

An aerial photograph of a city skyline, likely New York City, featuring numerous skyscrapers and a river. A semi-transparent teal rectangle is overlaid on the left side of the image. A white network diagram, consisting of dots connected by lines, is superimposed over the entire image, extending from the teal rectangle into the city view.

Survey Insights The Lifestyles of Mobile Consumers



RootMetrics®
By IHS Markit

Overview

Mobile connectivity has come a long way from the age of flip phones. With the majority of consumers now connected through a smartphone, tablet or even IoT device, the demand for mobile networks continues to grow.

To better serve mobile users, providers must understand how mobile technologies impact consumers' daily lives. This survey polls U.S. respondents to understand mobile preferences and uses, including:

- **Mobile Shopping Habits** - assessing mobile shopping and the future of mobile pay
- **IoT Appetite** - reviewing consumer interest in smart home devices
- **Mobile Connection** - understanding the impact of a good or bad network connection
- **Mobile Activity** - learning what consumers are doing on their phones

Survey Method



Conducted:
October 24, 2018



1,200 respondents
age 18+ in the U.S.



17-question
mobile survey



Direct to mobile
users via Pollfish



Mobile Shopping

Key Takeaways

Mobile Shopping Is In, But Mobile Pay Is Not



Holiday shopping in 2018 is less about the mall, and more about mobile with the majority of consumers (45%) planning to use their smartphone for online holiday shopping.

Millennials are even bigger fans of mobile shopping, with over half (52%) planning to use a smartphone to purchase the bulk of holiday gifts.



Consumers may turn to mobile for their gift search, but not mobile pay. In fact, almost two in five (37%) don't think mobile pay apps compare in convenience to traditional cash or credit cards.

The only demographic that may be in favor of mobile pay is Millennials. While the majority (36%) agree that an app isn't convenient, one in six (16%) Millennial shoppers would avoid a retailer because they don't have mobile pay capabilities.

Question 1

Of the options below, which best describes why you wouldn't use a mobile payment application (such as an Apple Pay or Android Pay)?

I worry my data would not be secure	36.33%
I have experienced service/connectivity issues using payment apps	10.50%
I don't shop with retailers who accept mobile pay	6.50%
I think using a credit card or cash is easier	37.42%
I don't know	9.25%

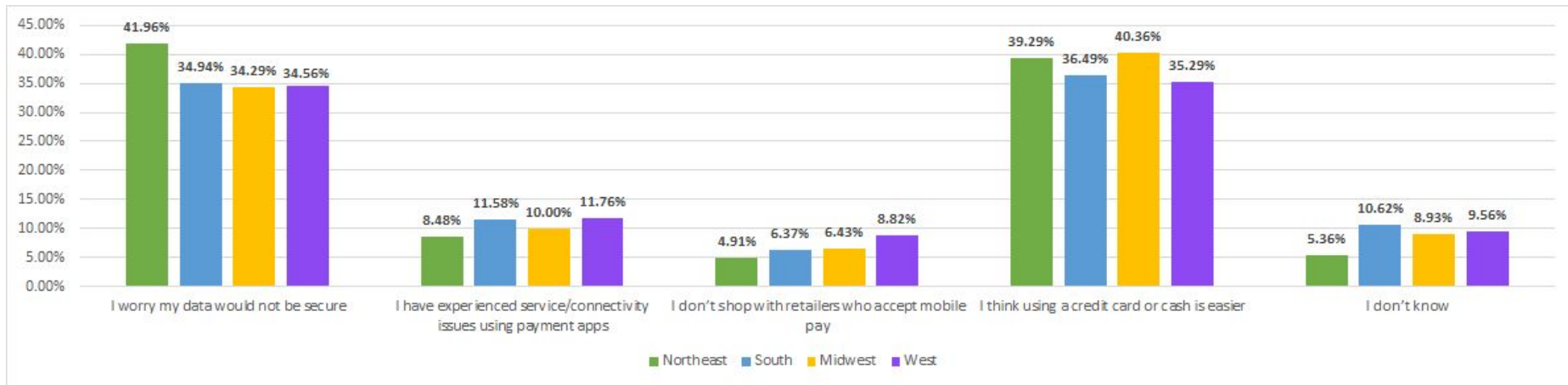
Mobile pay isn't perceived as easy or secure

