

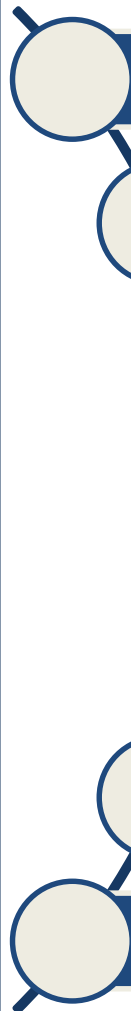
Understanding Cell Phone Recycling Behaviours

CWTA Recycling Summary 2017

submitted by Nanos to the Canadian Wireless Telecommunications Association, March 2018
(Submission 2017-1097)



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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' support and awareness of cell phone recycling programs in general, and of the Recycle My Cell program in particular;
- evaluate Canadians' likelihood of using a cell phone recycling program in the future; and,
- understand what would motivate Canadians to recycle their used cell phones.

The study is of Canadian cell phone owners excluding new phone owners with no previous cell phone to store or dispose of. The results of this report are a part of a tracking study by the CWTA.

Summary

Cell phone ownership

Most Canadians only have one cell phone they actively use, have owned four phones or more prior to their current one, and used their last phone for up to two years. More than six in ten Canadians currently have a cell phone in storage.

- **A significant majority of Canadians actively use one cell phone** – Nearly nine in ten (89%) Canadians personally have one cell phone that they actively use. Nine per cent of Canadians actively use two cell phones, while one per cent use three cell phones and two per cent use four cell phones or more.
- **Nearly half of Canadians have owned four phones or more prior to their current one** – Consistent with 2016, 46 per cent of Canadians have personally owned four cell phones or more prior to their actual phone (46% in 2016; 43% in 2015). Two in five have respectively owned two (19%) or three (18%) phones prior to their current one, while 16 per cent have owned one.
- **Canadians used their previous cell phone for about three years** – On average, Canadians used their previous cell phone for 36.8 months before they acquired their current one. Similarly to 2016, older Canadians tend to hold on to their cell phones longer than younger Canadians (41.4 months compared to 30.7).
- **Over six in ten Canadians have a cell phone in their possession that they are not using** – Sixty-two per cent of Canadians say they have cell phones in their possession that they are not using and are being stored, compared to 37 per cent who say they don't. This is consistent with the 2016 wave which received the same percentages. Canadians report storing an average of 2.4 phones.

Support for recycling

Support for cell phone recycling programs remains very high among Canadians. Awareness is high among Canadians that cell phones can be recycled and that carriers offer upgrades, while awareness is slightly lower that cell phones received through upgrade programs are recycled and reused. A majority of Canadians would consider recycling their cell phone if they knew where and how to do it, mentioning that cash/money/a rebate or it being easy to recycle would encourage them to recycle the most.

- **A majority of Canadians are aware that cell phones can be recycled** – Eighty-two per cent of Canadians are aware cell phones can be recycled, compared to 16 per cent who are unaware of this. Two per cent are unsure.
- **Over three in four Canadians are aware that most cell phone carriers allow to upgrade cell phones** – Seventy-six per cent of Canadians are aware that most cell phone carriers have trade-in or programs that allow them to upgrade their cell phones (80% in 2016), while 21 per cent are unaware of this.

- **Seven in ten Canadians aware of trade-ins or upgrade programs are aware that cell phones received through those programs are either recycled or reused** – Seventy-one per cent of Canadians who are aware of trade-in and upgrade programs through cell phone carriers are aware that cell phones received through trade-in and upgrade programs are recycled or reused (consistent with 2016), compared to 24 per cent who are unaware of this.
- **Over eight in ten Canadians would consider recycling their cell phones if they knew where to recycle them** – Asked whether they would consider or would not consider recycling their cell phones if they knew where to recycle them, 84 per cent of Canadians say they would consider doing this, while 12 per cent would not consider recycling their cell phone(s), and five per cent are unsure.
- **A majority of Canadians would consider recycling their cell phones for the environment** – The most mentioned reason for why they would or would not consider recycling their cell phones was for the environment/I recycle everything/waste to throw away/right thing to do (56%), followed by no use for it/better than having it laying around (12%).
- **More than two in ten Canadians say cash, money or a rebate would encourage them to recycle their phone** – Asked what would encourage them to recycle their cell phone, just over two in ten Canadians say cash/money/rebate (23%), consistent with 2016 (21%). Other top mentions included ease of recycling/returning (15%), knowing where/how I can return it (nine per cent), and no encouragement needed/I already do (nine per cent).
- **A large majority of Canadians support or somewhat support cell phone recycling programs** – Support for cell phone recycling remains very high with more than nine in ten Canadians saying they support (87%) or somewhat support (nine per cent) programs that encourage the recycling of old, unused or unwanted cell phones. This is consistent with the 2016 and 2015 waves of research.
- **Paper/newspaper and plastic/plastic bottles are the two top mentions when Canadians think of recycling** – Over half of Canadians say paper/newspaper (27%) or plastic/plastic bottles (26%) come to mind when they think about recycling, consistent with 2016.

Cell phone disposal

Storing away an old phone was the most popular method of cell phone disposal for Canadians. Older Canadians are more likely to recycle their old phone, while younger Canadians are more likely to give away or sell their last phone.

- **Two in five Canadians stored their previous phone away after receiving their current phone** – Asked what they did with their previous old phone after receiving their current one, 43 per cent of Canadians say they stored it away, while 16 per cent gave it away. Twelve per cent recycled their old phone, while 11 per cent returned or traded it in to their cell phone carrier. This is consistent with the 2016 and 2015 waves.

- **Young Canadians are less likely than other age groups to recycle their old phone** – For the most part, no significant differences were noted with regards to cell phone storage and disposal among respondents from different provinces and demographic categories. Similarly to 2015 and 2016, young Canadians aged 18 to 34 are less likely to recycle their previous cell phone compared to Canadians 35 to 54 or 55 plus (eight per cent for 18-34, compared to 14% for 35 to 54, and 12% for 55 plus).

Cell phone storage

Canadians who stored their previous phone reported having stored their phone for a year or less, most often say they stored their phone because they did not know what else to do with it or they are keeping it as a backup.

- **Two in five Canadians have been storing their old cell phone for a year or less** – Forty per cent of Canadians who stored their last phone have been storing their previous cell phone for 1-12 months, while 29 per cent have been storing it for 13-24 months, 21 per cent have been storing it for more than 36 months, and 10 per cent have been storing it for 25-36 months. This is consistent with the 2016 and 2015 waves.
- **Two in ten Canadians have kept their previous phone because they do not know what else to do with it** – Two in ten Canadians who stored their previous phone, did so because they don't know what else to do with it (20%) or as a backup/extra (18%). Thirteen per cent kept their old phone for the phone numbers/information on it, while 10 per cent kept it for a future need.

Cell phone recycling

Canadians who recycled their previous phone most often report taking it to a depot for special or hazardous waste, or programs through a retail store or cellular provider, with the majority reporting they were satisfied with their recycling experience.

- **The most common approaches to recycle old phones are through a special/hazardous waste depot and cell phone recycling programs with a cellular service provider or a retail store** – Asked how they recycled their old phone, 35 per cent of Canadians report taking it to a depot for special/hazardous waste, 27 per cent recycled it through a cell phone recycling program with a cellular service provider, while 17 per cent recycled it through a cell phone recycling program through a retail store. Ten per cent recycled their old phone with the Recycle My Cell Program (up from eight per cent in 2016).
- **Majority of Canadians who recycled their phone were satisfied with their cell recycling experience** – Close to nine in ten Canadians who recycled their old cell phone were satisfied with their cell recycling experience, giving it at least a 5 on a 7-point scale (48% gave it 7 out of 7; 27% gave it 6 out of 7; and 13% gave it a 5). Twelve per cent of Canadians gave it a score of 1-4 out of 7, an increase from six per cent in 2016 and 2015. The mean score was 6.0 out of 7.

Next steps to recycling

Four in ten Canadians would turn to Google or the Internet for information if they were to consider recycling their old cell phone, followed by their cellular service provider. That being said, overall awareness of recycling programs for unused cell phones is at just over one in three at the time of the survey, with the highest unprompted awareness for programs with cell phone companies, recycling depots, and retail stores. Canadians who reported throwing away their phone are the least likely to be aware of recycling programs for cell phones, while those who recycled their previous phone or donated it to charity are the most likely to be aware of them.

- **Four in ten Canadians would look for information on Google if they were considering recycling their old cell phone** – Asked where they would look for information if they were to consider recycling their old phone, 40 per cent of Canadians would turn to Google and 28 per cent through their cellular service provider.
- **Over one in three Canadians are aware of cell phone recycling program** – Similarly to the 2015 and 2016 waves, 36 per cent of Canadians are aware of recycling programs for old or unused cell phones (37% in 2016, 36% in 2015), while 59 per cent are unaware. Five per cent are unsure.
- **Canadians are most aware of recycling programs through cell phone companies, recycling depots, and retail stores** – Asked what cell phone recycling programs they are aware of, 25 per cent of Canadians aware of such programs mentioned cell phone company recycling programs (e.g. Bell, TELUS, Rogers, etc.), followed by recycling depot (23%), and retail stores recycling programs (e.g. Staples, Best Buy, etc.)(19%). Unaided awareness of Recycle My Cell remains in the same range as 2016, with three per cent mentioning the program compared to five per cent in 2016.
- **More than one in ten Canadians aware of recycling programs have heard of the Recycle My Cell program** – Of those who are aware of any cell phone recycling programs, 15 per cent say they have heard of the Recycle My Cell programs (16% in 2016), while 80 per cent say they have not. Quebecers and Manitobans are particularly more aware of the Recycle My Cell program than other provinces (21% each), while awareness is lowest in Alberta (seven per cent) and New Brunswick (nine per cent).

Nanos administered a dual mode survey (telephone and online) with one half of the sample conducted by telephone (RDD dual frame land- and cell-line sample) using live agents and one half of the survey conducted with an online probability sample, where individuals were recruited by land- and cell-line sample but administered surveys online, 3000 Canadians (300 in each province), 18 years of age or older, between December 4th and 18th, 2017. The margin of error for a random survey of 3,000 Canadians is ± 1.8 percentage points, 19 times out of 20, while the margin of error for a random survey 300 residents of a Canadian province is ± 5.7 percentage points, 19 times out of 20.

This study was commissioned by the Canadian Wireless Telecommunications Association (CWTA) and conducted by Nanos Research.

Please see the following report for detailed findings.

Detailed findings



Products, materials and items associated with recycling

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=7313 (respondents who currently own a cell phone), accurate 1.1 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=3003 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Responses	Frequency	
	2017 (n=7313)*	2016 (n=3003)*
Paper/Newspapers	26.5%	38.3%
Plastic/Plastic bottles	25.6%	25.8%
Glass	13.4%	9.6%
Tin cans/Aluminum cans/Pop cans	8.6%	7.8%
Cardboard	9.9%	6.1%
Everything used at home/Everything that can be recycled	1.1%	4.2%
Compost/Food waste/Trash	2.4%	2.0%
Electronics/Batteries	1.9%	1.4%
Metal	6.8%	1.2%
Blue bins/Green bins	0.8%	1.0%
Tires/rubber	0.2%	-
Wood	0.4%	-
Clothing	0.4%	-
Other	1.3%	1.6%
Unsure	0.7%	0.9%

*Based on multiple mentions

QUESTION – When you think about recycling, what products, materials, or items come to mind?
[Open-ended]

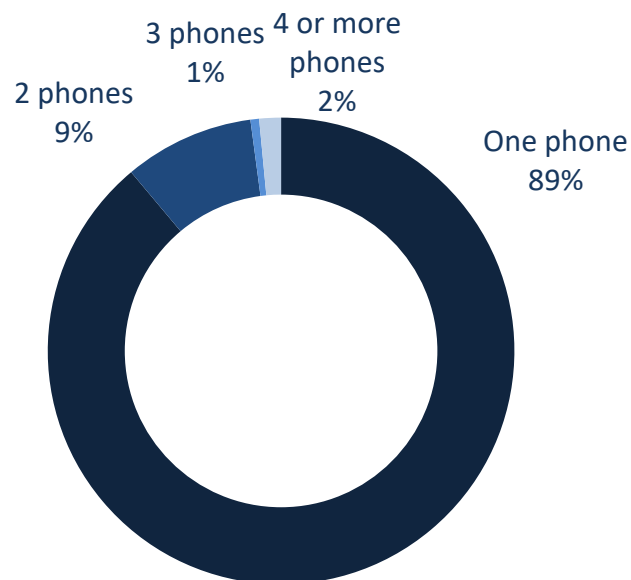
1.0 Cell phone ownership



Cell phones actively used

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Mean # of phones
1.3 phones



- Nearly nine in ten respondents (89%) actively use one cell phone, and the reported mean number of active phones was 1.3. However, nine per cent indicated they actively use two phones, while one per cent actively use three phones and two per cent use four or more phones.

