

Canadian Wireless Telecommunications Association

2014 National Cell Phone Recycling Study

January 2015

Table of Contents

Executive Summary

Executive Summary

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 yearly surveys conducted since 2009 by CWTA.

RESEARCH METHODOLOGY

- A total of 4,013 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 18th to December 16th 2014.
- The data is weighted to replicate actual population distributions according to 2011 Census data.

Executive Summary

RESEARCH RESULTS

OWNERSHIP AND USAGE

- Over three quarters of adult Canadians own a cell phone (78%), whether for personal use (73%), or for both business and personal use (5%). Another 6% do not currently have a cell phone, but plan to have one in the future.
- Similar to previous years, most cell phone owners (92%) purchased a new phone as opposed to acquiring a second hand one. The main reasons for not purchasing a second hand phone are that the cellular service providers offer the new phone with the new contract, or because they wanted a new model. On average, Canadians have used their current phone for nearly 2 years (21 months).
- Canadians have owned on average 3 or 4 cell phones prior to their current one. Their previous phone was used on average 27 months (just over 2 years).
- The use of Smartphones has increased significantly since 2012, from 52% to 69%, while the use of regular featured phones decreased from 47% to 30%. Those more likely to have Smartphones continue to be men, young Canadians, as well as those living in urban areas.

Executive Summary

USED CELL PHONES STATUS

- Two in five Canadians (40%) store their old handsets when new cell phones are obtained.
 - ✓ 40% stored it away..... Storing old phones is less likely to happen in British Columbia, while it is more likely to happen in Manitoba and Saskatchewan. Respondents are more likely to store regular featured phones than Smartphones. The average time cell phones have been stored is 11 months.
- Another 44% put their old cell phone to use one way or another:
 - ✓ 20% gave it or sold it to a friend or relative..... Alberta residents are the most likely to do this. The younger respondents are the more likely they are to give or sell their old phone to a friend or relative. If respondents owned their old phone for no longer than 4 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 featured phone.
 - ✓ 10% recycled it..... The older Canadians are the more likely they are to have recycled their used phones. Also, British Columbia residents are more likely to have recycled unused phones, or those whose previous phone was a regular featured phone.
 - ✓ 9% returned it to a store or their cell phone company..... PEI and Saskatchewan residents, those over 54 years old, and those who live in an urban area are more likely to return the used cell phone to a store or their cell phone company.
 - ✓ 5% threw it away in the garbage Residents of Newfoundland are more likely than those in any other province to throw their old phone away in the garbage.

Executive Summary

AWARENESS OF CELL PHONE RECYCLING AND RECYCLE MY CELL PROGRAM

- Half of Canadians (50%) are aware of recycling programs for cell phones. Awareness is lower in New Brunswick, PEI, Manitoba, and Newfoundland.
- While nearly two thirds of respondents say they may recycle their stored cell phone in the future, those who previously owned a Smartphone are more likely to say they will *not* recycle it, compared to those whose previous phone was a regular featured phone (36% vs. 27%).
- At 23%, 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. Despite a slight increase from 2010 to 2011, RMC awareness has remained stable for the last 4 years.
- Television, radio, print (newspapers and magazines), and word of mouth are the most common ways through which Canadians have heard about Recycle My Cell.

Executive Summary

CELL PHONE RECYCLING

RECYCLERS

- Satisfaction with Recycle My Cell is very high. Over 4 in 5 users (84%) assigned a positive rating to their cell phone recycling experience.
- 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. Municipal depots,
 4. recycling depots, and
 5. the curbside recycling box.
- Respondents who previously owned a regular cell phone are more likely to have recycled it compared to those who owned a Smartphone.

NON-RECYCLERS

- Nearly two thirds of Canadians (63%) who have a previous cell phone in storage say they would be willing to recycle or return it in the future.
- The main barrier for cell phone recycling is the lack of information among consumers. When asked why they have kept their phone in storage, respondents affirm they kept their phone because they did not know (21%) or are undecided (2%) on what to do with the device.
- Others simply do not recycle it because they still use it one way or another. Over a fifth keep their phone as a back-up (22%), for the information on it (11%), to listen to music or play games (3%), or as a toy for their children (2%).
- Potential recyclers say not needing the phone anymore, having information on how to return the stored cell phone, having access to an easy or convenient recycling process, and environmental concerns 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.

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 18th to December 16th 2014.
- A total of 4,013 survey participants completed the 7-minute survey.
- The results of this report are a follow-up study from yearly studies conducted since 2009 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 weighed to replicate actual population distributions by province, age, and gender, within Canada according to 2011 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	401	+/- 4.9%
Prince Edward Island	402	+/- 4.9%
Nova Scotia	401	+/- 4.9%
New Brunswick	401	+/- 4.9%
Quebec	402	+/- 4.9%
Ontario	401	+/- 4.9%
Manitoba	401	+/- 4.9%
Saskatchewan	403	+/- 4.8%
Alberta	400	+/- 4.9%
British Columbia	401	+/- 4.9%
Total	4,013	+/- 1.5%

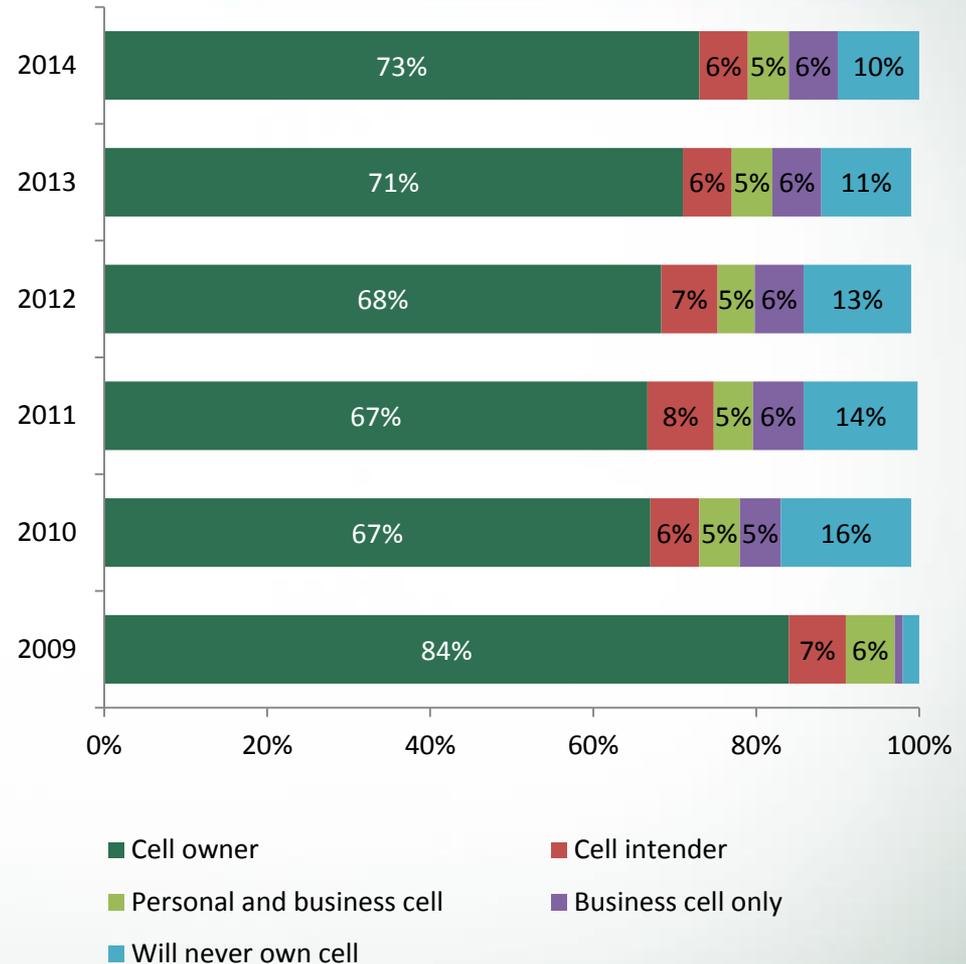
Detailed Findings

Cell Phone Ownership

Cell Phone Ownership Status

- by year

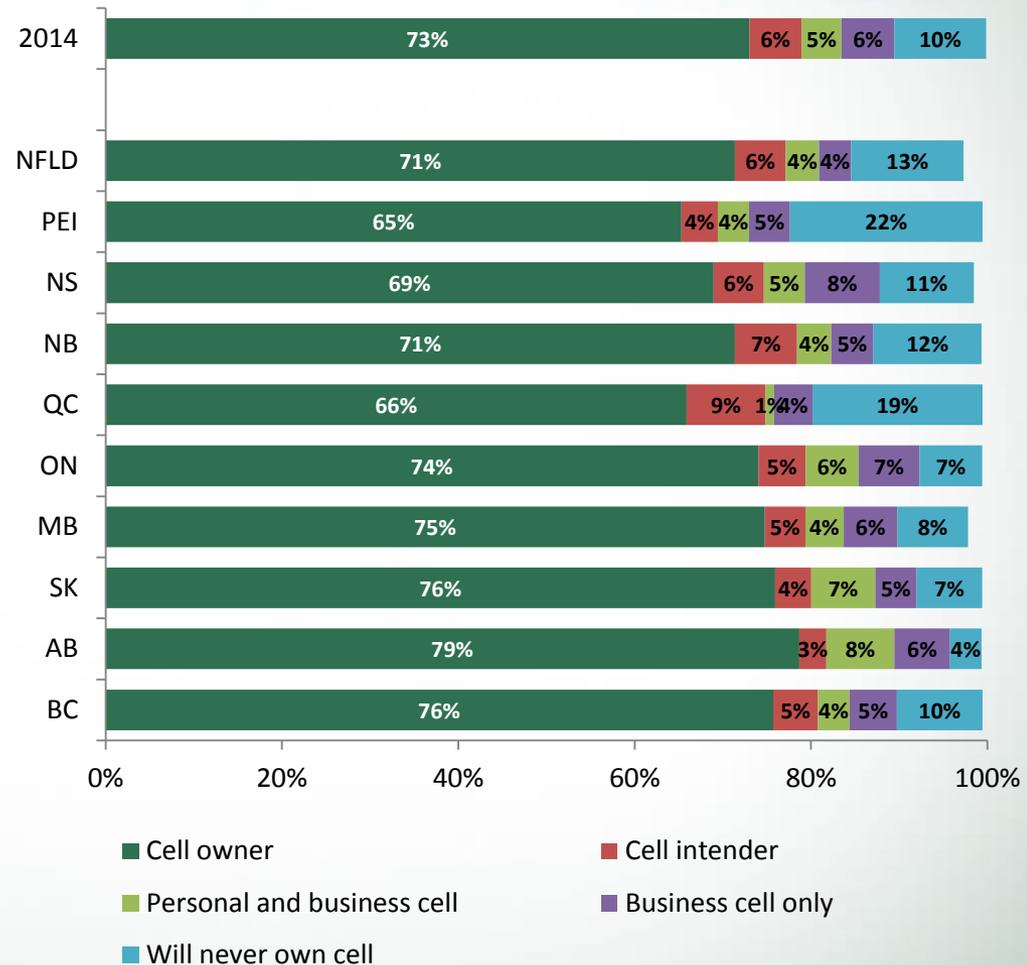
- Personal cell phone ownership has been slowly increasing since 2010. As observed on this graph, nearly 4 in 5 adult Canadians currently own a cell phone, of which 73% are personal cell owners, and 5% have both a personal and a business cell phone. This is a significant and steady increase particularly in the last 3 years.
- An additional 6% of respondents in 2014 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 10% say they do not have a cell phone and do not plan on getting one in the future. Those never planning on owning a cell phone are much less common compared to a few years ago – in 2010 they represented 16% of respondents.



Cell Phone Ownership Status

- by province

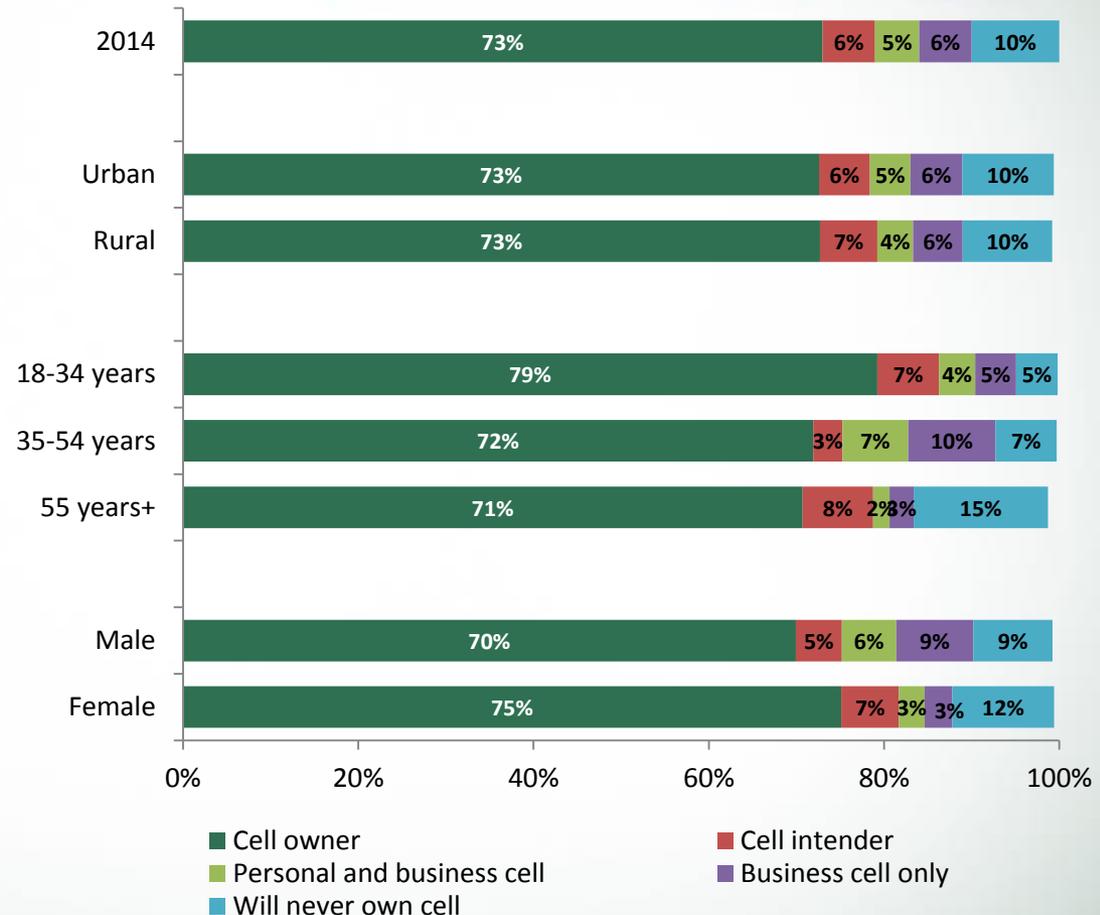
- While Quebec and PEI report the lowest cell phone penetration (67% and 69% respectively) there is still a growing trend in ownership in these provinces since 2011, when incidence only measured 62% in each of these provinces.
- Cell phone ownership is generally high in all provinces west of Quebec, with Alberta and Saskatchewan leading the charge at 87% and 83% respectively.



