

# The Mobile Consumer 2023

Give and Get **Come Into Focus**

A Global Consumer Survey Report

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# Introduction

Consumers gravitate toward apps that are easy to use, simplify life and save time — and, conversely, they decide whether to keep an app after only a couple of uses.

Those are the key findings in Airship's 2023 mobile consumer survey. Airship has been tracking global trends in mobile apps and sharing what we learned since we powered the first push notifications 14 years ago. This year's survey, fielded with Sapio Research, tracks consumer sentiment, behaviors and expectations. We reached out to 11,000 consumers 18 and older across the U.S., Canada, the U.K., France, Germany, South Africa, Singapore, Thailand, Indonesia and Brazil.

In this report, you'll find further insights on:

- **Why consumers continue to turn to apps**
- **How consumers discover apps**
- **What leads consumers to delete apps**
- **What personal information consumers are willing to share with brands**
- **How consumers use smartphones while shopping in-store**
- **What drives people to opt in to mobile app push notifications and how often they want to receive them**
- **How consumers use apps to improve their lives**
- **Who adopts new mobile app experiences, such as Apple's Focus and Live Activities, and why**

# Consumers Turn to Apps to Simplify Their Lives

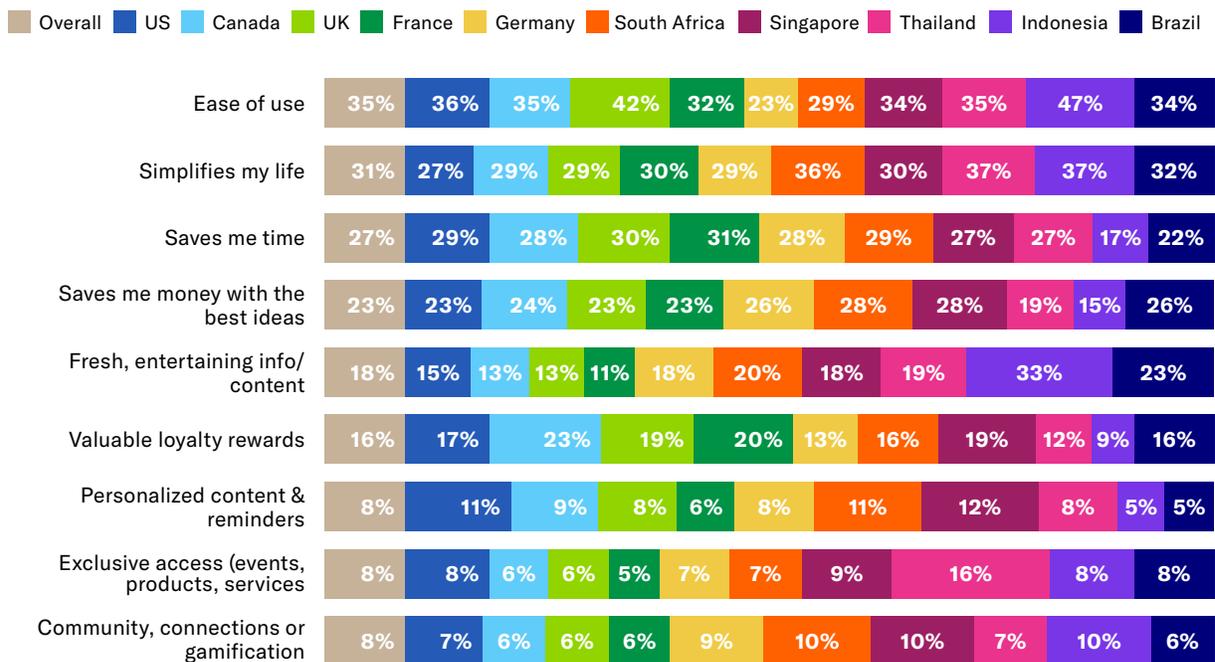
Consumers are downloading more apps than ever, but the leading reasons for ongoing use might surprise brands given the current global economic landscape. While brands may expect that consumers are most likely turning to apps for deals or loyalty rewards, higher-level benefits are what keep customers coming back.

What are those benefits? Ease and convenience. Consumers continue to use apps most for “ease of use” (35%) and “simplifies my life” (31%). This preference for convenience and efficiency far outpaces other reasons for ongoing app use. Unsurprisingly, “saves me time” (27%) rounds out the top three reasons across 11,000 global respondents.

It really is (almost) all about convenience.

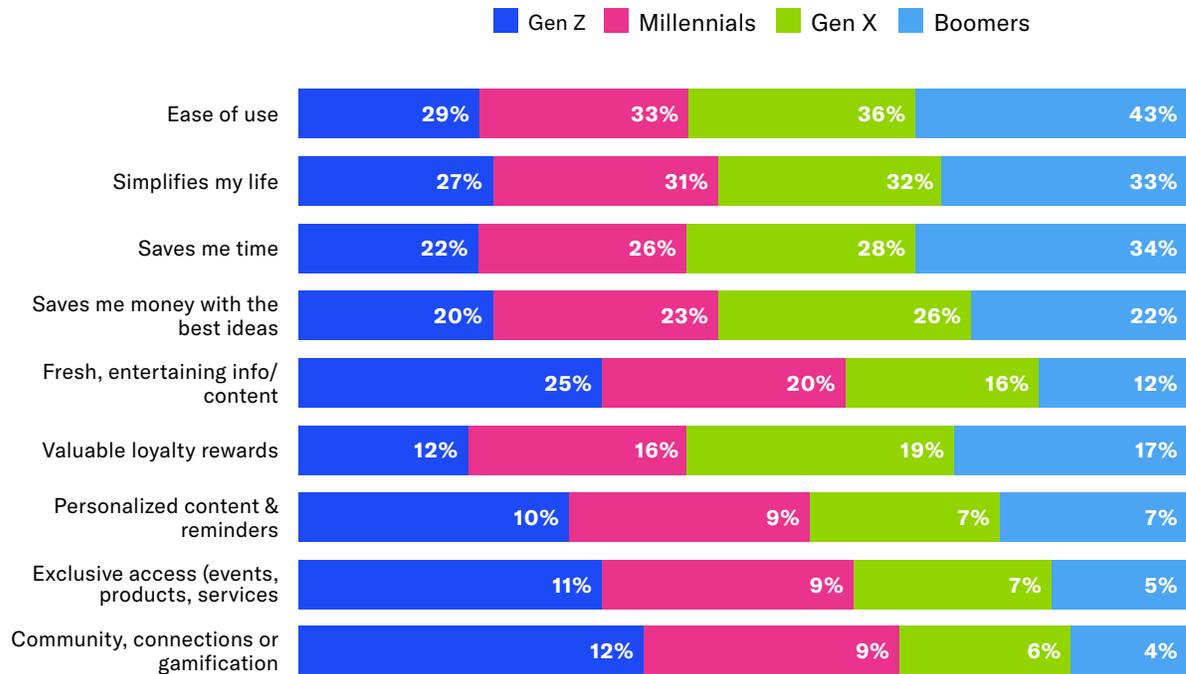
But we are in a shaky economy after all, so while convenience and simplicity reign supreme, “saves me money with the best deals” landed as the fourth largest reason for using apps (23%). Deals, rewards and targeted offers also saw the biggest growth year-over-year as reasons to opt in to notifications from mobile apps, as we’ll explore later.

## Why Consumers Continue to Use Apps from Their Favorite Brands



It doesn't matter where household income falls — convenience is king. It's important to point out, however, that "simplifies my life" overtook "ease of use" for high-income households.

### For Boomers, Ease of Use Motivates Ongoing App Use Most



Convenience and efficiency were consistent across generations as well. "Ease of use" ranked as the top factor across all age groups, with a notably high percentage of boomers (43%) citing it as the top factor. The second highest factor for boomers was "saves me time;" for other generations it was "simplifies my life."

However, the point remains the same.

That doesn't mean there wasn't any variance between age groups. Gen Z respondents were particularly interested in apps that captivate and encourage connectivity. Adding to that, two to three times as many Gen Z respondents versus boomers cited "fresh, entertaining information and content"; "exclusive access (events, products, services)"; and "community, connections or gamification" as their reasons for continuing app use.

### Recommendation:

Convenience is indeed king. Consumers across all age groups agree that the main reason they continue using an app is that it's easy to use. From onboarding customers to getting them to come back for more, it's crucial to build an app experience that's intuitive and easy to navigate, while delivering value. The app experience should make an otherwise time-consuming and laborious task be as simple as clicking a button — and feel intuitive and effortless too.

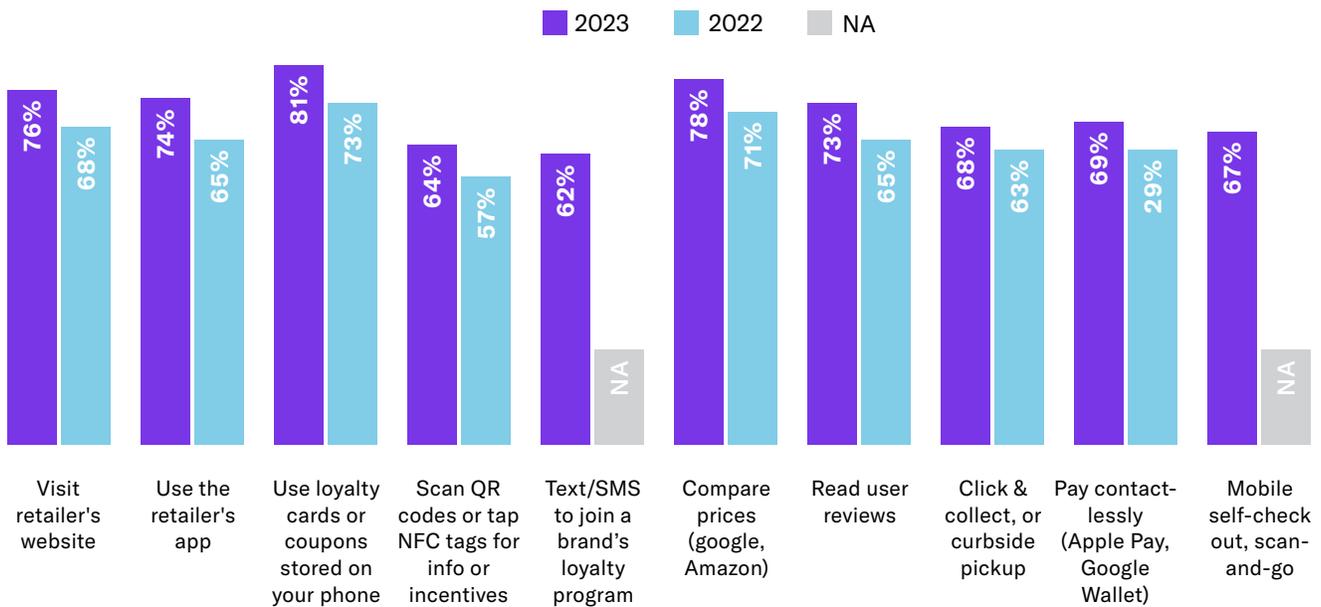
# Apps Span Digital to Physical Experiences

The retail industry isn't just a hot-spot for app innovation: it's also a proving ground for streamlining digital and physical customer experiences. People are always somewhere — at home, nearby or far away. If a brand can reach and guide customers wherever they are, it can do anything.

Retail is often the go-to example of “phygital” experience, but every industry in our survey has the potential to meld digital and physical experiences and be rewarded for doing so.

For retail, the challenge of the phygital experience is not the store, but the app. When asked about 10 different in-store smartphone activities, “use the retailer’s app” grew the most year-over-year. A staggering number of global respondents — 74% — said they are likely to “use the retailer’s app” when shopping at its physical storefronts today.

**Across 10 In-Store Smartphone Activities, Using Retailers' Apps Saw the Most Growth**

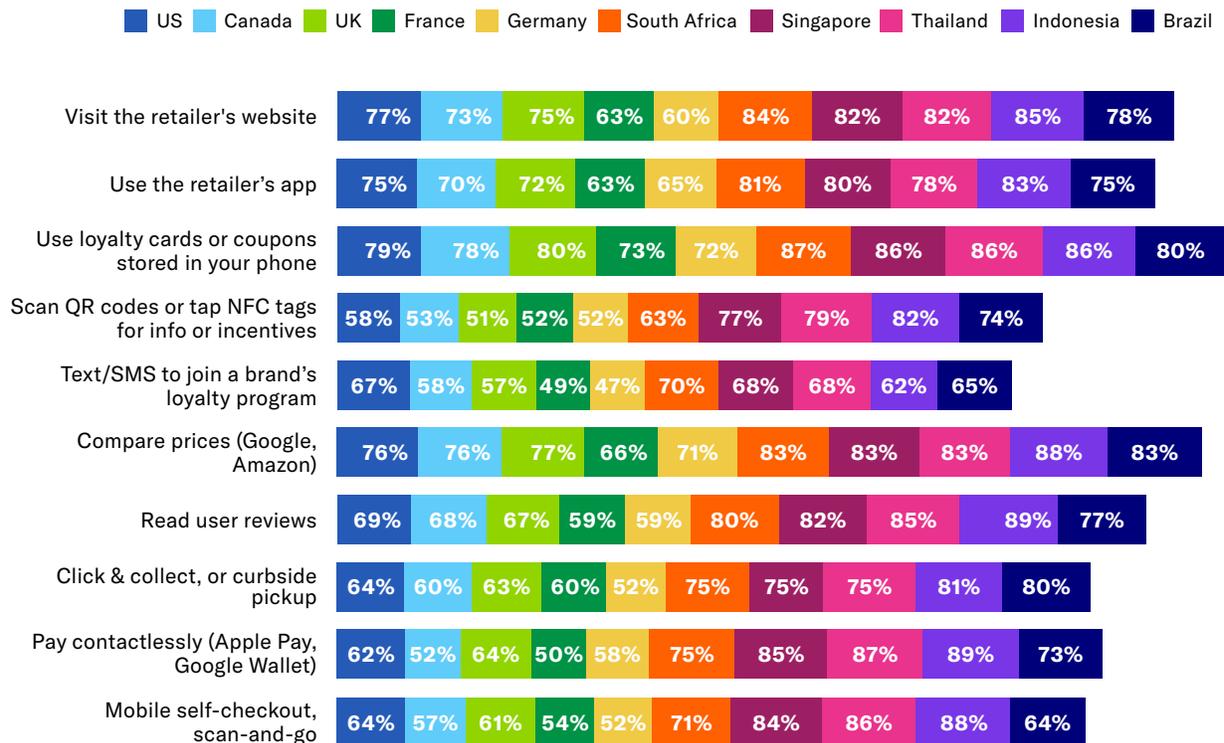


A staggering number of global respondents — 74% — said they are likely to “use the retailer’s app” when shopping at its physical storefronts today.

For most countries and generations, the likelihood of “using a retailer’s app” while shopping in-store is only a few percentage points behind “visiting the retailer’s website,” despite first having to download apps from the App Store or Google Play. This only goes to show the increasing importance of mobile app experiences in bridging digital and physical experiences.