***Note:** Charts may not add up to 100 due to rounding

Subgroups	One phone
Newfoundland and Labrador (n=300)	86.8%
New Brunswick (n=300)	90.1%
Nova Scotia (n=300)	87.2%
Prince Edward Island (n=300)	91.3%
Quebec (n=300)	88.0%
Ontario (n=300)	89.3%
Manitoba (n=300)	90.6%
Saskatchewan (n=300)	92.8%
Alberta (n=300)	85.3%
British Columbia (n=300)	90.8%
18 to 34 (n=644)	85.3%
35 to 54 (n=1017)	86.0%
55 plus (n=1339)	93.8%
Male (n=1577)	85.9%
Female (n=1423)	91.6%
Urban (n=2249)	88.9%
Rural (n=751)	88.7%

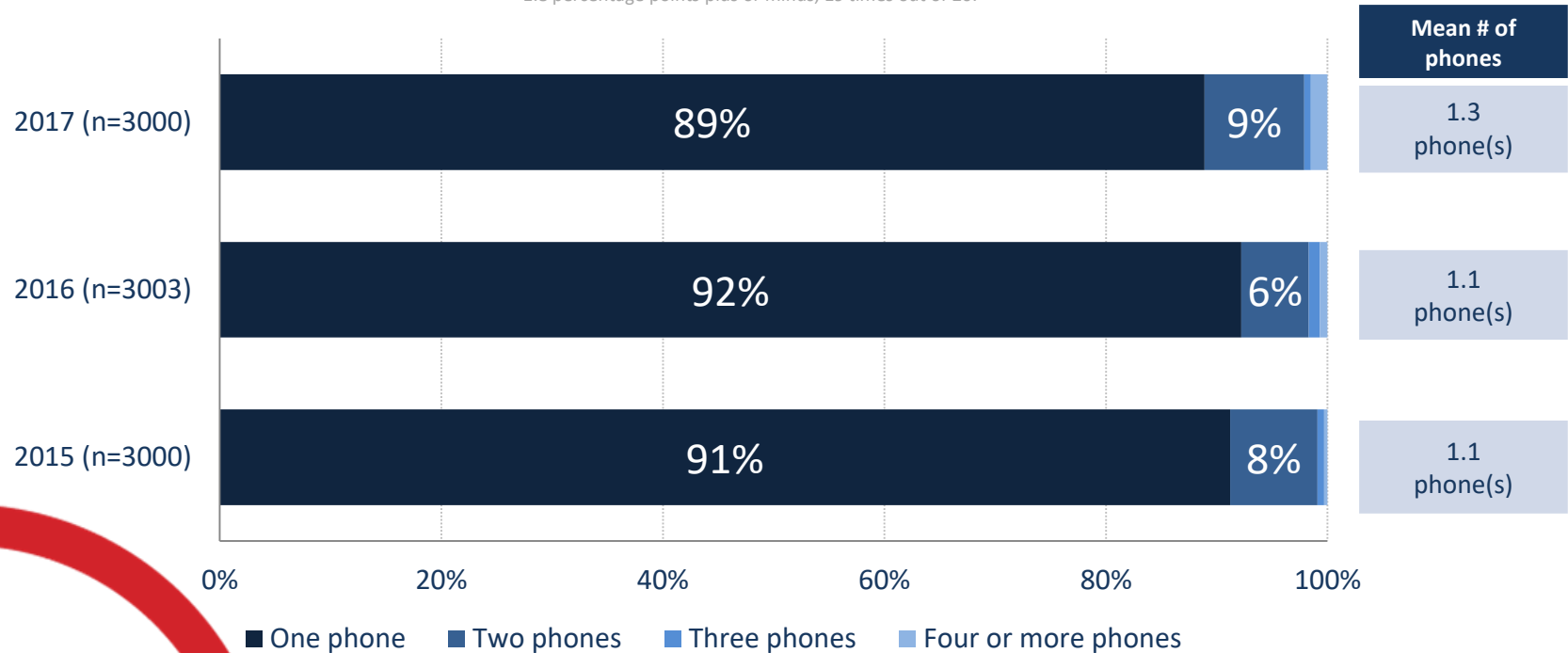
QUESTION – How many cell phones do you personally have that you actively use?
[Open-ended]

Cell phones actively used – by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=3003 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Sources: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.



***Note:** Charts may not add up to 100 due to rounding

QUESTION – How many cell phones do you personally have that you actively use? [Open-ended]

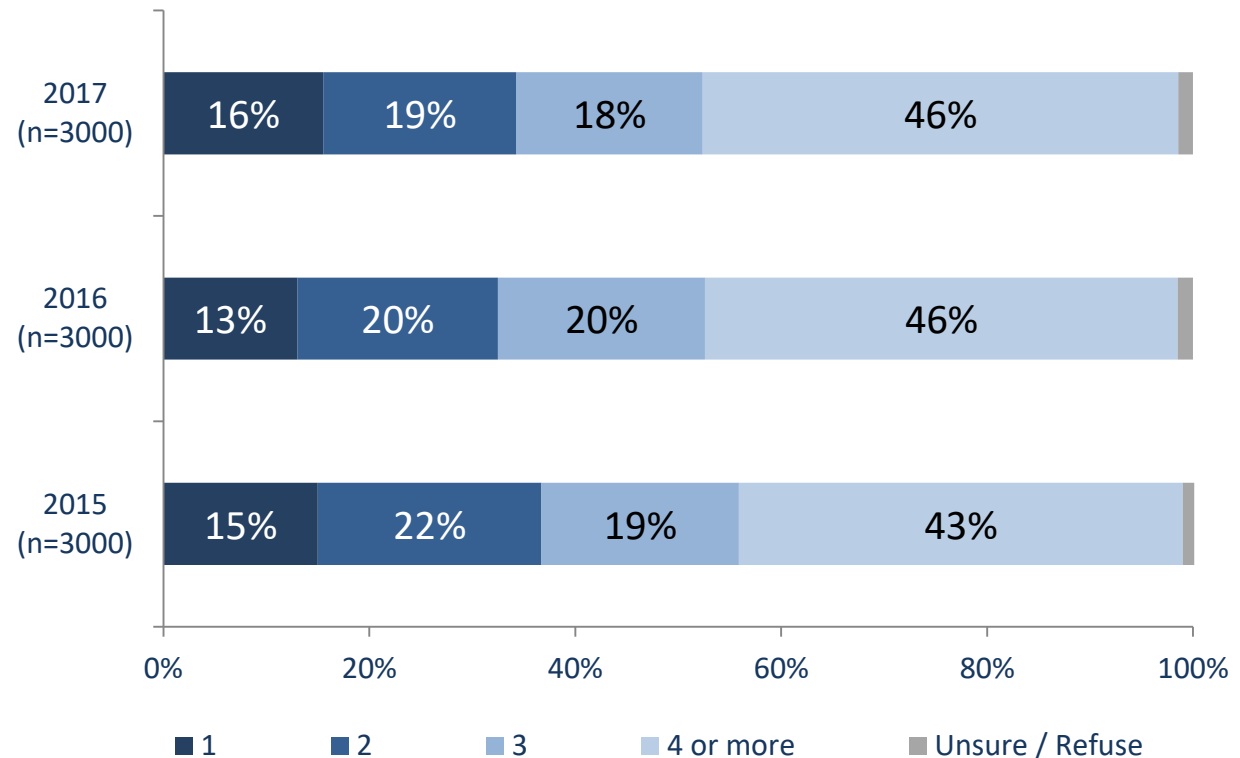
Prior cell phone ownership – by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- Canadians have owned about four cell phones on average prior to their current one.
- These results are similar to those reported last year. Sixteen per cent are first-time owners, and nearly half of Canadians have owned at least four cell phones or more prior to their current one.

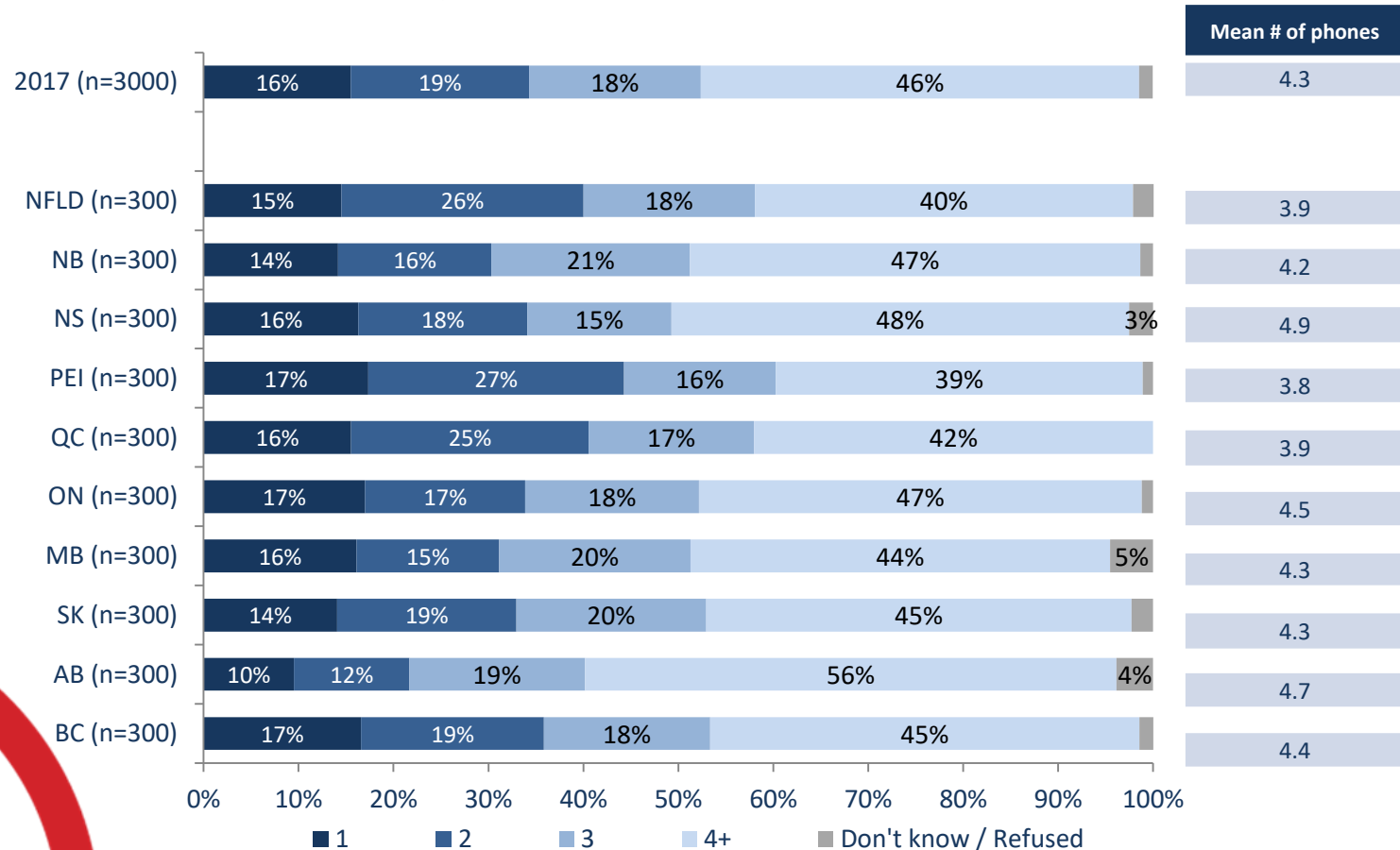


*Note: Charts may not add up to 100 due to rounding

QUESTION – Approximately how many cell phones have you personally owned prior to your current phone? [Open-ended]

Prior cell phone ownership - by province

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.



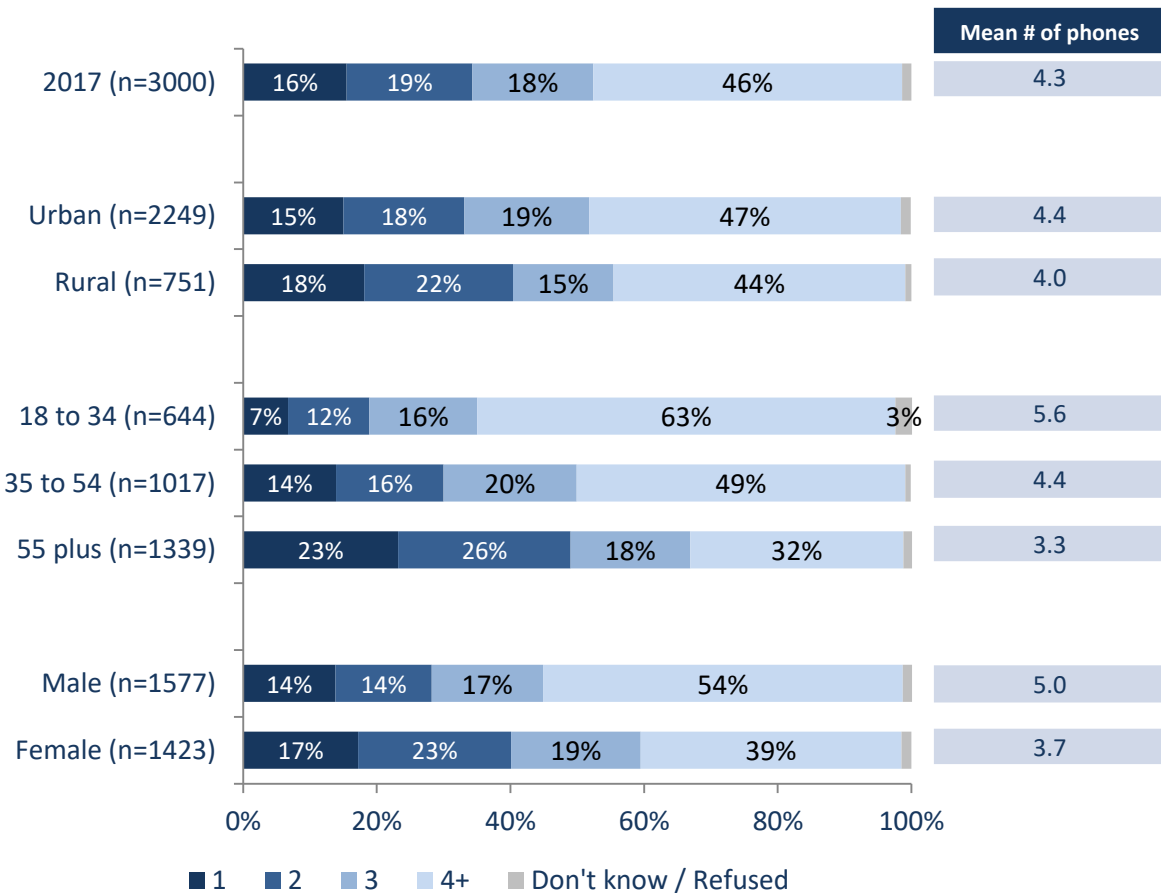
*Note: Charts may not add up to 100 due to rounding

QUESTION – Approximately how many cell phones have you personally owned prior to your current phone? [Open-ended]

Prior cell phone ownership - by demographic

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- Older Canadians are more likely to say they only had one cell phone prior to their current one (23%), compared to younger respondents (7%). Additionally, more than half of those under 35 (63%) and half of those 35 to 54 (49%) have owned at least 4 phones, while just over one in three (32%) 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 (54% vs. 39%).



