2012 Statewide VOWS Panel Transportation Survey

Report of Findings

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Research Overview

Goal

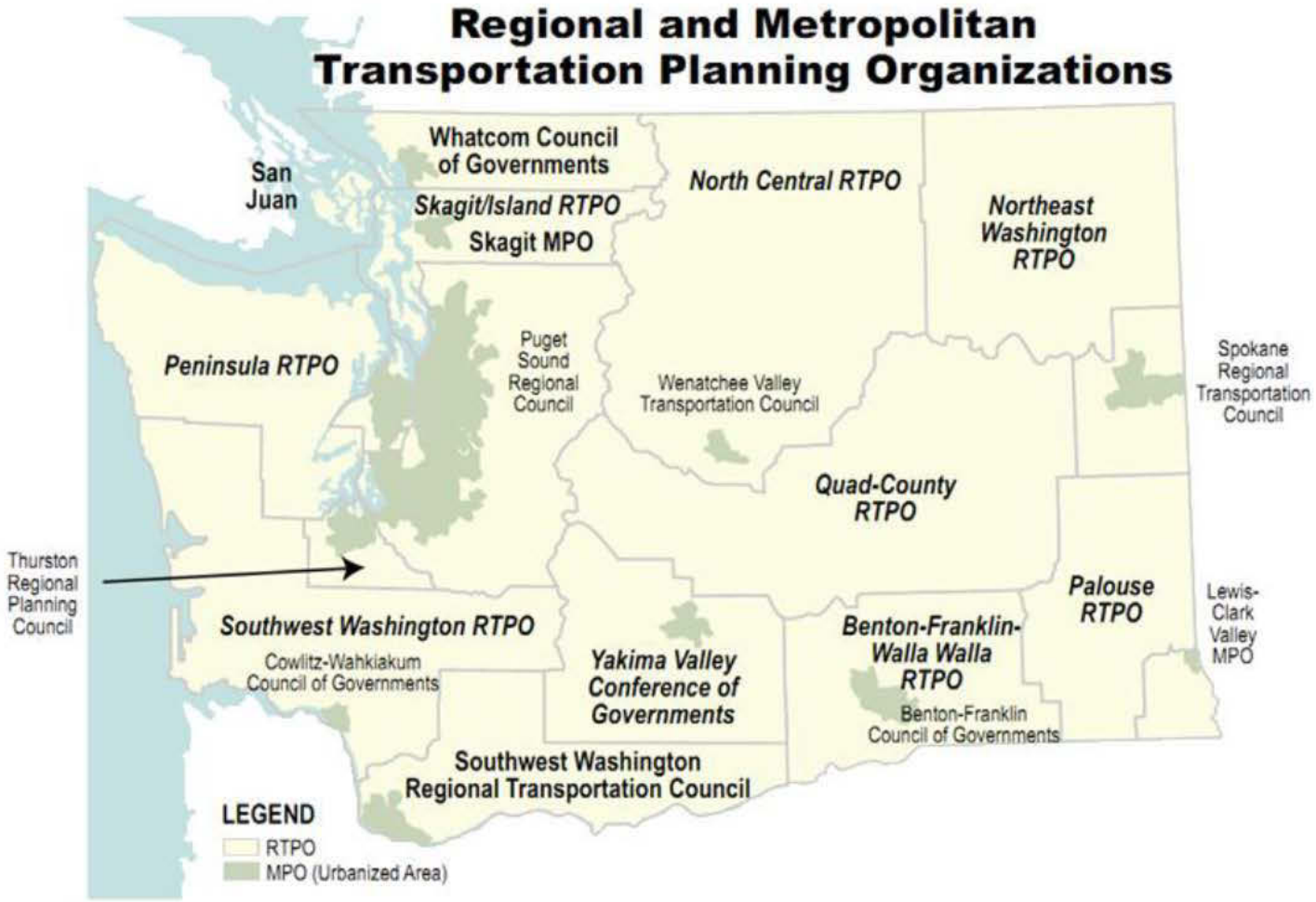
To provide the Washington State Transportation Commission, the Governor, and the Legislature with clear and accurate data regarding:

- *voters' general attitudes about the transportation system and transportation spending and revenue,*
- *how information about transportation funding needs and revenue options affects voters' preferences around transportation spending and funding.*

Approach

- ✓ Reach out by email to 28-30,000 Voice of Washington State (VOWS) panel members to invite them to participate in an online transportation survey.
- ✓ Structure the results based on the state's 14 Regional Transportation Planning Organizations .
- ✓ Reach at least 10,000 people. Overall over 13,000 people followed the survey link in the email invitation and almost 8,000 people finished the survey:
  - 13,396 people clicked the survey link in the email to view the questionnaire
  - 10,318 people started the survey and completed one or more questions
  - 7,896 people completed the entire survey by the December 20th deadline
  - 419 people completed the survey after the deadline and were not included in the data set

Regional Transportation Planning Organizations



- PSRC (King, Pierce and Snohomish), makes up **51% of the state**.
- San Juan County is not part of any RTPO, and was included in Island/ Skagit RTPO.
- Kitsap County is a member of PSRC and Peninsula. For this study, Kitsap is only included in the Peninsula RTPO.

Methodology

- A total of 7,897 valid statewide interviews were completed between December 6th and December 20th, 2012.
- The Margin of Error for the overall results is ±1.1 percentage points at the 95% confidence interval.
- The survey results were weighted by RTPO and other key demographics to reflect the statewide voter population based on current voter information.
- Although some comparisons are made to the 2011 WSTC survey, it should be noted that the methodology and sample universe of the two surveys was different:
  - In 2011, an Addressed Based Sampling (ABS) methodology was used. Postcard invitations were sent to 100,000 random households in Washington state inviting respondents to complete the survey online or by phone. This survey is representative of **adults age 18+** in Washington State.
  - In 2012, the survey was conducted by inviting previously recruited VOWS panel members to participate in the online survey. This survey is representative of **registered voters** in Washington State.

Surveys Completed by RTPO

RTPO	Completes	Margin of Error	% of State (weighted to Voter Population)
Benton/Franklin/Walla Walla	281	±5.8%	4.6%
NE Washington	59	±12.8%	0.9%
North Central RTPO	119	±9.0%	2.3%
Palouse	91	±10.3%	1.2%
Peninsula RTPO	1,110	±2.9%	6.0%
Puget Sound Regional Council (**excludes** Kitsap)	3,495	±1.7%	50.8%
QuadCo	124	±8.8%	2.3%
Skagit/Island (**plus** San Juan)	988	±3.1%	3.0%
Spokane	385	±5.0%	6.8%
SW Washington RT Council	415	±4.8%	6.7%
SW Washington RTPO	218	±6.6%	3.9%
Thurston	201	±6.9%	3.7%
Whatcom	169	±7.5%	2.9%
Yakima Valley Conf. of Governments	147	±8.1%	3.5%
TOTAL	**7,896**	**±1.1%**	**100.0%**

Overall Attitudes about the Washington's Transportation System

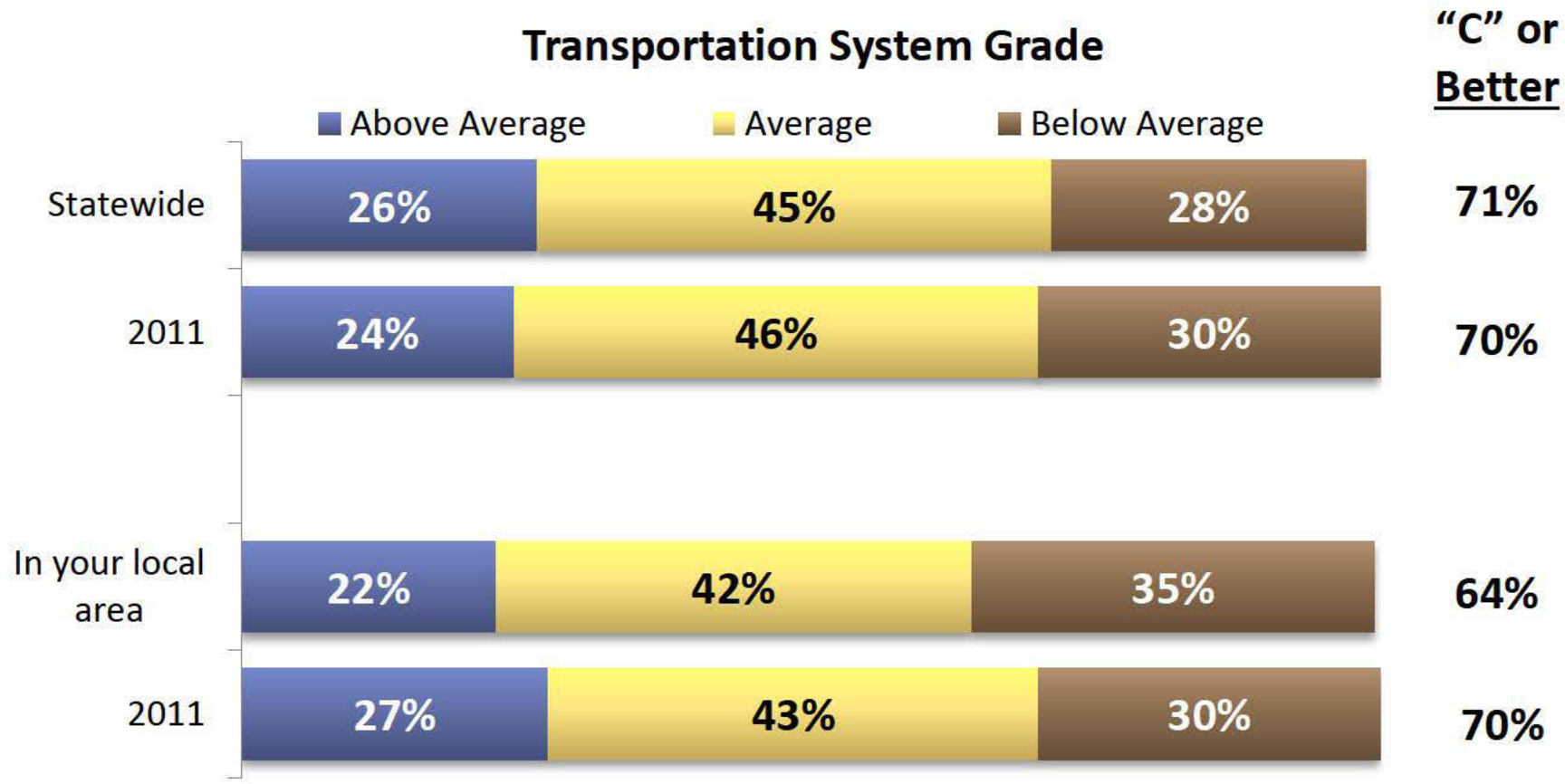
Grading the Transportation System

- *Most voters give the state transportation system a "C" or better grade. Very few give the system excellent ("A") or failing grades ("F"). Most voters also grade their local transportation system as average or above.*
- *Ratings are very similar to the 2011 survey among adult residents.*
- *Voters in most RTPOs give the state a "C" or better grade for transportation funding fairness. Overall, grades for fairness have declined since 2011.*
- *Voters in rural areas are much more likely to give the state a below average grade for funding fairness. Voters in Spokane and Yakima are the least satisfied.*

Grading State / Local Transportation System

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

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



Statewide

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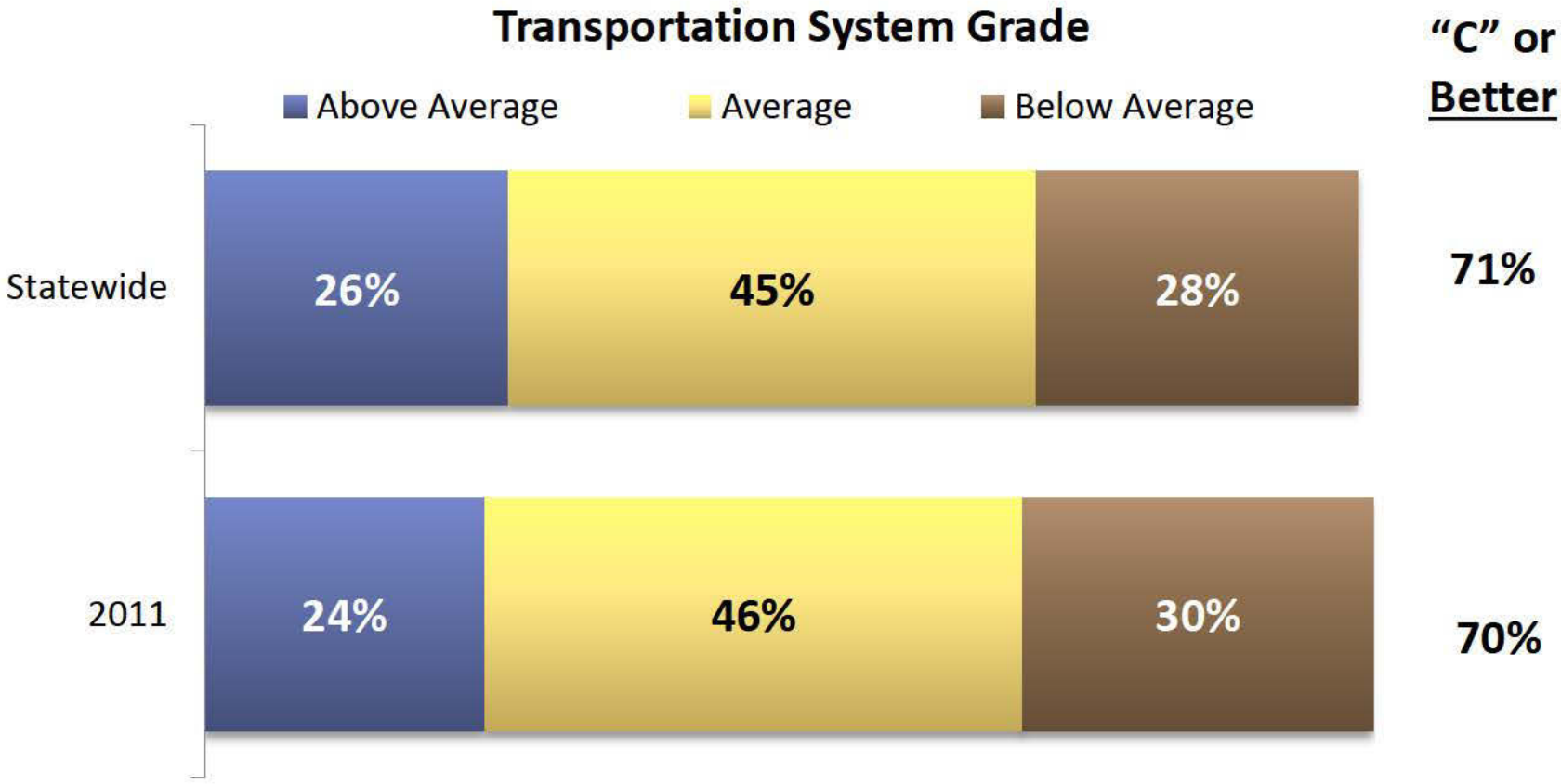