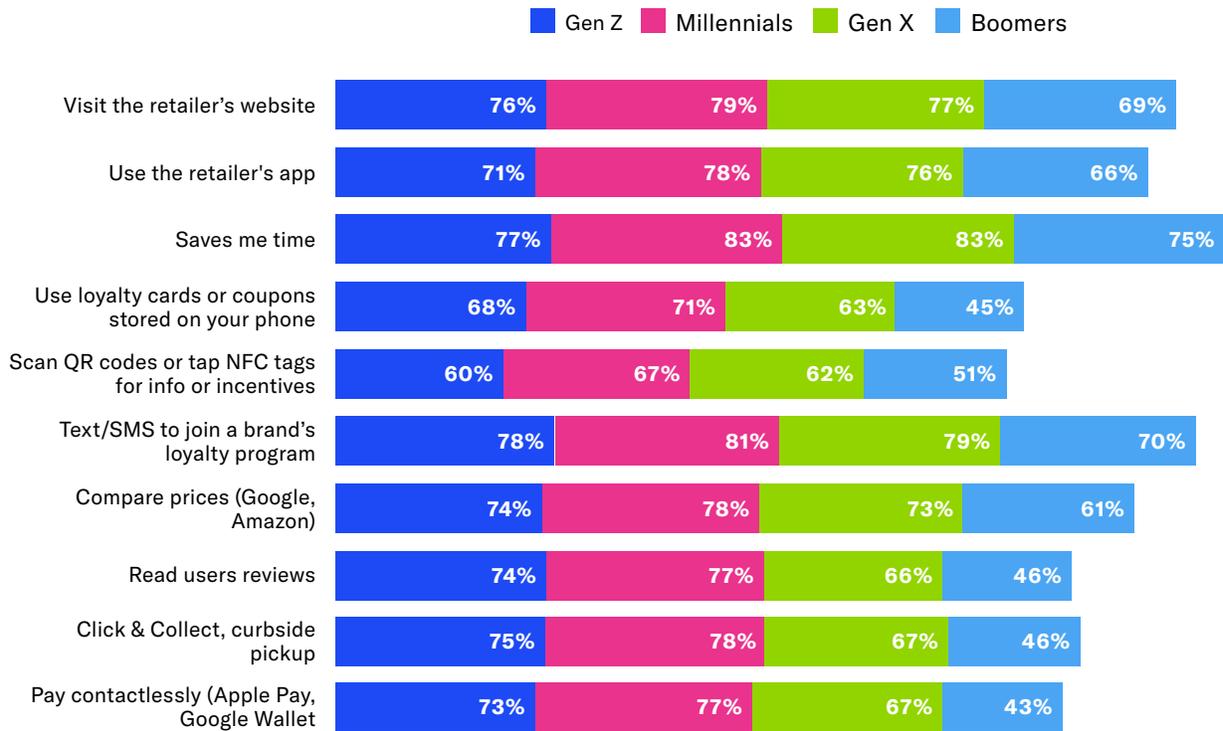
Data also shows that large numbers of global consumers are using their smartphones to do things like “use loyalty cards,” “compare prices” and “read user reviews.” In fact, high-income households lead in use of all smartphone activities while shopping in-store. Brands should seek to incorporate new features into their apps (or streamline existing ones) that enable consumers to perform these activities.

### Most Consumers Will Use Retailer’s Apps to Meld Digital and Physical Shopping Experiences



Like last year, millennials led generations in the likelihood of carrying out all in-store smartphone activities, while (perhaps without surprise) boomers are the least likely. Gen X are nearly as likely as millennials to “use the retailer’s app” while shopping in-store (76% compared to 78%), while 71% of Gen Z and 66% of boomers are also likely to do so. Retailers have a significant opportunity to streamline CX, increase order value and grow loyalty membership — if they can get more of their oldest and youngest consumers to use their apps.

**Across Generations, Millennials Lead in Performing All In-Store Smartphone Activities**



**Recommendation:**

Mobile apps are blurring the lines between physical and digital spaces especially in retail, with more than three-quarters of millennials and Gen X customers engaging with the brand’s app during an in-store visit. The app presents an opportunity to identify in-store customers and seamlessly deliver wayfinding for shopping lists, coupons, loyalty point rewards, user reviews and deep product information. Easy-to-use app features offer an experience that encourages positive buying behavior and influences purchase decisions, streamlining the entire process, from purchase to pick up and even returns.

# App Opt-Ins Are Driven By Value

Given that consumers are using apps to simplify their lives and augment physical retail experiences, how can apps position themselves as providers on these two fronts in the most prominent way possible?

On smartphone lockscreens.

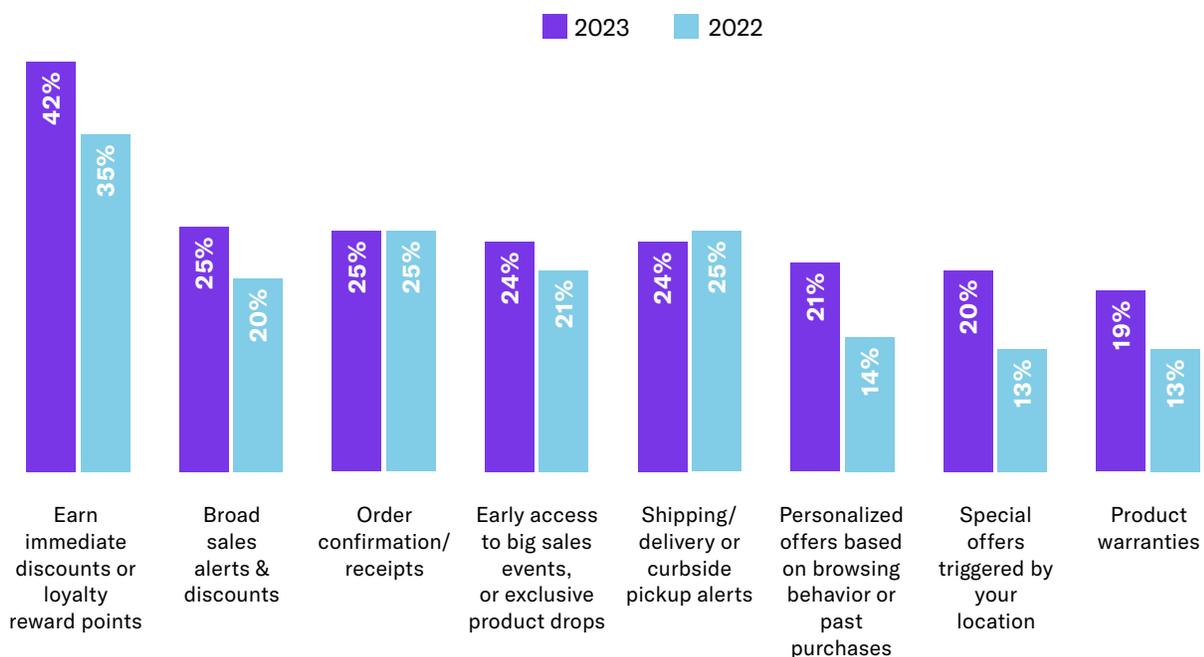
Landing those lockscreen notifications gives apps an inherent advantage — reaching people wherever they are, at the exact moment (and location) it matters most, and on the most visible real estate on the planet.

Getting consumers to consent to receive push notifications, then, is a top priority.

Our survey found that consumers opt in to notifications when they know they'll get discounts and personalized offers in return. "Discounts and loyalty rewards" (42%), "offers personalized to browsing behaviors or past purchases" (21%) and "special offers triggered by current location" (20%) saw the largest gains as reasons to opt in, each gaining 7% between 2022 and 2023. These gains in deal-motivated behaviors aren't surprising, given recent inflation.

What does this mean for retailers? With consumers eager for deals and willing to give up more data and personal information to get them, retailers have more opportunities than ever to better understand customers and reach them when it matters most. Those who deliver more value, more deals and more convenience are best poised for success.

**Discounts, Loyalty Rewards and Triggered Offers Gain as Top Reasons Consumers Opt In to Brand Communications on Smartphones**

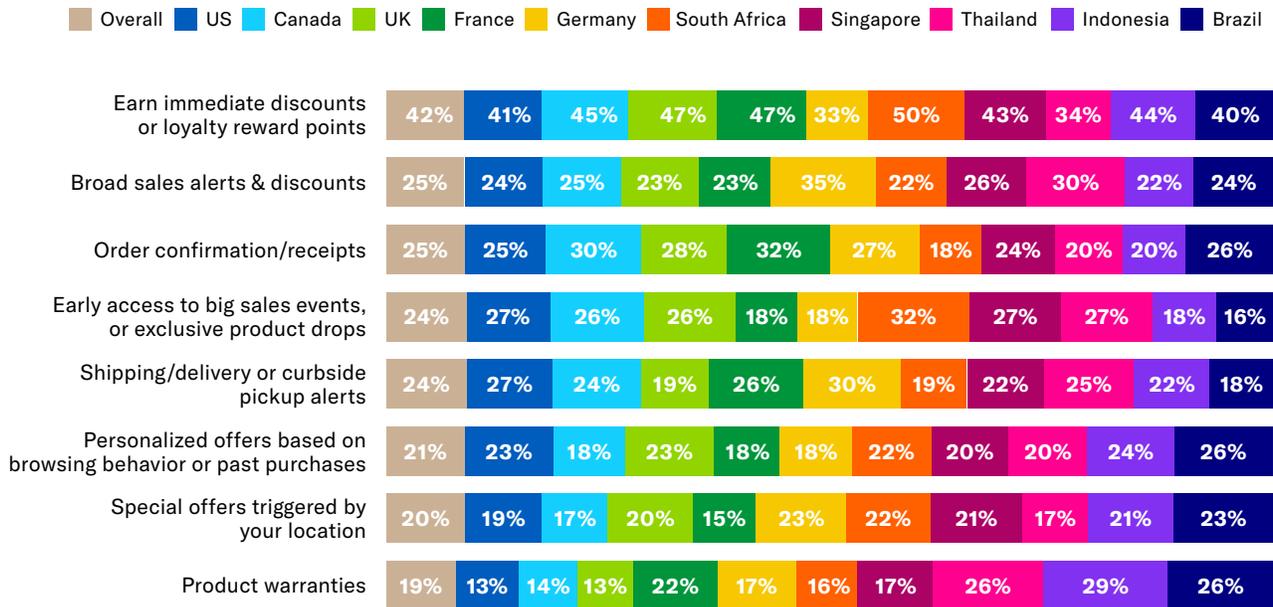


“Earning immediate discounts or loyalty points” was far and away the dominant reason for opting in to notifications across household income levels, generations and countries. The one exception was Germany, where “broad sales alerts & discounts” edged out “earn immediate discounts or loyalty reward points” for the top spot.

Tied in second place globally as top incentives to opt in were “broad sales alerts & discounts” and “order confirmations or receipts” at 25% each. The third most popular reason for opting in was also a tie – 24% of respondents cited “early access to big sales events, or exclusive product drops” and “shipping/delivery or curbside pickup alerts.”

The writing is on the wall: app customers willing to give brands lockscreen access expect special treatment, white-glove services and especially discounts and rewards.

### Top Reasons for Opting In to Brand Communications on Smartphones Globally



### Recommendation:

Providing the right type of value to customers is critical to getting their opt in to push notifications. When a brand provides immediate discounts and reward points in exchange for an opportunity to send communications to customers’ mobile devices, opt-in rates improve significantly. Customer data should be leveraged to ensure the highest level of personalization, while communicating offers, discounts and rewards.

# Most People Find Apps in App Stores

“Searching and browsing the app stores” continues to be the top way people discover new apps to download, our survey found. This holds true across household income levels, generations and the majority of countries.

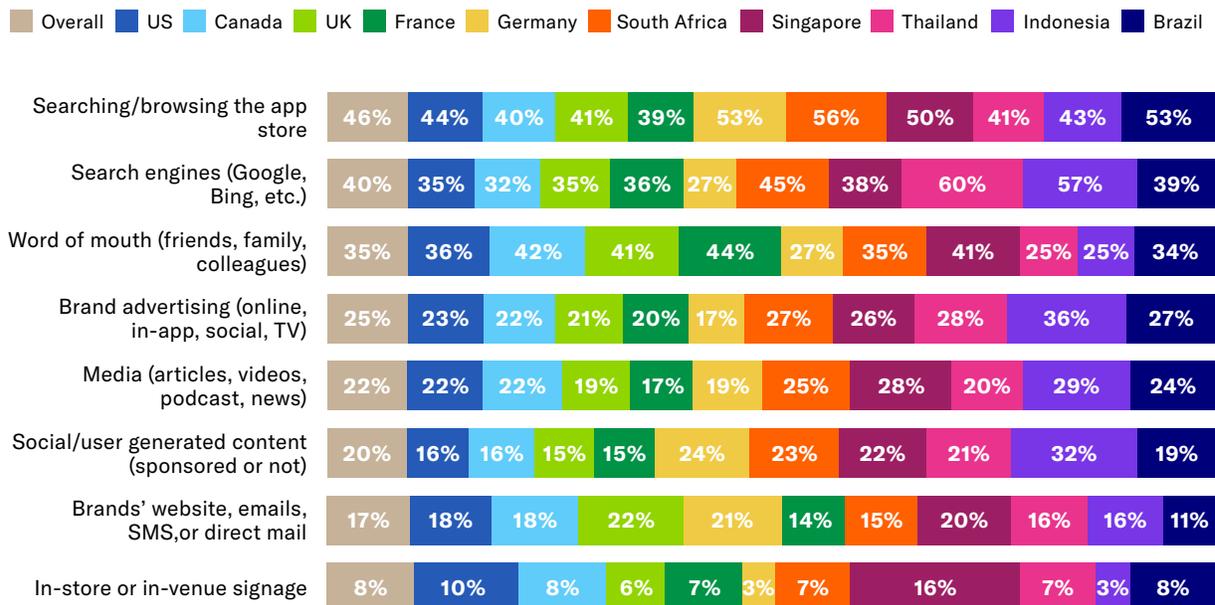
“Search engines” are the second most common app discovery method. This makes sense, considering how many of us are scrolling and searching across our phones when we have moments to spare. It’s the perfect time to find new apps and try them out.

However, traditional ways of finding new products and services extend to apps as well. As important as digital levers are, we found that the third most important driver for app downloads was “word of mouth” (WOM).

WOM is especially powerful when it comes to app downloads in the U.K., France and Canada, where consumers turn to WOM as much as or more so than the app stores. In the U.S., Germany and Singapore, WOM is the second most common method of finding apps.

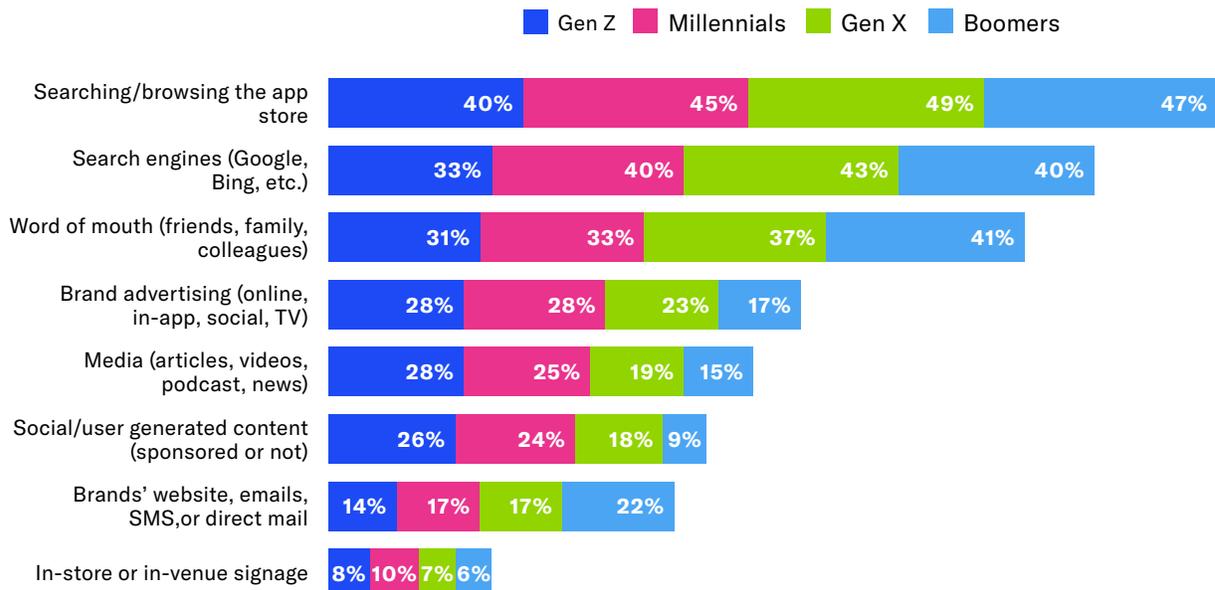
What does this mean for brands and developers? Prioritize brand building. Optimize experiences. Generate excitement around your brand and your app. Gamify referrals. These are critical to ensuring WOM drives global app downloads for your brand.

