

Canadian Wireless Telecommunications Association

2012 National Cell Phone Recycling Study

January 2013

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RESEARCH OBJECTIVES

The overall objectives of this research were to:

- Follow up on how Canadians deal with unused cell phones.
- Understand which programs are being used by Canadians to recycle or donate their used phones.
- Understand why Canadians are storing their used cell phones.
- Gauge Canadians' awareness of cell phone recycling programs in general, and of the Recycle My Cell program in particular.
- Gauge awareness of Waste Reduction Week.
- Evaluate Canadians' likelihood of using a cell phone recycling program in the future.
- Understand what would motivate Canadians to recycle their used cell phones.

The results of this report are a follow-up study from the 2009, 2010, and 2011 surveys conducted by CWTA.

RESEARCH METHODOLOGY

- A total of 4,019 surveys were completed via a national independent survey, using CATI (Computer Assisted Telephone Interviewing) technology, following a random sampling procedure.
- Data collection for this study was conducted from November 19th to December 16th 2012.
- The data is weighted to replicate actual population distributions according to 2006 Census data.

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RESEARCH RESULTS

OWNERSHIP AND USAGE

- Over two thirds of adult Canadians own a cell phone (73%), whether for personal use (68%), or for both business and personal use (5%). Another 7% do not currently have a cell phone, but plan to have one in the future.
- Virtually all cell phone owners (93%) purchased a new phone as opposed to acquiring a second hand one. One of the main reasons for not purchasing a second hand phone is that potential phone buyers do not know obtaining a second-hand or refurbished phone is an option. On average, Canadians have used their current phone for 22 months (or about 2 years).
- Canadians have owned on average 3 cell phones prior to their current one. Their previous phone was used on average 30 months (2.5 years). Canadians under 55 years old have had more cell phones prior to their current one compared to older Canadians, while men have had more cell phones than women.
- The type of phones currently used is nearly evenly split between Smartphones and regular cell phones. Those more likely to have Smartphones include men, young Canadians, as well as those living in urban areas.

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USED CELL PHONES STATUS

- Two in five Canadians (41%) store their old handsets when new cell phones are obtained. Another 41% put their old cell phone to use one way or another:
 - ✓ 41% stored it away..... Storing old phone is less likely to happen in Ontario, while it is more likely to happen in Manitoba, Newfoundland, New Brunswick and Alberta. Those who previously had a Smartphone are more likely to say they keep it as a back up, compared to those who had a regular cell phone (25% vs. 16%).
- Another 41% put their old cell phone to use one way or another:
 - ✓ 19% gave it or sold it to a friend or relative..... Ontarians and Albertans are most likely to do this as are residents of urban areas. The younger respondents are the more likely they are to give or sell their old phone to a friend or relative. If respondents only owned their old phone for a few years, or if the old phone was a Smartphone, they are more likely to give or sell it to a friend or relative than if they owned the phone for longer, or if it was a regular cell phone.
 - ✓ 12% recycled it..... Canadians are more likely to recycle their phone after using it for at least 4 years. The older Canadians are the more likely they are to have recycled their used phones. Also, more likely to have recycled unused phones include residents of British Columbia and Nova Scotia, or those whose previous phone was a regular featured phone.
 - ✓ 7% returned it to a store or their cell phone company..... Quebecers, respondents over 55 years old, or who owned their previous phone for at least 4 years are more likely to return the used cell phone to a store or their cell phone company.
 - ✓ 3% donated it..... Residents of Ontario or British Columbia, urban residents, and respondents at least 55 years old are more likely to donate their old cell phone. Donations are mainly given to women's shelters.

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AWARENESS OF CELL PHONE RECYCLING AND RECYCLE MY CELL PROGRAM

- Half of Canadians (50%) are aware of recycling programs for cell phones. Awareness is particularly higher in provinces like Saskatchewan, Ontario, British Columbia and Nova Scotia, while lowest in New Brunswick and Quebec.
- Respondents who previously owned a regular cell phone are more likely to say they will recycle their phone in the future, compared to those whose previous phone was a Smartphone (74% vs. 63%).
- At 21%, recycling programs from cell phone companies that are partners of the Recycle My Cell program are the best known among those who say they are aware of programs in the first place.
- Although the Recycle My Cell brand is not top of mind for Canadians, 16% of all respondents recognize this program when directly prompted or asked about it. The current level of awareness represents a statistically significant shift in awareness for the program since 2009 (10%).
- Television, print (newspapers and magazines), and radio are the most common ways through which Canadians have heard about Recycle My Cell.

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CELL PHONE RECYCLING

RECYCLERS

- Satisfaction with Recycle My Cell is very high. The majority of users (95%) assigned a positive rating to their cell phone recycling experience, and 4 in 5 (81%) gave it the highest satisfaction rating possible.
- The most common approaches used for cell phone recycling are through:
 1. recycling program from a cell phone provider that is a partner of Recycle My Cell (85% drop it off, as opposed to using the mail-back option),
 2. retail stores' cell recycling programs,
 3. recycling depots, plants or centres (e.g. SARCAN)
 4. Municipal depots, and
 5. recycling programs at work or school, and the curbside recycling box.
- Use of recycling depots and recycling programs at work and / or school are becoming increasingly popular since 2009.
- Respondents who previously owned a regular cell phone are more likely to have recycled it compared to those who owned a Smartphone.

NON-RECYCLERS

- Over seven in ten Canadians (71%) who have a previous phone in storage say they would be willing to recycle or return their stored cell phone in the future. Interest in recycling their stored phones is highest among respondents in British Columbia while resistance seems a little higher in PEI, Nova Scotia, Quebec and Alberta.
- The main barrier for cell phone recycling is the lack of information among consumers. When asked why they have kept their phone in storage, 22% of respondents with phones in storage affirm they kept their phone because they did not know what else to do with it. When asked directly what would encourage them to recycle, one of the main responses is to know where and how they can recycle or return the phone (14%). Other motivations to recycle are environmental reasons (11%), while 9% would need to feel ready to dispose their phone, or be presented with an easy process (8%).
- Potential recyclers say information, environmental concerns, an easy or convenient recycling process, not needing the phone, or having someone who needs it would drive them to recycle their stored phone. Those who say they are not willing to recycle their phone are more likely to be convinced by a monetary incentive or rebate.

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2012 TRENDS

- When compared to previous results, in 2012 Canadians are significantly more likely to:
 - Have bought a new phone instead of a second-hand or refurbished because they upgraded to a Smartphone (4% vs. 3% in 2010 and 2% in 2009)
 - Have had more cell phones than in previous years (3.3 vs. 2.7 in 2009)
 - Have given or sold their old phone to someone other than family or friends (2% vs. less than 1% in previous years)
 - Be aware of Municipal government's recycling programs (9% vs. 5% in 2011)
 - Be aware of charity's recycling programs (8% vs. 3% in 2011)
 - Have heard of the Recycle My Cell program (15% vs. 12% in 2010 and 10% in 2009)
 - Have heard of the Recycle My Cell program through the mail or flyers (4% vs. 1% in 2011 and 2010)

Research Objectives and Methodology

Research Objectives

The overall objectives of this research were to:

- Follow up on how Canadians deal with unused cell phones.
- Understand which programs are being used by Canadians to recycle or donate their used phones.
- Understand why Canadians are storing their used cell phones.
- Gauge Canadians' awareness of cell phone recycling programs in general, and of the Recycle My Cell program in particular.
- Gauge awareness of Waste Reduction Week.
- Evaluate Canadians' likelihood of using a cell phone recycling program in the future.
- Understand what would motivate Canadians to recycle their used cell phones.

The CWTA is also interested in understanding how these data points track since the first wave of research was conducted in 2009.

Research Methodology

- Data collection was conducted via a national independent survey, using CATI (Computer Assisted Telephone Interviewing) technology from dialing facilities in Ottawa.
- Data collection for this study was conducted from November 19th to December 16th 2012.
- A total of 4,019 survey participants completed the 7-minute survey.
- The results of this report are a follow-up study from the 2009, 2010 and 2011 surveys conducted by CWTA. In order to compare results to previous surveys' results, we followed the same random sampling procedures. Similarly, age and gender quotas were established to ensure sample representation of the Canadian adult population, as well as provincial quotas, to ensure enough sample for analysis, and to ensure coverage within each province.
- All respondents were given the choice of conducting the survey in English or French.
- The data is weighted to replicate actual population distributions by province, age, and gender, within Canada according to 2006 Census data.
- Statistically significant differences across provincial or demographic groups are indicated with underlined numbers.

Research Methodology

- The provincial distribution of the interviews, along with their associated margins of error, are outlined to the right.
- It is important to note that the margins of error outlined in this section should be considered the maximum margins associated with affirmative responses of 50%. The margins of error will vary based on a variety of factors from question to question based on sample size and the actual percent to which the margin of error is being associated.
- It is also important to note that results associated with population sub-groups are based on smaller sample sizes and will therefore have a higher margin of error.

Province	Interviews Completed	Margin of Error
Newfoundland and Labrador	402	+/- 4.9%
Prince Edward Island	401	+/- 4.9%
Nova Scotia	401	+/- 4.9%
New Brunswick	402	+/- 4.9%
Quebec	400	+/- 4.9%
Ontario	400	+/- 4.9%
Manitoba	400	+/- 4.9%
Saskatchewan	407	+/- 4.9%
Alberta	402	+/- 4.9%
British Columbia	404	+/- 4.9%
Total	4,019	+/- 1.5%

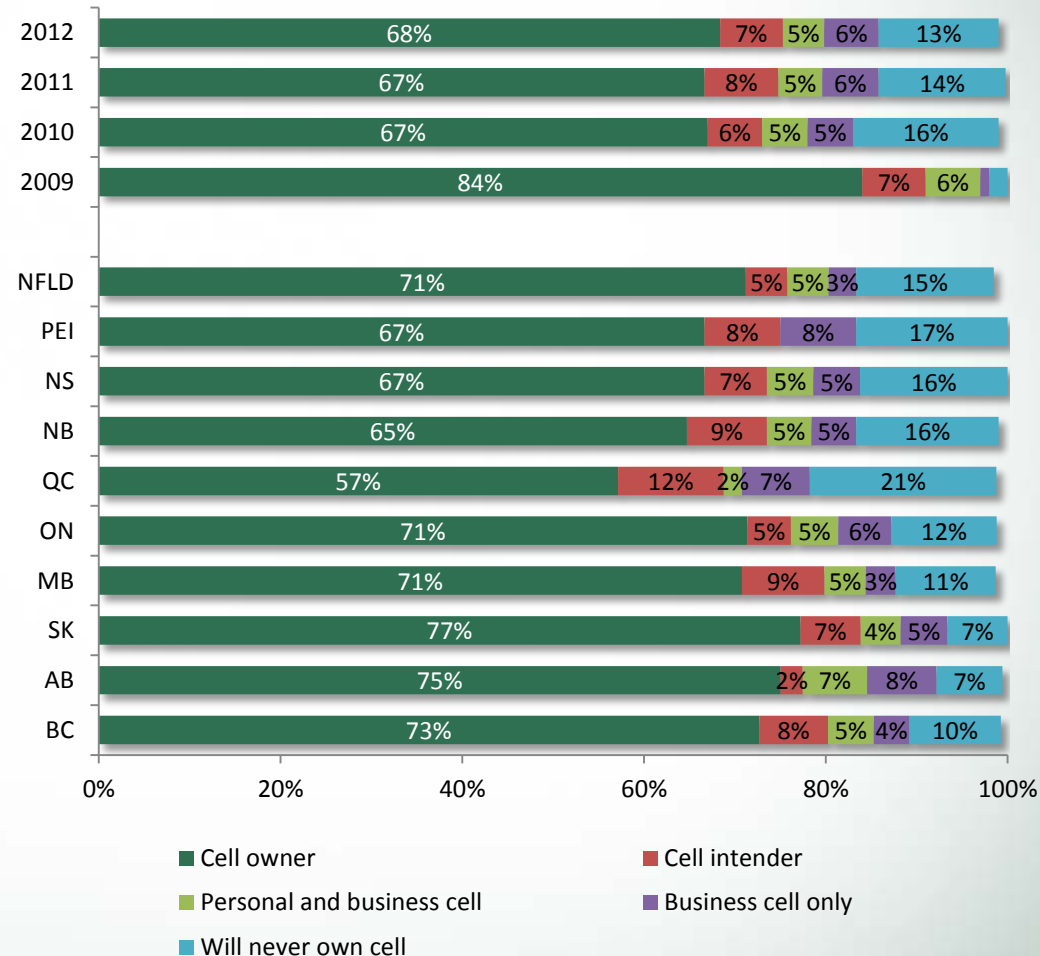
Detailed Findings

Cell Phone Ownership

Cell Phone Ownership Status

- by province

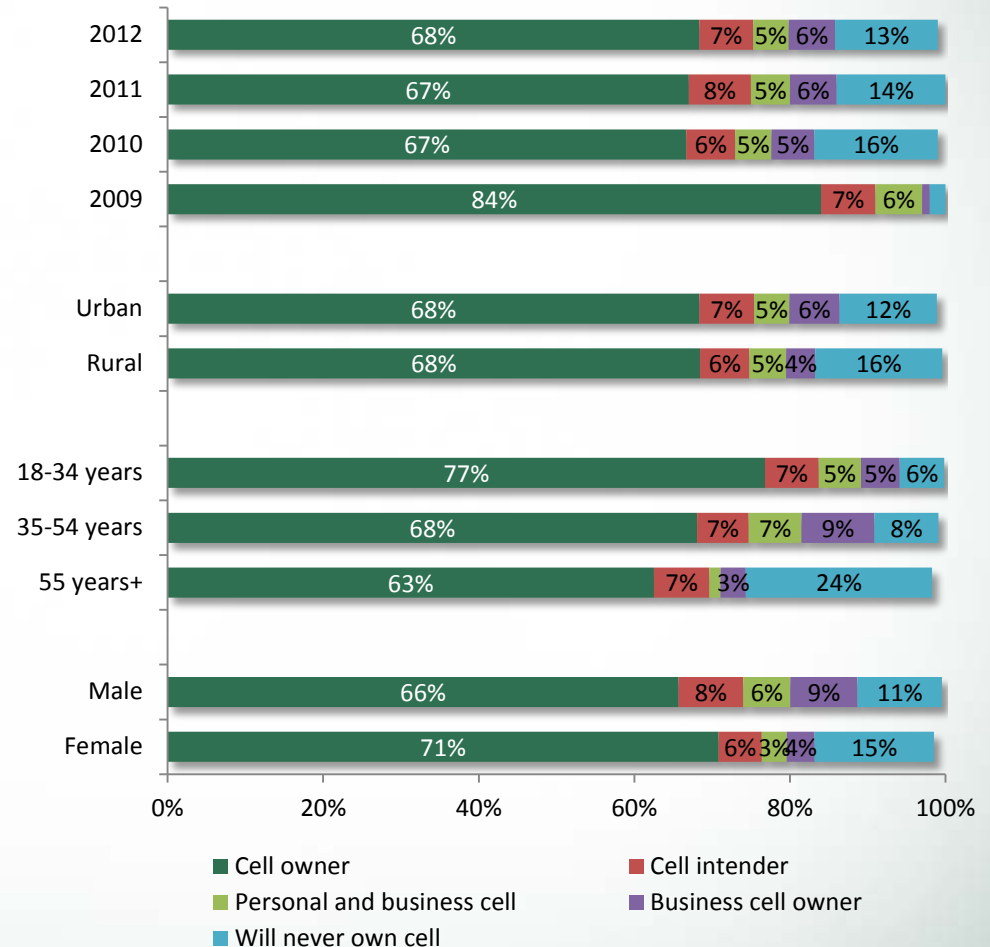
- As observed in previous years, over two thirds of adult Canadians own a cell phone, of which 68% are personal cell owners, and 5% have both a personal and a business cell phone.
- An additional 7% of respondents say they do not currently have a cell phone, but plan to have one in the future.
- Six percent of all respondents have a business cell phone only, while 13% say they do not have a cell phone and do not plan on getting one in the future.
- The lowest cell phone penetration is observed in Quebec where 57% report owning a cell phone. While most provinces in Atlantic Canada align with national numbers in terms of cell phone ownership, Newfoundland leads the way at 71%. Similar proportions are also observed in Ontario, Manitoba, and British Columbia. The country's highest levels of cell phone adoption can be found in Saskatchewan at 77%, and Alberta at 75%.