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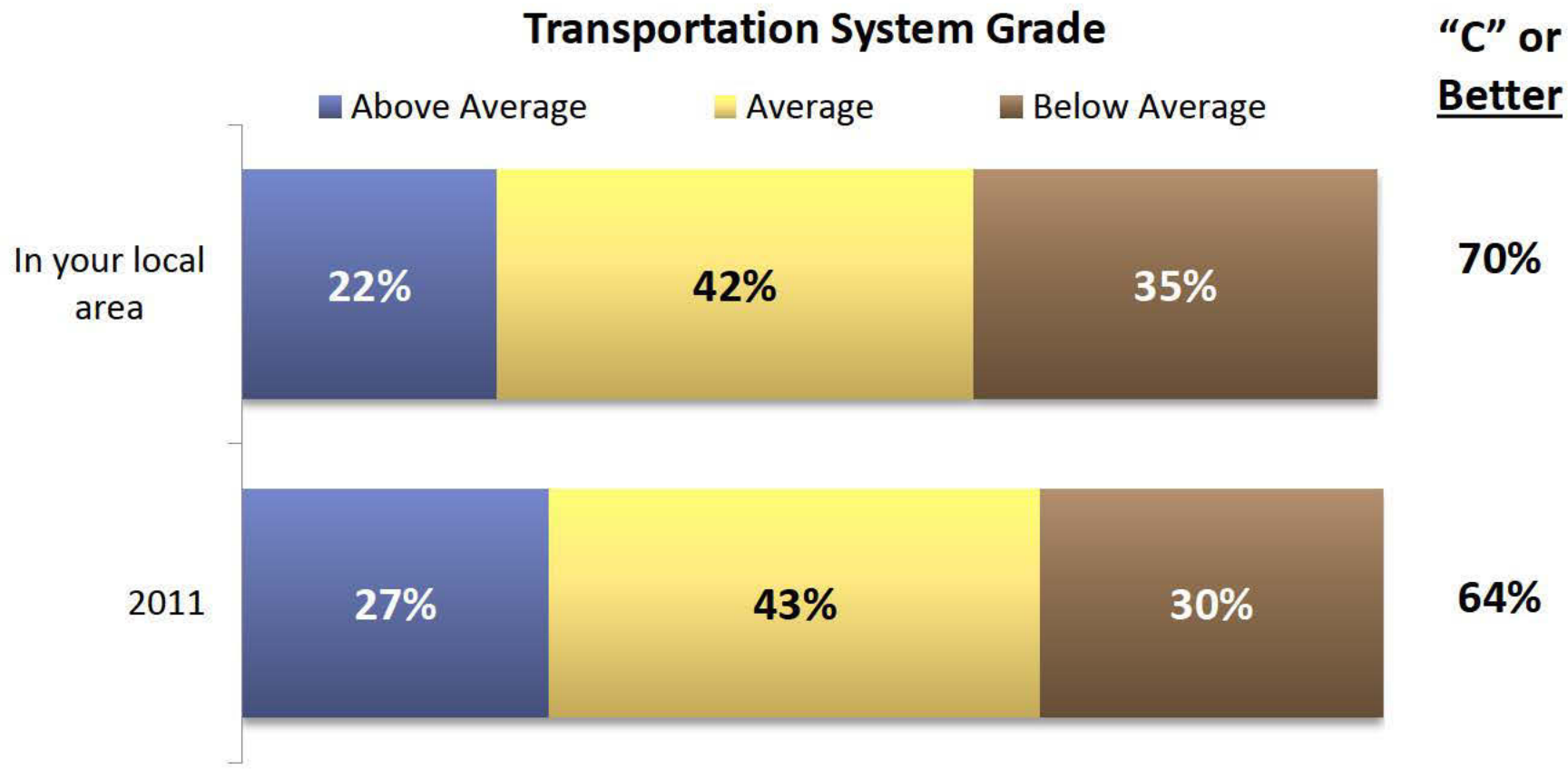
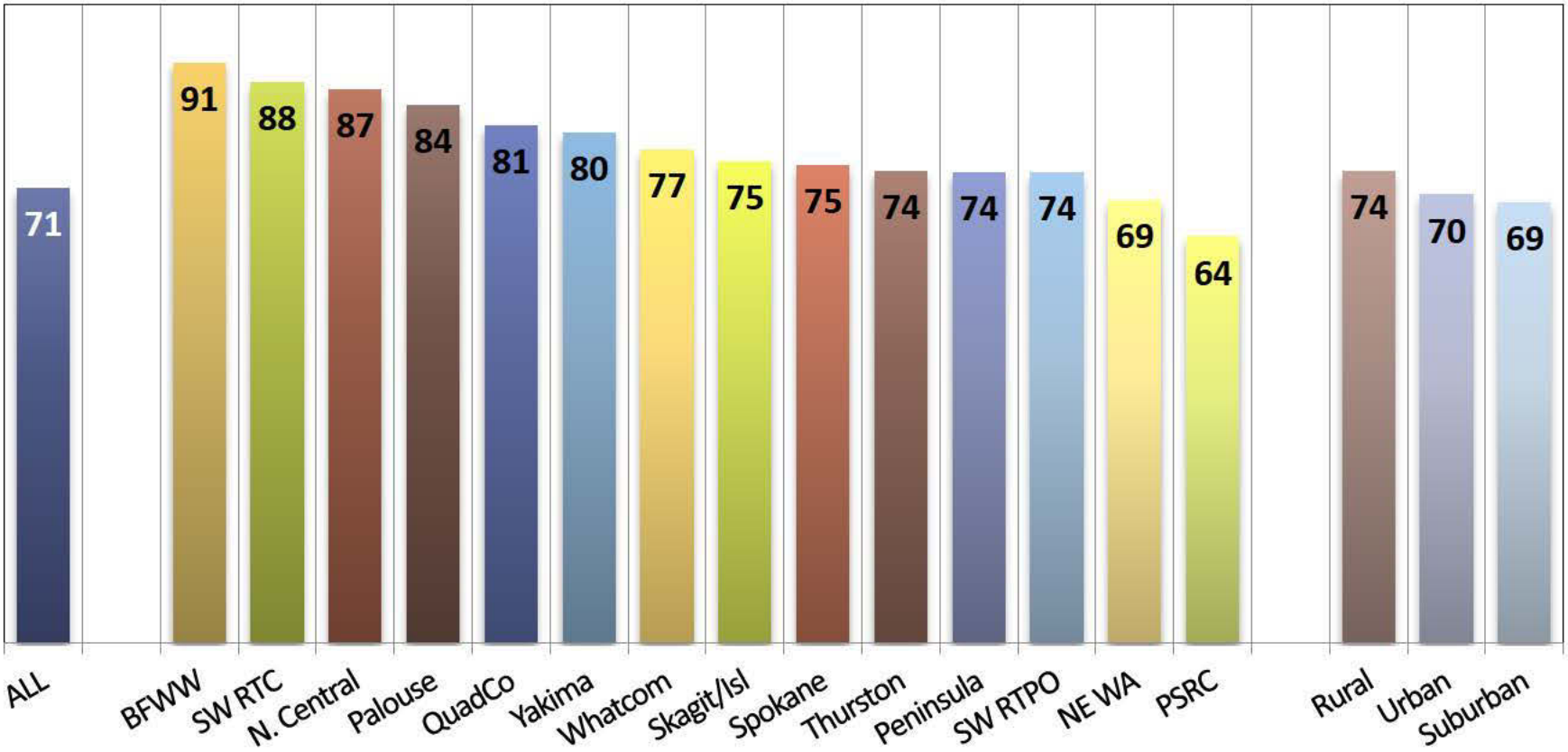


State System by RTPO

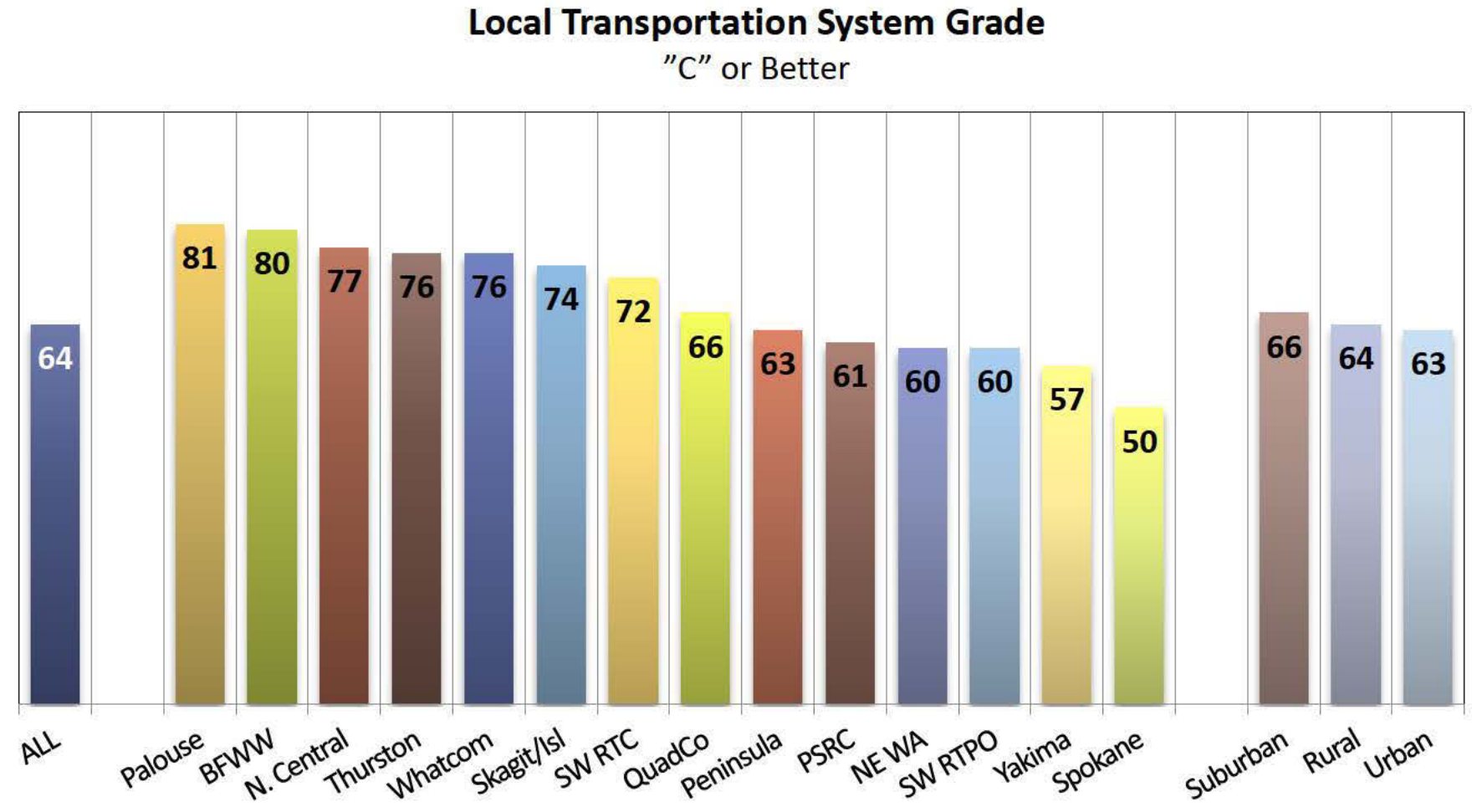
State Transportation System Grade

"C" or Better



Grades higher in rural areas – PSRC lowest.

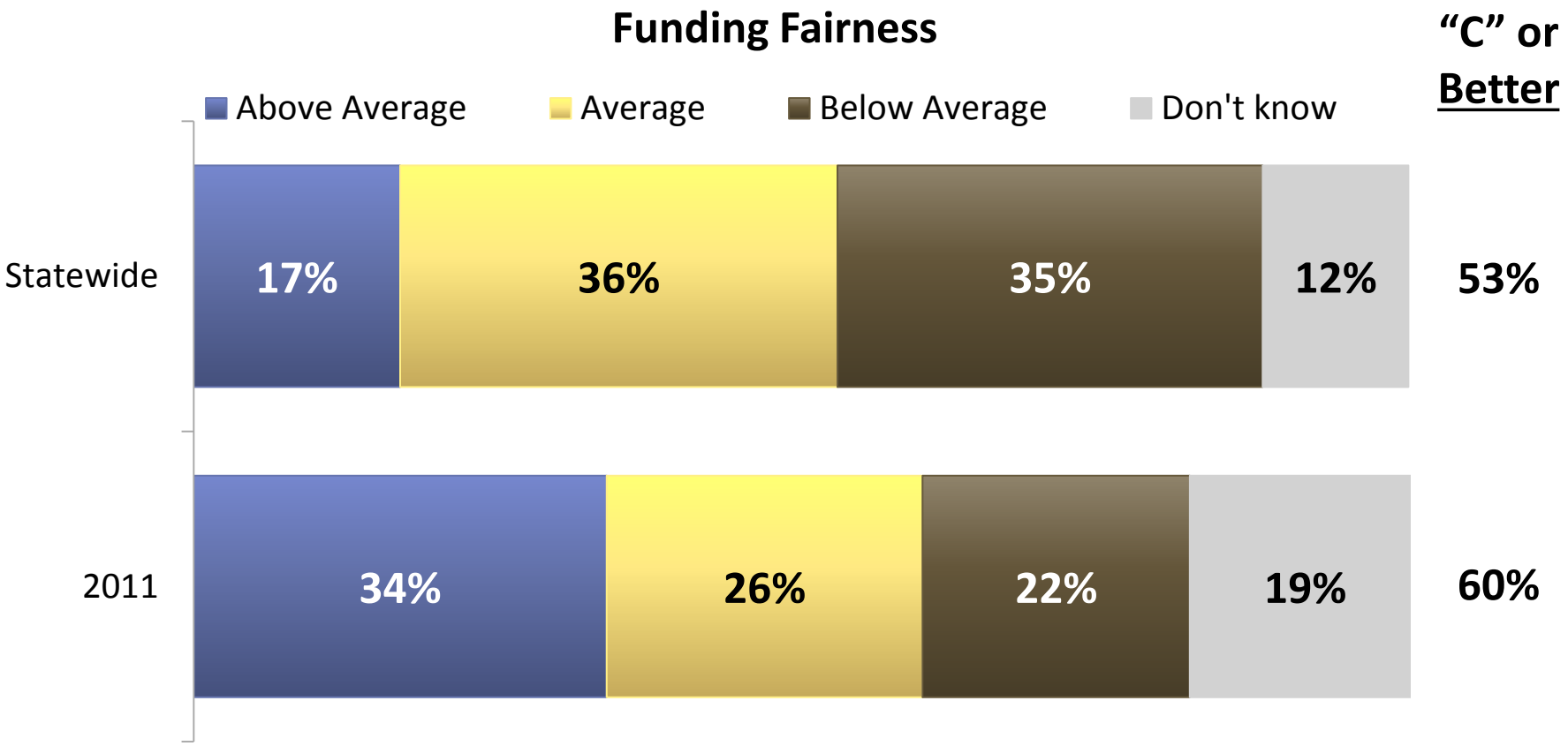
Local System by RTPO



Little difference between Suburban, Rural, Urban – Spokane least satisfied.

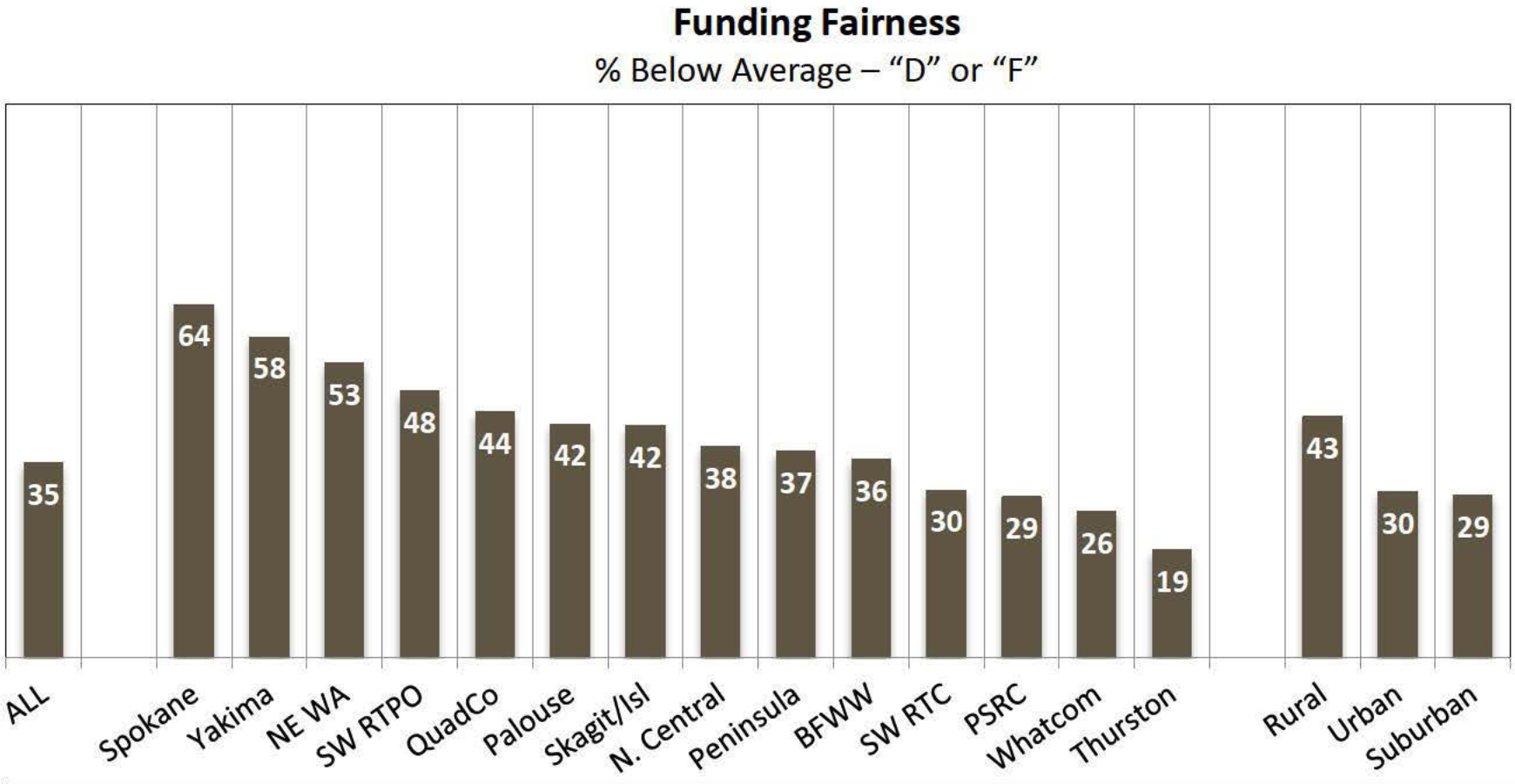
Funding Fairness

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



"Fair Share" by RTPO

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



Rural areas most likely to say the state is below average on funding fairness.

