

Live Video Analyst Series

GLOBAL MOBILE PAYMENTS



OUR FORECAST



US



TRENDS





OUR FORECAST

WORLDWIDE

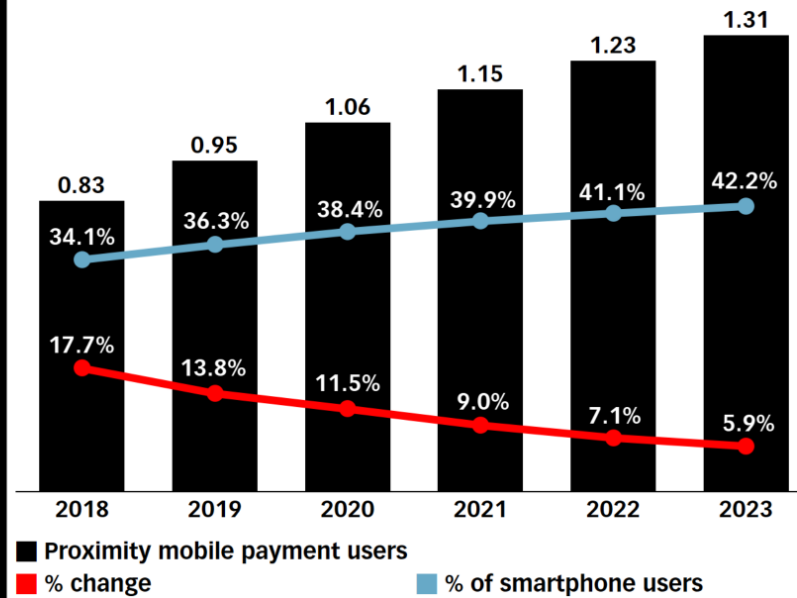
**STRONG
ADOPTION**

**CHINA VS. THE
REST OF THE
WORLD**

BY COUNTRY

How Many People Worldwide Use Proximity Mobile Payments? 2018-2023

billions, % change and % of smartphone users



Note: ages 14+; mobile phone users who have made at least one proximity mobile payment transaction in the past six months; includes point-of-sale transactions made by using mobile devices as a payment method; excludes transactions made via tablet

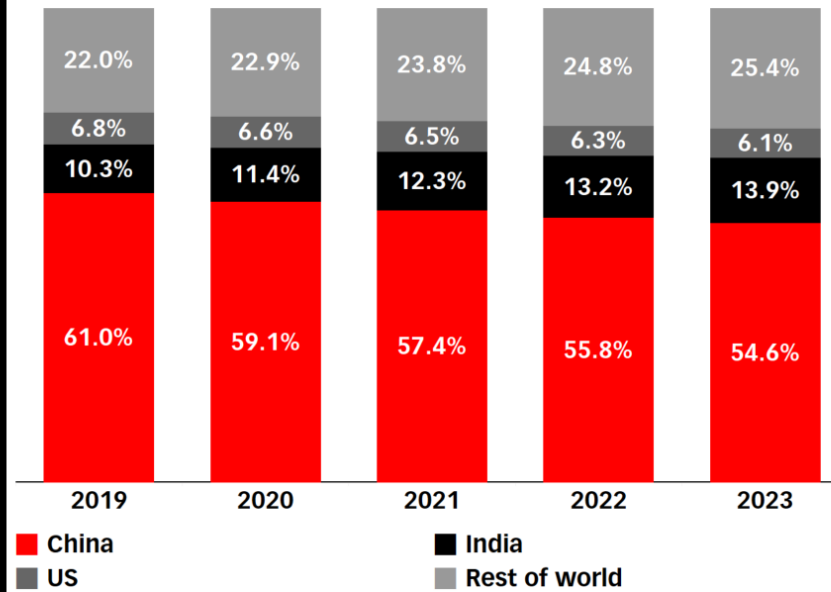
Source: eMarketer, October 2019

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www.eMarketer.com

Proximity Mobile Payment User Share Worldwide, by Country, 2019-2023

% of total



Note: ages 14+; mobile phone users who have made at least one proximity mobile payment transaction in the past six months; includes point-of-sale transactions made by using mobile devices as a payment method; excludes transactions made via tablet; numbers may not add up to 100% due to rounding