Cell Phone Ownership Status

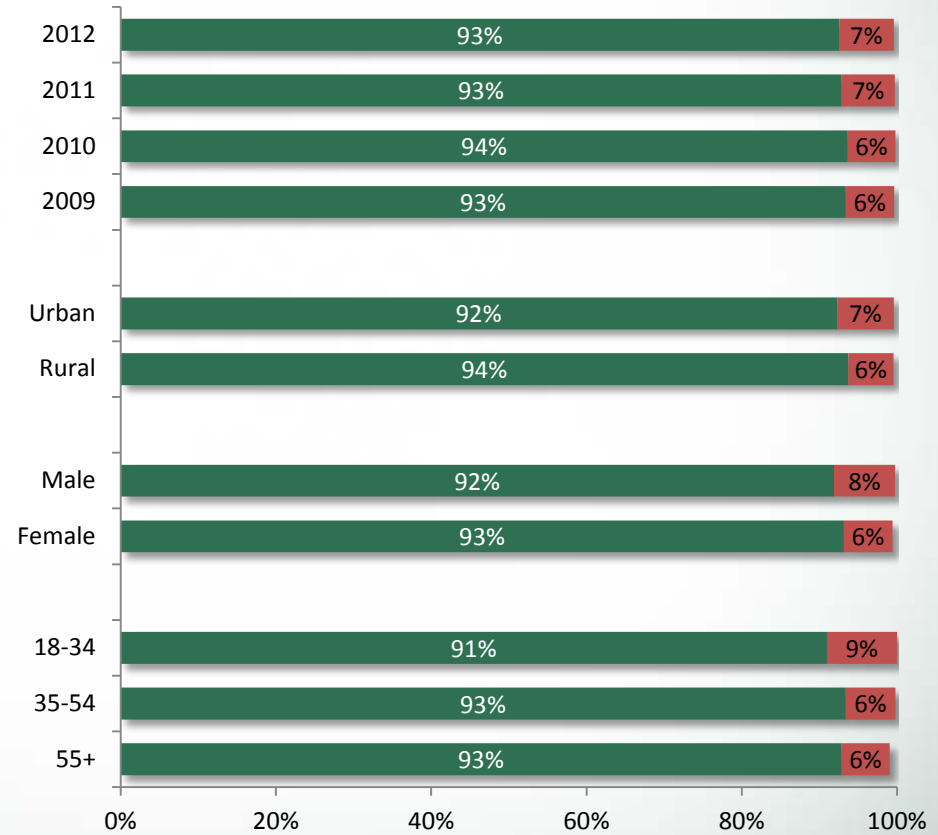
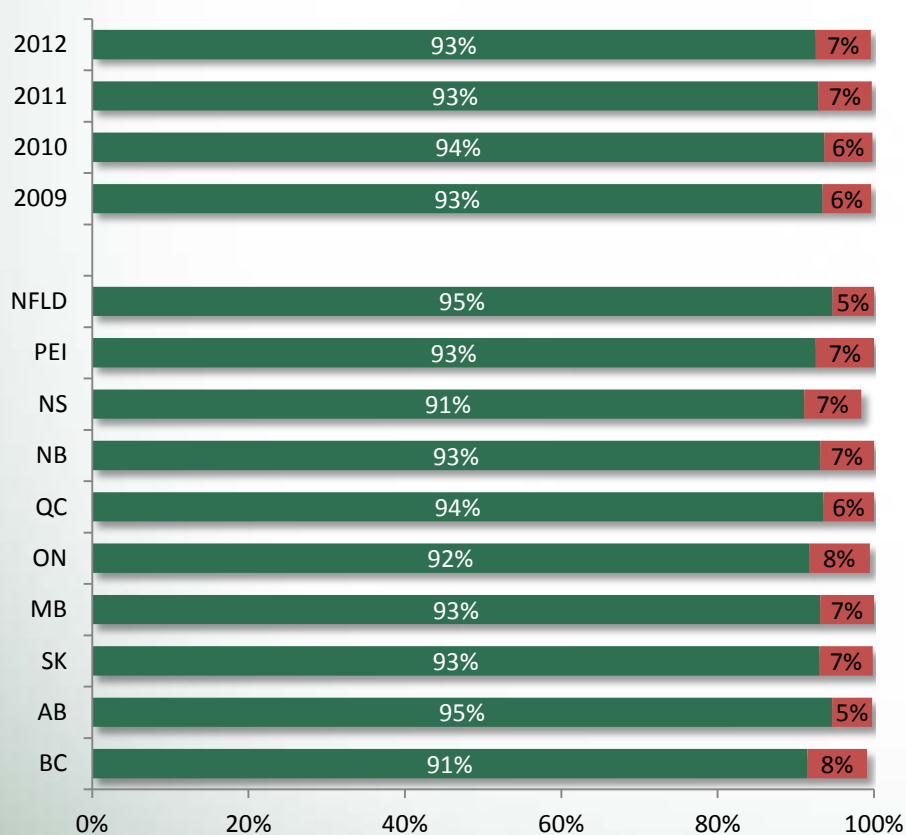
– by demographic

- Women are more likely than men to own cell phones (71% vs. 66%).
- However, men are more likely to have both employer-paid and personal cell phones (6% vs. 3%), and to have one exclusively provided by their employer (9% vs. 4%).
- Younger respondents are more likely to have a personal cell phone, while those over 55 years of age are the most likely to say they will never own a cell phone.

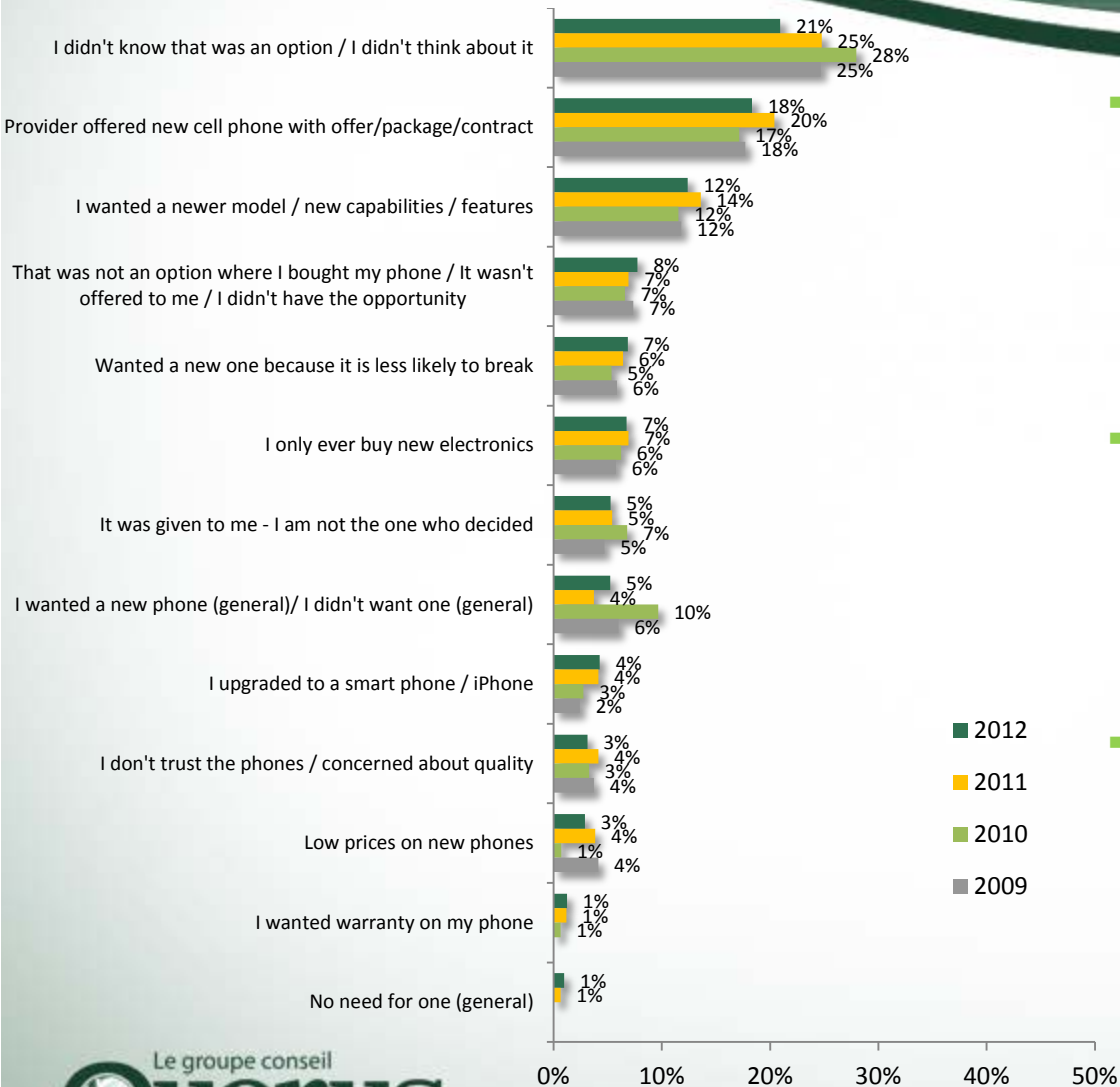


New vs. Second Hand Cell Phones

- Virtually all cell phone owners bought or received a new phone (93%), while only 7% say they bought it or received it second hand or refurbished. Results are consistent across all provinces and demographics.



Reasons for Not Purchasing Second Hand Phones



- Showing a decreasing trend over the years, just over one fifth of cell phone owners say that not knowing they could buy a second hand or refurbished phone is the reason why they did not buy one (21%). Another fifth (18%) say their cell phone service provider offered a new cell phone with their contract.
- Many intentionally purchase new phones for various reasons: Wanting a newer model or new capabilities and features (12%), only buying new electronics (7%), simply wanting a new phone (5%), upgrading to a Smartphone / iPhone (4%), new phones being less likely to break (7%), or not trusting refurbished phones (3%).
- In fact, Smartphone owners are more likely than regular cell phone owners to say they did not buy a second hand or refurbished phone because the provider offered the new phone with the contract (21% vs. 15%), or that they wanted a new model, capabilities or features (16% vs. 8%).

Reasons for Not Purchasing Second Hand Phones

– by province

- Ontario, Manitoba, Saskatchewan, Alberta, and British Columbia residents are more likely than Newfoundland residents to say they did not buy a used phone because providers offered a new phone with a contract.
- Newfoundland, Prince Edward Island, and New Brunswick residents are the most likely to say they did not buy a used phone because they wanted a newer model or new features.
- Quebec residents are the most likely to say they did not obtain a second hand or refurbished phone because that was not an option where they bought their phone, or because they only buy new electronics.
- Ontario residents are the most likely to say they did not buy a used phone because new ones are less likely to break.
- New Brunswick residents are the most likely to say they did not buy a second hand or refurbished phone because they wanted a new phone or just did not want a used one.

TOP 8 RESPONSES	Total	Province									
		NFLD	PEI	NS	NB	QC	ON	MB	SK	AB	BC
I didn't know it was an option / I didn't think about it	21%	24%	24%	<u>25%</u>	21%	24%	19%	20%	23%	19%	23%
The provider offered new phone with contract	18%	11%	16%	15%	15%	15%	<u>20%</u>	<u>18%</u>	<u>20%</u>	<u>20%</u>	<u>20%</u>
I wanted a newer model / new features	12%	<u>18%</u>	<u>24%</u>	13%	<u>18%</u>	10%	12%	11%	<u>16%</u>	<u>16%</u>	11%
Not an option where I bought my phone / no offer / no opportunity	8%	5%	3%	5%	5%	<u>11%</u>	8%	7%	6%	6%	5%
Wanted a new one because it is less likely to break	7%	6%	4%	7%	3%	4%	<u>10%</u>	7%	5%	6%	5%
I only ever buy new electronics	7%	5%	3%	3%	2%	<u>13%</u>	5%	<u>6%</u>	<u>6%</u>	5%	5%
It was given to me	5%	6%	4%	4%	4%	6%	5%	6%	3%	4%	6%
I wanted a new phone / I didn't want one (general)	5%	7%	7%	7%	<u>9%</u>	4%	6%	5%	4%	4%	6%

Note: Significantly different numbers are underlined

Reasons for Not Purchasing Second Hand Phones

– by demographic

- Respondents living in rural areas are more likely to say they did not know purchasing a second hand or refurbished phone was an option, compared to those living in urban areas.
- Older Canadians are more likely to say they did not know purchasing a second hand or refurbished phone was an option, that they only buy new electronics, or that it was given to them. Conversely, younger Canadians are more likely to say that their provider offered the new phone with the contract.
- Men are more likely than women to say they wanted a newer phone or new features, while women are more likely to have new phones because it was given to them.

TOP 8 RESPONSES	Total	Region		Age			Gender	
		Urban	Rural	18-34	35-54	55+	M	F
I didn't know it was an option / I didn't think about it	21%	20%	<u>26%</u>	17%	19%	<u>26%</u>	20%	22%
The provider offered new phone with contract	18%	19%	17%	<u>22%</u>	<u>20%</u>	14%	18%	18%
I wanted a newer model / new features	12%	13%	10%	14%	14%	10%	<u>15%</u>	10%
Not an option where I bought my phone / no offer / no opportunity	8%	8%	6%	9%	7%	8%	9%	7%
Wanted a new one because it is less likely to break	7%	7%	5%	7%	6%	8%	6%	8%
I only ever buy new electronics	7%	7%	6%	4%	6%	<u>9%</u>	7%	7%
It was given to me	5%	6%	4%	4%	4%	<u>8%</u>	3%	<u>7%</u>
I wanted a new phone / I didn't want one (general)	5%	6%	4%	5%	6%	5%	5%	5%

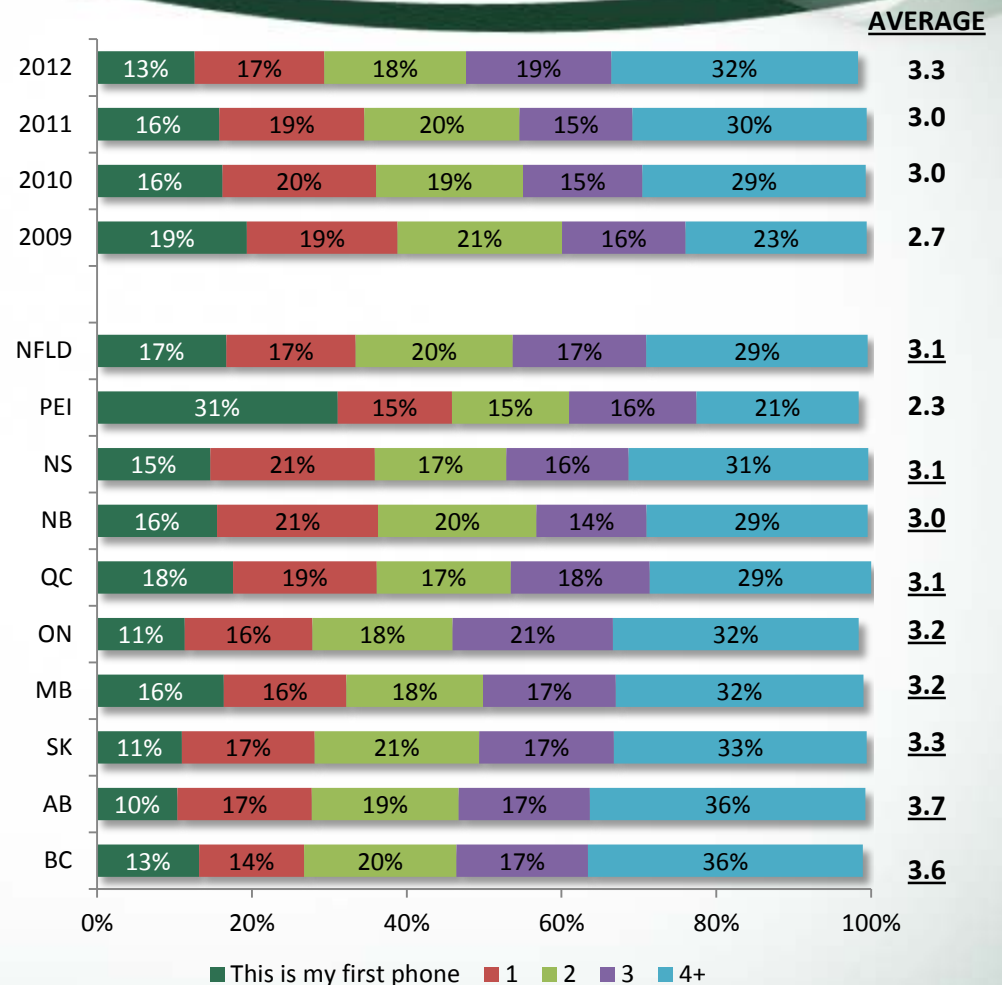
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Prior Cell Phone Ownership

– by province

- Canadians have owned on average 3 cell phones prior to their current one. The average usage of the previous phone is 30 months (2.5 years), while the average usage of the current phone is 22 months (about 2 years).
- PEI residents are the most likely to say their current phone is their first one (32%).
- Nova Scotia and New Brunswick residents are the most likely to say they have owned one phone (21% respectively), while Ontarians are the most likely to say they have owned 3 phones (21%), and Alberta and British Columbia residents are the most likely to say they have owned at least 4 phones previously (36% each).
- Experience with cell phones is highest in Alberta and British Columbia, where an average of four phones have previously been owned.