*Note: Charts may not add up to 100 due to rounding

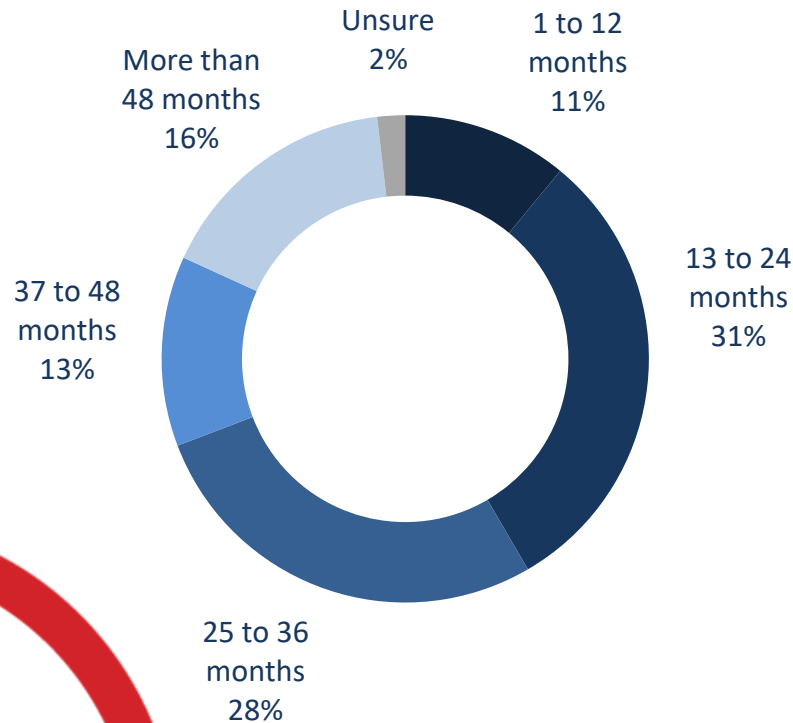
QUESTION – Approximately how many cell phones have you personally owned prior to your current phone? [Open-ended]

Cell phone usage

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Mean # of months

36.8 months



*Note: Charts may not add up to 100 due to rounding

Subgroups	13 to 24 months
Newfoundland and Labrador (n=300)	29.1%
New Brunswick (n=300)	31.6%
Nova Scotia (n=300)	32.6%
Prince Edward Island (n=300)	24.1%
Quebec (n=300)	36.0%
Ontario (n=300)	31.0%
Manitoba (n=300)	30.9%
Saskatchewan (n=300)	31.4%
Alberta (n=300)	23.2%
British Columbia (n=300)	25.1%
18 to 34 (n=644)	37.1%
35 to 54 (n=1017)	31.4%
55 plus (n=1339)	25.4%
Male (n=1577)	31.0%
Female (n=1423)	30.3%
Urban (n=2249)	29.8%
Rural (n=751)	35.1%

QUESTION – For how long did you use your previous phone? (enter # of months)
[Open-ended]

Cell phone usage – by province and demographic

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=2945 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=2919 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=2947 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- The observed average time of ownership for previous phones was 36.8 months.

Ownership: Average in months	Total (n=2945)	Province									
		NFLD (n=45)	NB (n=67)	NS (n=82)	PEI (n=13)*	QC (n=701)	ON (n=1142)	MB (n=108)	SK (n=92)	AB (n=324)	BC (n=371)
Prior cell phone use	36.8	38.5	36.3	34.7	38.9	35.6	37.7	33.7	34.6	36.0	38.6

Ownership: Average in months	Total (n=2945)	Region		Age			Gender		Year		
		Urban (n=2480)	Rural (n=465)	18 to 34 (n=812)	35 to 54 (n=1009)	55 plus (n=1124)	Male (n=1445)	Female (n=1501)	2015 (n=2947)	2016 (n=2919)	2017 (n=2945)
Prior cell phone use	36.8	36.7	37.1	30.7	36.5	41.4	34.7	38.8	33.6	34.2	36.8

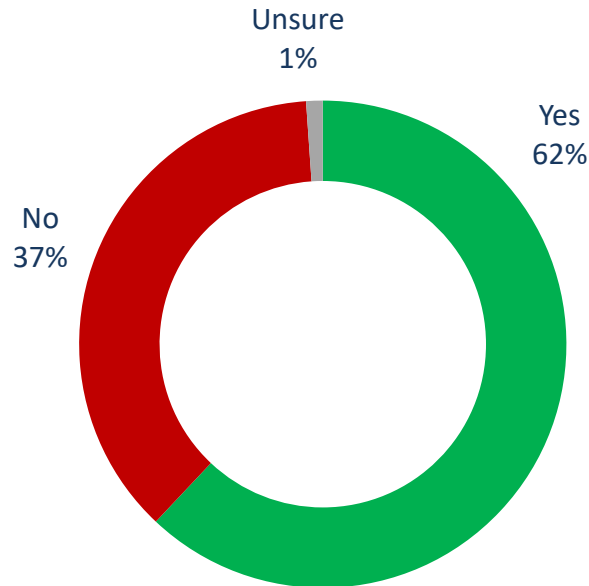
*Shaded due to small sample size

QUESTION – For how long did you use your previous phone? (enter # of months) [Open-ended]

Stored cell phones

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- Just over six in ten respondents (62%) say they have a cell phone in their possession that is currently being stored.



***Note:** Charts may not add up to 100 due to rounding

QUESTION – Do you currently have any cell phones in your possession that you are not using, and are being stored, for example, in a junk drawer?

Subgroups	Yes
Newfoundland and Labrador (n=300)	66.6%
New Brunswick (n=300)	69.8%
Nova Scotia (n=300)	60.1%
Prince Edward Island (n=300)	51.1%
Quebec (n=300)	58.5%
Ontario (n=300)	63.7%
Manitoba (n=300)	65.1%
Saskatchewan (n=300)	66.1%
Alberta (n=300)	68.4%
British Columbia (n=300)	54.6%
18 to 34 (n=644)	69.3%
35 to 54 (n=1017)	65.4%
55 plus (n=1339)	53.9%
Male (n=1577)	64.9%
Female (n=1423)	59.3%
Urban (n=2249)	61.3%
Rural (n=751)	66.0%

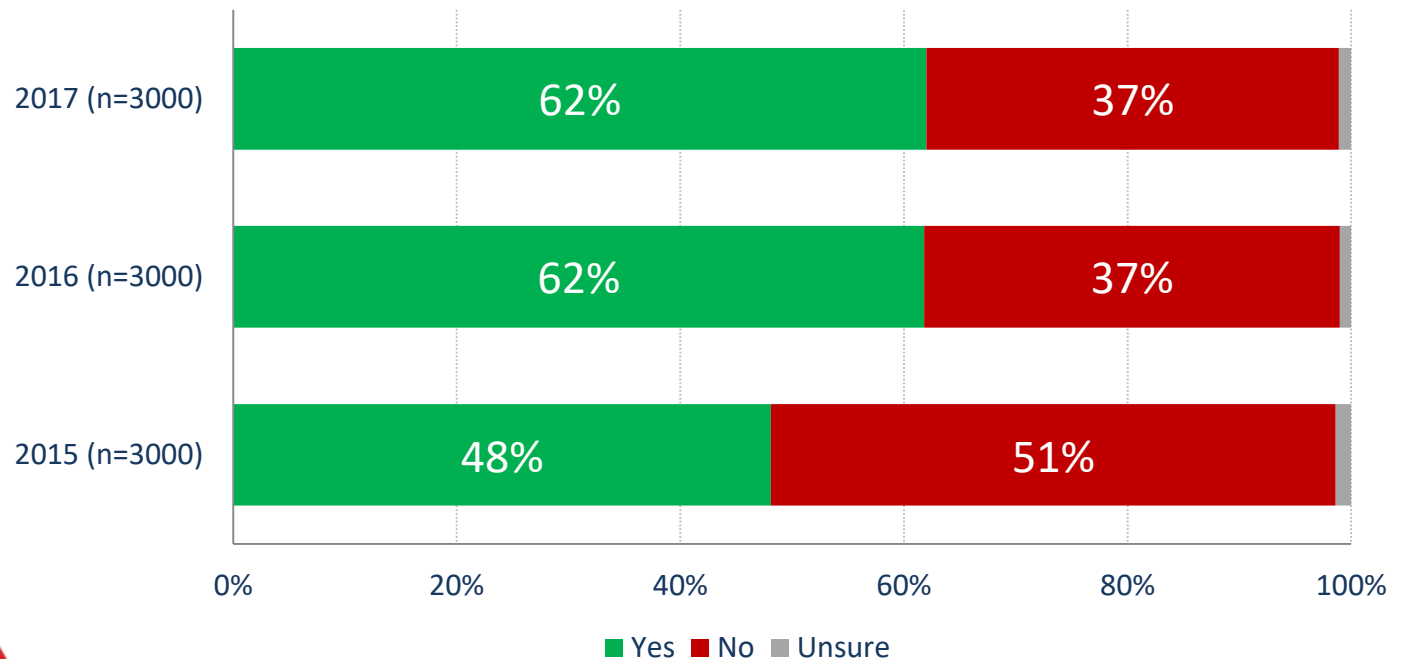
Stored cell phones – by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- 2017 was consistent with 2016 in terms of the number of Canadians who reported having cell phones they are storing (62% in both years).



*Note: Charts may not add up to 100 due to rounding

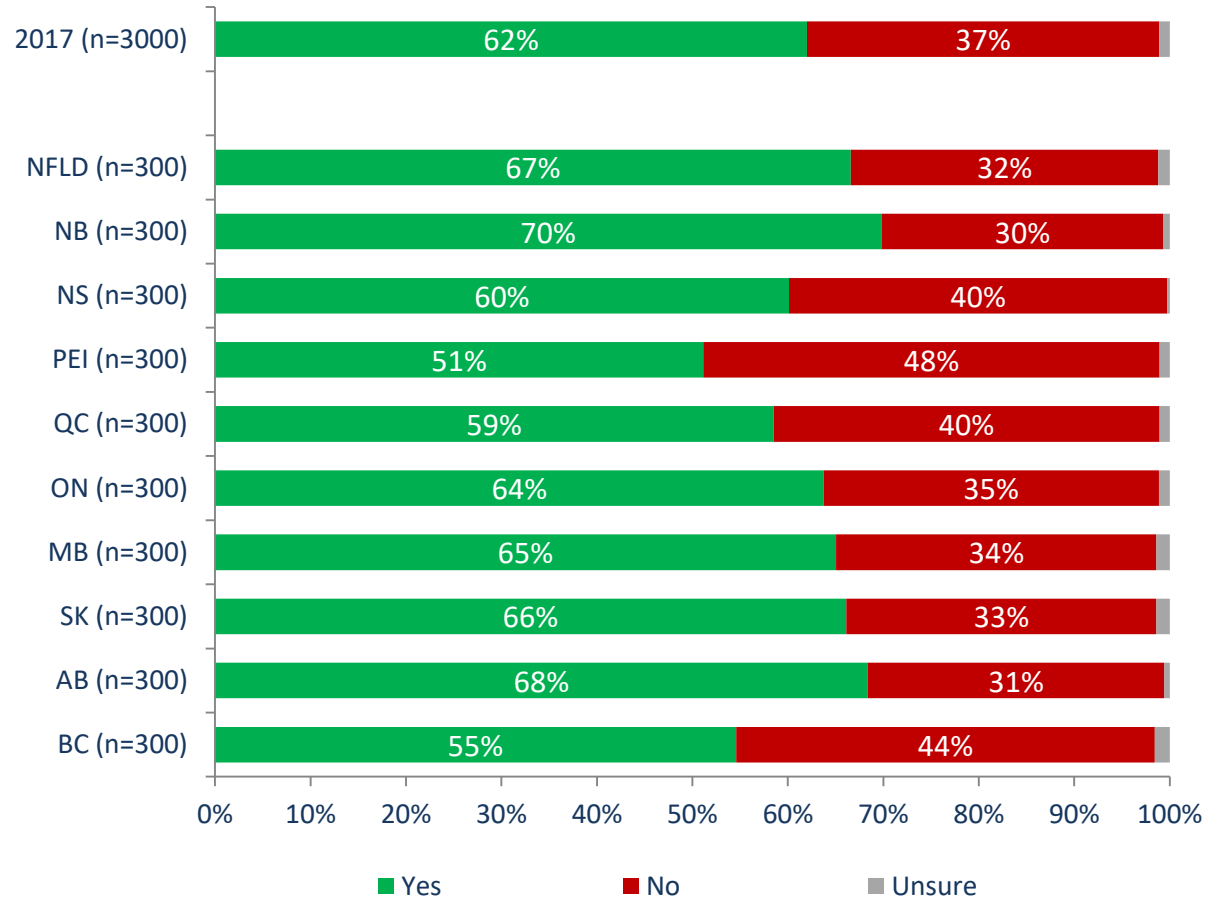
QUESTION – Do you currently have any cell phones in your possession that you are not using, and are being stored, **for example, in a junk drawer?** (2017 and 2016 Waves)

QUESTION - Do you currently have cell phones in your possession that are being stored? (2015 Wave)

Stored cell phones - by province

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- Overall, most provinces followed the national trend with more respondents reporting storing cell phones than not storing them.