## In the Majority of Countries, Searching & Browsing the App Stores is the #1 Way People Find Apps to Download



While there's no set formula for success here, there are some best practices that can and should set your app apart: optimize your app store listing to improve both visibility and conversion rates; encourage positive reviews and respond to and address negative ones; leverage search strategies for Google and other popular search engines and social platforms; and craft brand experiences that generate buzz around your app and your brand to drive consumer awareness and referrals/recommendations.

### Across Generations, Most Consumers Use App Stores to Find Apps to Download



When devising strategies to generate WOM and increase the likelihood your app is found in app store searches and through traditional search, you may want to narrow them down further to address the needs of different age groups.

Perhaps without surprise, older generations (particularly boomers) were much less likely to find apps through “brand advertising,” “media” and “social/user generated content.” However, boomers do find apps through “brands’ websites, emails, SMS or direct email” more often than their younger counterparts. Brands need to find ways to make pitches for their apps on channels most compelling to older consumers.

### Recommendation:

App stores are still the most popular destinations for customers across all age groups to find and download apps. Naturally, app store search plays a huge role, and it's different from SEO. App Store Optimization (ASO) will help you with discoverability, so more customers find and download your app. A few tactics that will help you achieve a higher app store ranking are testing compelling names, images and descriptions; experimenting with keywords and rich media for visibility and conversion; and gaining positive reviews. Leverage app store analytics regularly to optimize your ASO strategy and maintain a high ranking.

# Delight Immediately or Face Deletion

While the themes of value and convenience have dominated consumer app downloads, the top reasons for deleting apps may come as a surprise. They're much more mundane than the previous data would suggest.

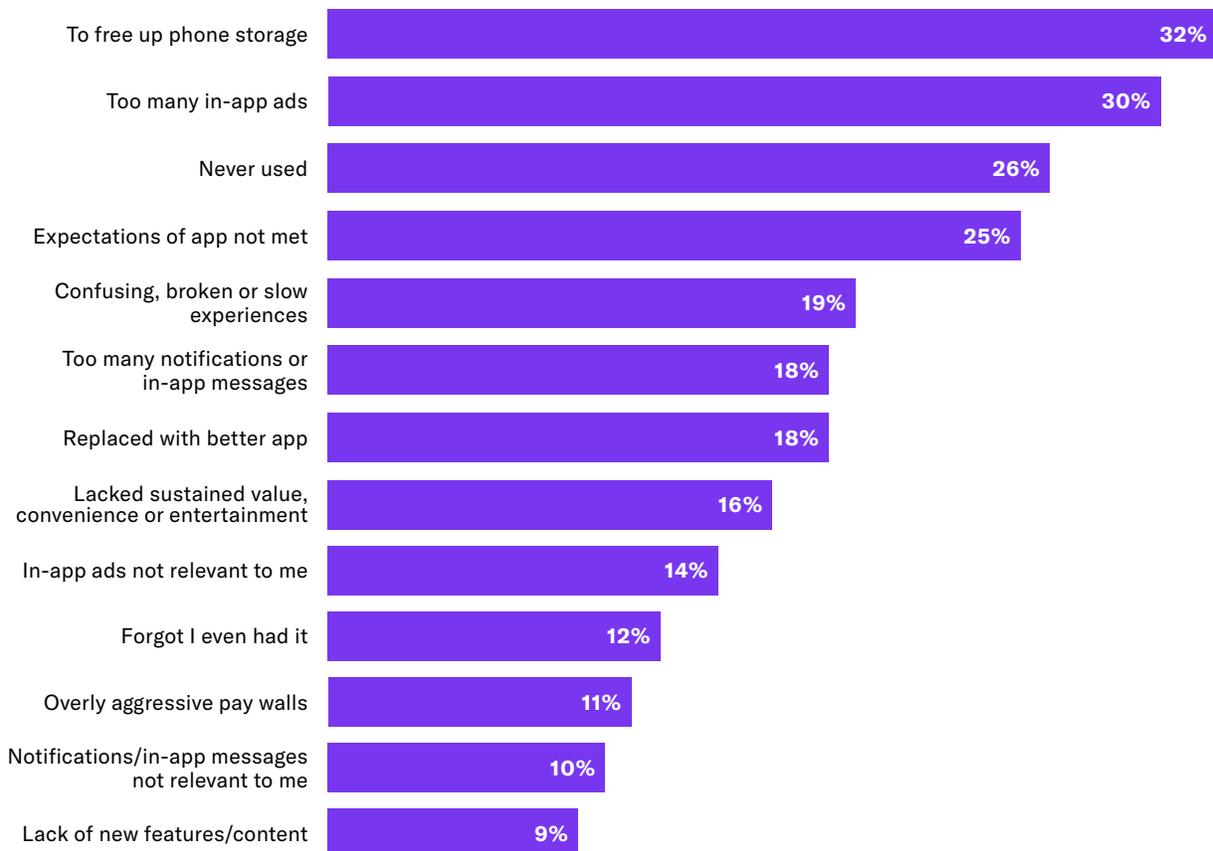
When consumers were asked why they delete apps, practical responses rose to the top, such as “freeing up phone storage” (32%) and “too many in-app ads” (30%).

Interestingly, “too many in-app ads” and “too many notifications or in-app messages” were cited nearly twice as much or more as reasons for deleting apps than “in-app ads not relevant to me” and “notifications/in-app messages not relevant to me.”

That's where the theme of value comes back into play. Notifications and in-app messages must add value to customers to be appreciated. Targeting, personalization and automation improve relevancy and click throughs, but overzealous sending turns value into annoyance.

Alarming, “never used” (26%) was the third most common reason for deleting apps globally. In Canada, France and Germany, “never used” was the most common reason for app removal, and in the U.S., U.K. and Singapore, it ranked second.

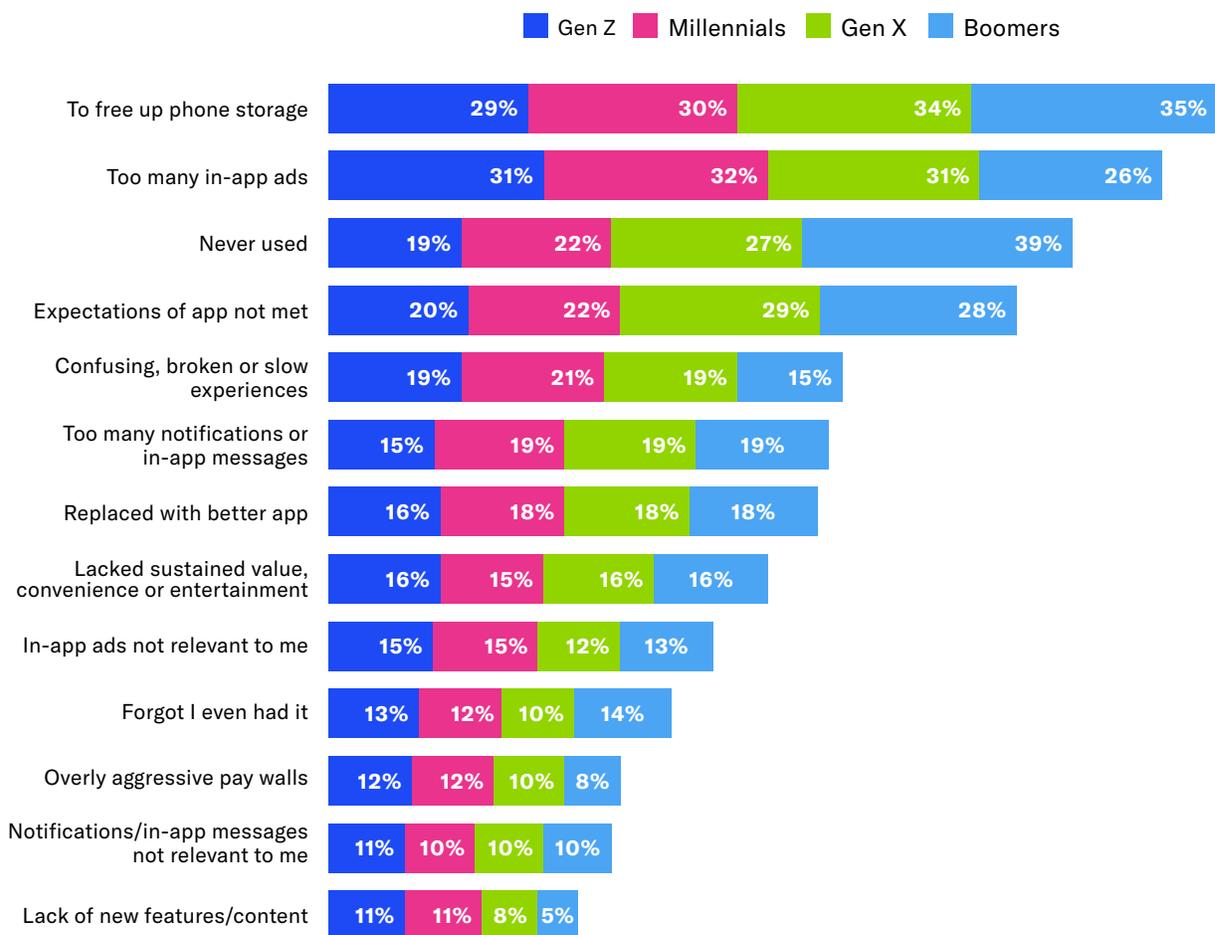
## What Most Often Causes Consumers to Delete an App?



This data suggests that brands must quickly and clearly convey the value of the app to customers. Improving mobile app onboarding experiences is crucial to fostering app usage and optimizing retention, as well as driving referrals/recommendations and general word of mouth. But brand experiences outside of the app also prove critical for app use and keeping the app on consumers' phones.

When it comes to preventing deletion, brands face the steepest challenges with older consumers. “Free up phone storage,” “too many in-app ads” and “never used” held as the top three reasons consumers deleted apps across all age groups. However, older generations were much more likely to delete apps because they were “never used” and “expectations of app not met,” with a whopping 39% of boomers citing the former reason.

### Older Generations Are More Likely to Cite Never Using an App or Expectations Not Being Met as Reasons for Deletion Than Younger Generations



### Recommendation:

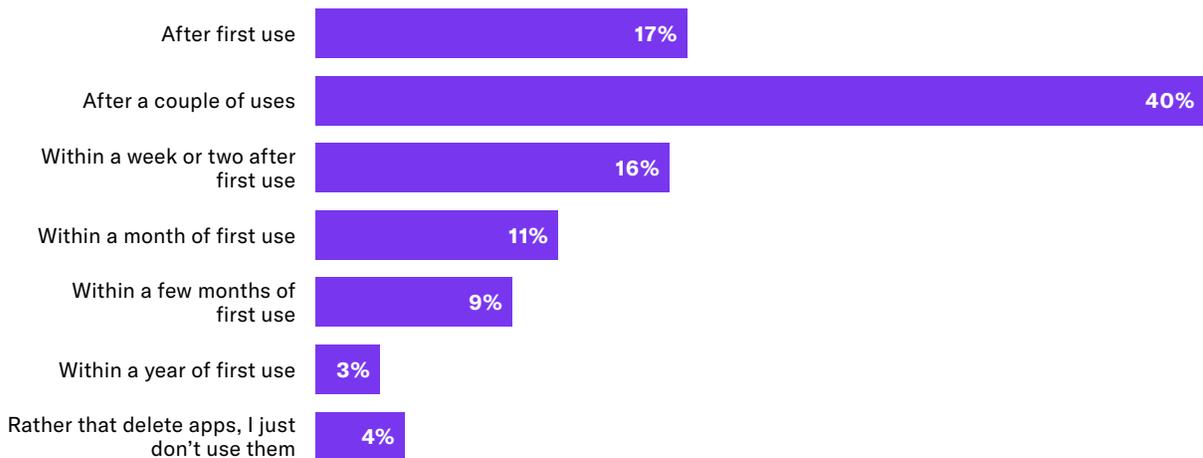
With just moments to captivate your customers after they download your app, it's essential to onboard your customers effectively, identify preferences and drive opt-ins to help improve their experience without overwhelming at first click. Leverage testing and experimentation to achieve an optimal onboarding flow and tailor experiences for every individual across the app lifecycle. Find out how frequently customers want to hear from you and for what reasons (promotion, education, rewards, inspiration, etc.). Progressively grow customer understanding over time with first- and zero-party data from surveys and observed behaviors. Then focus on delivering maximum value — inside and outside the app™.

# First and Second Impressions Are Everything

Most consumers (57%) use an app once or twice before deciding whether to delete it. Nearly three-quarters of consumers (73%) decide if they'll delete an app "within a week or two after first use." Importantly, brands need to recognize the limited window they have to make a compelling case for their app's value proposition.

With only a limited number of opportunities to make a lasting impression — and an even narrower timeframe for those opportunities to convert — brands need to act quickly to persuade potential consumers. Even before the download, via app descriptions on app stores and messaging promoting app downloads, brands need to clearly and quickly communicate how they'll improve a customer's life. Then they need to deliver on the promise just as quickly. Otherwise, consumers will swiftly move on.

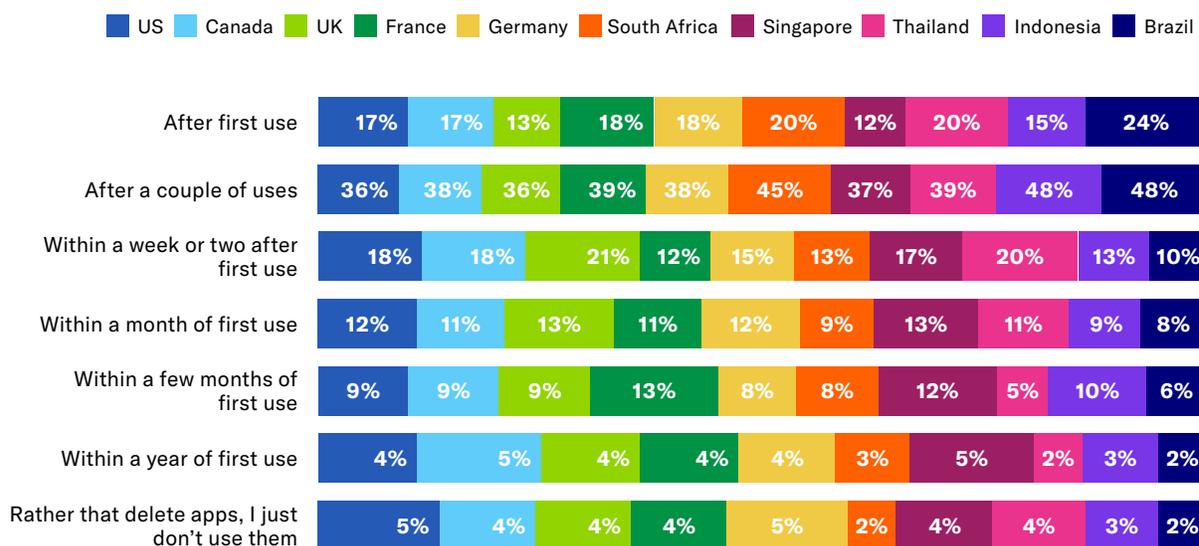
## Most Consumers Use Apps a Couple of Times Before Deciding Whether to Delete Them



Most consumers (57%) use an app once or twice before deciding whether to delete it. Nearly three-quarters of consumers (73%) decide if they'll delete an app "within a week or two after first use."