General Revenue Questions

General Support for New Revenue

- *A strong majority of voters agree that the state needs additional transportation revenue. Describing the funding challenges that result from the state being heavily dependent on the gas tax does little to shift attitudes.*

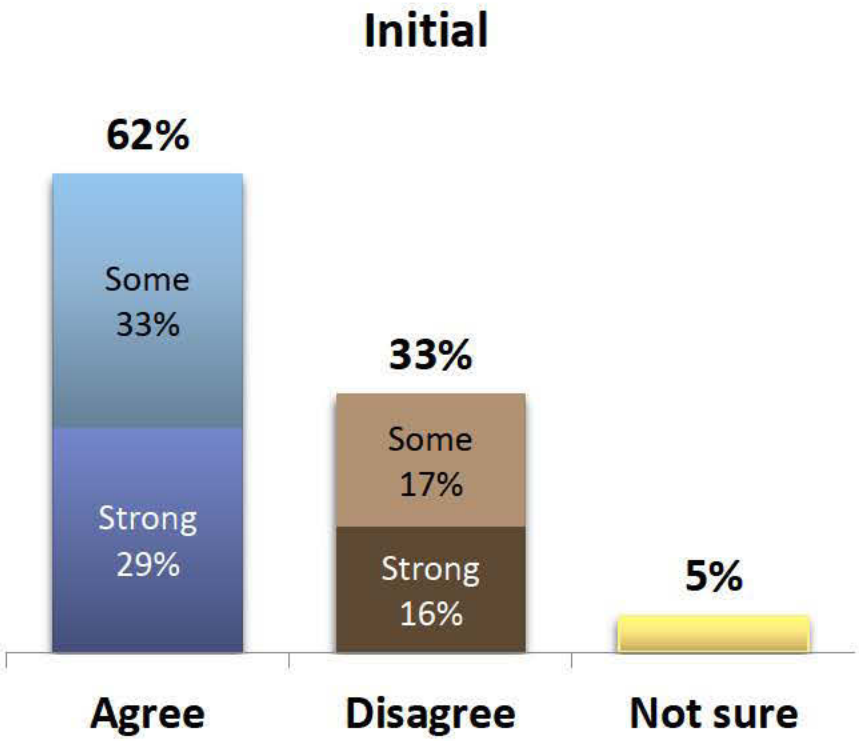
- *Despite acknowledging that the state needs additional transportation revenue, only a bare majority support raising "some transportation taxes and fees" with no dollar amount specified. Support is 8 points lower than in 2011, although the registered voter population is older and more tax sensitive than the adult population.*

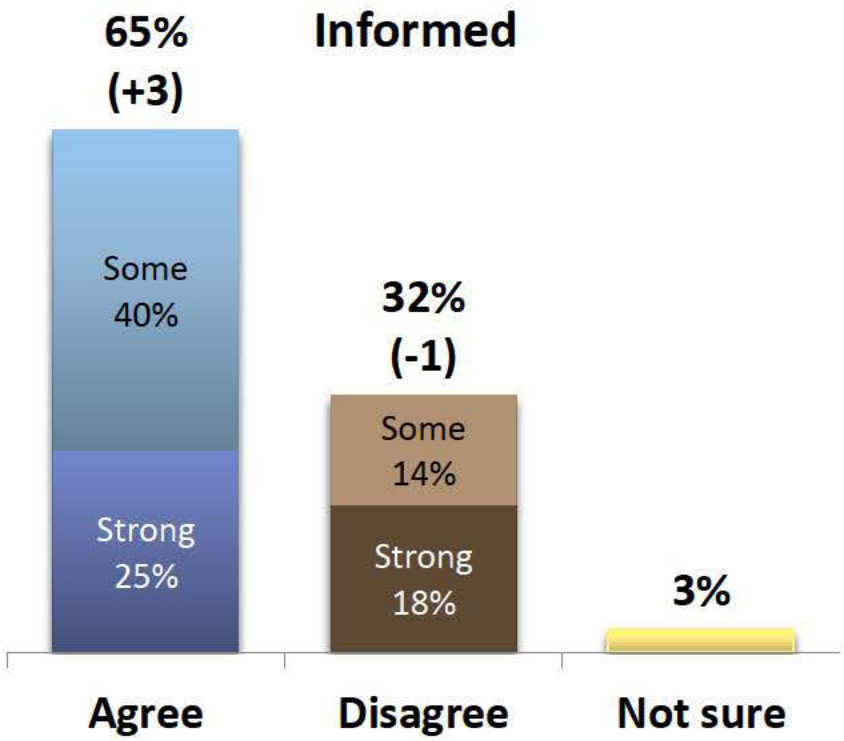
- *When asked about three specific revenue levels -- $30, $15, and $7.50 per month for the average Washington family -- there is only majority support for the lowest amount and only about one in-ten "strongly support" any of these revenue levels.*

Does the state need additional revenue?

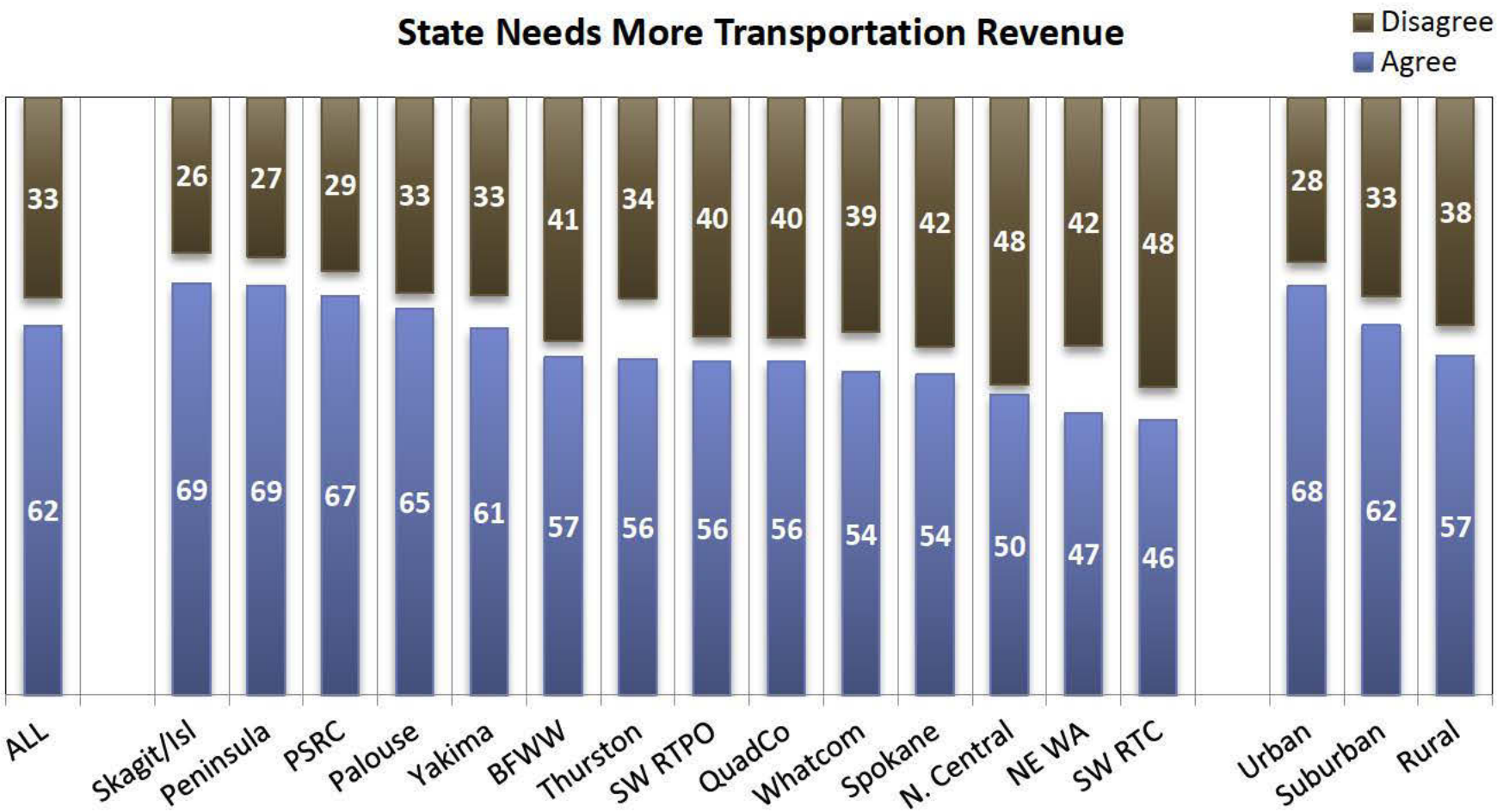
*Do you agree or disagree with the following statement: The State **needs additional revenue** to keep our transportation system safe, effective and properly maintained.*

The state gas tax currently provides 76% of all state transportation funding. A combination of inflation, changing driving habits and increased fuel economy of vehicles, along with the growing numbers of electric vehicles, makes the gas tax an unsustainable transportation revenue source long-term. Meanwhile transportation needs (like maintaining our existing roads/bridges, building new roads/bridges, enhancing transit service, etc.) continue to expand with population growth.



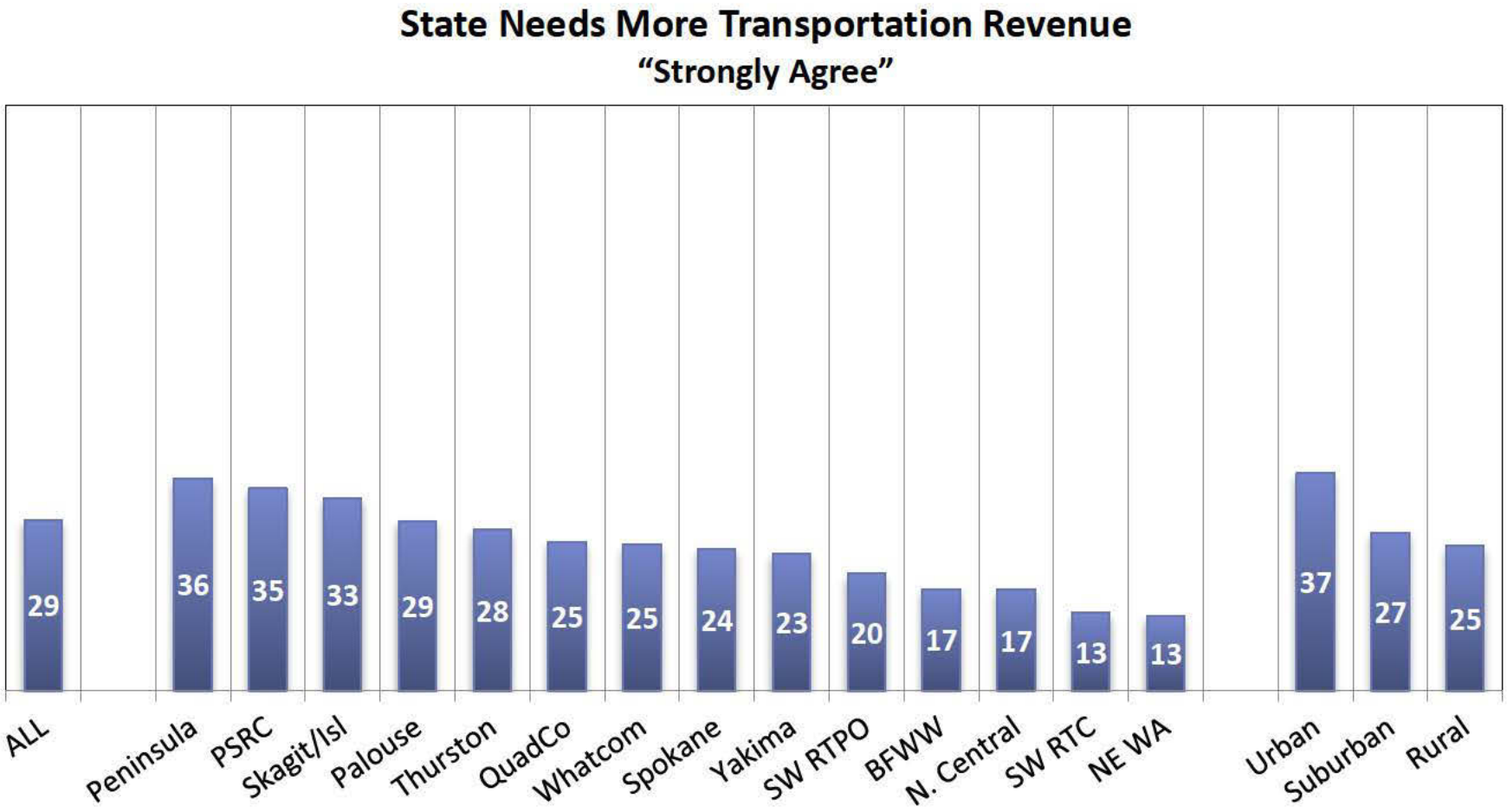


Need More Revenue by RTPO - Initial



Majority agree in 12 of 14 RTPOs. Urban and Suburban more likely to agree.

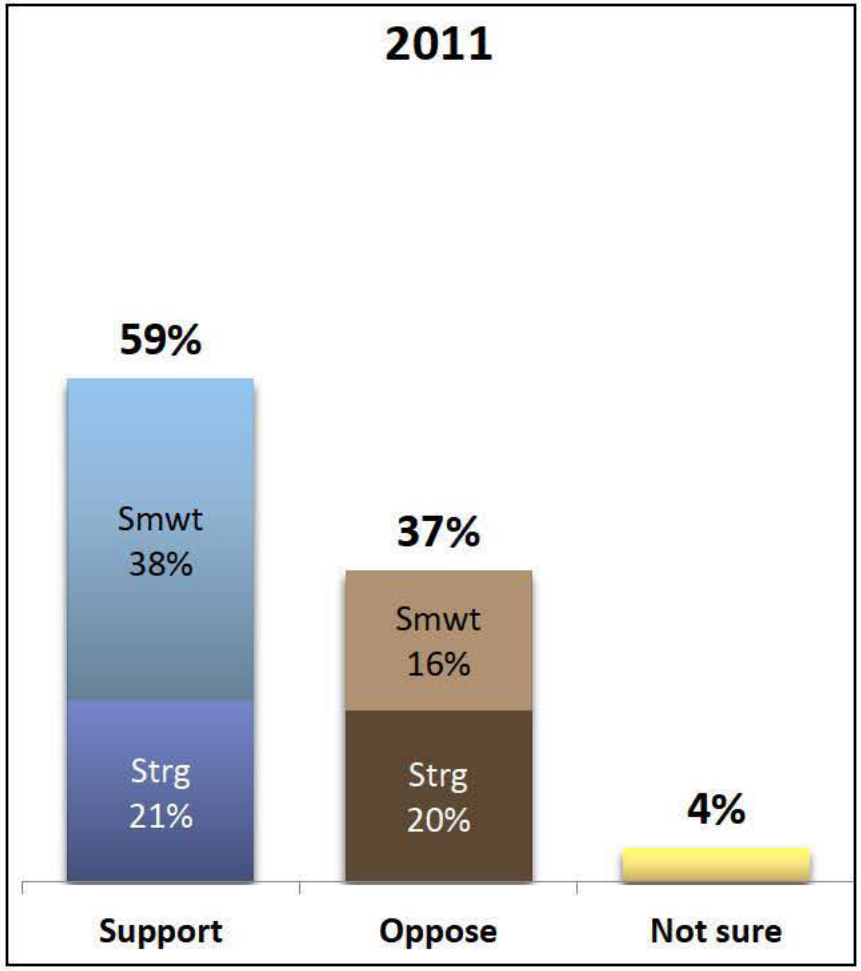
Need More Revenue by RTPO

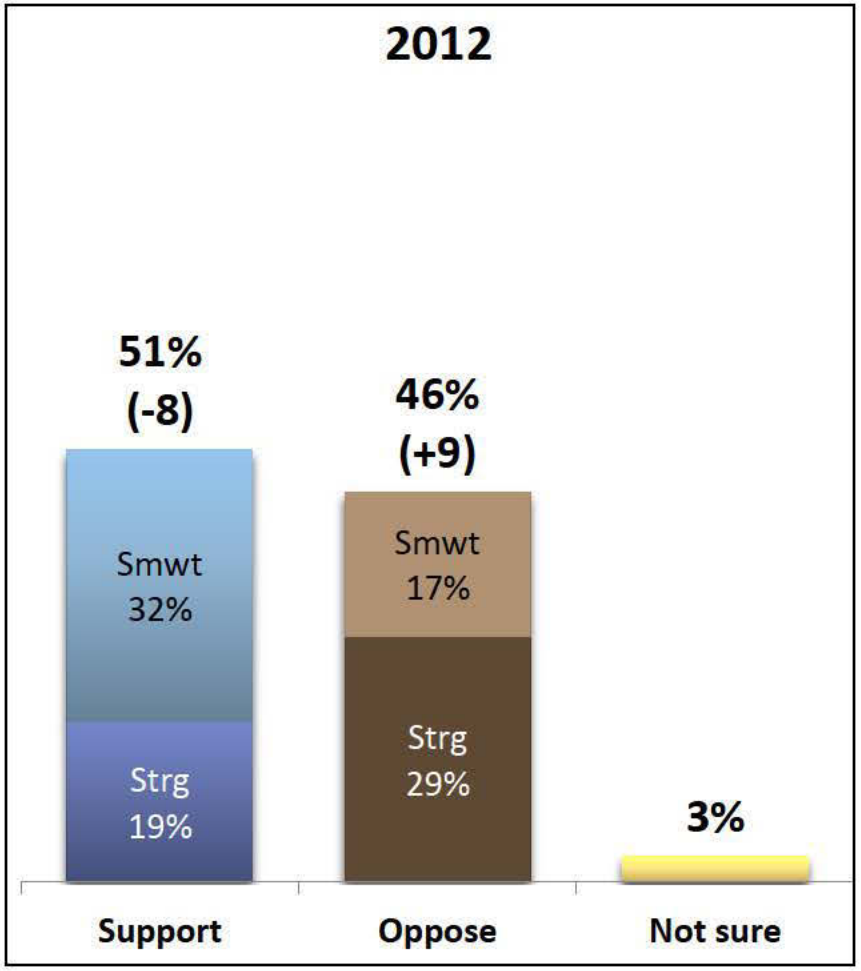


Strong Agree is highest in Urban areas, but does not exceed 37%.

