

An aerial photograph of a city skyline, likely New York City, with a network of white lines and dots overlaid on the image. A large teal rectangular box is positioned in the upper left, containing the title text.

Survey Insights The Lifestyles of Mobile Consumers

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%

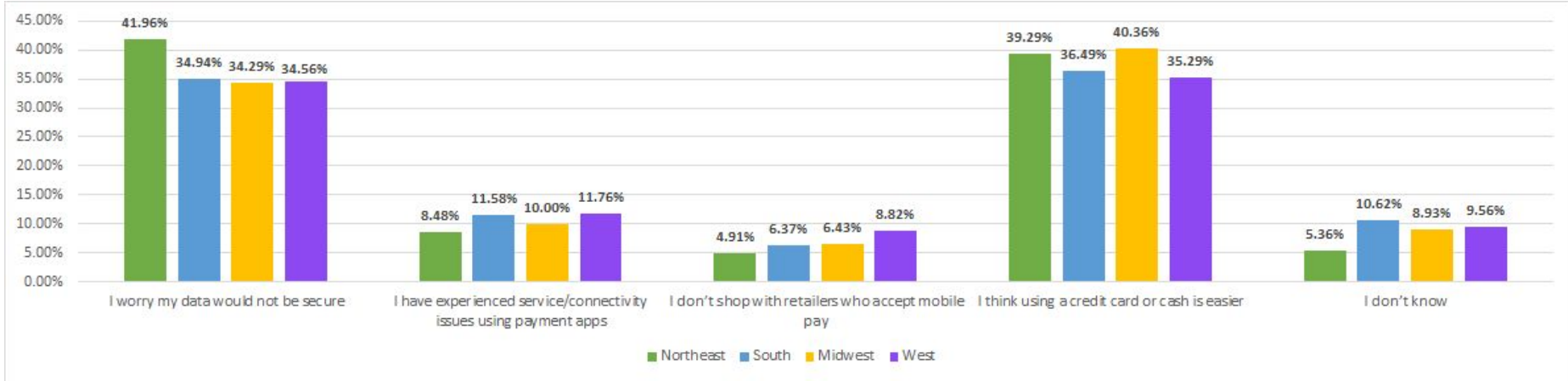
Mobile pay isn't perceived as easy or secure

- 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%

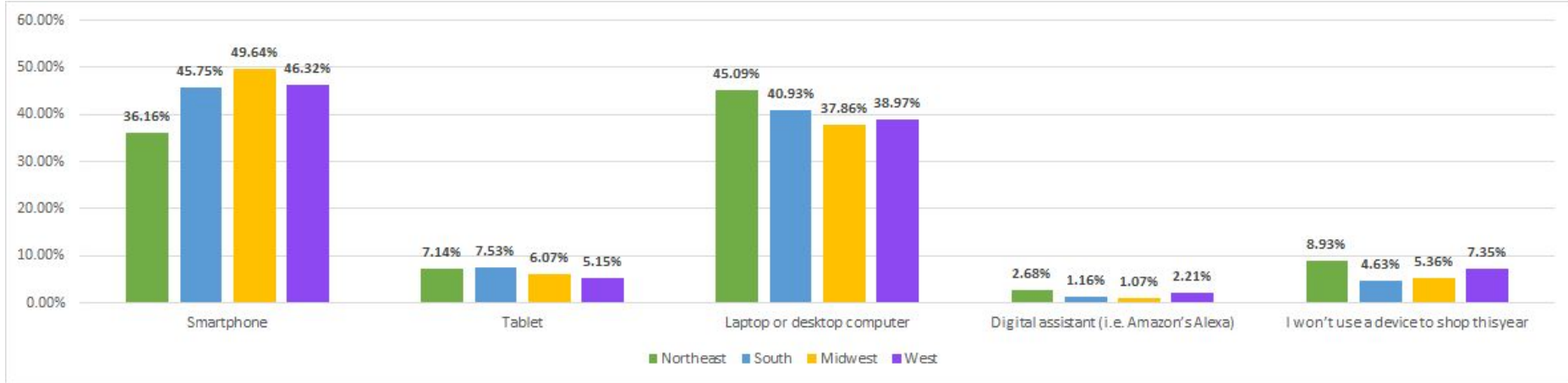
Don't count the laptop out yet for online shopping

- 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%

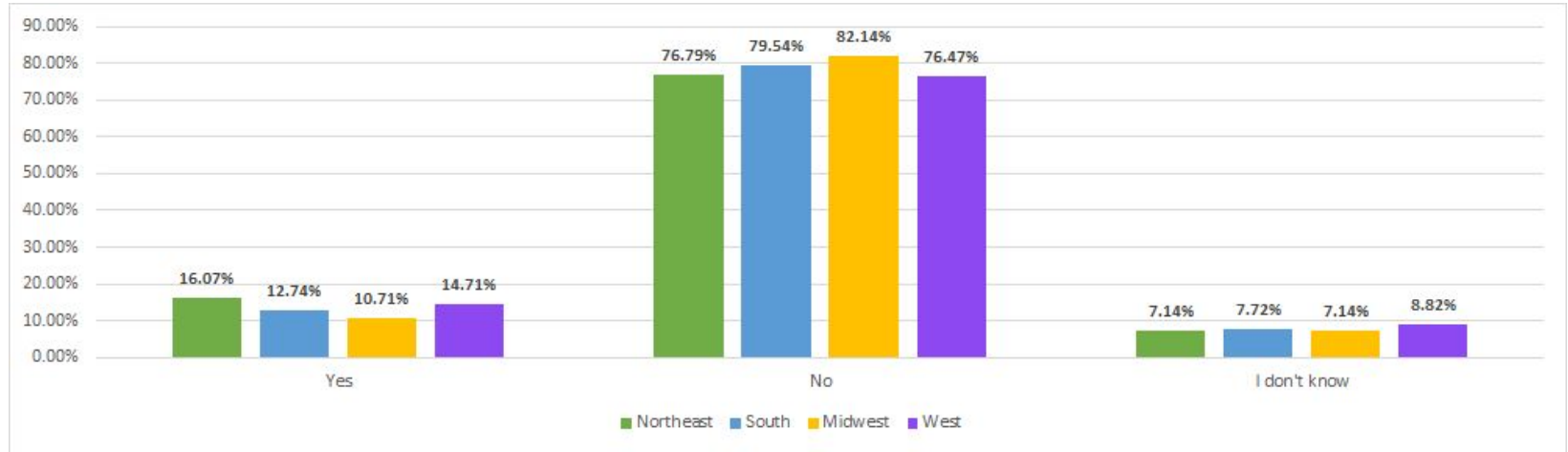
Mobile pay isn't a retail requirement

- 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%).



