

The Consumer Speaks

How US Consumers *Really* Feel about the Introduction of a Mobile Driver's License

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- Legislature
- Law Enforcement
- Your own agency
- Other Government agencies (i.e. TSA)
- Businesses/relying parties

CONSUMERS





- Quantitative - survey of 3835 consumers

- Qualitative – focus groups



- Testing

- Interest in mDL
- Use cases
- Optimal pricing
- Likely adopters
- Barriers and opportunities



Overall Findings

80% of respondents interested in an mDL

70% of respondents interested in using their mobile phone to renew their DL/state ID

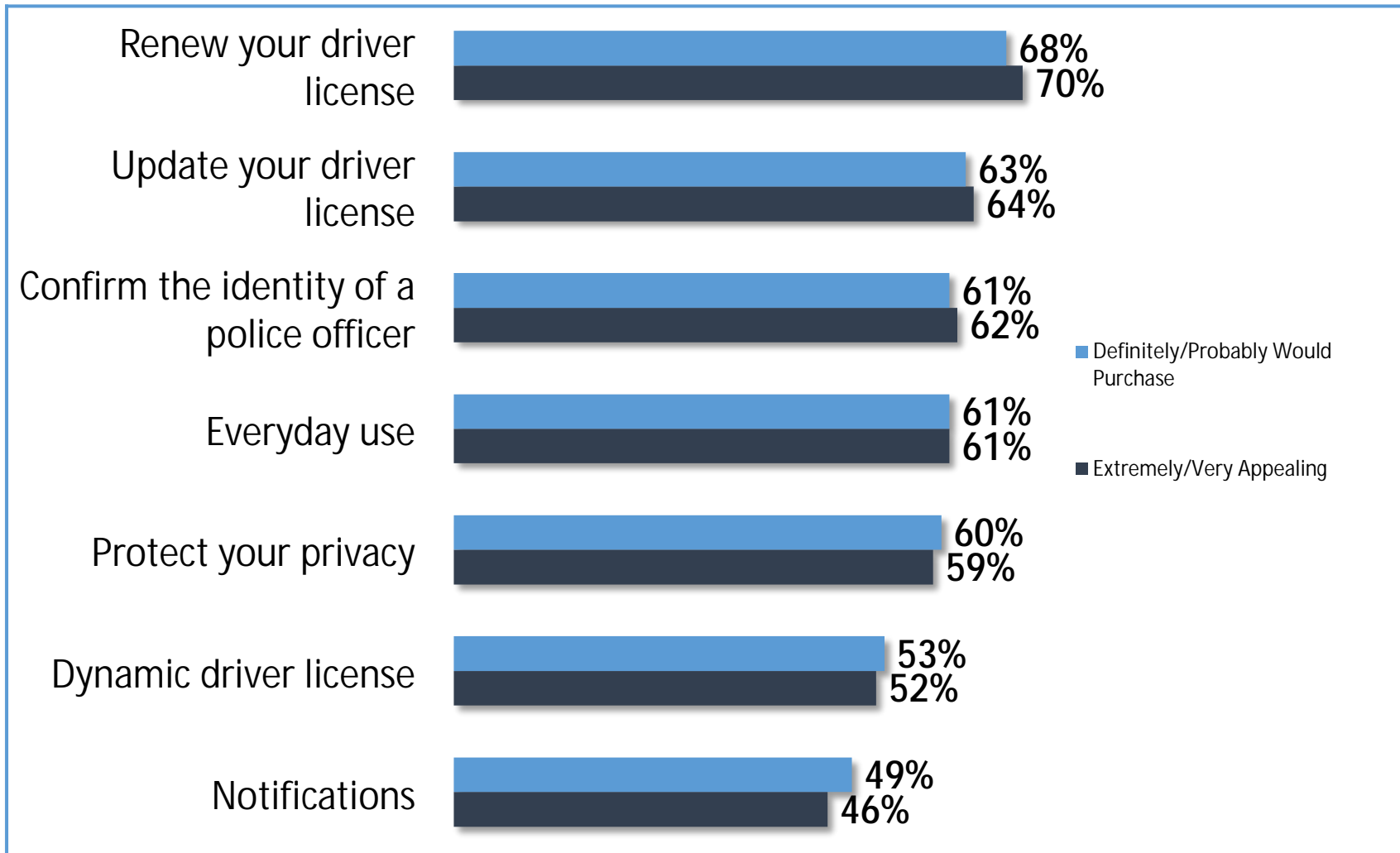
59% of respondents interested in using an mDL for privacy protection

64% of Millennials express the highest concept acceptance and would recommend to a friend

mDL – The Logical Next Step

- mDL is well-received and not a surprise to people
- Reactions to mDL concept were consistently positive –it “seems like the next step.”
- The perceived benefits of mDL are important and relevant:
 - Eliminating fear of a lost driver’s license
 - Reducing/eliminating the need to carry wallet/purse
 - Easing the hassle associated with DL application/renewal/lost license processes
- Most participants feel they would use the mDL anyplace/anytime they use a traditional license

Use Cases: Favorable Appeal and Positive Purchase Interest



Top Tier of Descriptors

Eliminates dealing with the DMV	73%
Accepted everywhere a physical license is	72%
Protects my identity	68%
Allows me to limit how much personal information I share	68%
Is the same as a physical license	67%
One-stop shopping for all my DMV needs	66%

Generational Differences in DL Usage and mDL Reactions

Millennials

- † DL usage: Frequent
- † DL uses:
 - Bars/clubs
 - Alcohol purchases
 - Establishing accounts [banks/utilities/etc.]
 - Check cashing
 - Proof of identity/residence
- † mDL reactions: mDL is logical 'next step' for the smartphone generation

Gen X'ers

- † DL usage: Weekly
- † DL uses:
 - Bars/clubs
 - Alcohol purchases
 - Proof of identity/residence
- † mDL reactions: mDL can make my life easier

Boomers

- † DL usage: Rarely
- † DL uses:
 - Proof of identity/residence
- † mDL reactions: Sees mDL as new and useful

Demographic Differences

- 20 – 39 year olds are most receptive to mDL and more likely to recommend to a friend
- Males have a higher concept acceptance vs females but females are more likely to recommend the mDL
- Consumers in the South, urban dwellers and those interested in technology are most receptive

Security

- Where do I get an mDL?
- How will I get an mDL downloaded to my phone?
- What's the mDL going to cost?
- How long is the mDL valid?
- What if my phone dies?
- What happens if my phone is lost/stolen?
- What will my mDL look like?
- Where can I use my mDL?

For More Information

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