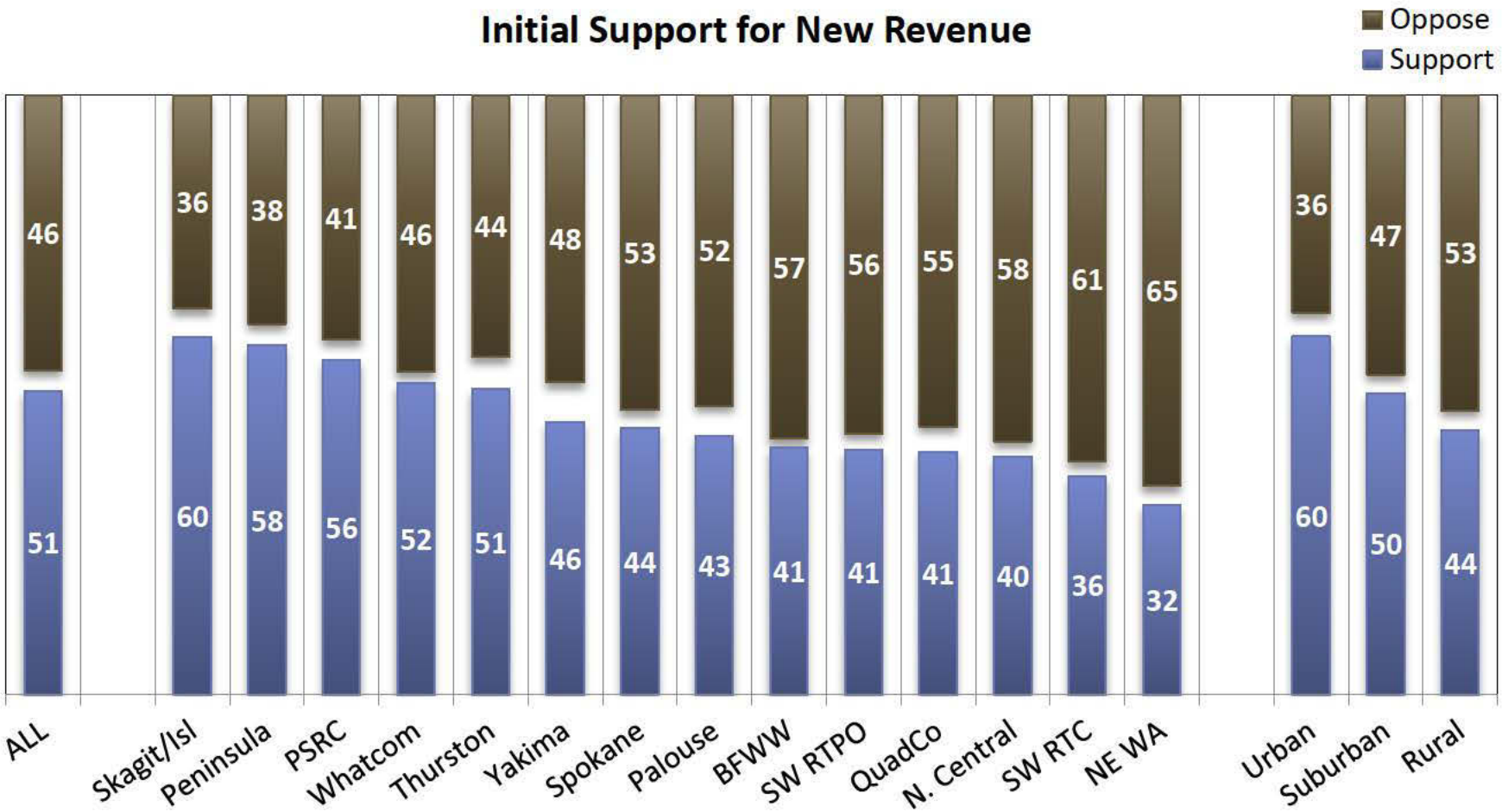
General Support for New Revenue

In general, would you support or oppose raising some transportation taxes and fees to increase funding for transportation?





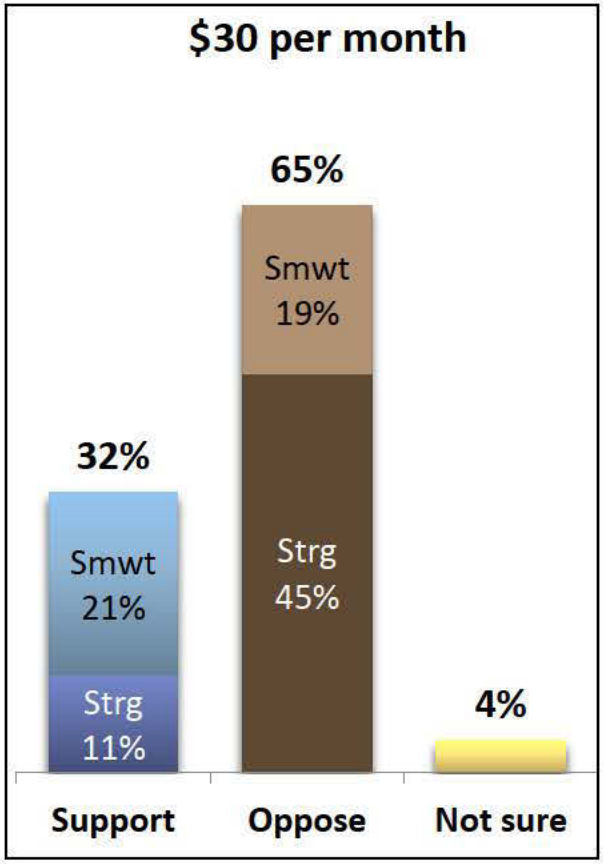
Support for New Revenue by RTPO

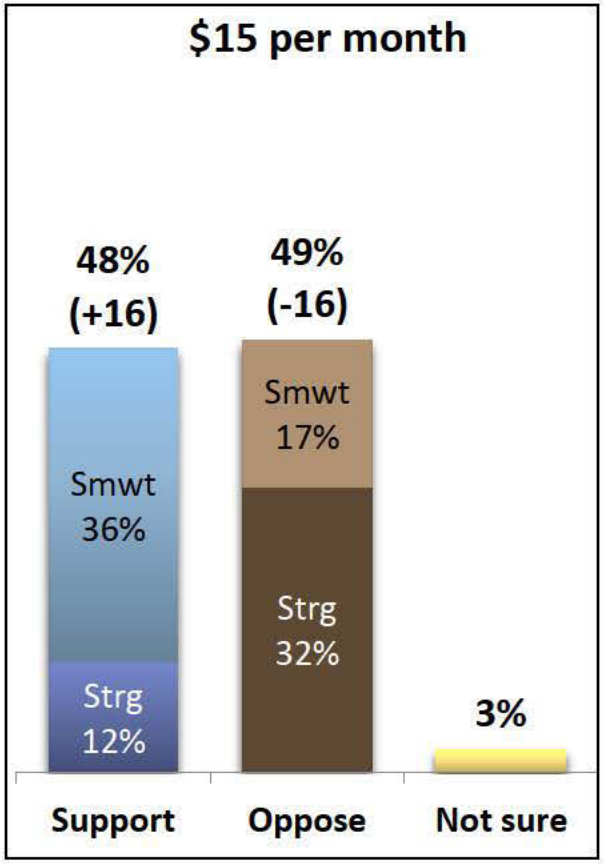


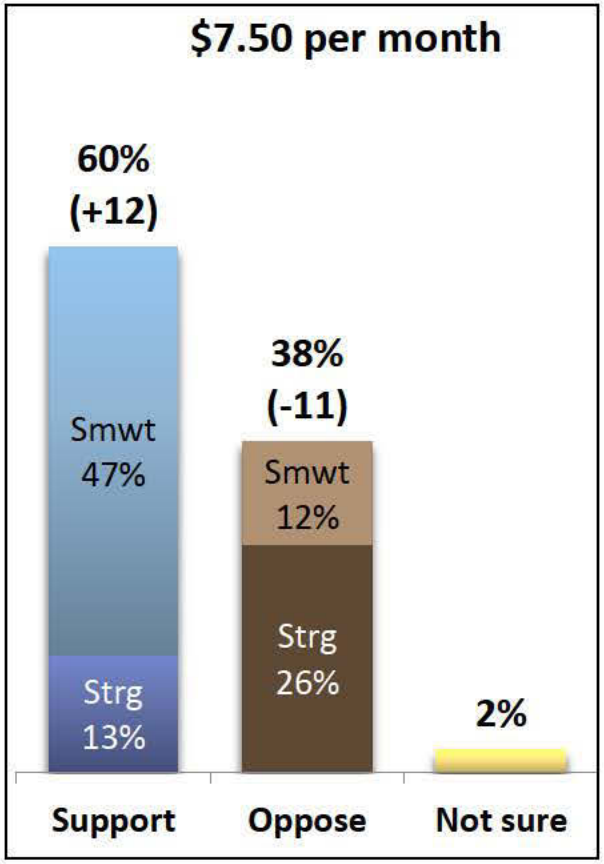
Majority support in only 5 of 14 RTPOs – strongest support in Urban, weakest in Rural.

Support for Various Levels of New Revenue

Would you support or oppose raising some transportation taxes and fees to increase funding for transportation if it would cost the average Washington family like yours an additional….







Budget Exercises

Funding Transportation Needs

- *Of the $2.1 Billion per year in identified funding needs, on average voters said they were willing to fund $763 Million, or 36% of the total need, at a cost of $25 per month for the average Washington family.*

- *Of the 5 funding categories – (1) preservation/maintenance, (2) new lanes/expanded capacity, (3) transit/rail, (4) bike/sidewalk, and (5) ferries -- preservation/maintenance (45%) and transit/rail (38%) needs were funded at the highest percentage and new lanes/expanded capacity was the lowest at 24%.*

Intro – Funding Transportation Needs

The Connecting Washington Task Force, a group of business leaders and local government, labor, and environmental leaders issued a report outlining a 10 year transportation strategy. The Task Force estimated that it will require an additional $5 billion per year over the next 10 years to fund our transportation system.

Because of the difficult economy, the Task Force proposed a lower $2.1 billion per year in transportation investments to maintain our existing transportation system and provide some funds to meet the economic and travel needs of a growing population.

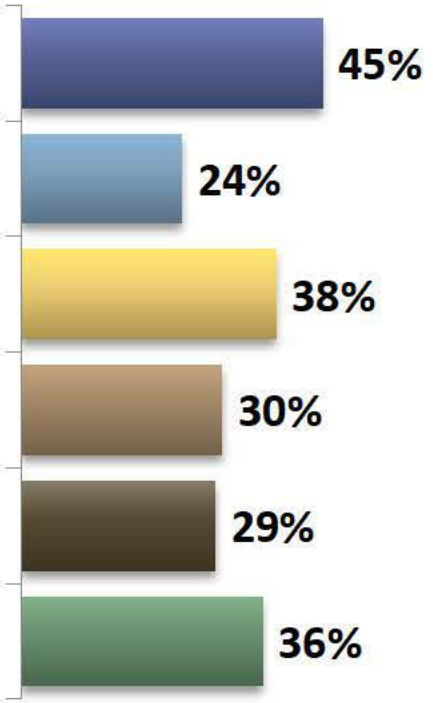
% Funded by Category

For each transportation category in the table below, please indicate what percentage, if any, of the need you would fund.

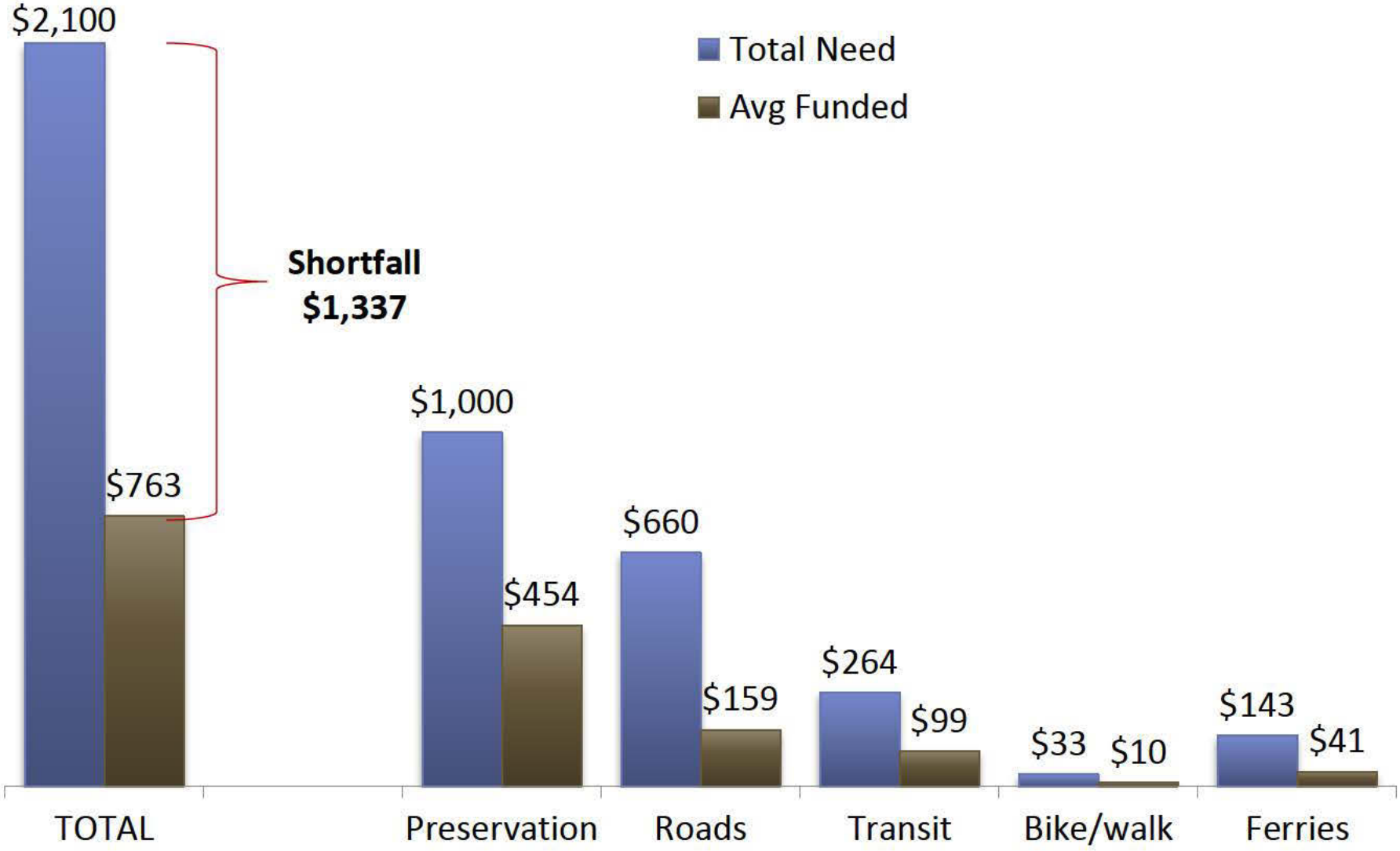
Note: This table shows the $2.1 billion per year in transportation needs by category along with a rough estimate of what it would cost the average household PER MONTH to completely fund that need.

You can give each category any percentage from 0% to 100% depending on how much you feel it should be funded. After you have responded for all 5 categories, the next page will show the total amount you chose to fund and the rough cost per month.