IoT Appetite

Key Takeaways

Millennials Lead IoT Adoption



Smartphones are driving IoT adoption by helping consumers leverage new technology through familiar interfaces. In fact, nearly one in four (21%) use a smartphone to run an IoT device at least once a day.

However, many still aren't convinced it's time to adopt smart devices. When asked why they wouldn't purchase a connected device, like Alexa or even a smart TV, one in three (32%) say they don't have a need for this technology.



Millennials may be changing things. One in four (26%) already own a connected home device and two in five (39%) control an IoT device with their smartphone at least once a week. One in four (25%) even connect their smartphone with an IoT device every day.

Millennials also understand the relationship between IoT and network connection, with three out of four (75%) agreeing that free WiFi in a city indicates that the area is more technologically advanced.

Question 1

How often do you use your smartphone to run or control an IoT device (such as Amazon's Alexa, Wi-Fi connected vacuums like Roomba, etc)

Three or more times a day	9.00%
Once or twice a day	12.42%
Once a week	10.08%
Once a month	7.50%
Never	55.25%
I don't know	5.75%

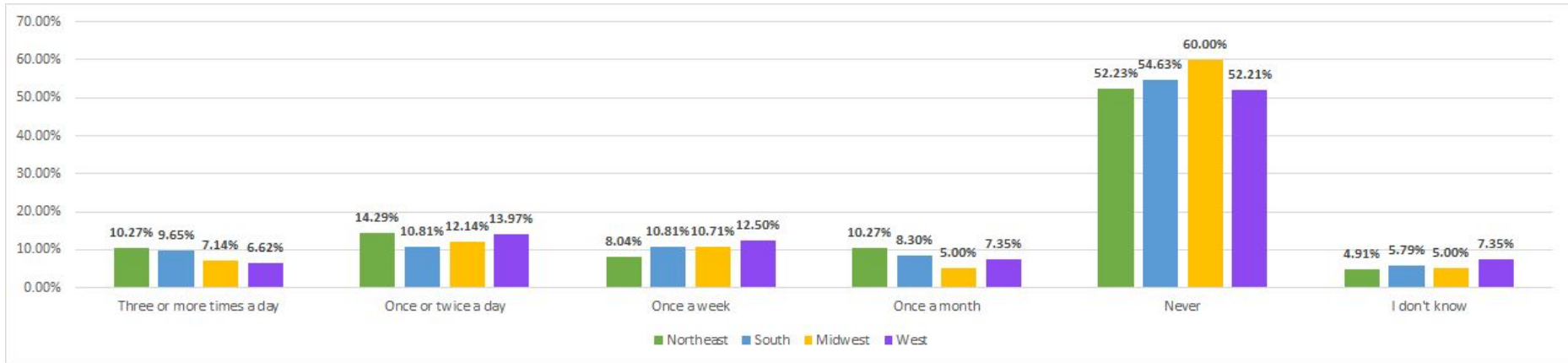
Smartphones are becoming synonymous with IoT

- One in four (21%) use a smartphone to run an IoT device at least once a day.
- Women are more resistant to IoT with three in five (59%) never using a smartphone for IoT (compared to 51% of men).

Millennials are big fans of mobile-powered IoT

- Two in five (39%) control an IoT device with their smartphone at least once a week, including one in four (25%) who do it once a day.
- In comparison, half as many Baby Boomers (15%) use their smartphone to control an IoT device once a week.

Regional Highlights



The Midwest is the least likely to connect to IoT

- Three in five (60%) never use a smartphone to connect to an IoT device, compared to roughly half in the Northeast (52%), South (55%) and West (52%).
- Meanwhile, one in four (25%) in the Northeast use a smartphone to run a IoT device at least once a day.

Question 2

Which of the following best describes why you would NOT purchase a connected home device (such as Alexa, Roomba, smart TV, etc.)

These devices are too expensive	20.42%
I don't have a need for these devices	32.33%
I have security / privacy concerns	18.33%
I already own a connected home device	22.25%
I don't know	6.67%

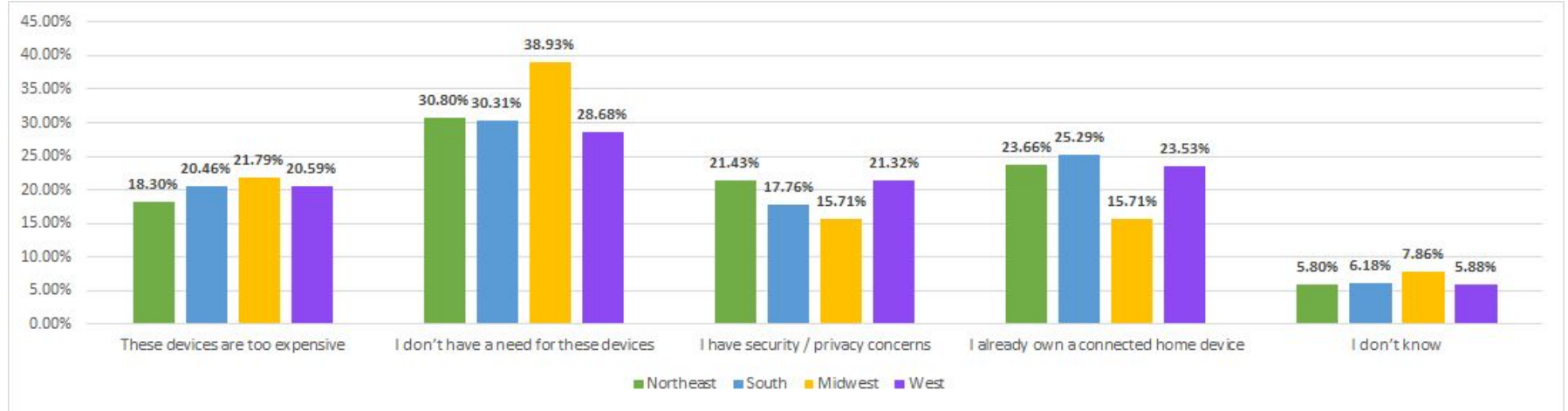
Consumers don't need smart home devices

- One in three (32%) note they don't have a need for connected home devices such as Amazon's Alexa or a smart TV.
- Slightly more women (34%) than men (31%) note they don't need a smart home device.
- One in five (22%) already own a smart home device.