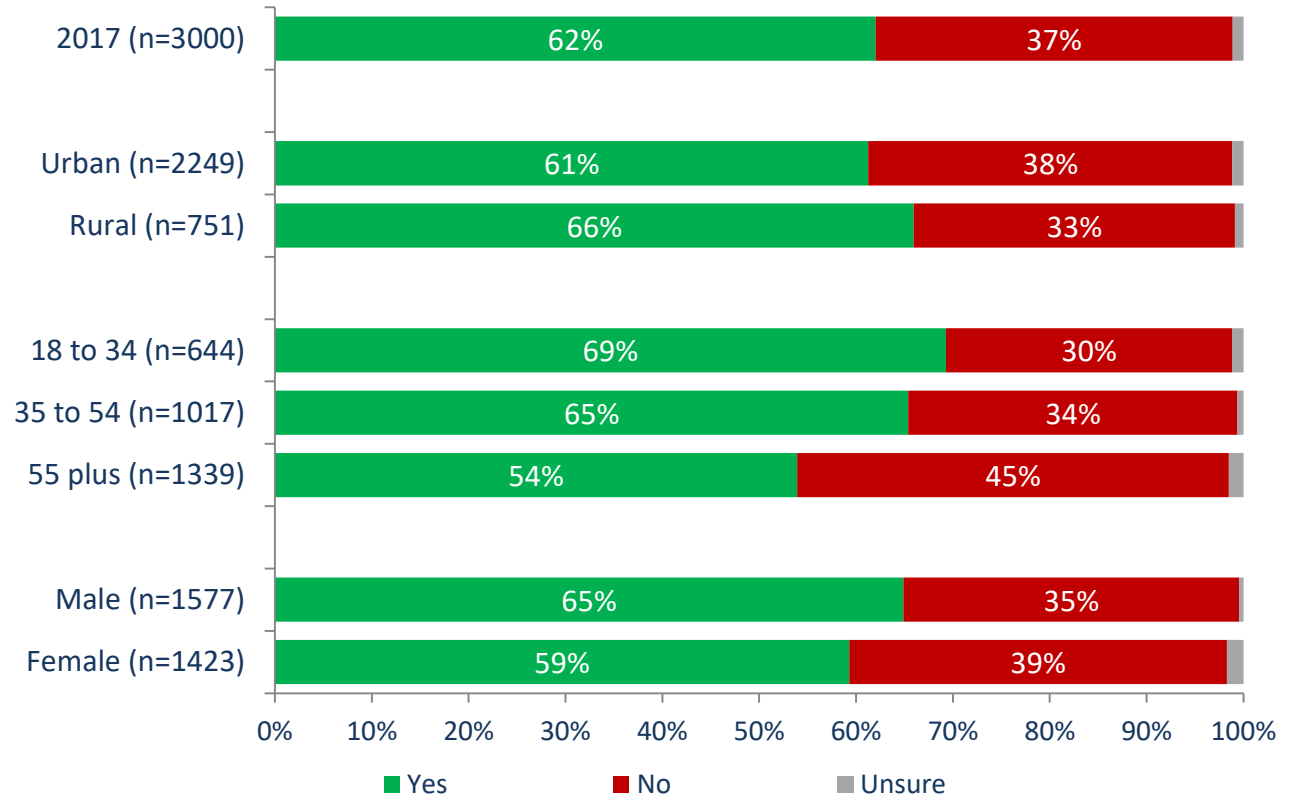
*Note: Charts may not add up to 100 due to rounding

QUESTION – Do you currently have any cell phones in your possession that you are not using, and are being stored, for example, in a junk drawer?

Stored cell phones - by demographic

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- Participants in the 55 plus age bracket were the least likely of any demographic group to have a phone in storage.

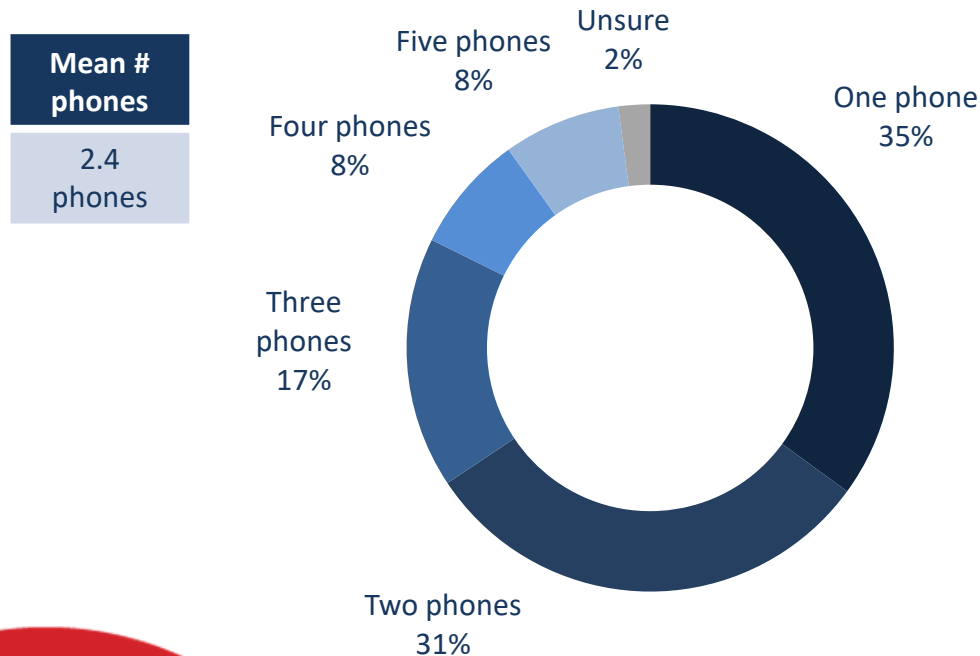


*Note: Charts may not add up to 100 due to rounding

QUESTION – Do you currently have any cell phones in your possession that you are not using, and are being stored, for example, in a junk drawer?

Cell phones being stored

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=1854 (respondents who currently own a cell phone), accurate 2.3 percentage points plus or minus, 19 times out of 20. STORED PHONES ONLY.



- On average, Canadians have 2.4 phones in storage.
- Overall, 35 per cent of respondents had one phone in storage, while about 31 per cent had two in storage. Seventeen per cent have three phones in storage. Eight per cent each have four or five phones in storage.

***Note:** Charts may not add up to 100 due to rounding

Subgroups	One phone
Newfoundland and Labrador (n=198)	39.0%
New Brunswick (n=211)	35.5%
Nova Scotia (n=178)	34.6%
Prince Edward Island (n=153)	36.9%
Quebec (n=170)	38.4%
Ontario (n=189)	33.7%
Manitoba (n=194)	36.8%
Saskatchewan (n=195)	32.7%
Alberta (n=203)	29.6%
British Columbia (n=163)	38.3%
18 to 34 (n=430)	31.8%
35 to 54 (n=687)	29.1%
55 plus (n=737)	44.2%
Male (n=1013)	31.3%
Female (n=841)	38.8%
Urban (n=1386)	34.9%
Rural (n=468)	35.8%

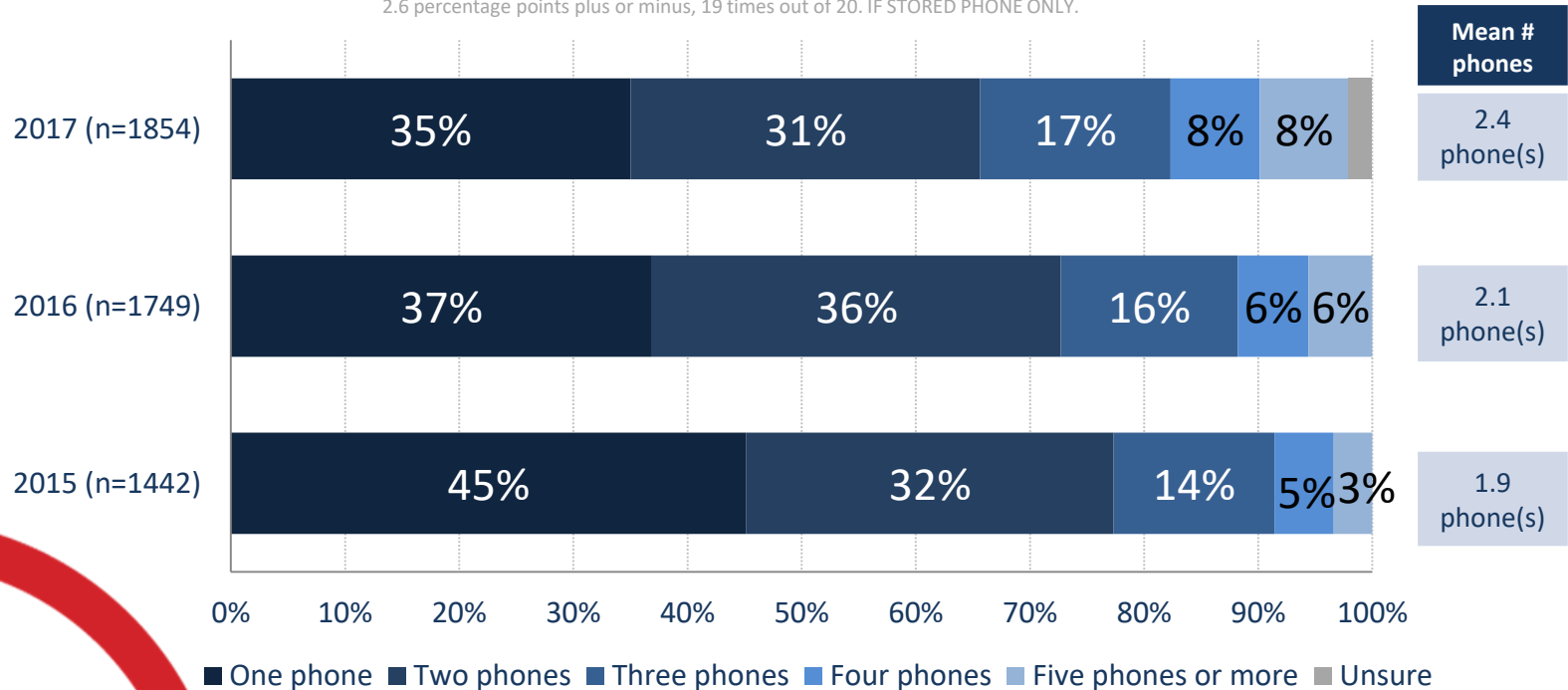
QUESTION – [IF HAS PHONE STORED] Approximately how many cell phones do you have stored? [Open-ended]

Cell phones being stored – by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=1854 (respondents who currently own a cell phone), accurate 2.3 percentage points plus or minus, 19 times out of 20. STORED PHONES ONLY.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=1749 (respondents who currently own a cell phone), accurate 2.3 percentage points plus or minus, 19 times out of 20. IF STORED PHONE ONLY.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=1442 (respondents who currently own a cell phone), accurate 2.6 percentage points plus or minus, 19 times out of 20. IF STORED PHONE ONLY.



***Note:** Charts may not add up to 100 due to rounding

QUESTION – [IF HAS PHONE STORED] Approximately how many cell phones do you have stored? [Open-ended]

Cell phones being stored - by demographic

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=1821 (respondents who currently own a cell phone), accurate 2.3 percentage points plus or minus, 19 times out of 20. STORED PHONES ONLY.

- The tables below show the demographic breakdown of cell phone storage.

Storage: Mean	Total (n=1821)	Province									
		NFLD (n=31)	NB (n=44)	NS (n=50)	PEI (n=6)*	QC (n=414)	ON (n=718)	MB (n=69)	SK (n=61)	AB (n=225)	BC (n=202)
Number of phones in storage	2.4	2.3	2.7	2.9	4.2	2.1	2.5	3.2	2.2	2.6	2.6

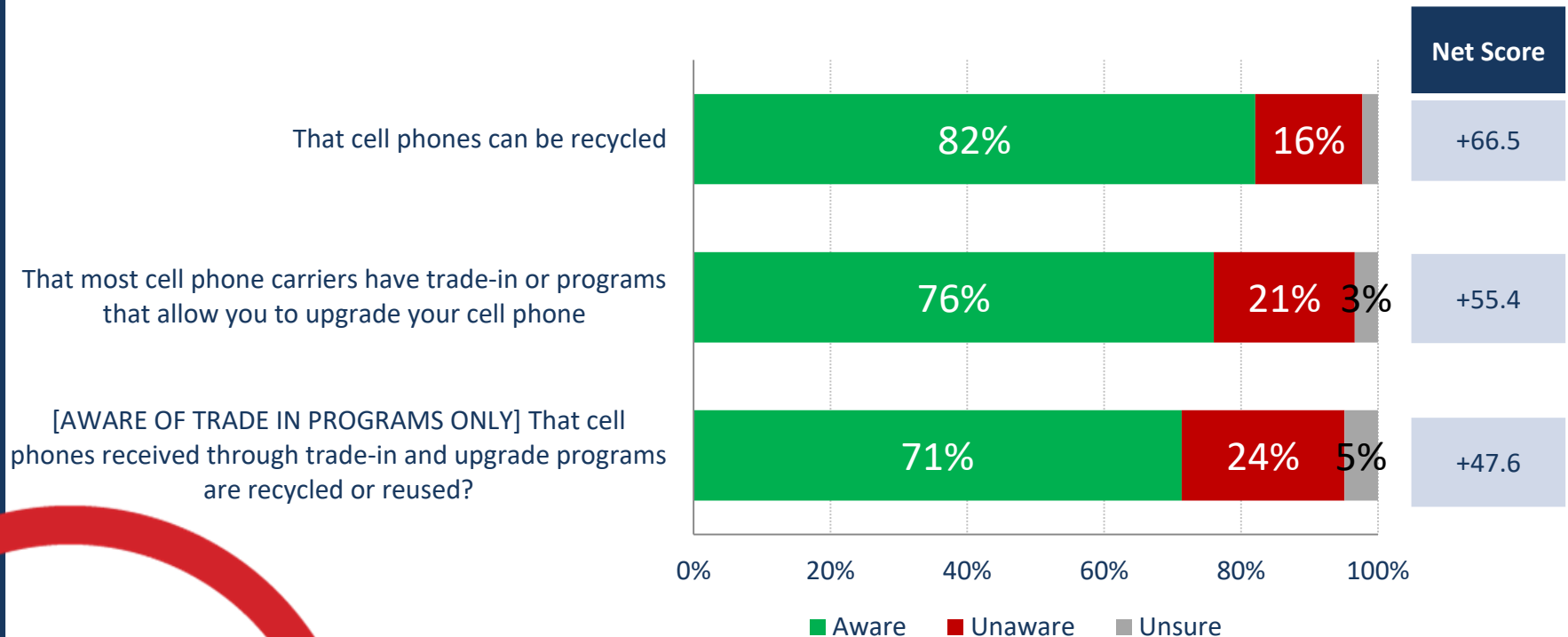
Storage: Mean	Total (n=1821)	Region		Age			Gender	
		Urban (n=1511)	Rural (n=310)	18 to 34 (n=550)	35 to 54 (n=657)	55 plus (n=613)	Male (n=924)	Female (n=897)
Number of phones in storage	2.4	2.4	2.6	2.6	2.7	2.1	2.6	2.3

*Shaded due to small sample size

QUESTION – [IF HAS PHONE STORED] Approximately how many cell phones do you have stored? [Open-ended]

Awareness regarding recycling phones

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.