- Almost two in five (37%) wouldn't use a mobile payment app because they find cash or a credit card is easier.
- Security is the second biggest issue with nearly two in five (36%) expressing concerns that their data wouldn't be secure when using a mobile pay app.
- Slightly more women (39%) than men (36%) found cash or credit to be easier, while more men (12%) than women (9%) were deterred by connectivity issues.

Baby Boomers have little appetite for mobile pay

- Nearly half (44%) of Baby Boomers don't see the convenience of a mobile pay app, noting cash or a credit card as easier.
- Millennials stuck with the status quo, with nearly two in five (36%) not finding mobile pay as easy to use as cash or credit card.

Regional Highlights



The Northeast has security concerns, while the Midwest isn't sold on convenience

- The majority of consumers in the Northeast (42%) worry that their data will not be secure on a mobile pay app, while those in the South (35%), West (35%) and Midwest (34%) were less concerned.
- Those in the Midwest (40%) were the least likely to find mobile pay convenient (NE=39%; S=36%; W=35%).

Question 2

Of the following, which device do you expect to use the most for online holiday shopping?

Smartphone	44.92%
Tablet	6.92%
Laptop or desktop computer	40.75%
Digital assistant (i.e. Amazon's Alexa)	1.50%
I won't use a device to shop this year	5.92%

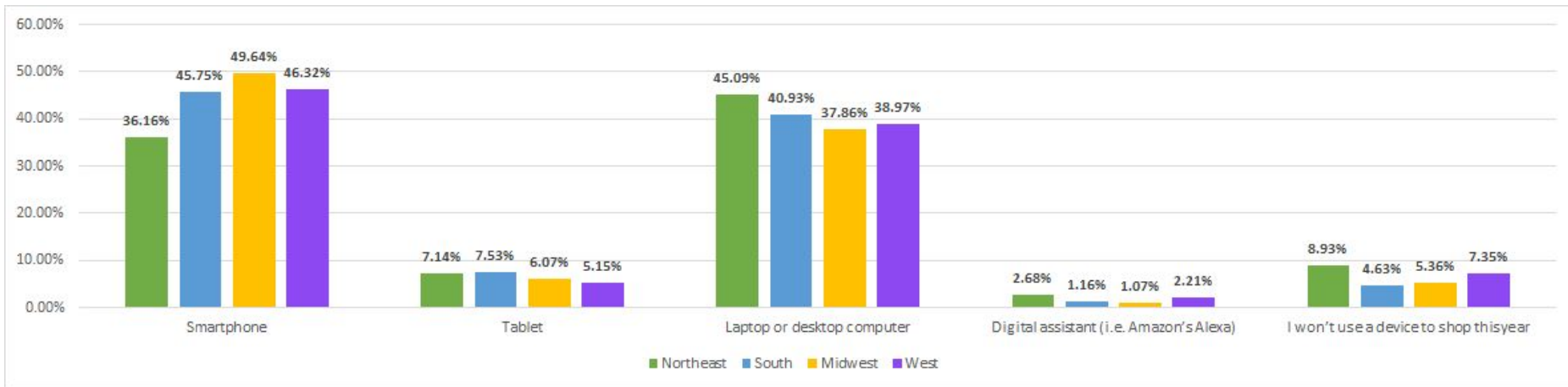
Don't count the laptop out yet for online shopping

- While the majority of consumers (45%) expect to use their smartphone for online holiday shopping, two in five (41%) will still use a laptop or desktop computer.
- Men (43%) are even more likely than women (39%) to use a computer for their online holiday shopping.

Millennials are the mobile-first generation

- Over half (52%) of Millennials will use their smartphone for the bulk of their holiday shopping.
- In comparison, just one in five (19%) Baby Boomers will do the same.
- Baby Boomers are most resistant to online holiday shopping with one in six (16%) not planning to use a device to shop for the holidays.

