

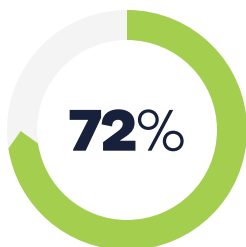


Connectivity Has Crossed Into the Mainstream



WHAT THE 2026 VERRA MOBILITY CONSUMER SURVEY

means for connected vehicle
platforms, fleet operators, OEMs
and mobility-service providers



expect their next vehicle
to function like a
smartphone



actively use at least one
manufacturer-provided
connected service



**would share driving/
location data** for tangible
benefits

The 2026 survey shows connectivity becoming a baseline consumer expectation while monetization, understanding and trust are developing at a different pace. Together, the findings capture a market shifting from awareness of connected features toward questions of everyday utility, value and confidence.

Based on a national Pollfish survey of 2,000 U.S. adults who own or lease a 2019-or-newer vehicle; comparison points reference Verra Mobility's 2024 baseline survey.

OVERVIEW

Connected vehicles are becoming an increasingly established part of how people drive and what owners expect from their vehicles. Verra Mobility's 2026 national consumer survey found that 72% of respondents expect their next vehicle to function more like a smartphone, with services built directly into the driving experience. More than half, 54%, already use at least one manufacturer-provided connected service, up from 49% in 2024.

Connectivity is tied to what it can provide for the driver. Consumers showed the greatest interest in services that address everyday needs, with safety, maintenance, and payments among the most appealing uses. Nearly three-quarters, 72%, said they would value trip assistance that could help them find parking, fueling or charging, and tolling along the way.

Tolling is one area where that convenience is already easy for consumers to understand. More than half, 51%, are comfortable with their vehicle automatically paying for tolls and parking. And 66% would share driving and location data in exchange for tangible benefits, including automatic toll payments and emergency services.

The findings point to a shift in how connected services fit into the vehicle experience. Drivers are looking for technology that makes a trip easier, safer, and more convenient, not connectivity for connectivity's sake. Services that simplify routine parts of driving, from maintenance alerts to toll and parking payments, are increasingly aligned with what consumers say they value.



THE CONNECTED VEHICLE MARKET HAS ENTERED ITS NEXT PHASE

Connected vehicles are no longer a future-facing concept for most American drivers. The 2026 Verra Mobility survey finds that connectivity is increasingly expected in the next vehicle purchase, active use has moved above 50%, and younger drivers are adopting connected services at substantially higher rates than older cohorts. At the same time, familiarity with the category is growing faster than complete understanding of what connected vehicles actually do.

That combination makes the current market more complex than a simple adoption story. The survey points to several tensions developing at once: strong demand for embedded convenience and safety, selective willingness to pay for subscriptions, uneven enthusiasm for in-vehicle payments, and a stable willingness to exchange data for value even as concern about data collection rises.

For the connected vehicle and fleet ecosystem, these findings provide a snapshot of how consumer expectations are evolving across the services that increasingly sit between the vehicle, the driver and the road. The sections that follow examine those shifts across adoption, generational behavior, practical use cases, payments, subscriptions and data trust.

CONNECTIVITY IS BECOMING A BASELINE VEHICLE EXPECTATION

The strongest signal in the survey is not simply awareness or usage. It is expectation. Nearly three in four (72%) respondents expect their next vehicle to behave more like a smartphone, with apps and services embedded into the experience. More importantly for OEM product planning, 51% say connected features would influence them to choose a different make, model or higher trim level.

That changes the strategic role of connected services. Historically, connectivity could be positioned as an added feature set or premium technology package. The 2026 data suggests it increasingly belongs in the same category as infotainment quality, safety systems and convenience features: a visible component of perceived vehicle value.

69% are familiar with the term "connected vehicle"

43% define a connected vehicle as one that is connected to the internet, can connect to a smartphone device, and can directly communicate with outside systems