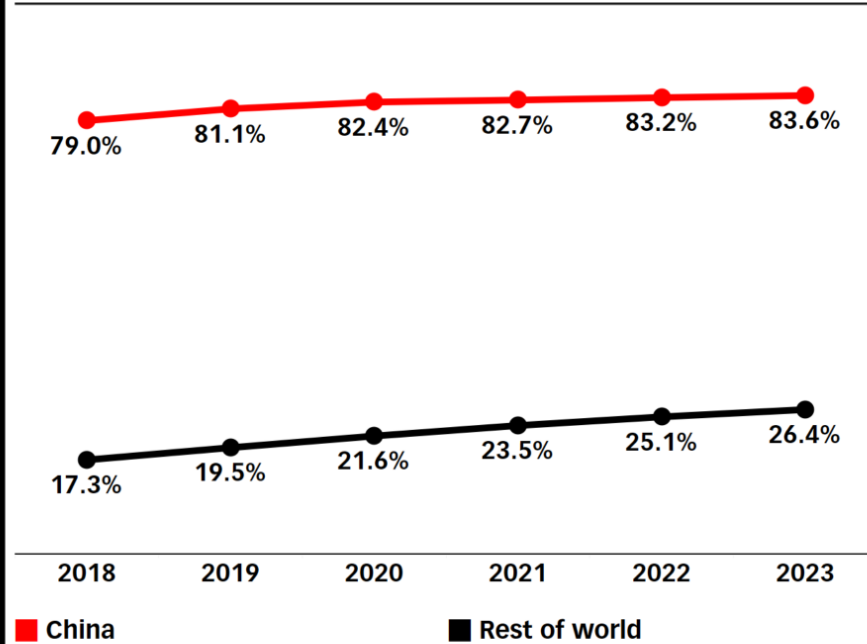
Source: eMarketer, October 2019

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www.eMarketer.com

Proximity Mobile Payment User Penetration Worldwide, China* vs. Rest of World, 2018-2023

% of smartphone users



*Note: ages 14+; mobile phone users who have made at least one proximity mobile payment transaction in the past six months; includes point-of-sale transactions made by using mobile devices as a payment method; excludes transactions made via tablet; *excludes Hong Kong*

Source: eMarketer, October 2019

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Proximity Mobile Payment Users Worldwide, 2019

% of smartphone users

Widespread Adoption

China 81.1%

Very High Adoption

Denmark	40.9%	South Korea	36.7%
India	37.6%	Sweden	36.2%

High Adoption

US	29.0%	Japan	25.3%
Canada	26.0%	Switzerland	22.3%
Norway	25.8%		

Moderate Adoption

Italy	21.1%	UK	19.1%
Indonesia	19.8%	Australia	18.8%
Netherlands	19.7%		

Slow to Adopt

Finland	17.9%	France	15.6%
Russia	17.2%	Argentina	14.5%
Spain	16.5%	Brazil	14.5%

Very Low Adoption

Germany	12.5%	Mexico	10.2%
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Note: ages 14+; mobile phone users who have made at least one proximity mobile payment transaction in the past six months; includes point-of-sale (POS) transactions made by using mobile devices as a payment method; excludes transactions made via tablet
Source: eMarketer, Sep 2019

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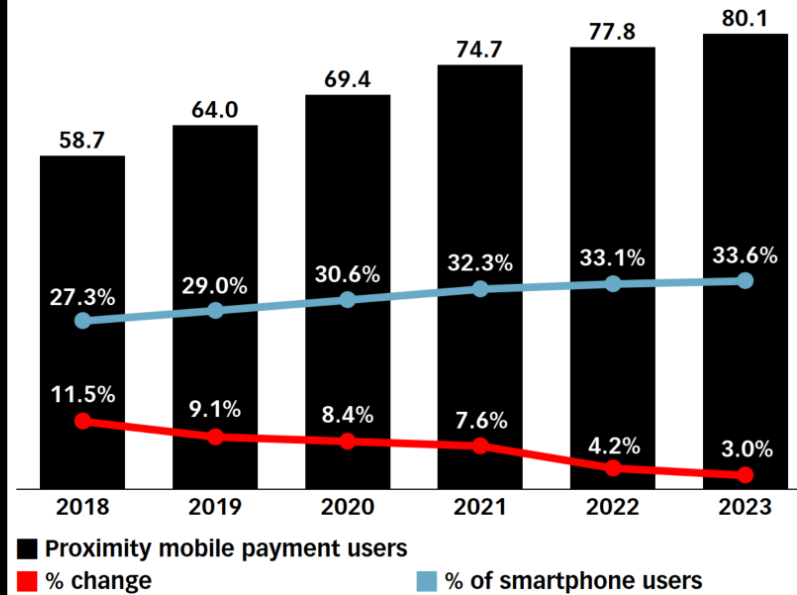
BY AGE

**TRANSACTION
VALUE**

TOP APPS

Proximity Mobile Payment Users in the US, 2018-2023

millions, % change and % of smartphone users



Note: ages 14+; mobile phone users who have made at least one proximity mobile payment transaction in the past six months; includes point-of-sale transactions made by using mobile devices as a payment method; excludes transactions made via tablet

Source: eMarketer, October 2019

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Proximity Mobile Payment Users in the US, by Age, 2019-2023