Millennials lead Alexa ownership

- One in four (26%) already own a connected home device, such as Alexa, while just one in six (15%) Baby Boomers are able to claim the same.
- Millennial women (28%) are the most likely to already own a smart home device.

Regional Highlights



Midwesterners aren't rushing to buy smart home devices

- Two in five (39%) don't have a need for connected home devices, while just under one in three in the South (30%), West (29%) and Northeast (31%) agree.
- In fact, one in four in the South (25%), West (26%) and Northeast (24%) already own a connected home device, significantly higher than the Midwest (16%).

Question 3

Do you consider cities that offer free WiFi to be more technologically advanced?

Yes	72.75%
No	18.33%
I don't know	8.92%

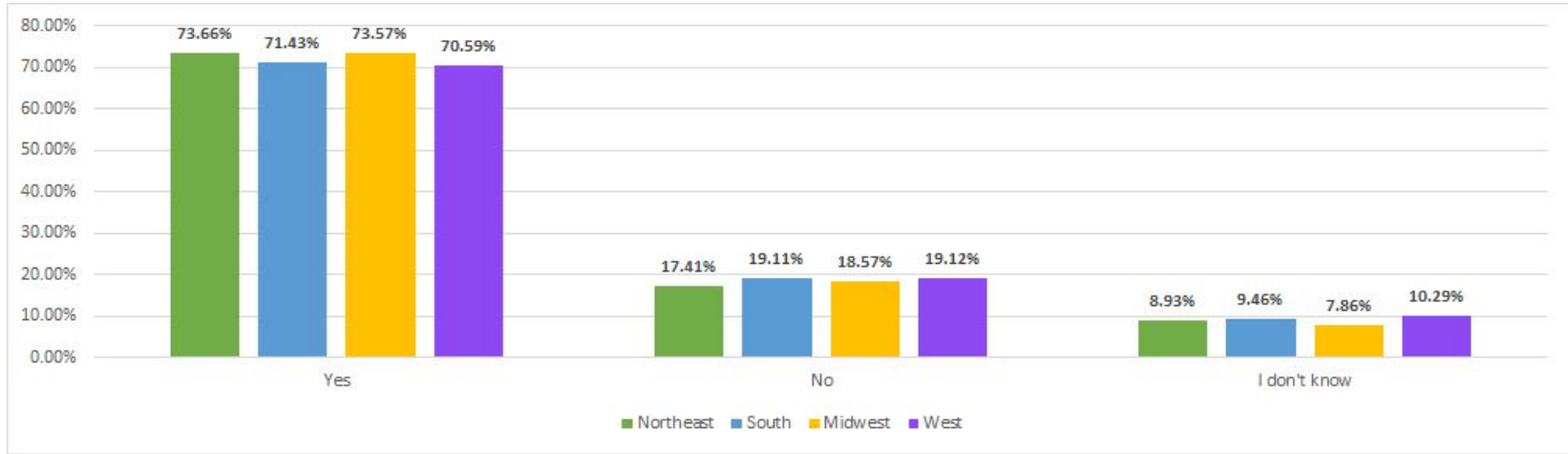
WiFi is an indicator of future smart cities

- Almost three in four (73%) recognize cities who offer free WiFi as more technologically advanced.
- Men (73%) and women (72%) see WiFi capabilities the same.

Baby Boomers are less likely to link WiFi to tech advancement

- Fewer Baby Boomers (69%) than Millennials (75%) find WiFi to be a signal of a technologically advanced city.
- That said, Millennial men (77%) are the most convinced that WiFi is an indicator of tech innovation.

Regional Highlights



The Northeast and Midwest see free WiFi as a tech advancement

- Nearly three in four in both the Northeast (74%) and Midwest (74%) find cities with free WiFi more technologically advanced, ahead of the South (72%) and West (71%).



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Square

Mobile Activities

Key Takeaways

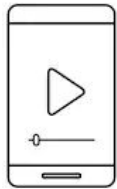
U.S. Mobile Users are Social Bingers



Consumers today are mobile-obsessed. In fact, over half (58%) check their smartphones within the first 10 minutes of their day. Nearly one in four (24%) check it within the first minute of their day.

So, who are mobile consumers really?

- They are social butterflies - one in three (34%) spend most of their time texting, while another one in three (32%) primarily use their phone to check social media.
- They are definitely not gamers - just 15% play seven hours or more a week.
- They love to binge watch - one in five (21%) watch online videos seven hours or more a week.
- They are budding music lovers - one in five (19%) listen to music or podcasts seven hours or more per week.
- They aren't early adopters - over half (56%) will wait to purchase a new device until they have an upgrade.



Question 1

When you wake up in the morning, how long do you wait before you check your smartphone?

Less than one minute	23.42%
5-10 minutes	34.92%
Up to 30 minutes	19.17%
Up to an hour	12.50%
2 hours or more	5.58%
I don't know	4.42%