Cell Phone Ownership Status

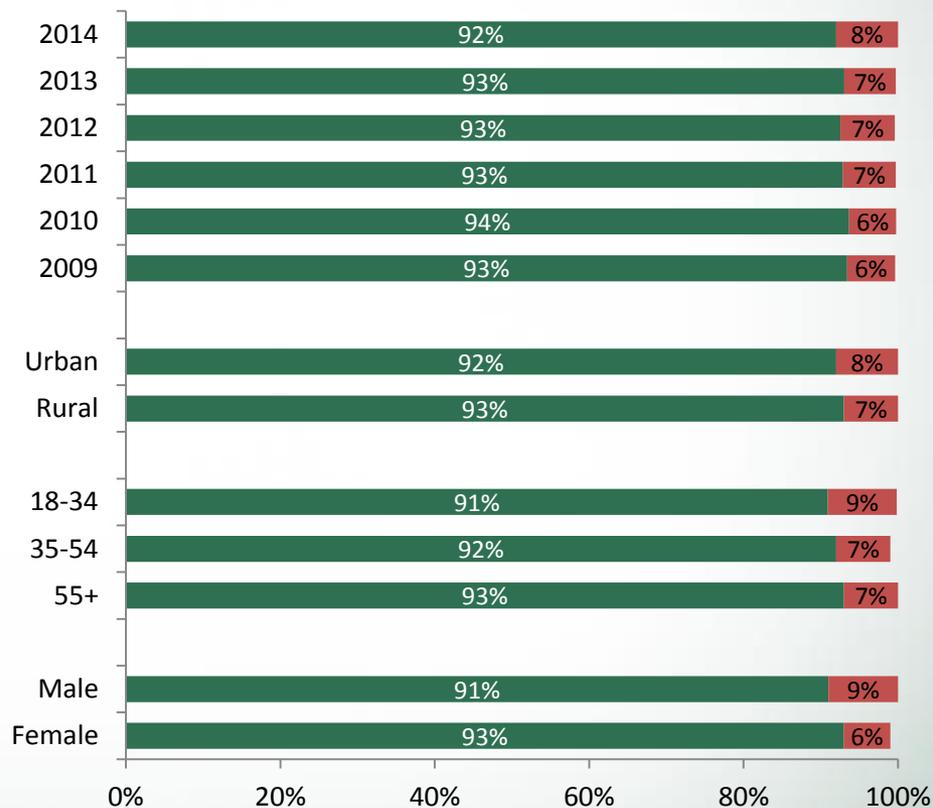
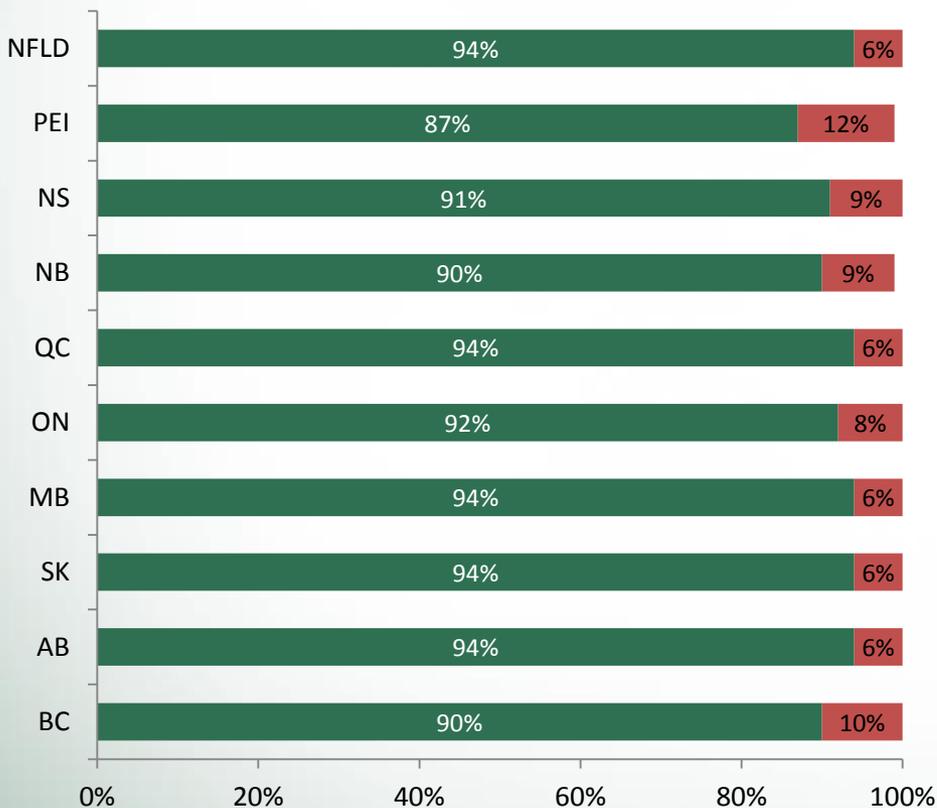
– by demographic

- Men are more likely to have both employer-paid and personal cell phones (6% vs. 3%). They are also more likely to have one exclusively provided by their employer (9% vs. 3%).
- Respondents under 55 years old are more likely to have a cell phone (81%), compared to older respondents (73%). Older respondents were more likely than their younger counterparts to say they will never own a cell phone (15% vs. 6%).

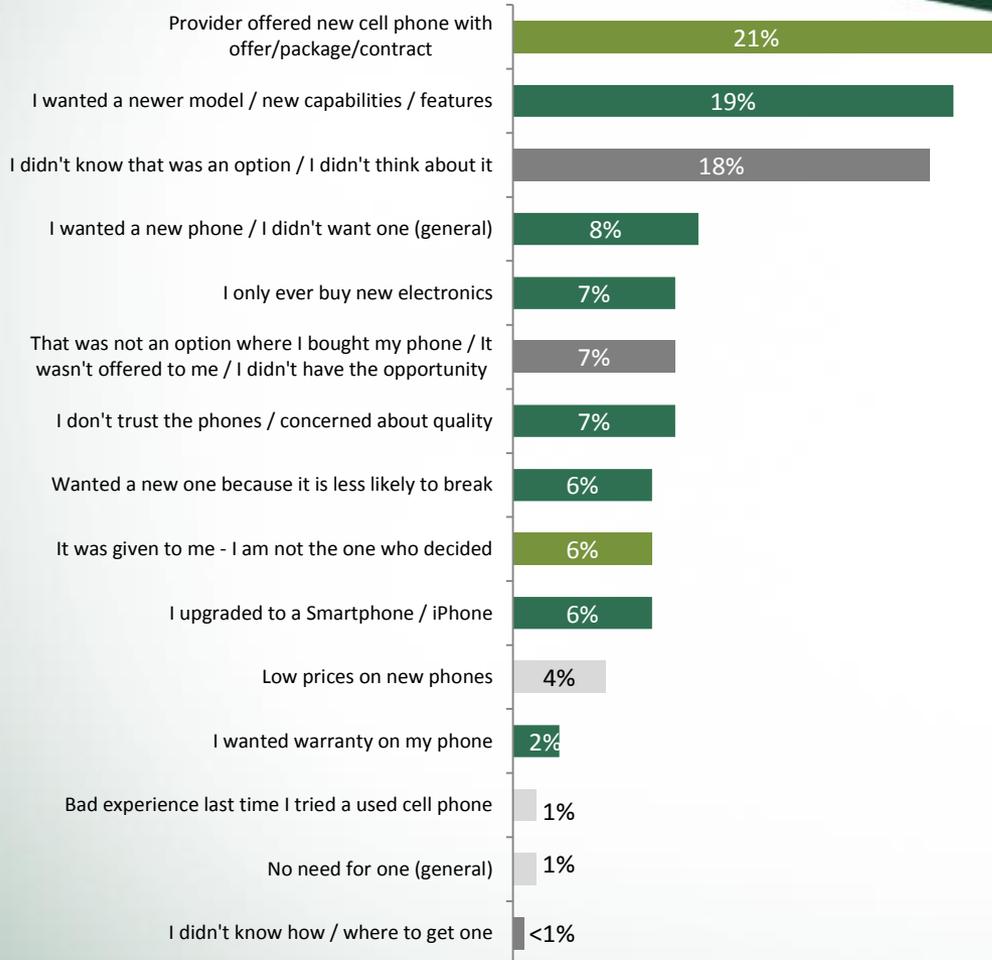


New vs. Second Hand Cell Phones

- Virtually all cell phone owners bought or received a new phone (92%), while only 8% say they bought it or received it second hand or refurbished. PEI residents are more likely to say they bought or received it second-hand or refurbished. Results are consistent across all other provinces and demographics.



Reasons for Not Purchasing Second Hand Phones



- Canadians did not buy a second-hand phone mainly because their service provider offered a new cell phone with the contract (21%). Upon further analysis, we can see that the reasons for not purchasing a second-hand phone can be grouped into three broad themes:

1. These consumers **purposely look for new devices** (47%). This action could be triggered for several reasons: upgrading to get new capabilities or features, ensuring good quality of their device, and to have a warranty on it (bars in dark green);
2. **The option was not presented to them** (26%). This is whether because a new phone is offered to them by their service provider or because they did not make the decision themselves (bars in light green); and
3. **Consumers do not know this option exists or how to go about it** (24%) (bars in dark gray).

- Other motivations to buy new cell phones include their low prices, having previously had a bad experience with used phones, or not seeing the need for one (bars in light gray).

- Smartphone owners are more likely than regular cell phone owners to say they wanted a new model, capabilities or features (22% vs. 11%).

Reasons for Not Purchasing Second Hand Phones

– by year

- Respondents continue to say their cell phone service provider offered a new cell phone with their cellular service as a reason for not purchasing a second hand cell phone (18% in 2009 vs. 21% in 2014). Conversely, less are saying they did not know buying second phones was an option (25% in 2009 vs. 18% in 2014).
- The popularity of new phones and their new features is also noticeable over time. More and more respondents say they don't buy second hand phones since they are looking for the new capabilities and features in newer phones (12% in 2009 vs. 19% in 2014). Also, more respondents are concerned about the quality of a second-hand phone (3% in 2010 vs. 7% in 2014).

TOP 7 RESPONSES	Year					
	2014	2013	2012	2011	2010	2009
Provider offered new cell phone with offer/package/contract	<u>21%</u>	<u>21%</u>	18%	<u>20%</u>	17%	18%
I wanted a newer model / new capabilities / features	<u>19%</u>	<u>15%</u>	12%	14%	12%	12%
I didn't know that was an option / I didn't think about it	18%	20%	21%	<u>25%</u>	<u>28%</u>	<u>25%</u>
I wanted a new phone / I didn't want one (general)	<u>8%</u>	<u>7%</u>	5%	4%	<u>10%</u>	<u>6%</u>
I only ever buy new electronics	7%	<u>8%</u>	7%	7%	6%	6%
That was not an option where I bought my phone / It wasn't offered to me / I didn't have the opportunity	7%	5%	<u>8%</u>	7%	7%	<u>7%</u>
I don't trust the phones / concerned about quality	<u>7%</u>	<u>5%</u>	3%	4%	3%	4%

Note: Significantly different numbers are underlined

Reasons for Not Purchasing Second Hand Phones

– by province

- Quebec and British Columbia residents are more likely than residents of other provinces to say they did not buy a used phone because providers offered a new phone with the contract.
- Quebec residents are the *least* likely to say they didn't buy a second hand cell phone to try the newer models' capabilities and features.
- Quebec residents are more likely than Newfoundland and PEI residents to say that buying a second-hand phone was not an option where they bought their phone or they weren't offered that option.
- British Columbia residents are the most likely to say they don't trust the quality of second-hand phones, particularly when compared to provinces East of Ontario.

TOP 7 RESPONSES	Total	Province									
		NFLD	PEI	NS	NB	QC	ON	MB	SK	AB	BC
Provider offered new cell phone with offer/package/contract	21%	16%	16%	16%	17%	<u>27%</u>	18%	20%	16%	17%	<u>24%</u>
I wanted a newer model / new capabilities / features	19%	<u>20%</u>	<u>16%</u>	<u>20%</u>	<u>21%</u>	7%	<u>24%</u>	<u>15%</u>	<u>22%</u>	<u>24%</u>	<u>20%</u>
I didn't know that was an option / I didn't think about it	18%	22%	20%	17%	16%	21%	16%	19%	20%	20%	16%
I wanted a new phone / I didn't want one (general)	8%	5%	5%	<u>8%</u>	4%	<u>10%</u>	<u>8%</u>	7%	6%	6%	4%
I only ever buy new electronics	7%	9%	<u>11%</u>	9%	8%	8%	8%	8%	6%	8%	5%
That was not an option where I bought my phone / It wasn't offered to me / I didn't have the opportunity	7%	4%	4%	6%	5%	<u>9%</u>	6%	7%	7%	6%	8%
I don't trust the phones / concerned about quality	7%	5%	3%	3%	4%	5%	<u>7%</u>	6%	6%	<u>7%</u>	<u>10%</u>

Note: Significantly different numbers are underlined

Reasons for Not Purchasing Second Hand Phones

– by demographic

- Respondents under 55 years of age are more likely to say their provider offered them a new cell phone with their contract, compared to older respondents.
- Men are more likely than women to say they bought a new phone or model for the new capabilities and features (22% vs. 17%).
- Respondents at least 55 years of age are more likely than those under 35 to say they didn't know buying a second-hand phone was an option.

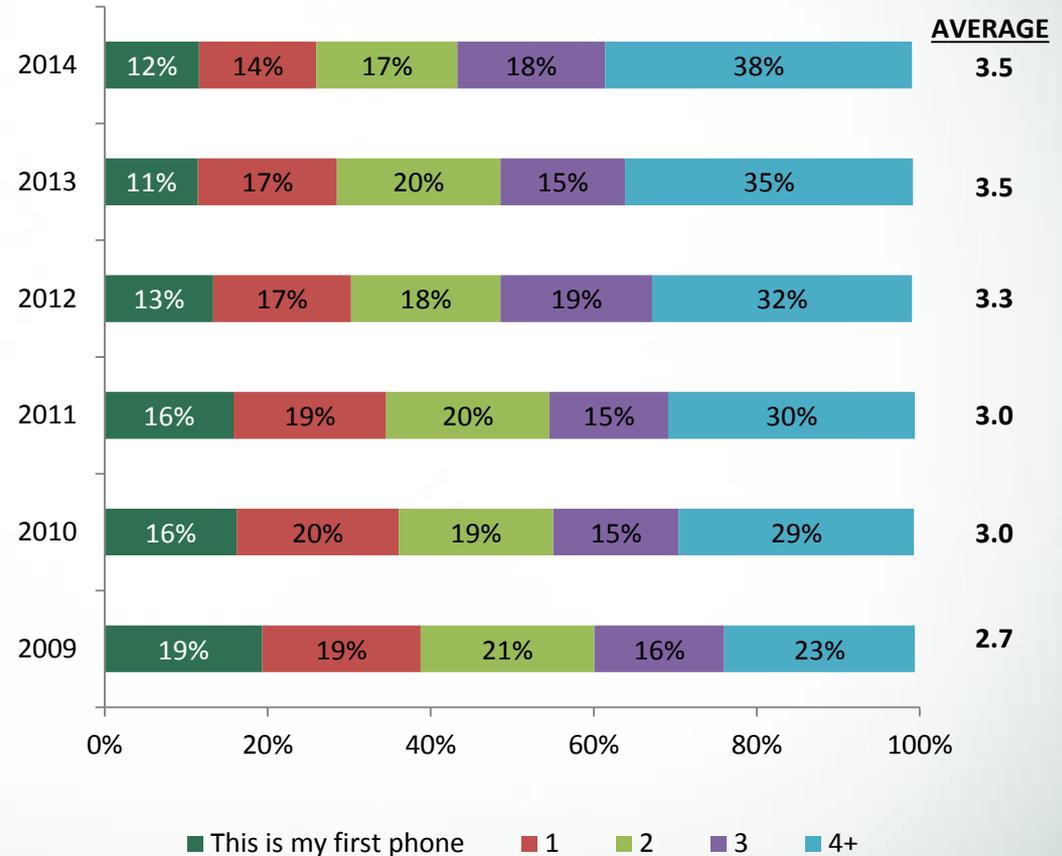
TOP 7 RESPONSES	Total	Region		Age			Gender	
		Urban	Rural	18-34	35-54	55+	M	F
Provider offered new cell phone with offer/package/contract	21%	20%	22%	<u>25%</u>	<u>22%</u>	16%	22%	19%
I wanted a newer model / new capabilities / features	19%	19%	18%	20%	19%	19%	<u>22%</u>	17%
I didn't know that was an option / I didn't think about it	18%	17%	21%	14%	18%	<u>21%</u>	16%	19%
I wanted a new phone / I didn't want one (general)	8%	7%	8%	7%	8%	8%	8%	7%
I only ever buy new electronics	7%	8%	6%	6%	7%	8%	8%	7%
That was not an option where I bought my phone / It wasn't offered to me / I didn't have the opportunity	7%	7%	6%	7%	7%	6%	7%	6%
I don't trust the phones / concerned about quality	7%	7%	4%	5%	6%	8%	7%	6%

Note: Significantly different numbers are underlined

Prior Cell Phone Ownership

– by year

- Canadians have owned on average 3 to 4 cell phones prior to their current one. The average usage of the previous phone is 27 months (over 2 years). Slowly, this average has decreased since 2011 when the average reported was 31 months. The average usage of the current phone is 21 months (nearly 2 years).
- While results are similar to those reported last year, overall there is a growing trend in the experience Canadians have with cell phone ownership. Only 12% are first-time owners (compared to 19% in 2009) and nearly two fifths are saying they have personally owned at least four cell phones prior to their current one.



Prior Cell Phone Ownership

– by province

- Just as current cell phone ownership is generally higher west of Québec, the same seems to apply to ownership experience.
- New Brunswick and Quebec residents are the most likely to say their current phone is their first one (15% and 18% respectively).
- Ontario and Alberta residents are the most likely to say they have owned at least 4 phones previously (41% and 44% respectively).