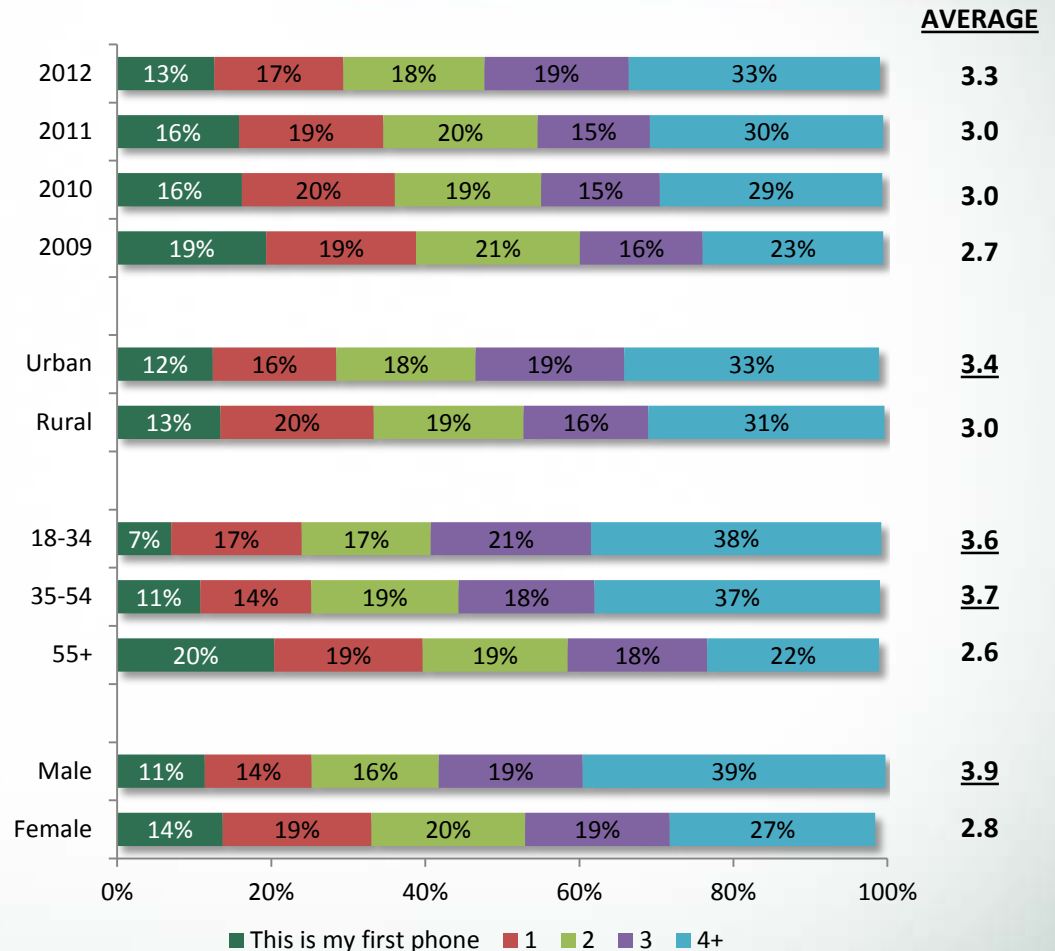
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Prior Cell Phone Ownership

– by demographic

- The average number of phones previously owned by residents of urban areas is higher than the average reported for residents of rural areas.
- Older Canadians are more likely to say this is their first phone (20%), or they have had only one prior to their current phone (19%). Their average number of previous phones is significantly lower than younger Canadians (2.6 vs. 3.7).
- Men are more likely to say they have had at least 4 phones before their current one, compared to women (39% vs. 27%). On average, men have previously owned 3.9 phones compared to 2.8 for women.
- Smartphone owners are more likely to have owned at least 4 phones compared to regular cell phone owners (46% vs. 17%).



Note: Significantly different numbers are underlined

Cell Phone Usage

– by province and demographic

- Canadians at least 55 years of age used their previous cell phone nearly half a year more than those 18 to 34. Older Canadians used their phone for about 3 years, compared to just over 2 years among 18 to 34 year olds and 2.5 years among those in the middle age group. Given how long they have been using their current phones, it seems this trend will likely persist in the near term. Not coincidentally, this turnover rate likely aligns with contract renewal timeframes.
- Women also seem to have used their current phone longer than men (roughly 24 months compared to 21 months among men).
- Residents of Nova Scotia and Ontario tend to have used their prior phone longer than other provinces (roughly 2.5 years), while Quebec, Manitoba, and New Brunswick residents are showing longer ownership periods for their current phones (approximately 2 years).

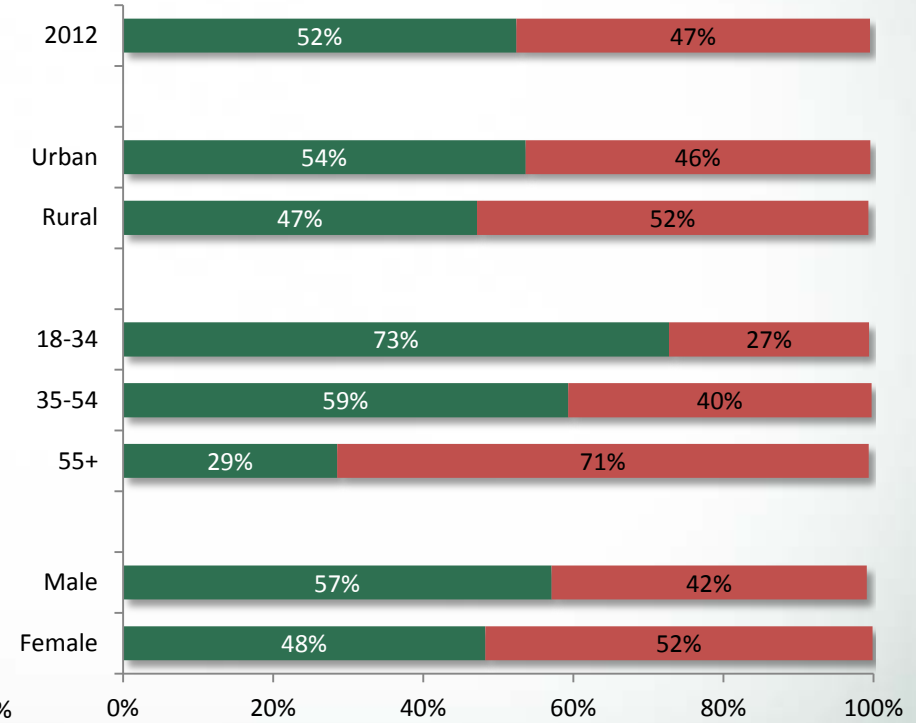
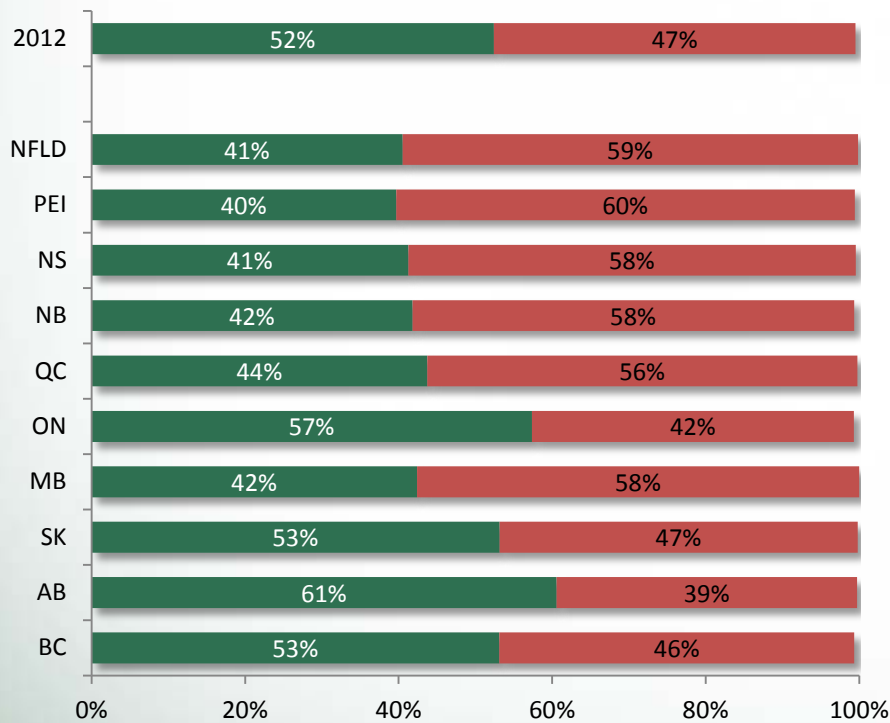
OWNERSHIP: AVERAGE IN MONTHS	Total	Province									
		NFLD	PEI	NS	NB	QC	ON	MB	SK	AB	BC
Prior cell phone	29.8	26.7	30.1	<u>31.5</u>	30.2	28.9	<u>32.1</u>	27.8	27.2	27.5	27.6
Current cell phone	22.5	21.7	19.9	20.9	<u>23.5</u>	<u>27.2</u>	21.4	<u>25.4</u>	20.4	19.1	21.7

OWNERSHIP: AVERAGE IN MONTHS	Total	Region		Age			Gender	
		Urban	Rural	18-34	35-54	55+	M	F
Prior cell phone	29.8	29.6	31.0	26.5	<u>29.0</u>	<u>34.3</u>	28.9	30.7
Current cell phone	22.5	22.5	22.8	16.4	<u>19.9</u>	<u>30.8</u>	21.2	<u>23.7</u>

Note: Significantly different numbers are underlined

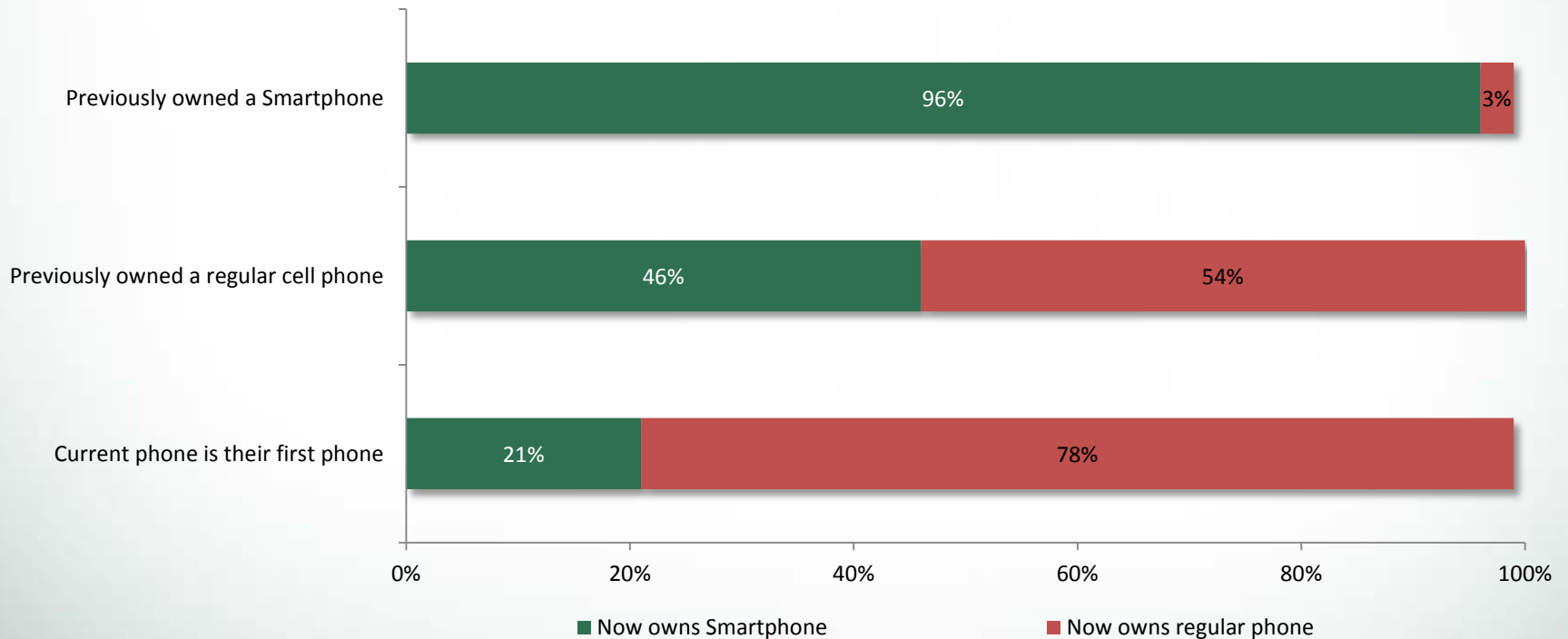
Type of Cell Phones Owned

- Over half of Canadians with a cell phone report having a Smartphone (52%), while the other half have a regular phone (47%).
- Residents of Ontario, Saskatchewan, Alberta and British Columbia are more likely to have a Smartphone than residents of other provinces. Men are more likely than women to have Smartphones (57% vs. 48%), as well as those living in urban areas (54% vs. 46% in rural areas). The younger Canadians are, the more likely they are to have a Smartphone rather than a regular feature cell phone (73% vs. 29%).



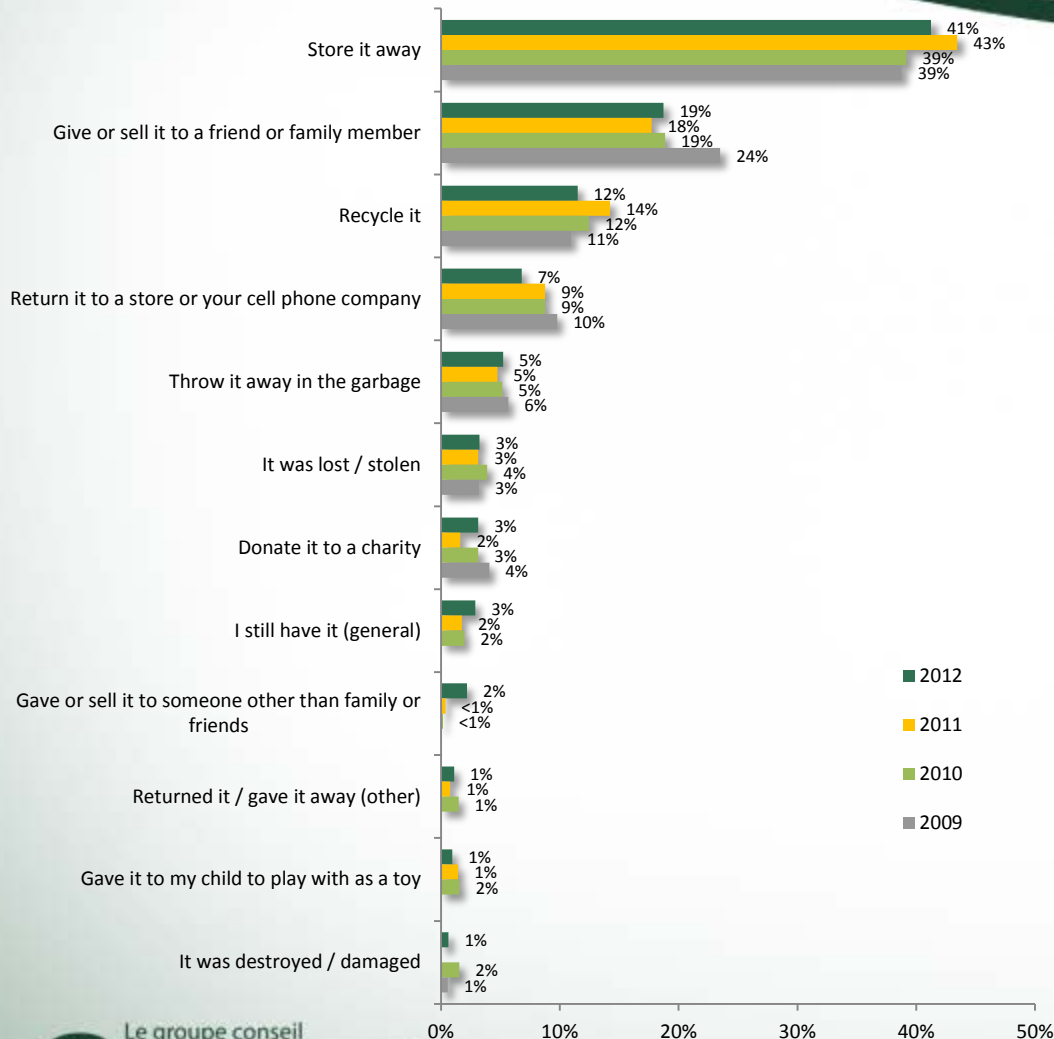
Change in Type of Phone

- Virtually all respondents who previously owned a Smartphone continue to have this type of phone (96%). Among those whose previous phone was a regular phone, nearly half have upgraded to a Smartphone (46%). Over one fifth (21%) of those new to owning a cell phone have a Smartphone, while over three quarters have a regular phone (78%).