Regional Highlights



Middle America are the most mobile-friendly shoppers

- Consumers in the Midwest (50%) are most likely to use a smartphone for holiday shopping. Those in the South (46%) and West (46%) are close behind, while just one-third of Northeastern (36%) shoppers agree.
- Residents of the Northeast are still reliant on computers for online holiday shopping, leading laptop or desktop use (45%) versus all other regions (S=41%; W=39%; MW=38%).

Question 3

Do you avoid shopping at stores that don't support mobile pay apps (such as an Apple Pay or Android Pay)?

Yes	13.17%
No	79.33%
I don't know	7.50%

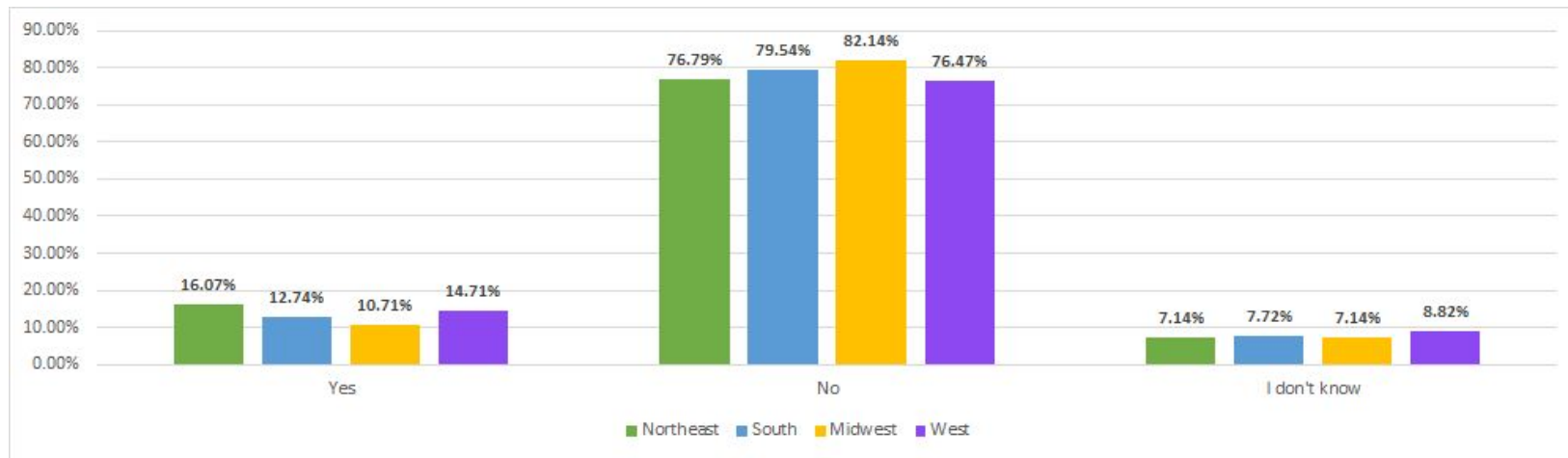
Mobile pay isn't a retail requirement

- Four in five (79%) consumers do not see a lack of mobile pay capabilities as a reason to avoid a retailer.
- Men (79%) and women (80%) agree they wouldn't avoid a retailer without mobile pay capabilities.

Millennials may be starting to see mobile pay differently

- One in six (16%) noted they would avoid a store that didn't have mobile pay, far more than Baby Boomers (5%).
- Millennial women (17%) were even more likely to avoid retailers that couldn't support mobile pay (compared to 15% of Millennial men).

Regional Highlights



Consumers in the Northeast or West are most likely to look for mobile pay options

- Roughly one in six consumers in the Northeast (16%) and West (15%) would avoid a retailer if they didn't offer mobile pay options, leading other regions (S=13%; MW=11%).
- Midwesterners are the least likely to care about mobile pay capabilities (82%).

Thank You.

For inquiries or executive commentary,
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