This pattern of deciding whether to delete an app after one or two uses was the most pronounced among consumers in Brazil (72%), South Africa (65%) and Indonesia (63%). For the rest of the countries we surveyed, over half of consumers give apps just one or two chances before considering deletion. The only two exceptions are the U.K. and Singapore, where only 49% of consumers act as swiftly.

### Across Countries, the Pattern Holds: Most Consumers Give Apps a Couple Uses Before Deciding Whether to Delete Them



While consumer behavior in each country we surveyed generally matched the larger trend, there are some key differences in the generational picture. Younger consumers are more likely to delete an app after first use than their older counterparts (19% of Gen Z and 20% of millennials versus 16% of Gen X and 12% of boomers).

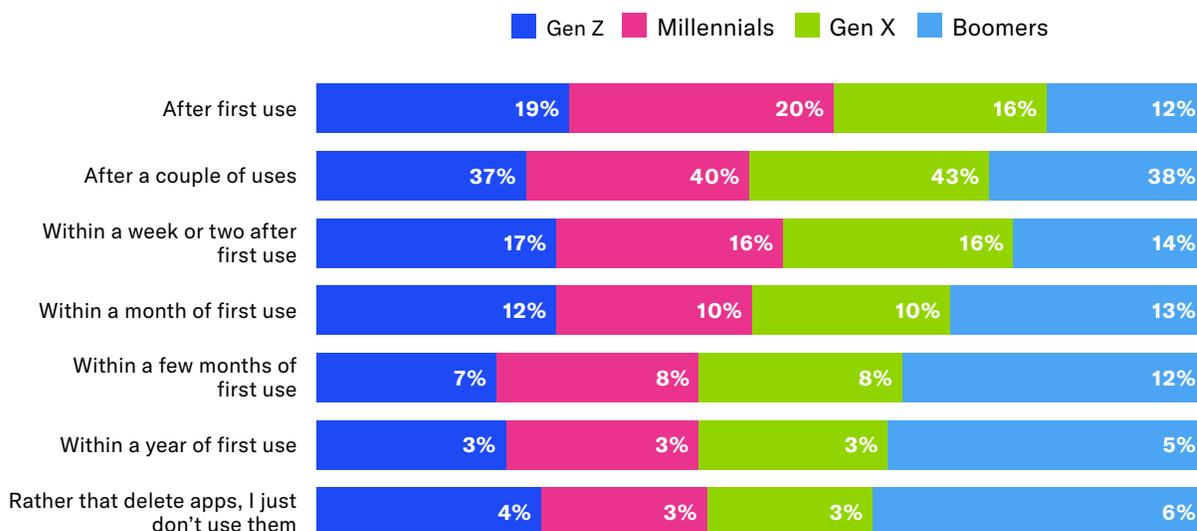
The majority of consumers from each age group reported deciding whether to delete “after a couple of uses” or less, with millennials being the generation most likely to do so (60%), followed closely by Gen X (59%).

Interestingly, more boomers than other generations were likely to decide to delete an app “within a month of first use” (13%), “within a few months of first use” (12%), “within a year of first use” (5%) or “rather than delete apps, I just don’t use them” (6%).

What can you do with this information? Depending on your target consumer, it may mean you should assume you’ve got one or maybe two chances to not only avoid a negative impression and wasted acquisition spend, but to truly wow and delight customers.

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**Millennials and Gen Z Are More Likely to Delete an App After First Use Than Boomers**



**Recommendation:**

Leverage insights from other channels and points of interaction to tailor experiences when you welcome new, identified app customers. Optimize their onboarding experience leveraging Scenes, Surveys and Stories that you can continuously refine to quickly and effectively convey the app’s value proposition and get them hooked. Deliver in-app value through personalized messaging and app experiences — and ensure you leverage customer data to tailor communication to their preferred channels. Overall, focus on creating memorable and engaging experiences that customers would love to return to again and again.

# People Want Personalization That’s Useful, Not Creepy

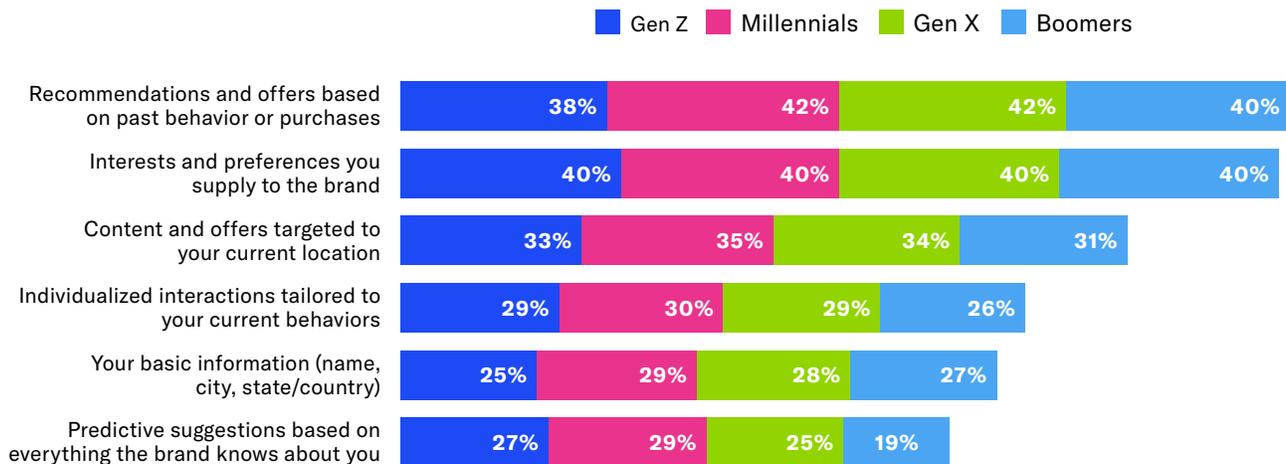
The app experiences that consumers are most satisfied with are the ones that make their lives easier and are tailored to their interests and preferences. Global consumers are looking for personalized app experiences — but personalized with an asterisk. There’s a fine line for consumers between personalized experiences and invasive ones.

The consumers we surveyed find the most useful types of personalization from brands to be “recommendations and offers based on past behavior or purchases” (41%), “interests and preferences supplied to the brand” (40%) and “content and offers targeted to your current location” (34%).

With very few exceptions, “predictive suggestions based on everything the brand knows about you” was ranked the least useful personalization method across all countries, age groups and income levels. The outliers? Gen Z, consumers in Singapore and high-income households, who find “predictive suggestions based on everything the brand knows about you” to be slightly more useful than another low performer — “basic information (name, city, state/country).” In fact, new aggregate analysis of Airship platform data has found that personalization based on first name only has an equal chance of increasing or decreasing push notification direct open rates — with a potential decrease of up to 7x.

All these findings suggest what marketers have always suspected: customers want relevant personalization from brands they choose to engage with, but there are limits on what’s welcome and comfortable. Basic information doesn’t go far enough, and predictive suggestions go too far.

## Type of Personalization You Typically Find Most Useful from Brands by Generation



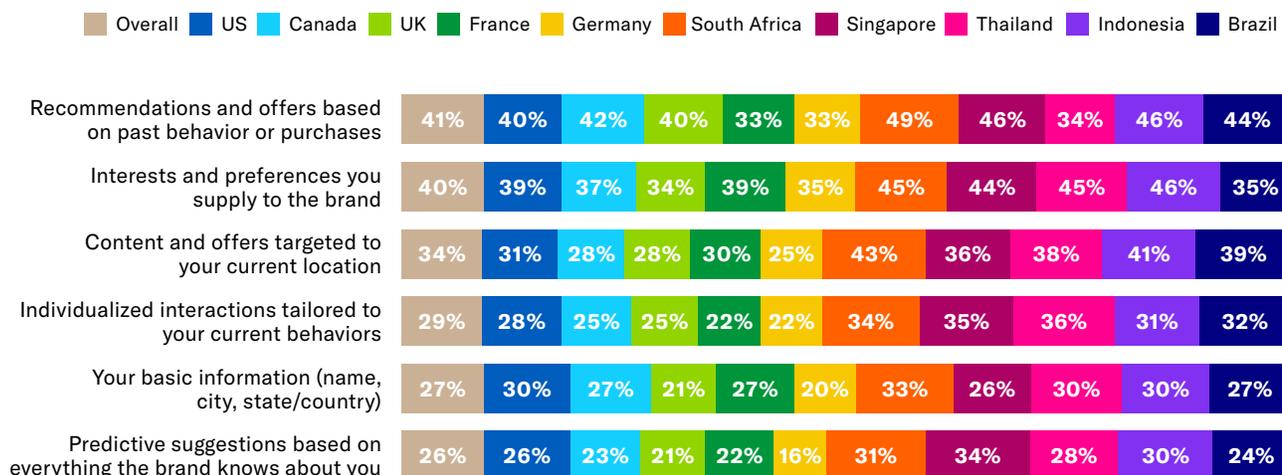
To drive the highest value for their customers and avoid the appearance of using more data than necessary, brands should keep their personalization strategies focused, transparent and above all, helpful.

As with many of the insights derived from this study, ranking on types of personalization deemed most useful held fairly steady across age groups. Gen Z offered some variation, with most preferring personalization based on “interests and preferences supplied to the brand.”

Ranking of personalization preferences in most countries surveyed fell along similar lines, though consumers in France, Germany and Thailand preferred “interests and preferences they supply to the brand” the most. With heightened privacy regulations in the EU, slight variation among European countries isn’t terribly surprising.

Importantly, consumers in nearly every country we surveyed were the least enthusiastic about brands using all they might know about them for personalization. New data privacy laws in the U.S. and EU, for instance, are clear indicators of consumer hesitancy around data usage. Respondents across each country ranked “predictive suggestions based on everything the brand knows about you” the lowest, with the exception of Singapore, where “basic information” was the lowest.

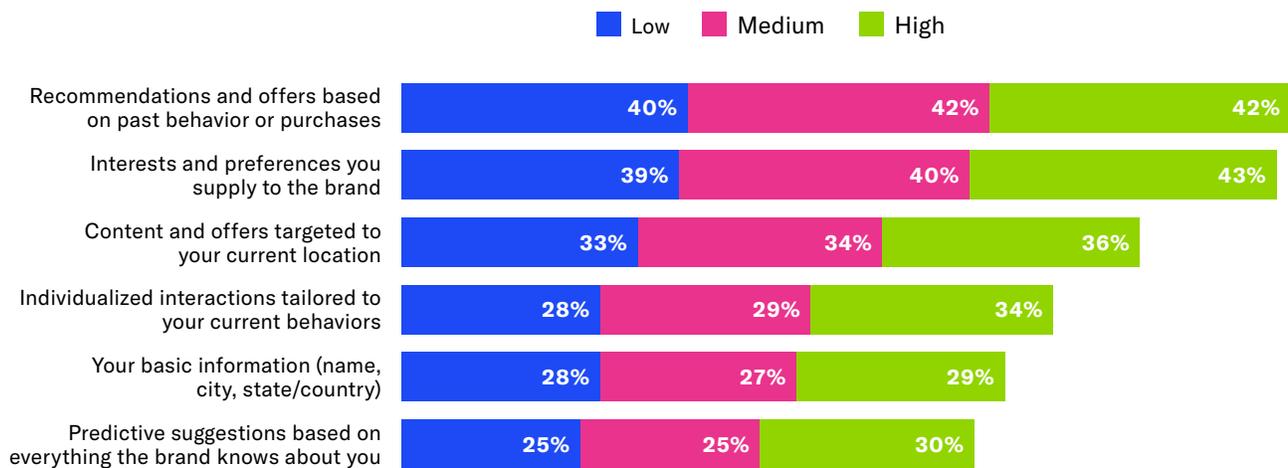
### Types of Personalization Customers Find Most Useful From Brands



We've all texted a friend or family member a screenshot of an ad we received that seemed to read our minds (or our conversations). That uneasy feeling is not something brands should aspire to provoke in their customers. Our data shows that consumers want personalized experiences, but on their own terms.

High-income households seemed to somewhat defy the data privacy concern trend. For most personalization types, high-income households were only a few points ahead at most, but they were noticeably more eager for “individualized interactions tailored to your current behaviors” and “predictive suggestions based on everything the brand knows about you” compared to other income levels.

### Higher Household Incomes Find Most Types of Personalization More Useful Than Other Income Levels



### Recommendation:

Your customers crave thoughtfully personalized experiences and are willing to share their data if it’s used to deliver value tailored to them. Your app should deliver experiences unique to each customer based on their interactions with your brand and zero-party data they have explicitly chosen to share. Ensure transparency in your personalization strategies — and avoid provoking feelings of intrusion — by limiting personalization to areas directly relevant to the customer’s interaction with your brand. Give them controls wherever you can, and adjust your personalization approach to various demographics and regions. Pay special attention to high-income households’ openness towards individualized interactions and predictive suggestions.

# Information Sharing Is a Delicate Dance

Now that we've identified the willingness of consumers to share with limitations, it's time to examine exactly what those limitations are.

We asked what information consumers would be willing to share with brands in exchange for personalized interactions and special incentives.

The answer: quite a lot. And we've touched on this when analyzing data from previous questions. Based on respondents from across the globe, consumers had a healthy willingness to share all 15 types of information we asked about — in fact, willingness grew for all types year-over-year.

Generally, consumers understand that in order to receive the convenience, value and ease they hope for in an app, they have to give you a way to reach them. "Email address" took top honors again this year, with 86% of consumers responding that they are likely to provide it.

That said, the reason consumers give their email addresses so freely suggests a complex situation, which we'll describe in more detail in the next section.

Further illuminating consumers' desire for relevant brand experiences, the second most shared type of personal information is "interests relevant to a brand" (ahead of even "name"). Last year, these two tied for second, so there's a bit of a shift here.

Rounding out the top five types of information, two-thirds or more of global consumers are willing to share "their communication preferences (channel, topic, frequency)" and "what they've browsed on a brand's app or website."

Across all 15 types of information we asked about, "What you value socially (environmental, moral, political or religious)" grew the most year-over-year, gaining 12 points. This year, 58% of respondents said they are likely to share their social values with brands.

**Besides their email address and name, the top 5 types of information two-thirds or more of consumers will share with brands are "interests relevant to a brand," "their communication preferences (channel, topic, frequency)," and "what they've browsed on a brand's app or website."**

This is all excellent news for brands with apps. Consumers want brands to take a much more customer-centric approach, and they are willing to share valuable information in return for mobile-enabled conveniences and personalized services. Besides helping to decrease opt-outs, this makes it easier for brands to deliver those personalized experiences that keep customers coming back for more.

But, it's not all sunshine and roses.

The types of information consumers are *least* willing to share are generally the ones that already underpin most digital advertising approaches today.

This should make brands shudder.

Only 46% of global respondents will share “what they’ve browsed across unrelated websites and apps.” Even fewer (44%) will share “information from their social profiles.” Sharing “real-world location throughout their day” was dead last (43%).

Although this is the information consumers are least likely to share, the percentage of consumers affirming their likelihood to provide it to brands *for the right value exchange* is remarkable and greatly encouraging. It may indicate both an understanding of advertising’s essential role and an appreciation for a mutual value exchange with brands they care about.