Cell Phone Disposal Method

Previous Cell Phone: Storage vs. Disposal



- Two in five Canadians (41%) have stored their old cell phones since obtaining their newest phone. The remaining three in five say they have disposed their old phone in several other ways:
 - One in five report giving or selling their old cell phone to family, friends or other people (21%).
 - Nearly one in ten say they recycled it (12%), or returned it to a store or their cell phone company (7%).
- Over six in ten Canadians (63%) who stored away their old cell phones are unaware of cell phone recycling programs.
- Results are generally similar compared to those reported in previous years.

Previous Cell Phone: Storage vs. Disposal

– by province

- Storing previous cell phones is least likely to happen among Ontario residents.
- Ontario and Alberta residents are the most likely to have given or sold their old phone to a family member or friend, while Ontario and British Columbia residents are most likely to have donated it.
- While British Columbia and Nova Scotia residents are the most likely to say they recycled their old phone, Quebec residents are the most likely to say they returned it to a store or their cell phone company. Newfoundland, British Columbia, and Nova Scotia residents are the most likely to say they have thrown it away in the garbage. Manitoba, Quebec, and British Columbia residents are most likely to say their old phone was lost or stolen.

After receiving your current cell phone, what did you do with your old one? Did you...	Total	Province									
		NFLD	PEI	NS	NB	QC	ON	MB	SK	AB	BC
Store it away	41%	<u>48%</u>	45%	40%	<u>47%</u>	43%	37%	<u>49%</u>	42%	<u>46%</u>	41%
Give or sell it to a family member or friend	19%	16%	17%	18%	14%	17%	<u>21%</u>	13%	17%	<u>21%</u>	14%
Recycle it	12%	7%	9%	<u>13%</u>	8%	11%	12%	11%	11%	11%	<u>13%</u>
Return it to a store or your cell phone company	7%	5%	9%	7%	8%	<u>10%</u>	5%	5%	7%	7%	8%
Throw it away in the garbage	5%	<u>9%</u>	6%	<u>7%</u>	7%	5%	5%	4%	5%	3%	<u>8%</u>
Lost / stolen	3%	2%	2%	3%	3%	<u>4%</u>	3%	<u>5%</u>	3%	1%	<u>4%</u>
Donate it	3%	1%	2%	2%	3%	1%	<u>5%</u>	1%	3%	2%	<u>3%</u>

Note: Significantly different numbers are underlined

Previous Cell Phone: Storage vs. Disposal

– by demographic

- The message of recycling used phones continues to resonate among older Canadians, who are twice as likely to either recycle their used phone (15%), return it to a store or their cell phone company (10%), or donate it (4%), when compared to those 18 to 34 years old. Older Canadians are also more likely to say their old phone was lost or stolen, compared to younger Canadians.
- Residents of rural areas are more likely than residents of urban areas to store their old phones (48% vs. 40%). The latter are more likely to give it or sell it to a family member or friend. Young Canadians are also more likely to give or sell their old phone to a family member or friend.

After receiving your current cell phone, what did you do with your old one? Did you...	Total	Region		Age			Gender	
		Urban	Rural	18-34	35-54	55+	M	F
Store it away	41%	40%	<u>48%</u>	41%	43%	38%	43%	40%
Give or sell it to a family member or friend	19%	<u>20%</u>	14%	<u>24%</u>	<u>19%</u>	13%	19%	19%
Recycle it	12%	11%	12%	8%	<u>12%</u>	<u>15%</u>	12%	11%
Return it to a store or your cell phone company	7%	6%	7%	5%	6%	<u>10%</u>	7%	6%
Throw it away in the garbage	5%	5%	5%	6%	4%	5%	5%	5%
Lost / stolen	3%	3%	4%	2%	2%	<u>5%</u>	3%	4%
Donate it	3%	<u>4%</u>	1%	2%	3%	<u>4%</u>	3%	3%

Note: Significantly different numbers are underlined

Previous Cell Phone: Storage vs. Disposal

- by length of ownership

- Similar to previous years, what Canadian cell phone users do with their previous phone seems closely linked to the value they feel their previous phone may have.
- Relatively newer phones (i.e. the users owned the phone for less than 3 years) are more likely to be passed on to friends or family. Older phones become more eligible for recycling, or to be returned to a store or the cell phone company. Finally, phones that were owned for less than a year are more likely to have been thrown in the garbage, lost or stolen. We can only hypothesize that those who owned their phone for under a year and threw it in the garbage may not have been using a new phone but rather second hand one.

After receiving your current cell phone, what did you do with your old one? Did you...	Length of Previous Phone Ownership				
	0-1 year	1-2 years	2-3 years	3-4 years	4 or more years
Store it away	35%	<u>44%</u>	<u>45%</u>	<u>59%</u>	39%
Give or sell it to a family member or friend	<u>19%</u>	<u>24%</u>	<u>21%</u>	9%	14%
Recycle it	13%	8%	8%	12%	<u>18%</u>
Return it to a store or your cell phone company	7%	4%	6%	7%	<u>10%</u>
Throw it away in the garbage	<u>7%</u>	5%	3%	2%	6%
Lost / stolen	<u>5%</u>	2%	<u>2%</u>	<1%	<u>4%</u>
Donate it	<u>4%</u>	<1%	<u>4%</u>	3%	2%

Note: Significantly different numbers are underlined

Previous Cell Phone: Storage vs. Disposal

- by type of phone

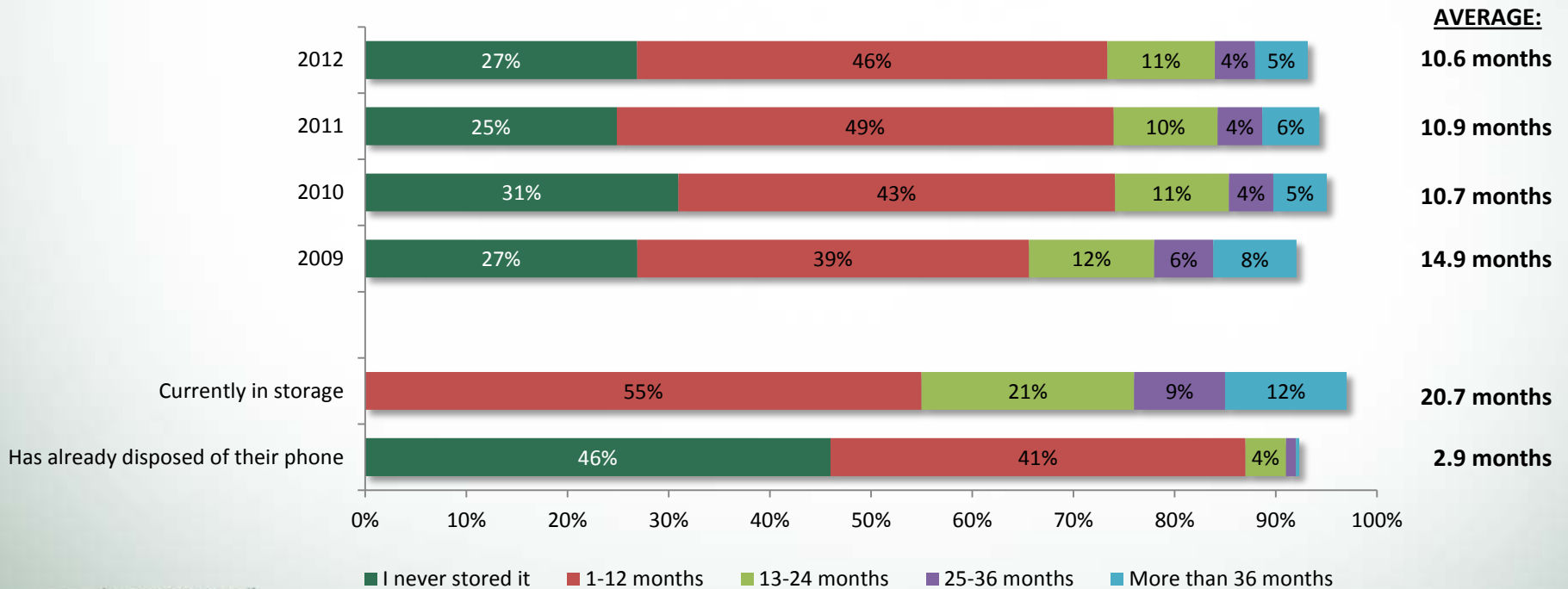
- The type of phone previously owned seems to play a role in that phone's fate. Those who previously owned a Smartphone see more value in their phones and are more likely to give or sell it to either family members or friends (27%) or strangers (5%), or to keep it (5%), compared to those who had a regular phone. The latter are more likely to recycle it.

After receiving your current cell phone, what did you do with your old one? Did you...	Type of Phone Previously Owned	
	Smartphone	Regular
Store it away	38%	42%
Give or sell it to a family member or friend	<u>27%</u>	16%
Recycle it	6%	<u>13%</u>
Return it to a store or your cell phone company	5%	7%
Throw it away in the garbage	5%	5%
Lost / stolen	3%	3%
Donate it	2%	3%
Still have it (general)	<u>5%</u>	2%
Give or sell it to someone other than family or friend	<u>5%</u>	1%

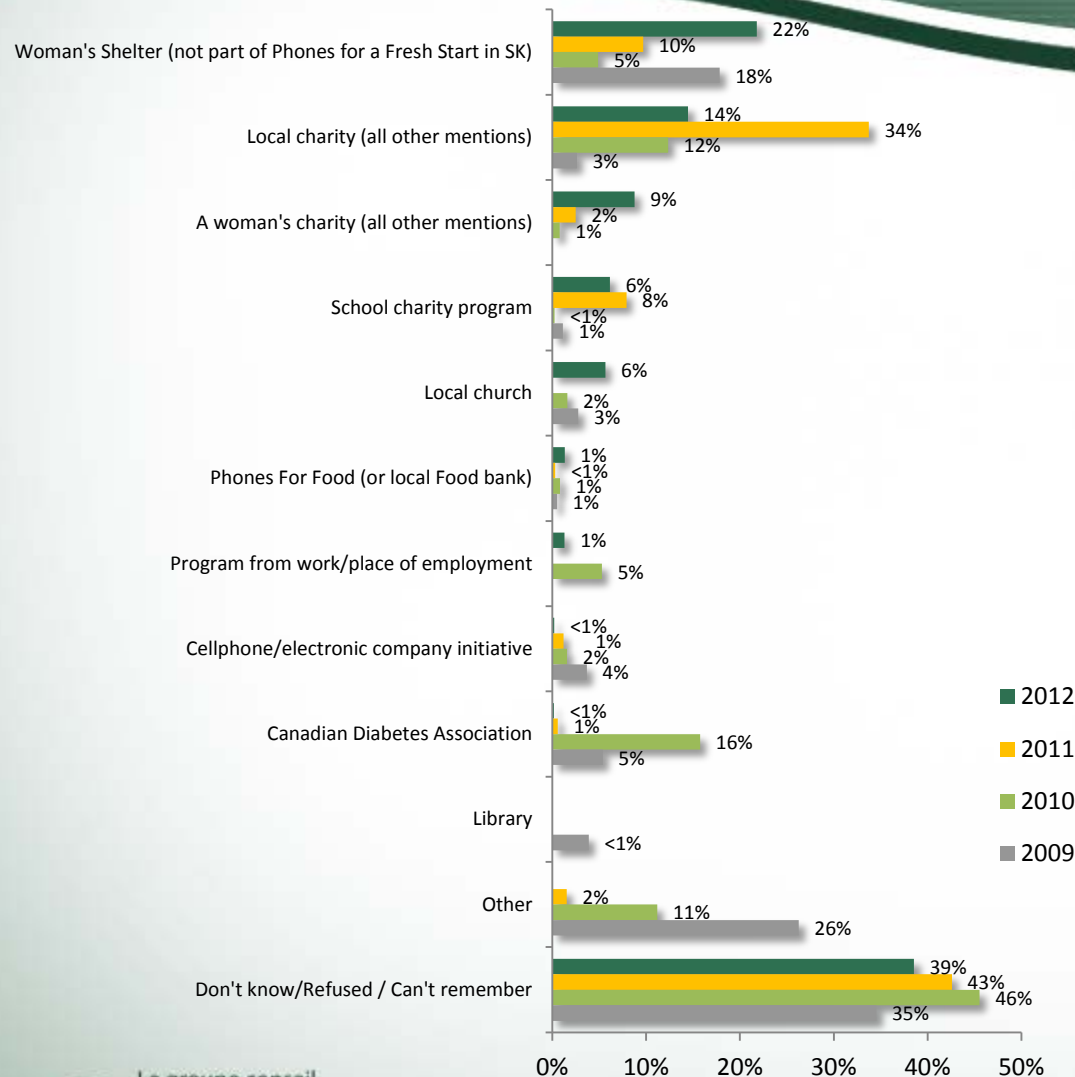
Note: Significantly different numbers are underlined

Storage Period

- Similar to previous years, the average time people have stored their old cell phones is close to 11 months. Among the 41% of cell phone owners who currently have their previous cell phone in storage, it has been there, on average, for 21 months, while those who disposed of their old phone only stored it for an average of 3 months.
- Respondents who previously owned a regular phone are more likely to say they have stored their phone for a longer period of time, compared to those whose previous phone was a Smartphone (12 vs. 7 months).



Donation Programs Used

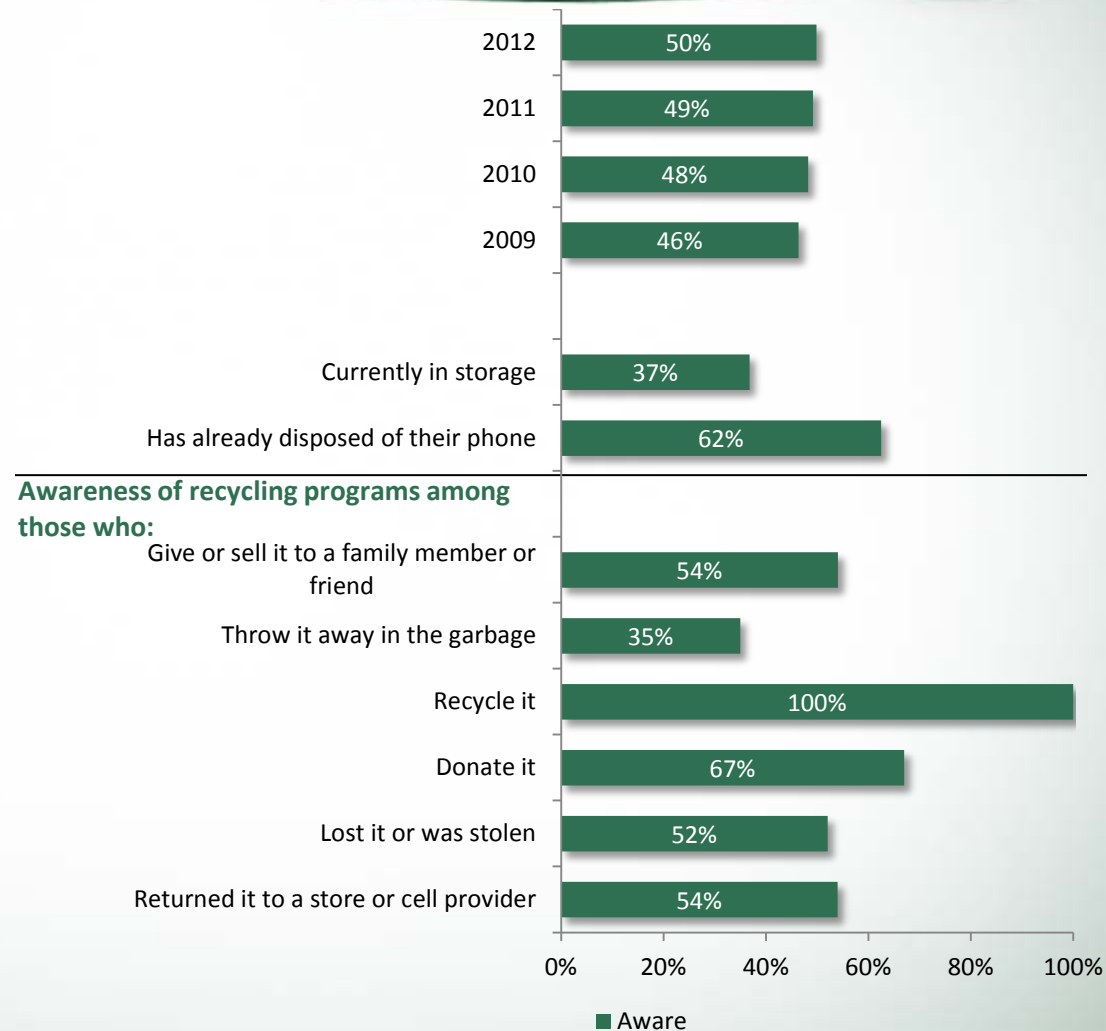


- The most common approach for cell phone donation is through a women's shelter (22%), followed by a local charity (14%), a woman's charity (9%), a school charity program (6%), or a local church (6%).
- Many cannot remember the charity they used.
- Given the small sample size (n=73), this data is not analyzed by province or by any of the demographic variables as it may not be representative of the population. Small sample sizes from year to year also explain the variations in the results with previous years.