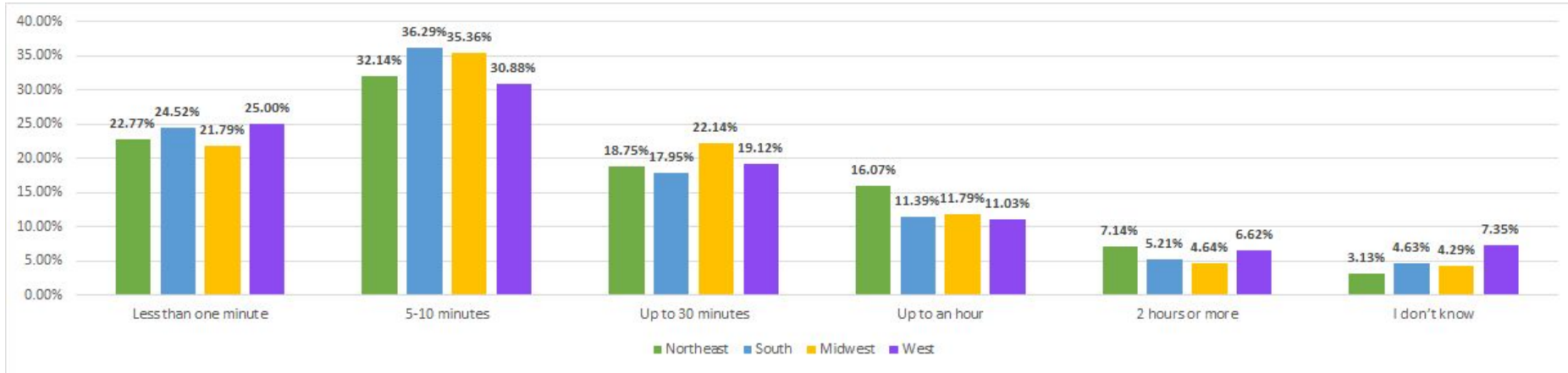
Consumers wake up to their smartphone

- Over half (58%) check their phone within ten minutes of waking up, roughly half (23%) of which check their device within one minute of waking up.
- Men are more likely to check their phone within a minute of waking up (27%) than women (20%).

Millennials check their phones as soon as the sun rises

- One in three (31%) check their phone within one minute of waking up, while less than one in ten (9%) Baby Boomers do the same.
- In fact, one in five Baby Boomers (21%) will wait an hour before checking their phones.

Regional Highlights



Southerners are the most likely to rise with their phone

- One in four (25%) will check their phone within a minute of waking up (NE=23%; MW=22%; W=25%), while another one in three (36%) will check it in the first 5-10 minutes of the day (NE=32%; MW=35%; W=31%).

Question 2

Of the below options, what do you spend the most time doing on your smartphone?

Texting / messaging friends and family	34.33%
Watching videos online (via streaming)	10.92%
Listening to music or podcasts	9.58%
Shopping (online or via mobile pay apps)	8.00%
Checking social media	31.83%
I don't know	5.33%

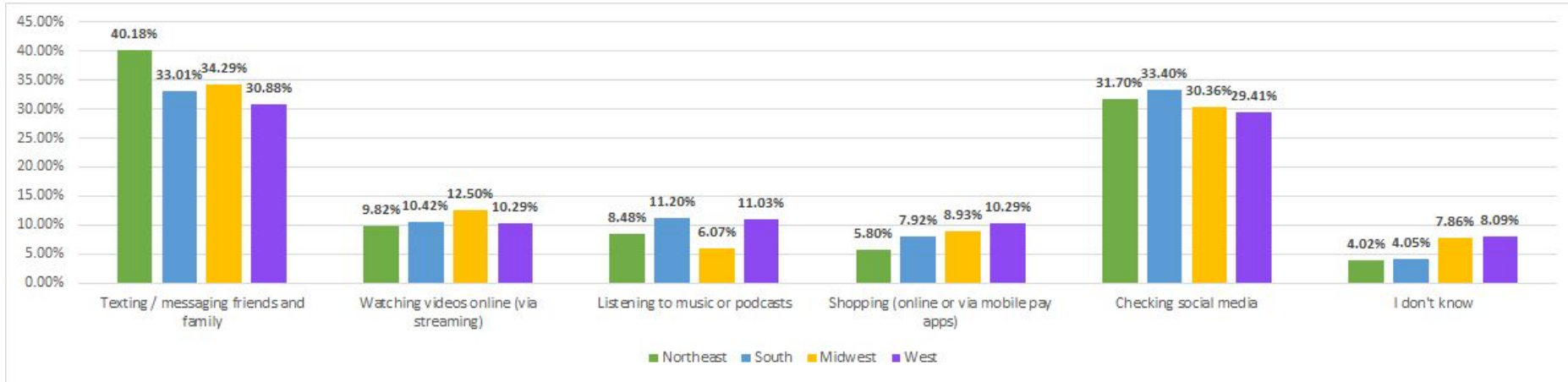
Consumers still use their phones to stay connected

- One in three (34%) spend most of their time on their smartphone texting, while another one in three (32%) primarily use their phone to check social media.
- Women use their phones for more social activities than men:
 - 37% of women text; compared to 32% of men
 - 34% of women check social media; compared to 30% of men
 - 13% of men watch videos; compared to 9% of women
 - 13% of men listen to podcasts/music; compared to 6% of women

Millennials get social; Baby Boomers stay in touch

- Two in four (40%) Millennials primarily check social media, compared to one in four Baby Boomers (19%).
- Meanwhile, over half of Baby Boomers (54%) spend their time texting, compared to one in four Millennials (24%).

Regional Highlights



Northeasters keep in touch

- Two in five (40%) use their smartphone the most to text, significantly higher than the South (33%), Midwest (34%) and West (31%).
- Those from the West (29%) are least likely to use their smartphone for social media.

Question 3

On average, how much time per week do you spend playing live games on your smartphone (via apps like HQ Trivia, or games like Fortnite)?

1-2 hours	28.92%
3-5 hours	15.75%
7-10 hours	9.00%
More than 10 hours	5.75%
None of the above	40.58%