% of smartphone users in each group

	2019	2020	2021	2022	2023
14-17	13.7%	14.9%	15.8%	16.6%	17.2%
18-24	45.0%	47.0%	50.6%	52.5%	53.6%
25-34	48.4%	51.7%	54.7%	56.7%	58.2%
35-44	35.7%	38.7%	40.6%	40.8%	41.0%
45-54	21.3%	23.6%	25.2%	26.5%	27.2%
55-64	15.6%	16.4%	17.9%	18.3%	18.9%
65+	4.6%	4.7%	4.8%	4.8%	4.8%
Total	29.0%	30.6%	32.3%	33.1%	33.6%

Note: mobile phone users who have made at least one proximity mobile payment transaction in the past six months; includes point-of-sale transactions made by using mobile devices as a payment method; excludes transactions made via tablet

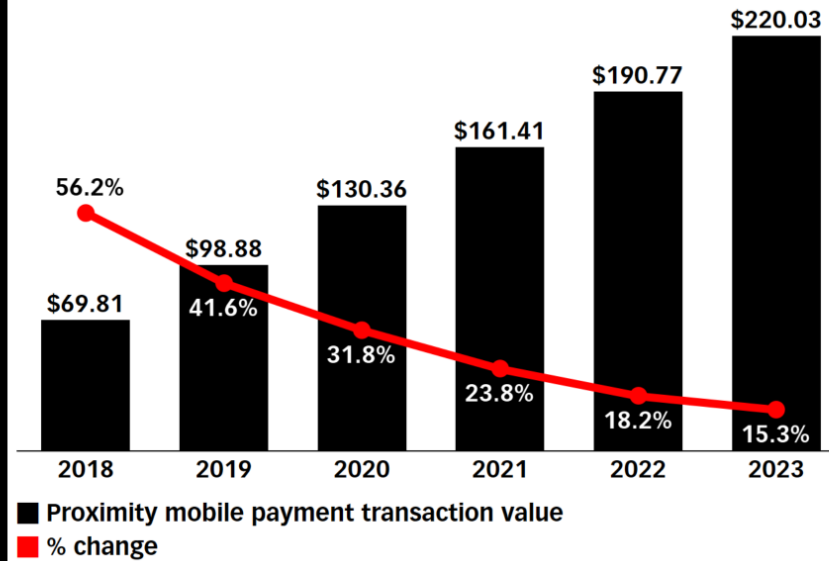
Source: eMarketer, October 2019

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Proximity Mobile Payment Transaction Value in the US, 2018-2023

billions and % change



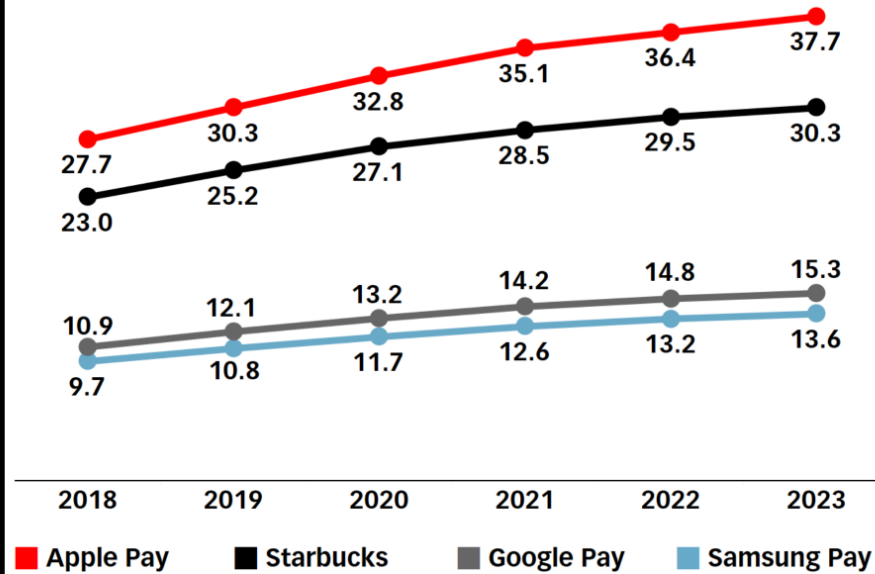
Note: includes point-of-sale (POS) transactions made by using a mobile device as a payment method; includes scanning, tapping or swiping a mobile device at the POS to complete transaction; excludes purchases of digital goods on mobile devices, purchases made remotely on mobile devices that are delivered later on, and transactions made via tablets
Source: eMarketer, October 2019

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Proximity Mobile Payment Users in the US, by Platform, 2018-2023

millions



Note: ages 14+; mobile phone users who have made at least one proximity mobile payment transaction in the past six months; includes point-of-sale transactions made by using mobile devices as a payment method; excludes transactions made via tablet