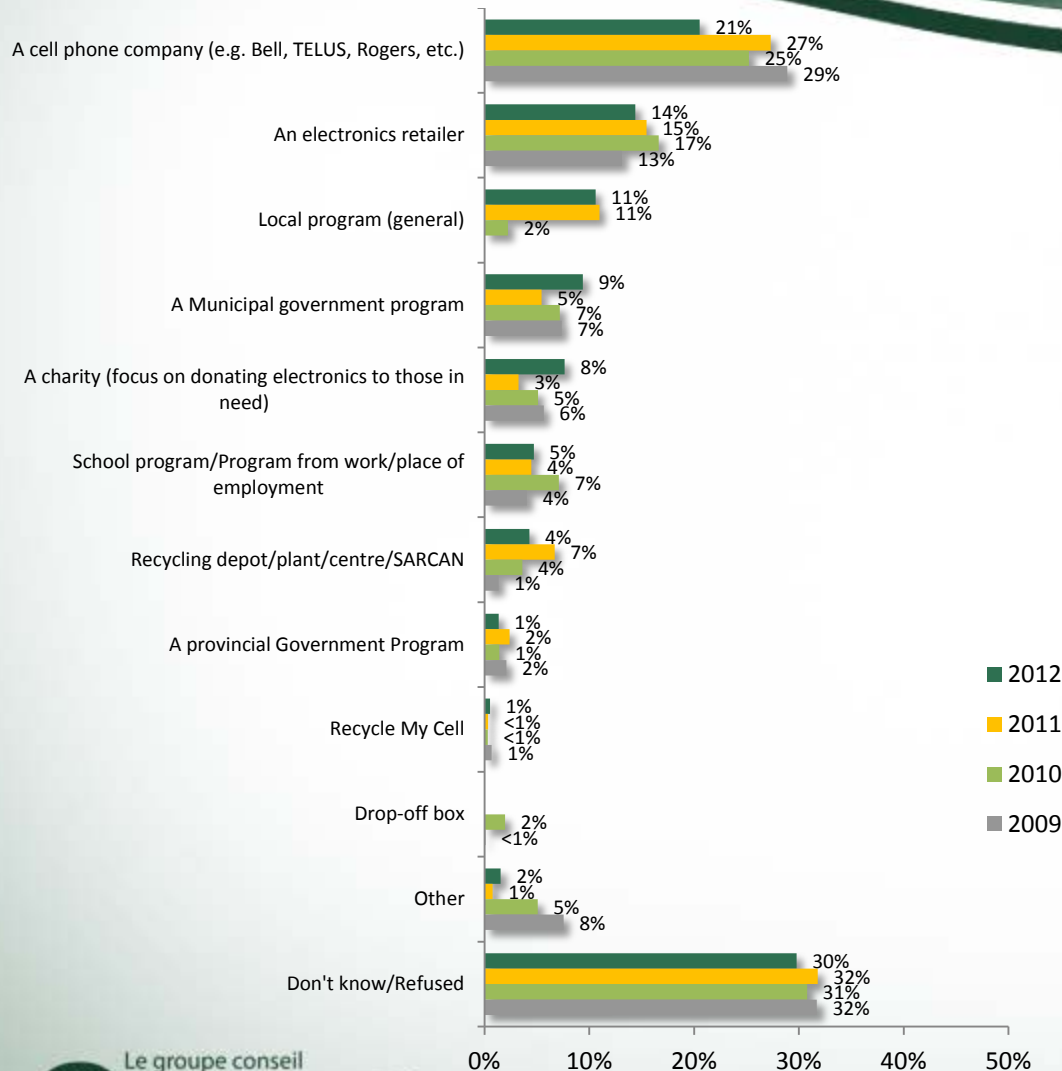
Awareness of Cell Phone Recycling

General Awareness of Recycling Programs

- Awareness of recycling programs for unused cell phones has steadily increased since 2009. Generally, half of respondents are aware of recycling programs for unused phones.
- Across the provinces, awareness is particularly low among respondents in New Brunswick (41%) and Quebec (35%).
- Among those who currently have their phone in storage, 37% say they are aware of recycling programs for cell phones. Awareness is higher among those who have already disposed of their phone (62%).
- Even though one third of those who threw their phones in the garbage are also aware of recycling programs, it should be noted that awareness of the programs may have occurred *after* they threw their phones away.



Unaided Awareness of Specific Programs

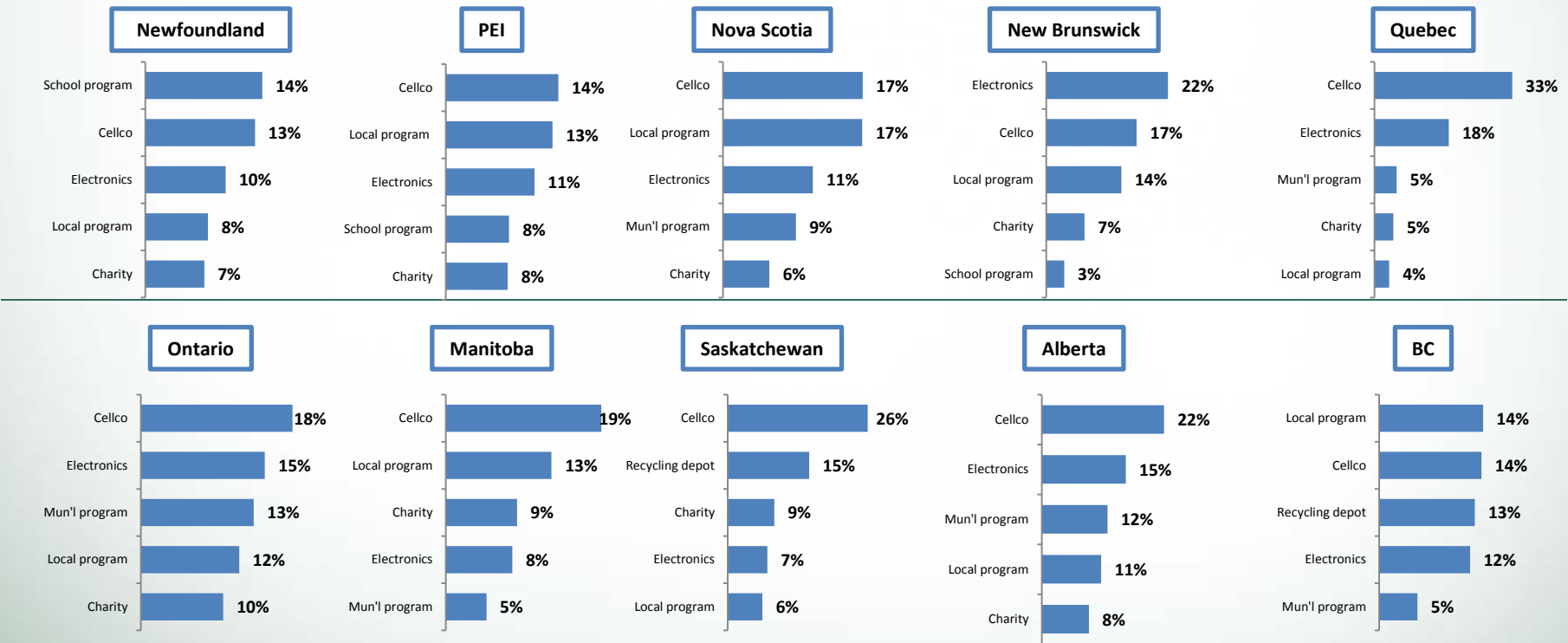


- Unaided awareness of Recycle My Cell is not high (1%). The RMC brand has not really garnered any momentum since the 2009 survey. However, one fifth of respondents aware of recycling programs (21%) recognize Recycle My Cell partners carrying a recycling program.
- Other important mentions are electronics retailers (14%), local programs (11%), Municipal government programs (9%), and charities that focus on donating electronics to those in need (8%).
- Nearly one third of respondents who say they are aware of recycling programs could not name a specific one.

Unaided Awareness of Specific Programs

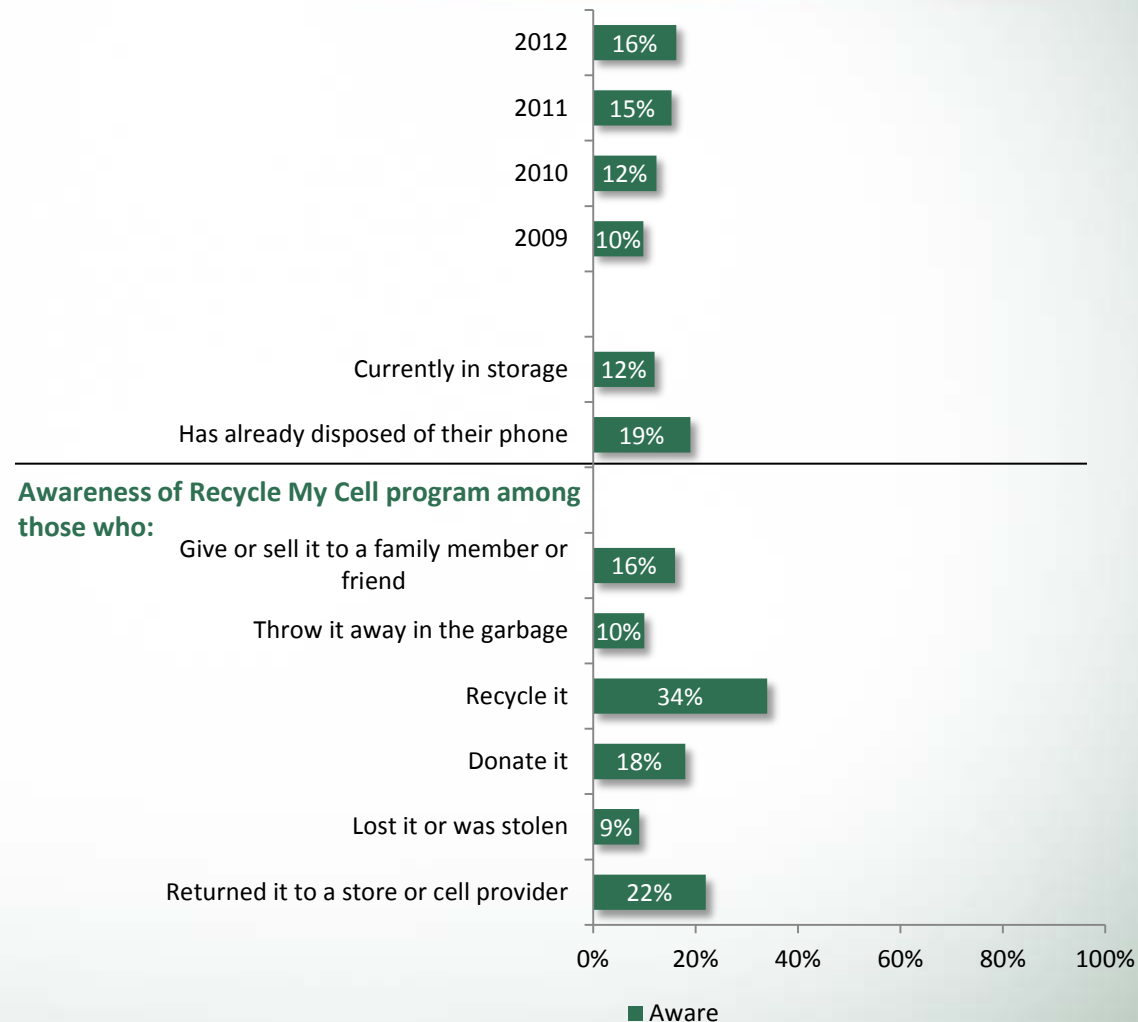
- by province

- Awareness of the various programs differs from province to province. Cell phone companies are well known everywhere, especially in Quebec and Saskatchewan. Electronic retailers are well known in New Brunswick. Municipal government programs are well known in Ontario and Alberta. Work or school programs are well known in Newfoundland, and recycle depots are especially known in Saskatchewan (SARCAN) and British Columbia. Provincial government programs are more likely to be known in Prince Edward Island and Saskatchewan.



Awareness of Recycle My Cell Program

- National awareness of the Recycle My Cell program is at 16% - this metric is a combination of unprompted and aided questions. The current level of awareness represents a statistically significant shift in awareness for the program since 2009 and 2010.
- Recycle My Cell awareness is highest in Newfoundland (26%), and is lowest in New Brunswick and British Columbia (12% and 11% respectively).
- Older Canadians (55+) are more likely to be aware of the Recycle My Cell program, compared to those 18 to 34 years old (19% vs. 13%).
- Among those who currently have their phone in storage, 12% are aware of the Recycle My Cell program. As well, 19% of those who have already disposed of their phone are aware of RMC.
- One third of those who recycled their previous phone are aware of RMC (34%).



Awareness of Recycling Programs

- The following tables summarize awareness of cell phone recycling programs in general and overall awareness of the Recycle My Cell program specifically.

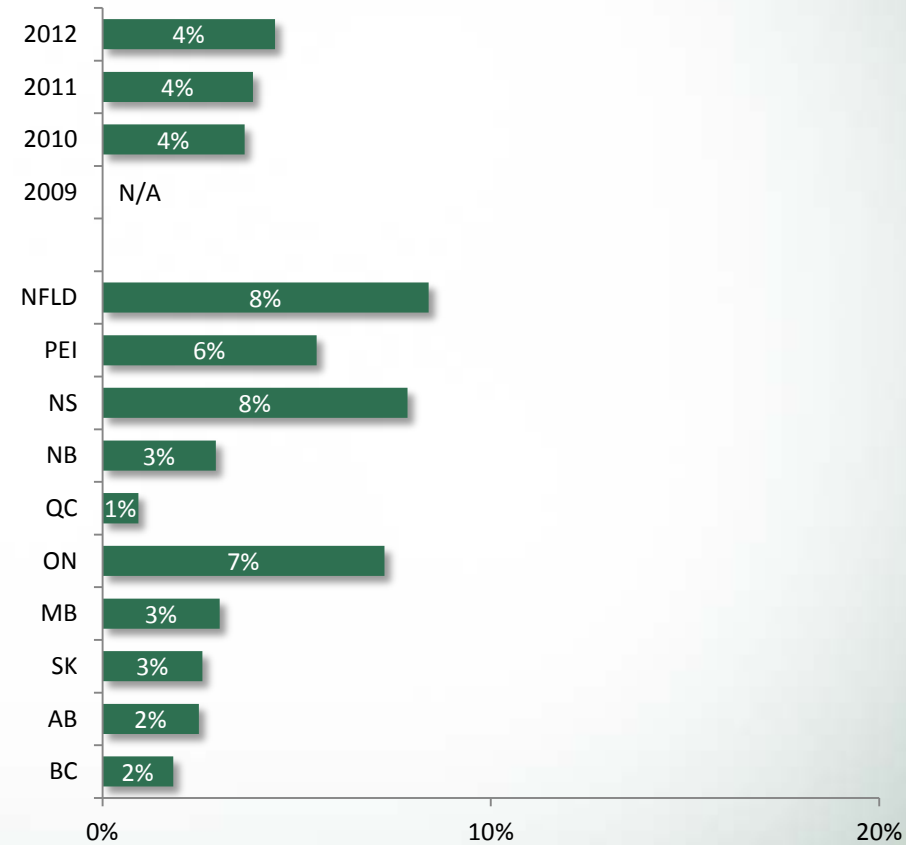
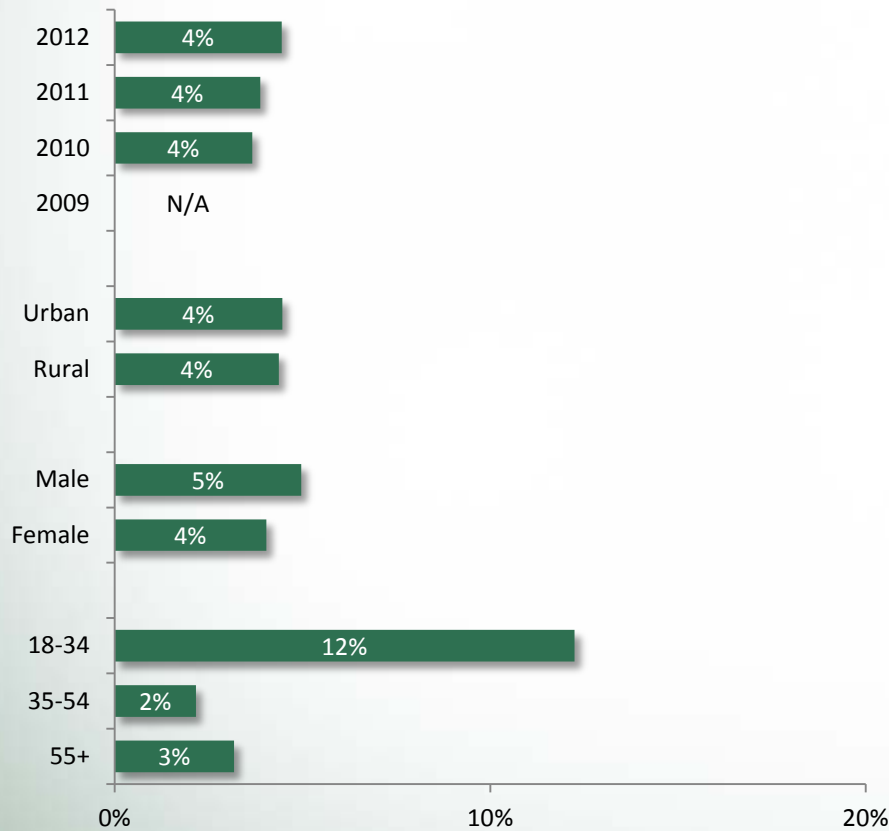
% AWARE	Total	Province									
		NFLD	PEI	NS	NB	QC	ON	MB	SK	AB	BC
Recycling programs in general	50%	<u>47%</u>	46%	<u>53%</u>	41%	35%	<u>56%</u>	<u>44%</u>	<u>62%</u>	<u>49%</u>	<u>55%</u>
Recycle My Cell – prompted + unprompted	16%	<u>26%</u>	20%	<u>18%</u>	12%	<u>19%</u>	16%	<u>20%</u>	<u>20%</u>	16%	11%