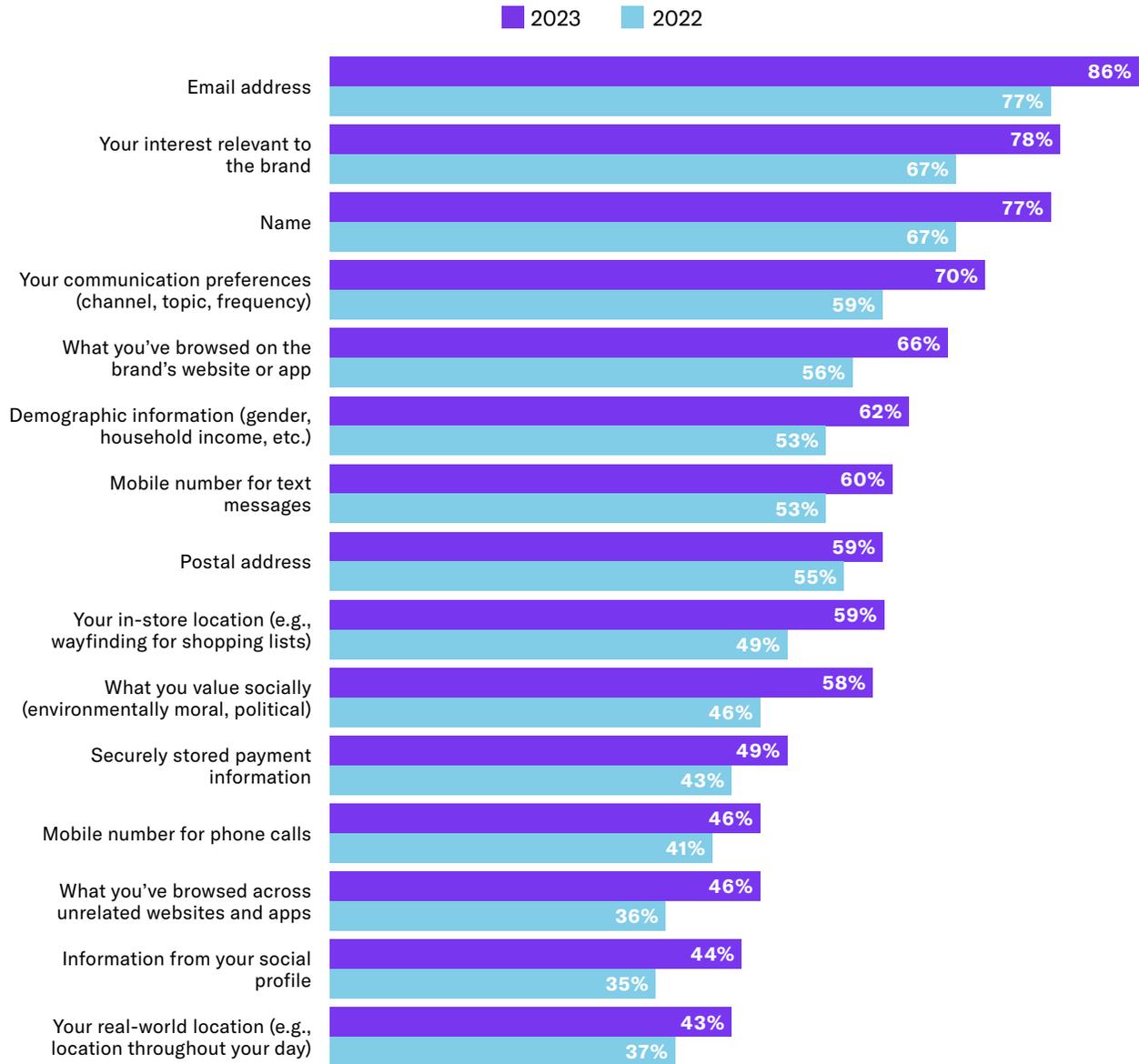
It’s a delicate dance today between brands on one hand, and on the other, consumers armed with a better understanding than ever of how their data is being used (and whether they want to share it). They are protective, but they also expect brands to up their game and deliver. When brands deliver, they get rewarded with more data. And the cycle repeats. It’s not just a delicate balance. It’s also a power shift, and one that brands ignore at their peril.

Basically, we’re seeing the clock run out on mining consumer information versus minding customer needs.

**The types of information consumers are least willing to share are generally the ones that already underpin most digital advertising approaches today.**

**This should make brands shudder.**

## Consumers Are More Willing to Share All Types of Information With Brands They Love for Personalized Interactions and Special Incentives

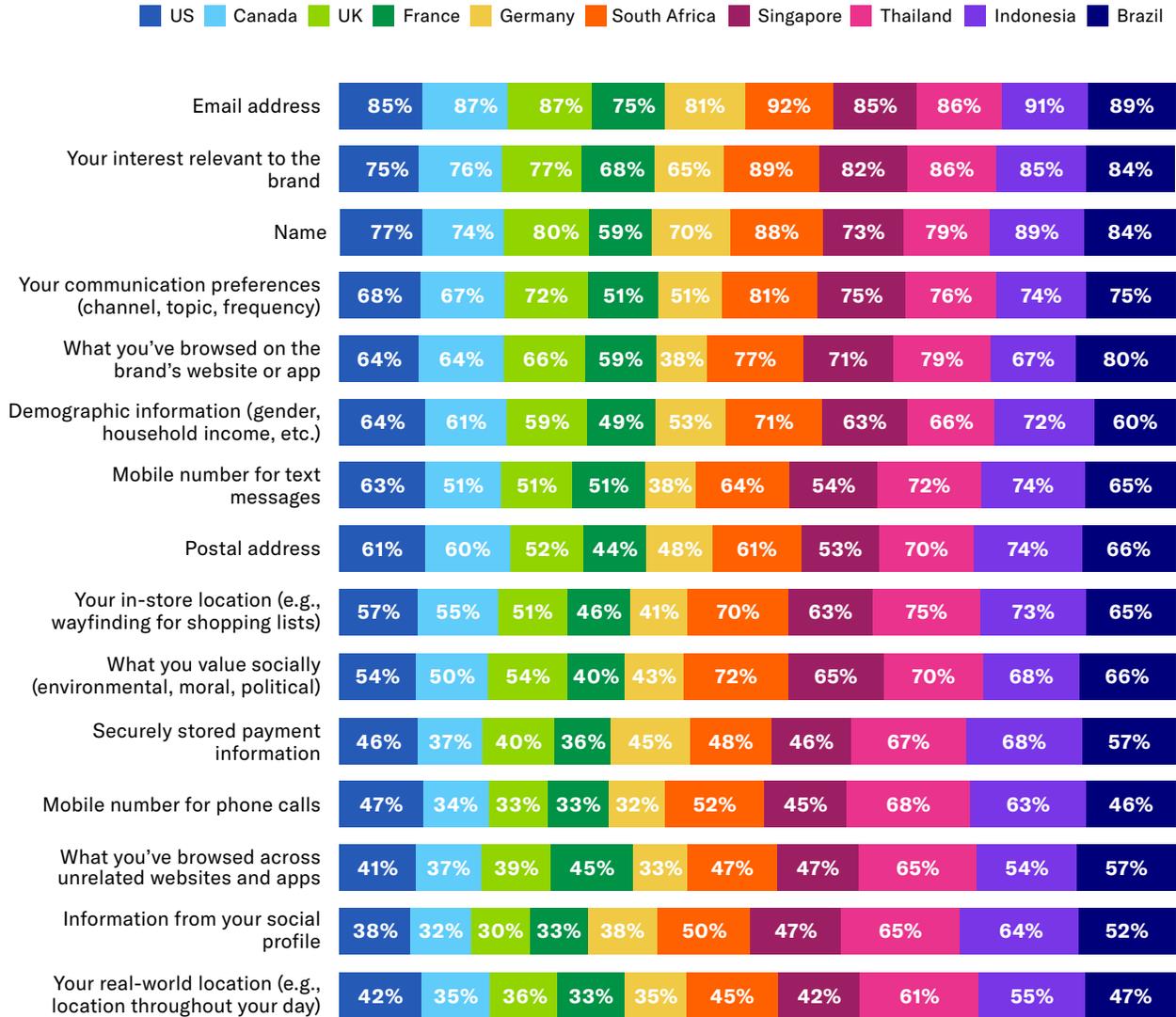


It's important to note that cultural differences can and do have a significant impact on consumer willingness to share certain types of information, with notable differences by country.

Although this year's survey included 10 countries — three more than last year — five overlapped for year-over-year analysis, shedding further insights on the findings in the chart above. Most of the noteworthy year-over-year insights we gathered came from trends we saw in the European countries we surveyed. Here's what we found:

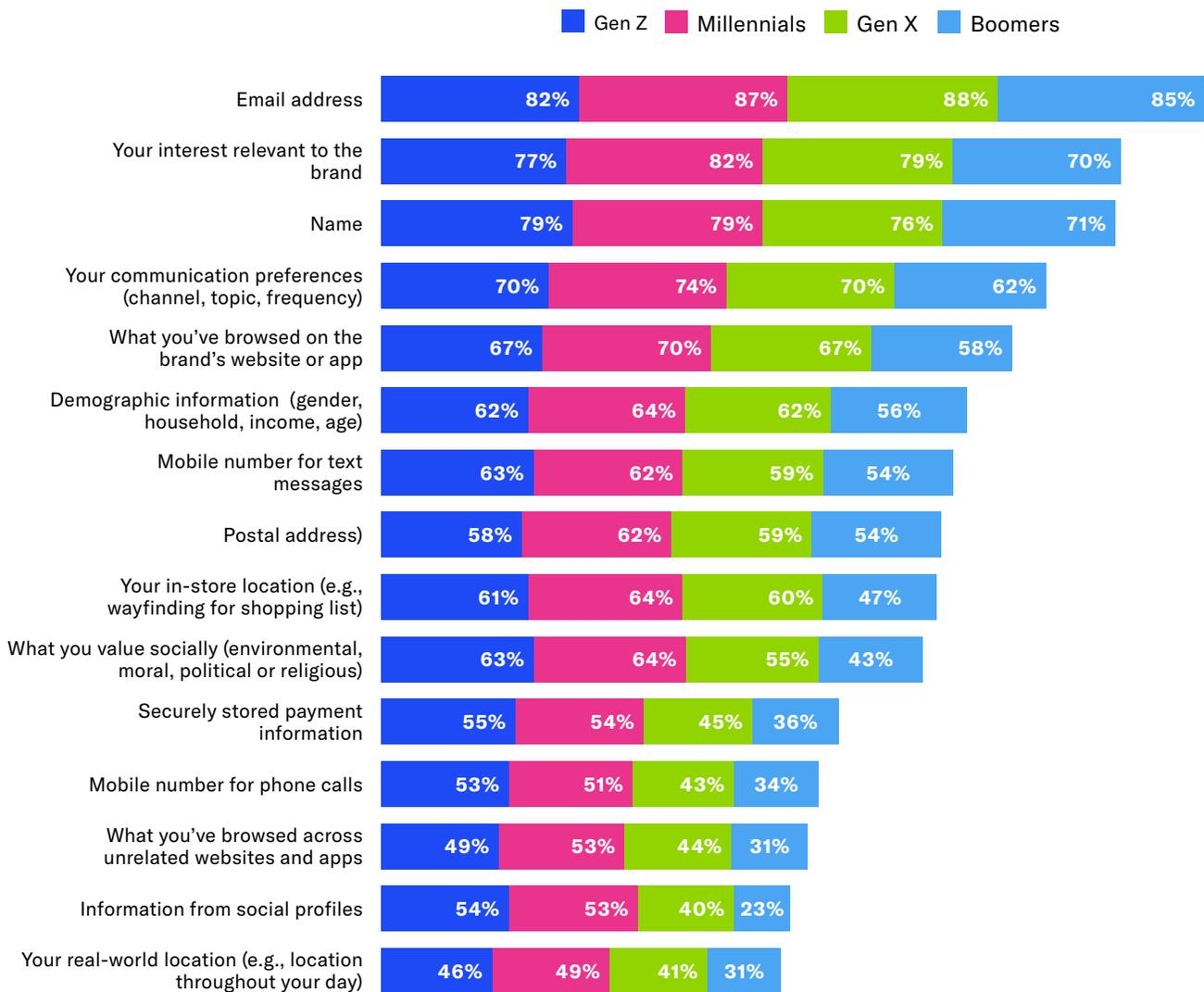
- The U.S. and Singapore saw increases in likelihood to share all 15 types of information year-over-year.
- More Germans than last year will share each type of information with two exceptions: “postal address” and “securely stored payment information,” which are shared at the same rate as last year.
- French consumers' willingness to share information with brands declined across four types of information: “postal address,” “mobile number for texts,” “mobile number for phone calls” and “information from your social profiles.”
- British consumers share most types of information with brands at a greater rate than French consumers. However, the proportion of British consumers likely to share specific types of information declined year-over-year across six categories vs. four for France.
- Consumers in Germany and France are the most reluctant to share information with brands among all the 10 countries we surveyed. Both countries had the lowest share of consumers who were likely to share seven out of 15 types of information. Respondents from the U.K., though, had the lowest share of consumers who were willing to share “information from your social profiles” (30%).

## Consumers' Willingness to Share Different Types of Information with Brands Varies by Country



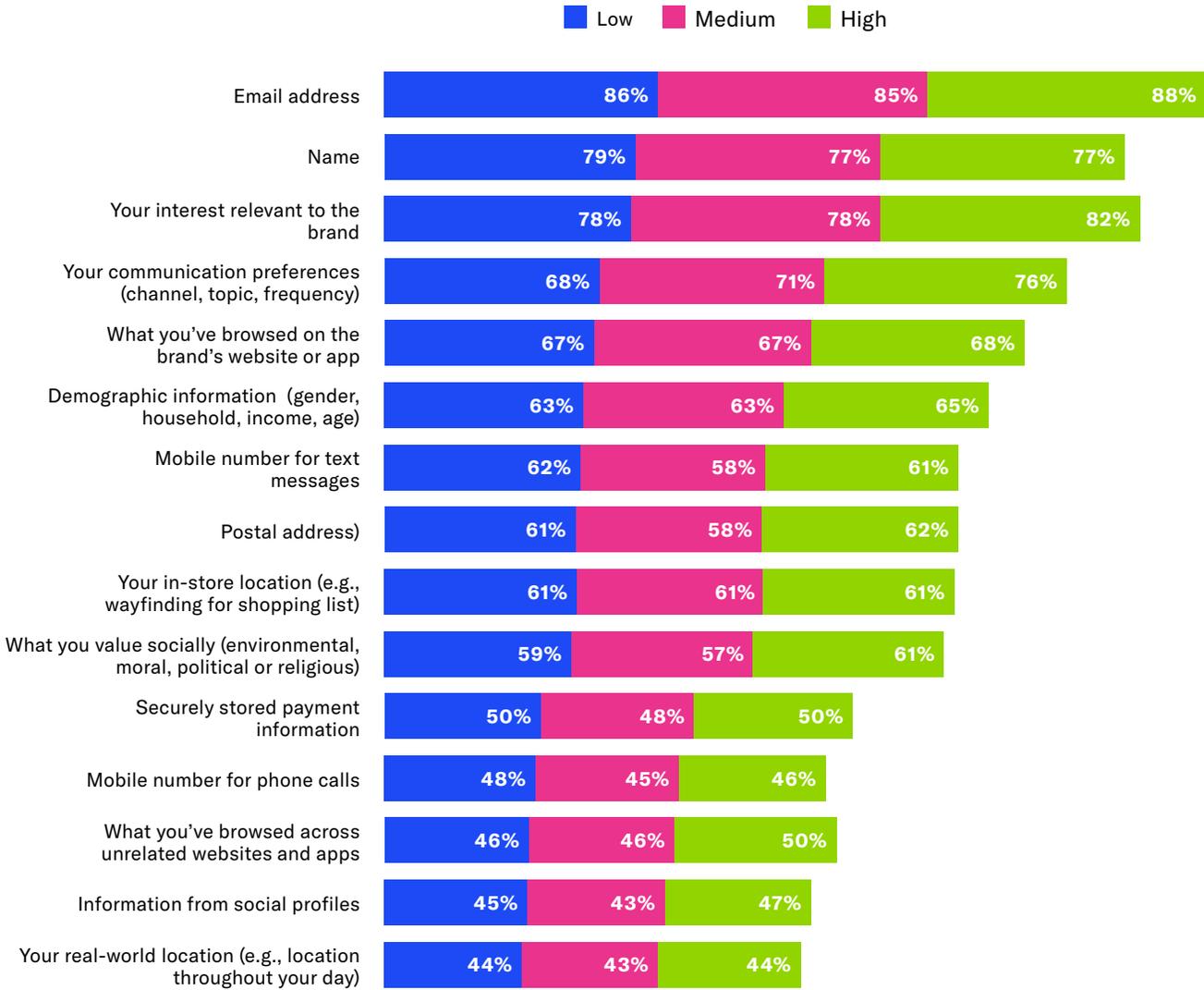
Across age groups, boomers are the least likely to share all the types of information we asked about compared to other generations – other than “email address,” where Gen Z is most reluctant. This shouldn’t be too surprising given how wary boomers are about data and data privacy, according to Statista. Millennials were the most likely to share all types of information with the exception of “email address,” where Gen X edged out millennials by a single point at 88%.