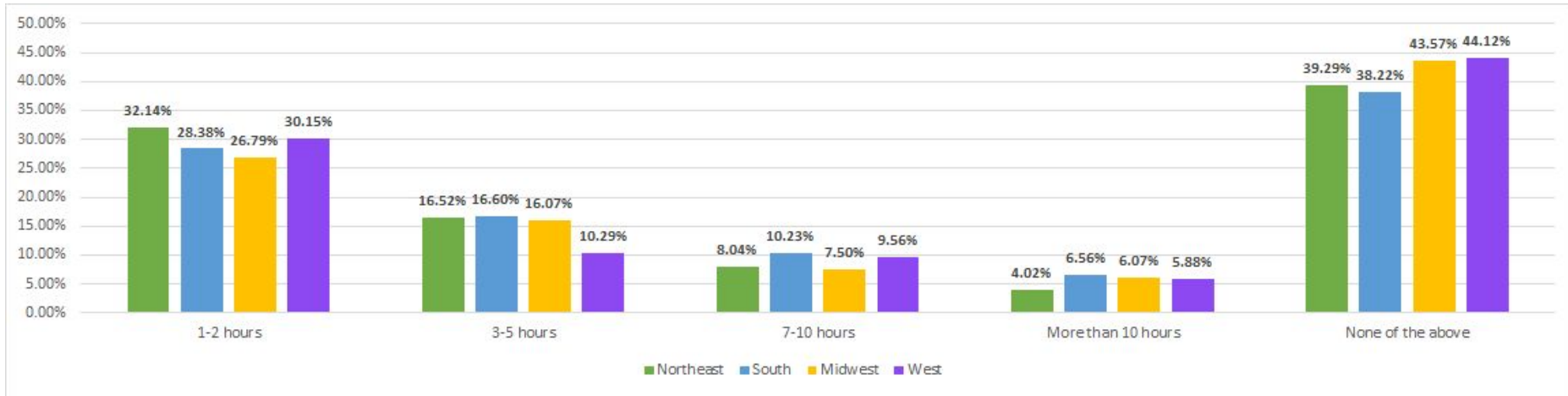
Casual gaming is preferred

- The majority of consumers aren't dedicated mobile gamers, with one in four (29%) only playing one-to-two hours per week, and one in six (16%) playing just three-to-five hours per week.
- In comparison, nearly one in six (15%) play seven hours or more a week.
- Men (32%) are more likely than women (26%) to be hardcore gamers, playing seven hours or more a week.

Millennials are the biggest gamers

- One in three (34%) Millennials play mobile games one-to-two hours a week, and another one in three (36%) play for more than three hours a week.
- Baby Boomers are less inclined, with less than one in four (18%) playing more than three hours a week.

Regional Highlights



The South takes the most game time; the Northeast is less committed

- One in six (17%) in the South play seven or more hours a week, ahead of the West (16%), Midwest (14%) and Northeast (12%).
- Those in the Northeast (32%) are the most likely to just play video games on their smartphone for one-to-two hours per week (W=30%; MW=27%; S=28%).

Question 4

On average, how much time per week do you spend watching online videos (via streaming) on your smartphone?

1-2 hours	34.67%
3-5 hours	22.33%
7-10 hours	12.42%
More than 10 hours	7.83%
None of the above	22.75%

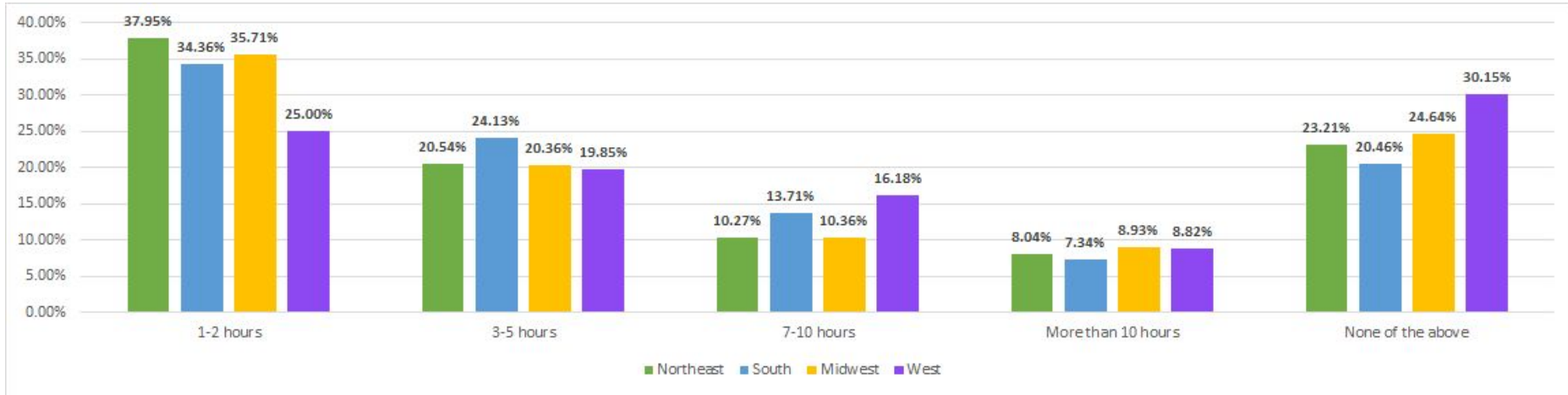
Smartphones are for bingeing

- The majority of consumers (34%) only watch videos on their smartphones for one-to-two hours per week, but one in five (20%) are actually watching seven hours or more.
- Men are big bingers, with roughly one in four (23%) watching seven hours or more a week (compared to 19% of women).

Millennials are divided on mobile streaming

- When it comes to mobile videos, Millennials are evenly divided on how much to watch per week:
 - One in three (34%) only watch for one-to-two hours
 - Just under one in three (30%) watch three-to-five hours
 - Over one in four (28%) watch for seven hours or more
- Baby Boomers don't have the same issue. In fact, less than one in six (14%) watch videos for three hours or more on their phone per week.

Regional Highlights



The West binges on their smartphone; the Northeast limits video time

- One in four (25%) in the West watch seven hours or more per week, while roughly one in five in the South (21%), Midwest (19%) and Northeast (18%) do the same.
- The Northeast overwhelmingly prefers to limit weekly viewing, with almost two in five (38%) only spending one-to-two hours per week watching videos on their smartphone.

Question 5

On average, how much time per week do you spend streaming music or podcasts on your smartphone?

1-2 hours	31.17%
3-5 hours	21.08%
7-10 hours	11.17%
More than 10 hours	8.08%
None of the above	28.50%