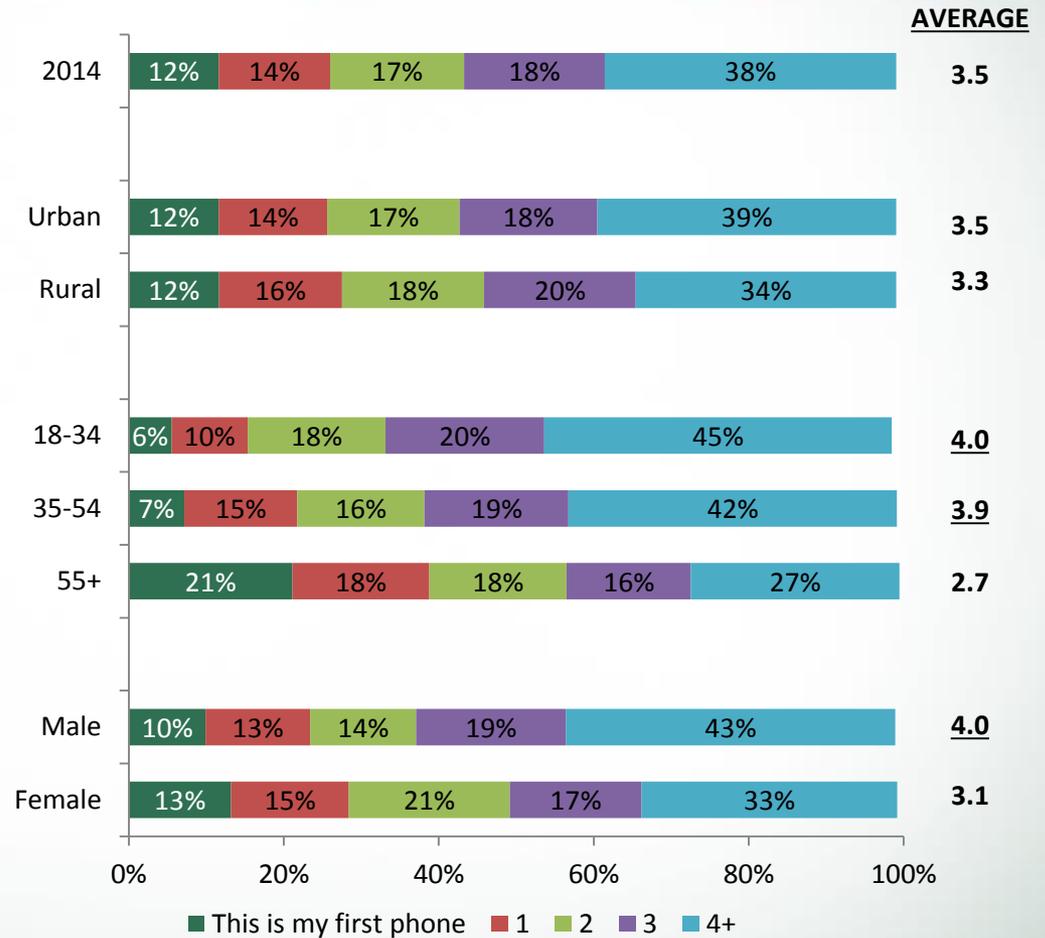


Note: Significantly different numbers are underlined

Prior Cell Phone Ownership

– by demographic

- Clearly, the adoption of cell phones is highly related to age, gender and urban/rural residency.
- Older Canadians are more likely to say this is their first cell phone (21%), compared to younger respondents (6%). Additionally, nearly half of those under 35 have owned at least 4 phones, while just over a quarter of those over 55 have had that number of phones.
- Men are more likely than women to say they have had at least 4 cell phones before their current one (43% vs. 33%).
- Smartphone owners are more likely to have owned at least 4 phones compared to regular cell phone owners (47% vs. 17%).



Note: Significantly different numbers are underlined

Cell Phone Usage

– by province and demographic

- Residents of Quebec, PEI, Nova Scotia, and Manitoba have used their current cell phone for a longer time (at least 22 months), compared to Ontario residents (19 months).
- Canadians at least 35 years old are more likely to have used their previous and current phone for a longer time, compared to younger Canadians. In fact, those at least 55 years old used their previous cell phone nine months longer than those who are 18 to 34, and they have used their current phone for a full year longer than the youngest group.

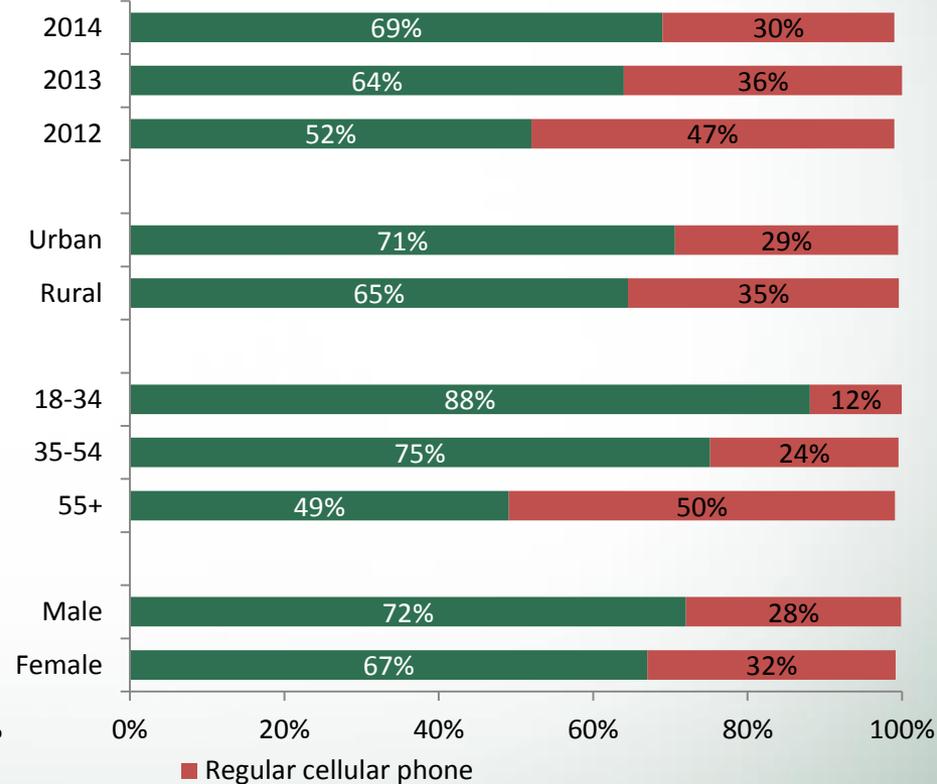
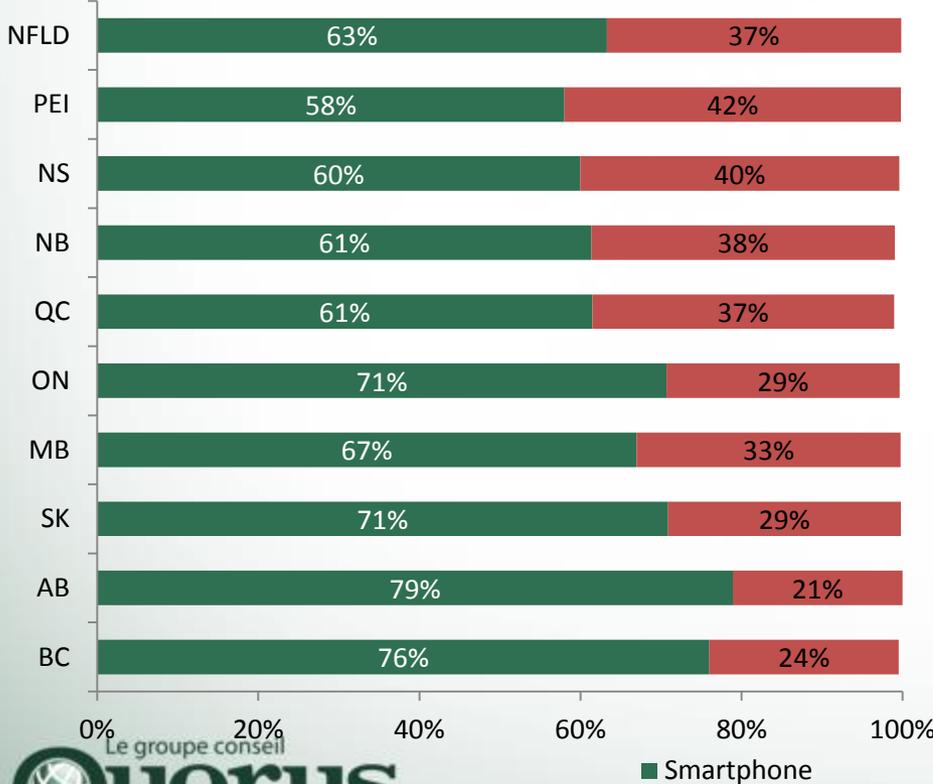
OWNERSHIP: AVERAGE IN MONTHS	Total	Province									
		NFLD	PEI	NS	NB	QC	ON	MB	SK	AB	BC
Prior cell phone	27.2	<u>30.9</u>	<u>30.1</u>	<u>30.9</u>	<u>31.0</u>	23.6	<u>27.6</u>	<u>30.4</u>	<u>28.4</u>	<u>28.0</u>	<u>27.9</u>
Current cell phone	21.0	20.6	<u>24.8</u>	<u>24.1</u>	20.4	<u>25.6</u>	18.8	<u>22.4</u>	21.0	19.1	19.9

OWNERSHIP: AVERAGE IN MONTHS	Total	Region		Age			Gender	
		Urban	Rural	18-34	35-54	55+	M	F
Prior cell phone	27.2	27.1	27.7	22.5	<u>27.2</u>	<u>31.4</u>	25.9	28.4
Current cell phone	21.0	21.0	21.1	15.4	<u>18.9</u>	<u>27.5</u>	20.5	21.4

Note: Significantly different numbers are underlined

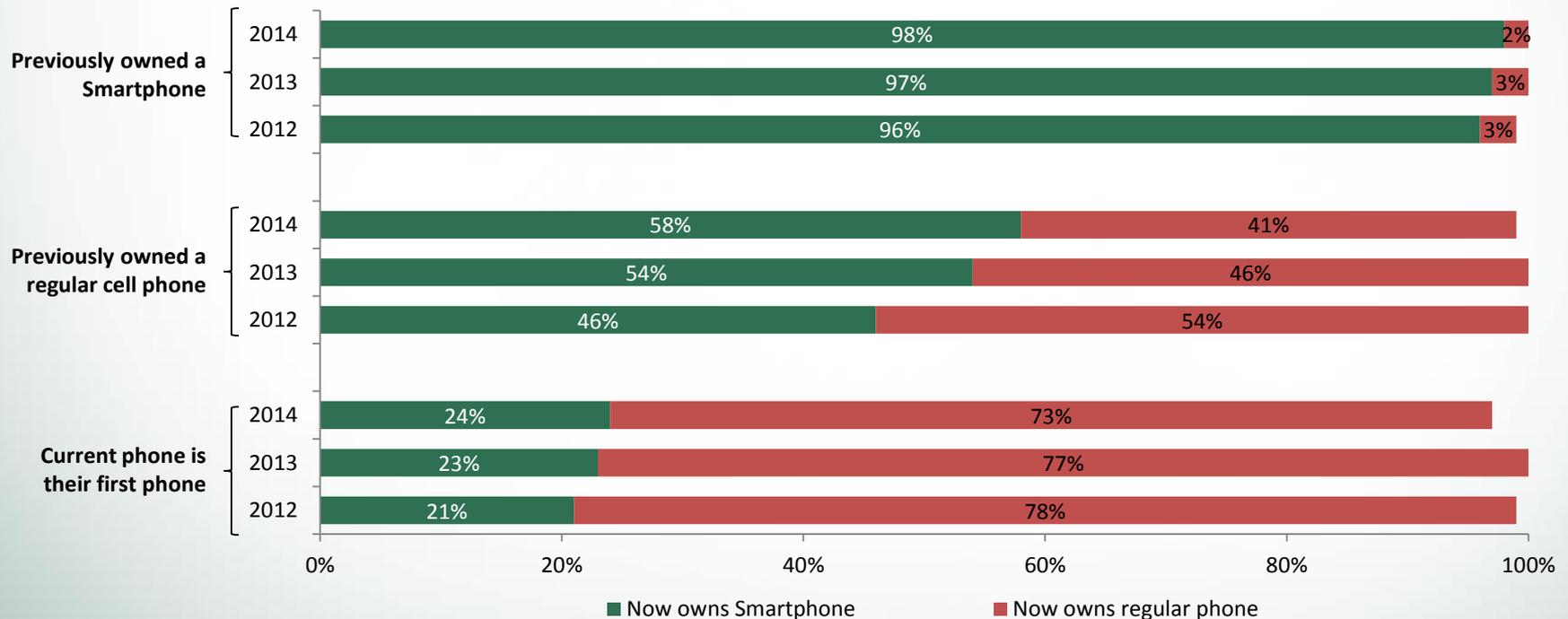
Type of Cell Phones Owned

- Over two thirds of Canadians with a cell phone report having a Smartphone in 2014 (69%), a significantly increasing trend from 2012 (52%). This is perhaps not totally surprising since the offer from cellular service providers is largely based on Smartphones.
- At least 7 in 10 cell phone owners in Alberta, British Columbia, Ontario and Saskatchewan use Smartphones, while two thirds or less of cell phone owners in other provinces do. Men are more likely than women to have Smartphones (72% vs. 67%), as well as those living in urban areas (71% vs. 65% in rural areas). The younger Canadians are, the more likely they are to have a Smartphone rather than a regular feature cell phone (88% among the 18 to 34 age group vs. 49% among those at least 55 years old).



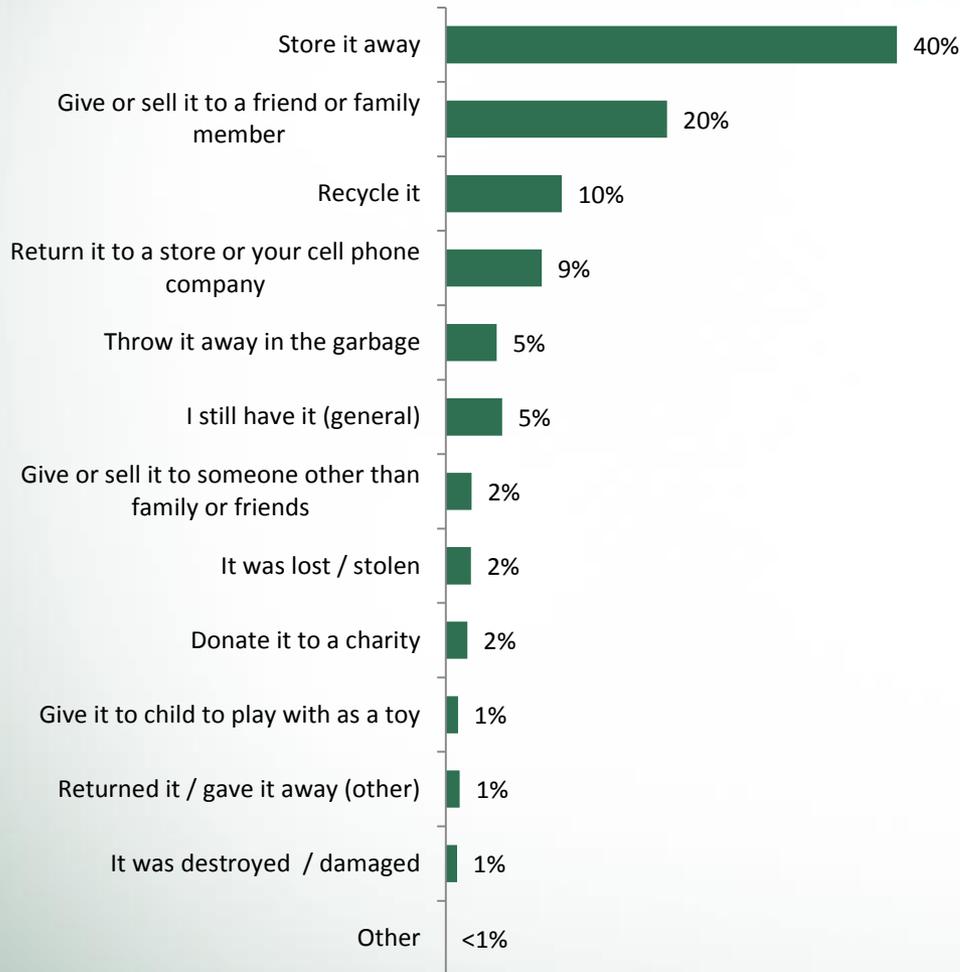
Change in Type of Phone

- Over half (57%) of respondents who owned a cell phone previously say it was a regular feature phone, while the remaining 43% had a Smartphone. The strong trend to switch to Smartphones is also clearly observed in the graph below. Virtually all respondents (98%) who previously owned a Smartphone continue to have this type of phone. Among those whose previous cell phone was a regular feature phone, nearly 3 in 5 (58%) have upgraded to a Smartphone. Nearly one quarter (24%) of those new to owning a cell phone have a Smartphone, while over three quarters were initiated to cellular phones with a regular feature phone (73%).



