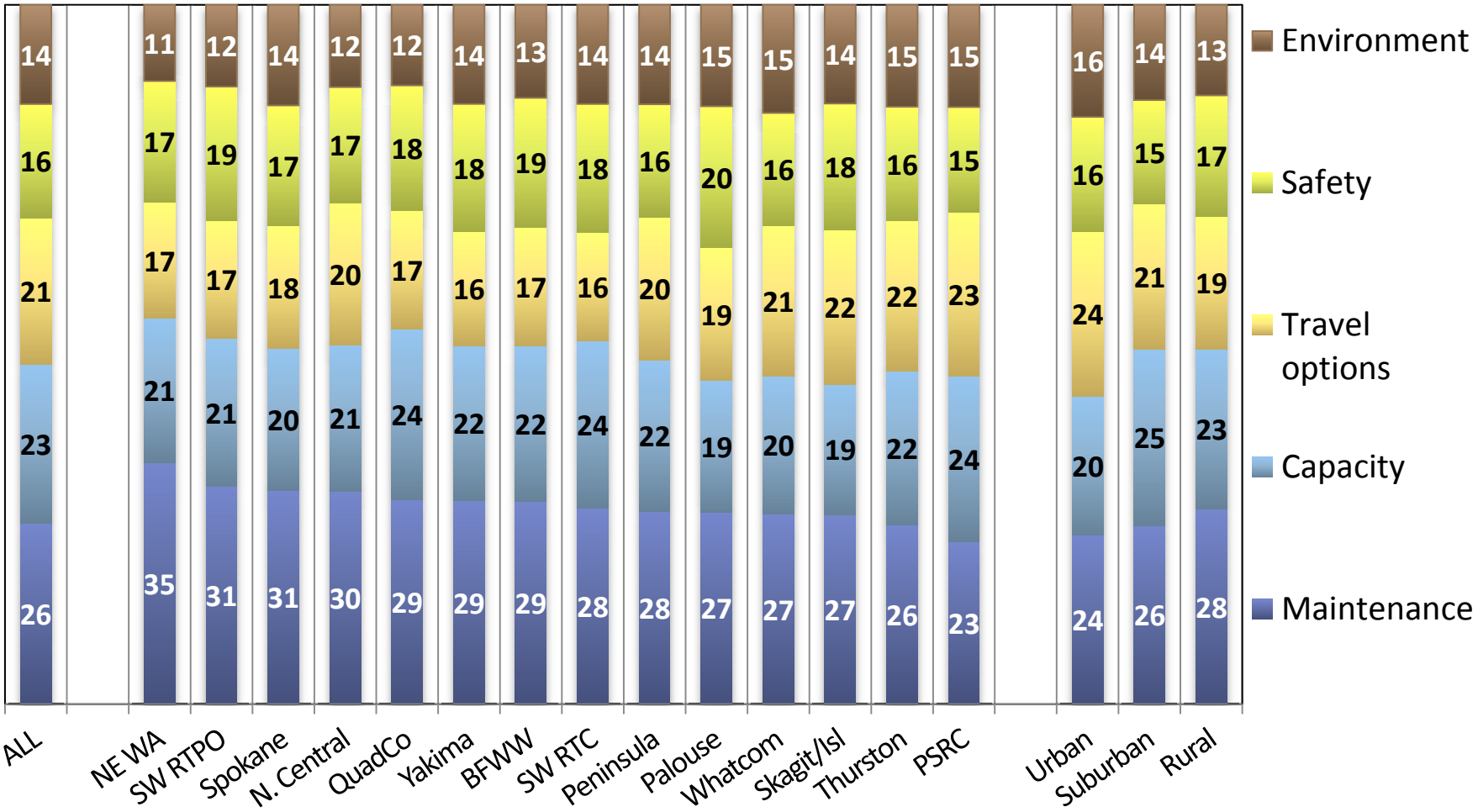
Prioritizing Transportation Objectives

*Q12. There are a number of objectives our transportation system is designed to meet. If you had **100 points** to divide between the five objectives below, how many points would you assign to each objective?*

For example, if you assign 25 points to "improving safety" that means you think "improving safety" should get 25% of the focus. The total for the 5 objectives should add up to 100 points.

Maintaining the system: preserving and extending the life of our current transportation system through ongoing maintenance of our roads, bridges, transit systems, ferries, sidewalks and bike paths	26
Increasing capacity: improving the movement of goods and people through things like widening existing roads, and building new roads to accommodate our growing population and to connect more remote communities	23
Expanding travel options: giving people more options for getting around through things like expanded public transit, more passenger rail, carpooling and bike and pedestrian improvements	21
Improving safety: making our roads, bridges, transit systems, airports, ferries, sidewalks and bike paths safer through things like improved design and increased enforcement	16
Protecting the environment: promoting transportation investments that help reduce air and water pollution, conserve energy and minimize impacts on the environment	14

Transportation Objectives by RTPO



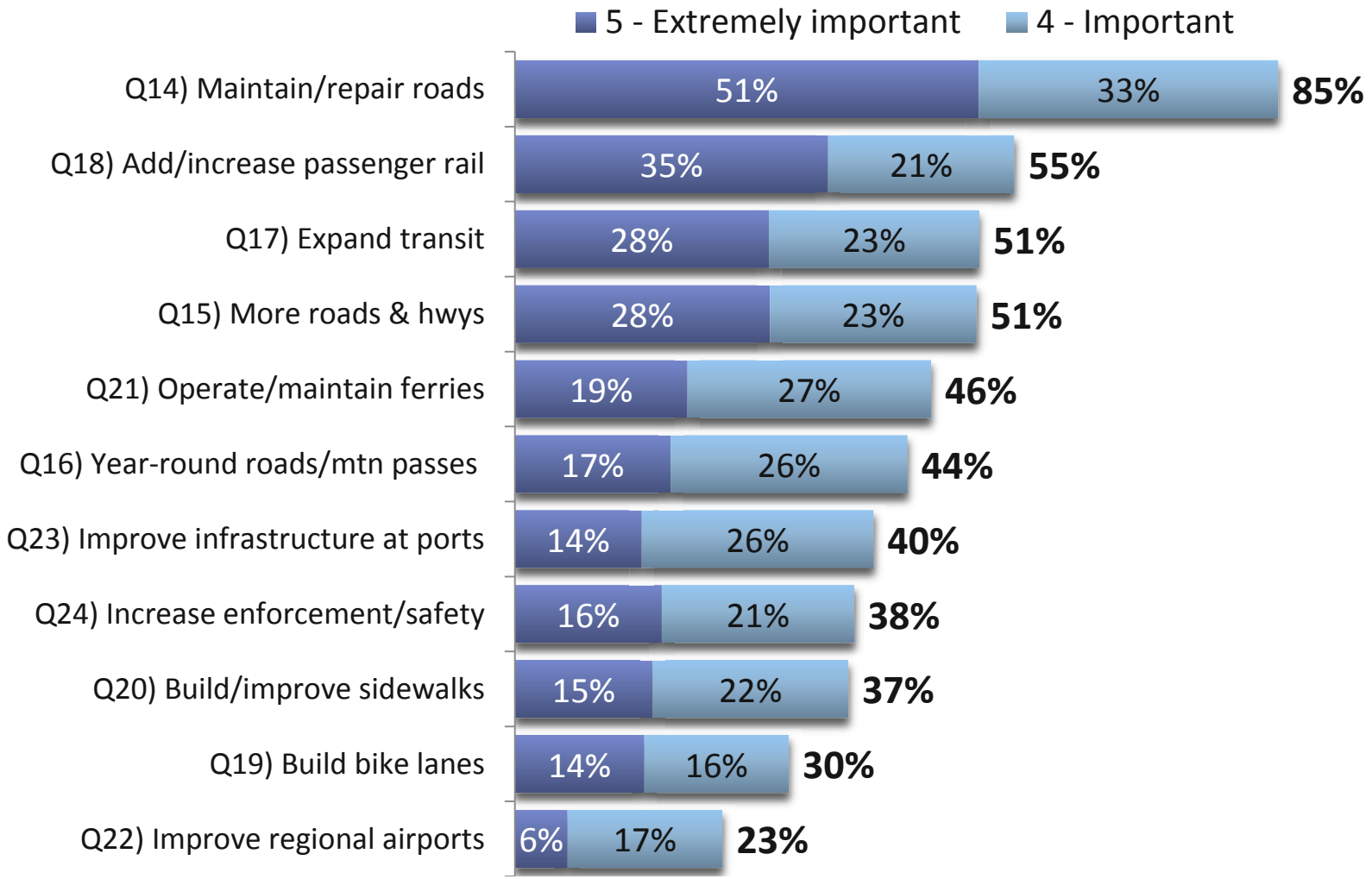
Maintenance strong eastern WA/travel options in Puget Sound/Urban areas.

Transportation Improvements

- *Out of eleven specific transportation improvements, maintaining and repairing existing roads/highways is again seen as the most important, both overall and within each RTPO. Beyond the consensus on maintenance, there are some clear regional differences:*
  - *The two transit-related improvements – adding/increasing intercity passenger rail and expanding transit service – are 2nd in overall importance based primarily on strong support in the RTPOs in and around Puget Sound.*
  - *Keeping rural roads and mountain passes open year round is the second most important improvement in 8 of 14 mostly rural RTPOs – North Central, Yakima, NE Washington, QuadCo, Palouse, BFWW, SW RTPO and Spokane. Low importance for residents in the PSRC area keeps this from being a higher overall priority.*
  - *Operating/maintaining the ferry system is the 2nd most important improvement in the Peninsula, Skagit/Island, and Whatcom RTPOs.*

Transportation Investments

Q14-Q24. Please indicate how important each of the following transportation components is to you.



Investments by RTPO

Q14-Q24. *This table shows the importance of the 11 transportation investments ranked by color– green squares indicate the most important investments followed by yellow, and then red for the lowest rated. Scanning the table for green squares indicates which investments are most important in each RTPO.*

	ALL	BFWW	NE WA	N. Central	Palouse	Penin-sula	PSRC	Quad Co	Skagit/ Island	Spok-ane	SW RTC	SW RTPO	Thur-ston	What-com	Yakima
Maintenance	**85**	91	88	85	83	89	82	85	84	92	88	89	83	82	88
Passenger rail	**55**	43	30	46	44	51	64	40	53	42	41	47	64	53	39
Expand transit	**51**	42	36	44	41	55	58	37	54	43	40	46	49	51	39
More roads	**51**	56	48	47	45	45	54	53	39	50	54	49	41	39	50
WA ferry system	**46**	32	26	35	27	80	50	38	69	29	31	36	35	54	27
Yr-round roads	**44**	56	68	76	63	44	36	64	43	56	40	54	34	37	72
Port infrastruct	**40**	38	27	36	43	43	40	49	33	38	46	44	33	33	40
Enforcmt/safety	**38**	40	35	32	30	33	36	44	39	40	46	43	35	38	48
Sidewalks	**37**	38	18	28	35	28	39	34	35	34	37	32	39	39	41
Bike lanes	**30**	31	21	31	27	33	30	30	35	34	26	23	30	43	27
Regnl airports	**23**	32	16	30	34	19	20	31	20	33	22	21	19	33	28

Maintenance is strong across the state – significant regional differences on others.

Investments by Area/Travel Habits

Q14-Q24. *This table shows the importance of the 11 transportation investments ranked by color– green squares indicate the most important investments followed by yellow, and then red for the lowest rated. Scanning the table for green squares indicates which investments are most important in each Area type & by Travel Habits.*

	ALL		Urban	Sub-urban	Rural		Drive Alone 75%+	Drive alone 25-74%	Drive alone <25%		Transit 50%+	Transit <50%	No Transit
Maintenance	**85**		81	86	86		87	85	79		74	78	87
Intercity rail	**55**		65	54	48		51	54	65		74	77	49
Expanding transit	**51**		61	49	45		47	50	64		78	76	44
More roads	**51**		47	54	53		58	49	41		36	32	57
WA ferry system	**46**		49	44	45		44	45	50		57	56	43
Year-round roads	**44**		42	35	53		46	42	41		35	37	46
Port infrastructure	**40**		40	40	39		43	36	37		36	41	40
Enforcemnt/safety	**38**		35	37	39		39	34	40		38	33	39
Sidewalks	**37**		44	36	31		31	37	48		43	51	34
Bike lanes	**30**		38	26	27		25	32	40		42	44	26
Regional airports	**23**		22	21	25		24	22	23		24	22	23

Surprisingly similar by Area – even heavier drivers support transit investments.

Revenue

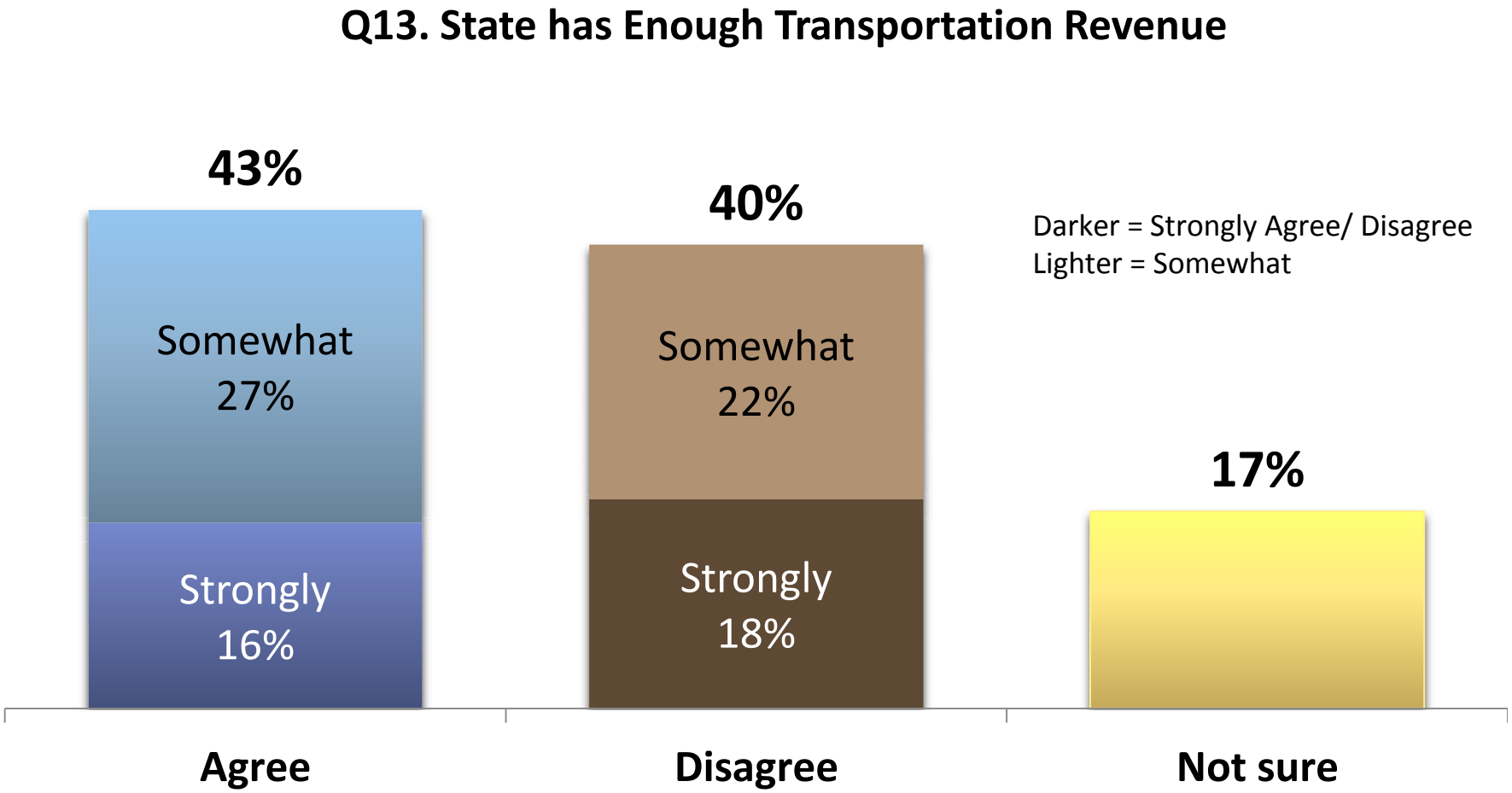
Current Transportation Revenue Situation