	Total Needed PER YEAR	Cost to Fund 100%
Preservation and maintenance of the existing transportation system	$1.0 Billion	$33 per month
Adding new lanes and expanding road and bridge capacity	$660 Million	$22 per month
Increasing transit service and expanding passenger and freight rail	$264 Million	$ 9 per month
Making bike and sidewalk improvements	$ 33 Million	$ 1 per month
Replacing obsolete ferries and improving ferry terminals	$143 Million	$ 5 per month

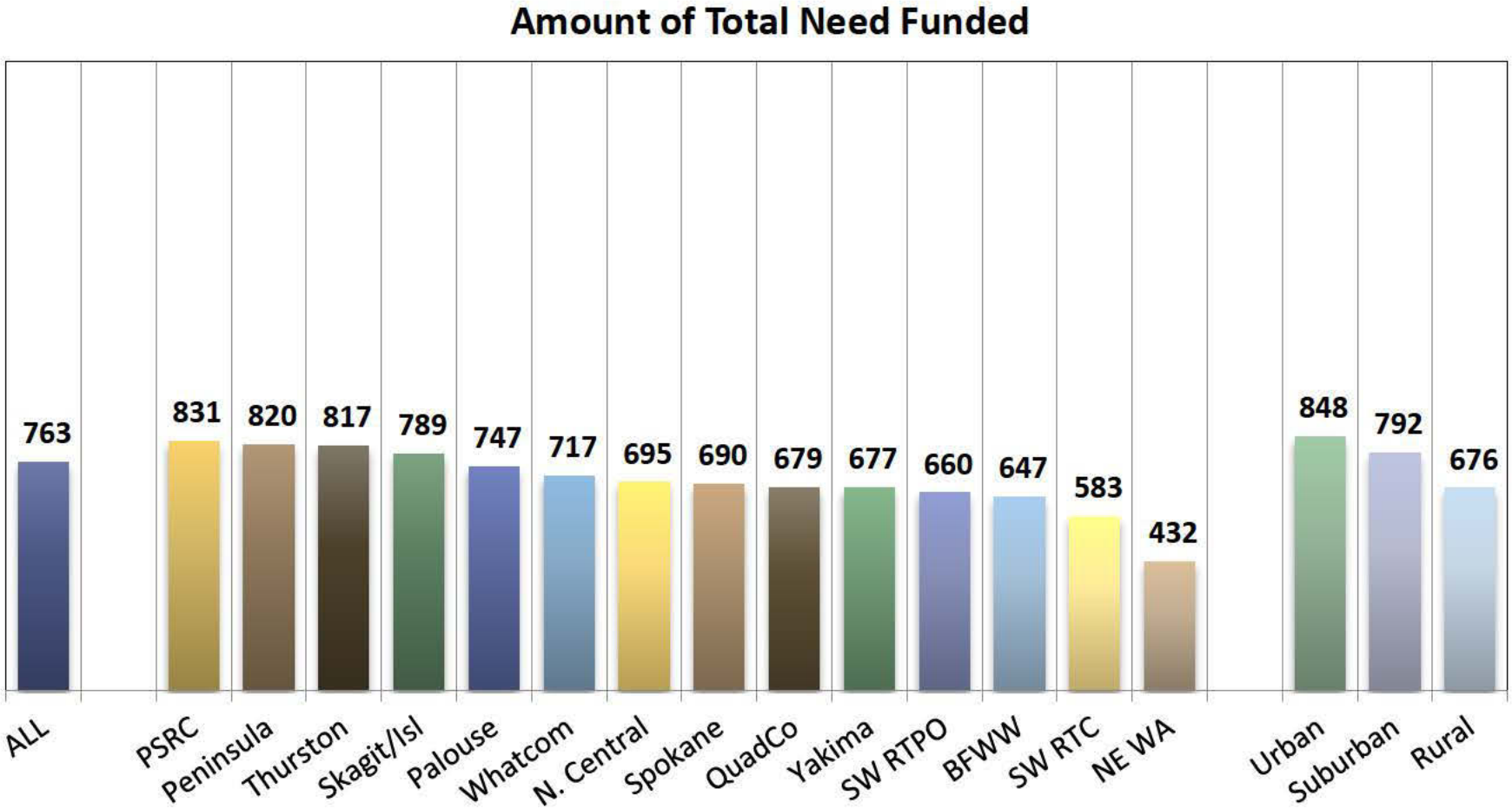


$ Funded by Category



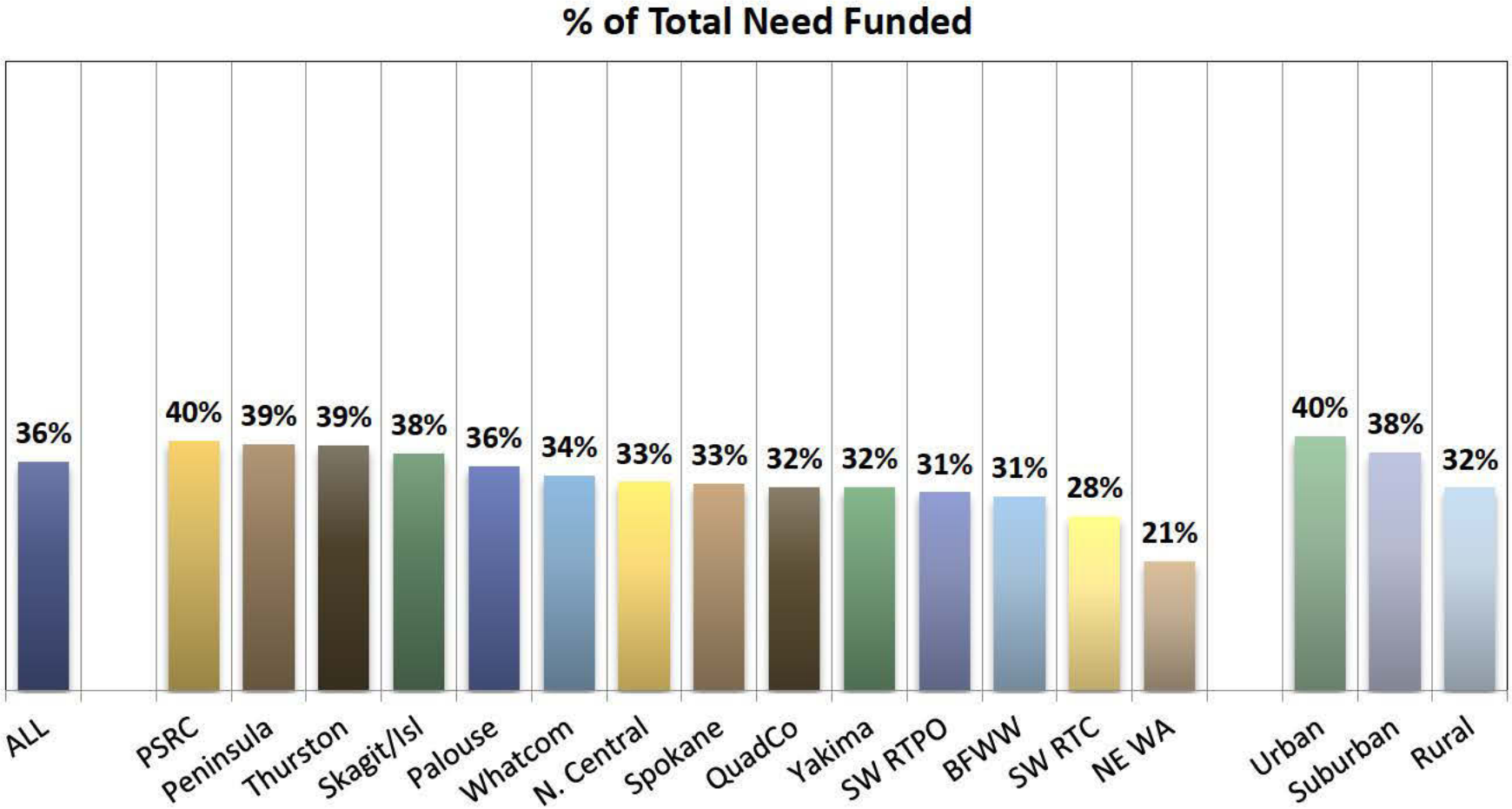
Avg. Monthly Cost by Category

$ Funded by RTPO



Puget Sound counties are highest – Rural areas lowest.

% Funded by RTPO



Puget Sound counties are highest – Rural areas lowest.

Intro – Revenue Sources

The table on the next page gives estimates of how much different taxes/fees would raise for transportation and how much the new taxes/fees would cost the average household based on the following state averages:

Vehicles Owned:	***2.5 Vehicles***
Vehicle Value:	***$6,200 per vehicle***
Miles Driven:	***10,000 miles per vehicle per year***
Miles per Gallon:	***20 MPG average***

The cost to your household could be lower or higher depending on how many vehicles you own, how much you drive, what kind of gas mileage you get and how much your vehicles are worth.

Revenue

- *On average voters supported $554 Million in revenue increases, or 73% of the $763 Million spending average. In other words, the average shortfall between voters' desired spending levels and voter supported revenue was $209 Million.*
- *This $554 in revenue increase was estimated to cost the average Washington family roughly $18 per month.*
- *The $554 Million in supported revenue represents 26% of the $2.1 Billion in total needs.*
- *The average increase supported for each of the 3 revenue sources was:*
  - *Gas Tax: 4.8 cents*
  - *MVET: 0.68%*
  - *VLF: $20.11*

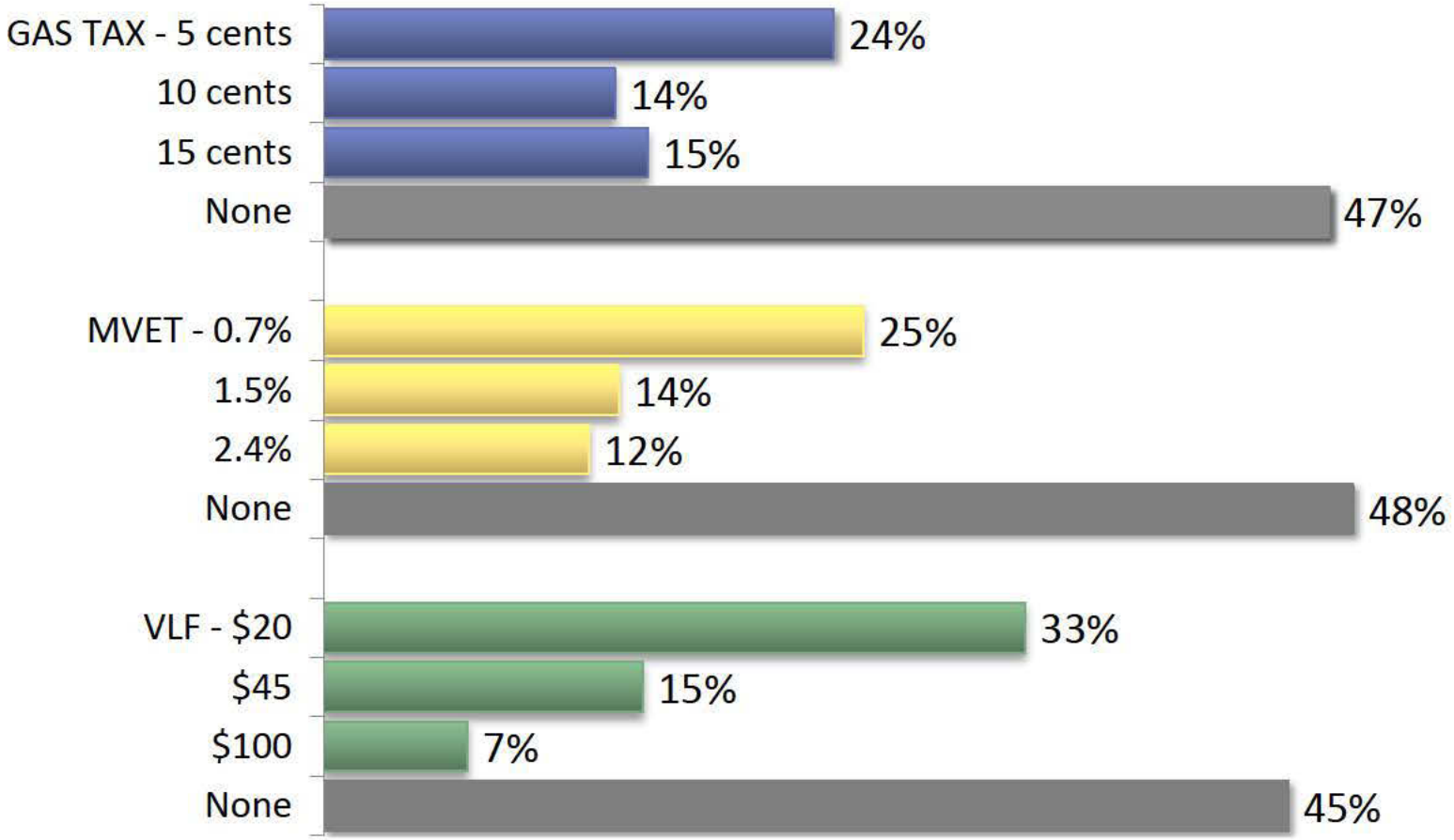
Revenue Sources

For each of the 3 transportation taxes/fees in the table below – the Gas Tax, Motor Vehicle Excise Tax, and Vehicle License Fee, please indicate which tax/fee increases, if any, you support to fund those needs. NOTE: All new revenue would only be used for transportation purposes.

	Amount Raised PER YEAR	Total Cost PER MONTH
Gas Tax - currently 37.5 cents a gallon		
○ a 5 cents per gallon Gas Tax increase	$155 million	$ 5.21
○ a 10 cents per gallon Gas Tax increase	$310 million	$10.42
○ a 15 cents per gallon Gas Tax increase	$465 million	$15.63
○ no Gas Tax increase		
Motor Vehicle Excise Tax - currently no state MVET		
○ a new annual 0.7% MVET	$250 million	$ 9.04
○ a new annual 1.5% MVET	$536 million	$19.38
○ a new annual 2.4% MVET	$858 million	$31.05
○ no state MVET		
Vehicle License Fee - currently $30 per year		
○ a $20 VLF increase	$158 million	$ 4.17
○ a $45 VLF increase	$355 million	$ 9.38
○ a $100 VLF increase	$790 million	$20.87
○ no VLF increase		

Support for Specific Revenue Increases

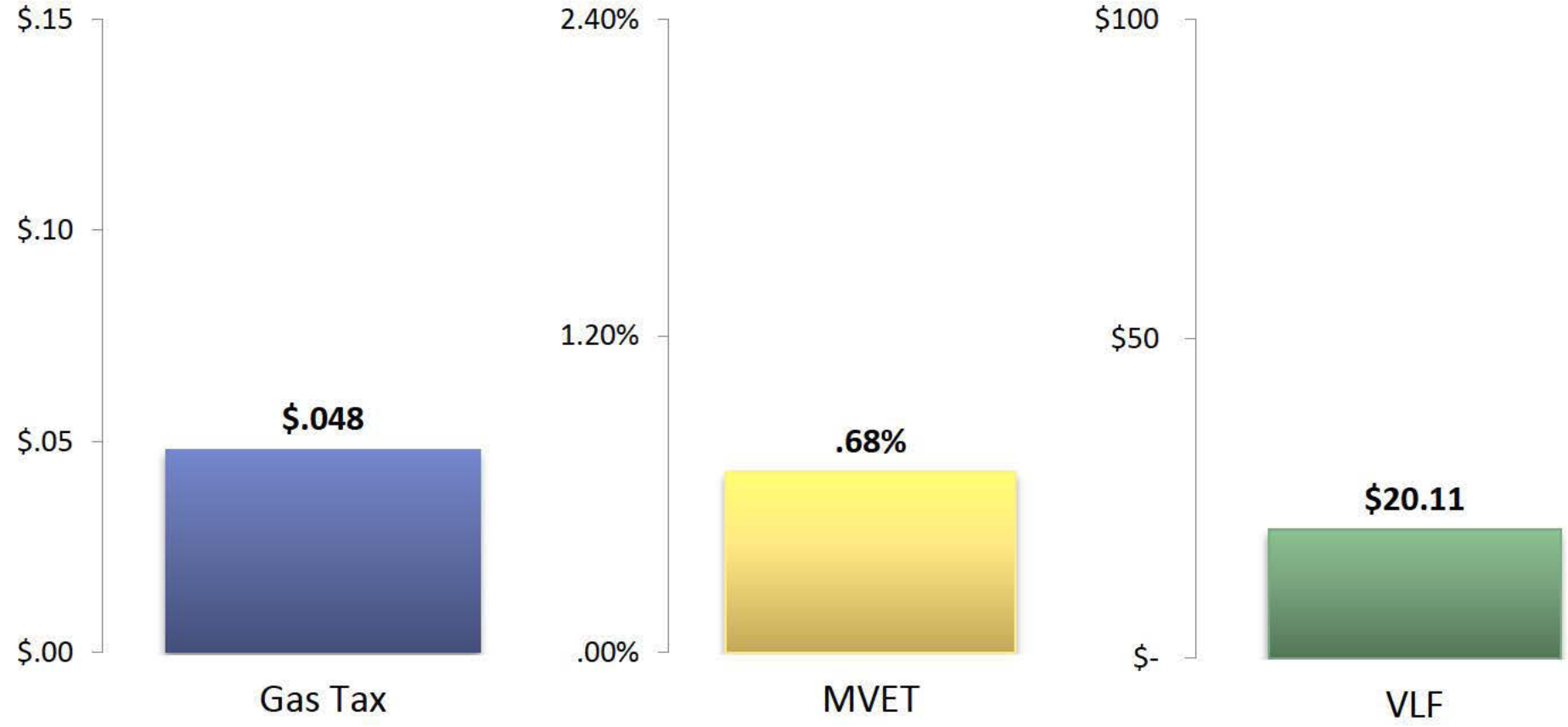
For each of the 3 transportation taxes/fees in the table below – the Gas Tax, Motor Vehicle Excise Tax, and Vehicle License Fee, please indicate which tax/fee increases, if any, you support to fund those needs. NOTE: All new revenue would only be used for transportation purposes.



Average Increase Supported

For each of the 3 transportation taxes/fees in the table below – the Gas Tax, Motor Vehicle Excise Tax, and Vehicle License Fee, please indicate which tax/fee increases, if any, you support to fund those needs. NOTE: All new revenue would only be used for transportation purposes.