Cell Phone Disposal Method

Previous Cell Phone: Storage vs. Disposal



- Two in five cell phone owners (40%) have stored their old cell phones since obtaining their newest phone.
- Another half (50%) say they disposed their old phone in several other ways, mainly by giving or selling it to family, friends or other people (20%), recycling it (10%), or returning it to a store or their cell phone service provider (9%).
- As shown later in this report, over six in ten Canadians (63%) who stored away their old cell phones are unaware of cell phone recycling programs.

Previous Cell Phone: Storage vs. Disposal

– by year

- Nearly 2 in 5 respondents have either recycled their old cell phone, or took it to a retail store or cell phone company, which are the main outlets for the Recycle My Cell program.
- Consumer behaviour regarding their old cell phone status has remained consistent overall in the last 3 years.

After receiving your current cell phone, what did you do with your old one? Did you...	Year					
	2014	2013	2012	2011	2010	2009
Store it away	40%	42%	41%	<u>43%</u>	39%	39%
Give or sell it to a friend or family member	20%	20%	19%	18%	19%	<u>23%</u>
Recycle it	10%	10%	12%	<u>14%</u>	12%	11%
Return it to a store or your cell phone company	9%	9%	7%	9%	9%	<u>10%</u>
Throw it away in the garbage	5%	5%	5%	5%	5%	6%
I still have it (general)	5%	<u>3%</u>	3%	2%	2%	-
Give or sell it to someone other than family/friend	<u>2%</u>	<u>2%</u>	<u>2%</u>	<1%	<1%	-
It was lost / stolen	2%	2%	3%	3%	<u>4%</u>	3%
Donated to a charity	2%	2%	<u>3%</u>	2%	<u>3%</u>	<u>4%</u>

Note: Significantly different numbers are underlined

Previous Cell Phone: Storage vs. Disposal

– by province

- Residents of British Columbia are the most likely to recycle their old phone.
- The practice of returning the old phone to a retail store or a cell phone company is higher among PEI and Saskatchewan residents.
- PEI residents are also the most likely to say their phone was lost or stolen.
- Newfoundland residents are more likely than those in a variety of other provinces to say their phone was thrown away in the garbage.

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	40%	46%	44%	41%	47%	39%	40%	46%	43%	39%	43%
Give or sell it to a friend or family member	20%	18%	15%	18%	19%	19%	20%	14%	20%	<u>23%</u>	19%
Recycle it	10%	8%	7%	10%	11%	11%	8%	8%	11%	12%	<u>15%</u>
Return it to a store or your cell phone company	9%	7%	<u>12%</u>	8%	6%	10%	9%	6%	<u>11%</u>	9%	6%
Throw it away in the garbage	5%	<u>10%</u>	6%	6%	6%	4%	7%	<u>7%</u>	4%	4%	4%
I still have it (general)	5%	3%	2%	4%	3%	5%	<u>6%</u>	<u>6%</u>	3%	5%	3%
Give or sell it to someone other than family/friend	2%	3%	2%	3%	3%	3%	3%	3%	1%	1%	2%
It was lost / stolen	2%	1%	<u>6%</u>	2%	1%	3%	2%	3%	2%	2%	4%
Donated to a charity	2%	<1%	1%	<u>3%</u>	1%	1%	<u>2%</u>	1%	1%	<u>2%</u>	1%

Note: Significantly different numbers are underlined

Previous Cell Phone: Storage vs. Disposal

– by demographic

- The message of recycling used cell phones continues to resonate among older Canadians, who are at least twice as likely to either recycle their used phone (14%), or return it to a store or their cell phone company (13%), when compared to those 18 to 34 years old. The latter are 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	40%	40%	42%	40%	43%	38%	41%	40%
Give or sell it to a friend or family member	20%	19%	21%	<u>25%</u>	<u>21%</u>	13%	18%	21%
Recycle it	10%	10%	12%	7%	10%	<u>14%</u>	11%	10%
Return it to a store or your cell phone company	9%	<u>9%</u>	6%	7%	6%	<u>13%</u>	9%	9%
Throw it away in the garbage	5%	5%	7%	5%	4%	6%	6%	5%
I still have it (general)	5%	5%	6%	6%	5%	4%	<u>6%</u>	4%
Give or sell it to someone other than family/friend	2%	<u>3%</u>	1%	3%	3%	2%	3%	2%
It was lost / stolen	2%	2%	3%	3%	2%	3%	2%	3%
Donated to a charity	2%	2%	1%	1%	1%	<u>3%</u>	1%	<u>3%</u>

Note: Significantly different numbers are underlined

Previous Cell Phone: Storage vs. Disposal

- by length of ownership

- The perceived value of a previous cell phone may play a role in what cell phone owners do with it once they acquire a new device.
- Newer phones, or those owned for less than 2 years, are more likely to be passed on to friends or family. Older phones, particularly those at least 4 years old are more likely to be recycled. This behaviour was observed in previous years.

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	38%	42%	41%	46%	43%
Give or sell it to a friend or family member	<u>20%</u>	<u>22%</u>	<u>20%</u>	<u>19%</u>	9%
Recycle it	10%	9%	9%	9%	16%
Return it to a store or your cell phone company	8%	9%	11%	7%	11%
Throw it away in the garbage	6%	4%	4%	7%	5%
I still have it (general)	<u>7%</u>	3%	5%	6%	3%
Give or sell it to someone other than family/friend	3%	2%	2%	2%	2%
It was lost / stolen	3%	3%	2%	<1%	3%
Donated to a charity	1%	2%	1%	1%	<u>4%</u>

Note: Significantly different numbers are underlined

Previous Cell Phone: Storage vs. Disposal

- by type of phone

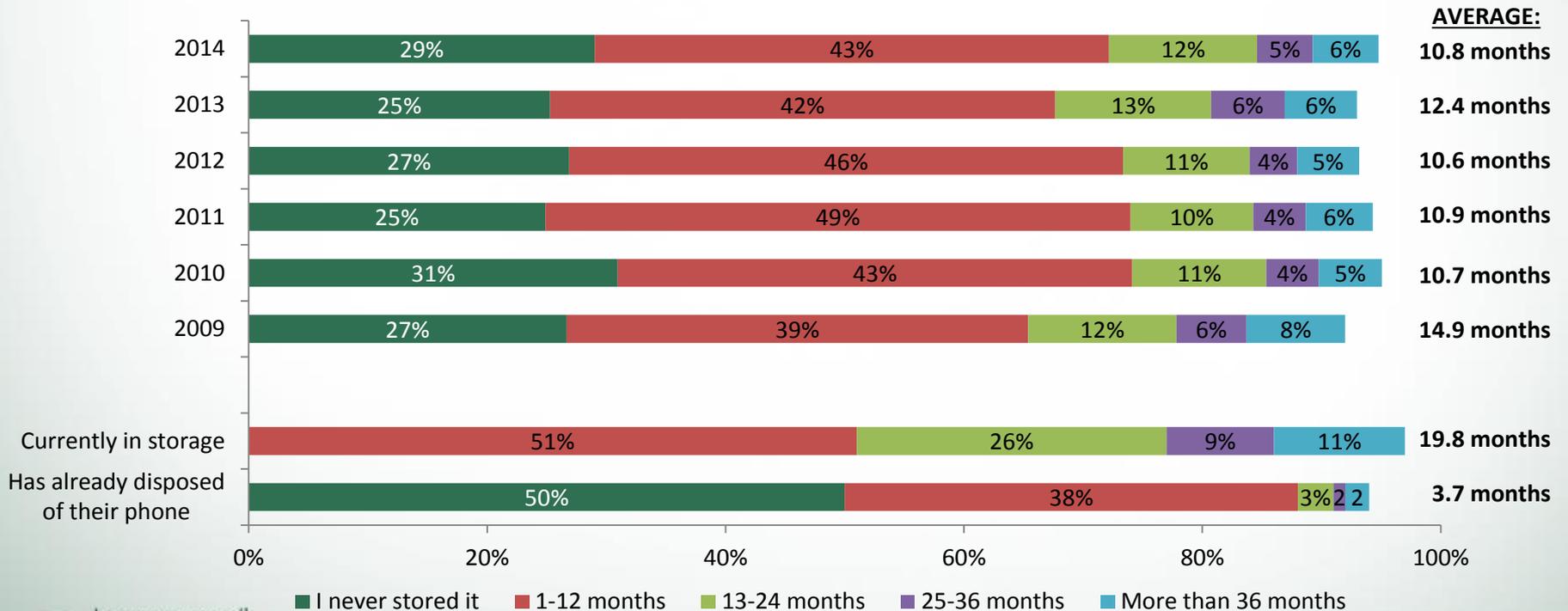
- The type of phone previously owned also seems to play a role in that phone's fate. Those who previously owned a Smartphone see more value in their phones and are more likely to give or sell it to either family members or friends (29%) or strangers (4%), compared to those who had a regular phone. The latter are more likely to store it (43%) or recycle it (14%).

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	37%	<u>43%</u>
Give or sell it to a friend or family member	<u>29%</u>	13%
Recycle it	5%	<u>14%</u>
Return it to a store or your cell phone company	9%	8%
Throw it away in the garbage	3%	7%
I still have it (general)	6%	5%
Give or sell it to someone other than family/friend	<u>4%</u>	1%
It was lost / stolen	2%	2%
Donated to a charity	1%	<u>3%</u>

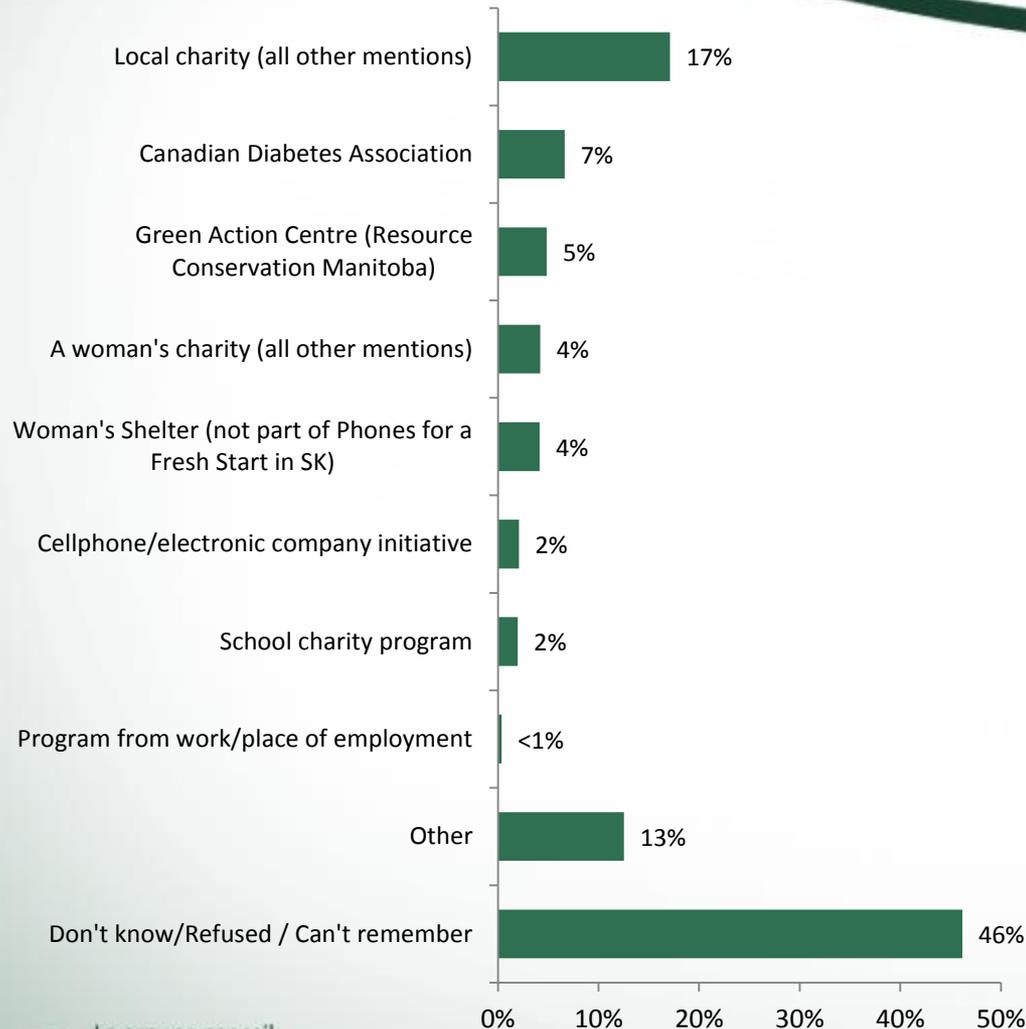
Note: Significantly different numbers are underlined

Storage Period

- The average time people have stored their old cell phones is eleven months. Among the 43% of cell phone owners who currently have their previous cell phone in storage, it has been there, on average, for 20 months, while those who disposed of their old phone stored it for an average of 4 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 (13 vs. 8 months).



Donation Programs Used



- The most common approach for cell phone donation is through a local charity (17%), followed by the Canadian Diabetes Association (7%), the Green Action Centre (5%), a woman's charity (4%), and a woman's shelter (4%).
- Many cannot remember the charity to which they donated their cell phone (46%).
- Given the small sample size (n=50), this data is not analyzed by province or by any of the demographic variables as it may not be representative of the population.

Donation Programs Used

- Small sample sizes from year to year also explain the variations in the results with previous years. However, these top-five mentions have been common over the years.

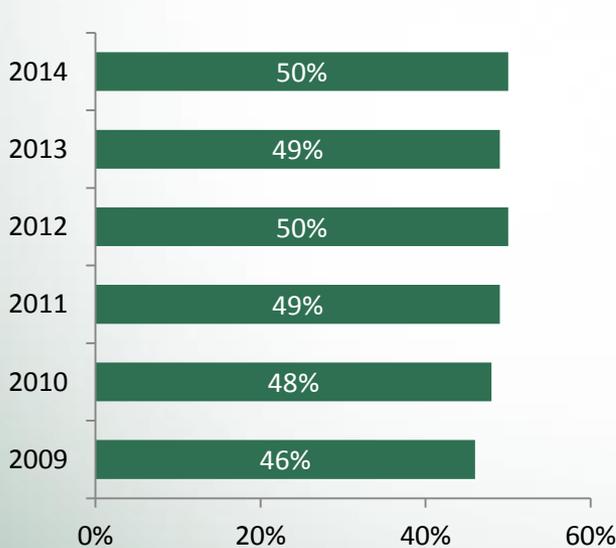
Cell Phone Donations (Top-5 mentions)	Year					
	2014	2013	2012	2011	2010	2009
Local charity (all other mentions)	17%	<u>24%</u>	14%	<u>34%</u>	12%	3%
Canadian Diabetes Association	7%	1%	0%	1%	<u>16%</u>	5%
Green Action Centre (Resource Conservation Manitoba)	5%	-	-	-	-	-
A woman's charity (all other mentions)	4%	<u>18%</u>	9%	2%	1%	-
Woman's Shelter (not part of Phones for a Fresh Start in SK)	4%	23%	<u>22%</u>	10%	5%	18%

Note: Significantly different numbers are underlined

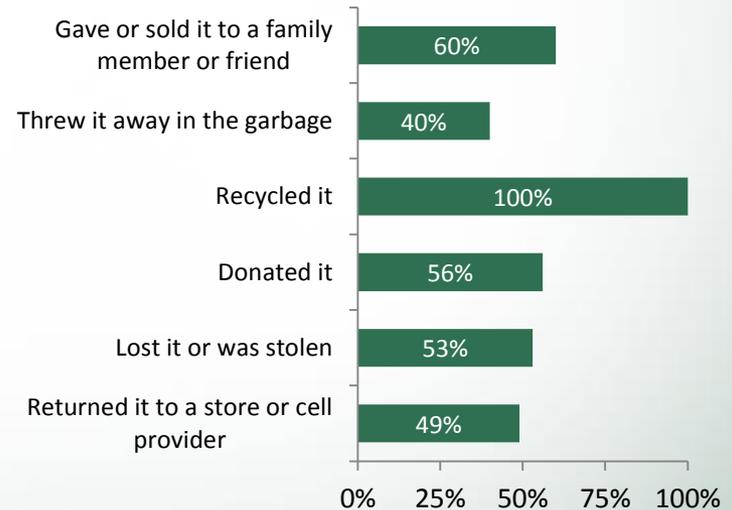
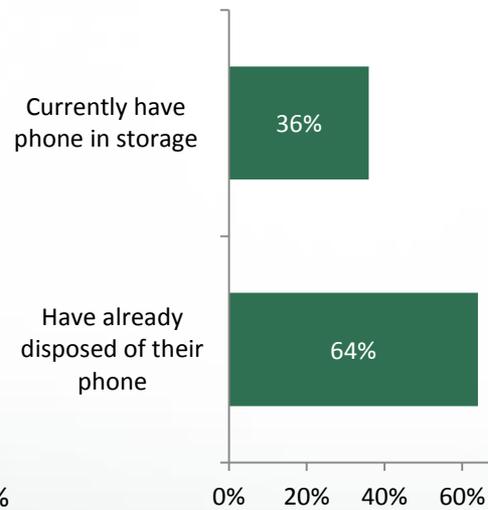
Awareness of Cell Phone Recycling