- *Overall residents are divided over whether or not "the state has enough to keep our transportation system safe, effective and properly maintained." However, only one-in-five "strongly" disagree with this assertion, indicating that most residents do not think that there is a transportation revenue crisis.*

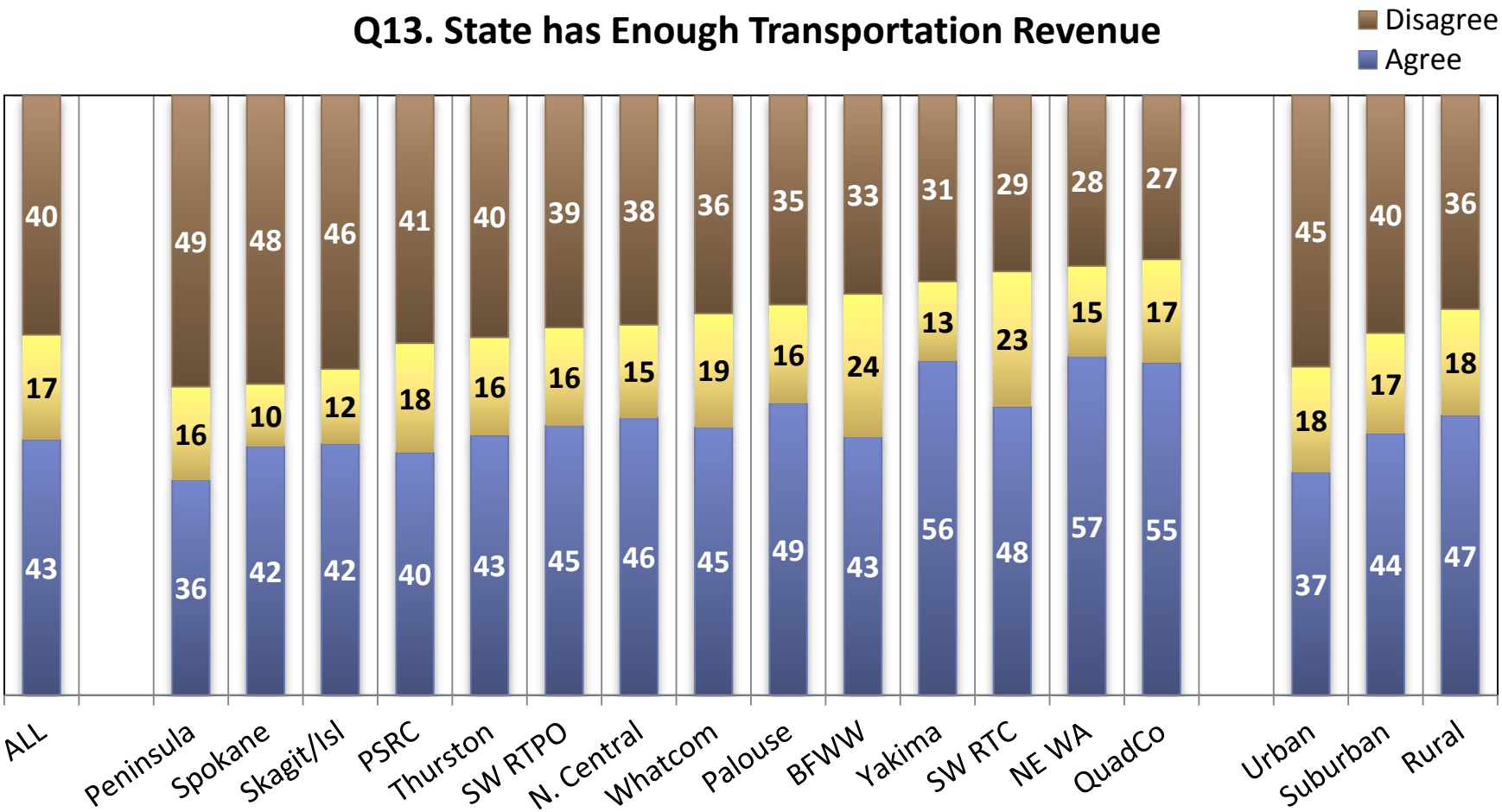
- *Almost one-in-five say they are not sure whether or not the state has enough transportation revenue.*

Is there enough revenue?

Q13. Do you agree or disagree with the following statement:
The State has enough revenue to keep our transportation system safe, effective and properly maintained.



Enough Revenue by RTPO



Significant % not sure – Rural/Suburban more likely to agree state has enough.

Support for New Revenue

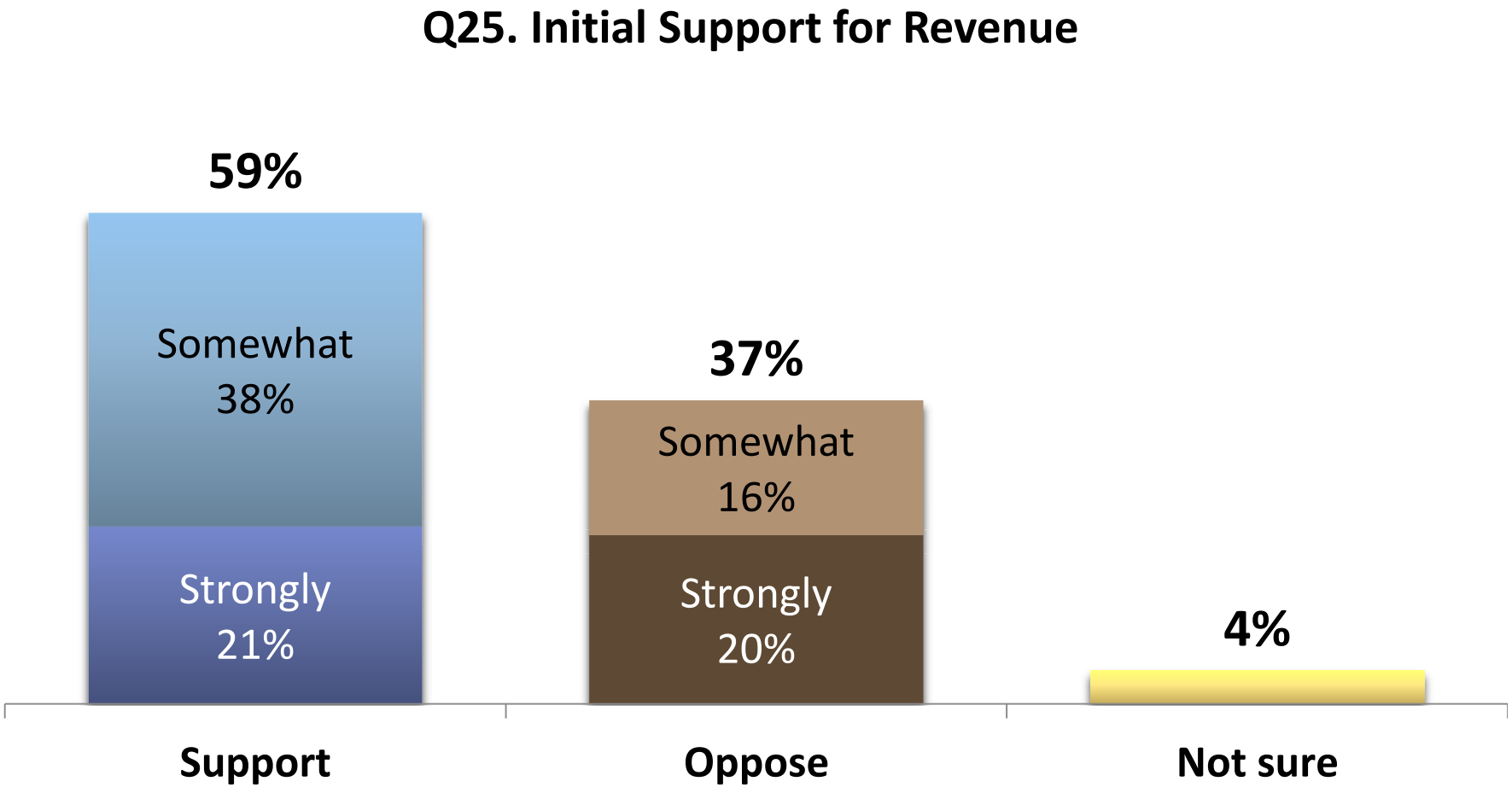
- *Despite not being convinced that there is an urgent need for new revenue, a strong majority are willing to consider raising "some transportation taxes and fees."*

- *However, this question does not ask about specific revenue sources or amounts or specific spending plans. Support for a transportation package will be heavily dependent on these elements. This is clear from the fact that only 3 of the 9 funding sources tested in the survey receive majority support as "good ways to fund increased investment in our transportation system."*

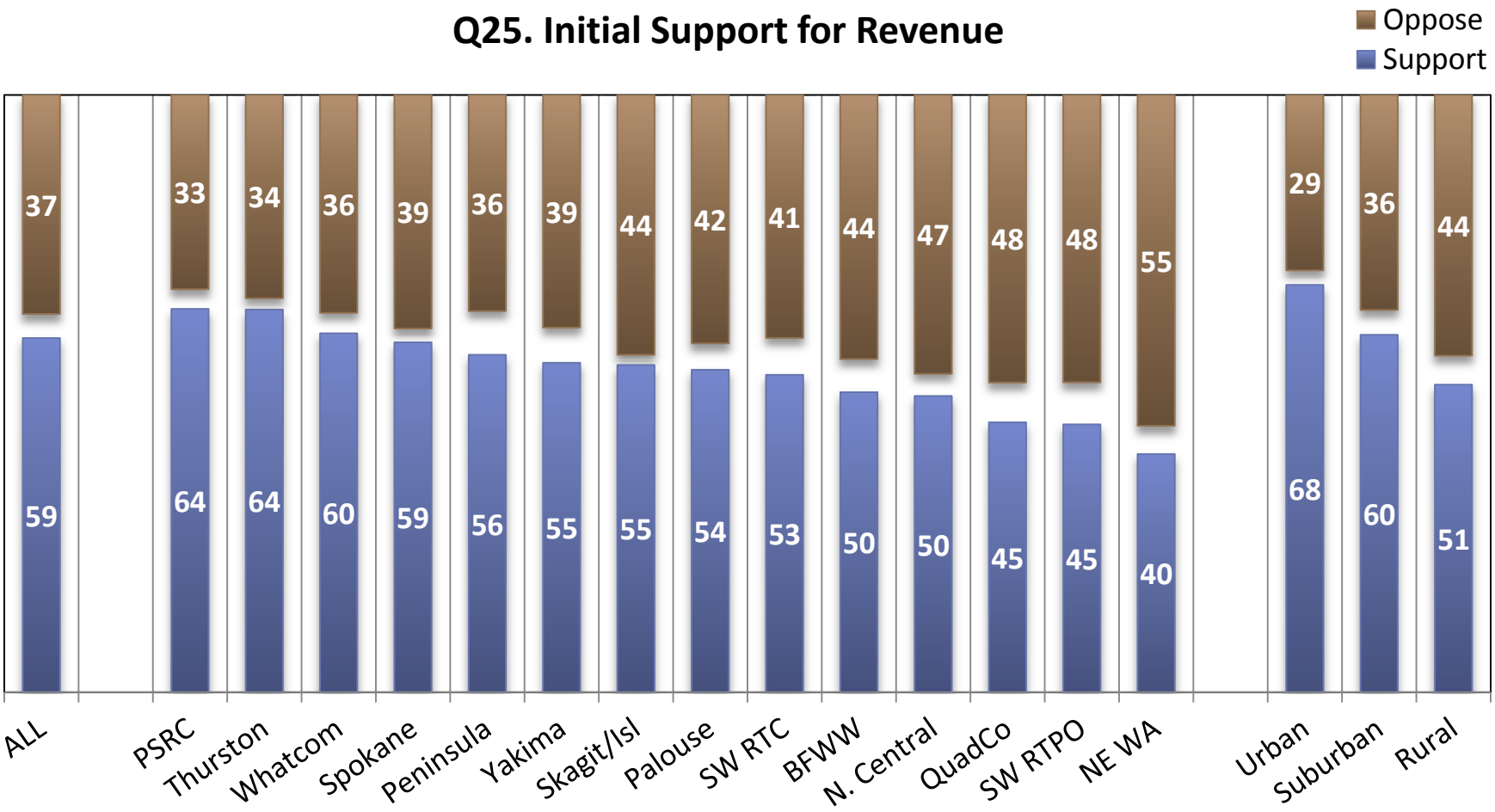
- *Talking about the critical nature of the funding/maintenance situation is not effective in increasing support for new revenue. Describing the benefits of increased investment does increase support.*

Support for Additional Revenue

Q25. In general, would you support or oppose raising some transportation taxes and fees to increase funding for those transportation elements you feel are important?