% AWARE	Total	Region		Age			Gender	
		Urban	Rural	18-34	35-54	55+	M	F
Recycling programs in general	50%	<u>51%</u>	45%	45%	<u>52%</u>	50%	50%	50%
Recycle My Cell – prompted + unprompted	16%	16%	18%	13%	16%	<u>19%</u>	18%	15%

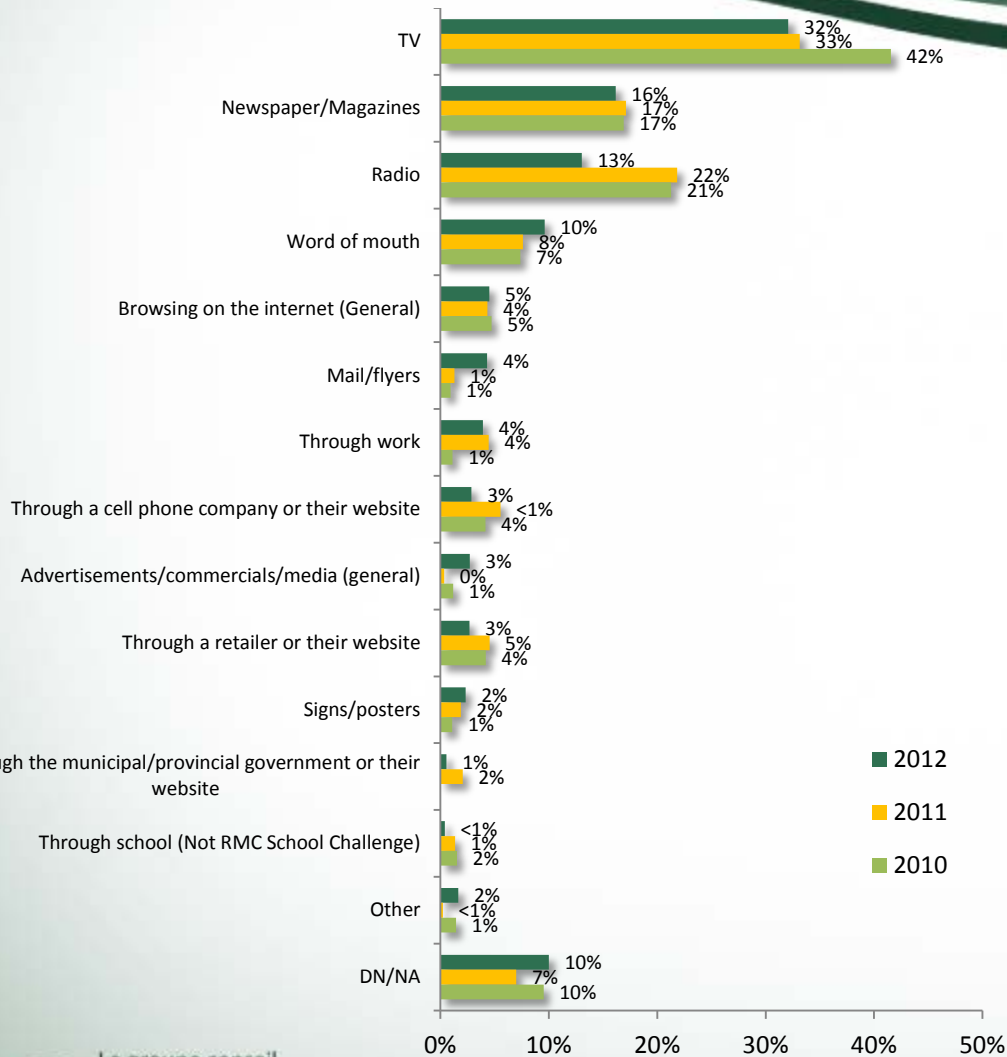
Note: Significantly different numbers are underlined

Awareness of Recycle My Cell Through Waste Reduction Week

- Only 4% of those aware of WRW recalled RMC as one of its sponsors. Awareness is significantly higher among young Canadians (18 to 34), compared to older respondents (12% vs. 3%).



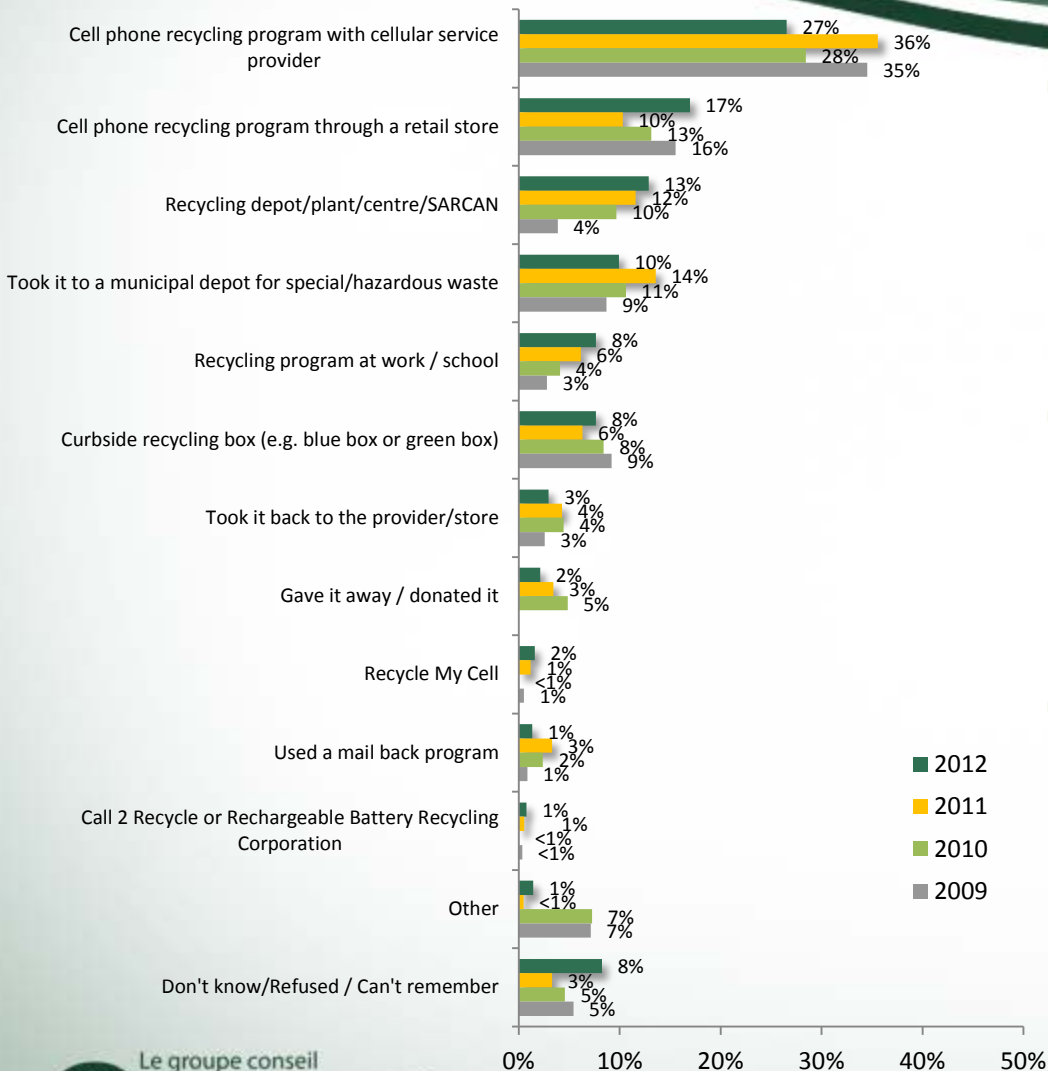
Recycle My Cell Awareness Channels



- Mass media continues to be the most commonly mentioned advertising channel for Recycle My Cell. Among all those aware of Recycle My Cell, 32% say they heard about this program through television, 16% through newspapers and magazines, and 13% over the radio. Mass media however, is showing a decreasing trend over the last three years as the way Canadians have heard of RMC.
- Television is more likely to be mentioned by Quebecers (45%).
- Newspapers and magazines are more likely to be mentioned by Canadians over 55 years old when compared to younger respondents (29% vs. 8%).
- Word of mouth is mentioned by one in ten respondents (10%).

Cell Phone Recycling

Approaches Used for Cell Phone Recycling

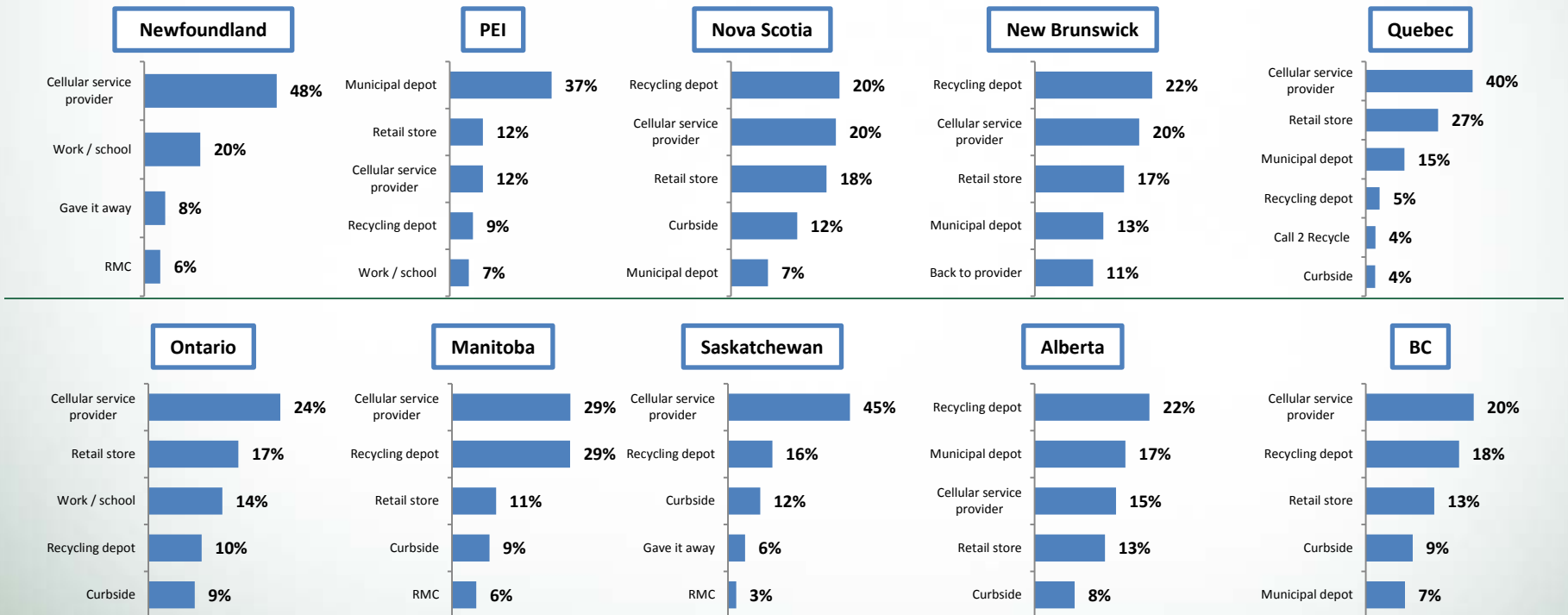


- The most common approach to recycle old phones continues to be the recycling program led by cellular service providers (27%).
 - Among the 99 respondents who mentioned a cellular service provider, only one in four (27%) was aware that these provider programs are part of the Recycle My Cell program.
- Other approaches to recycling phones include, cell phone recycling programs through retail stores (17%), recycling depots (13%), Municipal depots (10%), recycling programs at work or school (8%), curbside recycling boxes (8%), and returning it to their cell phone provider (3%).
- Approaches becoming increasingly popular since 2009 include:
 - Recycling depots, plants and centres (e.g. SARCAN) (4% in 2009 to 13% in 2012), and,
 - Recycling programs at work and / or school (3% in 2009 to 8% in 2012).

Approaches Used for Cell Phone Recycling

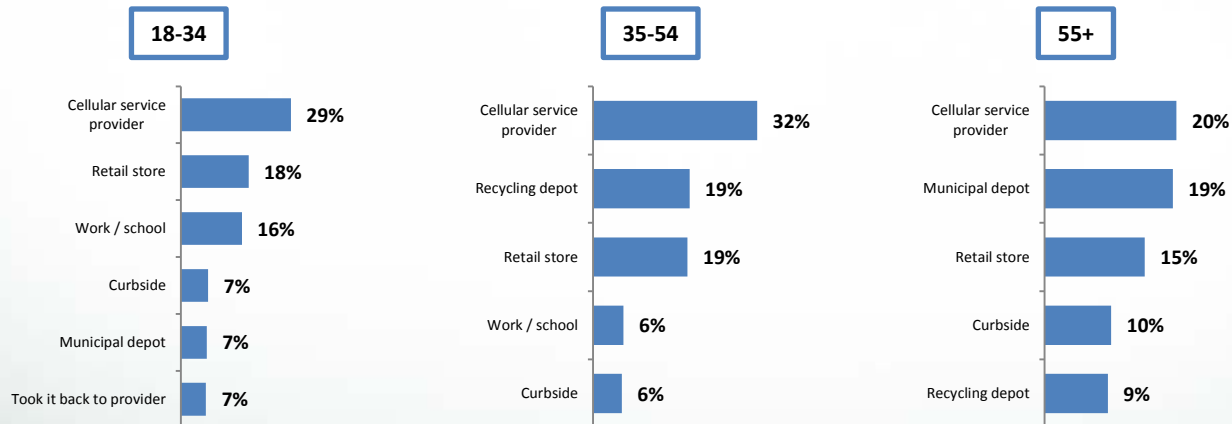
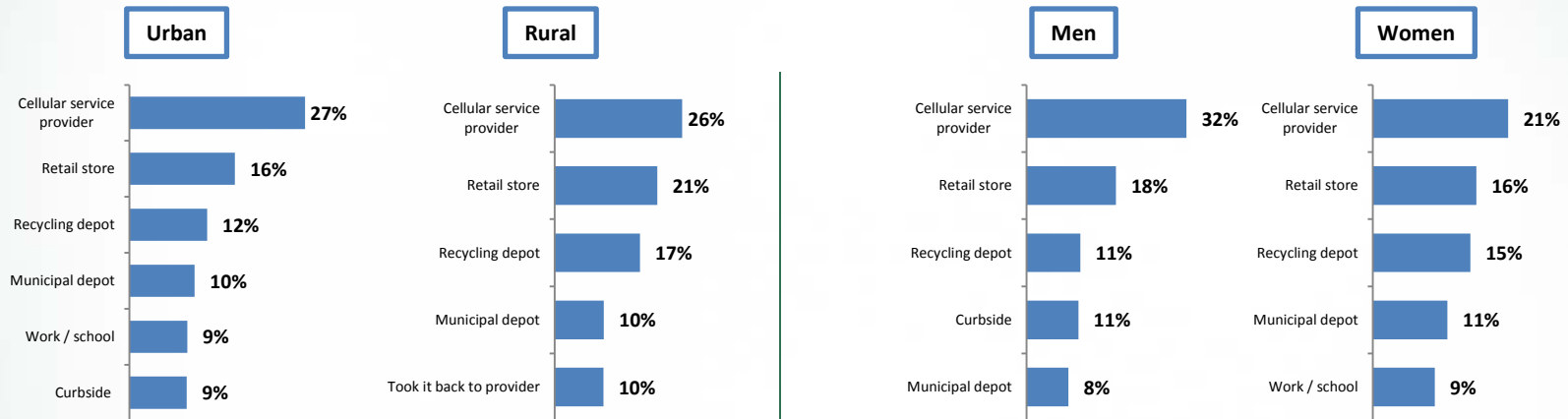
– Top 5 responses by province

- The most common approaches for cell phone recycling by province and by demographic variables are shown on this slide and the next slide, however the sample sizes are too small to highlight any significant differences.