Average Increase Supported by Revenue Source



Average Revenue and Average Increase

Average Revenue Per Year

$554M

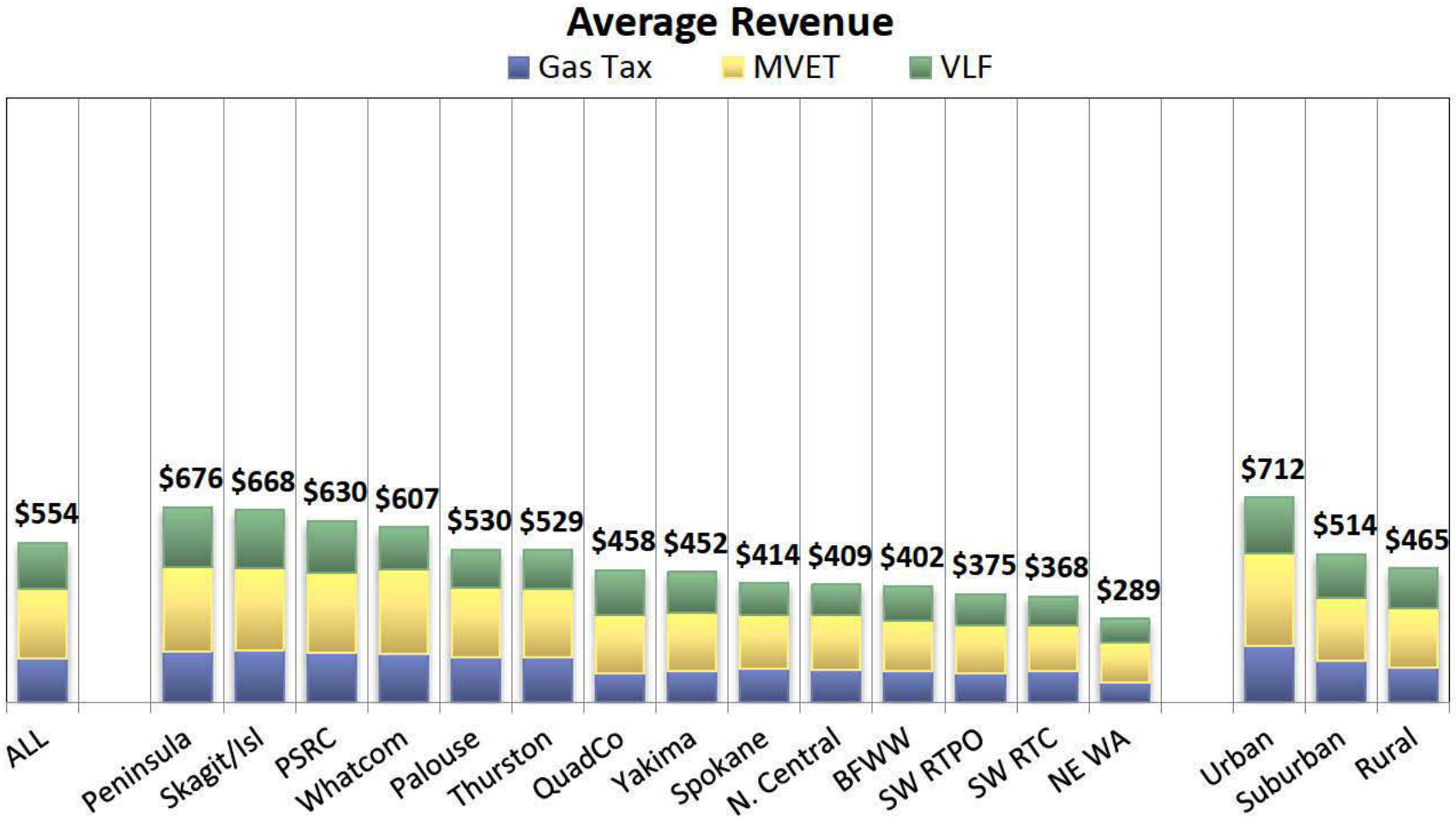
Revenue per Year

Average Increase Per Month

$18.09

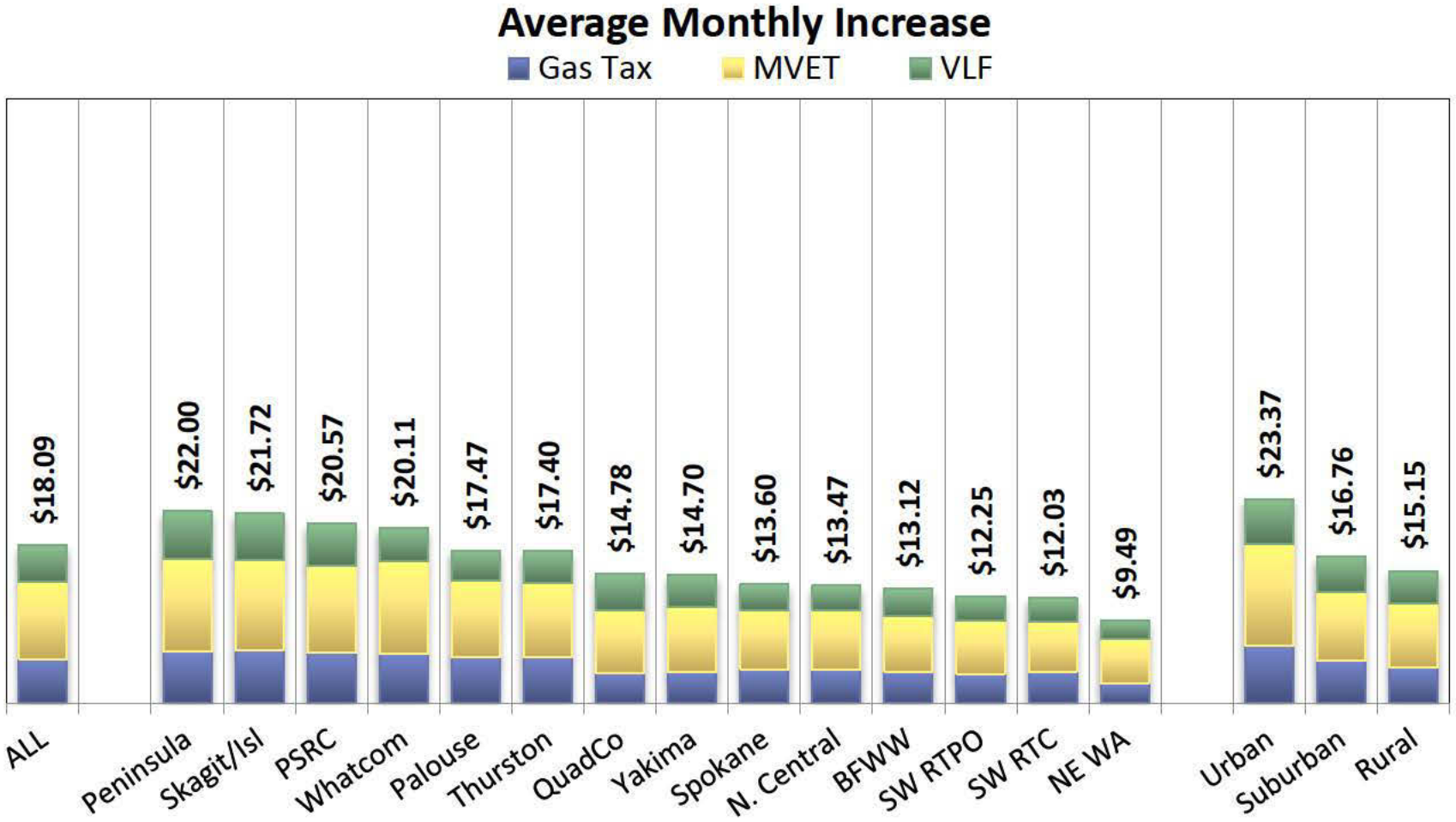
Avg Increase per Month

Average Revenue Raised by RTPO



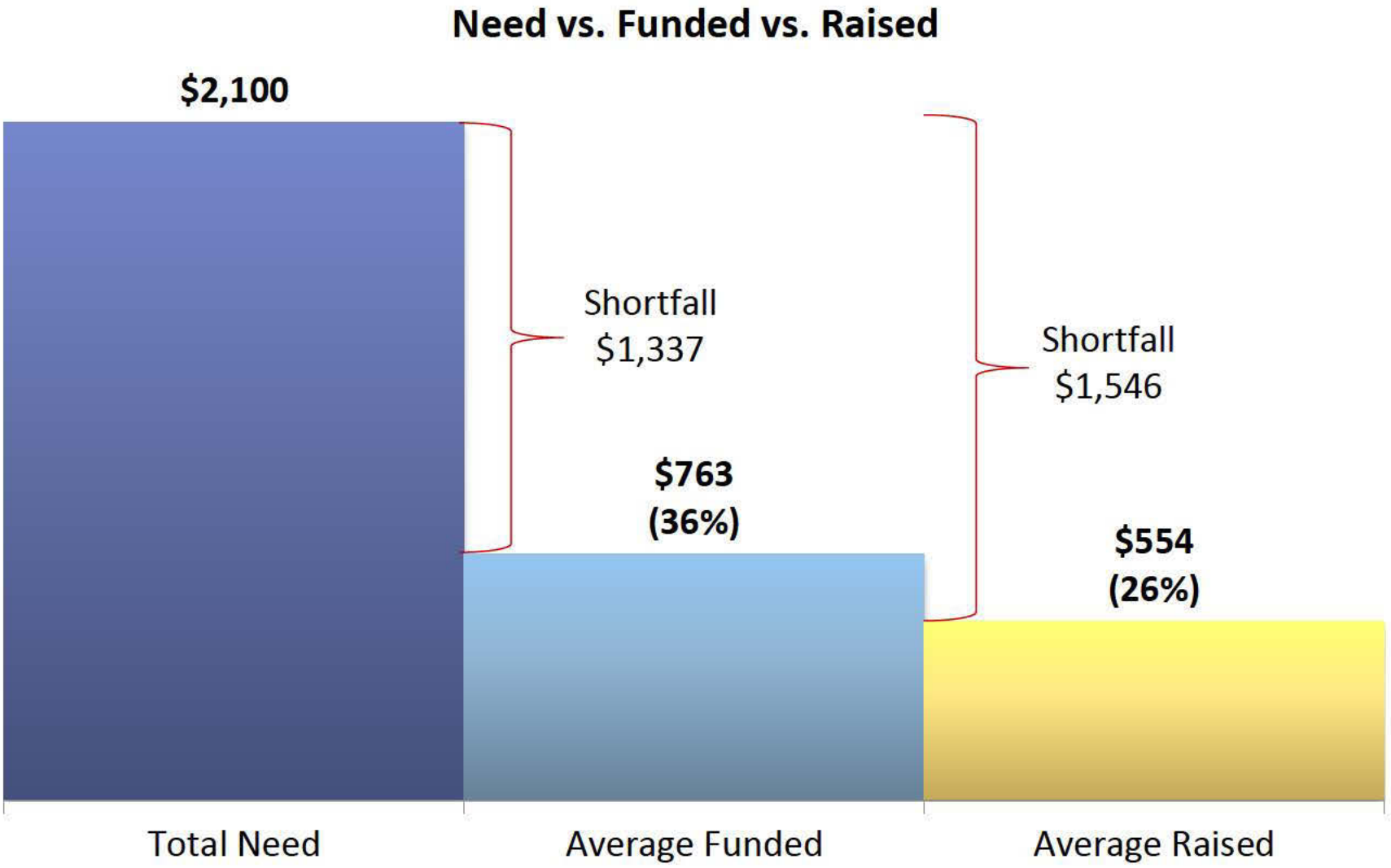
Urban areas willing to fund significantly higher revenue levels.

Average Monthly Increase supported by RTPO



Urban areas highest at just over $23/month.

Need vs. Funded vs. Raised



Other Funding Questions

Findings

- *About a quarter of voters believe they pay higher than average transportation taxes/fees, a third say about the same, and a third say lower than average.*

- *Half of voters say they were aware of the transportation funding shortfall before the survey, one-in-five don't believe there is a shortfall, and a third say they were not aware of the shortfall.*

- *Of the 6 long term funding sources tested in the survey, only a vehicle emissions fee and tolling receive majority support as "a good way to help provide future funding for our transportation system."*

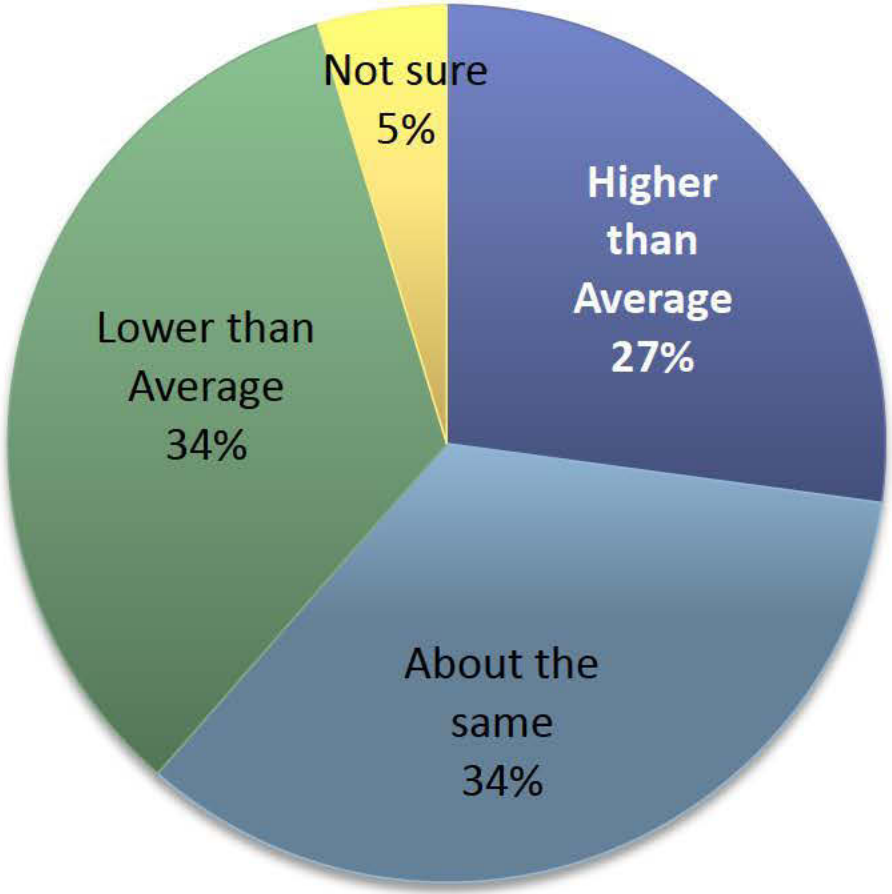
Your Transportation Fees/Taxes

Below are the household averages across the state:

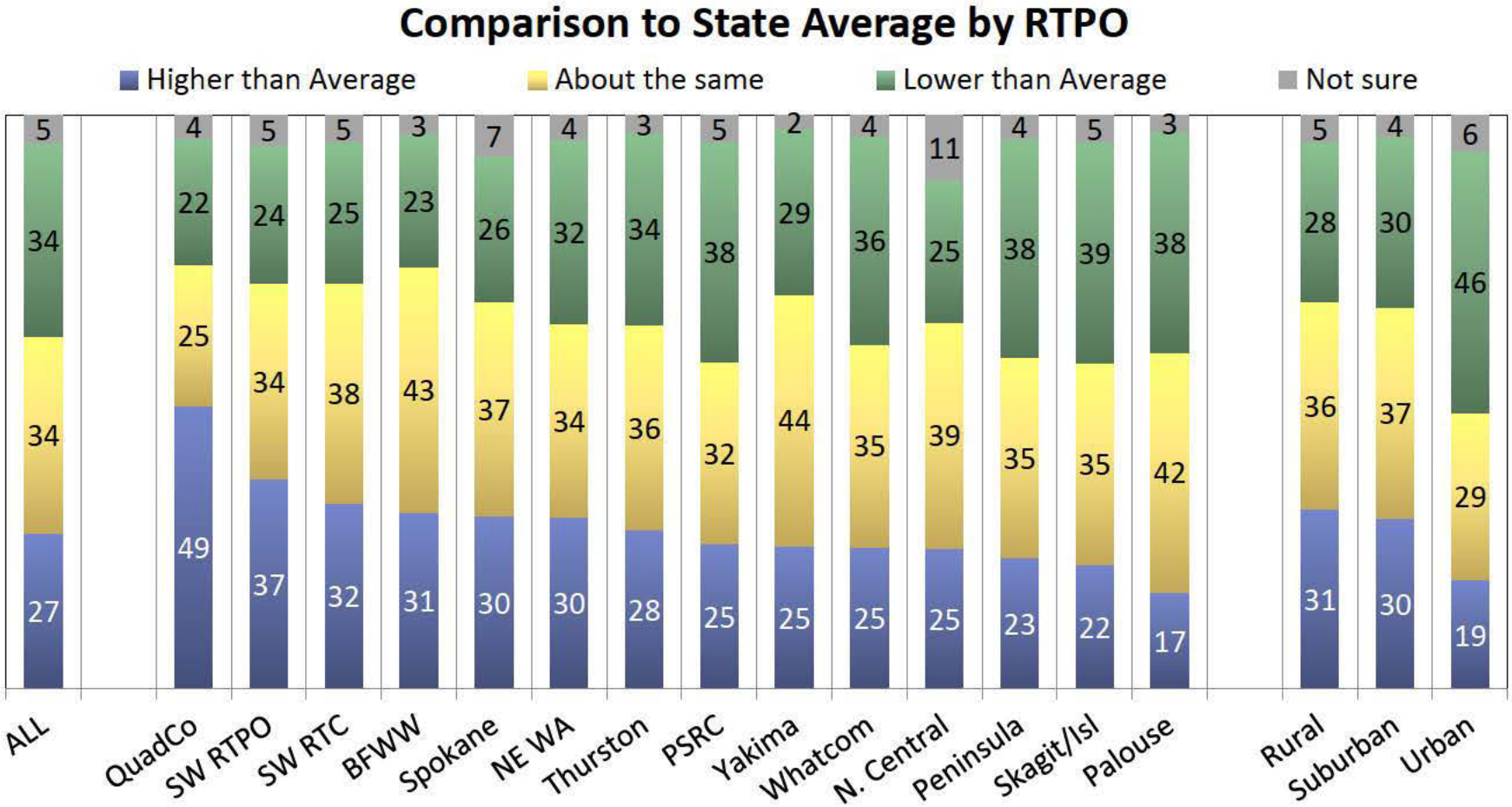
Vehicles Owned: 2.5 Vehicles
Vehicle Value: $6,200 per vehicle
Miles Driven: 10,000 miles vehicle/year
Miles per Gallon: 20 MPG average

Based on the above averages, compared to the type of vehicles you own and how much you drive, in general do you think the total transportation taxes you pay are higher, lower, or about the same as the average Washington household?