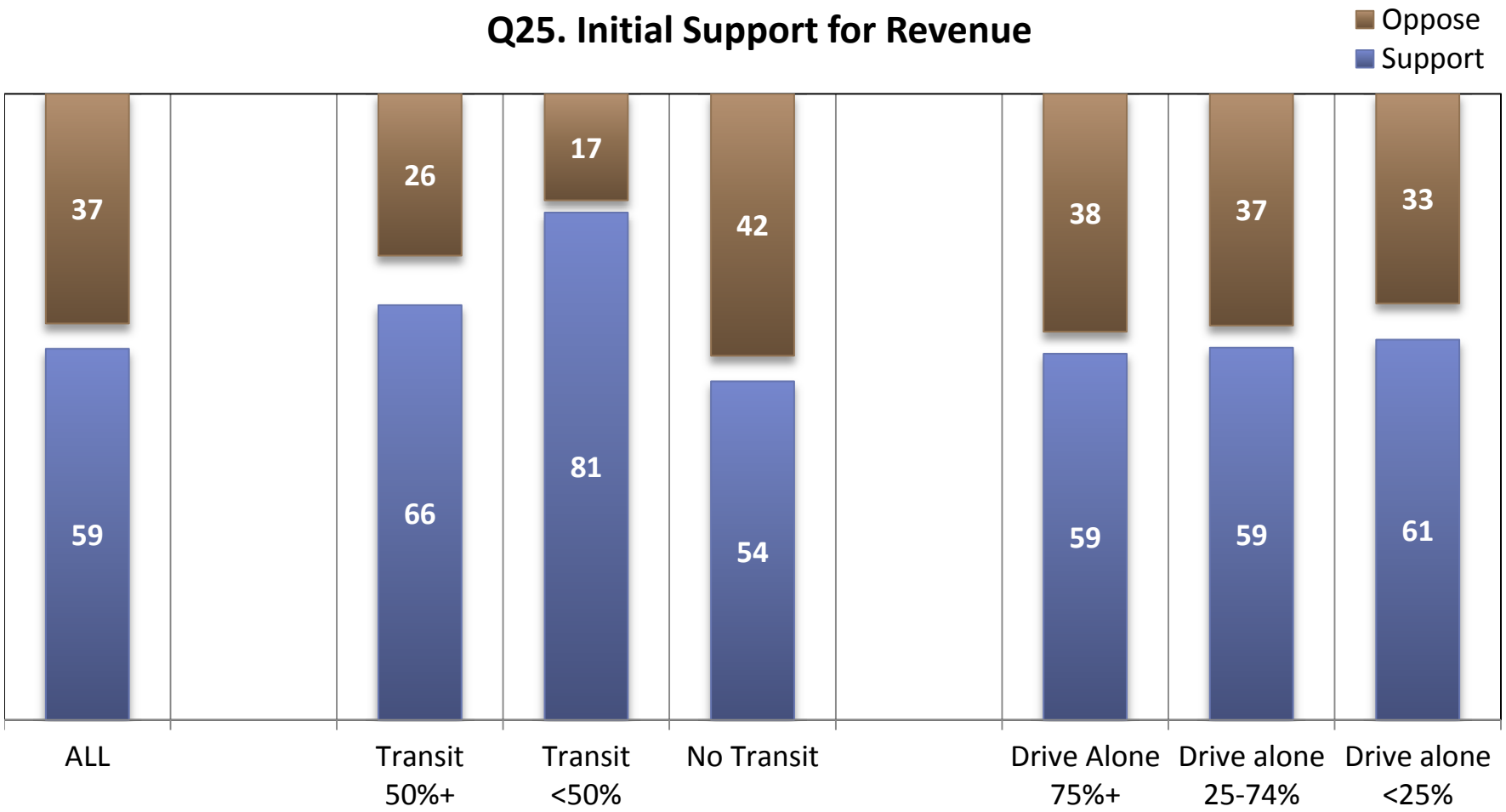


Additional Revenue by RTPO



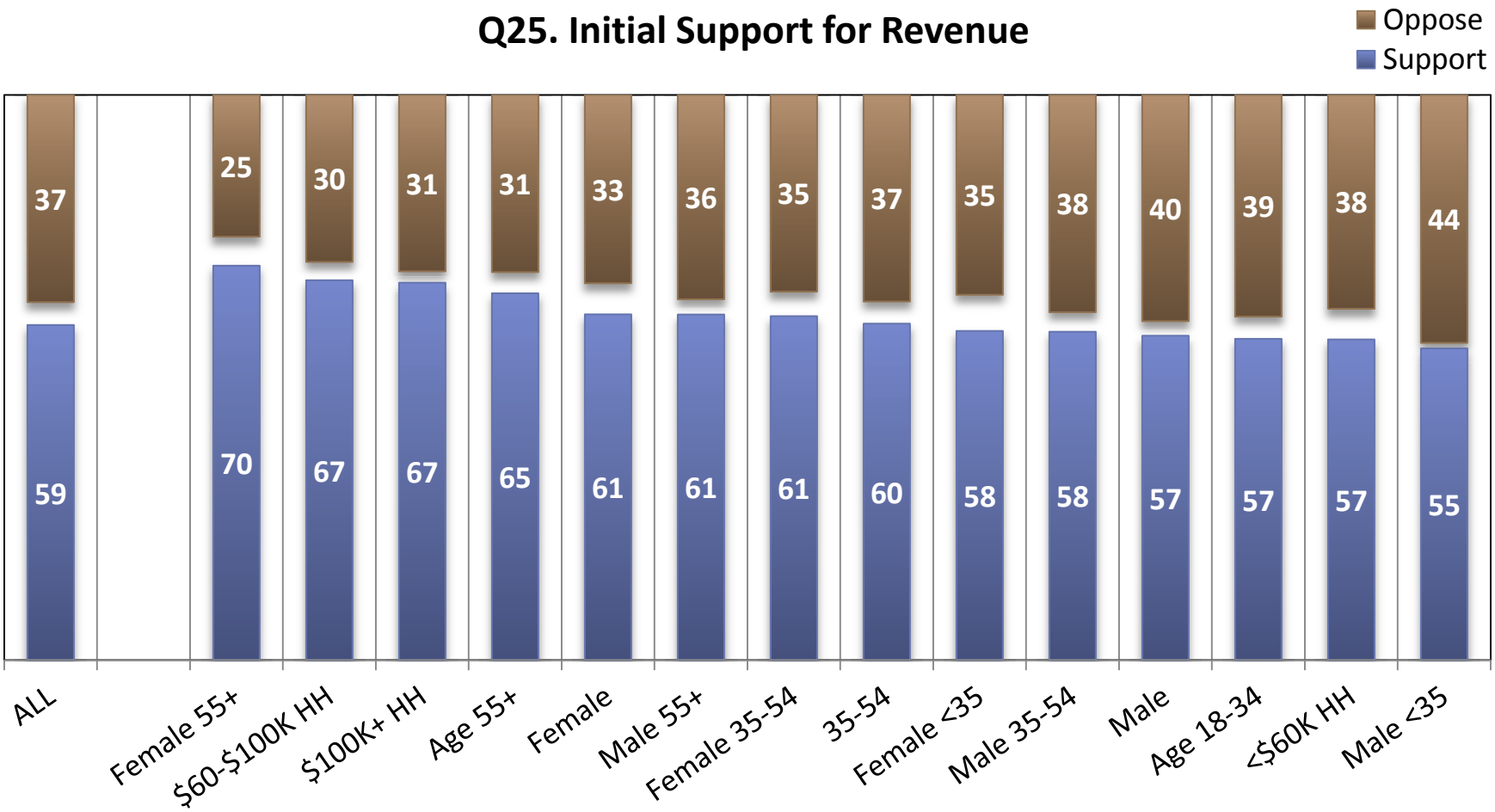
Majority support in 11 of 14 RTPOs – strong support in Urban, Suburban.

Additional Revenue by Travel Habits



Transit users/less frequent drivers strongest supporters of new revenue.

Additional Revenue by Demographics



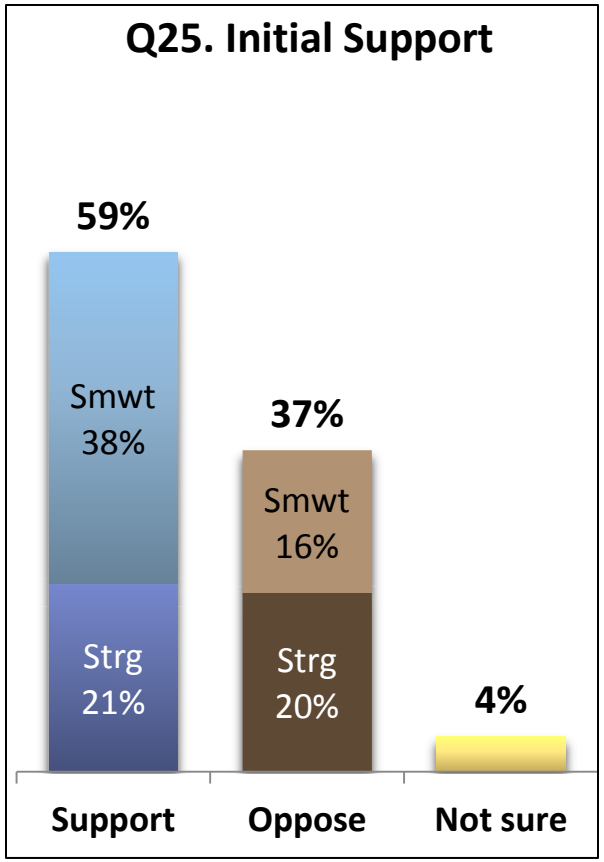
All majority support –older, higher income women strongest support.

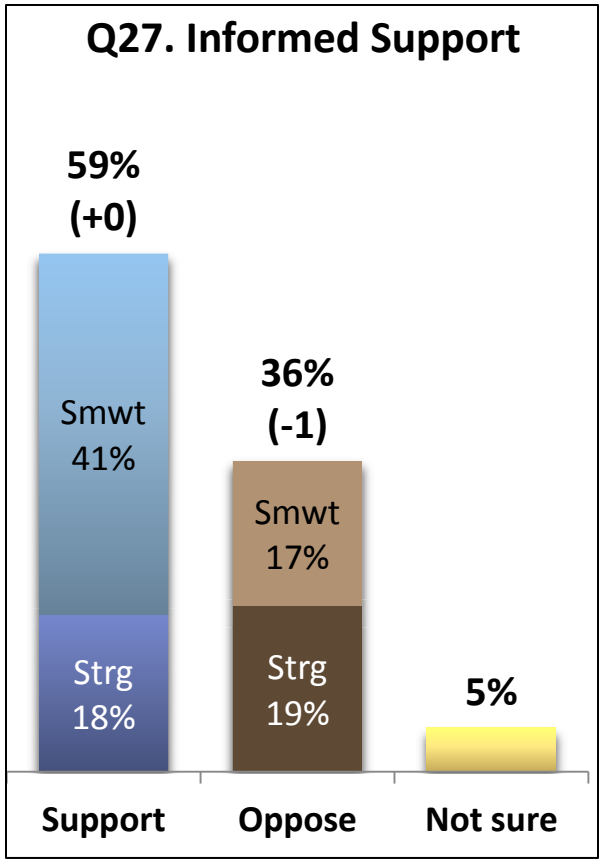
Support for Additional Revenue

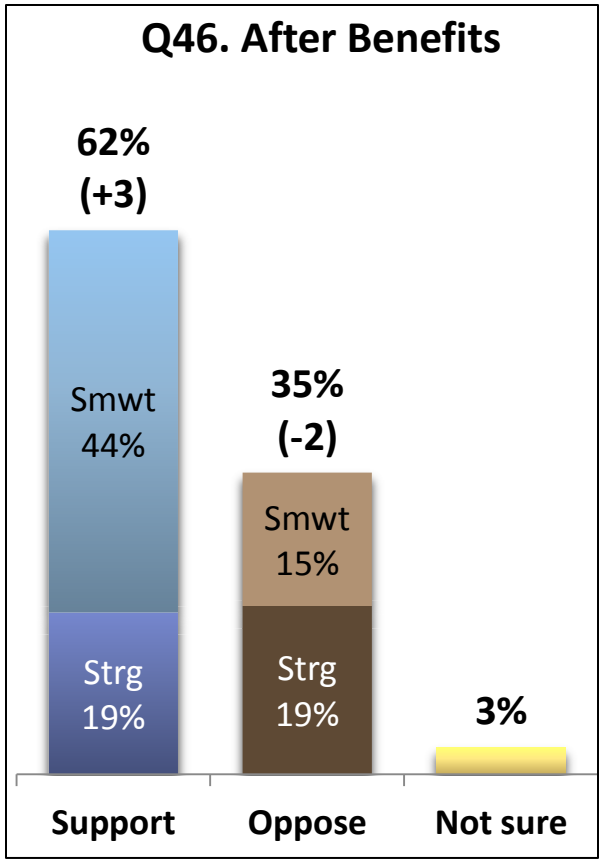
Q25. In general, would you support or oppose raising some transportation taxes and fees to increase funding for those transportation elements you feel are important?

Q27. Over the next 20 years, our state will need to fund more than $64 billion in state transportation needs. This amount does not include the long-term unfunded transportation needs of cities, counties and local transit agencies. Current transportation revenues are already dedicated to paying for existing projects …

Q46. This survey has highlighted a number of different benefits of increased transportation funding. Given all of this, would you support or oppose increasing some transportation taxes and fees to meet our transportation system's needs?





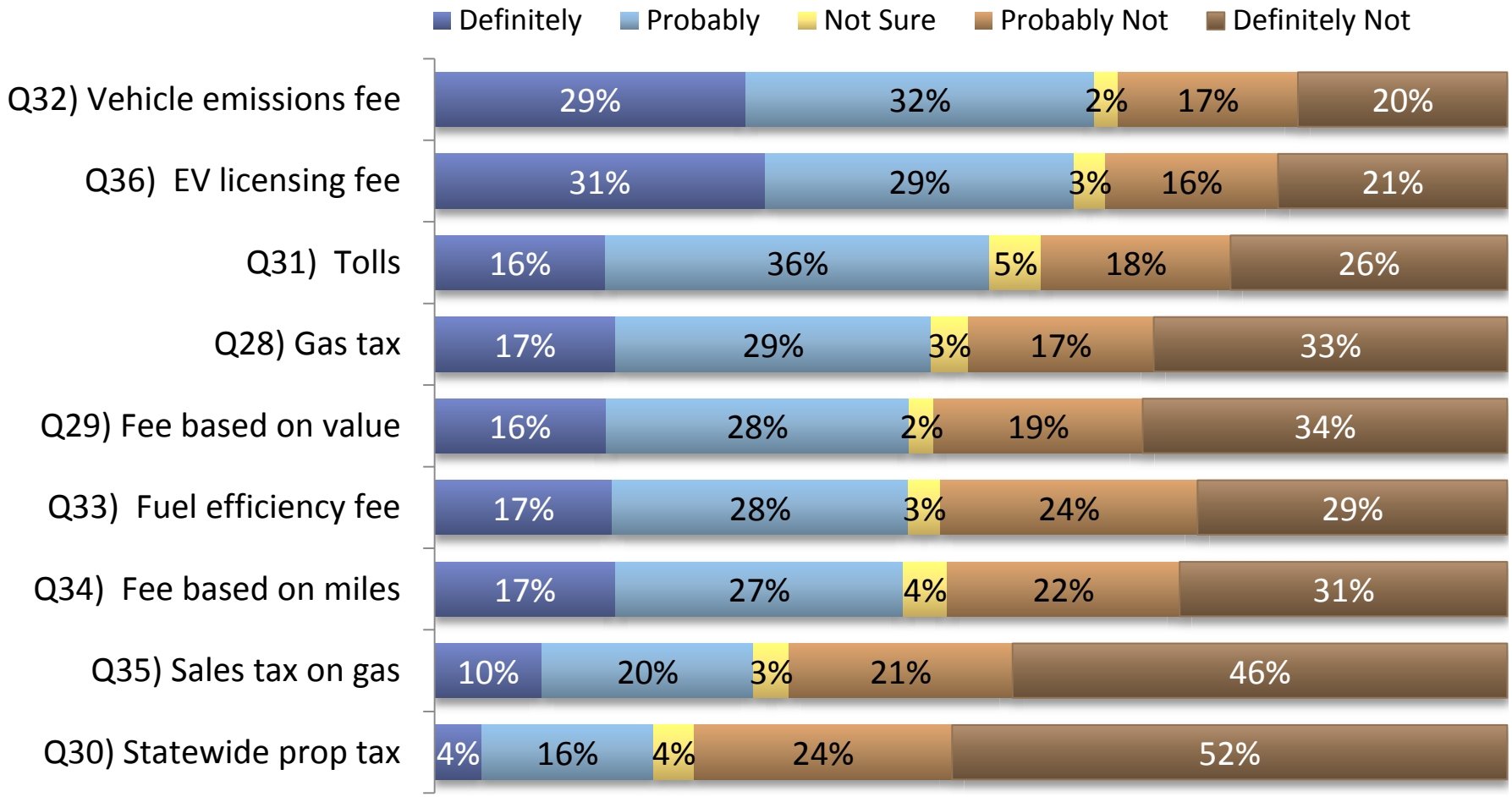


Preferred Revenue Sources

- *While residents are not de facto opposed to the idea of new transportation revenue, most potential funding sources receive limited support as "good ways to fund increased investment in our transportation system:"*
  - *Only 3 of the 9 funding sources tested receive majority support – and one of those is a licensing fee on electric vehicles, which most residents won't have to pay.*
  - *A vehicle emissions fee and tolls are the only broader revenue sources with majority support.*

Preferred Revenue Sources

Q28-Q36. Below are some ways we could fund our unmet transportation needs. For each one, please indicate whether or not you think that method is a good way to fund increased investment in our transportation system.