General Awareness of Recycling Programs

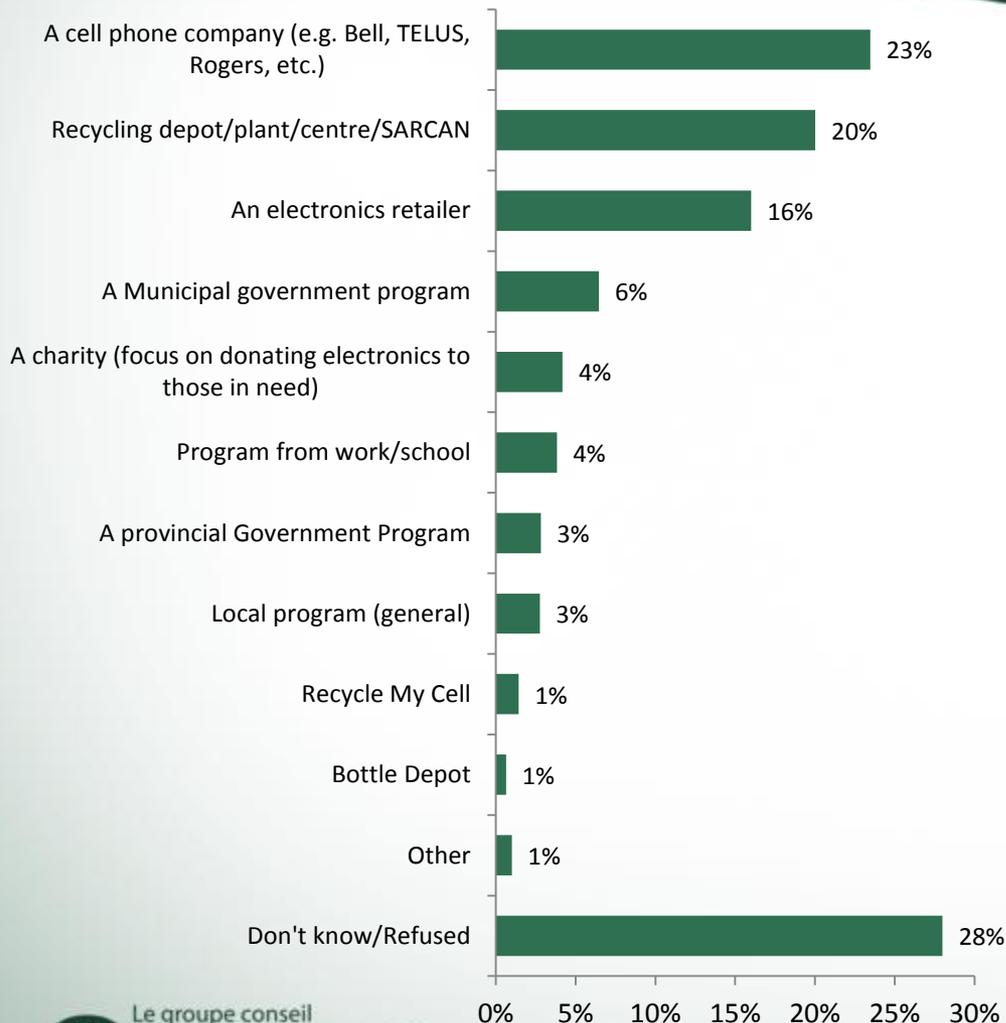
- Awareness of recycling programs for unused cell phones has remained stable since 2010. Generally, half of respondents (50%) are aware of recycling programs for unused phones.
- Across the provinces, awareness is particularly low among respondents in Newfoundland (45%), PEI (44%), New Brunswick (43%), Quebec (44%), and Manitoba (44%), while particularly high in BC (56%) and Saskatchewan (57%).
- Among those who currently have their phone in storage, 36% say they are aware of recycling programs for cell phones. Awareness is higher among those who have already disposed of their phone (64%).
- About 40% of those who threw their phones in the garbage are also aware of recycling programs, although it should be noted that awareness of the programs may have occurred *after* they threw their phones away.



Awareness of recycling programs among those who:



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 (23%) recognize Recycle My Cell partners offering a recycling program.
- Other important mentions are recycling depots (20%), and electronics retailers (16%).
- Over one quarter of respondents who say they are aware of recycling programs could not name a specific one.

Unaided Awareness of Specific Programs

- by year

- Recycling depots have become better known in the last year as an option to recycle old cell phones.
- In 2014, 20% of those who say they are aware of cell phone recycling programs also say they are aware of recycling depots, compared to under 10% reported in previous years.

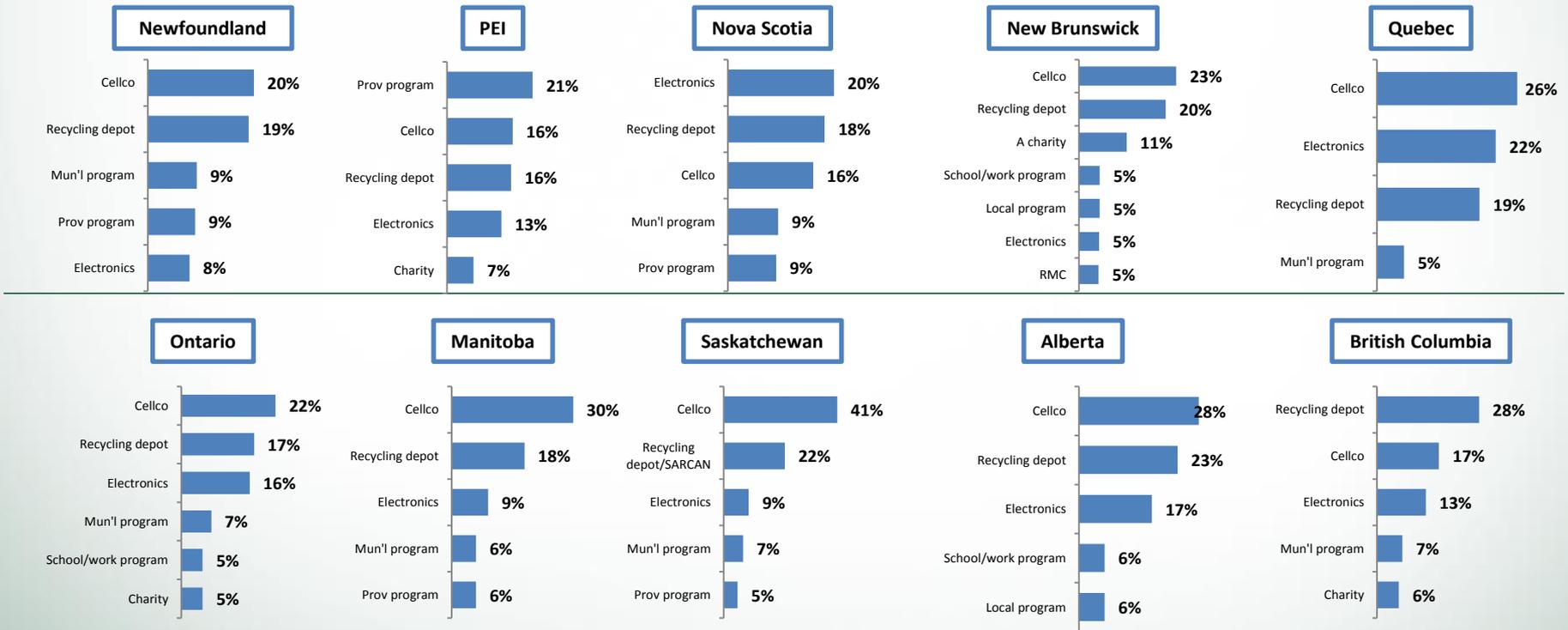
Top-6 Mentions	Year					
	2014	2013	2012	2011	2010	2009
A cell phone company (e.g. Bell, TELUS, Rogers, etc.)	23%	23%	21%	<u>27%</u>	<u>25%</u>	<u>29%</u>
Recycling depot/plant/centre/SARCAN	<u>20%</u>	<u>8%</u>	<u>4%</u>	<u>7%</u>	<u>4%</u>	1%
An electronics retailer	16%	<u>18%</u>	14%	15%	17%	13%
A Municipal government program	6%	<u>8%</u>	<u>9%</u>	5%	7%	7%
A charity (focus on donating electronics to those in need)	4%	4%	<u>8%</u>	3%	5%	<u>6%</u>
Program from work/school	4%	4%	5%	4%	<u>7%</u>	4%

Note: Significantly different numbers are underlined

Unaided Awareness of Specific Programs

- by province

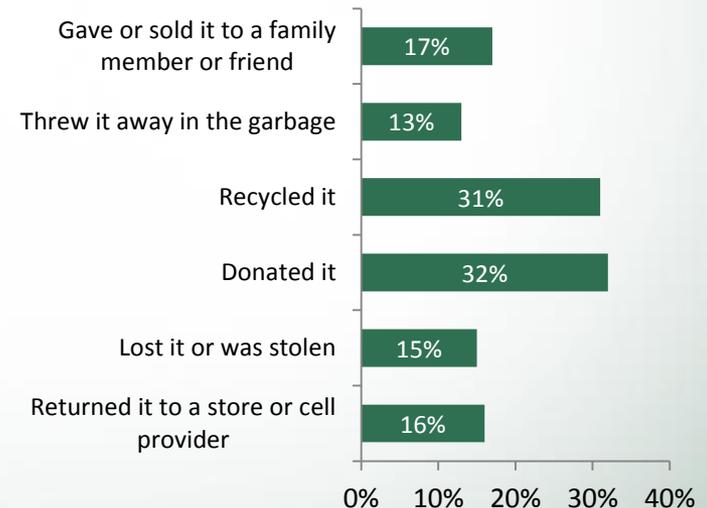
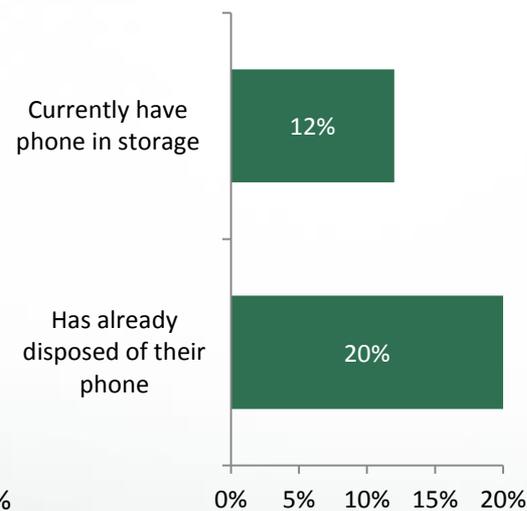
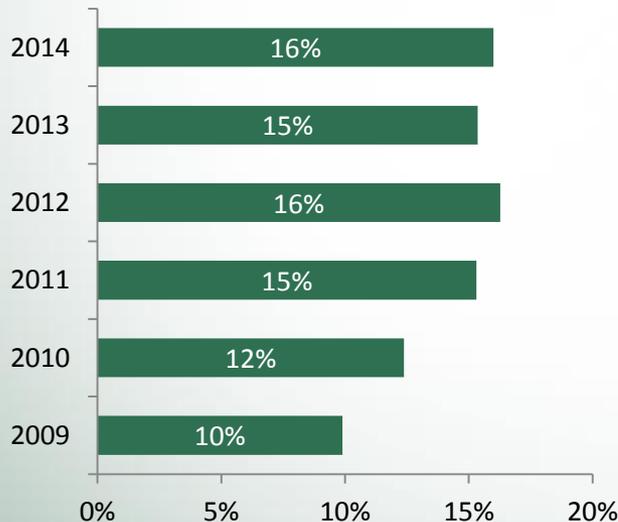
- Awareness of the various programs differs from province to province. Cell phone companies are well known across Canada, especially in Saskatchewan and Manitoba. Recycling depots are among the first 2 options in most provinces, in fact, it is the number one remembered recycling place/program in British Columbia. Electronic retailers are well known particularly in Nova Scotia, Alberta, Quebec, and Ontario.



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, although it has remained stable in the last 4 years.
- Recycle My Cell awareness is highest in Newfoundland (24%), Quebec (22%), and Saskatchewan (21%), and is lowest in British Columbia (11%).
- Among those who currently have their cell phone in storage, 12% are aware of the Recycle My Cell program. As well, 20% of those who have already disposed of their phone are aware of RMC.
- Nearly one third of those who recycled their previous cell phone are aware of RMC (31%).

Awareness of the RMC among those who:



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%	45%	44%	51%	43%	44%	<u>53%</u>	44%	<u>57%</u>	48%	<u>56%</u>
Recycle My Cell – prompted + unprompted	16%	<u>24%</u>	<u>19%</u>	14%	<u>17%</u>	<u>22%</u>	14%	<u>17%</u>	<u>21%</u>	14%	11%

% AWARE	Total	Region		Age			Gender	
		Urban	Rural	18-34	35-54	55+	M	F
Recycling programs in general	50%	50%	47%	47%	<u>54%</u>	48%	52%	48%
Recycle My Cell – prompted + unprompted	16%	16%	18%	15%	15%	18%	16%	16%

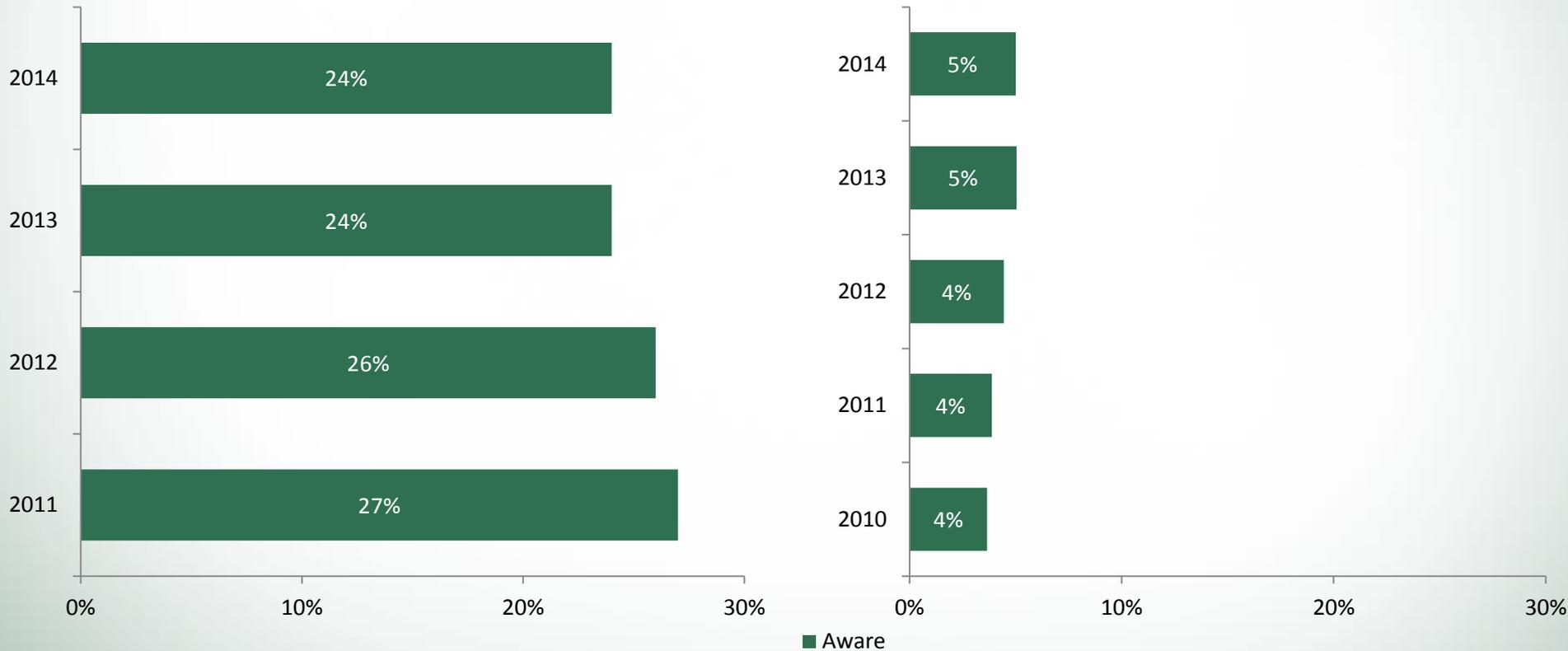
Note: Significantly different numbers are underlined