Your Fee/Taxes Compared to the State Average



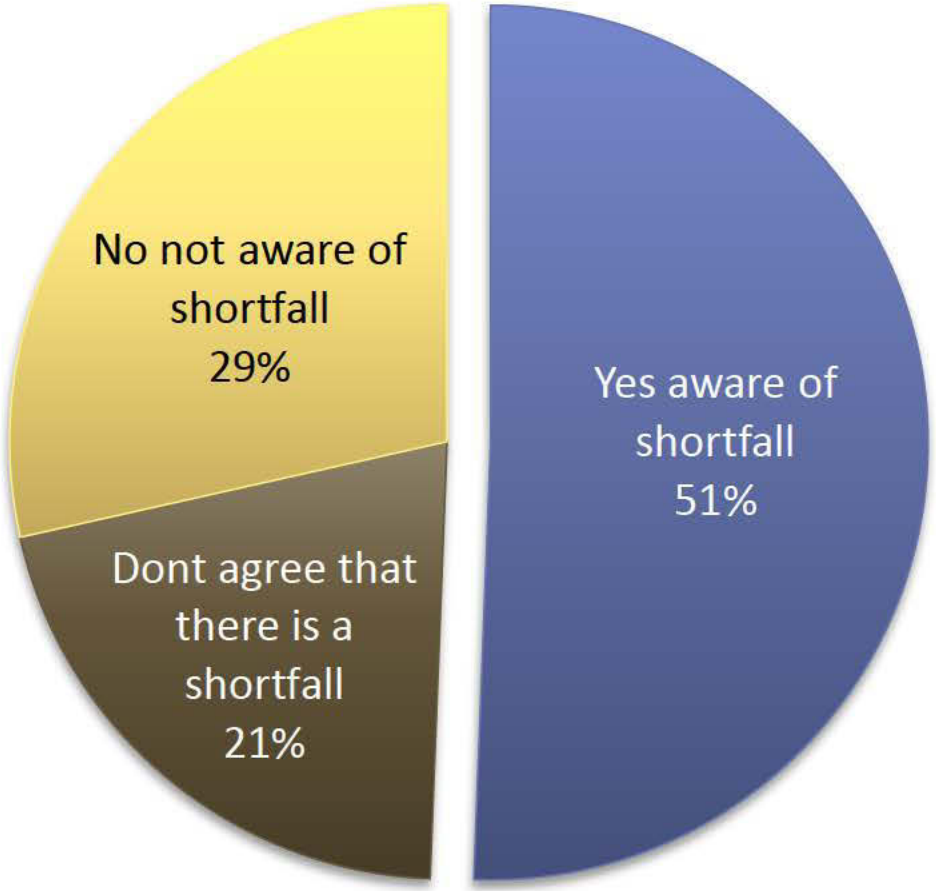
Your Transportation Fees/Taxes by RTPO



Rural and Suburban voters much more likely to say higher than average.

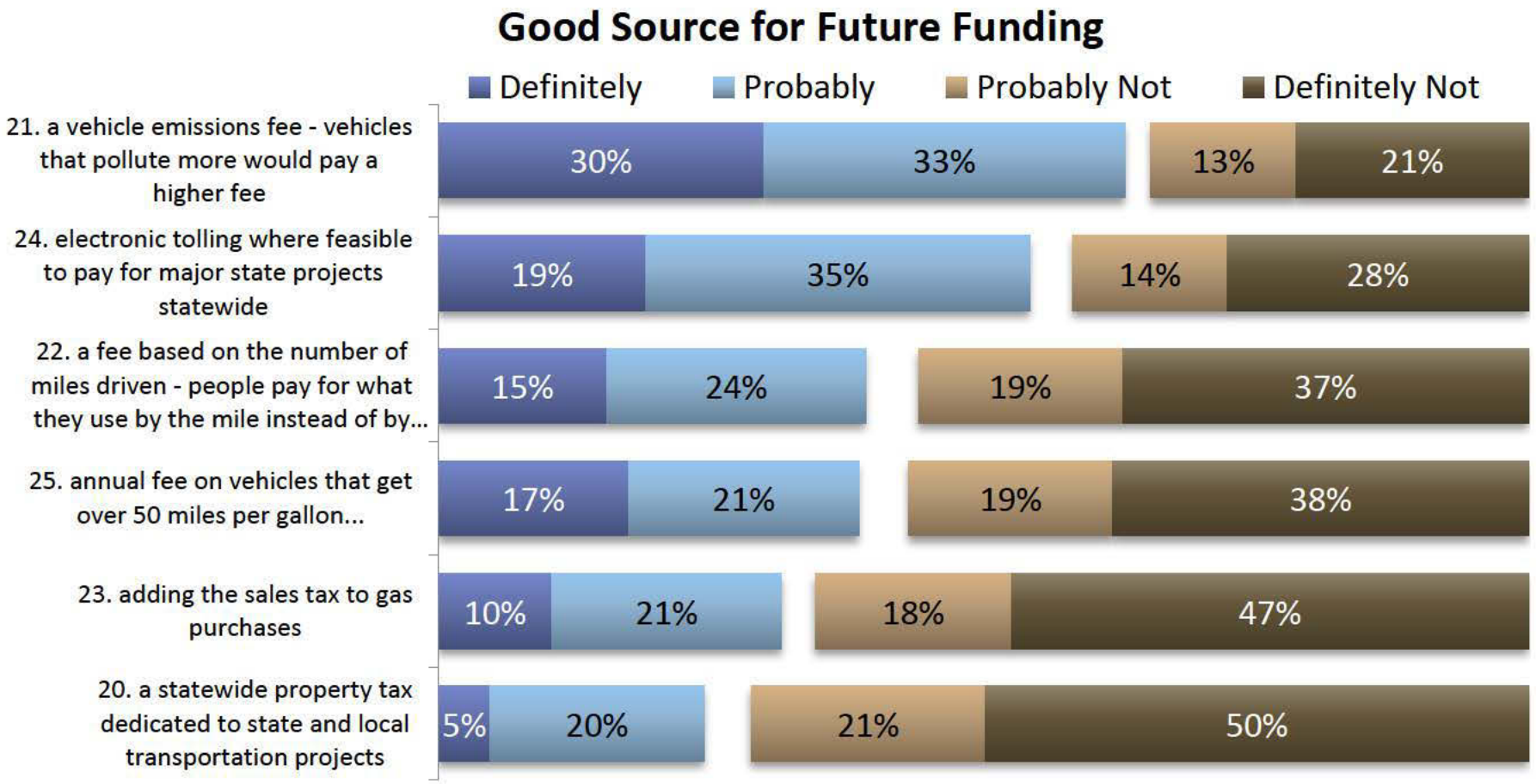
Awareness of Funding Shortfall

Before this survey, were you aware or not of the funding challenges created by relying on the gas tax to provide three-fourths of our transportation revenue?



Future Funding Sources

There are a number of long term funding options being considered to address the state's long-term transportation financial challenges. For each revenue source, please indicate whether or not you think that method is a good way to help provide future funding for our transportation system.



High Mileage Vehicle Fee

I'd like to ask you about an annual fee on vehicles that get over 50 miles per gallon. This fee would help recover some of the gas tax revenues that these drivers of high MPG cars do not currently pay so that all drivers contribute their share to transportation funding.

In general, do you support or oppose a $200/$125/$50 per year flat fee on vehicles that get over 50 miles per gallon?

Tolling

Tolling

- *Tolling for new projects and tolling as a way to maintain and improve existing roads both have solid support across the state, except in Southwest RTC.*
- *Voters are divided about tolling to manage traffic congestion.*
- *Just over a third of voters (36%) think toll money should only be used for the specific project where the toll is collected. Combined, a majority support using toll revenue for the entire travel corridor (38%) AND for all toll projects statewide (18%).*

Support for Tolling

The next set of questions are about electronic tolling, that is, charging drivers a fee on some major highways and bridges in such a way that drivers do not have to stop at toll booths.

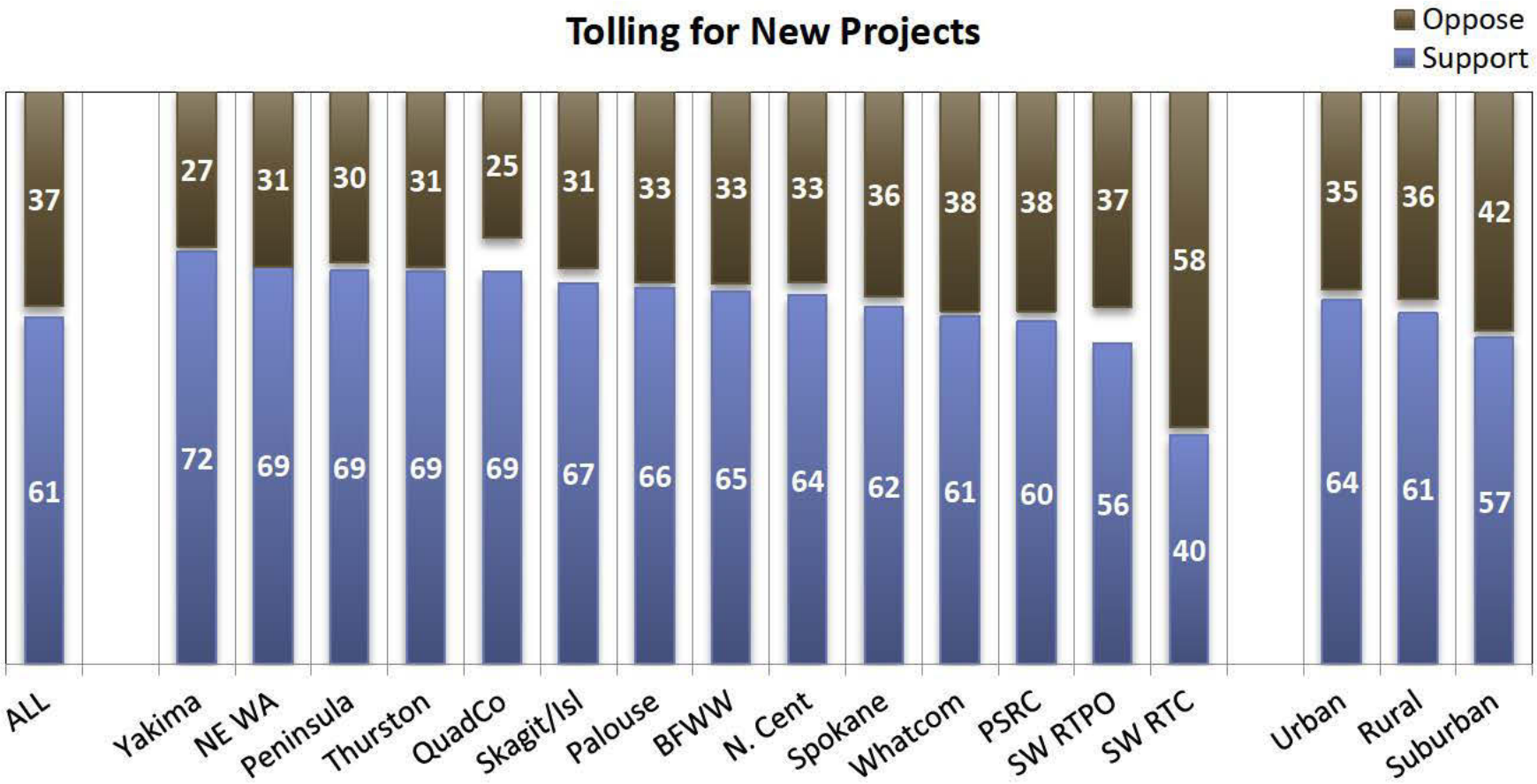
In general, do you support or oppose tolling as a way to help pay for new state transportation projects?

In general, do you support or oppose using tolls as a way to help pay to maintain and improve some existing state highways and bridges?

In general, do you support or oppose using tolls as a way to help manage traffic congestion?

Tolling for New Projects by RTPO

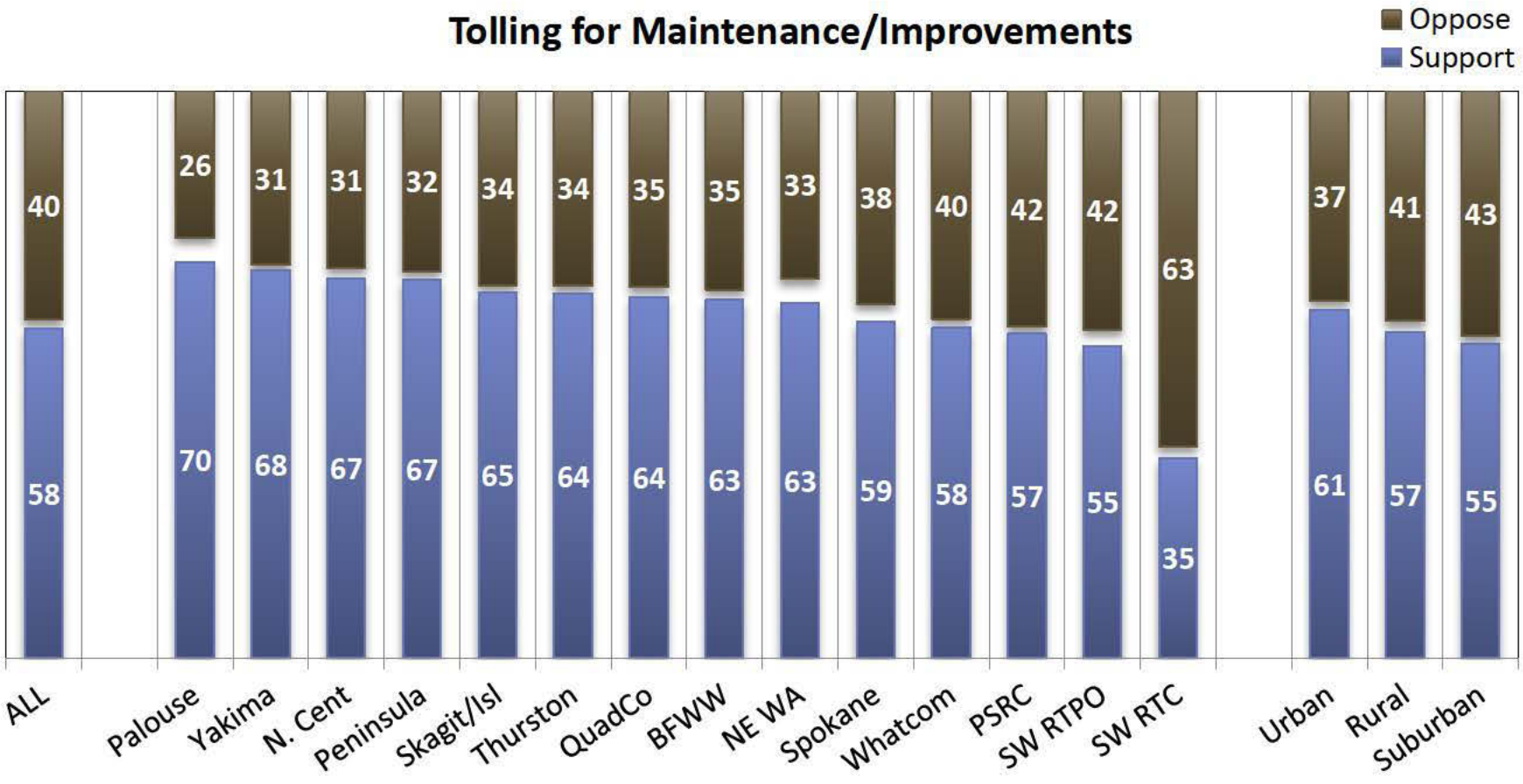
*In general, do you support or oppose tolling as a way to help pay for **new state transportation projects**?*



Strong majority support in 13 of 14 RTPOs – SW RTC majority opposed.