Revenue Sources by RTPO

Q28-Q36. This table shows the revenue sources colored by the percent who think that source is "definitely" or "probably" a good way to fund transportation needs. Green squares indicate 55%+ support, Yellow from 50% to 54% and Red below 50%.

	ALL	B-F-WW	NE WA	N. Centrl	Pa-louse	Penin-sula	PSRC	Quad Co	Skagit Island	Spo-kane	SW RTC	SW RTPO	Thurs-ton	What-com	Ya-kima
Emissions fee	61	42	35	43	48	54	69	39	54	61	65	49	59	51	49
EV licensing	60	59	66	66	59	61	57	58	63	65	68	58	61	54	65
Electronic Tolls	52	45	43	47	49	59	55	51	52	49	38	46	65	40	49
Gas tax	46	39	29	40	36	43	52	26	47	40	43	36	51	44	37
Vehicle value	44	30	28	36	39	40	50	30	43	40	34	34	50	50	42
Fuel efficiency	44	33	26	31	38	34	52	24	35	41	42	27	45	39	37
VMT	44	39	29	38	40	49	46	33	42	47	37	32	44	45	43
Sales tax	30	21	16	18	25	30	34	14	23	27	25	24	38	34	23
Property tax	20	15	8	12	20	17	23	11	17	20	17	13	20	17	28

Most sources are well below a majority across the state.

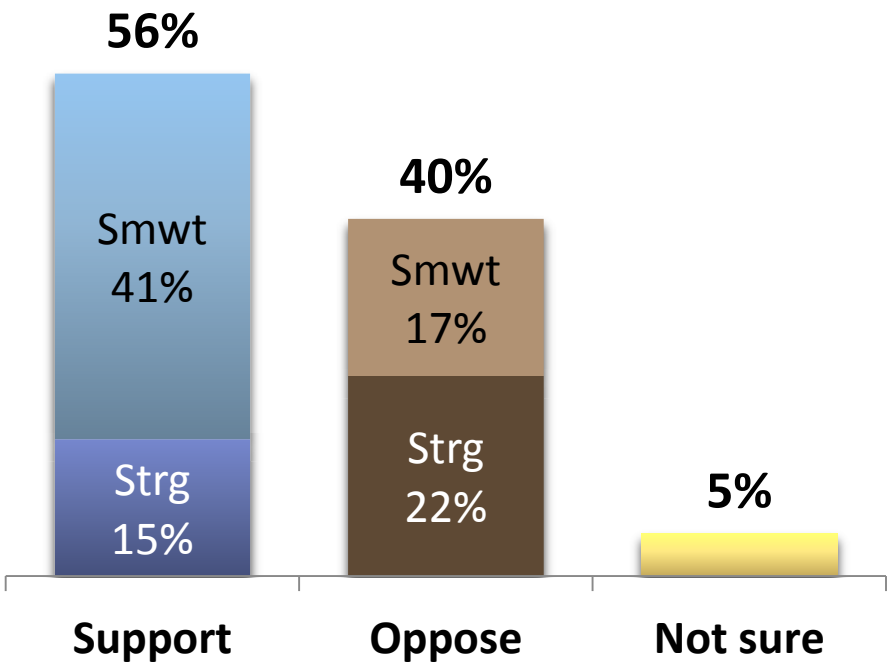
Support for Indexing

- *There is majority support for having transportation fees rise with rate of inflation, but the intensity of support is low (15% strongly support).*
  - *Indexing fees has strong majority support in Urban and Suburban areas, but residents in Rural areas are divided.*
- *A strong majority of residents oppose indexing the gas tax to inflation.*
  - *A majority of residents in every RTPO oppose indexing the gas tax.*

Adjusting Fees/Taxes with Inflation

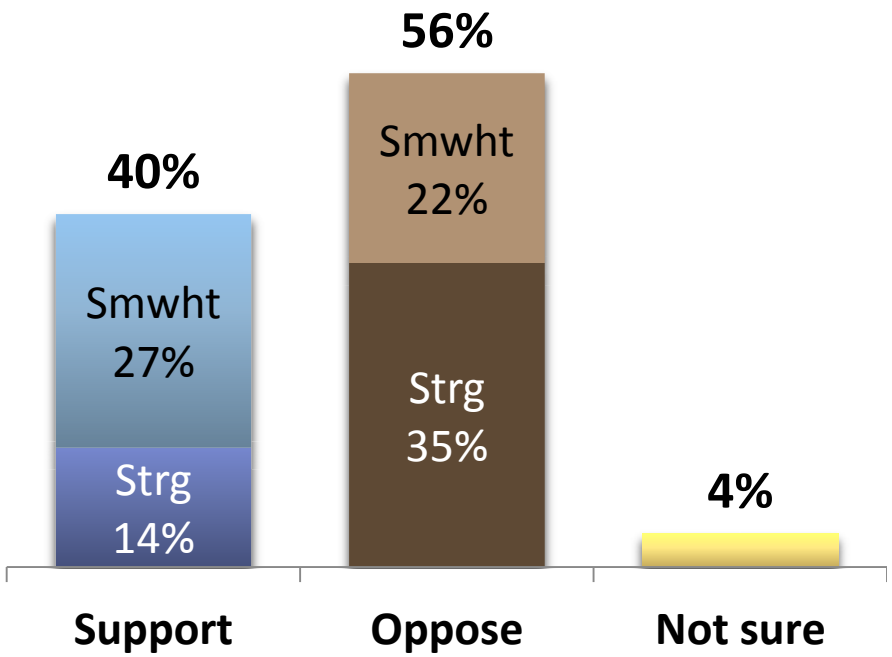
Q37. Transportation fees like vehicle licenses, permits and other fees are fixed amounts and do not change with inflation. This means that even as transportation costs increase, these fees stay flat creating funding challenges for key transportation programs like law enforcement, traffic safety and aviation. In general, would you support or oppose having these transportation fees rise with rate of inflation, so that they provide a more stable funding source?

Q37. Support for Indexing Fees

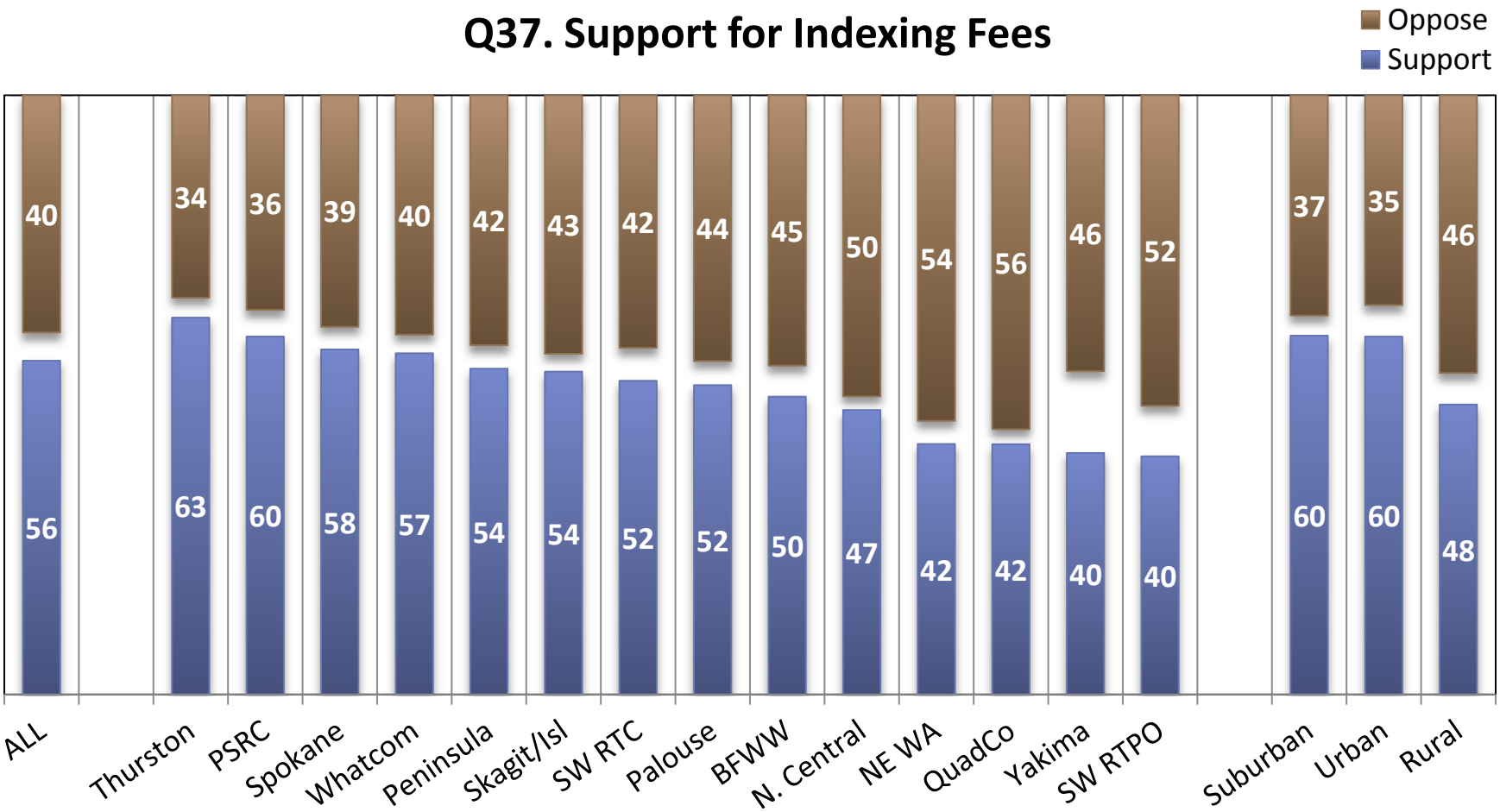


Q38. A combination of inflation, changing driving habits and increased fuel economy of vehicles means the state gas tax brings in less money each year. This creates a growing transportation funding shortfall. In general, would you support or oppose having the gas tax rise with the rate of inflation so that it provides a more stable funding source?

Q38. Support for Indexing the Gas Tax



Indexed Fees by RTPO



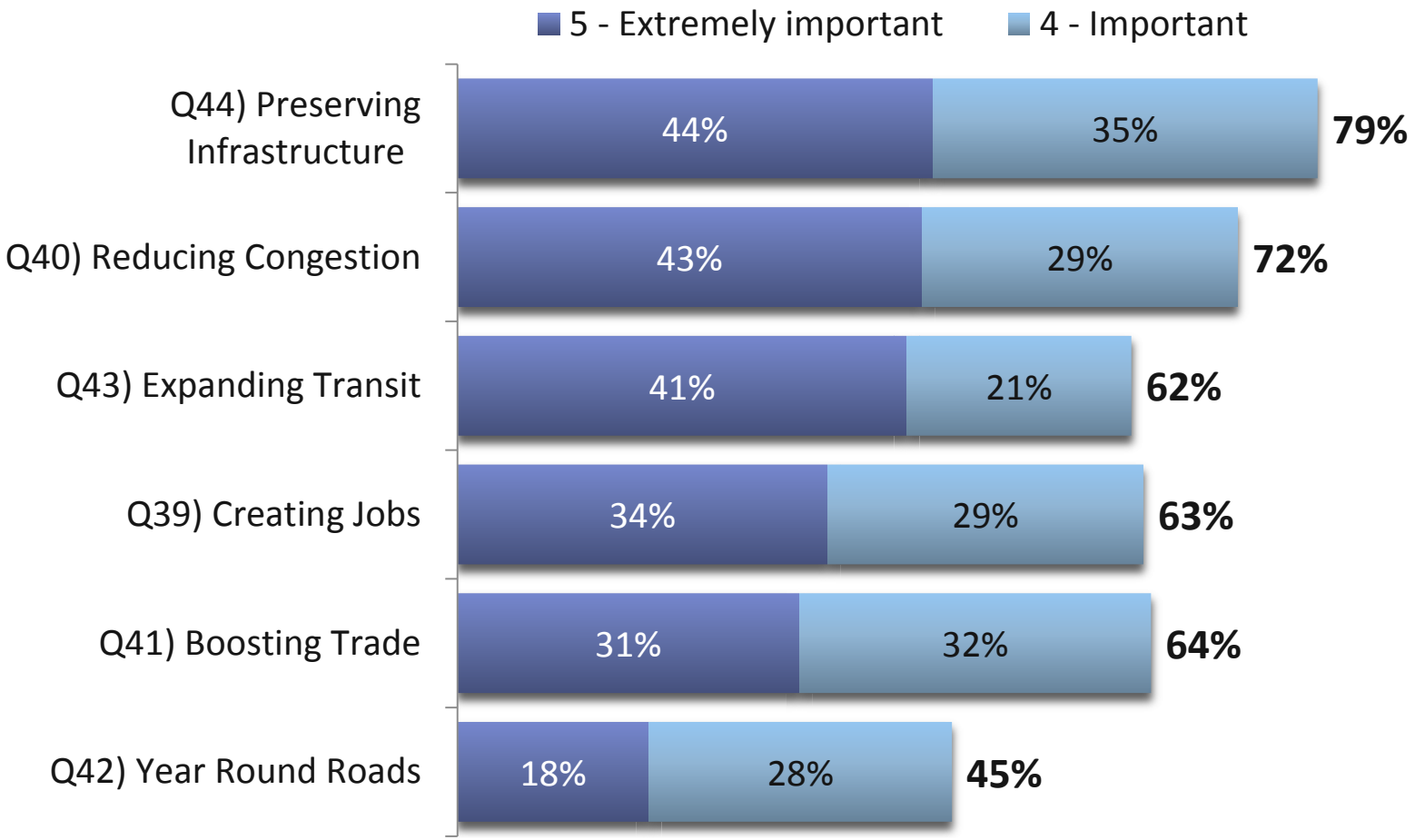
Majority support in 8 of 14 RTPOs – strong support in Urban, Suburban.

Benefits of Increased Investment

- *Respondent were asked to rate six different messages about benefits that come from increased long term investments in our transportation system:*
  - *All of the messages except "year round roads" test well with a strong majority of residents.*
  - *The "preservation message" which specifically talks about the idea of "investing now [so] we can extend the life of our roads, bridges, transit, and ferries and keep them safe" is particularly effective.*
  - *Reducing congestion and expanding transit are also strong messages with good intensity.*
  - *The economic arguments (creating jobs and boosting trade) are effective overall but have lower intensity.*

Benefits Messages

Q39-Q44. There are a number of benefits that come from increased long term investments in our transportation system. For each of the following, please indicate how important that benefit is to you in terms of justifying additional taxes to fund new investments in our transportation system.



Benefit Messages by RTPO

Q39-Q44. This table shows the 6 benefits messages ranked by importance using color – green squares indicate the most important messages followed by yellow, and then red for the lowest rated. Scanning the table for green squares indicates which messages are most important in each RTPO.

	ALL	B-F-WW	NE WA	N. Centrl	Pa-louse	Penin-sula	PSRC	Quad Co	Skagit Island	Spo-kane	SW RTC	SW RTPO	Thurs-ton	What-com	Ya-kima
Preserving infrastructure	79	74	74	80	74	76	82	73	79	79	74	70	79	73	73
Reducing congestion	72	56	41	58	53	65	81	53	63	55	73	56	75	59	64
Boosting trade	64	66	53	65	62	66	64	64	56	65	64	63	60	61	69
Creating jobs	63	58	51	60	59	67	65	58	56	63	65	60	57	62	60
Expanding transit	62	47	41	55	50	63	72	45	57	44	45	46	61	64	49
Year-round roads	45	52	68	73	57	47	41	60	41	56	43	50	35	39	63

Preserving infrastructure strong across the state – transit, year round roads are regional.