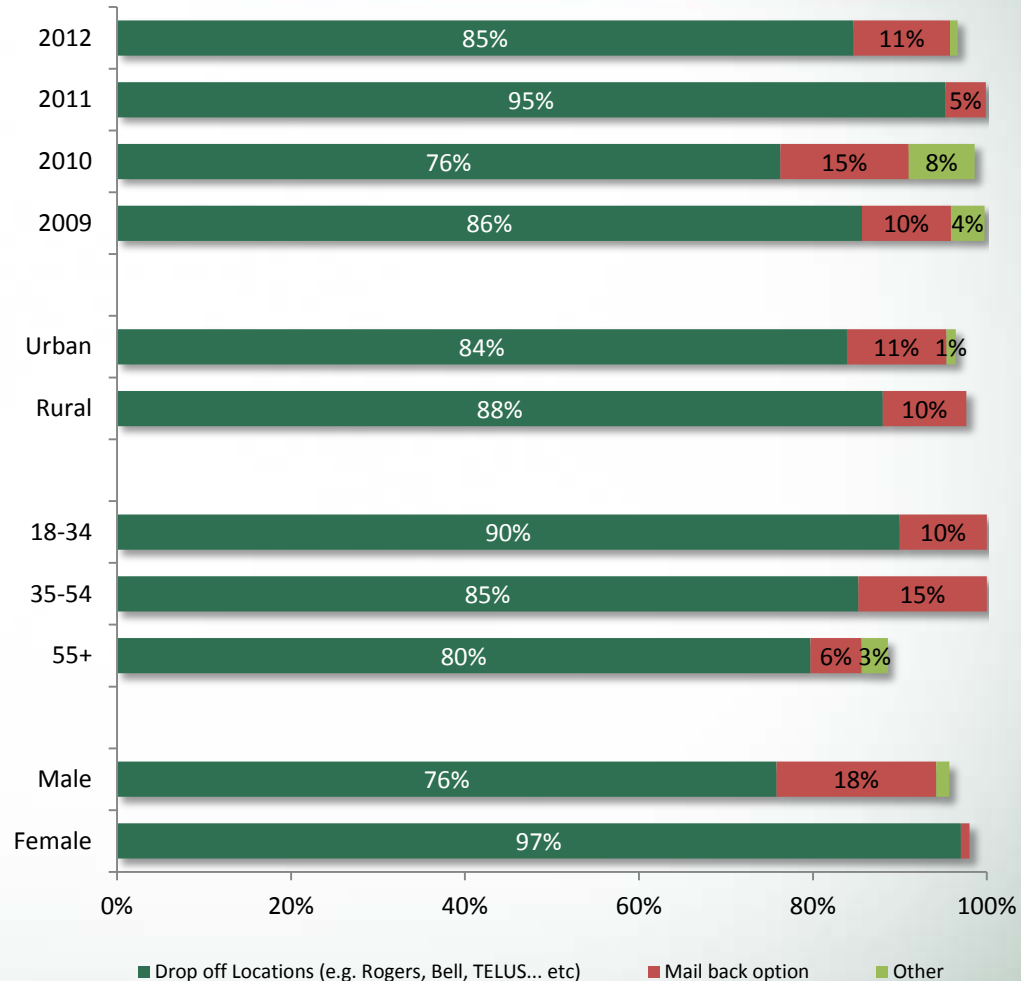
Approaches Used for Cell Phone Recycling

– Top 5 responses by demographic



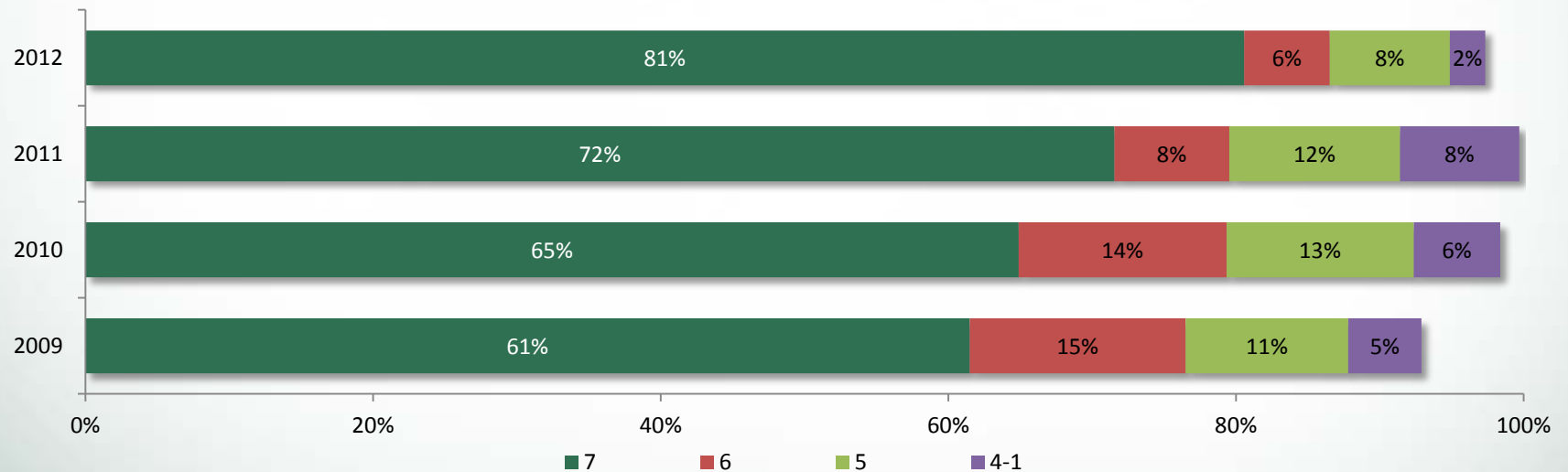
Mail-back vs. Drop-off Recycling

- Over four in five respondents using the Recycle My Cell program as a service to recycle their old phone used the drop-off locations, while 11% say they used the mail-back option.
- Women using the RMC program are more likely than men to drop-off their previous phone at specific locations compared to men.
- No other significant differences can be highlighted due to small sample sizes.

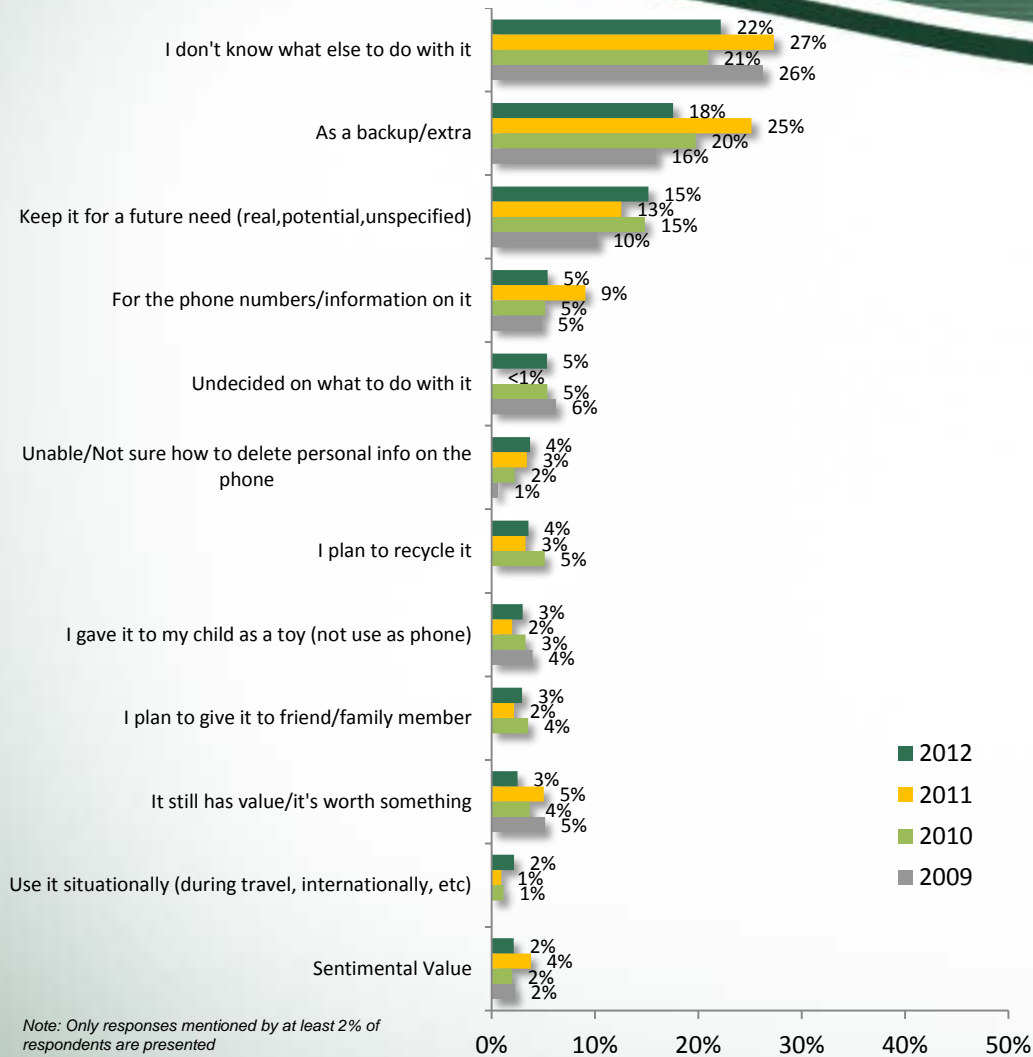


Satisfaction with Cell Recycling Experience

- The vast majority (95%) of those who recycled their phone through Recycle My Cell are satisfied with their cell recycling experience, giving at least a score of 5 on a 7-point scale. In fact, fully 81% gave a perfect score of “7”. Although not statistically significant, this is a noteworthy increase from 61% in 2009.
- When “satisfied” respondents were asked to explain their rating, 57% said the process was easy and had no issues, and 19% said the information was good and they knew the recycling will be done properly. The few dissatisfied respondents tended to find the process inconvenient in terms of location and/or hours of operation, but still considered the process easy.
- No other significant differences can be highlighted due to small sample sizes.



Reasons for Not Recycling Prior Cell Phone

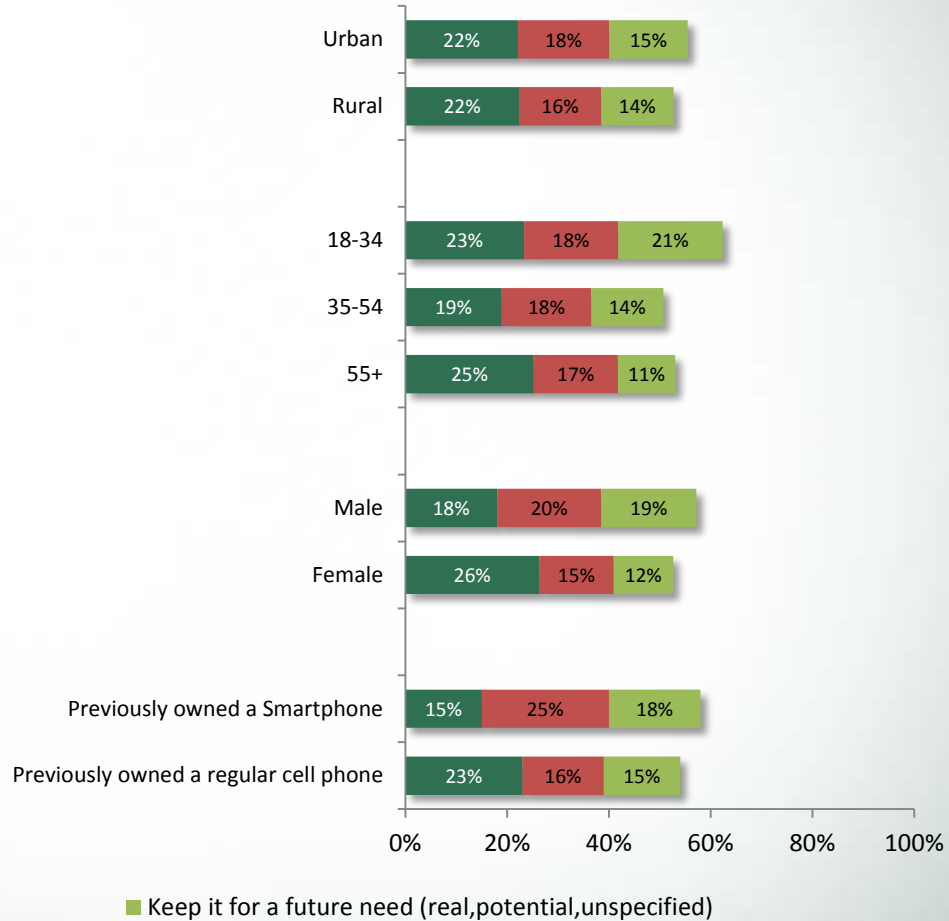
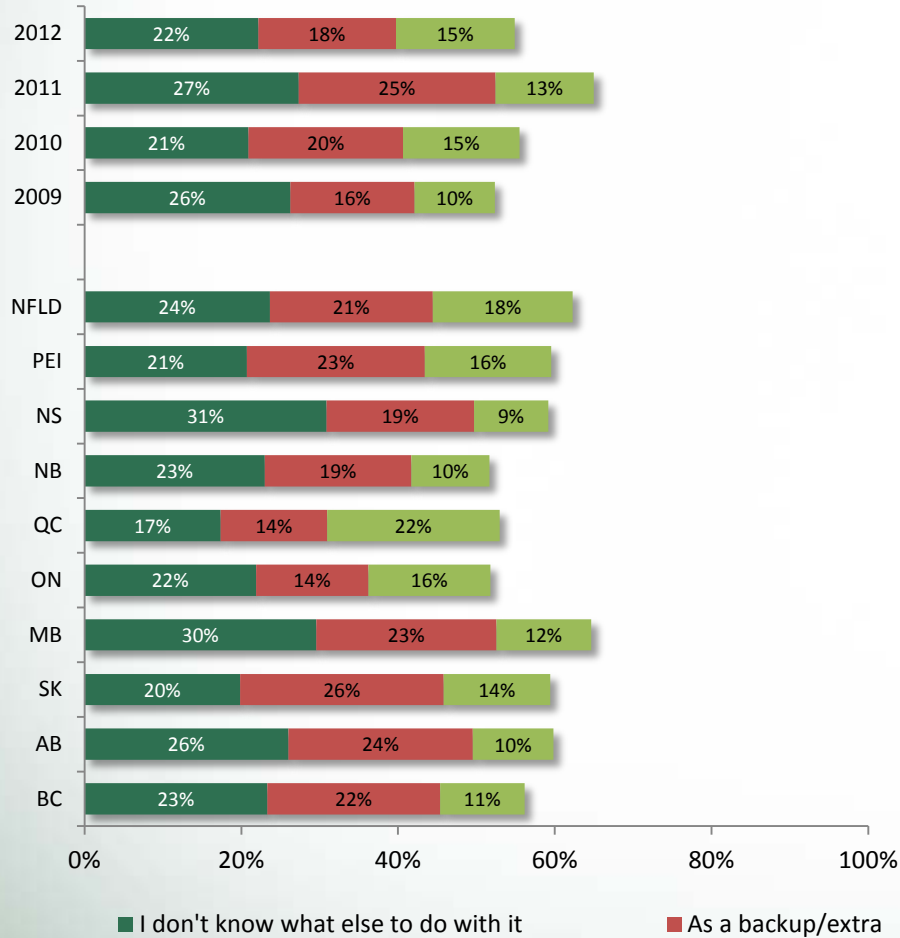


Note: Only responses mentioned by at least 2% of respondents are presented

- The main three reasons why Canadians keep their old cell phone instead of recycling it are: because they do not know what else to do with it (22%), to have a back up device (18%), and to keep it for a future need (15%).
- As shown on the following slide, those 18 to 34 years old are more likely than those over 55 to say they kept their old cell phone for future use (21% vs. 11%).
- Women are more likely than men to indicate they did not know what else to do with their phone (26% vs. 18%).
- Those who previously had a Smartphone are more likely to say they keep it as a back up, compared to those who had a regular cell phone (25% vs. 16%), while the latter are more likely to say they did not know what else to do with the old phone (23% vs. 15%).