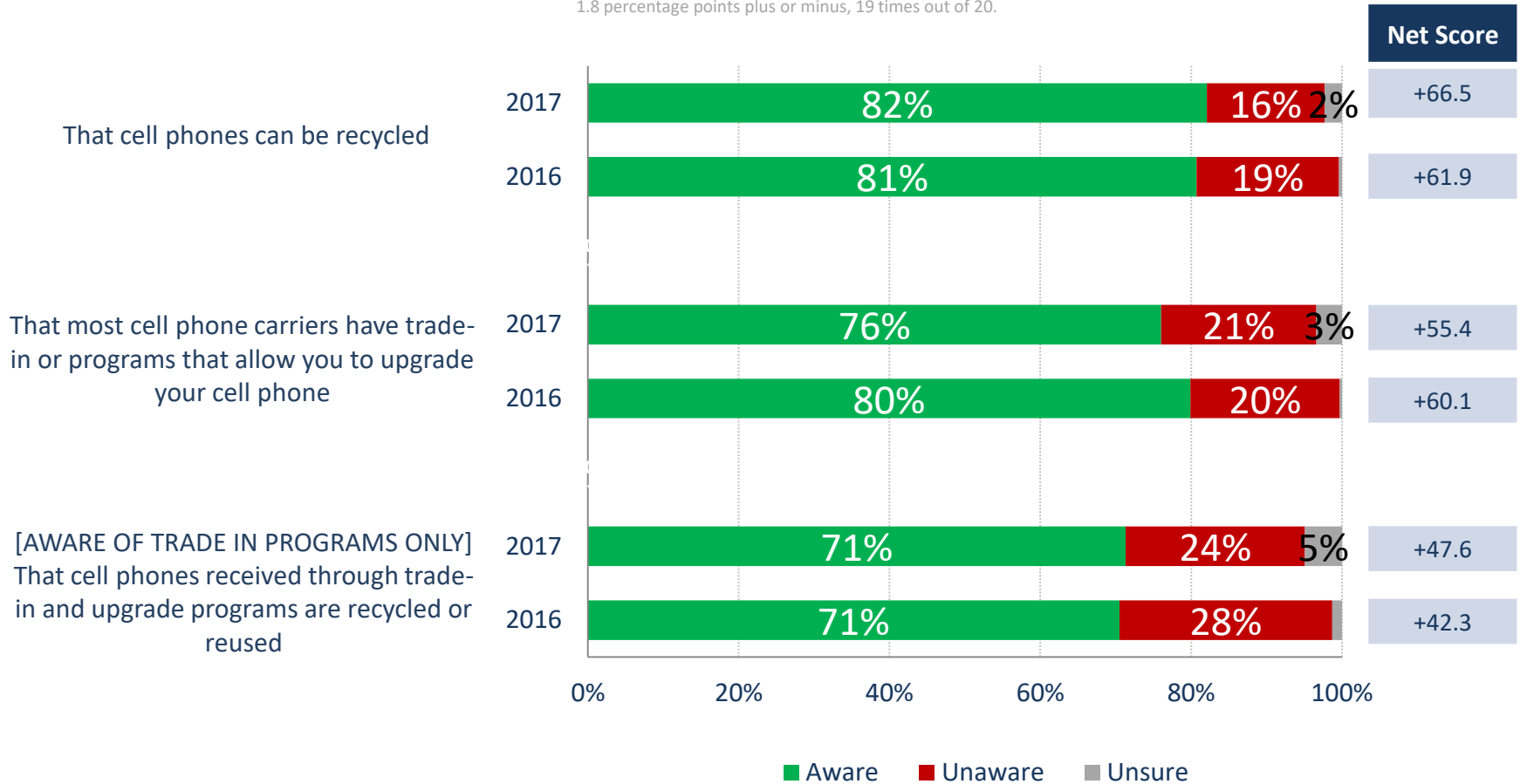
*Note: Charts may not add up to 100 due to rounding

QUESTION – Are you aware or not aware of the following:

Awareness regarding recycling phones – by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.



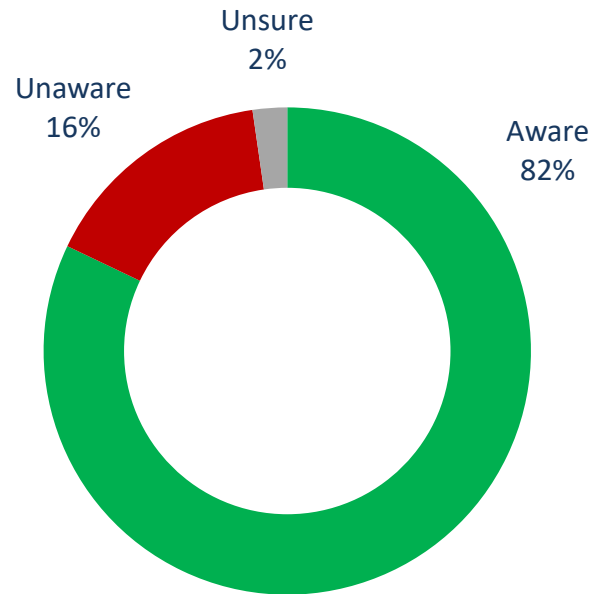
***Note:** Charts may not add up to 100 due to rounding

QUESTION – Are you aware or not aware of the following:

Awareness that cell phones can be recycled

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Net Score
+66.5



*Note: Charts may not add up to 100 due to rounding

QUESTION – Are you aware or not aware of the following:

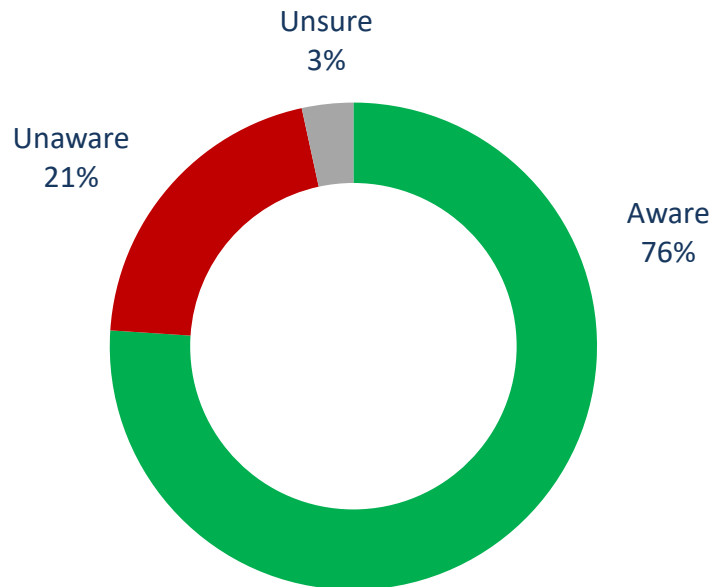
That cell phones can be recycled

Subgroups	Aware
Newfoundland and Labrador (n=300)	81.8%
New Brunswick (n=300)	78.8%
Nova Scotia (n=300)	81.8%
Prince Edward Island (n=300)	83.5%
Quebec (n=300)	82.7%
Ontario (n=300)	80.0%
Manitoba (n=300)	83.6%
Saskatchewan (n=300)	82.3%
Alberta (n=300)	85.2%
British Columbia (n=300)	84.8%
18 to 34 (n=644)	80.9%
35 to 54 (n=1017)	84.8%
55 plus (n=1339)	80.5%
Male (n=1577)	83.9%
Female (n=1423)	80.4%
Urban (n=2249)	81.8%
Rural (n=751)	83.4%

Awareness of phone carrier trade-in programs to upgrade cell phone

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Net Score
+55.4



*Note: Charts may not add up to 100 due to rounding

QUESTION – Are you aware or not aware of the following:

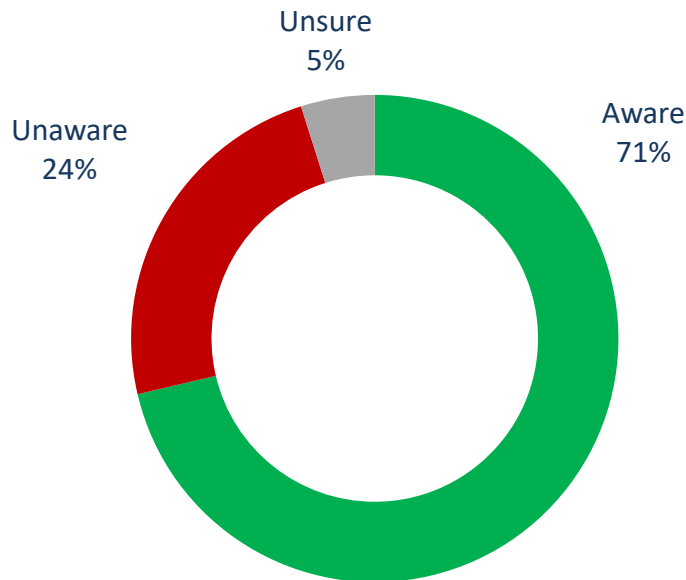
That most cell phone carriers have trade-in or programs that allow you to upgrade your cell phone

Subgroups	Aware
Newfoundland and Labrador (n=300)	72.8%
New Brunswick (n=300)	73.4%
Nova Scotia (n=300)	78.9%
Prince Edward Island (n=300)	84.5%
Quebec (n=300)	68.9%
Ontario (n=300)	77.7%
Manitoba (n=300)	74.4%
Saskatchewan (n=300)	81.5%
Alberta (n=300)	79.7%
British Columbia (n=300)	80.5%
18 to 34 (n=644)	79.0%
35 to 54 (n=1017)	74.8%
55 plus (n=1339)	75.0%
Male (n=1577)	75.8%
Female (n=1423)	76.3%
Urban (n=2249)	76.6%
Rural (n=751)	73.2%

Awareness that cell phones received through trade-in programs are recycled or reused

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=2308 (respondents who currently own a cell phone), accurate 2.0 percentage points plus or minus, 19 times out of 20. AWARE OF TRADE IN PROGRAMS ONLY.

Net Score
+47.6



*Note: Charts may not add up to 100 due to rounding

QUESTION – Are you aware or not aware of the following:

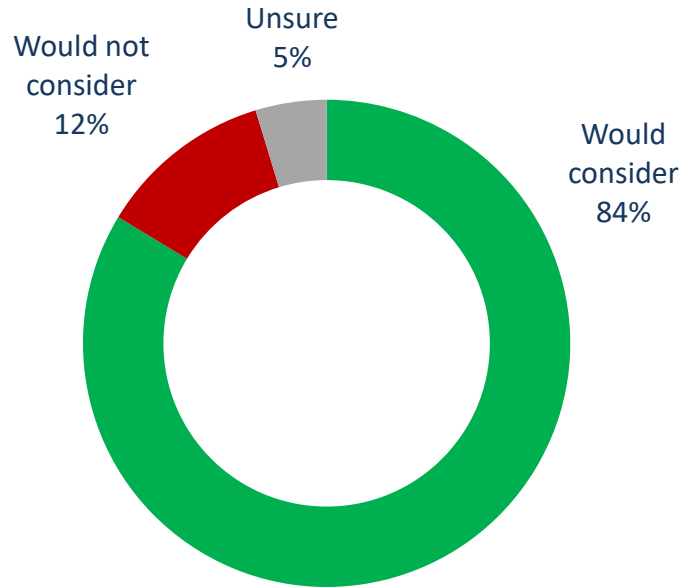
[AWARE OF TRADE IN PROGRAMS ONLY]
That cell phones received through trade-in and upgrade programs are recycled or reused

Subgroups	Aware
Newfoundland and Labrador (n=220)	69.6%
New Brunswick (n=221)	63.9%
Nova Scotia (n=236)	72.6%
Prince Edward Island (n=253)	69.8%
Quebec (n=208)	64.4%
Ontario (n=232)	73.4%
Manitoba (n=222)	74.5%
Saskatchewan (n=243)	82.0%
Alberta (n=236)	73.8%
British Columbia (n=237)	72.3%
18 to 34 (n=519)	67.5%
35 to 54 (n=790)	75.4%
55 plus (n=999)	70.7%
Male (n=1218)	76.0%
Female (n=1090)	67.0%
Urban (n=1733)	70.0%
Rural (n=575)	79.1%

Considering recycling cell phone

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Net Score
+72.1



*Note: Charts may not add up to 100 due to rounding

QUESTION – If you knew where to recycle your cell phone, would you consider or not consider recycling it?

Subgroups	Would consider
Newfoundland and Labrador (n=300)	86.1%
New Brunswick (n=300)	86.4%
Nova Scotia (n=300)	83.7%
Prince Edward Island (n=300)	88.2%
Quebec (n=300)	83.8%
Ontario (n=300)	85.1%
Manitoba (n=300)	82.1%
Saskatchewan (n=300)	80.8%
Alberta (n=300)	82.1%
British Columbia (n=300)	80.8%
18 to 34 (n=644)	78.6%
35 to 54 (n=1017)	84.4%
55 plus (n=1339)	86.5%
Male (n=1577)	83.1%
Female (n=1423)	84.2%
Urban (n=2249)	83.6%
Rural (n=751)	83.8%

Reasons for considering recycling cell phones - Tracking

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=3003 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Top mentions	2017 (n=3000)	2016 (n=3003)
For the environment/I recycle everything/Waste to throw it away/Right thing to do	55.7%	55.8%
No use for it so can recycle it/better than having it laying around/de-clutter/get rid of it	12.5%	7.8%
There is important information on my phone (messages, pictures)/security reasons/work phone	6.4%	5.7%
Give to people who can use it (friends, family, donation)/My children use it as a toy	5.2%	6.1%
Need it as a backup/I like to keep my phone/Still useful	6.1%	6.3%
I would sell it, trade or exchange it to a phone company/Would rather get money out of it	2.8%	3.8%
Depends on how convenient it is for me/No time/No recycling center near me	2.1%	1.2%
I never thought about recycling before/If I knew what to do with it	1.6%	1.5%
I don't want to recycle/waste of money	0.8%	-
Phone is worn out/too damaged/too old	0.8%	-
I don't know where the recycled phones are going/shipped to another country	0.2%	-
Other	3.9%	4.9%
Unsure	1.7%	1.1%

QUESTION – Why do you have that opinion? [Open-ended]

Encouraging cell phone recycling

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=2859 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=1215 (respondents who currently own a cell phone), accurate 2.8 percentage points plus or minus, 19 times out of 20. IF STORED PHONE ONLY.