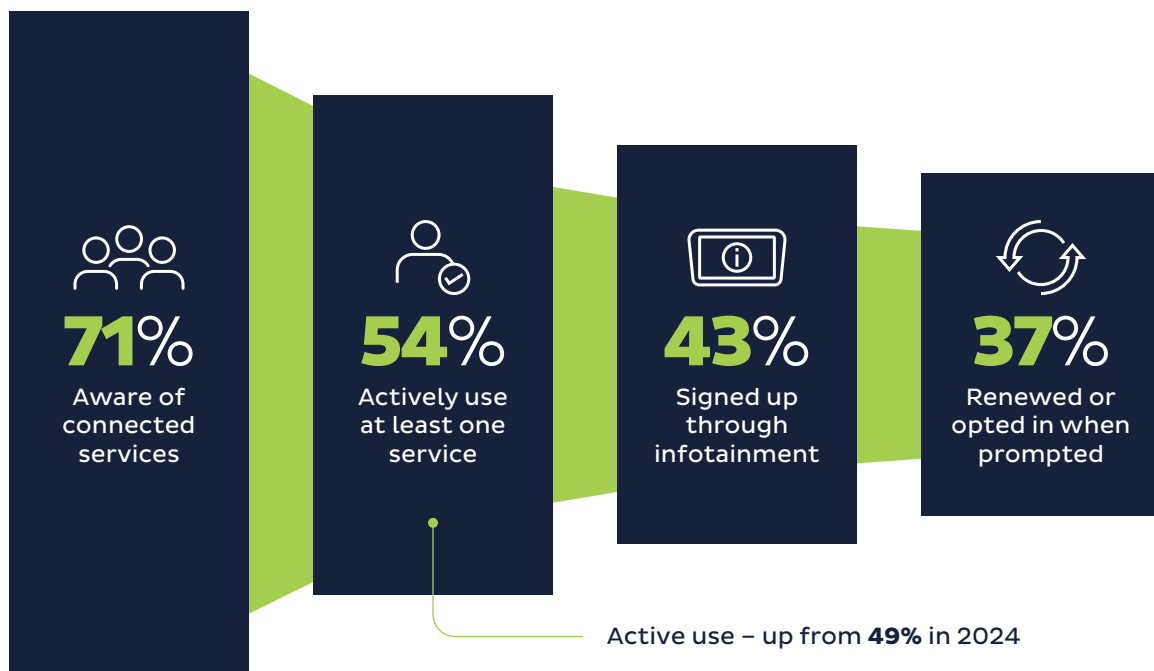
The gap between familiarity and full understanding matters. The category has entered mainstream vocabulary faster than consumers have developed a complete mental model of what a connected vehicle actually encompasses. For the industry, that creates both freedom and risk: providers can still shape the category around useful experiences, but confusing terminology or fragmented propositions can quickly erode trust.

FROM AWARENESS TO ACTIVE USE

Active usage has crossed the majority threshold: 71% are aware of connected services available through their vehicles while 54% of respondents now use at least one manufacturer-provided connected service (up from 49% in 2024). At the same time, 43% have signed up through the infotainment system and 37% have renewed or opted in when prompted.

The shape of this funnel is important. Awareness is relatively high, but activation, subscription, and renewal lag behind it. The largest remaining gaps now sit between knowing that a service exists, activating it and continuing to use it - making conversion and retention more visible parts of the connected-service story than top-of-funnel awareness alone.