Reasons for Not Recycling Prior Cell Phone

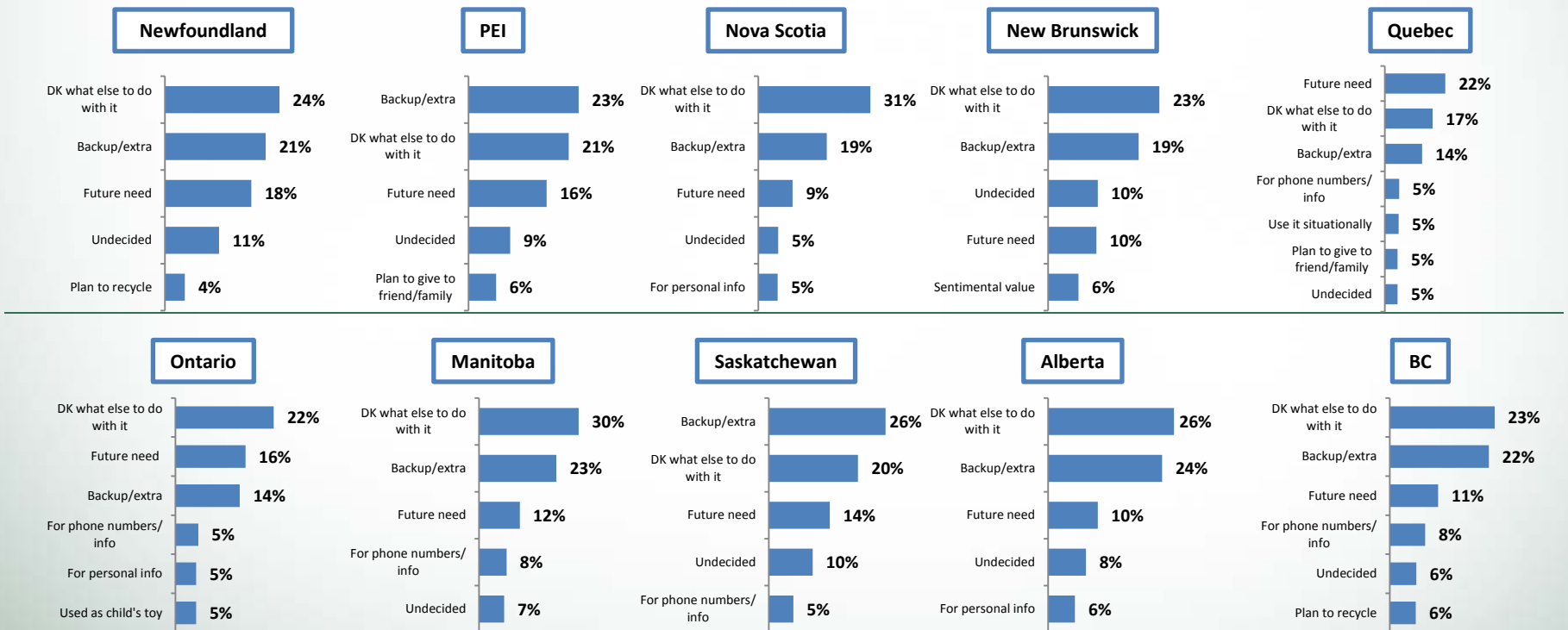
– Top 3 responses



Reasons for Not Recycling Prior Cell Phone

– Top responses by province

- The most common reasons for not recycling old phones by province are displayed on this slide. Nova Scotia and Manitoba residents are more likely to say they keep their phone because they do not know what else to do with it. Respondents in Saskatchewan are more likely than those in Quebec and Ontario to say they keep their previous phone as a back up (26% vs. 14%). Quebecers are the most likely to say they keep their old phone for a future need (22%) compared to the rest of Canada.

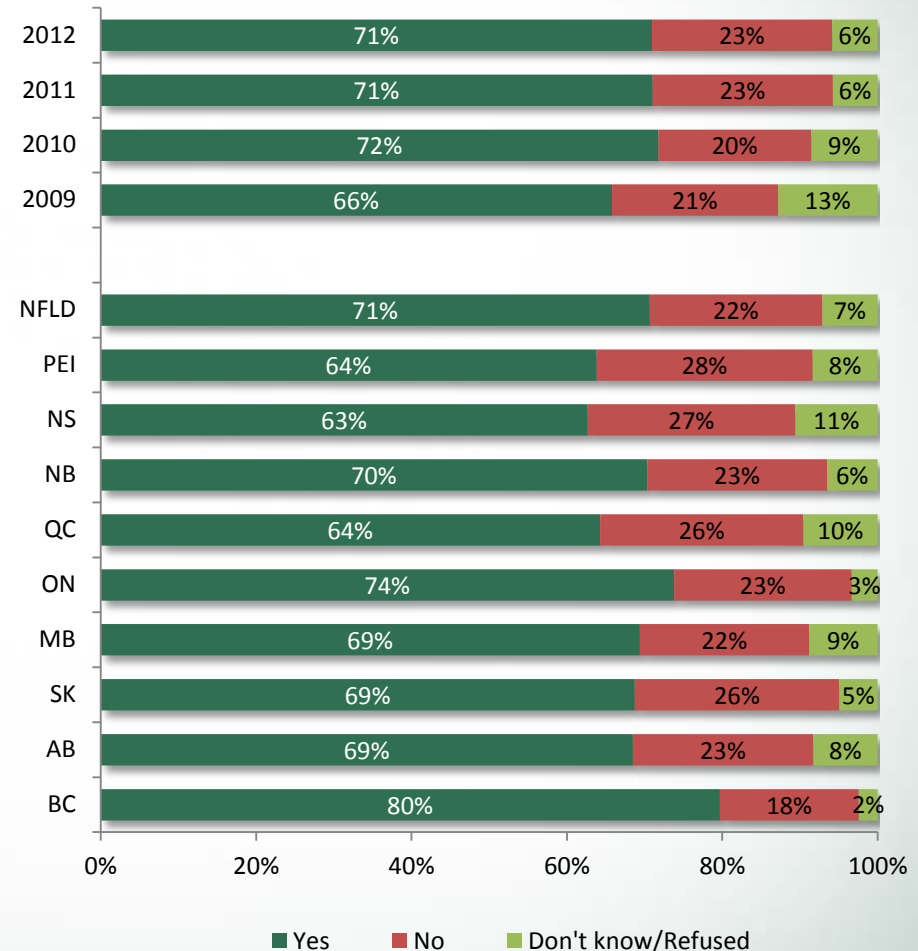


Potential for Cell Phone Recycling

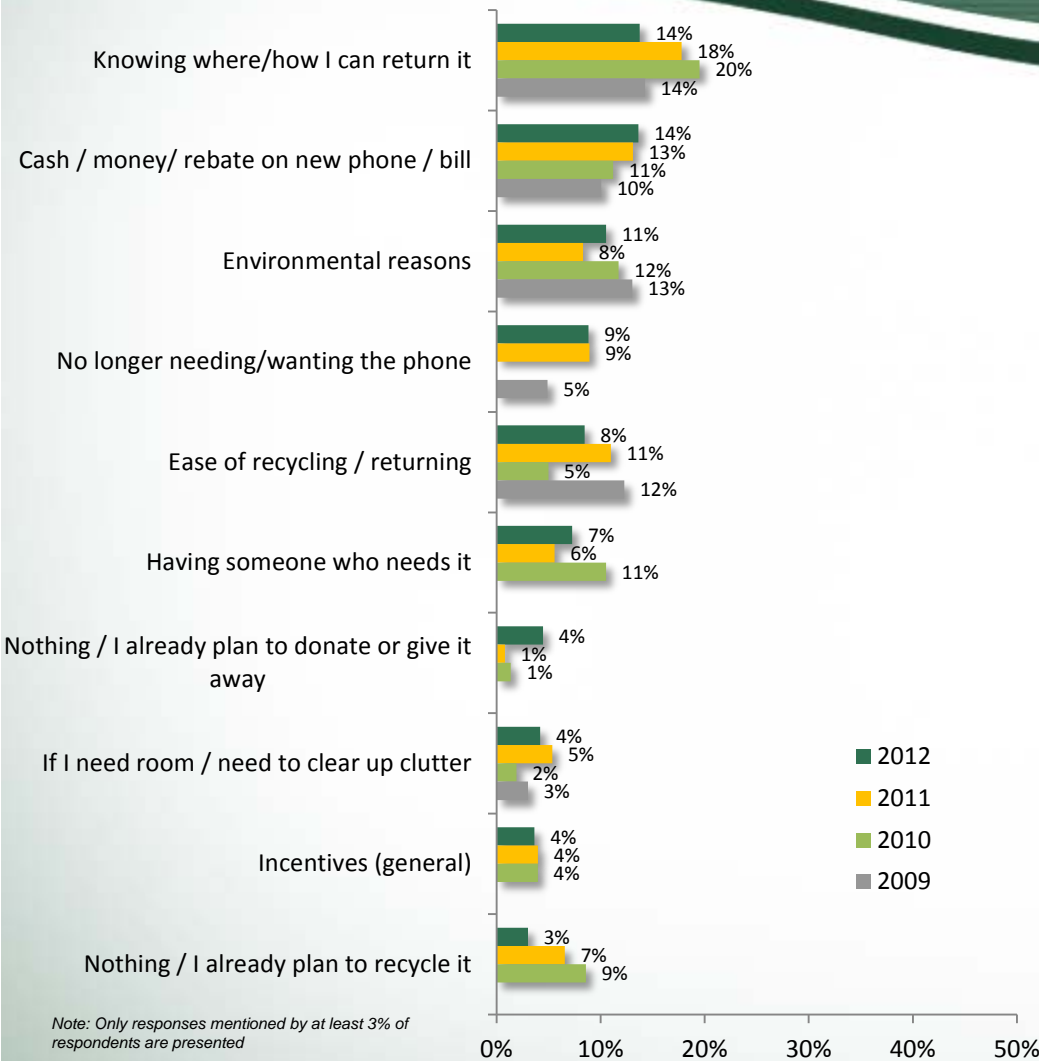
Likelihood of Recycling in the Future

– by province

- Over two thirds (71%) of Canadians currently storing an old cell phone say they would be willing to recycle or return it. Nearly one quarter (23%) do not think they will recycle their phone, and 6% do not know whether or not they would.
- Likelihood of recycling stored cell phones is consistent with results obtained since 2010.
- Interest in recycling their stored phones is highest among respondents in British Columbia while resistance seems a little higher in PEI, Nova Scotia, Quebec, Saskatchewan, and Alberta.
- Respondents who previously owned a regular cell phone are more likely to say they will recycle their phone in the future, compared to those whose previous phone was a Smartphone (74% vs. 63%).



Encouraging Cell Phone Recycling



Note: Only responses mentioned by at least 3% of respondents are presented

- Nearly one in ten would feel motivated to recycle their old cell phone:
 - If they had more information on how they can return their phone (14%);
 - For environmental reasons (11%);
 - If they did not need or want the phone anymore (9%);
 - If the process were easy (8%);
 - If they had someone in need for the old phone (7%).

- Another 14% would feel encouraged to recycle their old phone(s) if there was a monetary incentive or a rebate on a new phone or their phone bill and another 4% referred to incentives in general. These results are consistent with previous surveys.

Encouraging Cell Phone Recycling

– Top responses

Men are more likely than women to recycle if they were offered some sort of incentive, while Newfoundland residents are the least likely province to feel motivated to recycle their phones with a monetary incentive. Women are more likely to say they would recycle if there were an easy process and available facilities in place. An environmental message would especially resonate among Quebecers.

What would encourage you to recycle or return it?	Total	Region		Age			Gender	
		Urban	Rural	18-34	35-54	55+	M	F
Knowing where / how can I return it	14%	12%	<u>19%</u>	15%	14%	12%	12%	16%
Cash / money / rebate on new phone / bill	14%	14%	11%	12%	16%	12%	<u>17%</u>	10%
Environmental reasons	11%	11%	9%	11%	8%	13%	11%	10%
No longer needing or wanting the phone	9%	9%	10%	12%	7%	8%	10%	7%
Ease of recycling / availability of facility	8%	9%	7%	10%	8%	7%	6%	<u>11%</u>
Having someone who needs it	7%	7%	7%	7%	8%	6%	6%	9%

What would encourage you to recycle or return it?	Total	Province									
		NFLD	PEI	NS	NB	QC	ON	MB	SK	AB	BC
Knowing where / how can I return it	14%	15%	10%	16%	<u>19%</u>	8%	13%	14%	12%	<u>21%</u>	<u>17%</u>
Cash / money / rebate on new phone / bill	14%	7%	<u>21%</u>	<u>20%</u>	12%	10%	12%	<u>19%</u>	<u>22%</u>	<u>15%</u>	<u>18%</u>
Environmental reasons	11%	<u>13%</u>	7%	7%	5%	<u>21%</u>	7%	8%	7%	6%	10%
No longer needing or wanting the phone	9%	5%	6%	9%	9%	4%	11%	10%	5%	<u>13%</u>	8%
Ease of recycling / availability of facility	8%	8%	8%	6%	5%	4%	<u>11%</u>	8%	<u>11%</u>	9%	10%
Having someone who needs it	7%	8%	6%	8%	<u>16%</u>	4%	9%	<u>10%</u>	8%	4%	8%

Note: Significantly different numbers are underlined

Encouraging Cell Phone Recycling

- by likelihood of recycling it in the future

- Sixteen percent of those already inclined to recycle their phone simply need to be informed of where and how they can actually do it. Nearly one in ten would need environmental reasons (14%), an easy way of recycling (11%), no longer needing or wanting the phone (9%), or having someone who needs their used phone (9%).
- Those who did not anticipate recycling their phone in the future are more likely to say a monetary incentive or rebate would encourage them to recycle their old phone (25%). They also appear to be willing to recycle only when they feel they no longer need the old phone (11%). Fully 11% feel nothing would encourage them to recycle or return their previous phone.

What would encourage you to recycle or return it?	Total	Likelihood to Recycle (2012)		
		Would Recycle	Would not Recycle	Undecided
Knowing where / how can I return it	14%	<u>16%</u>	9%	4%
Cash / money / rebate on new phone / bill	14%	9%	<u>25%</u>	<u>25%</u>
Environmental reasons	11%	<u>14%</u>	3%	1%
No longer needing or wanting the phone	9%	<u>9%</u>	<u>11%</u>	1%
Ease of recycling / availability of facility	8%	<u>11%</u>	3%	3%
Having someone who needs it	7%	<u>9%</u>	4%	1%
Nothing	4%	2%	<u>11%</u>	1%

Note: Significantly different numbers are underlined

Encouraging Cell Phone Recycling

- by type of previous cell phone

- As mentioned previously in the report, respondents who have a Smartphone stored still see value in it, and therefore they are more likely to feel motivated to recycle their previous Smartphone if they could sell it or receive a rebate or incentive, compared to those storing a regular cell phone (22% vs. 11%).

What would encourage you to recycle or return it?	Total	Type of previous cell phone	
		Smartphone	Regular Cell Phone
Knowing where / how can I return it	14%	10%	15%
Cash / money / rebate on new phone / bill	14%	<u>22%</u>	11%
Environmental reasons	11%	14%	10%
No longer needing or wanting the phone	9%	10%	9%
Ease of recycling / availability of facility	8%	7%	9%
Having someone who needs it	7%	5%	8%
Nothing	4%	1%	4%

Note: Significantly different numbers are underlined