Reasons that encourage cell phone recycling	Year		
	2017 (n=3000)*	2016 (n=2859)*	2015 (n=1215)**
Cash/Money/Rebate	22.6%	21.3%	19.7%
Ease of recycling/returning	14.5%	17.0%	7.2%
No encouragement needed/already do	9.1%	7.1%	-
Knowing where/how I can return it	9.2%	8.3%	13.1%
Environmental reasons/avoid landfills	8.4%	12.6%	5.7%
No longer needing/wanting the phone	7.6%	10.0%	15.4%
If I was confident all my data/information had been removed	6.7%	3.7%	7.6%
Nothing	5.3%	5.4%	7.1%
If I knew/approved of where it was going	3.1%	5.2%	3.1%
If I need room/need to clear up clutter	2.8%	1.4%	2.1%
Advertisement/reminder/awareness campaign	1.4%	1.2%	-
Other	2.5%	2.0%	11.1%
Unsure	6.6%	5.0%	7.9%

*Asked all participants

**Asked only those who reported storing their phone

QUESTION – What would encourage you to recycle **your cell phone**? [Open-ended] (2017 and 2016 Waves)

QUESTION – [IF Storing phone only] What would encourage you to recycle or return it? [Open-ended] (2015 Wave)

Encouraging cell phone recycling - by demographic and province

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Top-5 Mentions	Total (n=3000)	Region		Age			Gender	
		Urban (n=2249)	Rural (n=751)	18 to 34 (n=644)	35 to 54 (n=1017)	55 plus (n=1339)	Male (n=1557)	Female (n=1423)
Cash/Money/Rebate	22.6%	22.5%	23.6%	27.3%	23.9%	18.2%	31.2%	14.6%
Ease of recycling/returning	14.5%	15.3%	9.9%	18.6%	14.9%	11.2%	13.6%	15.3%
No encouragement needed/already do	9.1%	9.5%	7.4%	5.9%	10.1%	10.5%	8.7%	9.6%
Knowing where/how I can return it	9.2%	9.3%	8.4%	5.1%	7.9%	13.2%	7.5%	10.8%
Environmental reasons/avoid landfills	8.4%	8.2%	9.4%	7.0%	8.4%	9.4%	8.0%	8.8%

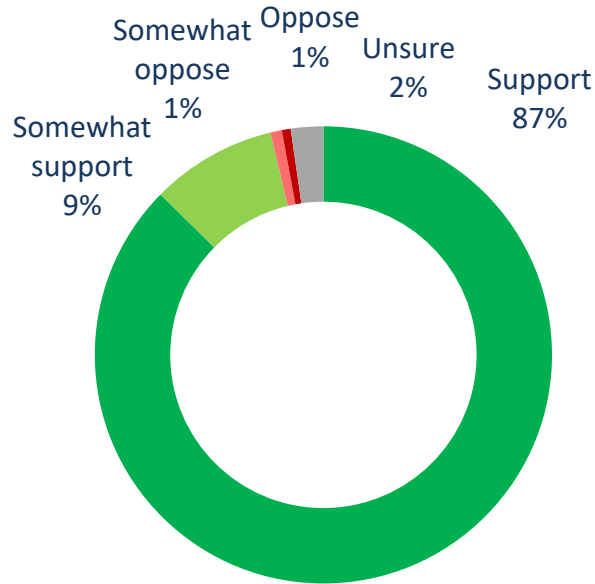
Top-5 Mentions	Total (n=3000)	Province									
		NFLD (n=300)	NB (n=300)	NS (n=300)	PEI (n=300)	QC (n=300)	ON (n=300)	MB (n=300)	SK (n=300)	AB (n=300)	BC (n=300)
Cash/Money/Rebate	22.6%	24.2%	24.0%	27.0%	18.4%	17.2%	24.6%	29.1%	24.1%	25.3%	21.1%
Ease of recycling/returning	14.5%	17.3%	14.2%	13.6%	9.9%	11.7%	18.3%	13.5%	11.7%	11.5%	11.7%
No encouragement needed/already do	9.1%	6.6%	7.6%	11.0%	10.6%	9.9%	7.8%	9.1%	13.1%	8.6%	11.5%
Knowing where/how I can return it	9.2%	12.8%	12.6%	8.1%	9.8%	4.1%	11.2%	11.5%	11.6%	10.4%	9.4%
Environmental reasons/avoid landfills	8.4%	7.5%	7.2%	4.8%	12.2%	14.8%	6.6%	5.5%	6.0%	5.4%	7.0%

QUESTION – What would encourage you to recycle your cell phone? [Open-ended]

Support for cell phone recycling

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- Canadians support or somewhat support programs that encourage the recycling of old, unused or unwanted cell phones (87% support; 9% somewhat support).



*Note: Charts may not add up to 100 due to rounding

QUESTION – Do you support, somewhat support, somewhat oppose or oppose programs that encourage the recycling of old, unused or unwanted cell phones?

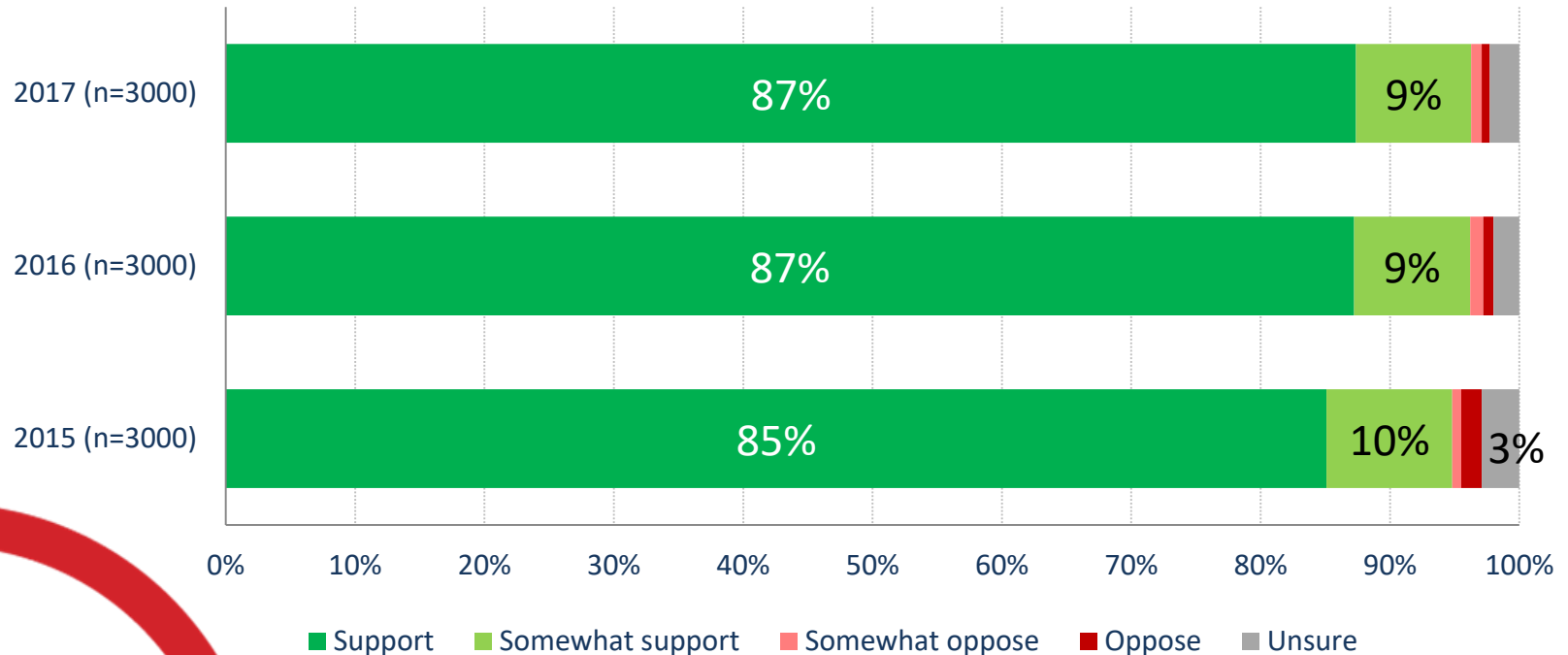
Subgroups	Support/ Somewhat support
Newfoundland and Labrador (n=300)	97.6%
New Brunswick (n=300)	97.7%
Nova Scotia (n=300)	95.1%
Prince Edward Island (n=300)	96.9%
Quebec (n=300)	97.0%
Ontario (n=300)	96.5%
Manitoba (n=300)	95.7%
Saskatchewan (n=300)	96.3%
Alberta (n=300)	94.9%
British Columbia (n=300)	95.5%
18 to 34 (n=644)	95.3%
35 to 54 (n=1017)	97.0%
55 plus (n=1339)	96.4%
Male (n=1577)	95.2%
Female (n=1423)	97.3%
Urban (n=2249)	96.2%
Rural (n=751)	96.7%

Support for cell phone recycling – by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.



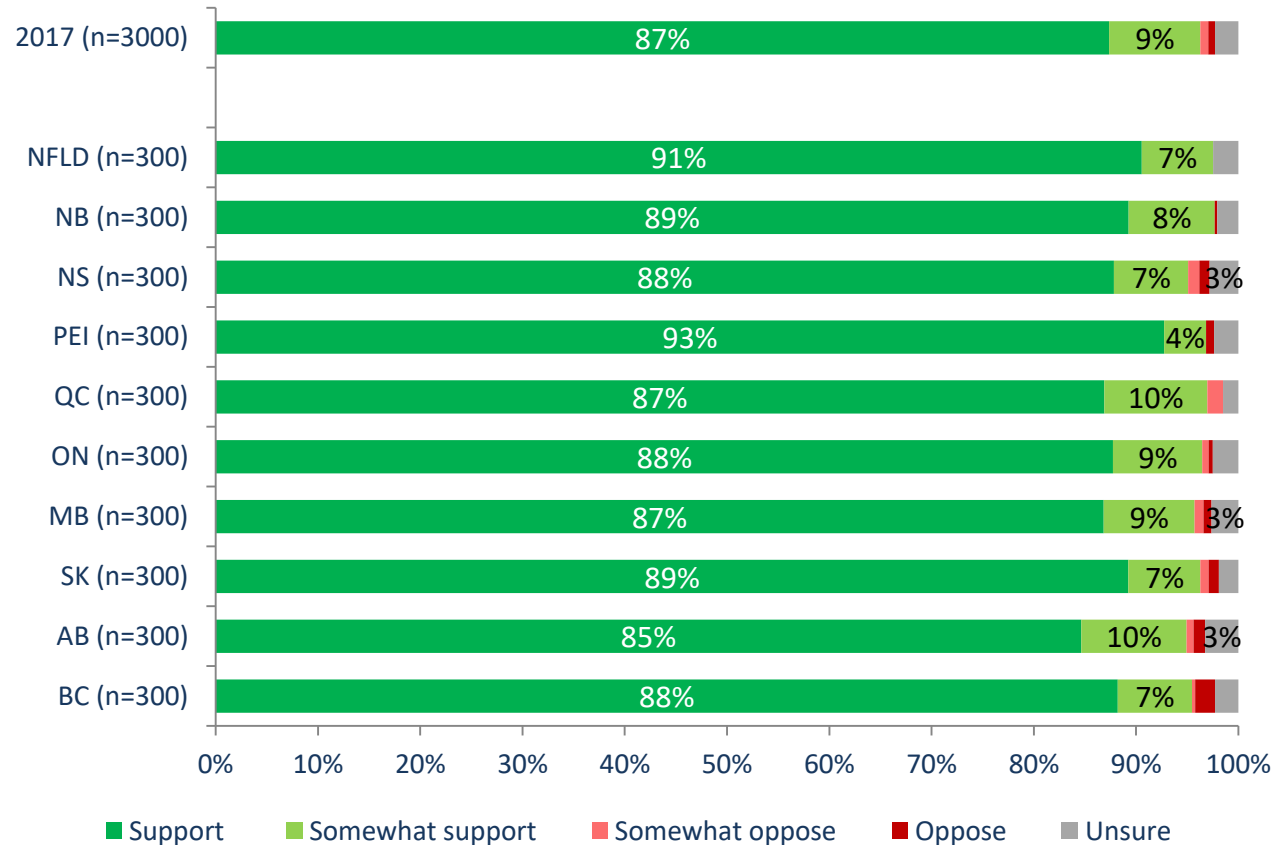
*Note: Charts may not add up to 100 due to rounding

QUESTION – Do you support, somewhat support, somewhat oppose or oppose programs that encourage the recycling of old, unused or unwanted cell phones?

Support for cell phone recycling - by province

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- Support for programs that encourage the recycling of old, unused or unwanted cell phones is strong across all provinces.



