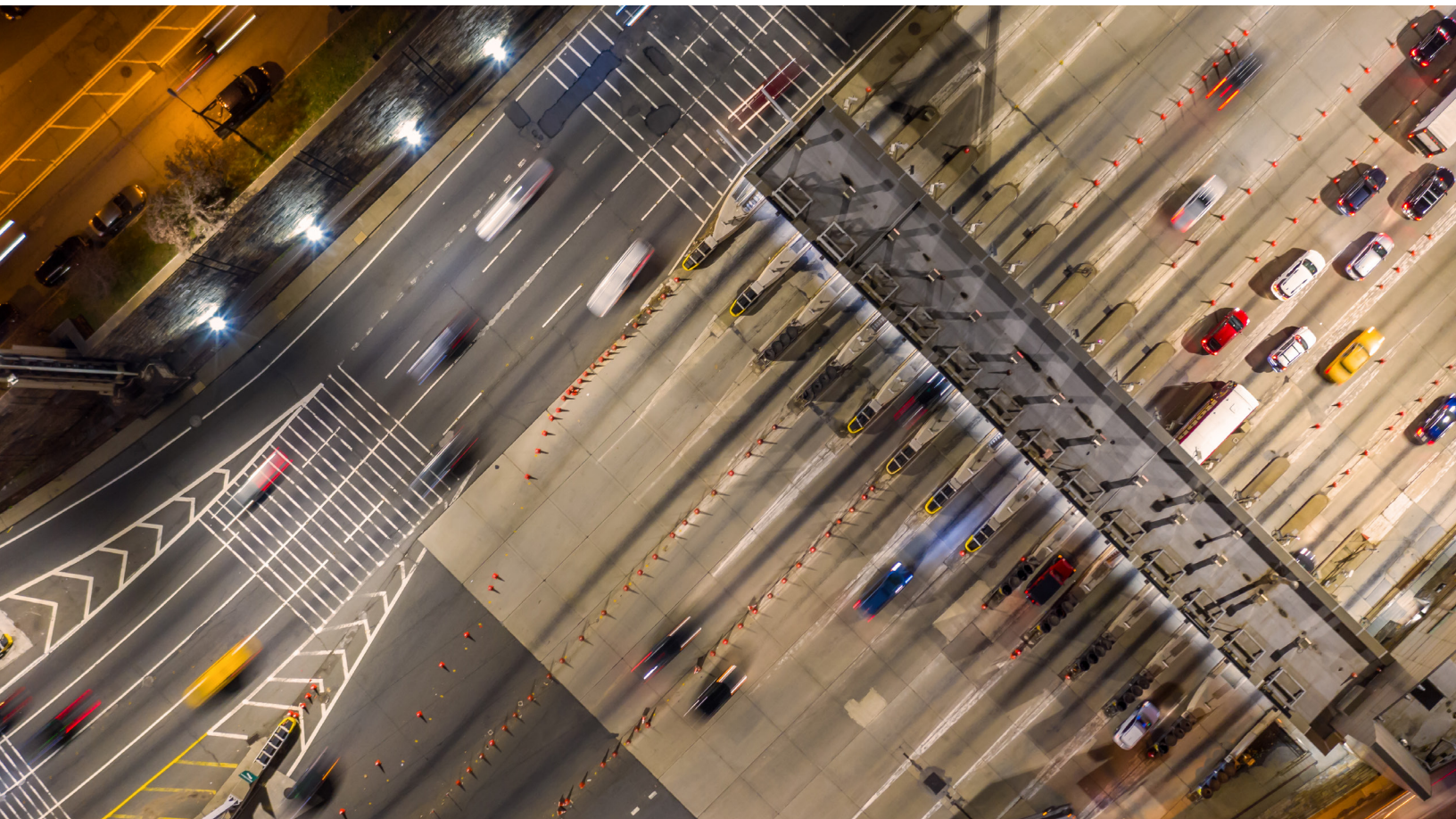




Americans' Perceptions of Road Usage Charging and Toll Roads

With the rise of electric vehicles, the U.S. is already seeing a drop in infrastructure funding sourced from gasoline taxes. A 2025 survey by Verra Mobility examines consumer opinions about how their roadways and infrastructure are funded including taxes, congestion pricing, road usage charging and toll roads.



Overview

The U.S. is experiencing a fundamental shift in how we fund infrastructure improvements and expansions. Toll roads, and more recently, initiatives like New York City's congestion pricing program have demonstrated that user-based funding models can be highly effective. These models generate reliable revenue but also offer drivers faster, safer, and more reliable travel.