Tolling for Maintenance/Improvement by RTPO

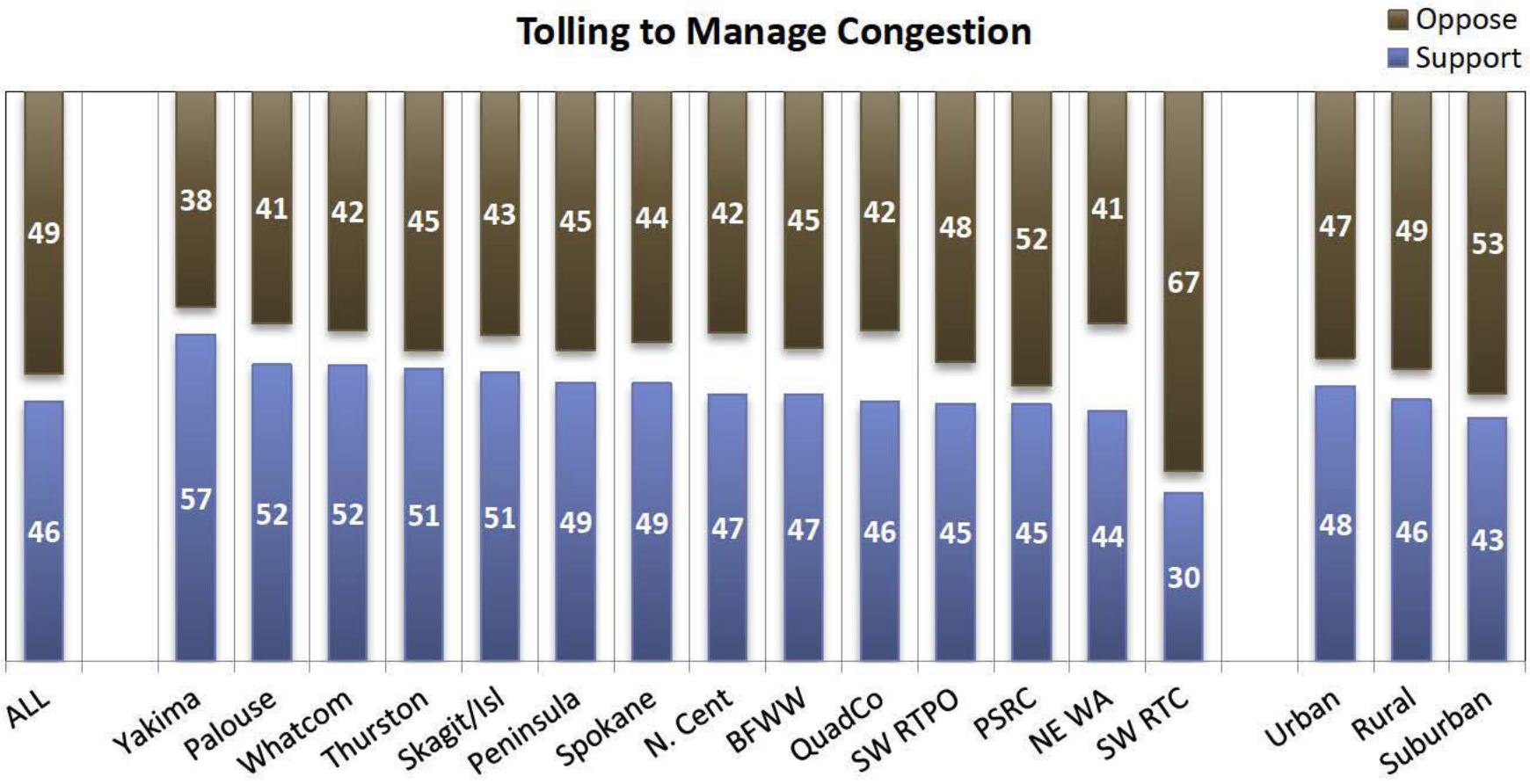
*In general, do you support or oppose using tolls as a way to help pay to **maintain and improve some existing state highways and bridges**?*



Strong majority support in 13 of 14 RTPOs - slightly lower than for new projects.

Tolling to Manage Congestion by RTPO

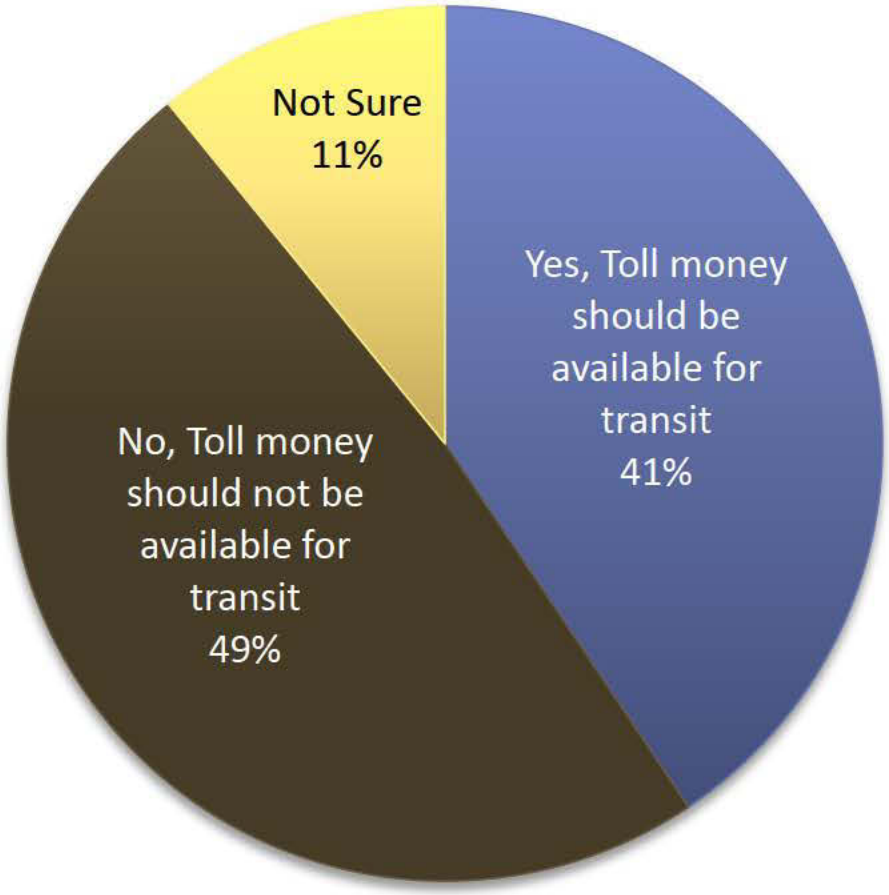
*In general, do you support or oppose using tolls as a way to help **manage traffic congestion**?*



Most RTPOs divided – majority support in 5 RTPOs.

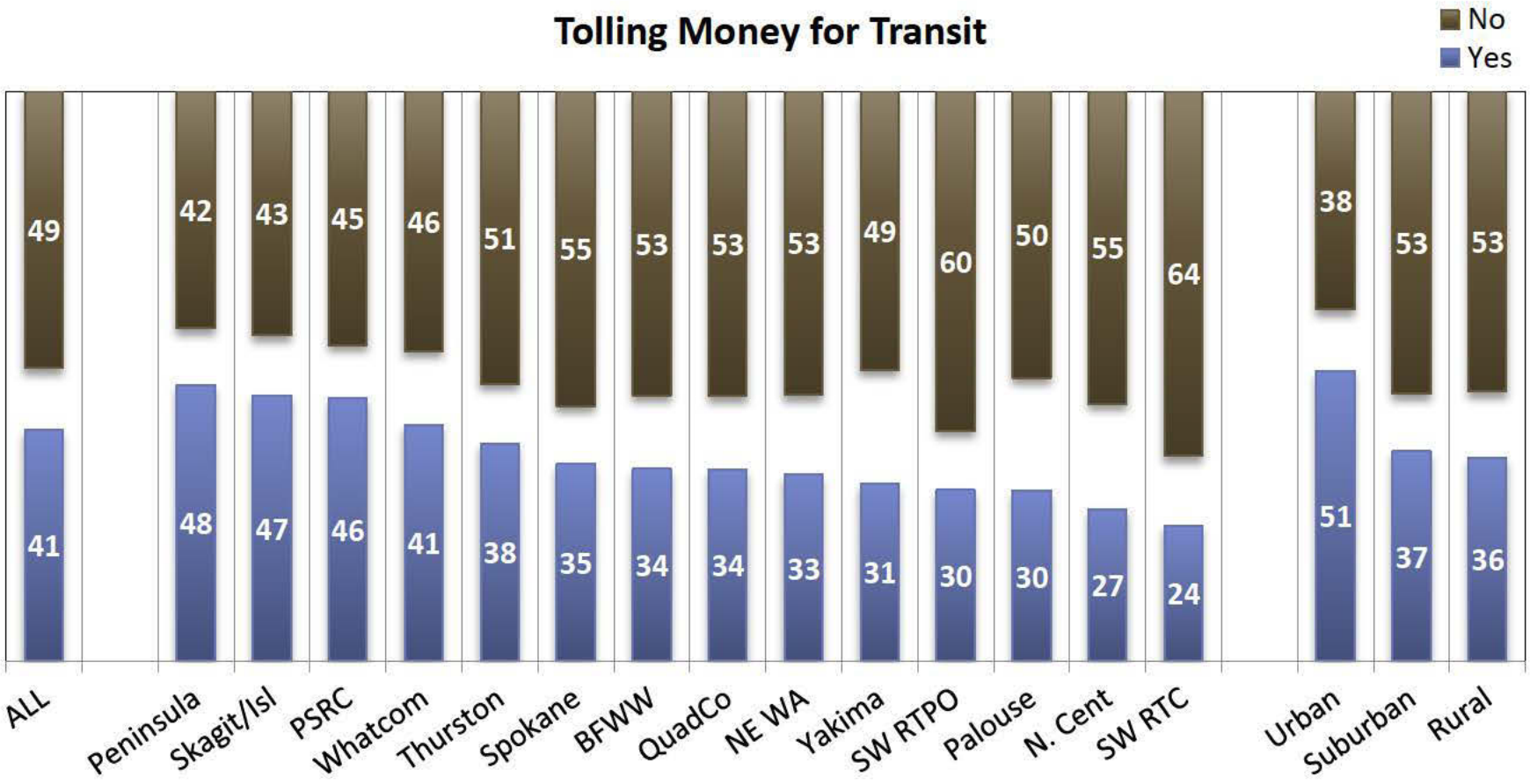
Tolling and Transit

Regardless which toll option you chose, do you think toll money should be available to help fund transit?



Tolling and Transit by RTPO

Regardless which toll option you chose, do you think toll money should be available to help fund transit?



Strongest support in Urban/Puget Sound region.

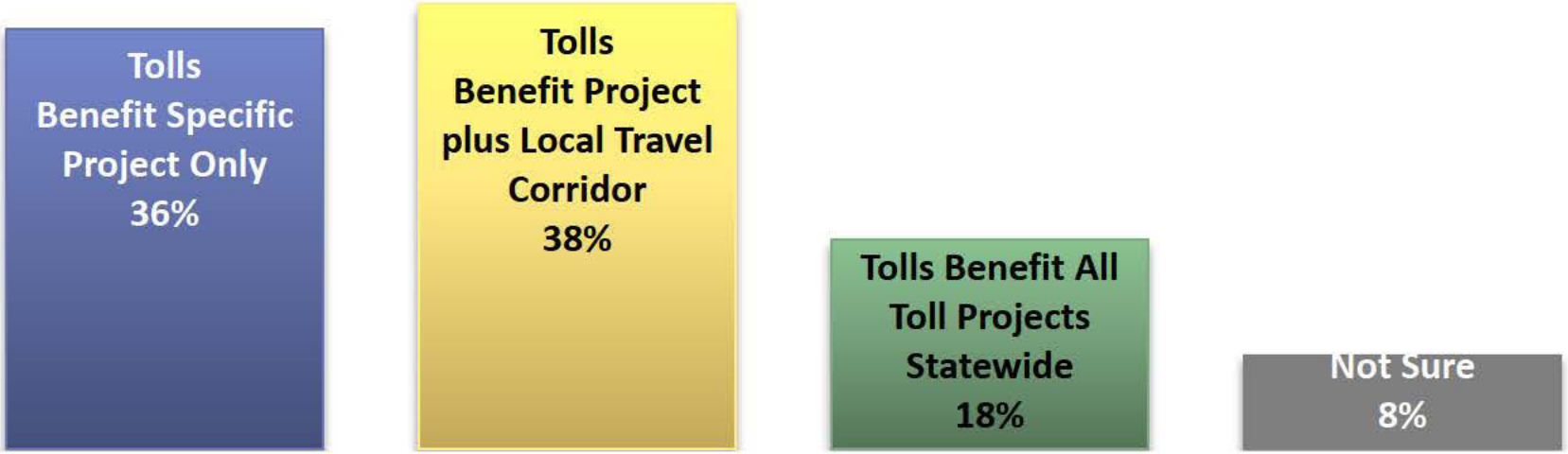
Use of Toll Revenue

Which of the following statements on the use of toll money is closest to your opinion:

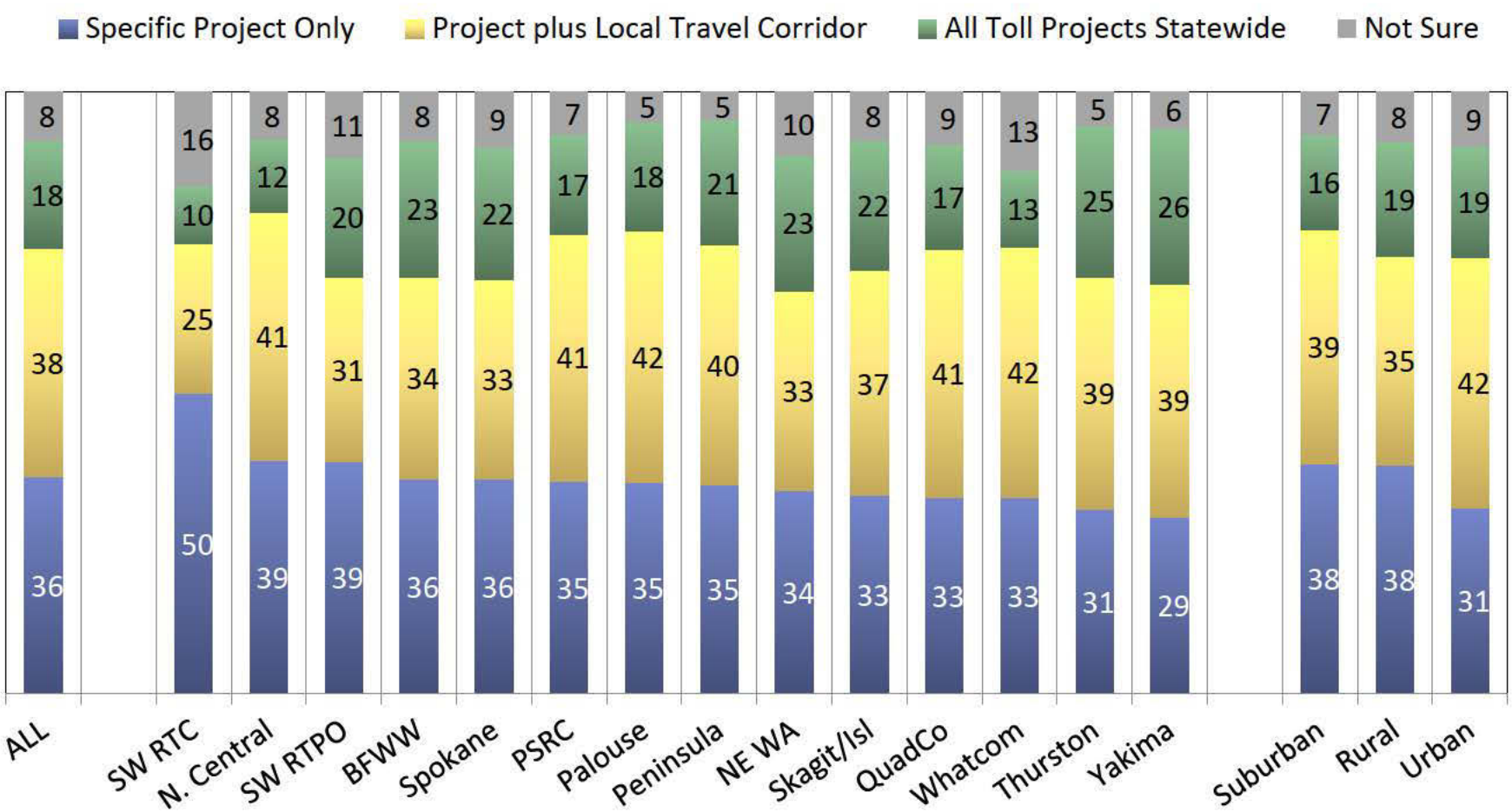
Tolls Benefit Specific Project Only: Toll money should only be used for the construction and maintenance of the specific road or bridge where the toll is collected. For example, tolls collected on the SR 520 bridge should only be used for construction and maintenance of the SR 520 bridge.

Tolls Benefit Project plus Local Travel Corridor: Toll money should be available to fund maintenance and improvements on roads and bridges within the travel corridor. For example, tolls collected on the SR 520 bridge could be spent on the SR 520 bridge AND the 520 highway and I-5 and I-405 connections to the 520 bridge.

Tolls Benefit All Toll Projects Statewide: Toll money should not be limited to any specific toll project or corridor. Money should be pooled and used to benefit all toll projects in the state. For example if the SR 520 bridge and I-90 bridge were tolled the money would be combined and dedicated to helping fund and operate all toll projects statewide.



Use of Toll Revenue by RTPO



Majority "Corridor" or "All Toll Projects" in 13 of 14 RTPOs.

Contact Info

THANK YOU!

For More Information Contact:

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360.705.7070