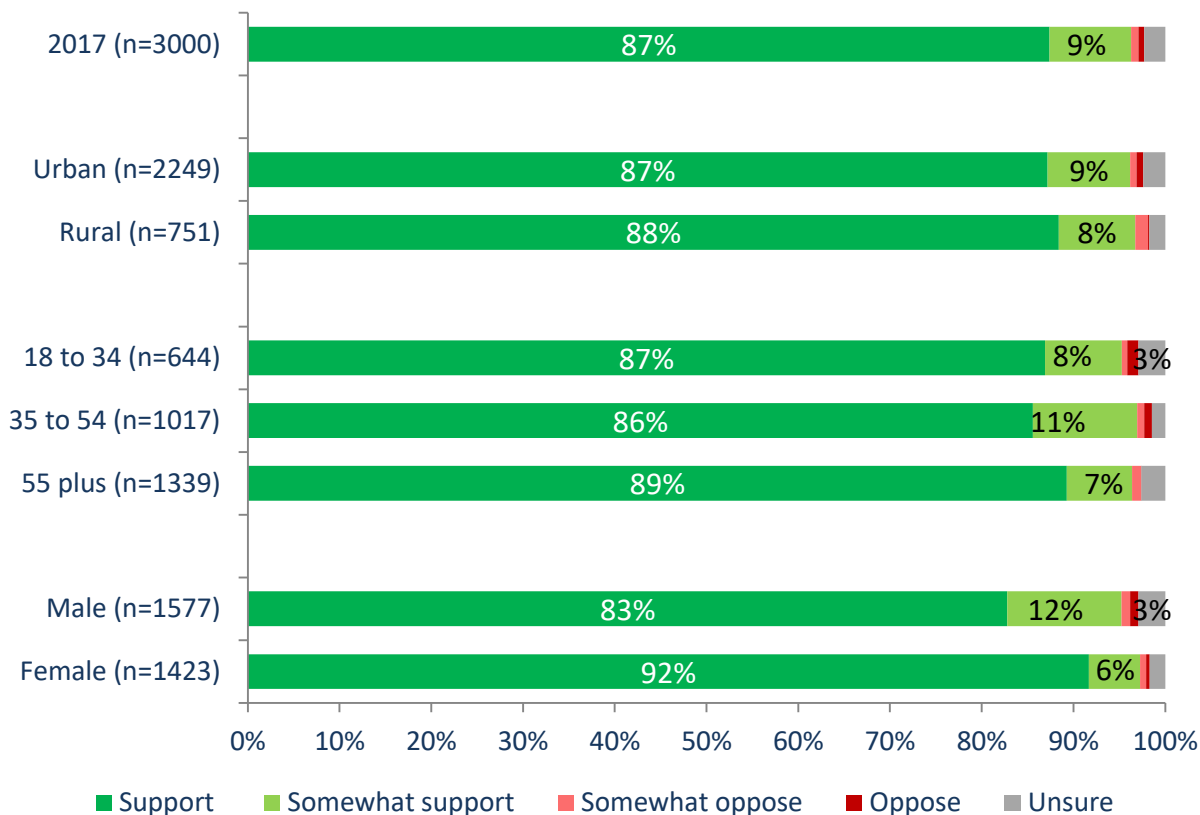
***Note:** Charts may not add up to 100 due to rounding

QUESTION – Do you support, somewhat support, somewhat oppose or oppose programs that encourage the recycling of old, unused or unwanted cell phones?

Support for cell phone recycling - by demographics

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- Support for programs that encourage the recycling of old, unused or unwanted cell phones is strong across all demographics, especially among women (92% support).



*Note: Charts may not add up to 100 due to rounding

QUESTION – Do you support, somewhat support, somewhat oppose or oppose programs that encourage the recycling of old, unused or unwanted cell phones?

2.0 Cell phone disposal



Previous cell phone: storage vs disposal

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

	Frequency (n=3000)
Store it away	42.9%
Give away the last cell phone you owned	15.9%
Recycle it	11.5%
Return or trade in to your cell phone carrier	10.5%
Return it to a store/retailer	3.8%
Sell the last cell phone you owned	3.0%
I use it for other purposes (alarm clock, music, etc.)	2.6%
I lost it/broken/stolen	1.8%
Donate it to charity	1.3%
Threw it away in the garbage	1.0%
I returned it to my employer	1.5%
Other mentions	0.2%
Unsure	3.8%

QUESTION – After receiving your current phone what did you do with your old one?
Did you... [RANDOMIZE]

Subgroups	Store it away
Newfoundland and Labrador (n=300)	51.8%
New Brunswick (n=300)	48.4%
Nova Scotia (n=300)	42.9%
Prince Edward Island (n=300)	37.9%
Quebec (n=300)	40.7%
Ontario (n=300)	44.6%
Manitoba (n=300)	45.5%
Saskatchewan (n=300)	47.0%
Alberta (n=300)	44.4%
British Columbia (n=300)	36.7%
18 to 34 (n=644)	43.2%
35 to 54 (n=1017)	42.4%
55 plus (n=1339)	43.1%
Male (n=1577)	45.9%
Female (n=1423)	40.0%
Urban (n=2249)	41.7%
Rural (n=751)	49.5%

Previous cell phone: storage vs disposal - by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- Over two fifths of participants stored away their previous cell phone (43%), while 16 per cent gave away their phone and 12 per cent recycled it. Eleven per cent returned or traded in their cell phone to their carrier.
- Consumer behaviour regarding their old cell phone status has remained consistent overall.

After receiving your current cell phone, what did you do with your old one? Did you...	Year		
	2017 (n=3000)	2016 (n=3000)	2015 (n=3000)
Store it away	42.9%	43.4%	41.2%
Give away the last cell phone you owned	15.9%	14.2%	15.9%
Recycle it	11.5%	11.9%	12.4%
Return or trade in to your cell phone carrier	10.5%	9.0%	10.1%
Return it to a store/retailer	3.8%	3.8%	2.2%
Sell the last phone you owned	3.0%	4.5%	3.2%
I use it for other purposes (alarm clock, music, kids toy, Wi-Fi)	2.6%	3.1%	2.3%
I lost it/broken/stolen	1.8%	1.9%	2.3%
Throw it away in the garbage	1.0%	1.8%	4.0%
Donate it to charity	1.3%	1.8%	2.0%
I returned it to my employer	1.5%	1.6%	1.2%
Unsure	3.8%	2.7%	3.2%

QUESTION – After receiving your current phone what did you do with your old one? Did you...
[RANDOMIZE]

Previous cell phone: storage vs disposal - by length of ownership

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

After receiving your current cell phone, what did you do with your old one? Did you...	Length of Previous Phone Ownership				
	1-12 months (n=328)	13-24 months (n=879)	25-36 months (n=845)	37-48 months (n=392)	More than 48 months (n=495)
Store it away	40.0%	40.7%	45.9%	45.5%	43.8%
Give away the last cell phone you owned	19.3%	21.0%	14.3%	8.9%	11.8%
Recycle it	8.5%	13.8%	9.4%	9.7%	14.2%
Return or trade in to your cell phone carrier	7.9%	8.3%	11.9%	10.1%	14.6%
Sell the last phone you owned	6.6%	1.7%	4.0%	3.5%	1.0%
I lost it/broke it/it was stolen	4.6%	1.5%	2.3%	0.3%	0.8%
Return it to a store/retailer	3.3%	3.1%	4.5%	4.9%	3.3%
Throw it away in the garbage	2.6%	0.5%	0.4%	0.2%	2.8%
I returned it to my employer	2.3%	1.8%	0.5%	3.0%	0.8%
Donate it to charity	0.7%	1.2%	1.0%	3.5%	1.1%
I use it for other purposes (alarm clock, music, kids toy, Wi-Fi)	0.8%	2.4%	3.1%	4.8%	1.1%
Unsure	3.1%	3.6%	2.5%	4.9%	3.7%

QUESTION – After receiving your current phone what did you do with your old one? Did you...
[RANDOMIZE]

Previous cell phone: storage vs disposal - by province

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

After receiving your current cell phone, what did you do with your old one? Did you...	Total (n=3000)	Province									
		NFLD (n=300)	NB (n=300)	NS (n=300)	PEI (n=300)	QC (n=300)	ON (n=300)	MB (n=300)	SK (n=300)	AB (n=300)	BC (n=300)
Store it away	42.9%	51.8%	48.4%	42.9%	37.9%	40.7%	44.6%	45.5%	47.0%	44.4%	36.7%
Give away the last cell phone you owned	15.9%	12.9%	15.8%	13.7%	16.0%	19.6%	14.9%	12.2%	13.0%	14.4%	15.9%
Recycle it	11.5%	7.3%	9.2%	11.9%	13.8%	12.0%	10.1%	12.6%	10.4%	12.4%	14.7%
Return or trade in to your cell phone carrier	10.5%	10.6%	12.1%	11.3%	7.6%	10.9%	10.7%	9.4%	13.8%	9.4%	9.6%
Return it to a store/retailer	3.8%	3.2%	1.0%	2.4%	4.1%	3.8%	4.4%	2.6%	4.9%	4.0%	3.0%
Sell the last phone you owned	3.0%	3.2%	4.5%	4.2%	6.6%	2.1%	2.9%	2.8%	1.6%	4.0%	3.6%
I use it for other purposes (alarm clock, music, kids toy, Wi-Fi)	2.6%	3.8%	0.7%	3.6%	2.3%	1.7%	2.6%	4.0%	3.1%	3.1%	3.4%
I lost it/broke it/it was stolen	1.8%	1.6%	0.0%	3.2%	1.9%	1.2%	1.7%	3.1%	1.3%	1.4%	3.1%
I returned it to my employer	1.5%	0.9%	1.3%	0.3%	1.7%	1.0%	2.1%	1.3%	0.3%	1.4%	1.1%
Donate it to charity	1.3%	0.9%	0.9%	2.4%	2.5%	1.1%	1.3%	0.9%	1.0%	0.9%	2.4%
Throw it away in the garbage	1.0%	1.9%	2.0%	1.0%	3.2%	0.6%	1.2%	1.1%	0.7%	0.7%	1.4%
Unsure	3.8%	1.8%	3.5%	2.7%	2.3%	4.6%	3.4%	3.4%	2.3%	3.9%	4.3%

QUESTION – After receiving your current phone what did you do with your old one? Did you...
[RANDOMIZE]

Previous cell phone: storage vs disposal - by demographic

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

After receiving your current cell phone, what did you do with your old one? Did you...	Total (n=3000)	Region		Age			Gender	
		Urban (n=2249)	Rural (n=751)	18 to 34 (n=644)	35 to 54 (n=1017)	55 plus (n=1339)	Male (n=1577)	Female (n=1423)
Store it away	42.9%	41.7%	49.5%	43.2%	42.4%	43.1%	45.9%	40.0%
Give away the last cell phone you owned	15.9%	16.5%	12.5%	20.5%	18.2%	10.6%	13.4%	18.2%
Recycle it	11.5%	11.5%	11.3%	8.4%	13.7%	11.6%	10.1%	12.8%
Return or trade in to your cell phone carrier	10.5%	10.9%	8.8%	10.0%	8.4%	12.8%	10.4%	10.7%
Return it to a store/retailer	3.8%	4.2%	1.8%	2.8%	3.0%	5.3%	4.7%	3.0%
Sell the last phone you owned	3.0%	2.9%	3.2%	5.9%	2.6%	1.3%	3.7%	2.3%
I use it for other purposes (alarm clock, music, kids toy, Wi-Fi)	2.6%	2.6%	2.6%	3.7%	2.1%	2.3%	3.1%	2.2%
I lost it/broke it/it was stolen	1.8%	1.7%	1.8%	1.6%	1.4%	2.2%	1.1%	2.4%
I returned it to my employer	1.5%	1.3%	2.2%	0.6%	2.7%	1.0%	2.1%	0.9%
Donate it to charity	1.3%	1.3%	1.4%	1.0%	2.0%	1.0%	1.4%	1.2%
Throw it away in the garbage	1.0%	0.9%	1.6%	0.4%	1.1%	1.4%	1.3%	0.8%
Unsure	3.8%	3.9%	3.1%	1.4%	2.1%	7.0%	2.6%	4.9%

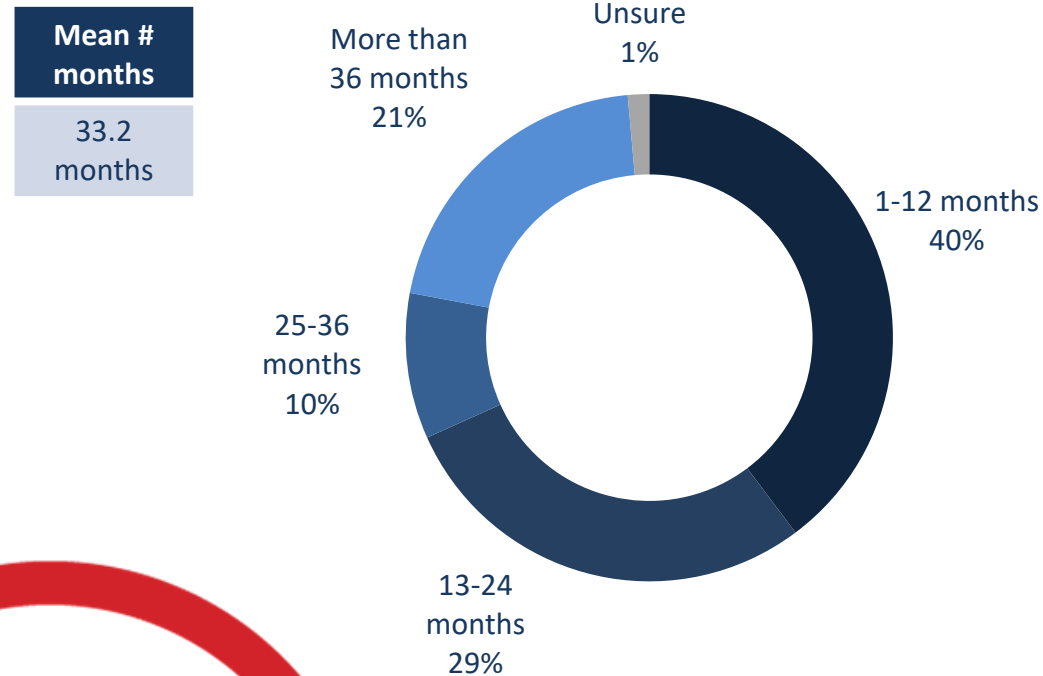
QUESTION – After receiving your current phone what did you do with your old one? Did you...
[RANDOMIZE]

3.0 Cell phone storage



Storage period

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=1289 (respondents who currently own a cell phone), accurate 2.7 percentage points plus or minus, 19 times out of 20. IF STORED PHONE ONLY.