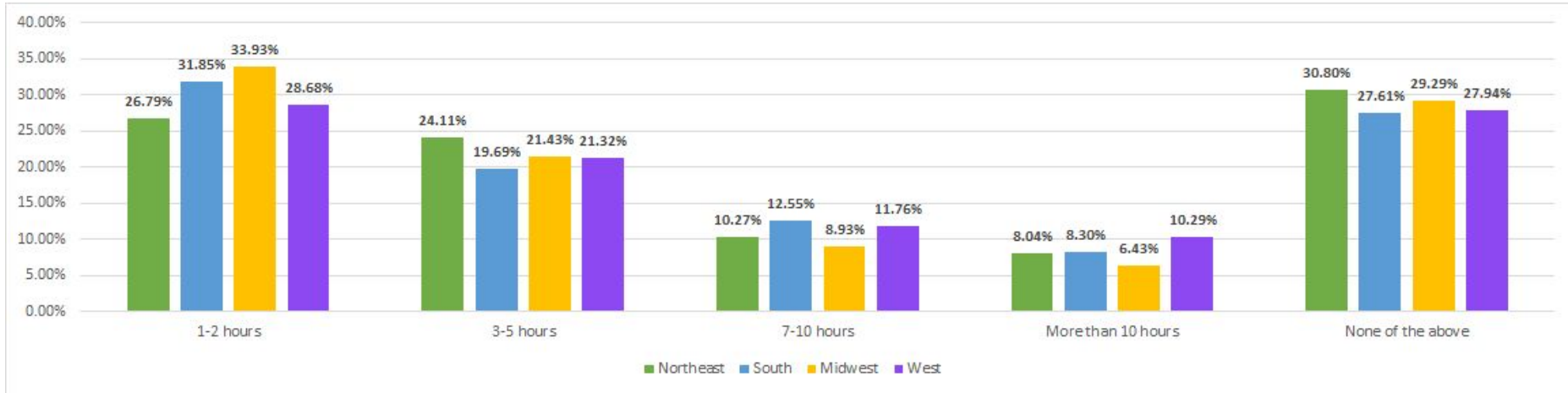
Mobile is the new radio

- Consumers now look to their smartphone to soundtrack their day with one in five (19%) listening to music or podcasts seven hours or more per week.
- Men (21%) are more likely than women (17%) to be tuned in for seven hours or more per week.

Millennials are always tuned in

- Over one in four Millennials (28%) stream music seven hours or more per week, almost six times more than Baby Boomers (5%).
- If Baby Boomers do stream, it's only for a short period of time, with one in five (21%) noting they listen to music or podcasts one-to-two hours per week.

Regional Highlights



The South and West are listening the most

- One in five in the South (21%) and West (22%) listen to seven hours or more per week, which is more than those in the Northeast (18%) and Midwest (15%).

Question 6

How quickly will you purchase the latest device release from a major manufacturer (such as Apple or Samsung)?

I buy new devices as soon as they are released	6.58%
A few months after the release	14.42%
I will wait until I need a new phone / have an upgrade	56.00%
I never purchase the latest device	16.33%
I don't know	6.67%

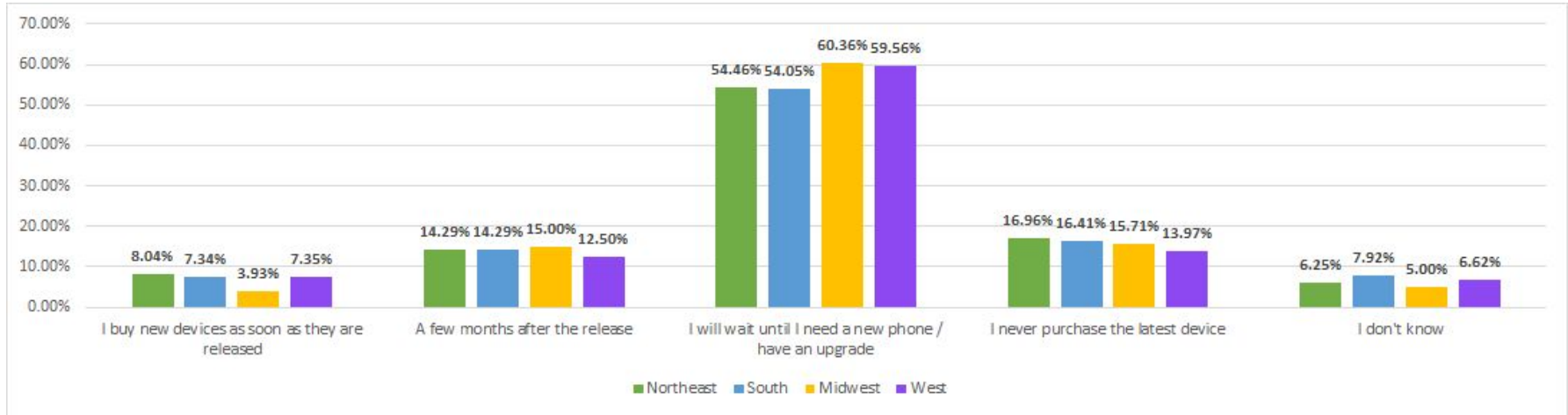
Most people aren't early adopters

- Over half (56%) will wait to purchase a new device until they need a new phone or have an upgrade.
- More women (60%) than men (53%) will wait for their upgrade.

Baby Boomers don't need the latest device

- Over one in four (29%) never purchase the latest mobile device, compared to roughly one in ten (12%) Millennials.
- On the flip side, more Millennials (15%) than Baby Boomers (6%) will purchase a new device a few months after its release.

Regional Highlights



Consumers in the Midwest and West are most likely to wait for an upgrade

- Three in five (60%) across the Midwest and West will wait until they qualify before purchasing a new device, slightly more than in the Northeast (54%) and South (54%).



Mobile Connection

Key Takeaways

Consumers Depend on 24/7 Connections



Consumers are more dependent than ever on mobile networks, with almost two in five (38%) now adding other devices (such as a tablet or e-reader) to their mobile data plan.

Consumers demand a good network connection regardless of where they are, especially during their commute. Almost two in five (39%) find it most frustrating to not have service on public transportation.



Outside of frustration, a mobile “dead-zone” can make consumers feel unsafe. Over half (52%) of women feel unsafe in an area with poor connection, including two out of three (67%) Millennial women.

When it comes to poor mobile connections, almost half (46%) blame their carrier. This impacts consumers’ trust in their carrier to support activities such as the streaming of a live game. In fact, just one in six (16%) will trust their mobile network when watching a live game, while two in five (40%) would prefer to rely on their WiFi connection.

Question 1

Besides a smartphone, do you have other connected devices (iPad, eReader, etc.) on your mobile data plan?

Yes	38.08%
No	59.33%
I don't know	2.58%

Mobile carriers aren't just for smartphones

- Almost two in five (38%) use their mobile data plan for a connected device other than their smartphone.
- Women (40%) are more likely to connect another device to their mobile data plan than men (38%).

Millennials and Baby Boomers are both connecting

- Two in five (39%) Millennials and just over one in three (36%) Baby Boomers connect a device that isn't a smartphone to their mobile plan.
- This was the only survey question where both generations were this close to agreement.

Regional Highlights



The Northeast is expanding its connection horizons

- Over two in five (42%) in the Northeast note they have more than just a smartphone connected to a mobile data plan, slightly ahead of those in the South (39%) (MW=35%; W=35%).

