

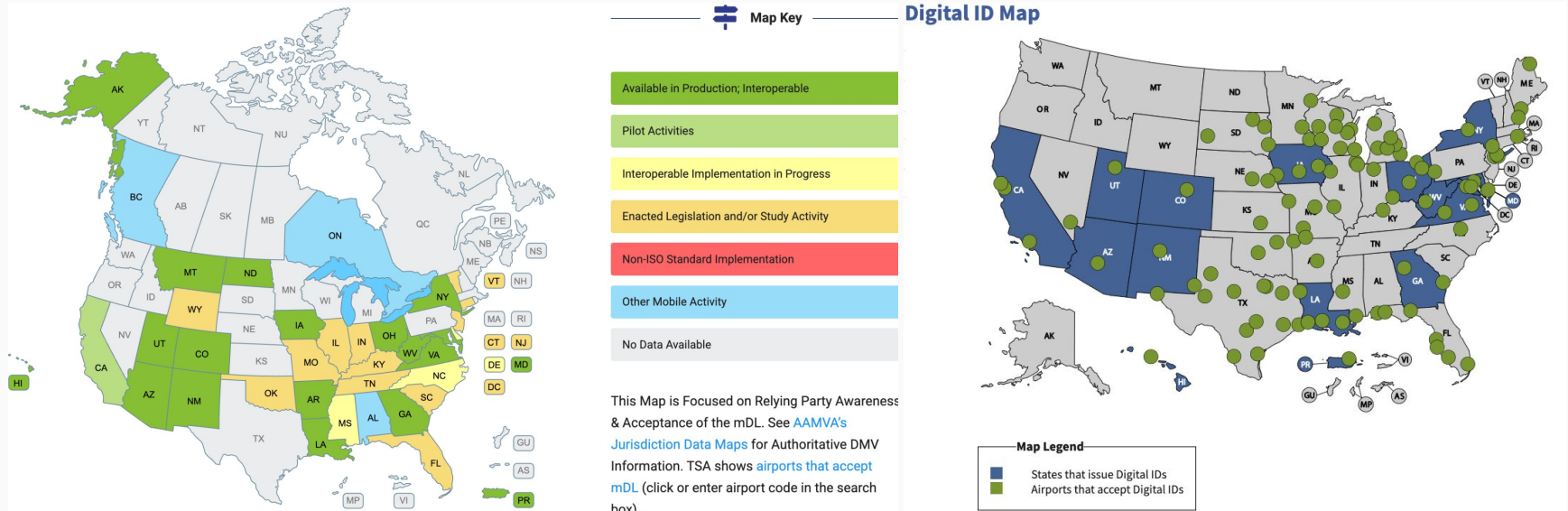
Momentum for mDL in U.S.

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US mDL Rollouts...Today

October 2025

Transportation Security Agency for Domestic Travel



Q3 2025 - mDL Holders went from 5% to 7% of cardholders in 20 production states (next slide)

Q4 2025 - Now 22 Issuers and 7+% of those cardholders

Momentum: mDL Adoption Statistics

Jurisdiction	Approx. mDLs (ISO-18013-5)	Licensed Drivers (2023)	Conversion Rate
Alaska	4,256	525,195	1%
Arizona	1,227,833	5,849,992	21%
Arkansas	48,823	2,306,921	2%
California*	3,298,298	27,742,348	12%
Colorado**	239,037	4,486,899	5%
Delaware****	54,111	886,022	6%
Georgia	595,692	7,691,537	8%
Hawaii	34,782	943,671	4%
Illinois (new)	276,537	8,631,485	3%
Iowa	163,000	2,379,791	7%
Kentucky (new)		3,001,191	0%
Louisiana***	71,600	3,404,603	2%
Maryland	386,029	4,331,165	9%
Montana	21,372	878,798	2%
New Mexico	80,049	1,540,741	5%
New York	298,404	12,314,191	2%
N Dakota (new)	7,201	580,918	1%
Ohio	575,000	8,436,370	7%
Puerto Rico	80,186	3,206,000	2%
Utah	122,303	2,299,291	5%
Virginia	72,285	5,921,532	1%
West Virginia	22,178	1,131,687	2%
	7,679,380	108,490,348	7.1%

USA - 2025 EOY - 7.1%

2% Growth, 3 New Issuers per Quarter in 2025

Aggressive Projection: up to 100M mDLs in circulation during 2026



Active mDLs

Eligible users

142MM

AK, AR, AZ, CA, CO, DE, GA, HI, IA, KY, LA, MD, MT, MS, ND, NM, NY, OH, PR, UT, VA, WV



mDLs in progress

Eligible users

135MM

CT, FL, ID, IL, IN, KY, MI, MO, MT, NE, NV, NH, NJ, NC, ND, OK, TN, TX, VT, WY

Source Trinsic ID

Why? 2 Growth Factors -> +Enrollments +States@0%

* California is legislatively limited; Statistics shown as of 12/31/2025

** Colorado count not including the flash pass

*** Louisiana count not including the flash pass

**** Delaware count not including the flash pass

243,350,000 DLs in 2023 and about 89% of Americans ages 25 & older have a DL

Source: [American Association of Motor Vehicle Administrators \(AAMVA\)](#)

Delays to Building Relying Party Acceptance of mDL



Awareness

- No advertising budget
- People don't "follow" their State DMV
- Speaking to a closed circle of identerati
- "Pull" within this market comes from the Relying Parties and places to use mDL (chicken-egg)
- Lack of Federal Coord
- Small Scale Market Dev



Delay or Indecision

- ⌚ "Competing Standards" and Noise in the Market
- ⌚ Waiting for statistics & not understanding 7-8%
- ⌚ Technology mismatch forcing refresh
- ⌚ Lack of integration into POS, LE vehicles, etc.
- ⌚ Lack of approval for RP use cases from Wallets w/ Developer Programs



Resistance

- 🔒 "No phone home" working to create unresolved fears fears
- 🔒 General "Digital Identity will track you" - percentage is sizable (dystopian literature)
- 🔒 Cannot get Executive approval for ROI
- 🔒 Few Case Studies

Thank you!

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