Tolling

Tolling

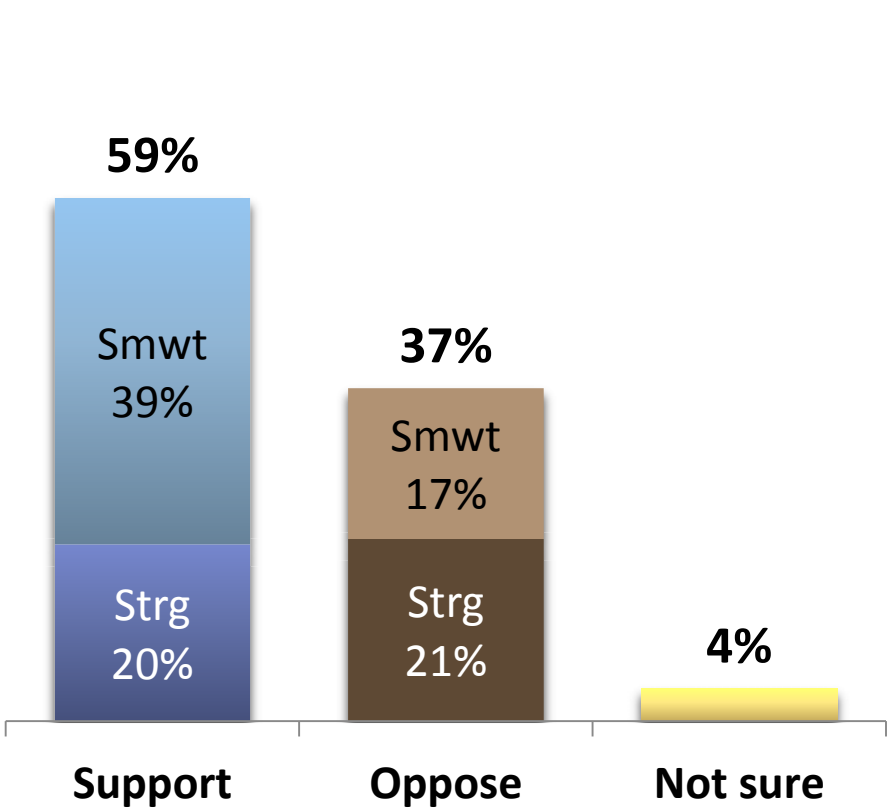
- *Tolling has solid support across the state, even among more frequent drivers.*
- *Variable tolls and Express Toll Lanes also have majority support.*
- *In most RTPOs residents support the use of toll revenue for the entire travel corridor rather than for just the specific facility where the toll is collected.*

Support for Tolling

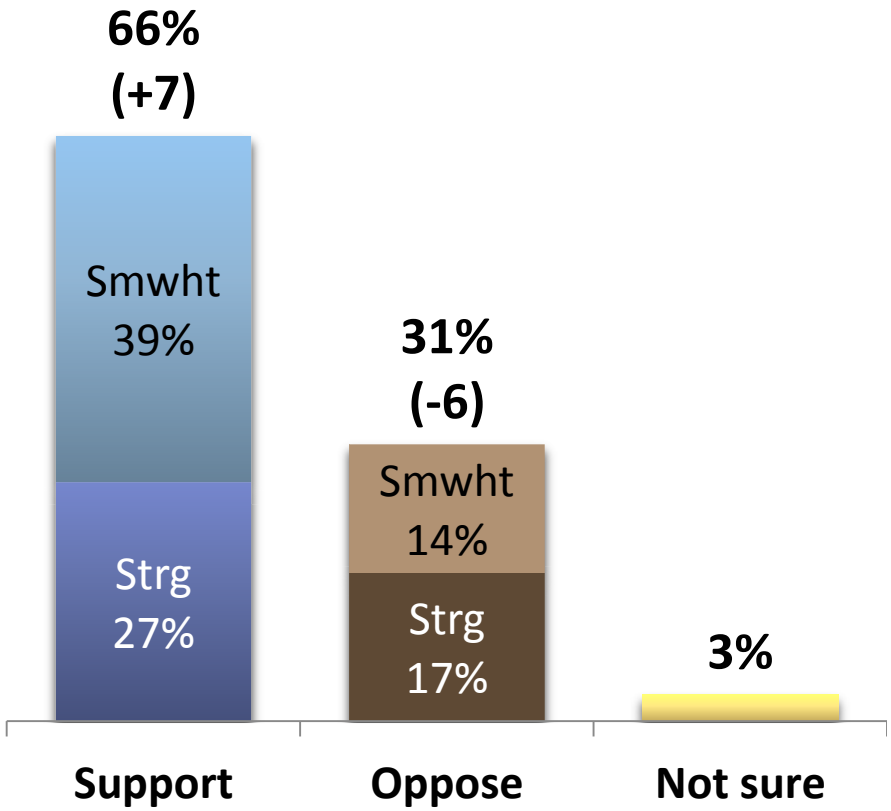
Q47. In general, do you support or oppose tolling as a way to help pay for major state transportation projects?

Q48. One argument for using tolls to help pay for major state projects is that those who use and benefit the most from a project pay a bigger share of the cost. That means that less money is required from the rest of the state.

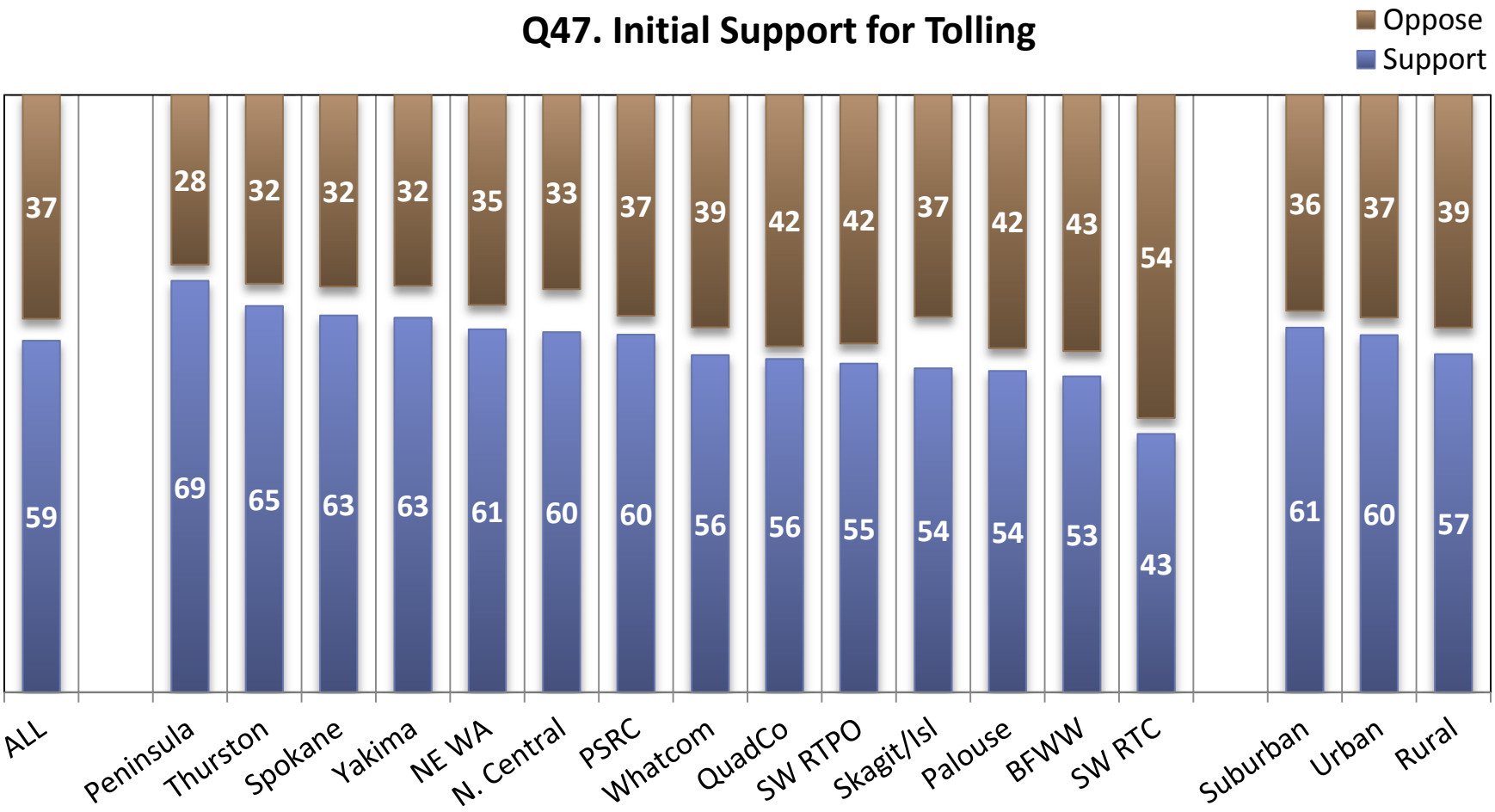
Q47. Initial Support



Q48. Informed Support

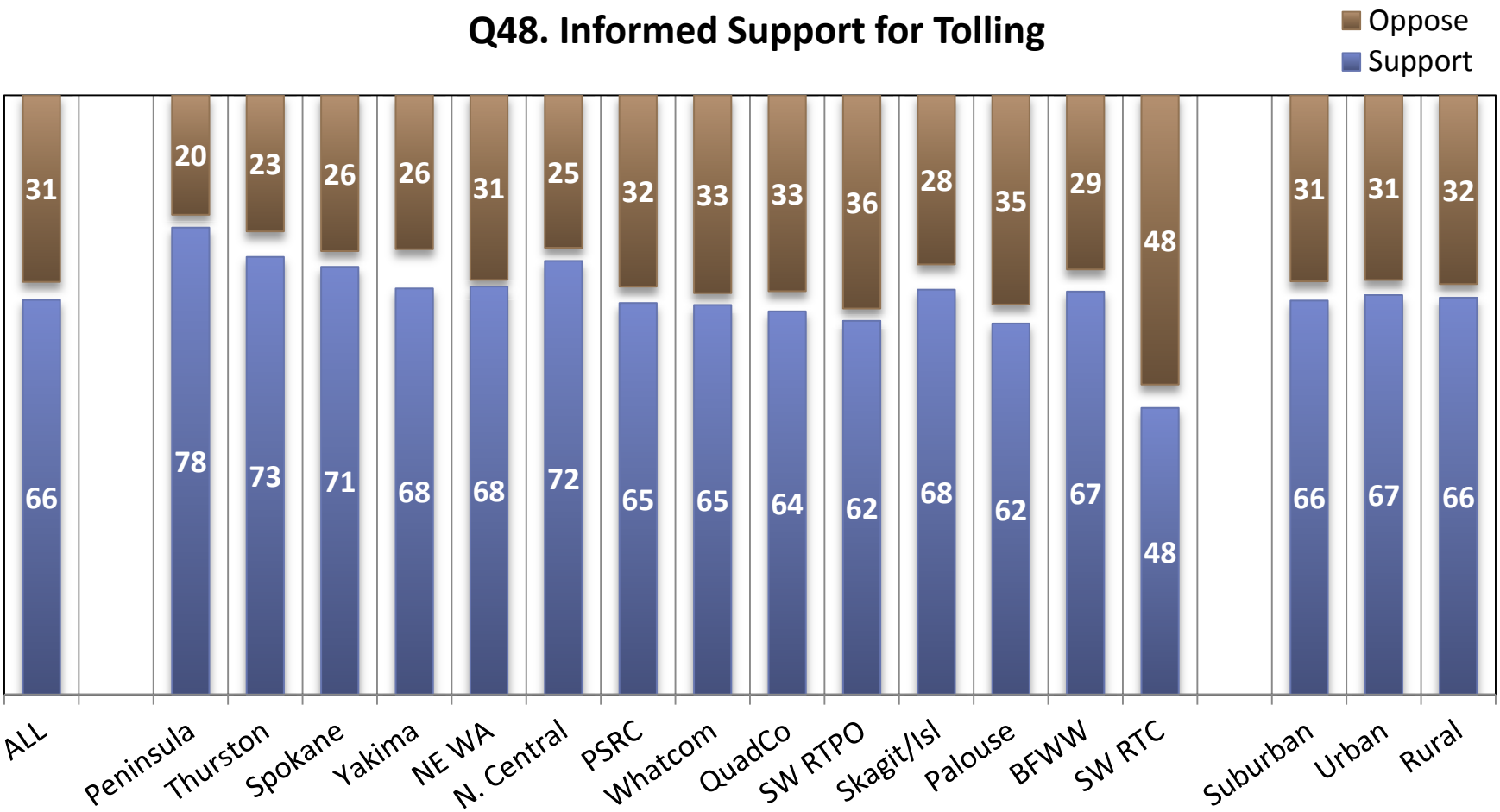


Initial Support for Tolling by RTPO



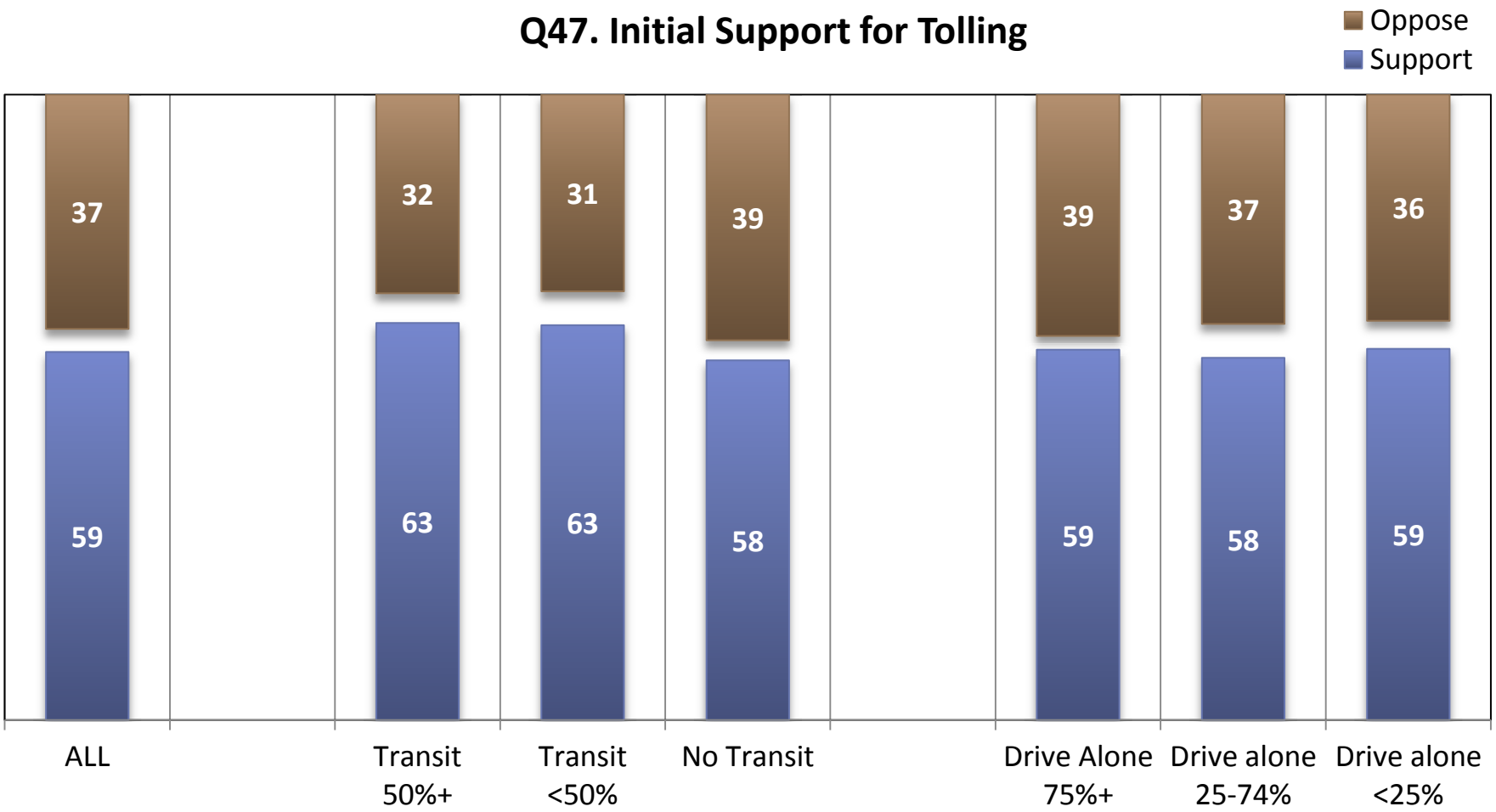
Majority support in 13 of 14 RTPOs – consistent in Urban, Suburban, Rural.