**Boomers Are Least Likely to Share All Types of Information Other Than Email Address, Where Gen Z is Least Likely**



For income levels, the broader global story also largely ran true: across all household incomes, consumers were the most likely to share “email addresses,” followed either by “interests relevant to a brand” or “name.” With the exception of “mobile number for text messages,” “mobile number for phone calls” and “name,” high-income households are more likely to share other types of information with brands. While the relationship between household income level and concerns about data privacy is not entirely clear, Pew recently offered some insight. Researchers found that 68% of adults in households with low incomes said they read privacy policies, compared to 52% of those in higher income households.

**Other Than Mobile Number and Name, High-Income Households Are More Likely to Share Most Types of Information with Brands**



**Recommendation:**

As consumers demonstrate a willingness to share certain types of information for personalized experiences and incentives, ensure your app focuses on gathering data that your customers are most willing to share, such as email addresses and interests relevant to your app and brand. Willingness varies by location, age and income, so cater your data collection, segmentation and personalization strategies to these factors. If consumers opt out of some level of data sharing, consider it an opportunity to build trust and affinity for your brand over time, leveraging strategies that engage these individuals where they’re comfortable, and encourage them to share more as you build trust.

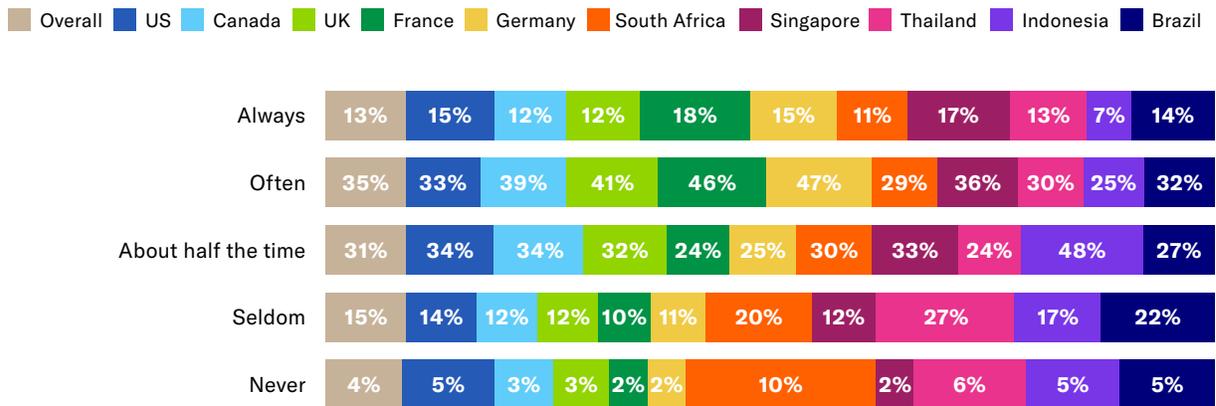
# Emails Increasingly Left Unread

[More than 306 billion emails are sent and received every day.](#) Marketers still rely on email to reach and engage consumers. It's often the first point of identification and conversion a brand has. Just as with opting in to app notifications, many consumers are willing to share their email addresses to receive value in return. With varying interpretations of the word "value," it may not come as a surprise to hear that many marketing emails are ignored.

Average email open rates have been dropping precipitously over the past three years, with the open rate falling from around 22% at the start of 2020 to just above 12% in October of 2022, as shared at Gartner's Marketing Symposium 2023.

Across the globe, an overwhelming 79% of the consumers surveyed reported ignoring or deleting marketing emails from brands they've subscribed to half the time or more. Consumers in France (88%) and Germany (87%) had the highest rates of ignoring or deleting emails half the time or more. Consumers in Thailand and South Africa reported doing so the least — but the "least" here is still well over half of consumers in those countries (67% and 70%, respectively).

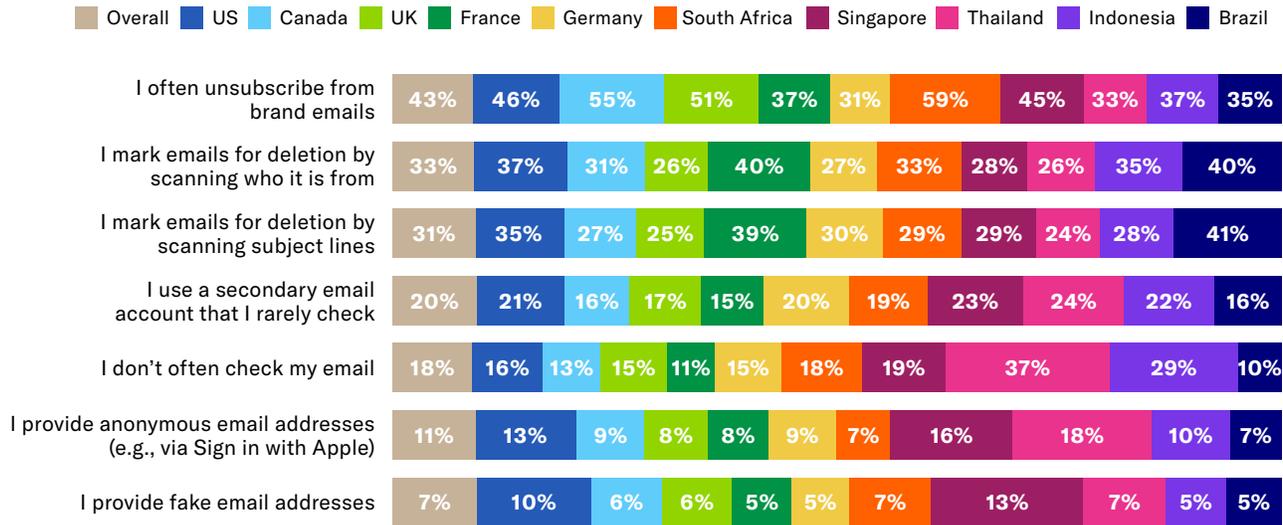
## Globally, 79% of Consumers Ignore or Delete Emails from Brands Without Reading Them at Least Half the Time or More



Across the globe, an overwhelming 79% of the consumers surveyed reported ignoring or deleting marketing emails from brands they've subscribed to half the time or more.

Between ignoring, unsubscribing, or even creating new email addresses just to avoid brand marketing messages, consumers are sending a strong message to brands about their communication preferences: 43% of global consumers “often unsubscribe from brand emails,” 33% “mark emails for deletion by scanning who it is from,” 31% “mark emails for deletion by scanning subject lines” and 20% “use a secondary email account that I rarely check.”

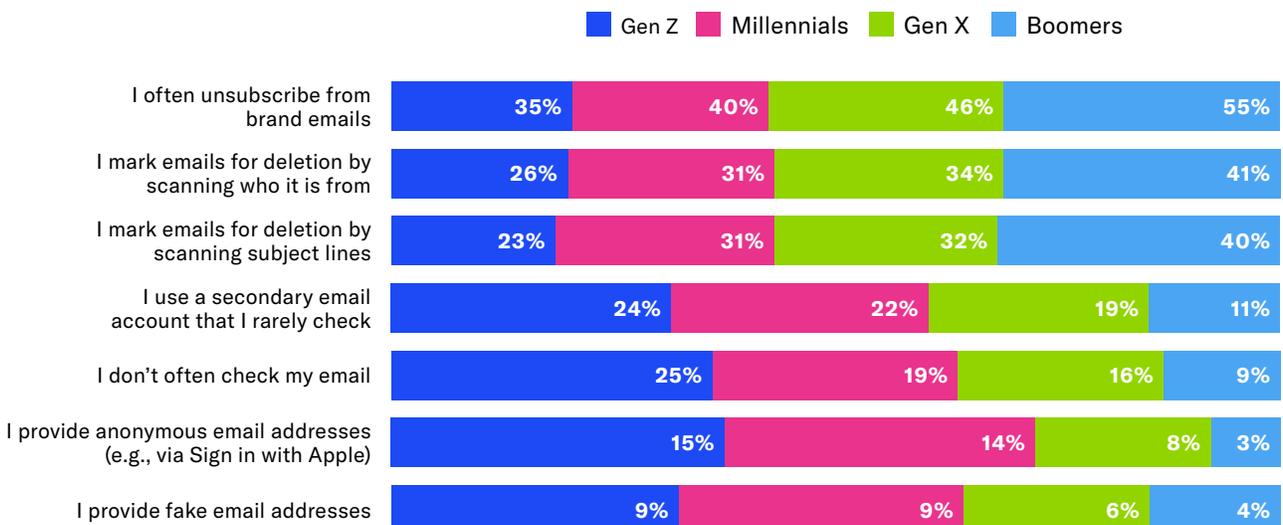
### How Consumers Ignore and Avoid Commercial Email Marketing



We didn't find significant differences across income levels and generations when it came to the frequency of ignoring or deleting emails, but we did find key points of variation in terms of how consumers avoid email.

Younger generations, led by Gen Z, are less likely than Gen X and boomers to pursue traditional methods of avoiding commercial email – unsubscribing or deleting emails by scanning sender or subject lines. Instead, they are much more likely to say they don't often check their email, use a secondary email account they rarely check, and use anonymous email addresses (e.g., via Sign In with Apple) or fake ones.

### Younger Generations Are More Proactive in Email Avoidance, and Are Less Likely to Use Traditional Methods of Managing It

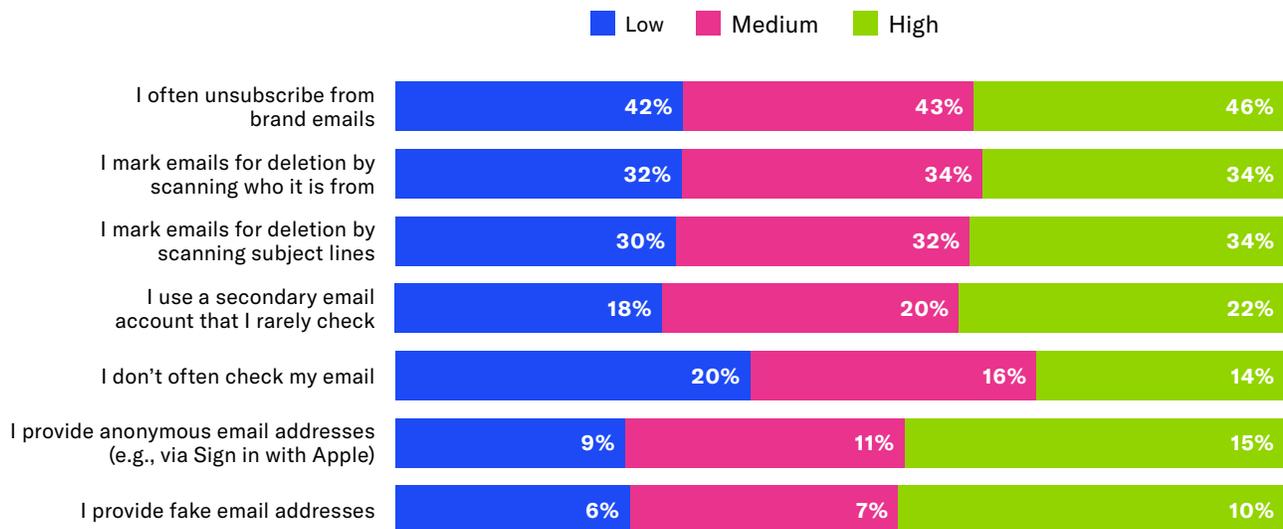


Not only are brand’s youngest consumers becoming harder to reach, consumers from high-income households are too.

While there isn’t much variation in how often household income levels ignore marketing emails, it’s worth taking a look at the methods high-income households use to avoid emails. High-income consumers lead in five of seven methods of avoidance, spanning both traditional and newer methods, including “I often unsubscribe from brand emails,” “I mark emails for deletion by scanning subject lines,” “I provide a secondary email account that I rarely check,” “I provide anonymous email addresses” and “I provide fake email addresses.”

However, it’s worth pointing out that as you go up the household income ladder, the rate of not checking email decreased, with low-income households reporting “I don’t often check my email” the most (20%), compared to high-income households (14%).

### High-Income Households Lead In Many Methods of Avoiding Commercial Email



Adding value is as likely a driver for email as it is for app notifications. Consumers today want and expect brands to deliver value at every touch point. But especially with younger consumers, technical advances have made it easier than ever for individuals to avoid handing out their email addresses or receiving “unwanted” emails from brands.

For instance, Apple introduced features within its Mail app, Safari and iCloud+, that hide IP addresses so a user’s digital activity can’t be assembled into a user profile. Mail Privacy Protection in its Mail app prevents senders from using pixel trackers in email to collect information, such as whether the email was opened or not — in fact, now all emails will appear to have been opened. Providers like Proton, Hey and Zoho block trackers and allow users to simply remove senders from their inboxes without needing to unsubscribe. These advances seriously impact data quality and stymie email hygiene efforts, putting sender reputation at risk and creating deliverability problems.

### **Recommendation:**

**Add value to every communication by moving away from mass mailing and towards personalization based on the recipient’s preferences, past interactions and current behaviors. Take advantage of the email address as the most common identifier customers are willing to share, and use email to promote your app strategically with customers who have yet to discover it. With recent advances in email privacy, strive to use these challenges as an opportunity to refine your strategy, respect user privacy and establish additional channels of communication, enabling you to build trust and create stronger bonds with customers over time.**

# App-Based Messaging Now, Not Later

How frequently do consumers want their app-based messaging? For the most part, “immediately, as often as it happens” led as the preferred frequency for five of eight types of messages.