Question 13 Base Are you aware of any recycling programs for unused cell phones?
All Respondents, n=4,013 (question was not asked to those who previously said they recycled their phone, but this group was included in the base for this question)

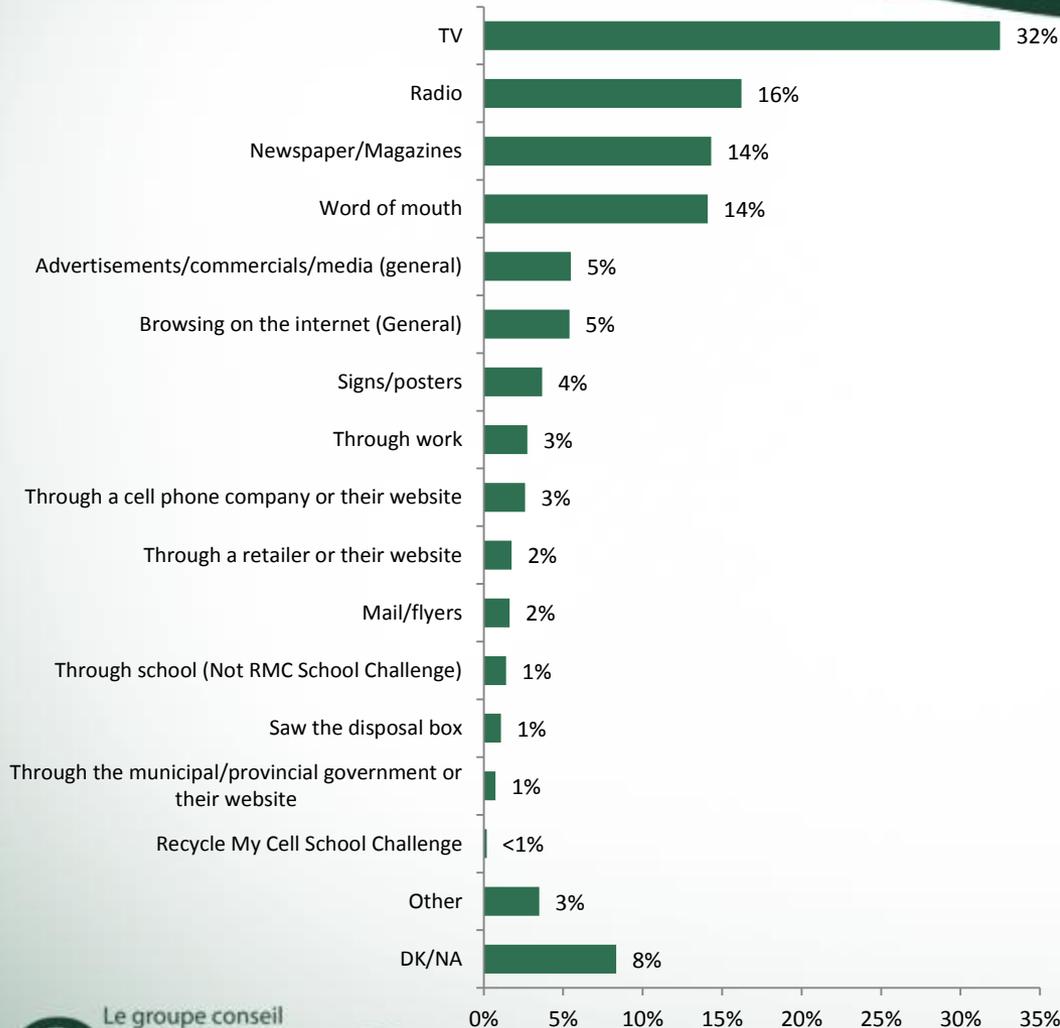
Question 15 Base Have you heard about the Recycle My Cell program?
All Respondents, n=4,013 (question was not asked to those who previously said they were aware of this program, but were included in the base for this question)

Awareness of Recycle My Cell Through Waste Reduction Week

- Nearly one quarter of respondents have heard of Waste Reduction Week. This is more likely to happen in Nova Scotia than in any other province. Only 5% of those aware of Waste Reduction Week (WRW) recalled RMC as one of its sponsors. Awareness is significantly higher in New Brunswick and British Columbia (12% and 11% respectively).



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% over the radio, and 14% through newspapers and magazines. Word of mouth also plays an important role promoting the RMC program (14%).
- Television is least likely to be mentioned by Ontario residents (14%), and most likely in Quebec (56%).
- Radio is more likely to be mentioned by Newfoundlanders (34%).
- Newspapers and magazines are more likely to be mentioned by residents of Nova Scotia (25%).
- Word of mouth is more likely to be mentioned by residents of Alberta (24%), Ontario (23%), and PEI (22%).

Recycle My Cell Awareness Channels

- by year

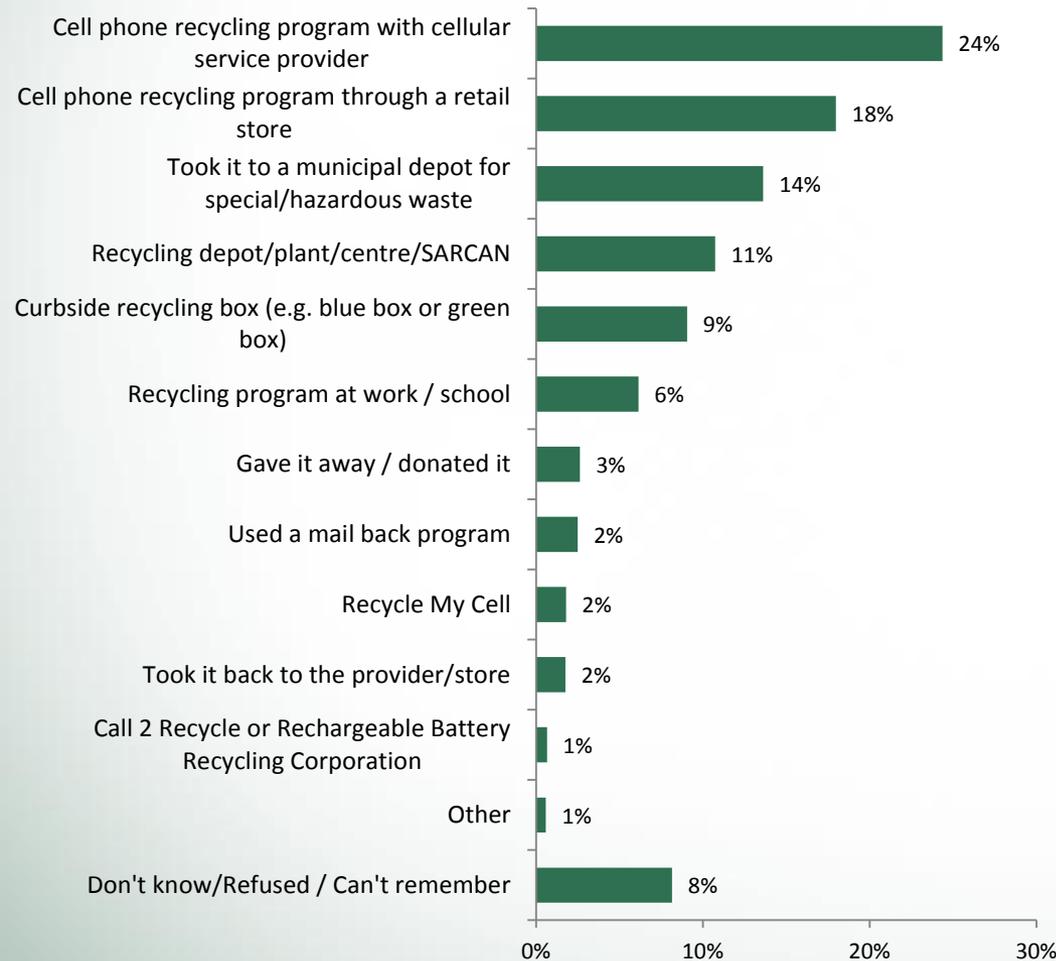
- While awareness through television has remained stable over the past few years, word of mouth has also been steadily climbing as a source since 2010.

Top-5 Mentions	Year				
	2014	2013	2012	2011	2010
TV	32%	32%	32%	33%	<u>42%</u>
Radio	16%	<u>21%</u>	13%	<u>22%</u>	<u>21%</u>
Newspaper/Magazines	14%	17%	16%	17%	17%
Word of mouth	<u>14%</u>	12%	10%	8%	7%
Advertisements/commercials/media (general)	<u>5%</u>	2%	<u>3%</u>	<1%	1%

Note: Significantly different numbers are underlined

Cell Phone Recycling

Approaches Used for Cell Phone Recycling



- The most common approaches to recycle old phones are the recycling programs led by cellular service providers (24%) and those through retail stores (18%).
 - Among the 85 respondents who mentioned a cellular service provider program, 20% were aware that these provider programs are part of the Recycle My Cell program.
- Other important approaches to recycling phones include Municipal depots (14%), recycling depots (11%), curbside recycling boxes (9%), and recycling programs at work or school (6%).

Approaches Used for Cell Phone Recycling

- Top responses by year

- While cellular service providers' programs are the most common approach to recycle used cell phones, there is a significant decrease in using this approach since 2011.
- As seen previously in the report, awareness of recycling depots is higher than in previous years, and similarly the use of these venues to recycle old phones is significantly higher this year compared to 2013.

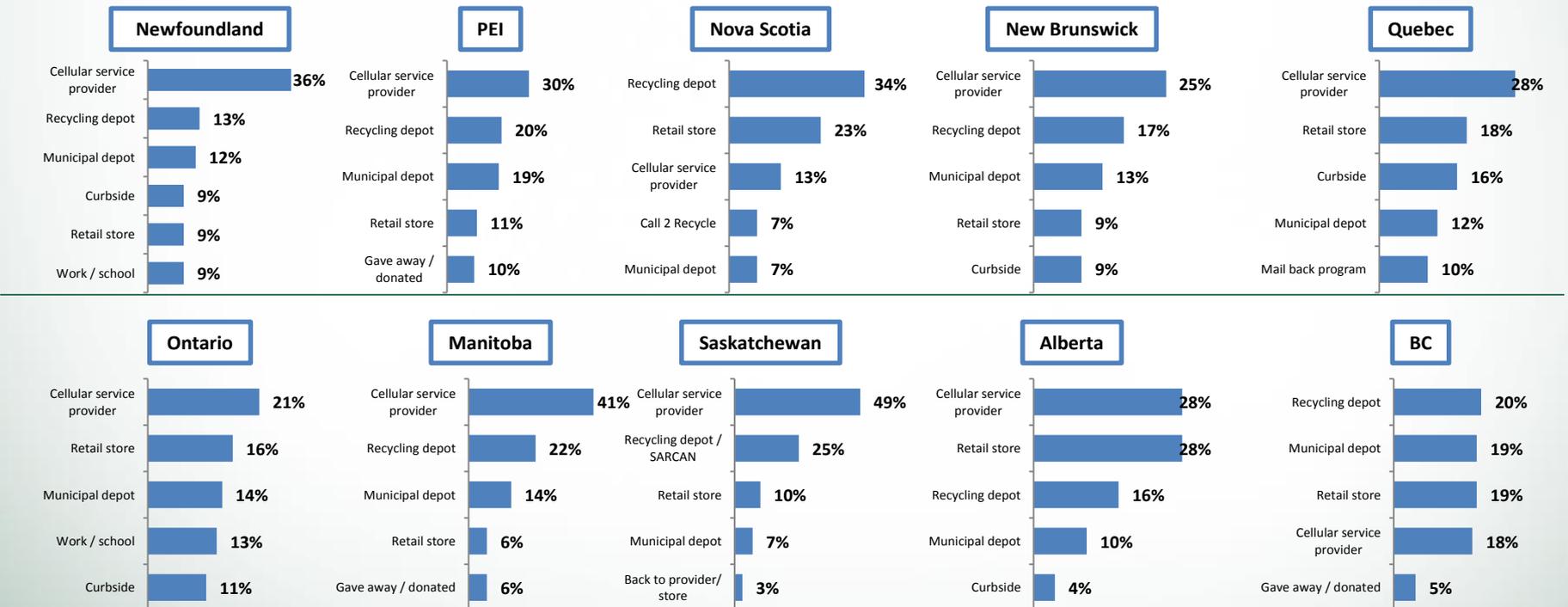
Top-5 Mentions	Year					
	2014	2013	2012	2011	2010	2009
Cell phone recycling program with cellular service provider	24%	25%	27%	<u>36%</u>	28%	35%
Cell phone recycling program through a retail store	18%	<u>24%</u>	17%	10%	13%	16%
Took it to a municipal depot for special/hazardous waste	14%	9%	10%	14%	11%	9%
Recycling depot / plant / centre / SARCAN	<u>11%</u>	4%	<u>13%</u>	<u>12%</u>	<u>10%</u>	4%
Curbside recycling box (e.g. blue box or green box)	9%	12%	8%	6%	8%	9%

Note: Significantly different numbers are underlined

Approaches Used for Cell Phone Recycling

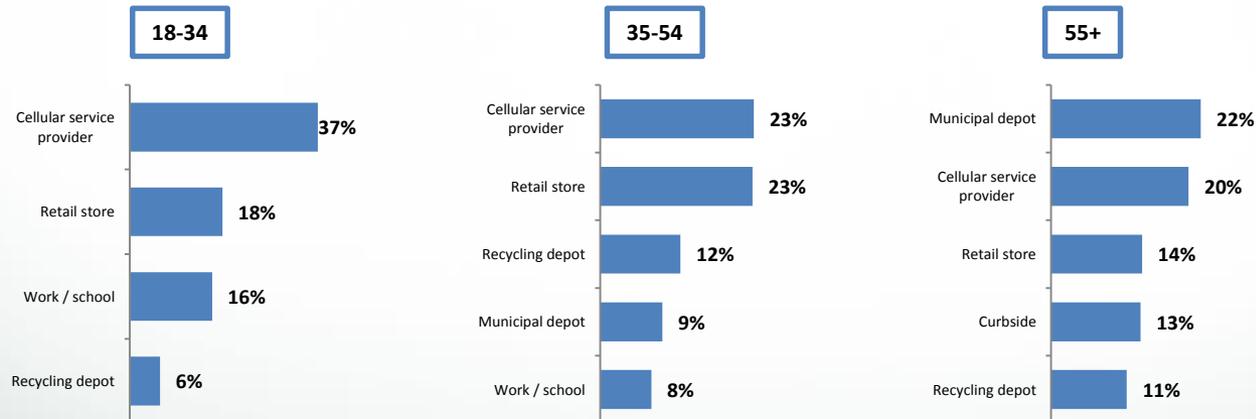
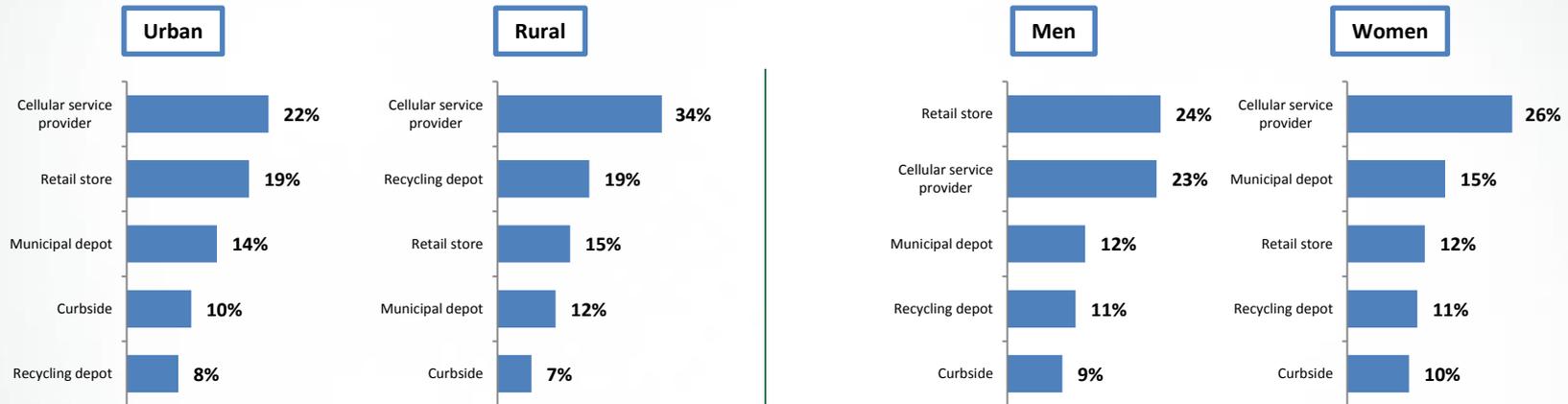
– Top responses by province

- 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.