Question 2

Of the options below, where would you find it most frustrating not to have service on your smartphone?

Subway / Public Transportation	38.67%
Office Building	20.08%
Store / Restaurant	18.25%
Concert / Sporting Venue	10.08%
I don't know	12.92%

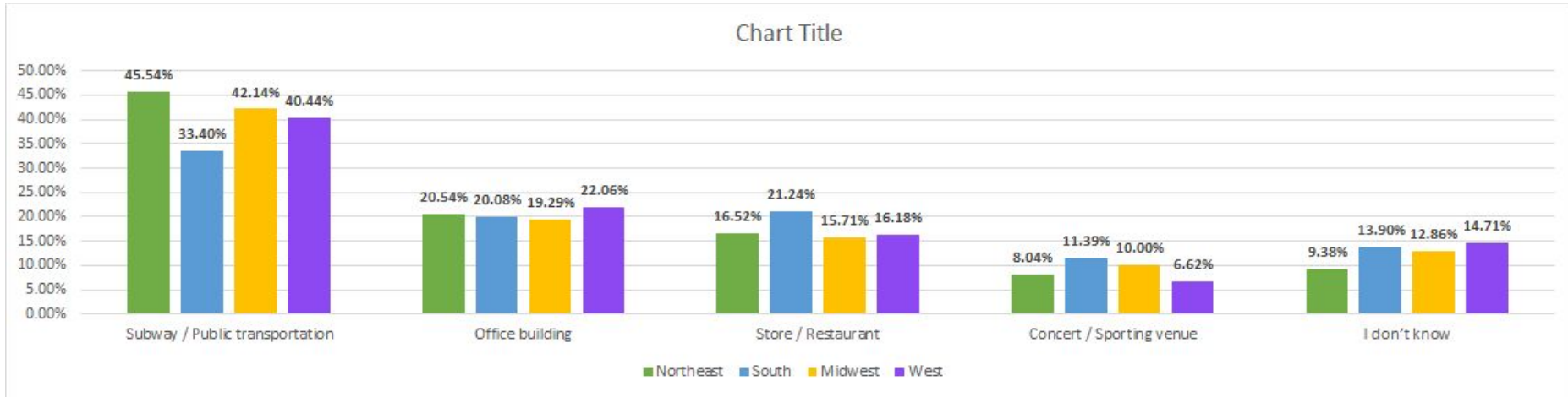
Consumers need service on their commute

- Almost two in five (39%) find it most frustrating to not have service on public transportation.
- Outside of their commute, consumers want service at work. One in five (20%) express frustrations with poor service in their office building.
- Women are more concerned with service while traveling on public transportation (42%) (Men=36%); men are most concerned with a connection in a store or restaurant (20%) (Women=17%).

Millennials want a connection underground

- Over two in five (44%) Millennials find it most frustrating to not have service on the subway, compared to just one in three (34%) Baby Boomers.
- About half (47%) of Millennial women are frustrated if they don't have a good connection on public transportation.

Regional Highlights



Northeasters want a connection on-the-go

- Almost half (46%) are most frustrated when they don't have service on public transportation, while only one in three (33%) in the South agree (MW=42%; W=40%).
- Meanwhile, one in four (21%) in the South are frustrated when they don't have a connection in a store or restaurant.

Question 3

Has being in a mobile “dead-zone” or an area with a poor connection ever made you feel unsafe?

Yes	47.33%
No	46.42%
I don't know	6.25%

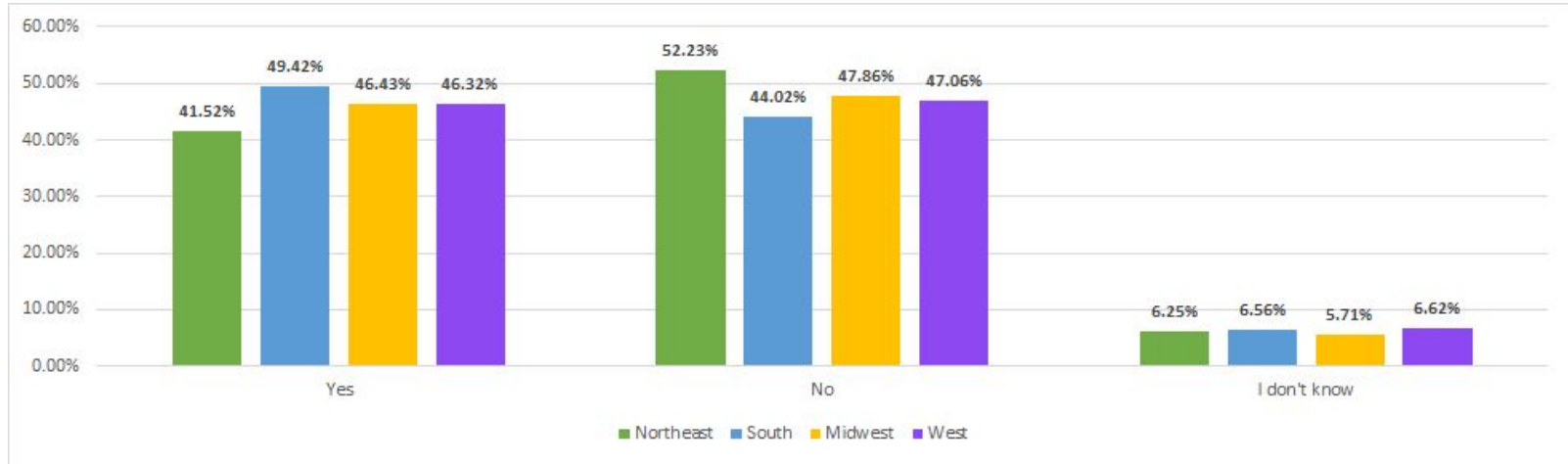
Mobile “dead-zones” make consumers uneasy, especially women

- Almost half (47%) have felt unsafe in an area with a poor connection.
- In fact, women (52%) are more likely to feel unsafe in a mobile “dead-zone” than men (42%).

Millennials see “dead-zones” as a danger zone

- Two in three (60%) note mobile “dead-zones” as unsafe, while less than half of Baby Boomers (27%) agree.
- Millennial women (67%) are the most likely to feel unsafe in a mobile “dead-zone”, especially in comparison to Millennial men (53%).