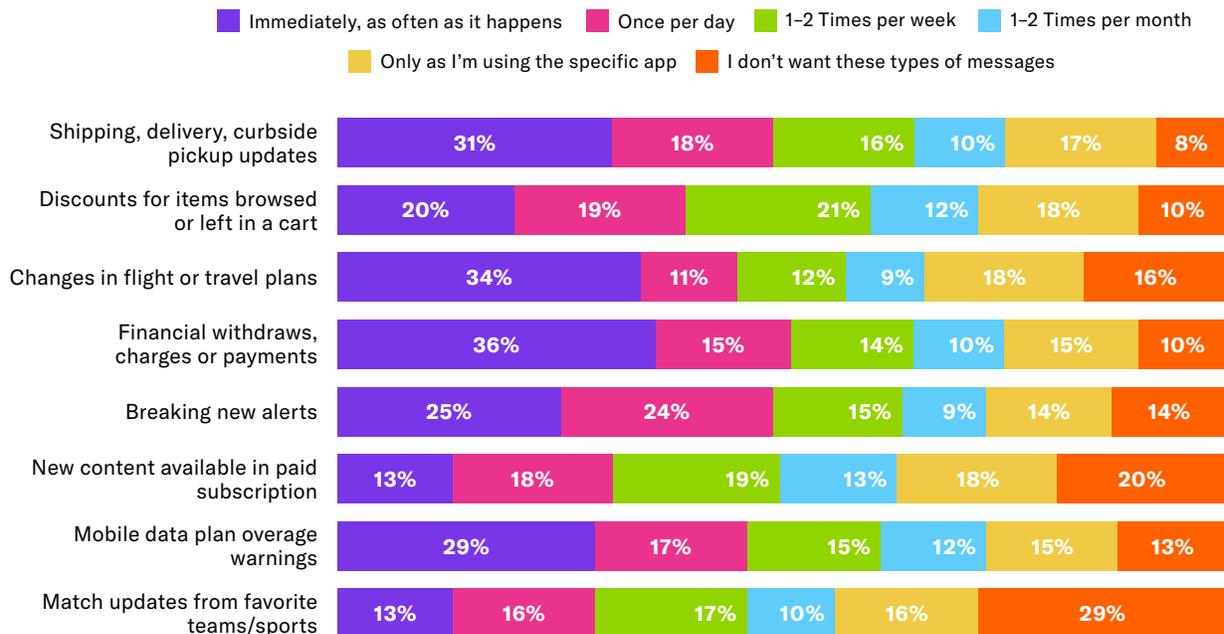
The kind of immediacy that consumers want, though, is more nuanced than it may seem on its face. The only frequency option gaining preference across seven message types tracked year-over-year was “only as I’m using the specific app.”

That makes a lot of sense from the customer’s perspective considering everything everywhere tries to give them another inbox. A growing percentage are most receptive to messaging when they’re already focused on your brand and in your app — so messages are welcome, or at least in-line with their current focus, rather than being distracting or intrusive.

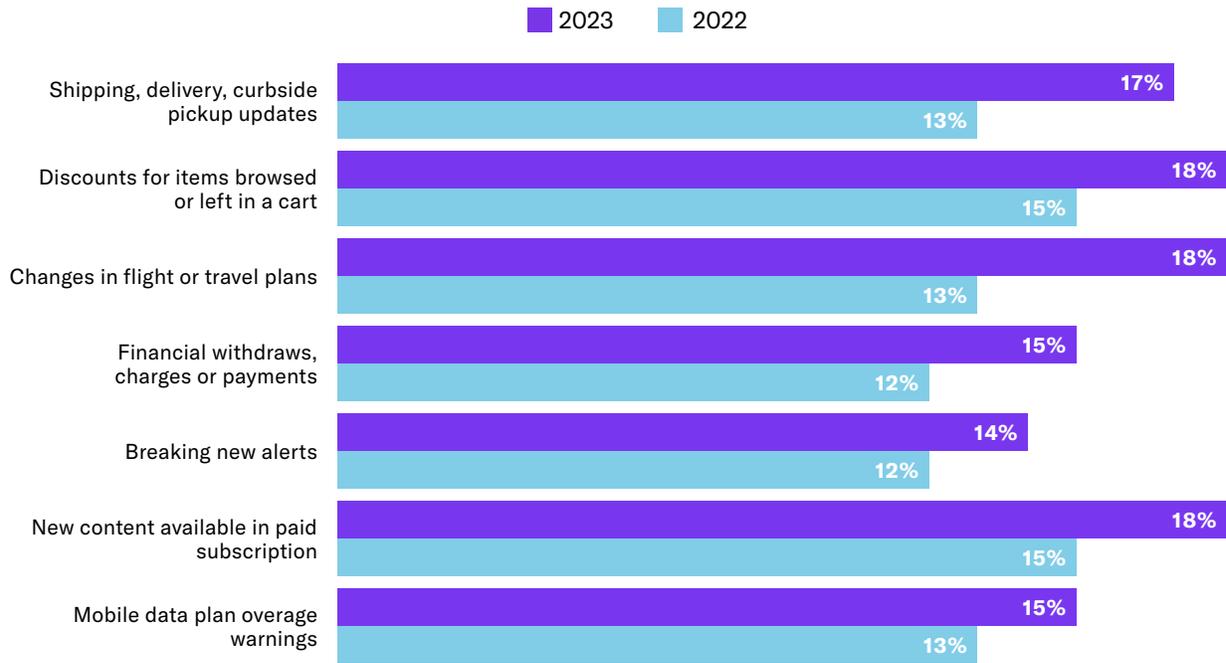
The three outlier message-types, where “immediately” wasn’t the top frequency choice, were “discounts for items browsed or left in a shopping cart,” “new content available in paid subscription” and “match updates from favorite teams/sports.” The largest number of respondents wanted to receive each of these “1-2 times per week.”

These last two message types had the greatest percentage of respondents saying they didn’t want them, at 20% for “new content available in paid subscription” and 29% for “match updates from favorite teams/sports.”

## More Consumers Want to Receive Most Types of App-Based Messaging Immediately, and as Often as It Happens

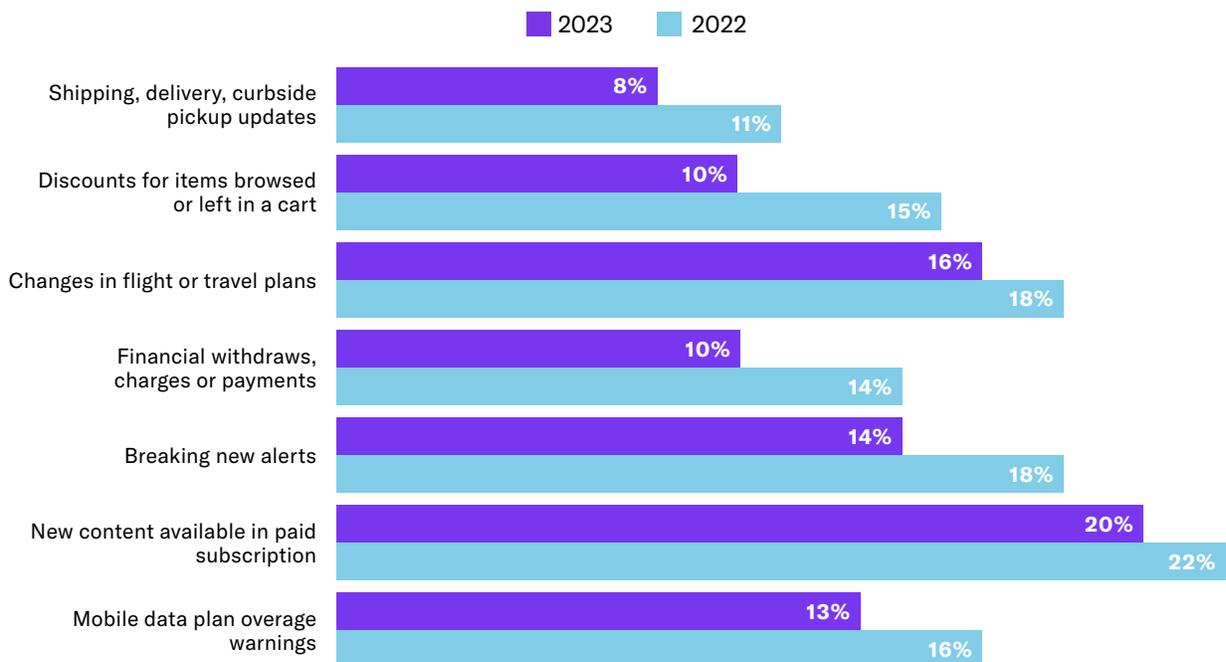


### All Types of App-Based Messaging Saw Increases in Consumers Saying They Only Want to Receive Them While Using the Specific App



Consumers are relying on brands to keep them in the know as much as possible. We found that across the seven types of messages we asked consumers about year-over-year, fewer respondents said they “don’t want these types of messages.” In any case, it’s imperative for brands to listen to how often and where consumers want to receive different types of messages.

### All Types of App-Based Messaging Saw Reductions in Consumers Saying They Don’t Want Them



There are, obviously, many different preferences for frequencies of app-based messaging. This only further highlights why it's crucial for brands to give customers control over the types of messages they receive, and where and how often they get them.

Brands who haven't already added in-app messaging should swiftly do so to reach the growing segment of customers who want engagement only when they're focused on your brand. It's an important addition to push notifications, which reach the nearly 2X more customers who prefer messaging "immediately, as often as it happens."

### **Recommendation:**

To create better customer experience, focus on delivering app-based messaging with instant updates and value-driven content. Timing is key — from real-time notifications triggered by events occurring anywhere, to in-app messages displayed in-session, in-context and even on specific screens. Experiment with varied messaging types — transactional, promotional, triggered or lifecycle — and adjust frequency based on customer interactions and goal-based outcomes.

# Life Gets Better, Literally, with Apps

Besides looking to apps to simplify their lives, consumers want to use apps that will literally improve their lives – that is, their health and well-being.

While this might not seem all that surprising (and you perhaps use apps this way or know people who do), the sheer percentage of global consumers who leverage apps to better their lives this way is remarkable.

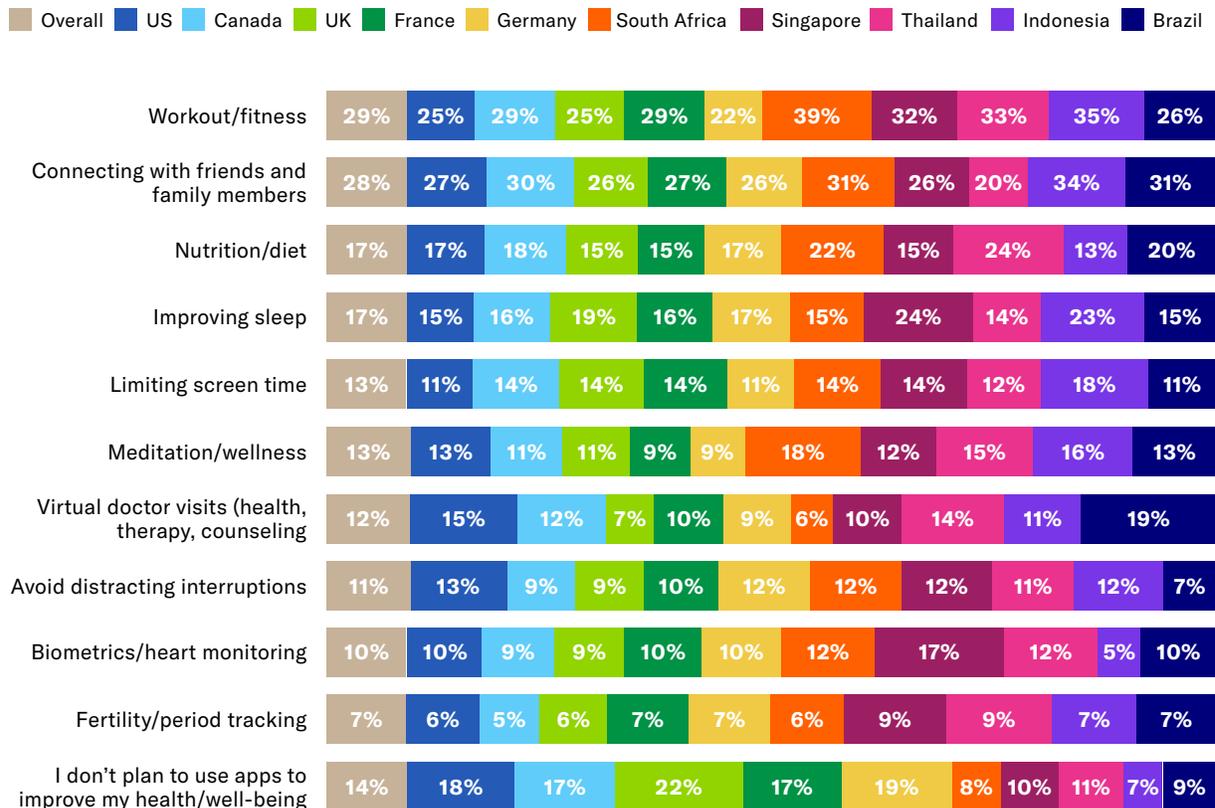
A full 86% of the 11,000 global consumers we surveyed said they plan to use apps to improve their health and well-being. The top four ways they'll use apps this way are for “workout/fitness” (29%), “connecting with friends and family more” (28%), “nutrition/diet” (17%) and “improving sleep” (17%).

We found some variation in uptake between the countries we surveyed.

Consumers from South Africa, Singapore, Thailand, Indonesia and Brazil had significantly higher adoption of apps for health and wellness than consumers from the other countries we surveyed.

The U.K. led in the percentage of consumers that “don’t plan to use apps to improve their health and well-being” at 22%, followed by Germany at 19% and the U.S. at 18%.

## How People Will Use Apps to Improve Their Health and Well-Being in 2023



Across household income levels, adoption rates for the 10 health/wellness app-enabled activities are remarkably similar. This suggests apps have democratized access to a broad range of beneficial health/well-being services.

The generational picture, however, does offer key variations. Younger generations are significantly more inclined to use apps to improve their health and well-being: Gen Z expressed the greatest intent at an astonishing 94%, followed by millennials at 92% and Gen X at 84%. Boomers trailed at 67%, but that's still two-thirds of the oldest consumers. The clear takeaway here is that brands cannot ignore the popularity and potential of helping customers improve their well-being with apps.

### **Recommendation:**

**If your target demographic consists largely of younger generations like Gen Z and millennials, consider incorporating health and wellness features into your app, as these groups show a significant interest in improving their well-being through digital solutions. Onboarding experiences focusing on wellness benefits, along with incentives, community features and gamification to drive habitual use, can go a long way in making everyone's lives better.**

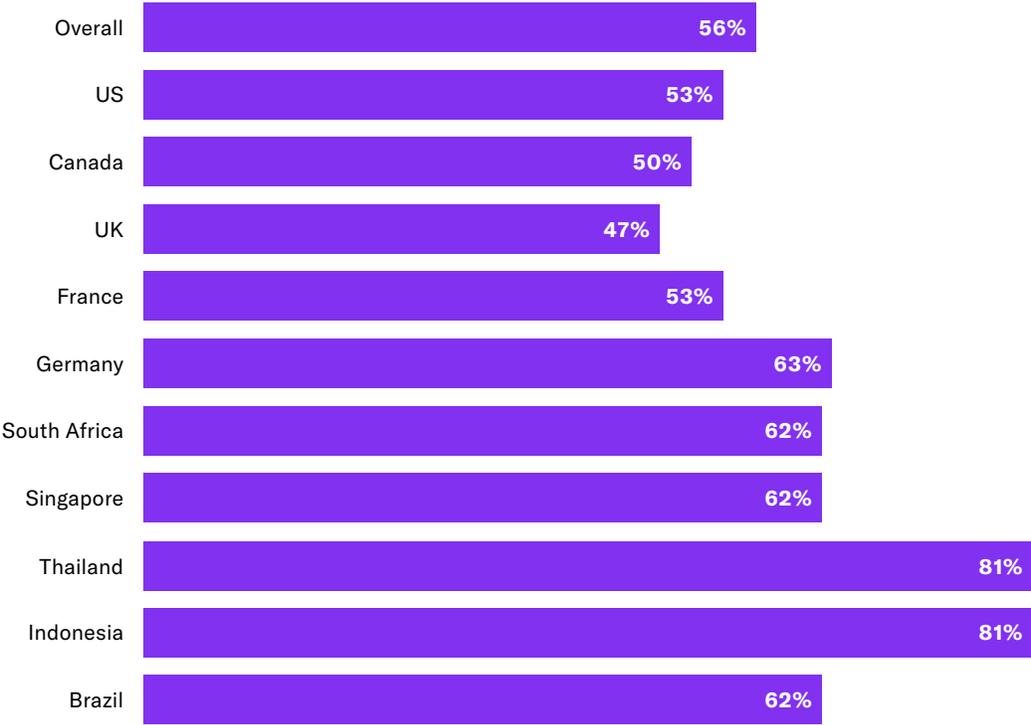
# New Experiences Put Customers in Control

Given that both Google and Apple first focused on digital well-being in a major way at their 2018 developer conferences, we wanted to investigate adoption and satisfaction with some of the latest enhancements – namely, Apple’s Focus and Live Activities introduced with iOS 15 and iOS 16, respectively. Both are meant to limit distractions and interruptions, while keeping people tuned in to the information and apps that matter in different moments of their day.