The U.S. national highway system spans nearly 161,000 miles connecting cities and towns of all sizes across the country. These roads are in constant need of maintenance and improvements, which require significant, sustained investments.

One of the main sources of funds to improve roads and bridges in the U.S. since 1931 has been the federal gas tax, which currently adds 18.4 cents per gallon for gasoline and 24.4 cents per gallon for diesel. However, this source of funding is threatened with the rise of fuel-efficient hybrids and electric vehicles (EVs). For example, in Pennsylvania, the Pennsylvania Petroleum Association reported an estimated drop in gas tax revenue of \$250 million when comparing 2024 to 2019.

According to projections from the Congressional Budget Office, the Highway Trust Fund is expected to begin facing annual shortfalls of about \$20 billion by 2028, ballooning to a deficit of \$241 billion by 2033.

There are 32 toll operators across 33 states that handle nearly 10 billion transactions annually, according to IBTTA. This generates more than \$25 billion per year.

Verra Mobility surveyed 2,000 people who reside in states with toll roads to gain insights into how Americans view toll roads and funding for infrastructure projects. More than three-quarters of respondents said they use toll roads at least once a month.

Road Conditions

[According to the U.S. Department of Transportation](#), the nation's highways and bridges face an \$808.2 billion backlog of investment need.

93% Americans believe that roads are in need of improvements, **with 93% of survey respondents stating that the infrastructure in their state needed to be improved.**

65% Said they would be more willing to pay tolls if they knew revenue was dedicated to infrastructure projects that directly benefited them.

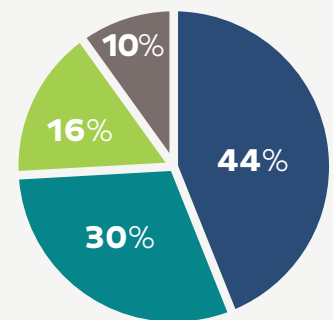
Funding

Highway infrastructure is funded by different and complex means in the U.S., and many states find it difficult to pay for necessary road improvements. Toll roads and variable-fee express lanes are two proven options for generating revenue for infrastructure improvements.

76% Believed paying tolls is acceptable if the revenue is being used to improve the quality and safety of roads and bridges.

How familiar are you with the ways transportation infrastructure projects are funded in your state?

- Somehow familiar
- Not very familiar
- Very familiar
- Not at all familiar



Toll Road Usage

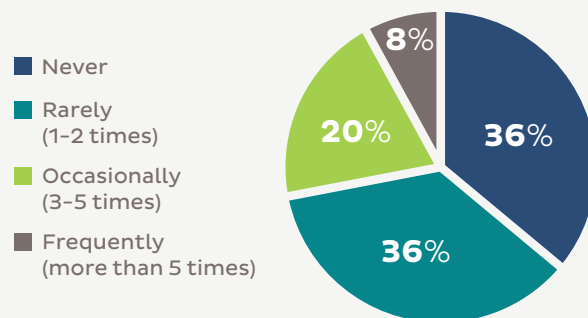
Asked if favor of toll roads as a way to fund transportation projects: 51% were in favor, 30% were neutral and 20% were against.

The survey respondents were generally opposed to variable pricing structures for toll roads.

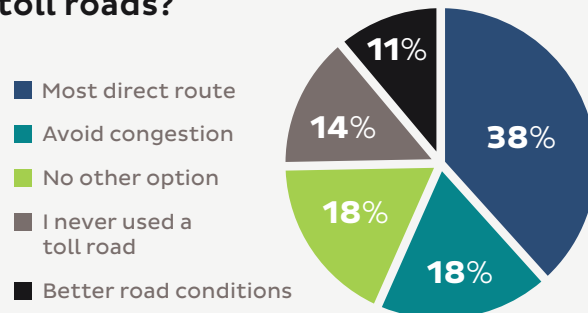
75% Believed drivers should pay the same toll regardless of time of day.

67% Believe tolls should go away once a project is paid for.

How often do you use toll roads in a typical month?



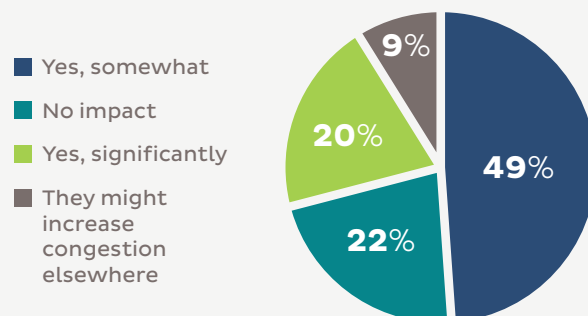
What are the primary reasons you use toll roads?