Regional Highlights



Southerners are concerned about “dead-zones”; Northeasterners are more secure

- About half of those in the South (49%) express concern about feeling unsafe in mobile “dead-zones”, the highest among all regions (NE=42%; MW=46%; W=46%).
- Meanwhile, over half of those in the Northeast (52%) don't have any concerns about safety in mobile “dead-zones.”

Question 4

When you have a poor mobile connection and can't complete a task (such as make a call or send a text), who do you blame?

My smartphone	8.42%
My mobile carrier (such as Verizon, T-Mobile, etc.)	46.58%
My location	40.08%
I don't know	4.92%

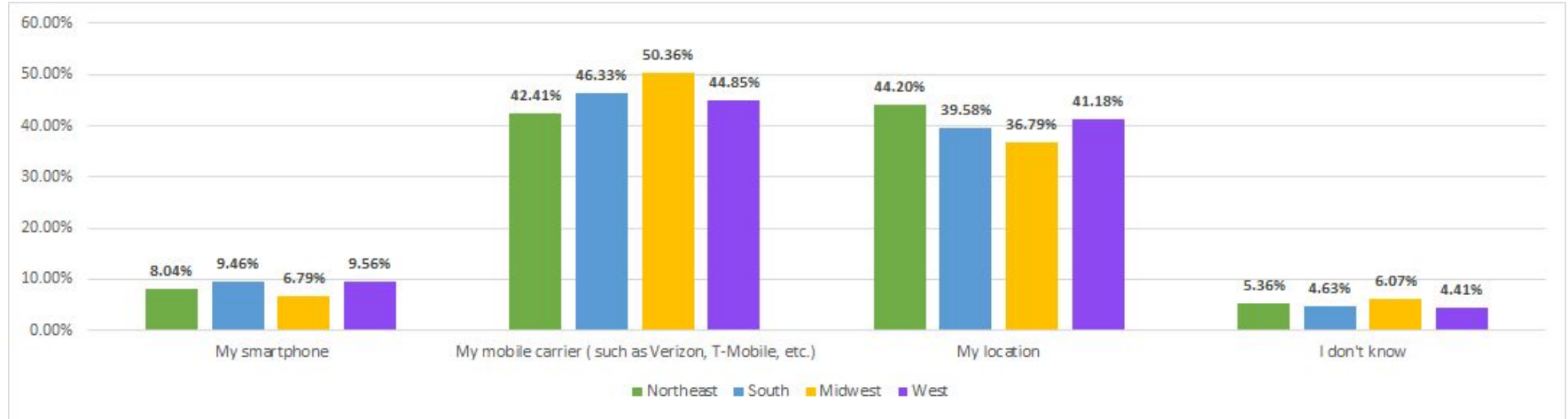
Most consumers assume their carrier is at fault

- Almost half (46%) blame their carrier when they have a poor mobile connection. However, another two in five (40%) blame their location for connection issues.
- Women are more likely to blame their carrier (49%) (Men=44%), than their location for a poor connection (38%) (Men=42%).

Baby Boomers put the blame on their location

- Half of Baby Boomers (50%) blame their location for a connection issue, while just one in three Millennials agree (37%).
- Millennial women are most likely to blame their carrier for a poor connection (54%).

Regional Highlights



Midwesterners are most likely to point the finger at their carrier

- Half (50%) would blame their carrier for a poor mobile connection, more than those in the South (46%), West (45%) and Northeast (42%).

Question 5

When watching live sports on your smartphone, are you more likely to trust your mobile connection or WiFi to not delay/freeze?

Mobile connection (via Verizon, T-Mobile, etc.)	16.08%
WiFi Connection	40.58%
I don't know	6.42%
I don't watch live games	36.92%

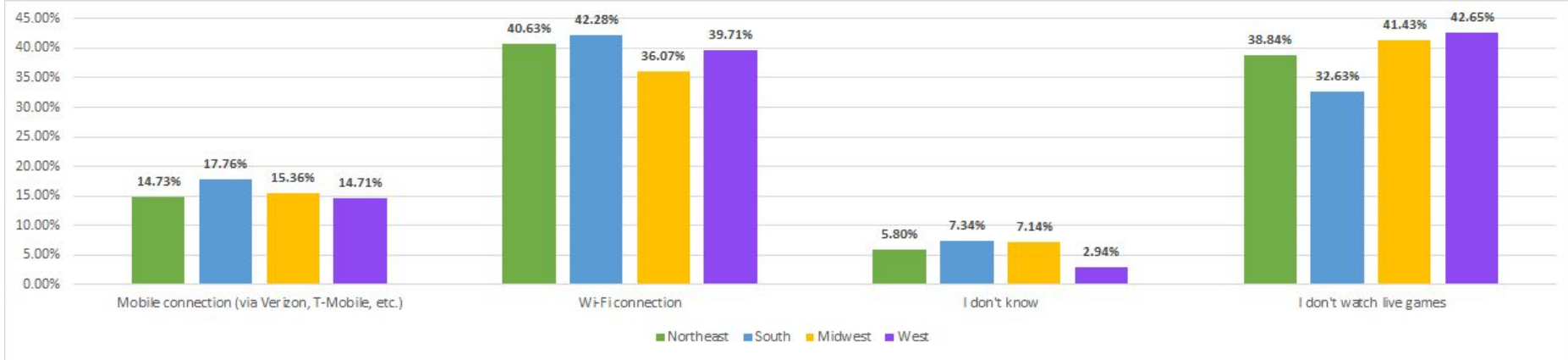
Consumers don't trust their mobile connection

- Just one in six (16%) will trust their mobile device when watching a live game, while two in five (41%) would prefer to rely on their WiFi connection.
- Men (19%) tend to be more trusting of their mobile connection than women (14%).
- Almost half (46%) of women don't watch live games on their smartphone.

Even Millennials look to WiFi for the big game

- Half (50%) are more likely to trust WiFi to stream a live game, while just one in six (16%) Baby Boomers agree.
- Meanwhile, seven in ten Baby Boomers (71%) don't watch live games on their smartphone, compared to one in four (26%) Millennials.

Regional Highlights



The South is most trusting of mobile

- Just over one in six (18%) in the South trust their mobile connection to watch live games higher than the Northeast (15%), Midwest (15%) and West (15%).
- Meanwhile, those in the West are the least likely to watch live games on their smartphone (43%).

Thank You.

For inquiries or executive commentary,
contact rootmetrics@shiftcomm.com

