The Consumer Speaks

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

Elizabeth Marshall, Director, Marketing
MorphoTrust USA
Navigating the Stakeholders

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

- 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

- Renew your driver license: 68% (Definitely/Probably Would Purchase) 70% (Extremely/Very Appealing)
- Update your driver license: 63% 64%
- Confirm the identity of a police officer: 61% 62%
- Everyday use: 61% 61%
- Protect your privacy: 60% 59%
- Dynamic driver license: 53% 52%
- Notifications: 49% 46%

Safe Drivers · Safe Vehicles · Secure Identities · Saving Lives
### Top Tier of Descriptors

<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eliminates dealing with the DMV</td>
<td>73%</td>
</tr>
<tr>
<td>Accepted everywhere a physical license is</td>
<td>72%</td>
</tr>
<tr>
<td>Protects my identity</td>
<td>68%</td>
</tr>
<tr>
<td>Allows me to limit how much personal information I share</td>
<td>68%</td>
</tr>
<tr>
<td>Is the same as a physical license</td>
<td>67%</td>
</tr>
<tr>
<td>One-stop shopping for all my DMV needs</td>
<td>66%</td>
</tr>
</tbody>
</table>
# Generational Differences in DL Usage and mDL Reactions

<table>
<thead>
<tr>
<th>Generation</th>
<th>DL Usage</th>
<th>DL Uses</th>
<th>mDL Reactions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Millennials</strong></td>
<td>Frequent</td>
<td>Bars/clubs, Alcohol purchases, Establishing accounts [banks/utilities/etc.], Check cashing, Proof of identity/residence</td>
<td>mDL is logical ‘next step’ for the smartphone generation</td>
</tr>
<tr>
<td><strong>Gen X’ers</strong></td>
<td>Weekly</td>
<td>Bars/clubs, Alcohol purchases, Proof of identity/residence</td>
<td>mDL can make my life easier</td>
</tr>
<tr>
<td><strong>Boomers</strong></td>
<td>Rarely</td>
<td>Proof of identity/residence</td>
<td>Sees mDL as new and useful</td>
</tr>
</tbody>
</table>
• 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

Contact:

Elizabeth Marshall
Director, Marketing
MorphoTrust USA
emarshall@morphotruct.com
978-215-2513