Informed Support for Tolling by RTPO



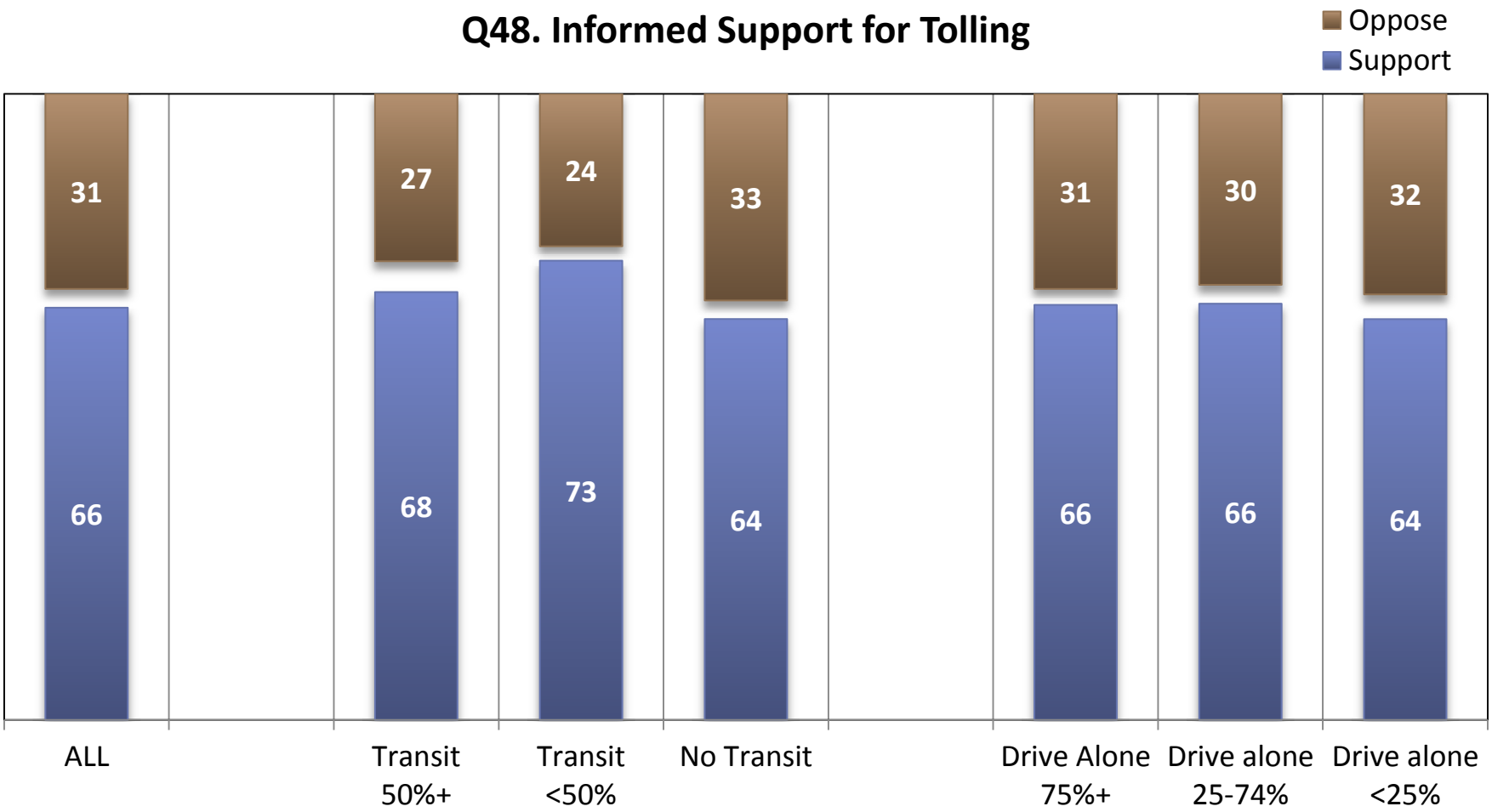
Support increases in all 14 RTPOs – consistent in Urban, Suburban, Rural.

Initial Support for Tolling by Travel



Consistent support across even among more frequent drivers.

Informed Support for Tolling by Travel



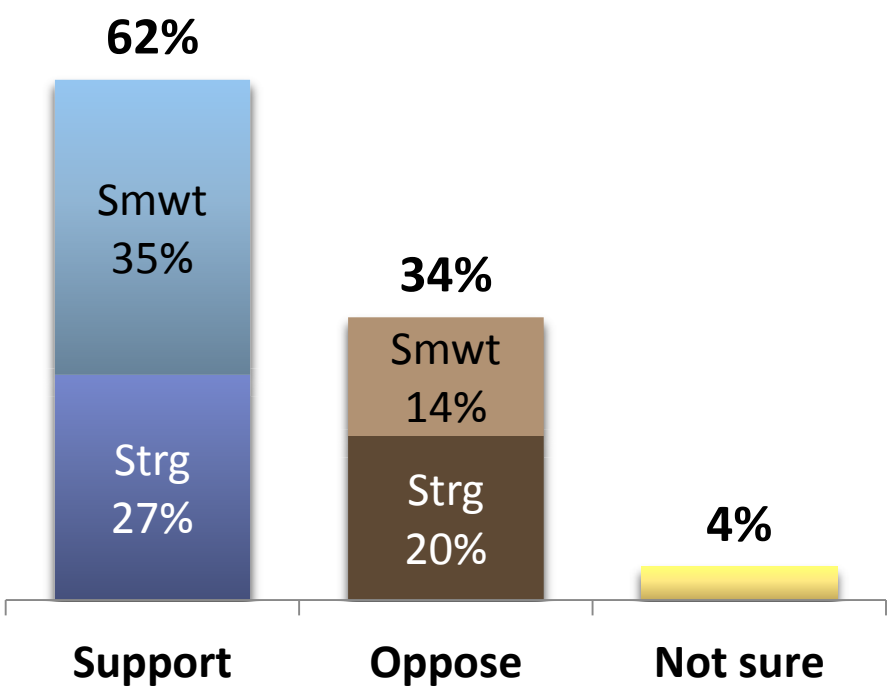
Strong increases across the board.

Support for Variable Toll/HOT Lanes

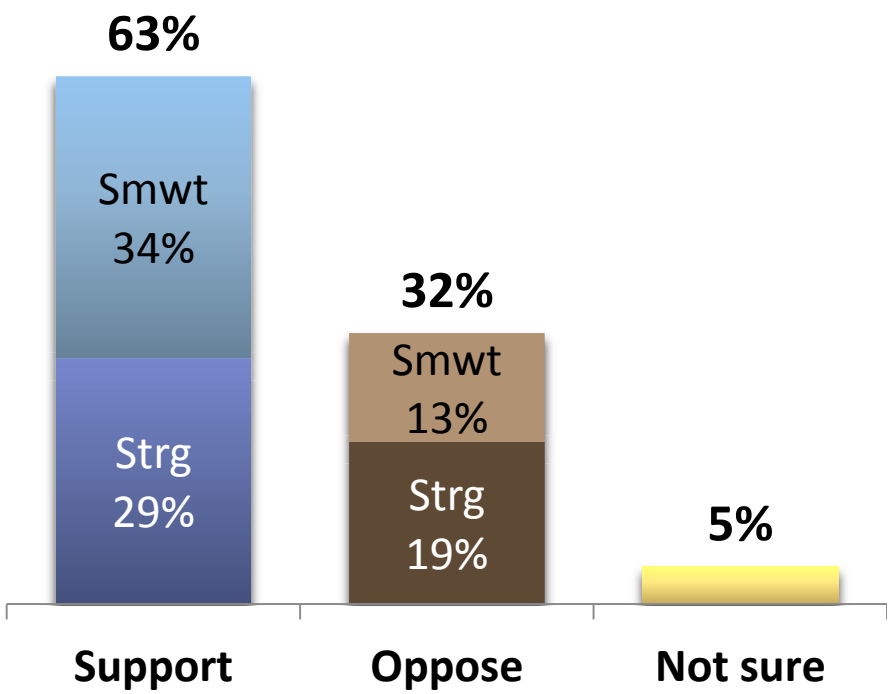
Q49. Tolls that change based on traffic volumes or time of day and day of week are known as variable tolls. Variable tolls help reduce congestion by encouraging people to shift optional trips to less busy times of the day, thus reducing congestion during the busiest times of the day. The idea is similar to the way movie theaters charge less for matinees to get people to come to the theater at less busy times.

Q50. Express Toll Lanes, also referred to as High Occupancy Toll (HOT) lanes, allow people traveling alone to pay a toll to use the High Occupancy Vehicle (HOV) lanes. The toll amount changes based on traffic flow so that the HOV lane doesn't slow down.

Q49. Variable Tolls



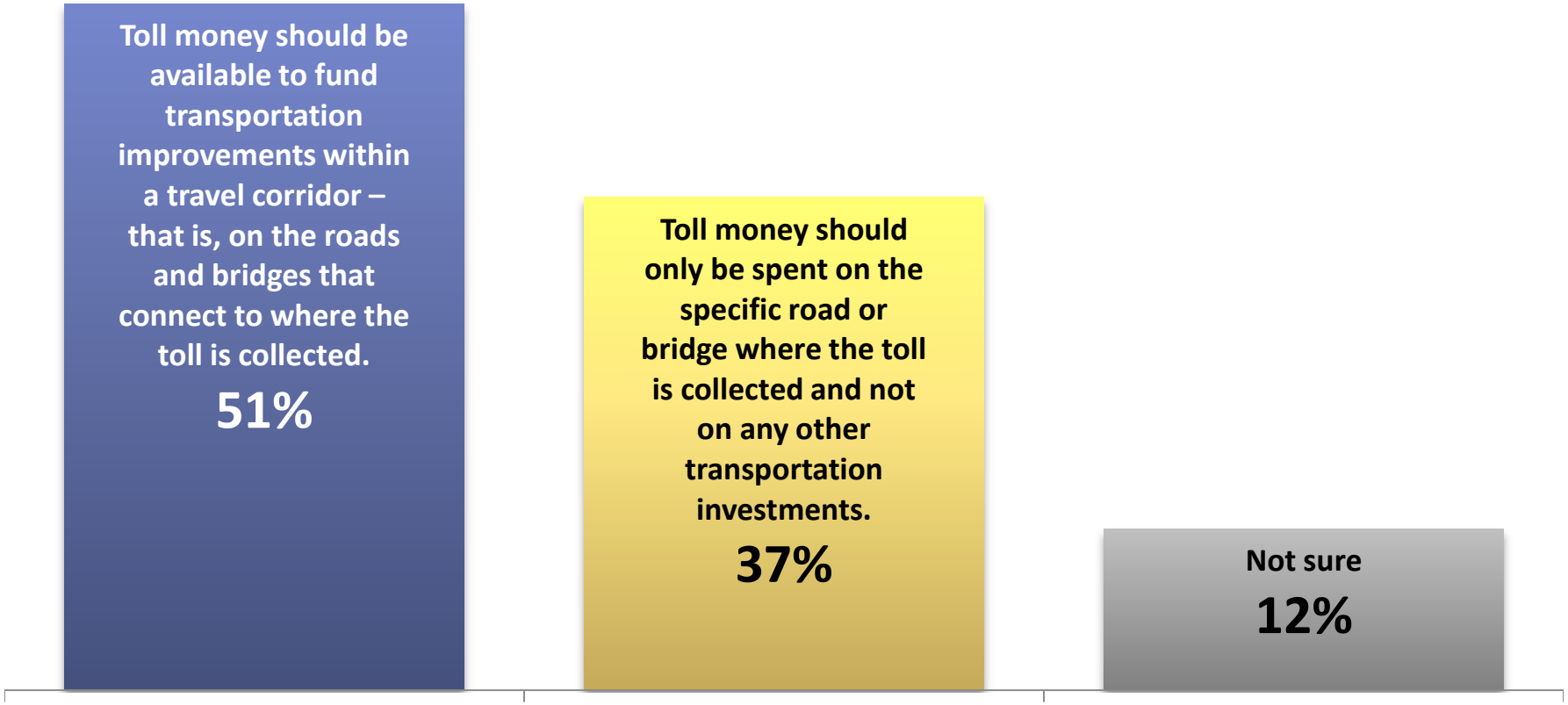
Q50. Express Toll Lanes



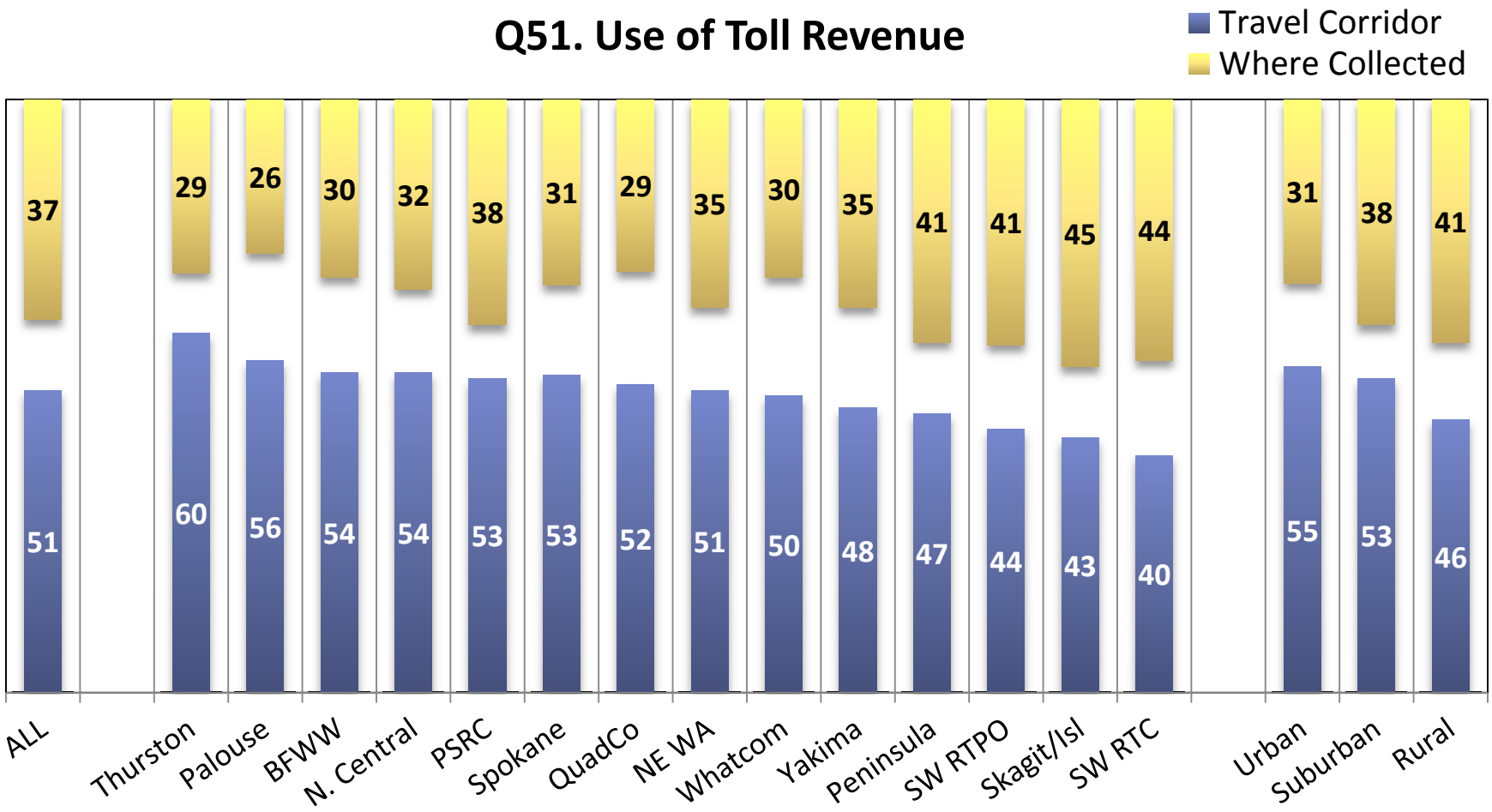
Use of Toll Revenue

Q51. Which of the following statements is closest to your opinion:

Q51. Use of Toll Revenue

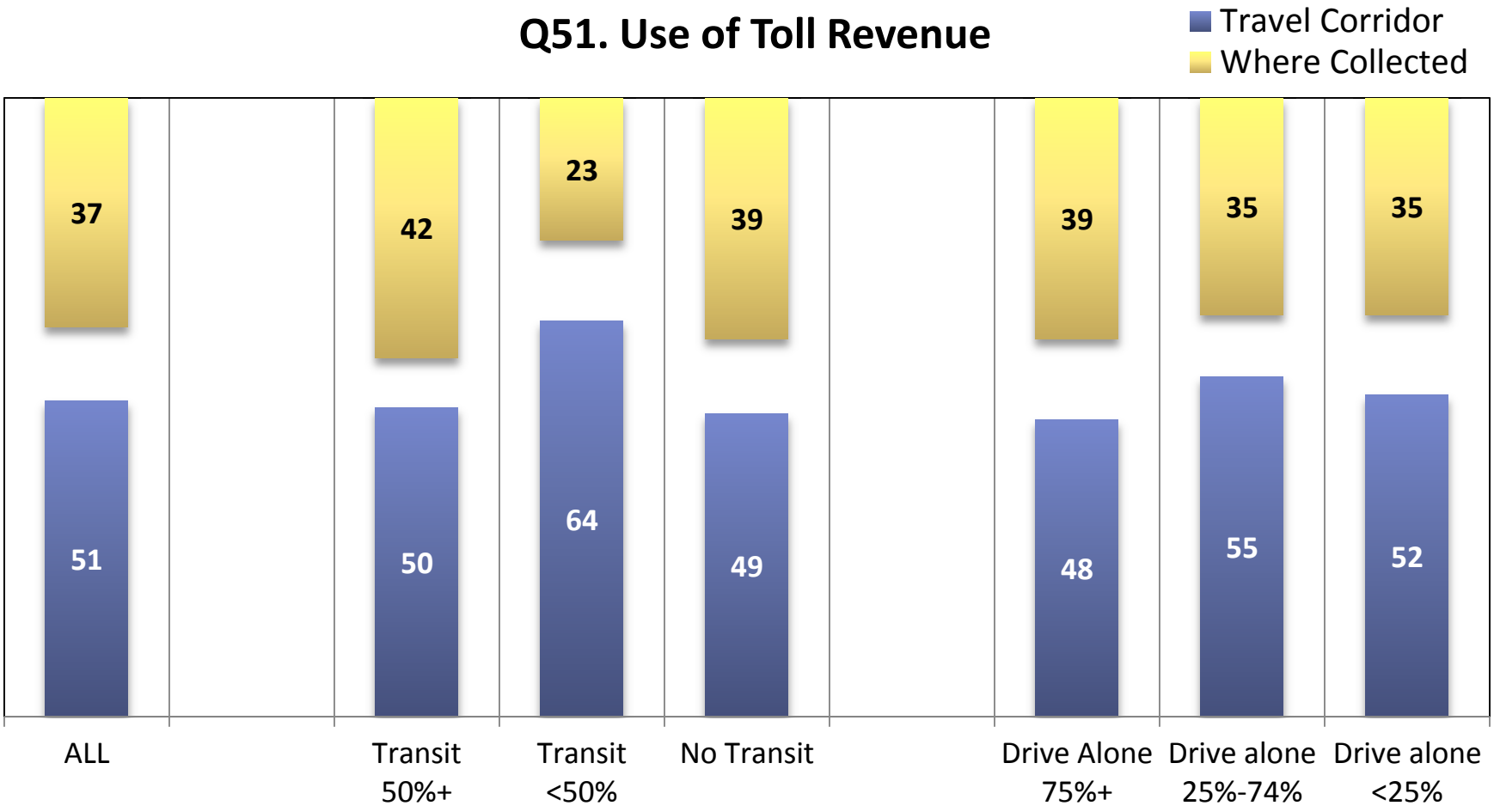


Facility vs. Corridor by RTPO



Net support for Corridor 12 of 14 RTPOs – strong preference in Urban/Suburban.

Facility vs. Corridor by RTPO



Even regular drivers favor Corridor.

Transit, Passenger Rail and State Ferries

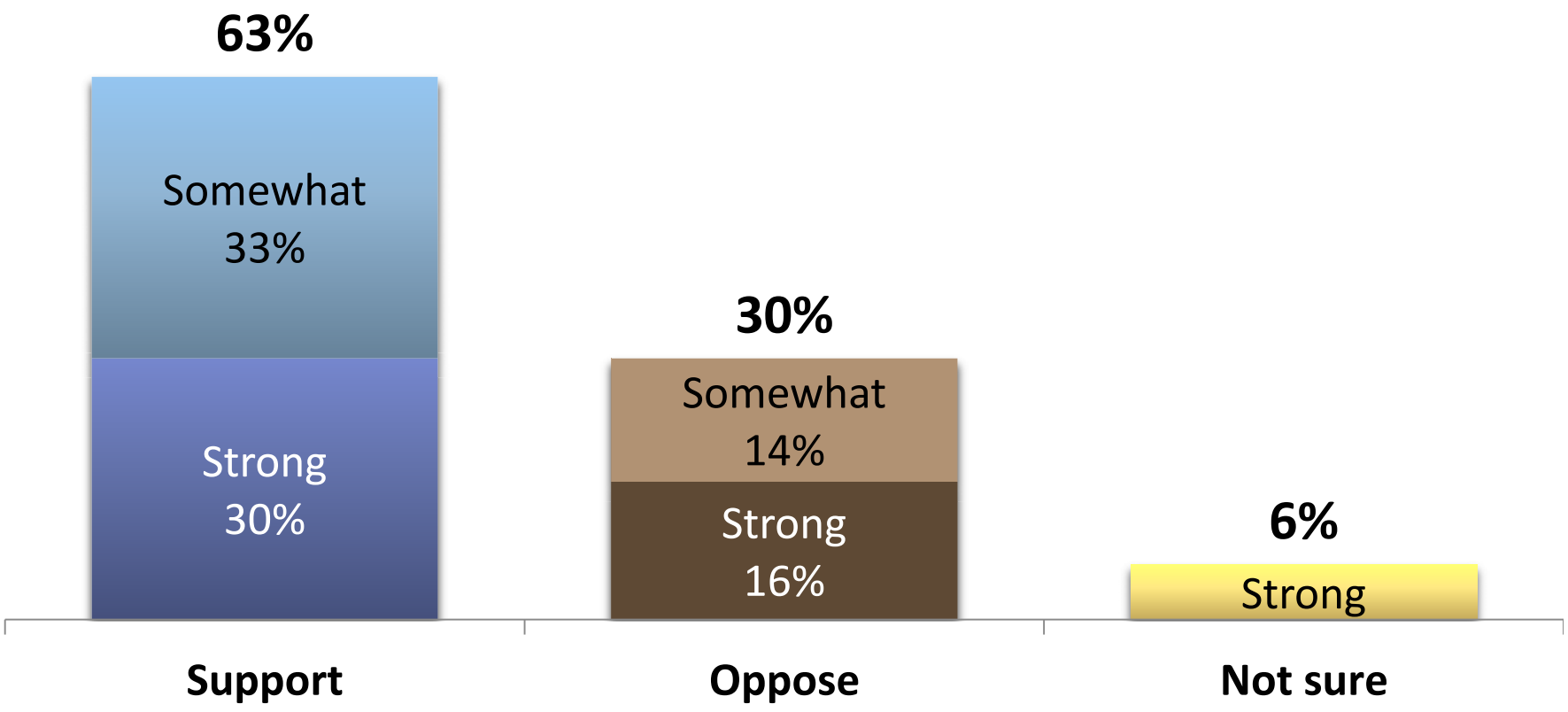
Transit & Passenger Rail

- *Support for "providing more state funding for public transit and passenger rail" is strong in most of the state.*
  - *Support is roughly 50% or higher in 13 of the 14 RTPOs.*
  - *Support is 60% or higher in half of the RTPOs.*
  - *Support is extremely strong in urban and suburban areas and is a majority in rural areas.*
  - *Even heavy drivers give more state transit funding majority support.*

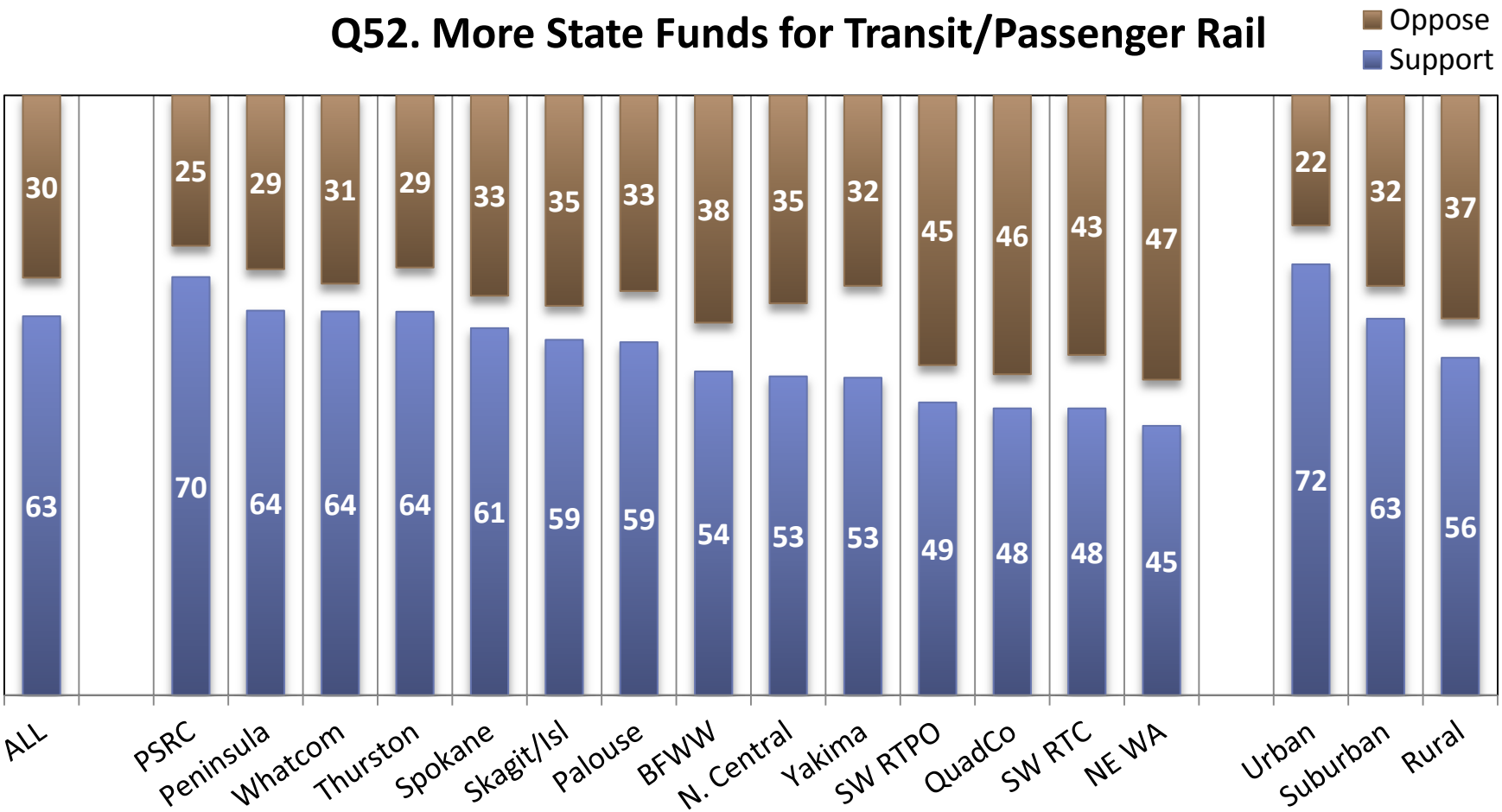
State Funds for Transit & Rail

Q52. The state primarily provides funding for state highways, bridges, & the ferry system, as well as providing funding to cities & counties for transportation needs. Local jurisdictions and the federal government provide most of the funding for transit. Do you support or oppose providing more state funding for public transit and passenger rail?