Reducing Congestion

While there is no one single, easy solution for easing congestion on roadways, tolling can play a significant role. Variable pricing programs can act as an incentive to drive at different times of the day or reduce demand by encouraging carpooling. Our survey questioned whether Americans perceived a congestion benefit from tolling.

Do you believe that toll roads help to reduce traffic congestion on other non-toll roads?



New Road Payment Programs

For years, the traditional toll roads collected a small fee from drivers to access the highway. Today, cities and states are looking at new payment and access models, particularly Road Usage Charging (RUC). RUC essentially charges the driver for the amount of miles driven on the roadway. In other words, a driver pays only for what they use.

More than 50 countries have a road pricing model in place. In the U.S., Oregon became the first state to implement a RUC pricing model in 2015. Today, 35 states are either in the research or active stages of implementing RUC programs. When asked, our survey respondents stated:

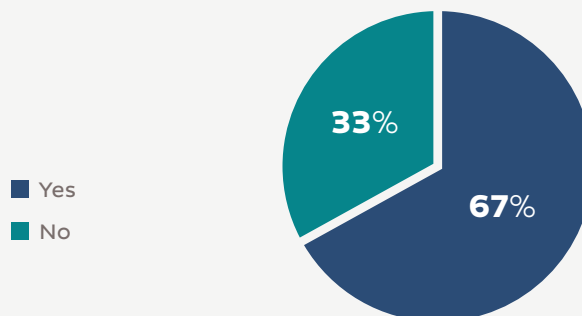
41% Were in favor of road usage charging, with 33% being neutral, 25% were against.

41% Were in favor of congestion pricing, with 31% being neutral, 28% were against.

Paying A Fair Share

Historically, a tax on gasoline has served as a major source of highway infrastructure funding in the U.S. However, that revenue source is declining for multiple reasons. First, gasoline-powered vehicles are becoming more efficient, particularly in form of hybrid vehicles. Second, there has been a slow but steady increase in the adoption of electric vehicles (EVs). Today, more than 40 states enforce a special registration fee for EVs, according to the [National Conference of State Legislatures](#).

Do you believe that toll roads are more fair than a gas tax or tax impacting all drivers?



73% When asked what they believed was the best way to recoup these funds, **73% of Americans answered that EV owners should have to pay an 'energy tax'.**



But, when asked, **"Do you think Americans should have to pay an additional tax when purchasing an EV to make up for lost gas tax revenue?"**
The survey respondents were split 50/50.

Commentary

“This evolution will have a significant impact on drivers and, even more so, on fleet operators, who must navigate a complex network of tolling authorities and payment schemes while staying compliant.”

“As one of the largest payers of tolls in the country, Verra Mobility has a unique perspective on how these programs are rolled out and scaled. With many new funding models now emerging to address the decline in traditional gas tax revenues, we wanted to better understand how Americans view these changes and this survey provides important insight into public sentiment.”



Stacey Moser
EVP and General Manager
Commercial Services,
Verra Mobility

Industry experts are also championing the evolution of infrastructure funding through new means.



Survey Methodology

The data was derived from a survey by Verra Mobility conducted online via Pollfish on June 25, 2025. 2,000 Americans who reside in states that utilize toll roads were surveyed, to ensure more awareness on alternative means of raising funds for road projects. The states included were California, Colorado, Delaware, Florida, Georgia, Illinois, Indiana, Kansas, Kentucky, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, North Carolina, Ohio, Oklahoma, Pennsylvania, Rhode Island, Texas, Virginia, Washington, and West Virginia.

66% of survey respondents said they drive less than 10,000 miles per year, while 22% said they drove between 10,000 and 15,000 miles per year, and 12% said they drove more than 15,000 miles per year.

About Verra Mobility

Verra Mobility Corporation (NASDAQ: VRRM) is a leading provider of smart mobility technology solutions that make transportation safer, smarter and more connected. The company sits at the center of the mobility ecosystem, bringing together vehicles, hardware, software, data and people to enable safe, efficient solutions for customers globally. Verra Mobility's transportation safety systems and parking management solutions protect lives, improve urban and motorway mobility and support healthier communities. The company also solves complex payment, utilization and compliance challenges for fleet owners and rental car companies. Headquartered in Arizona, Verra Mobility operates in North America, Europe and Australia.

Verra Mobility's Commercial Services business provides integrated toll and violation management solutions and title and registration services for rental car companies, fleet management companies, corporate fleets, rental car operators, OEMs, car dealerships and financial services.

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