If you combine the percentages of consumers who said they want to “limit their screen time” and “avoid distracting interruptions” in response to our question about specific health and well-being activities (from the section above), you’d end up with digital well-being as the third most popular app-enabled health and wellness activity globally.

Apple introduced Focus in September 2021 and has seen significant adoption from its users: 56% of the iPhone users we surveyed said they have used Focus to limit distractions throughout their day. Thailand and Indonesia were the countries where the largest percentages of consumers reported using Focus (both were at 81%), while the U.K. had the lowest percentage.

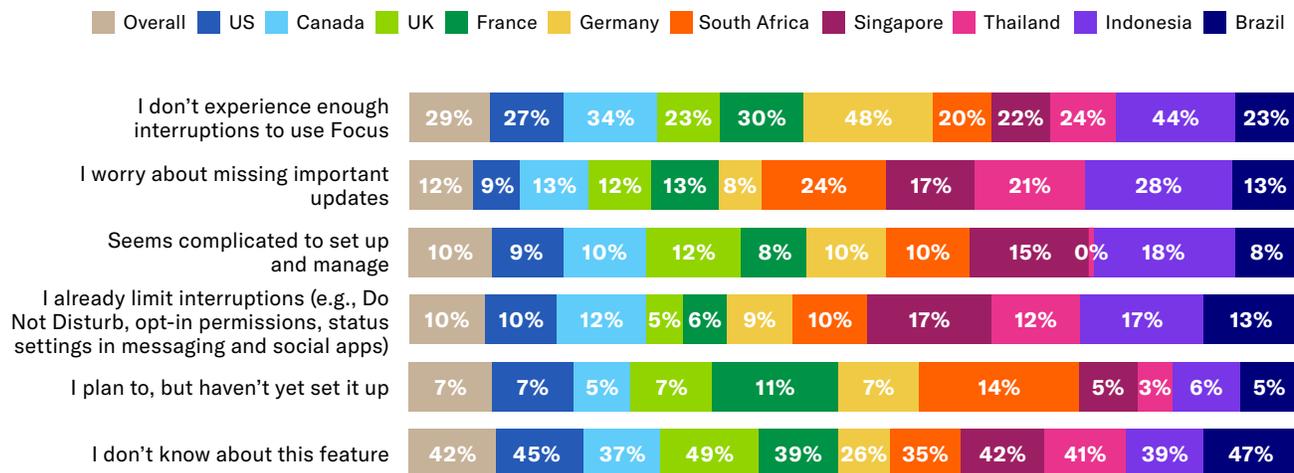
## Most Consumers Use iOS Focus to Limit Distractions in One or More Parts of Their Day



The most digitally-native generations particularly prize managing their digital wellness. More than three-quarters (77%) of Gen Z have used Focus, followed by 69% of millennials, 42% of Gen X and 22% of boomers.

More than 70% of consumers who reported not having used Focus either feel they “don’t experience enough interruptions” (29%) or they “don’t know about this feature” (42%).

### The Reasons Consumers Haven’t Used iOS Focus Are Mainly Due to Not Being Aware of the Feature or Not Experiencing Enough Interruptions

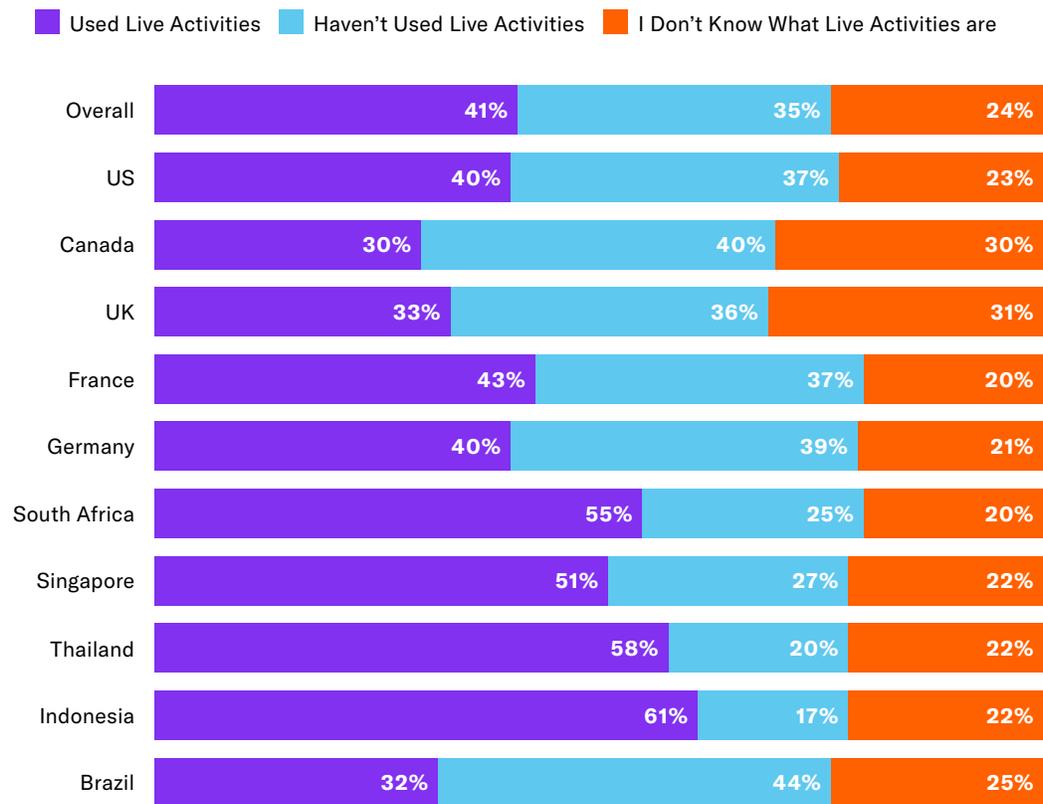


Apple launched Live Activities about a year after Focus in October of 2022. Our survey found that 41% of iPhone respondents have “used Live Activities” with their apps, while 35% haven’t and 24% don’t know about Live Activities. Considering its recency, Live Activities is seeing rapid uptake.

In addition, global consumers are largely satisfied with Live Activities: 62% of consumers who have used Live Activities rated their experience as “Good” or “Exceptional,” while only 6% rated their experience as “Poor” or “Bad.”

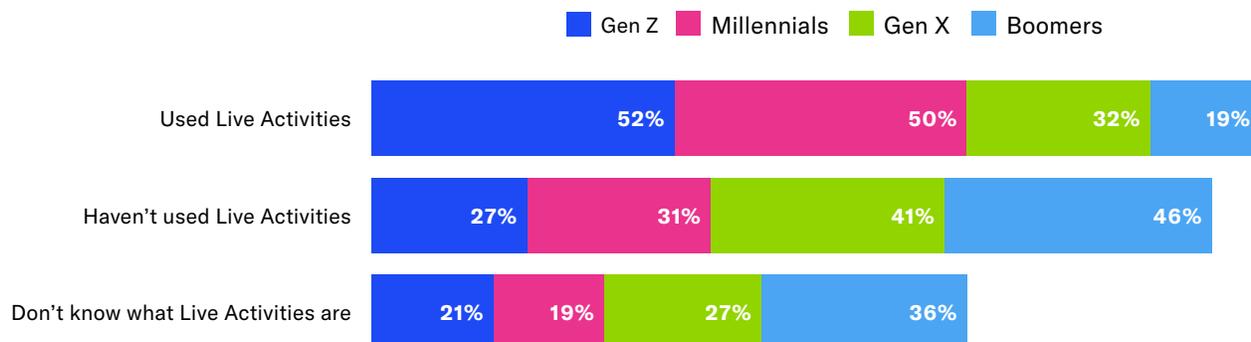
Our survey found noteworthy points of variation between countries when it came to adoption of Live Activities. Thailand (58%) and Indonesia (61%) were the countries that saw the highest percentages of consumers saying they used Live Activities, while Canada (30%) and Brazil (32%) saw the lowest. Brazil was also the country with the highest percentage of iPhone users who said they “haven’t used Live Activities” (44%). The U.K. (31%) and Canada (30%) were the countries with the highest percentages of consumers who “don’t know what Live Activities are.”

### Many People Are Using Live Activities with Apps, but Many Remain Unaware of the Feature



The generational picture for Live Activities is similar to the generational picture for Focus. Younger consumers again were the leaders in adopting Live Activities, with 52% of Gen Z and 50% of millennials saying they “used Live Activities” with their apps, compared to the only 32% of Gen X and 19% of boomers.

### Gen Z and Millennials Lead in Using Live Activities



While Focus has been on the market longer than Live Activities — and more iPhone users are leveraging Focus (56%) than Live Activities (41%) — more users are unaware of Focus (42%) than are unaware of Live Activities (24%). Live Activities likely gained greater visibility from high-profile activations, [like that of the World Cup](#), in addition to brands increasingly offering Live Activities to app users. This contrasts to the implementation of Focus, which relies on users to set up the capability on their own.

This is not to say that Focus has been on the sidelines. Apple placed Focus settings under the spotlight at [WWDC 2022](#), where they introduced the ability to have multiple customizable Lock Screens that can be tied to different Focus settings.

In line with themes throughout this survey, the more rapid adoption of Live Activities, (which doesn't require much, if any, “work” on the part of consumers) and the slower, yet still significant, adoption of Focus (which requires more hands-on effort on the part of consumers), together demonstrate the willingness of consumers to adopt new apps and features as long as the value outweighs the effort.

### Recommendation:

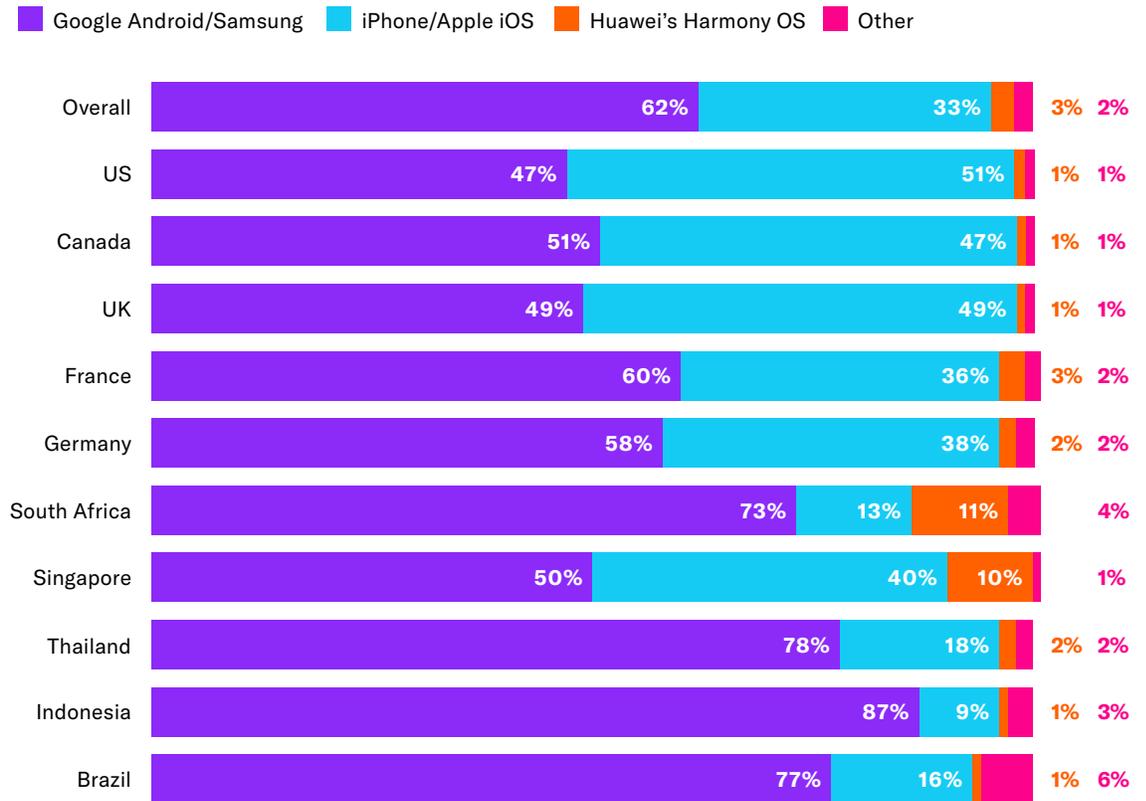
**We live in the attention economy and customers are painfully aware that their time is scarce. Your app should deliver convenience and value to your customers at every point of interaction, respecting and rewarding their attention. Adopting new features — like Apple's Live Activities, that engage customers with real-time, always-on updates at a glance on the lockscreen — can reduce interruptions, while keeping them up to date. Educate your customers when you augment your app to increase awareness and guide users in leveraging these features.**

# Methodology

This survey was completed in partnership with Sapio Research among more than 11,000 global consumers 18 and older in the U.S., Canada, U.K., France, Germany, South Africa, Singapore, Thailand, Indonesia and Brazil. Overall results are accurate to  $\pm 0.9\%$  at a 95% confidence level.

Respondents included consumers who own a smartphone where apps can be installed. Across operating systems, they broke out as follows:

## Across 10 Countries, Android's Market Share Lead is Only Surpassed by iOS in the U.S. and Tied in the U.K.



# About Airship

Mobile app customers are 3x more valuable than non-app customers.  
Airship enables brands to capture that value.

At the dawn of apps, Airship delivered the first push notifications and first in-app messages. Then we powered the first mobile wallet boarding passes, now the digital norm for travelers. In 2022, we enabled the first commercial use of Live Activities on the day it was launched by Apple. In 2023, Airship launched the world’s first no-code native app experience editor, enabling marketers and product managers to get work done in minutes instead of months, without ongoing developer support.

With these innovations, the Airship platform provides an end-to-end solution for capturing value across the entire customer app lifecycle — from acquisition and activation to engagement and loyalty. It starts with Airship’s market-leading app store optimization (ASO) solutions promoting app discovery and downloads. Then our unified journey orchestration, content creation and experimentation solutions kick in. App teams can quickly design, deploy and iterate no-code native app experiences and cross-channel campaigns — bridging inside-the-app experiences with outside-the-app messaging.



**When it comes to helping leading brands create and capture customer value — inside and outside the app™ — no one knows more, does more or cares more than Airship.**

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