Q52. More State Funds for Transit/Passenger Rail

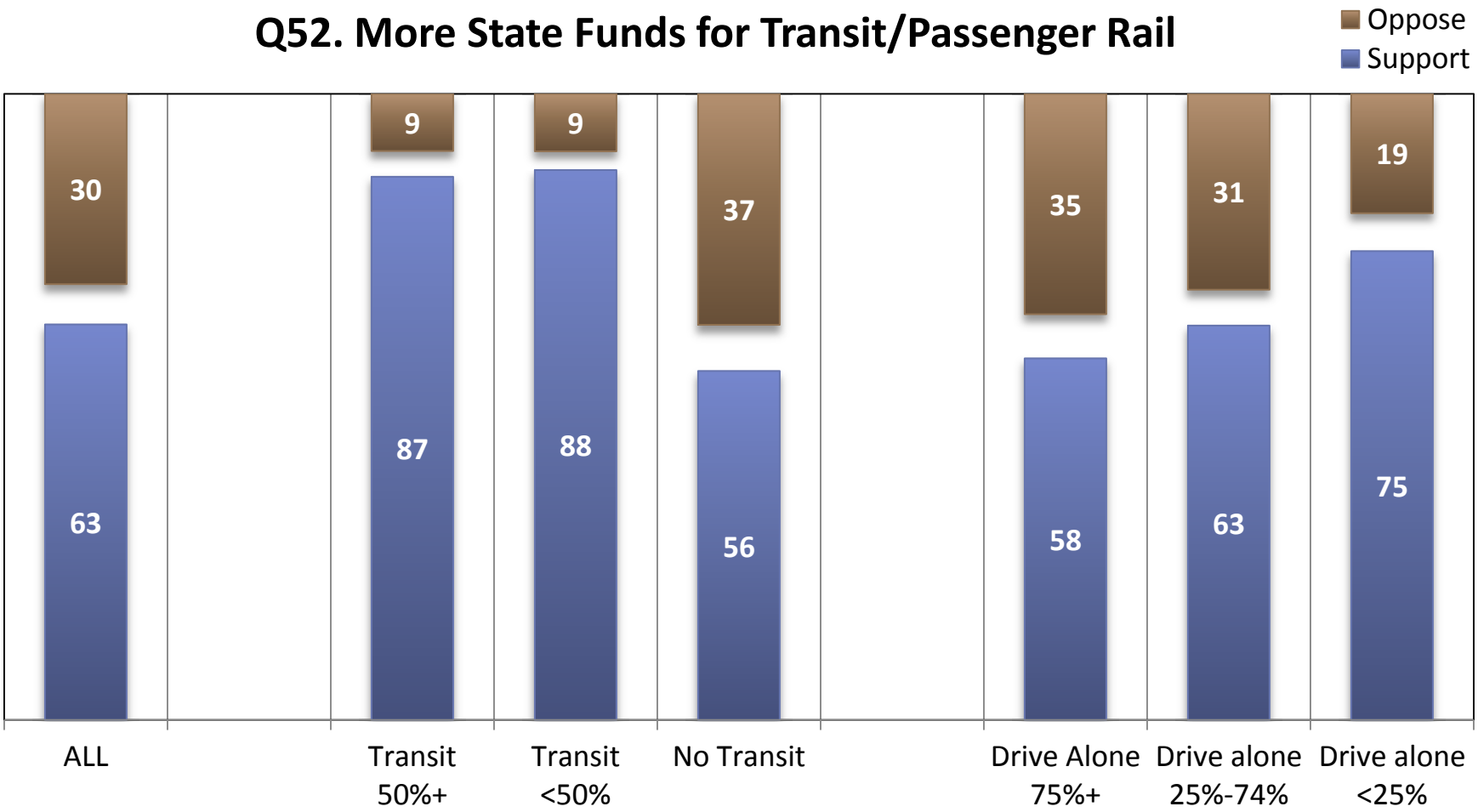


Transit Funding by RTPO



Majority support in 12 of 14 RTPOs -- strongest in Urban areas.

Transit Funding by Travel Habits



Majority support even among more frequent drivers.

Ferries

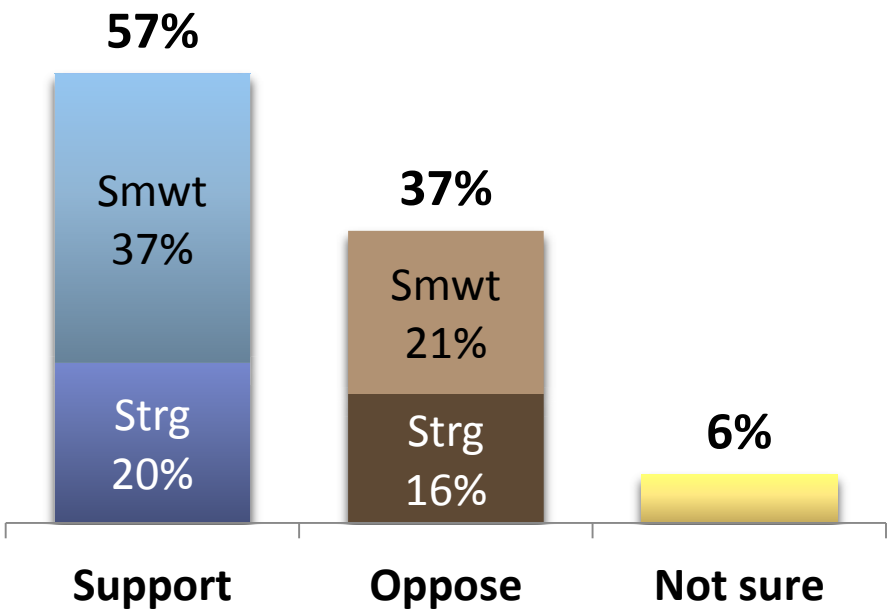
- *There is also strong support for "using state transportation funds to help maintain and operate the Washington State Ferry system," although initially, overall support is primarily driven by strong support in the ferry RTPOs (Peninsula, Skagit/Island, PSRC and Whatcom).*
  - *Initially, 6 of the 14 RTPOs give majority support to state ferry funding.*
  - *After hearing about how the system is funded and operated, there is majority support in 11 of the 14 RTPOs and support is net positive in every RTPO.*

State Funding for Ferries

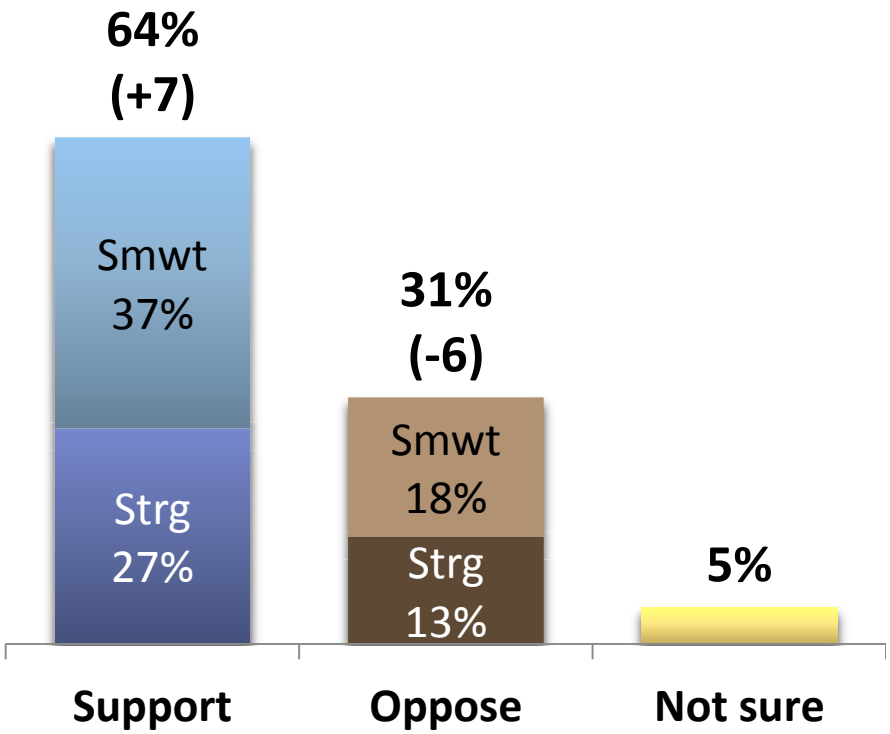
Q53. State gas tax revenues also help fund the Washington State Ferry system. Do you support or oppose using state transportation funds to help maintain and operate the Washington State Ferry system?

Q54. Washington State ferries carry 23 million passengers a year and are part of the state highway system just like bridges or highways. Ferry users pay about 70% of the ferry's operational costs and state tax revenues provide the other 30%. The state also fully funds the capital needs of the ferry system, such as buying new boats and making ferry terminal improvements. Knowing this, do you support or oppose using state funds to help maintain and operate the WA State Ferry system?

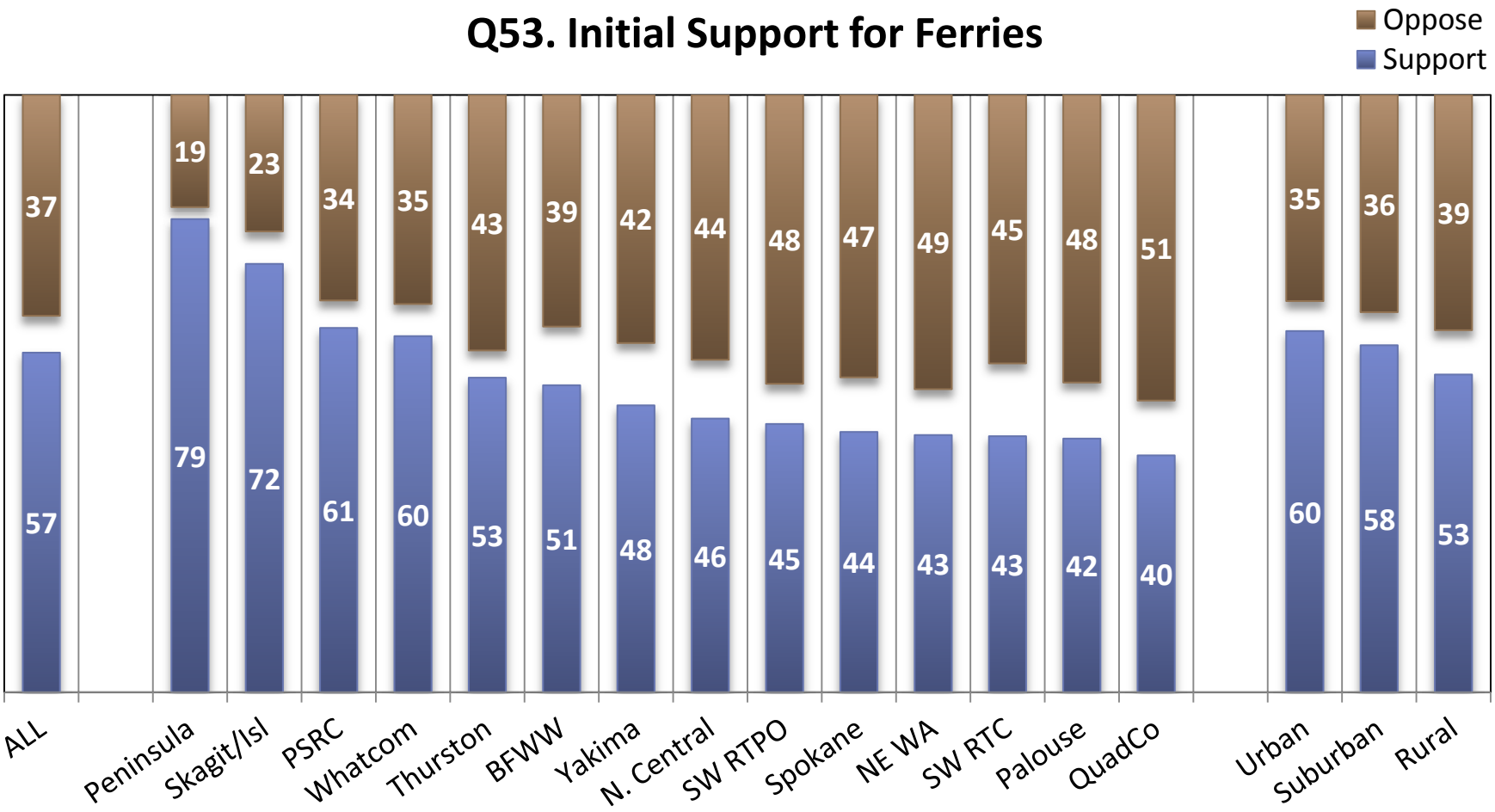
Q53. Initial Support



Q54. Informed Support

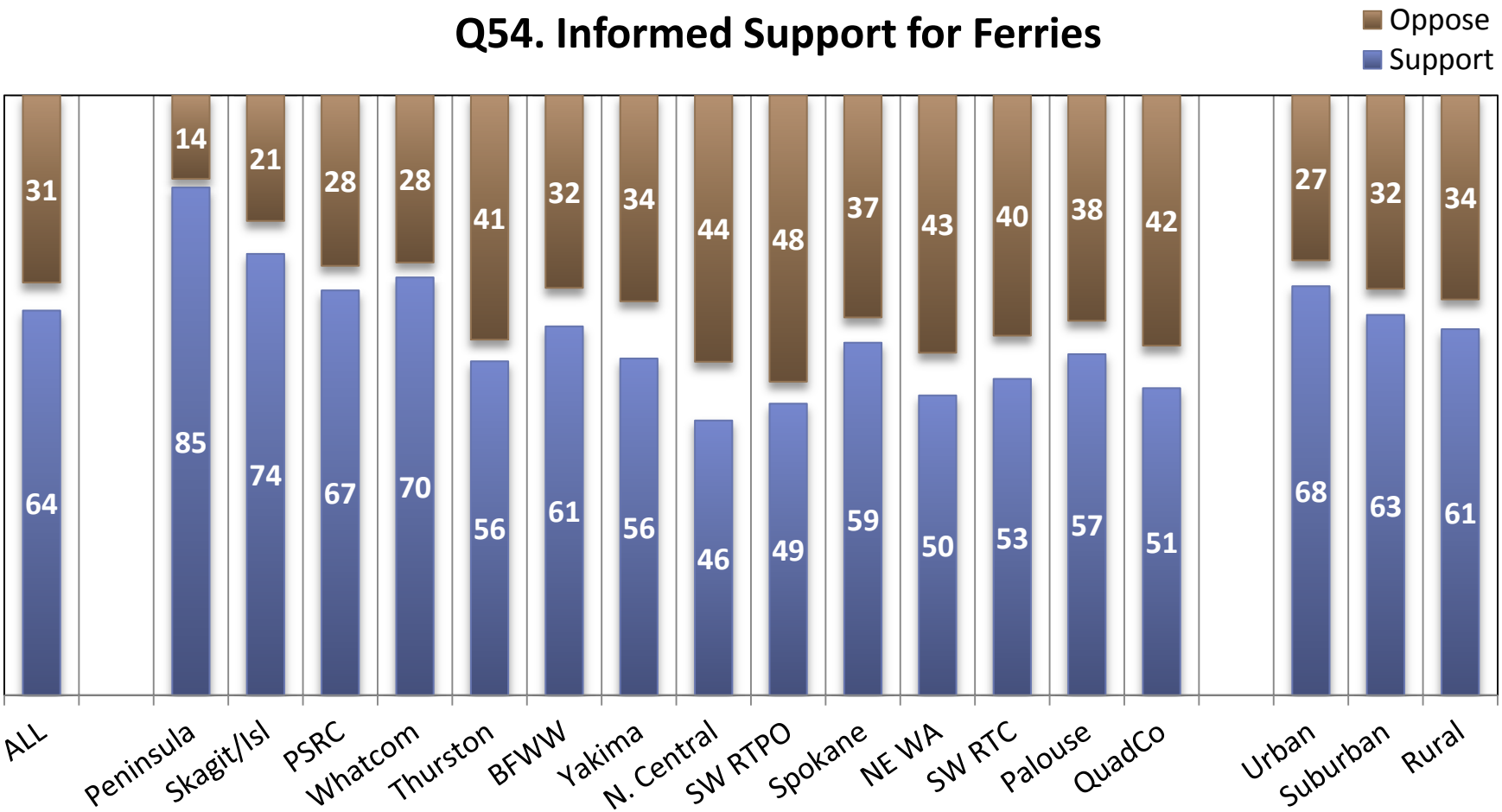


Initial Ferry Support by RTPO



Majority support in 6 of 14 RTPOs – overall support driven by ferry RTPOs.

Informed Ferry Support by RTPO



Majority support in 11 of 14 RTPOs – strong increase in most non-ferry RTPOs.

Contact Info

THANK YOU!

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