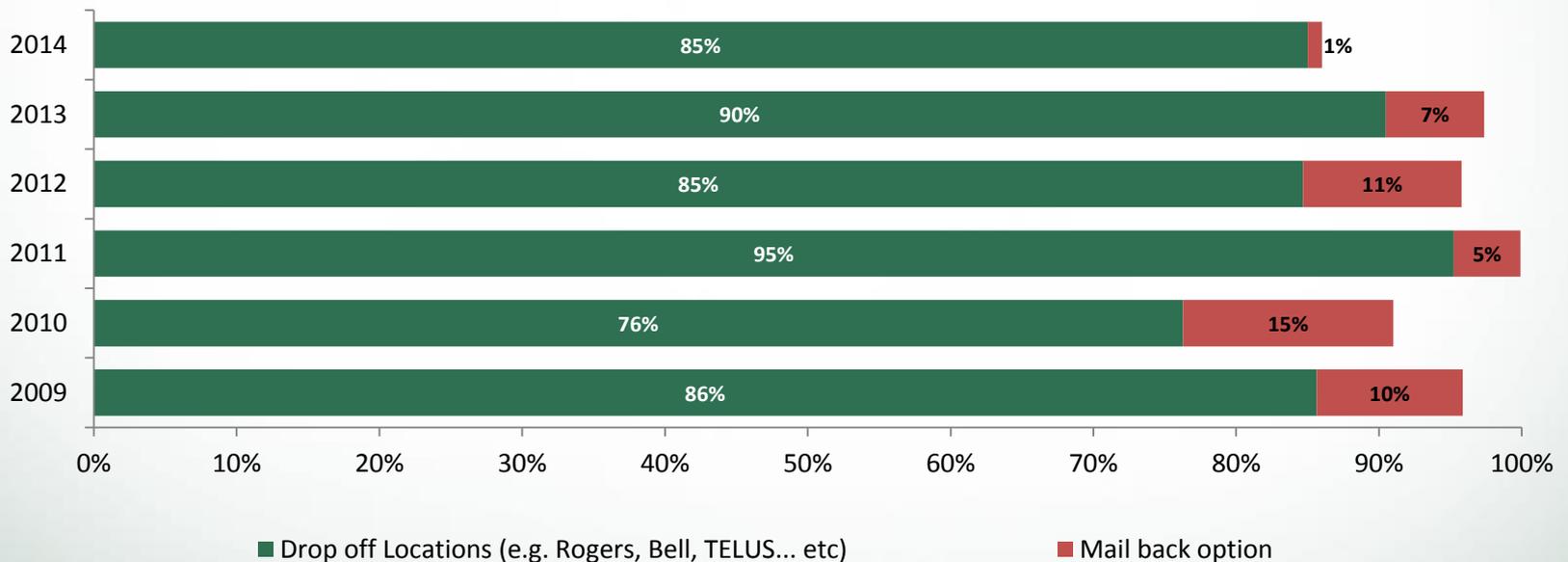
Approaches Used for Cell Phone Recycling

– Top responses by demographic



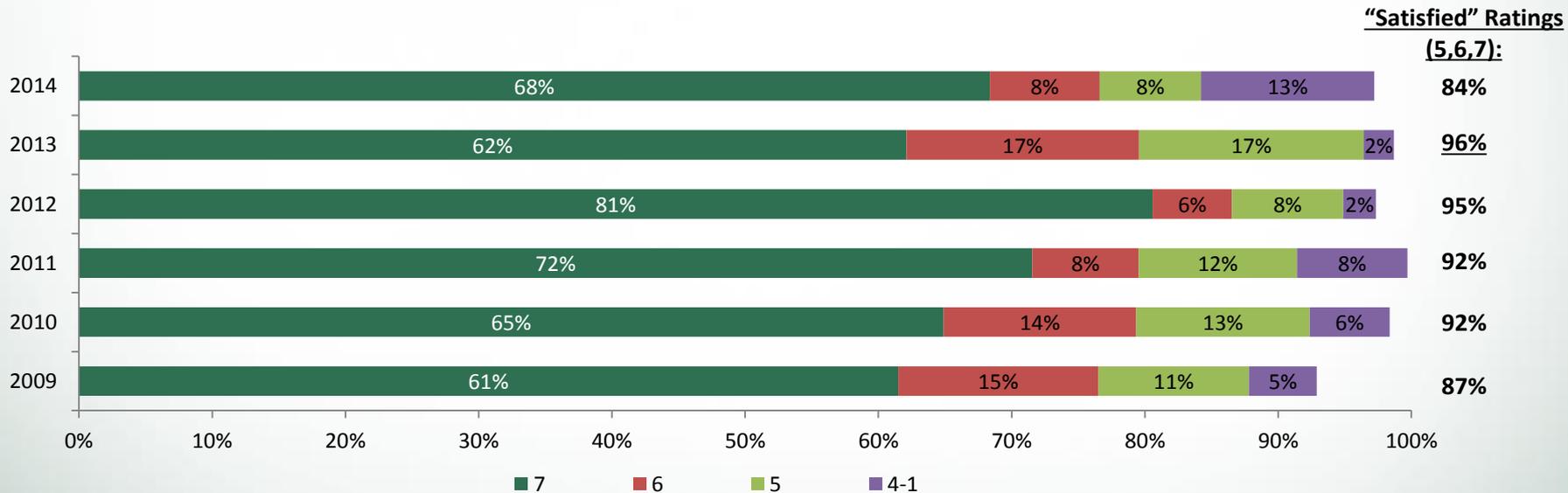
Mail-back vs. Drop-off Recycling

- 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 only 1% say they used the mail-back option.
- No other significant differences can be highlighted due to small sample sizes.



Satisfaction with Cell Recycling Experience

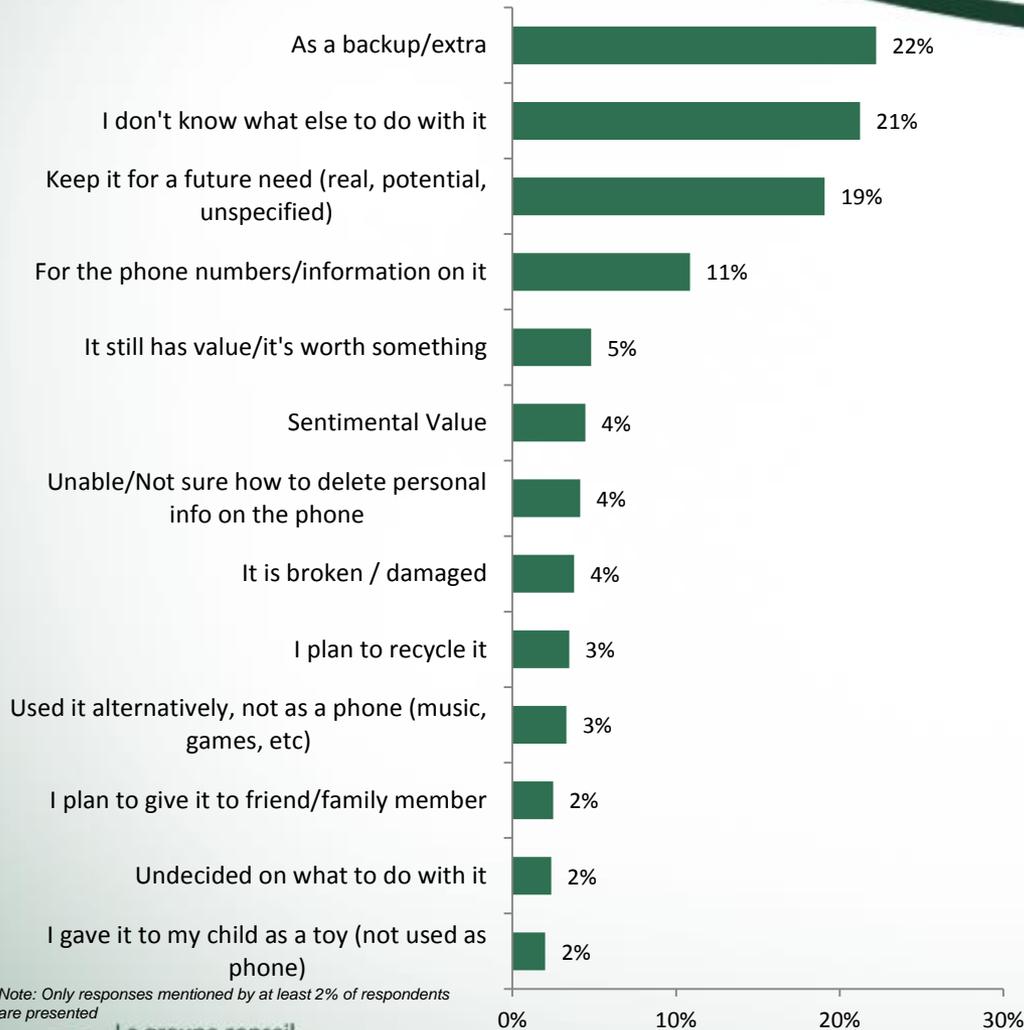
- The vast majority (84%) of those who recycled their phone through Recycle My Cell are satisfied with their cell recycling experience, giving at least a score of 5 on a 7-point scale. Although it appears to be a significantly lower satisfaction score than in previous years, this should not be alarming since the sample size is small and slight changes can have a big impact in the numbers presented.
- When respondents were asked to explain their rating, dissatisfied respondents felt there was not enough information, while satisfied respondents said they would have liked to have information that the phone is going to be recycled properly. No other differences can be highlighted due to small sample sizes.



Question 11a How satisfied were you with your cell phone recycling experience? Please use a scale from 1 to 7, where 1 is extremely dissatisfied and 7 is extremely satisfied.
 Base Respondents who currently own a cell phone and returned a previous cell phone through Recycle My Cell or a service provider recycling program, n=117

Question 11b Can you please explain this rating?
 Base Respondents who currently own a cell phone and returned a previous cell phone through Recycle My Cell or a service provider recycling program, and rated their recycling experience, n=114

Reasons for Not Recycling Prior Cell Phone



- In general, Canadians keep their phones since they still see they still see a use for it, either today or in the future. Old phones are still being used as a back-up (22%), for the phone numbers or information on it (11%), to listen to music and play games on it (3%), or as a toy for children (2%). Some simply keep it as they still see value in it (5%).
- Other respondents don't know (21%) or are undecided (2%) on what to do with the old phone.
- Some respondents have future plans for their old phone: they keep it for an unforeseen future situation (19%), or plan to recycle it (3%).
- A few others just keep their old phone for sentimental value (4%).
- As shown on the following slide, compared to previous years, respondents in 2014 are more likely to say they keep their phones to use them as back-ups, for a future need, for the information on them, or because they still see value in them.

Reasons for Not Recycling Prior Cell Phone

- by year and type of phone

- Those who previously had a Smartphone are more likely to say they keep it as a back-up (28%), and still see value in their old Smartphone (8%), compared to those who previously had a regular cell phone (18% and 2% respectively). The latter are more likely to say they don't know what else to do with their phone other than keeping it in storage (26% vs. 15%).
 - Respondents aware of recycling programs are more likely than those unaware of recycling programs to use it as a back-up or extra phone (27% vs. 19%). Respondents unaware of recycling programs are more likely than those aware of recycling programs to say they do not know what else to do with their old cell phone (25% vs. 16%).

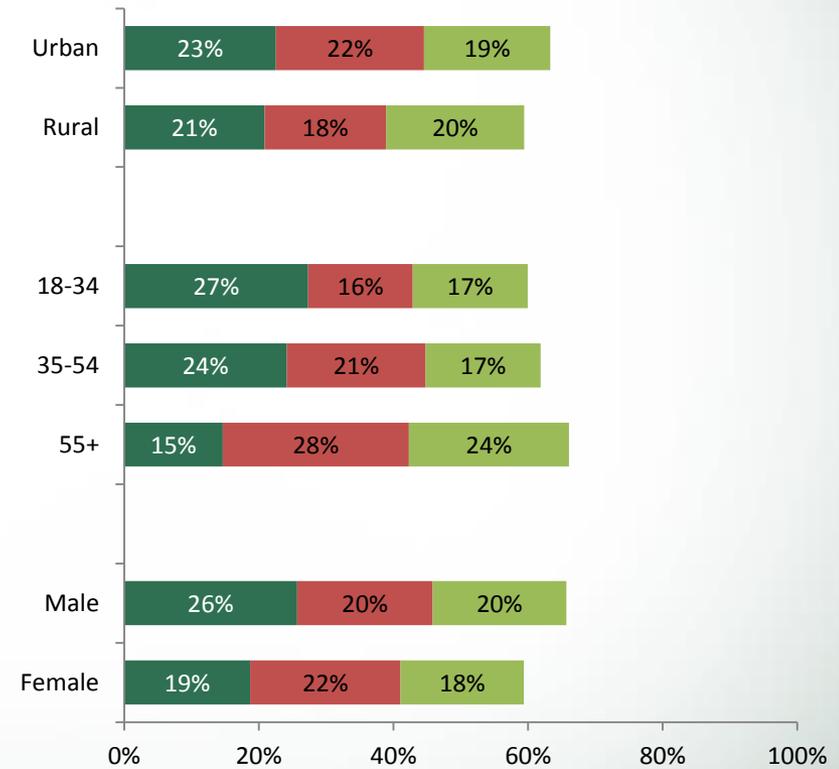
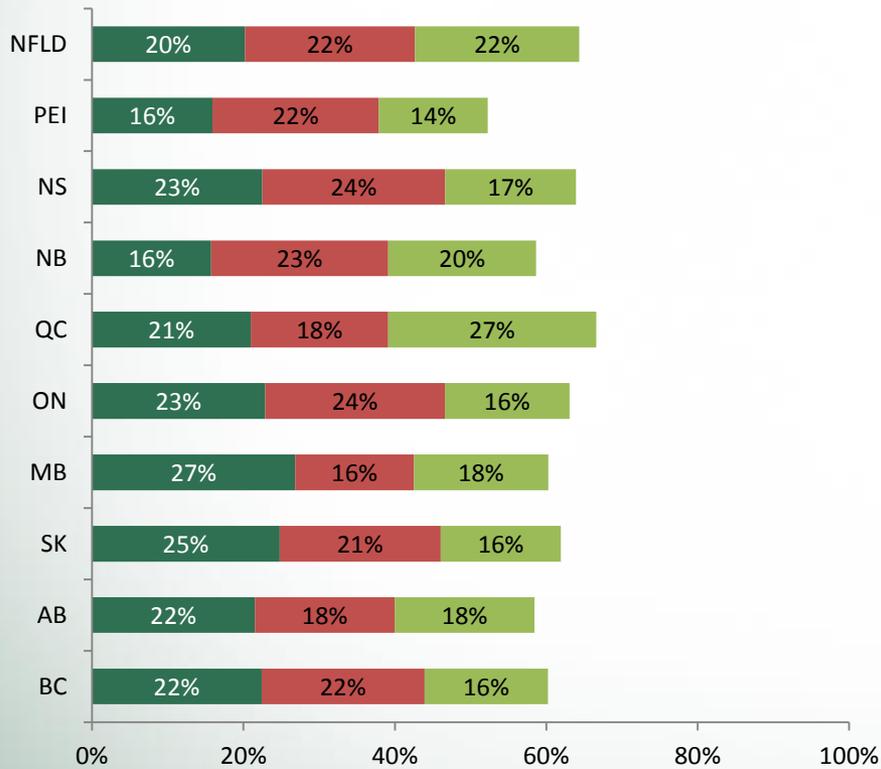
Top-5 Mentions	Year						Type of previous phone	
	2014	2013	2012	2011	2010	2009	Smartphone	Regular
As a backup/extra	<u>22%</u>	<u>21%</u>	18%	<u>25%</u>	20%	16%	<u>28%</u>	18%
I don't know what else to do with it	21%	21%	22%	<u>27%</u>	21%	26%	15%	<u>26%</u>
Keep it for a future need (real, potential, unspecified)	<u>19%</u>	13%	<u>15%</u>	13%	<u>15%</u>	10%	18%	20%
For the phone numbers/information on it	<u>11%</u>	<u>9%</u>	5%	<u>9%</u>	5%	5%	13%	10%
It still has value / it's worth something	<u>5%</u>	2%	3%	<u>5%</u>	4%	<u>5%</u>	<u>8%</u>	2%

Note: Significantly different numbers are underlined

Reasons for Not Recycling Prior Cell Phone

– Top 3 responses

- PEI and New Brunswick residents are the least likely to say they keep their old phone as a back-up (16% each) compared to residents from other provinces. Quebecers are the most likely to say they keep their phone for a future use. Respondents over 55 years old are more likely to say they do not know what to do with the old phone, compared to those between 18 and 54 years old (28% vs. 16%). The latter are more likely to keep their phone as a back-up (25% vs. 15%).