Source: eMarketer, October 2019

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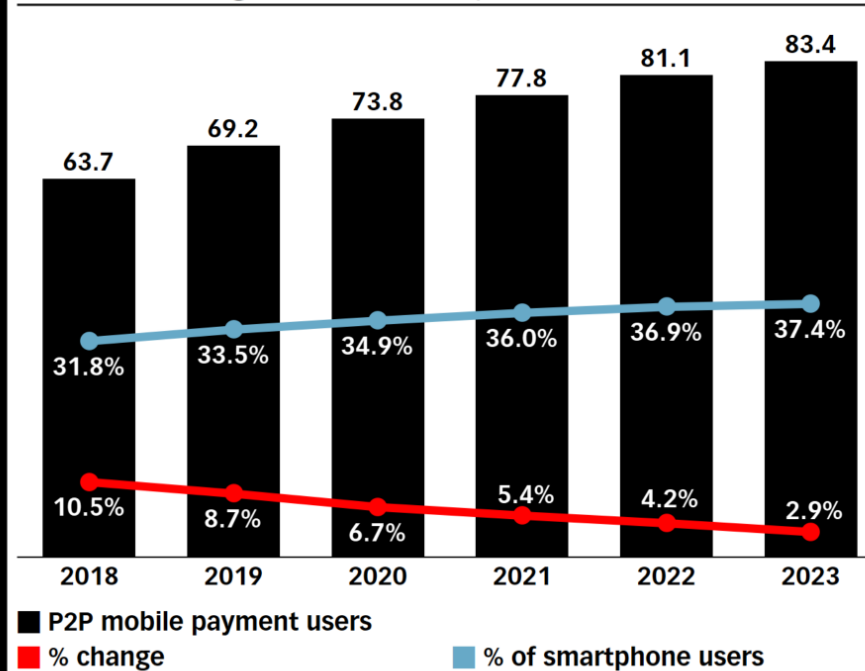
PEER-TO-PEER

**CONTACTLESS
CARDS**

SECURITY

P2P Mobile Payment Users in the US, 2018-2023

millions, % change and % of smartphone users



Note: ages 18+; mobile phone users who have made at least one peer-to-peer (P2P) transaction via a mobile phone in the past month

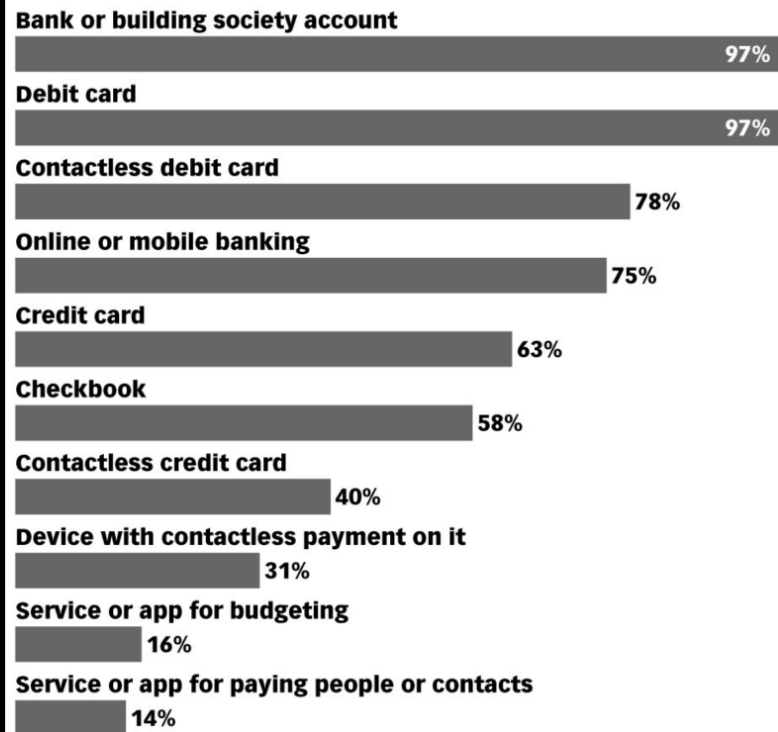
Source: eMarketer, October 2019

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What Financial Products Do UK Consumers Have?

% of respondents, Feb 2019



Note: ages 18+

Source: BritainThinks, "Access to cash research with consumers and small businesses" commissioned by Payment Systems Regulator (PSR), July 25, 2019

249060

www.eMarketer.com

Why Have Consumers in Germany Not Used Proximity Mobile Payment Methods?

% of respondents, Jan 2019

I have security concerns

60%

It is too complicated

28%

It takes too long

16%

I did not know mobile payments were possible

13%

The stores I shop with do not offer this payment method

6%

*Note: n=452 consumers ages 16+ who do not use mobile payments
Source: Bitkom Research, "Safer Internet Day 2019 – Verbraucher und
Digitales Bezahlen," Jan 29, 2019*

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