Connected Vehicle Awareness and Use

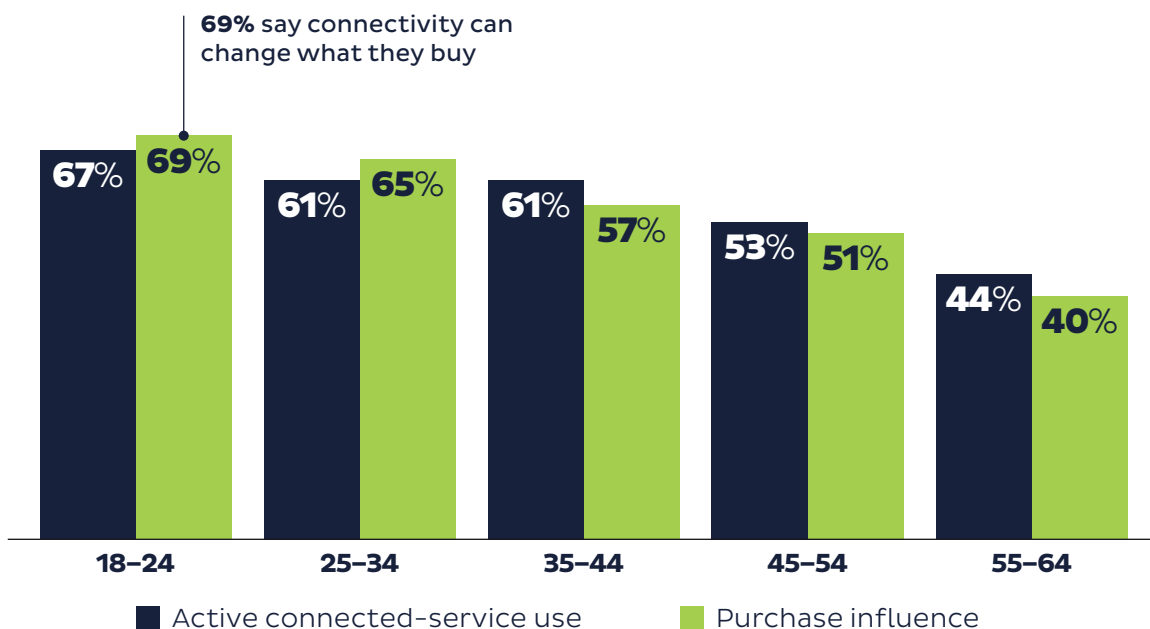




YOUNGER DRIVERS ARE DEFINING THE FUTURE DEMAND CURVE

Every major adoption indicator tilts toward younger drivers. Two-thirds of 18-24-year-olds actively use connected services, compared with 44% of those 55-64. Purchase influence shows an even wider spread: 69% of 18-24-year-olds and 65% of 25-34-year-olds say connected features could motivate them to choose a different make or higher trim, versus 40% of 55-64-year-olds.

Connectivity Influences Younger Generations' Purchase Decisions



PRACTICAL UTILITY WINS: SAFETY, MAINTENANCE AND FRICTIONLESS TRAVEL

Consumers are most interested in connected services when those services solve concrete problems. Safety ranks first when respondents are asked which service category is most appealing if cost is not a factor, followed by maintenance and payments. In parallel, 72% would value proactive trip suggestions that help locate parking, fuel or charging and handle tolls, while 59% believe connected vehicles make driving safer.



Services Consumers Prefer in Their Connected Vehicle:

1 SAFETY
accident/
theft detection **31%**

2 MAINTENANCE
tire pressure/
oil-change alerts **25%**

3 PAYMENTS
tolling/gas/
parking/drive-thru **16%**

4 CONVENIENCE
locks/windows/
reminders **16%**

5 LOCATION DATA
parking/find my car **9%**

**6 City planning /
traffic optimization** **4%**

These preferences frame connected value in practical terms rather than technical ones. Drivers respond to outcomes such as accident detection, maintenance alerts, trip assistance and automatic transactions more readily than to connectivity as an abstract capability. Many of the same service categories also overlap with long-standing concerns around safety, uptime, payments and driver experience.

ONE CONNECTED EXPERIENCE, MULTIPLE EVERYDAY PAYMENTS

Half of respondents (51%) say they are comfortable with their vehicle automatically paying for tolls and parking, while 44% find the broader concept of an in-vehicle digital wallet appealing. These findings point to an opportunity to make connected vehicle services more useful by bringing common driving-related transactions into a single, integrated experience.

Rather than relying on separate apps, accounts or payment methods for each part of a trip, a connected vehicle service that supports tolling, parking, fueling and charging could provide drivers with a more seamless way to manage payments from the vehicle. This aligns with the 72% of respondents who said they would value a vehicle that proactively helps with trip needs such as finding parking, locating fuel or charging stations and handling tolls. Together, the findings highlight the value consumers place on convenience as connectivity becomes more integrated into the driving experience.

72% want their vehicle to offer timely trip suggestions like parking, fueling and tolling

Payment Indicators

	2026
 Comfortable with auto-paying tolls/parking	51%
 Digital wallet concept appeal	44%
 Prefer toll payment via connected vehicle service	16%
 Prefer physical tolling device	40%
 Prefer cash or credit card for tolls	32%



SUBSCRIPTION FATIGUE RAISES THE BAR FOR MONETIZATION

The survey suggests that consumers are not categorically opposed to paying for connected features, but they are selective. 41% say they would avoid monthly fees whenever possible, while 42% would pay monthly only for select features they truly value. Just 17% are open to paying monthly for a wide range of vehicle features.

Price tolerance reinforces the selectivity. Among respondents willing to pay, 64% cap their willingness at under \$10 per month, while 33% would pay \$11-\$39 and only 4% would pay more than \$40. The results show a relatively narrow consumer price band for recurring connected-vehicle services.*