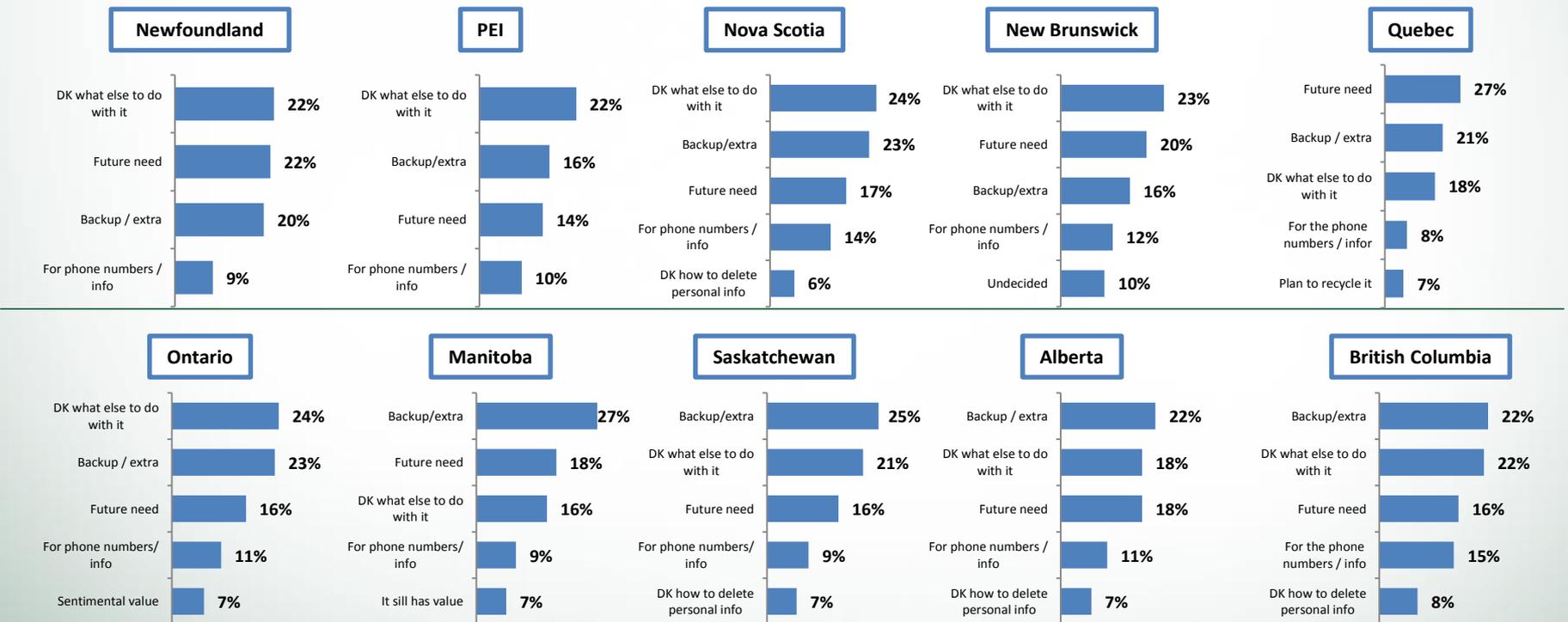


■ As a backup/extra ■ I don't know what else to do with it ■ Keep it for a future need (real, potential, unspecified)

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. Residents of the Atlantic Provinces and Ontario are more likely to say they did not know what to do with their old phone. Those in Manitoba, Saskatchewan, Alberta and British Columbia are more likely to say they keep it as a back-up.

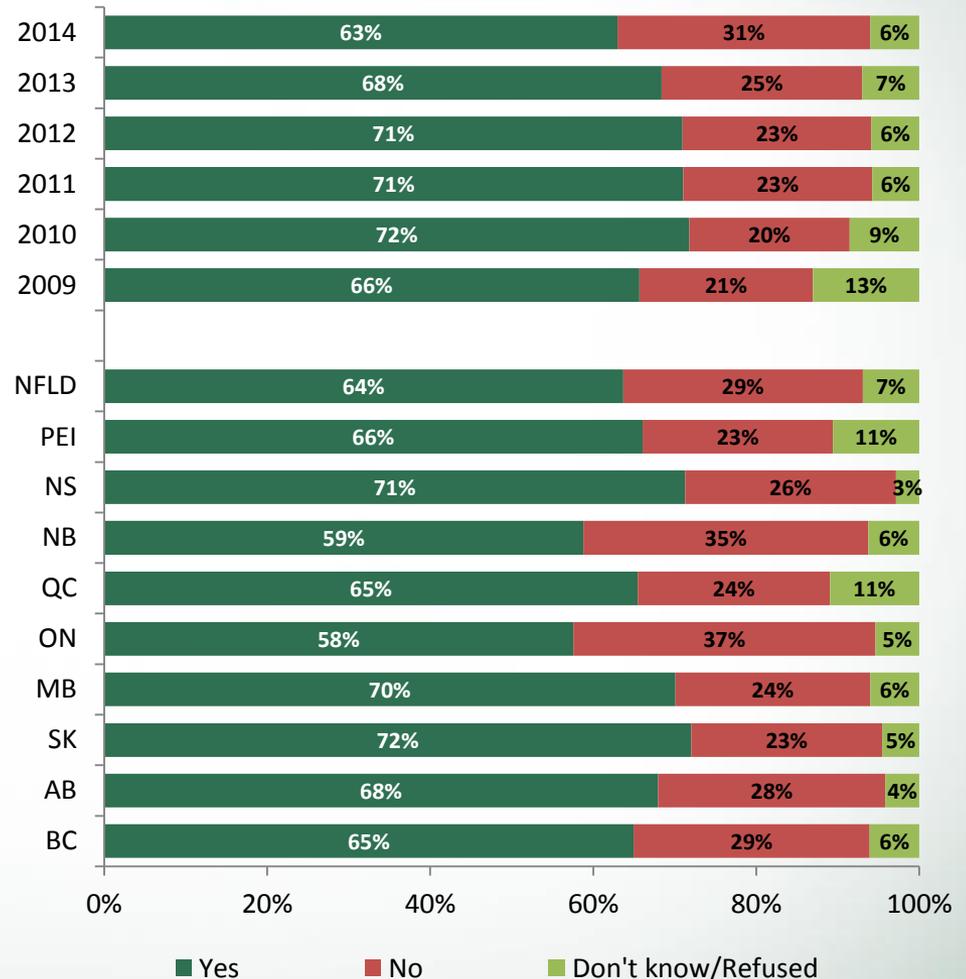


Potential for Cell Phone Recycling

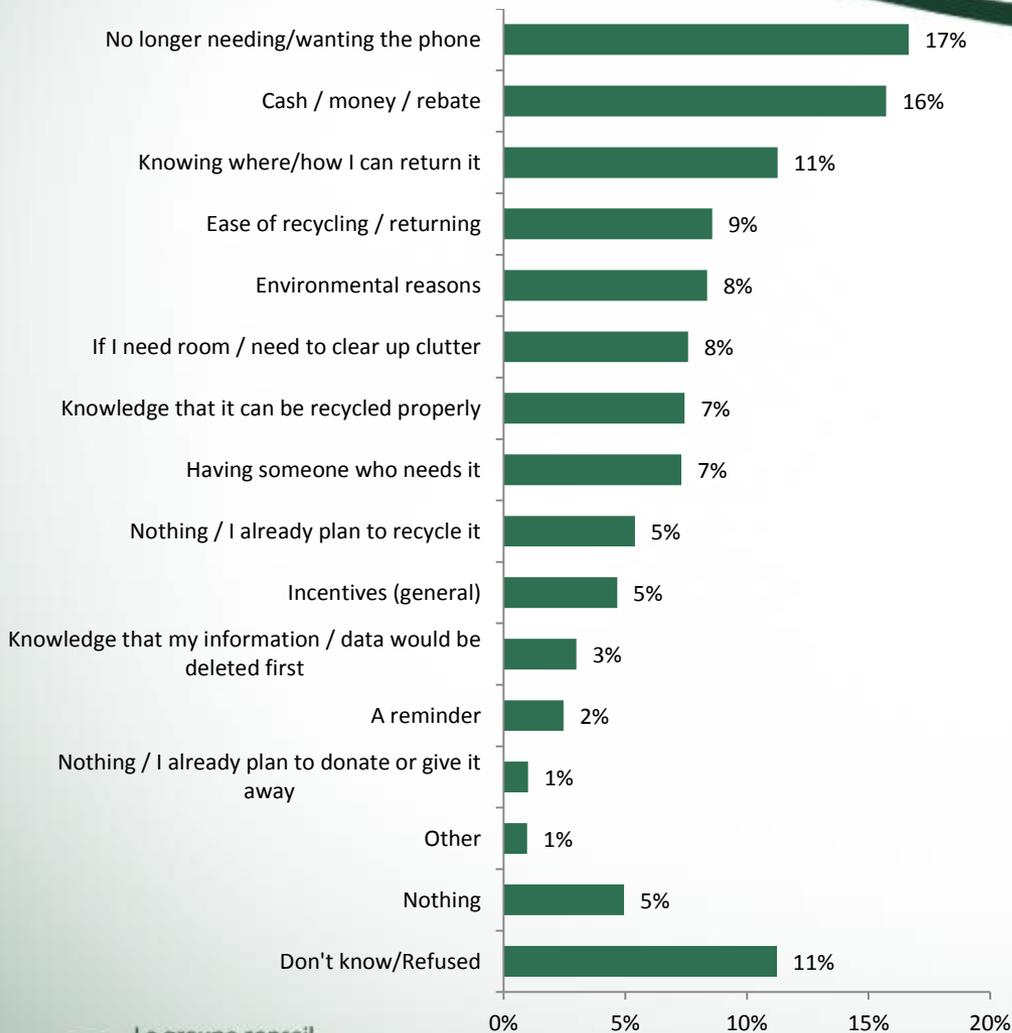
Likelihood of Recycling in the Future

– by province

- Over three in five (63%) Canadians currently storing an old cell phone say they would be willing to recycle or return it.
- The appeal of recycling seems to be fading over time as noted by the increased proportion of those not interested in recycling – it has grown from 20% in 2010 to 31% in the most recent round of research.
- Interest in recycling their stored phones is highest among respondents in Saskatchewan, Nova Scotia and Manitoba, while resistance seems a little higher in New Brunswick and Ontario.
- Previously owned Smartphones might be behind the increasing lack of interest in recycling overall. Respondents still believe in a second life to these devices. Respondents who previously owned a Smartphone are more likely to say they will *not* recycle their phone in the future, compared to those whose previous phone was a regular feature phone (36% vs. 27%).



Encouraging Cell Phone Recycling



- Cell phone owners with a previous cell phone in storage would consider recycling especially...
 - ...if they did not need or want the phone anymore (17%);
 - ...if they had more information on how they can return their phone (11%);
 - ...if the process were easy (9%);
 - ...for environmental reasons (8%); or,
 - ...if they need room or to clear up clutter (8%).

- Another 16% 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 5% referred to incentives in general. These results are consistent with previous surveys.

Encouraging Cell Phone Recycling

- by year

- As mentioned earlier in this report, cell phones are more and more likely to be seeing “second” lives with their owners, either as a back-up device or for other purposes such as listening to music, playing games, etc. As such, it is not surprising to see that a growing proportion of respondents are indicating they will recycle the device when they no longer need it.

Top-6 Mentions	Year					
	2014	2013	2012	2011	2010	2009
No longer needing/wanting the phone	<u>17%</u>	<u>12%</u>	<u>9%</u>	<u>9%</u>	-	5%
Cash / money / rebate	<u>16%</u>	<u>15%</u>	14%	13%	11%	10%
Knowing where/how I can return it	11%	<u>18%</u>	14%	18%	<u>20%</u>	14%
Ease of recycling / returning	<u>9%</u>	<u>9%</u>	<u>8%</u>	<u>11%</u>	5%	<u>12%</u>
Environmental reasons	8%	9%	11%	8%	<u>12%</u>	<u>13%</u>
If I need room / need to clear up clutter	<u>8%</u>	<u>7%</u>	<u>4%</u>	<u>5%</u>	2%	3%

Note: Significantly different numbers are underlined

Encouraging Cell Phone Recycling

– by demographics

Quebec, Ontario and Alberta residents are the most likely to say they would recycle their phones if they no longer needed it. Quebecers are the least likely to feel motivated to recycle their phones with a monetary incentive. More information would be appreciated by those in Newfoundland, Nova Scotia and New Brunswick. Similarly, those in Newfoundland, Ontario, Manitoba, Saskatchewan and Alberta would be encouraged to recycle their phone with an easy process to in place. Environmental reasons are a driver particularly for Quebec residents, while Nova Scotia residents are more likely to recycle their phone if they needed to clear up clutter compared to other regions.

What would encourage you to recycle or return it?	Total	Region		Age			Gender	
		Urban	Rural	18-34	35-54	55+	M	F
No longer needing/wanting the phone	17%	17%	15%	16%	16%	18%	17%	17%
Cash / money / rebate	16%	16%	13%	18%	<u>18%</u>	11%	17%	15%
Knowing where/how I can return it	11%	11%	14%	10%	10%	13%	10%	13%
Ease of recycling / returning	9%	8%	9%	10%	10%	5%	9%	9%
Environmental reasons	8%	9%	7%	6%	8%	12%	9%	8%
If I need room / need to clear up clutter	8%	8%	6%	8%	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
No longer needing/wanting the phone	17%	11%	13%	9%	10%	<u>18%</u>	<u>19%</u>	9%	14%	<u>17%</u>	15%
Cash / money / rebate	16%	<u>14%</u>	<u>15%</u>	<u>18%</u>	<u>20%</u>	5%	<u>19%</u>	<u>19%</u>	<u>17%</u>	<u>16%</u>	<u>19%</u>
Knowing where/how I can return it	11%	<u>16%</u>	13%	<u>15%</u>	<u>24%</u>	7%	12%	12%	13%	<u>15%</u>	10%
Ease of recycling / returning	9%	<u>11%</u>	7%	3%	5%	5%	<u>10%</u>	<u>10%</u>	<u>10%</u>	<u>12%</u>	9%
Environmental reasons	8%	3%	2%	6%	<u>9%</u>	<u>21%</u>	5%	<u>7%</u>	2%	4%	6%
If I need room / need to clear up clutter	8%	4%	9%	<u>12%</u>	7%	6%	9%	7%	9%	4%	8%

Note: Significantly different numbers are underlined

Encouraging Cell Phone Recycling

- by likelihood of recycling it in the future

- Nearly one fifth (19%) of those already inclined to recycle their phone would take action if they felt they really do not need the phone anymore. Other clear motivators are knowing where to recycle it (14%), being provided an easy recycling process (11%), if they needed room or to clear up clutter (11%), or simply for environmental reasons (10%).
- Those who did not anticipate recycling their phone in the future or who are undecided in whether or not to recycle their phone, are more likely to say a monetary incentive or rebate would encourage them to recycle their old phone (26%, and 28% respectively). Fully 13% 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 (2014)		
		Would Recycle	Would not Recycle	Undecided
No longer needing/wanting the phone	17%	<u>19%</u>	13%	6%
Cash / money / rebate	16%	9%	<u>26%</u>	<u>28%</u>
Knowing where/how I can return it	11%	<u>14%</u>	5%	9%
Ease of recycling / returning	9%	<u>11%</u>	6%	1%
Environmental reasons	8%	<u>10%</u>	4%	9%
If I need room / need to clear up clutter	8%	<u>11%</u>	2%	1%
Nothing	5%	1%	<u>13%</u>	6%

Note: Significantly different numbers are underlined

Encouraging Cell Phone Recycling

- by type of previous cell phone

- Those who previously owned a Smartphone would be most compelled to recycle if they either no longer needed the phone (20%) or if there were some sort of incentive (19%).
- Compared to those who previously owned a Smartphone, those who previously owned a regular feature phone are more likely to recycle it if they knew where or how they can return it (14% vs. 8%).

What would encourage you to recycle or return it?	Total	Type of previous cell phone	
		Smartphone	Regular Cell Phone
No longer needing/wanting the phone	17%	20%	14%
Cash / money / rebate	16%	19%	13%
Knowing where/how I can return it	11%	8%	<u>14%</u>
Ease of recycling / returning	9%	7%	9%
Environmental reasons	8%	6%	10%
If I need room / need to clear up clutter	8%	9%	7%

Note: Significantly different numbers are underlined