Subscription Attitude

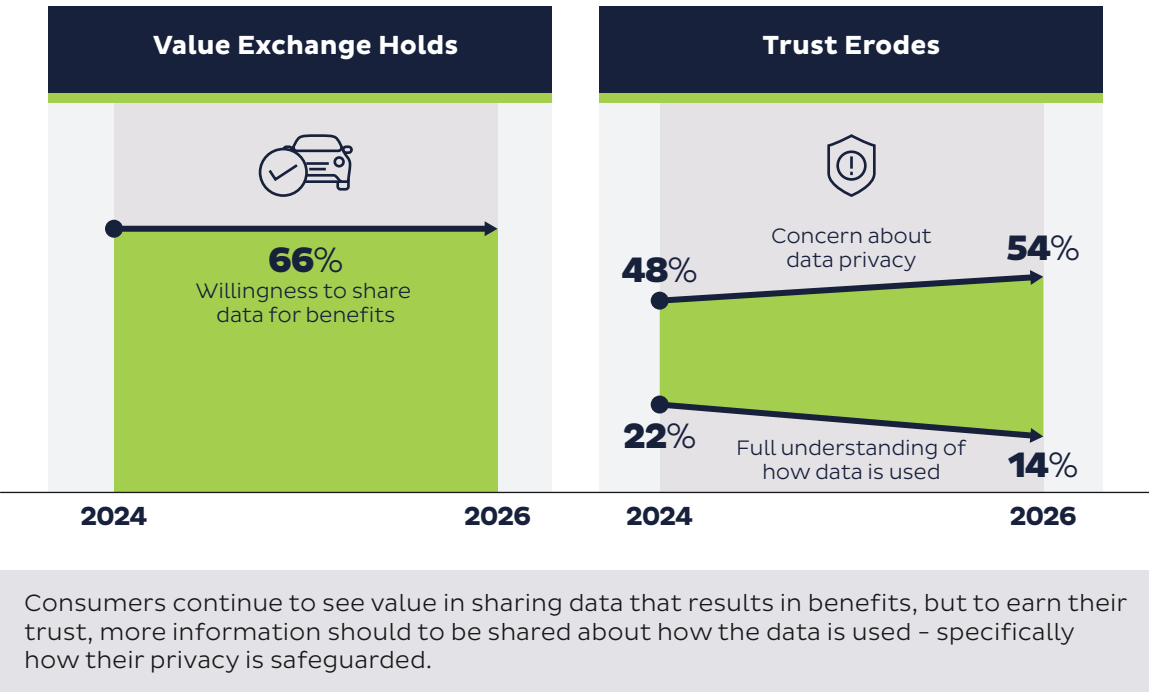
		Share
	Avoid monthly fees whenever possible	41%
	Pay monthly only for truly valued features	42%
	Open to paying monthly for a wide range of features	17%

*The term 'connected vehicle services' was defined as services that are accessed using the vehicle's embedded communications, not a mobile device.

DATA-FOR-VALUE STILL WORKS, BUT THE TRUST GAP IS WIDENING

Perhaps the most strategically important tension in the findings is that willingness to exchange data for value remains stable even as understanding declines and concern rises. 66% would share driving and location data for benefits such as insurance discounts, automatic toll payments and emergency services – essentially unchanged from 2024. But only 14% say they fully understand what data their vehicle collects, down sharply from 22%, while 54% now express at least some concern.

Value vs. Trust



The combination suggests that willingness to share data and confidence in data practices are not moving together. Consumers continue to accept data exchange when a tangible benefit is present, even as fewer say they fully understand what is collected and more express concern about collection practices.

KEY TAKEAWAYS

Across stakeholder groups, the survey points to a category that has moved beyond basic awareness while still showing meaningful gaps between expectation, usage, monetization and trust. These signals summarize where the category stands as connected services become a more established part of the vehicle experience.

Key Takeaways for Connected Vehicle Stakeholders

	What the survey shows	Market context
 OEMs / vehicle brands	72% expect their next vehicle to function like a smartphone; 51% say connected features could influence make, model or trim choice.	Connectivity is increasingly part of perceived vehicle value rather than a niche technology add-on.
 Connected-services platform	Awareness reaches 71%, compared with 54% active use, 43% infotainment sign-up and 37% renewal or opt-in.	The largest drop-offs now appear between awareness, activation and continued use.
 Payments / tolling / parking	51% are comfortable with automatic toll and parking payments, while digital-wallet appeal is 44%, down from 51% in 2024.	Interest is stronger for specific automated transactions than for the broader wallet concept, while familiar payment methods remain resilient.
 Data / telematics ecosystems	66% would share data for tangible benefits, but only 14% fully understand what is collected and 54% express at least some concern.	The value exchange remains intact even as understanding declines and concern rises.



Methodology and Editorial Notes

Verra Mobility's 2026 national survey was conducted via Pollfish among 2,000 U.S. adults who own or lease a 2019-or-newer vehicle. Where noted, results are compared with Verra Mobility's 2024 baseline survey. Percentages in this report use the supplied survey findings; minor rounding differences may occur when figures are expressed as whole numbers in external communications.

Percentages throughout this report are rounded to the nearest whole number for consistency. Comparisons with 2024 should be read as trend indicators where question wording and respondent definitions are comparable.