*Note: Charts may not add up to 100 due to rounding

QUESTION – [IF STORED PHONE] For how long have you been storing your old cell phone? (enter # months) [Open-ended]

Subgroups	1-12 months
Newfoundland and Labrador (n=151)	41.1%
New Brunswick (n=141)	39.6%
Nova Scotia (n=127)	43.9%
Prince Edward Island (n=112)	49.0%
Quebec (n=120)	46.6%
Ontario (n=133)	32.0%
Manitoba (n=133)	39.2%
Saskatchewan (n=135)	43.8%
Alberta (n=129)	39.8%
British Columbia (n=108)	52.9%
18 to 34 (n=280)	44.6%
35 to 54 (n=447)	39.3%
55 plus (n=562)	36.6%
Male (n=702)	36.7%
Female (n=587)	43.0%
Urban (n=946)	39.5%
Rural (n=343)	40.9%

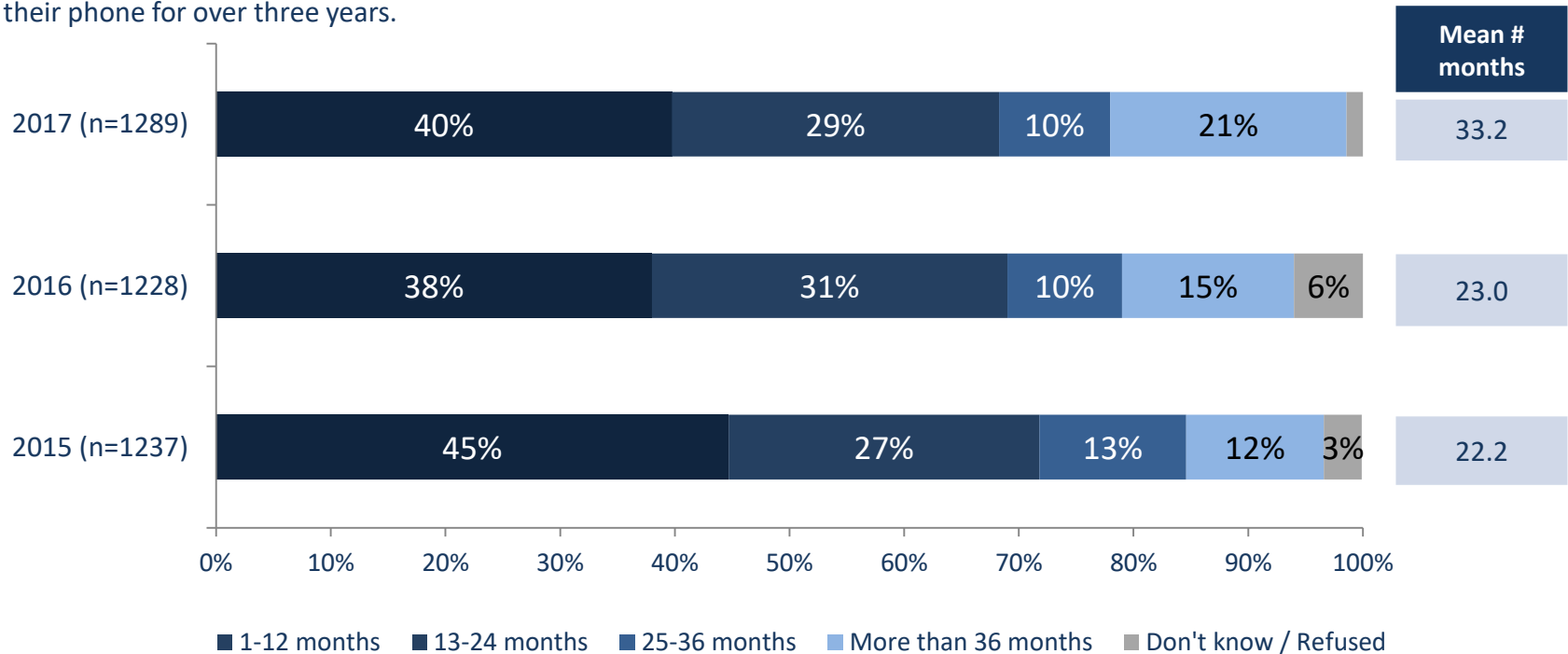
Storage period

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=1289 (respondents who currently own a cell phone), accurate 2.7 percentage points plus or minus, 19 times out of 20. IF STORED PHONE ONLY.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=1228 (respondents who currently own a cell phone), accurate 2.8 percentage points plus or minus, 19 times out of 20. IF STORED PHONE ONLY.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=1237 (respondents who currently own a cell phone), accurate 2.8 percentage points plus or minus, 19 times out of 20. IF STORED PHONE ONLY.

- Forty per cent of participants have stored their phone for a year or less, while 29 per cent have stored their phone for 1-2 years. Ten per cent have stored their phone for 25-36 months and 21 per cent have stored their phone for over three years.

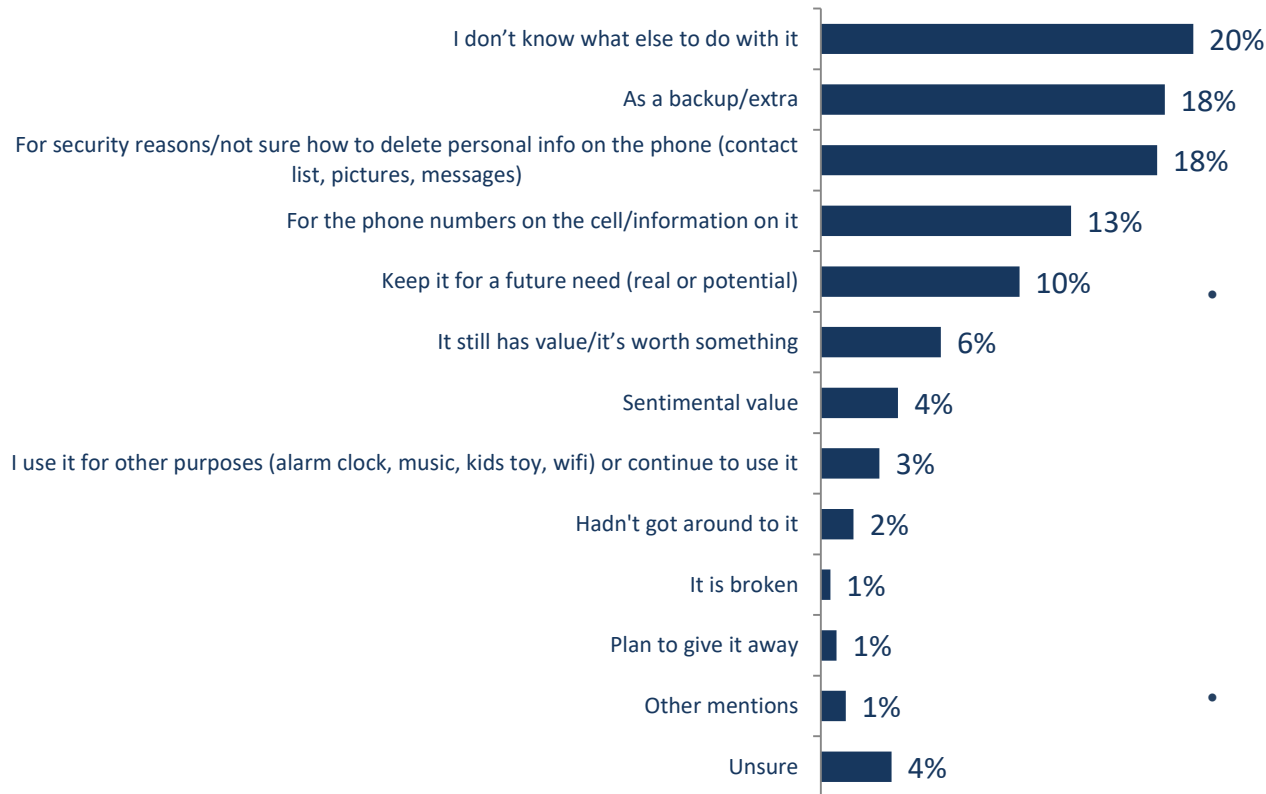


***Note:** Charts may not add up to 100 due to rounding

QUESTION – [IF STORED PHONE] For how long have you been storing your old cell phone? (enter # months)
[Open-ended]

Reasons for keeping prior cell phone

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=1289 (respondents who currently own a cell phone), accurate 2.7 percentage points plus or minus, 19 times out of 20. IF STORED PHONE ONLY.



- Two in ten Canadians keep their old phone because they don't know what else to do with it (20%), while 18 per cent each keep it as a backup phone or for security reasons. Thirteen per cent keep it for the information on it and 10 per cent in case of a future need (real or potential).
- A few others say it still has value (six per cent), or just keep their old phone for sentimental value (four per cent).

*Note: Charts may not add up to 100 due to rounding

*Based on multiple mentions

QUESTION – [IF STORED PHONE] Why did you keep your old phone? [Open-ended][Select all that apply]

Reasons for not recycling prior cell phone – by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=1289 (respondents who currently own a cell phone), accurate 2.7 percentage points plus or minus, 19 times out of 20. IF STORED PHONE ONLY.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=1228 (respondents who currently own a cell phone), accurate 2.5 percentage points plus or minus, 19 times out of 20. IF STORED PHONE ONLY.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=1237 (respondents who currently own a cell phone), accurate 2.8 percentage points plus or minus, 19 times out of 20. IF STORED PHONE ONLY.

- Participants in 2017 most frequently reported that they kept their old phone because they don't know what else to do with it (20%), keep it as a backup/extra (18%), for security reasons (18%), for the phone numbers/information on it (13%), or keep it for a future need (10%).
- However, they are less likely to use it for other purposes (3%), keep it because it is still worth something (6%) or because of sentimental value (4%).

Why did you keep your old phone?	Year		
	2017 (n=1289)*	2016 (n=1228)*	2015 (n=1237)*
I don't know what else to do with it	19.5%	26.3%	24.8%
As a backup/extra	18.0%	23.1%	17.6%
For security reasons/Not sure how to delete personal info on the phone (contact list, pictures, messages)	17.6%	10.6%	7.7%
For the phone numbers/information on it	13.1%	15.6%	12.0%
Keep it for a future need (real or potential)	10.4%	14.7%	10.9%
It still has value/it's worth something	6.3%	5.3%	3.2%
Sentimental value	4.0%	4.8%	3.6%
I use it for other purposes (alarm clock, music, kids toy, Wi-Fi)	3.1%	7.1%	6.3%
Other responses	4.3%	6.3%	6.7%
Unsure	3.7%	2.8%	3.3%

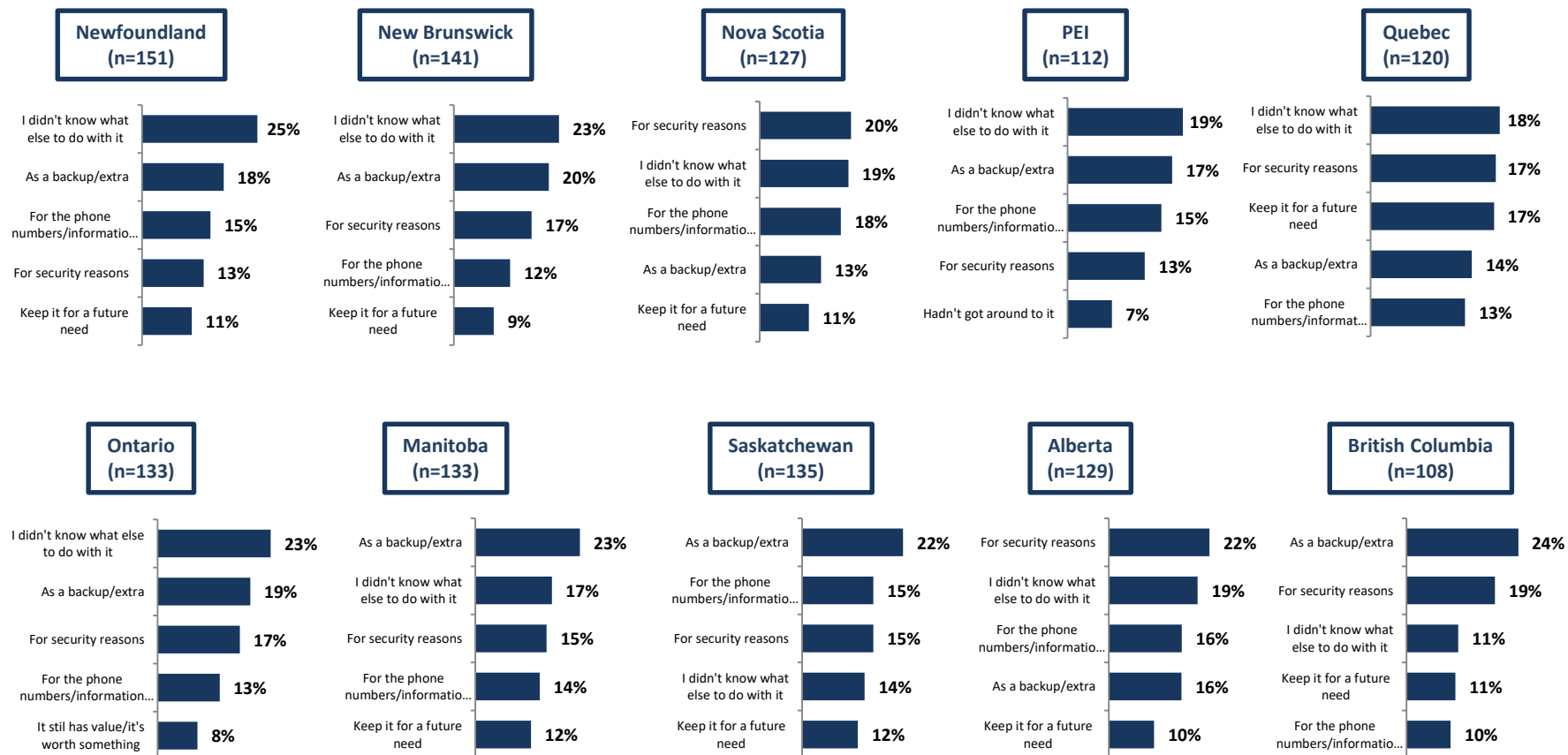
*Based on multiple mentions

QUESTION – [IF STORED PHONE] Why did you keep your old phone? [Open-ended]
[Select all that apply]

Reasons for not recycling prior cell phone – top responses by province

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=1289 (respondents who currently own a cell phone), accurate 2.7 percentage points plus or minus, 19 times out of 20. IF STORED PHONE ONLY.

- Due to the small sample sizes, no significant differences can be noted.



QUESTION – [IF STORED PHONE] Why did you keep your old phone? [Open-ended]
 [Select all that apply]

4.0 Cell phone recycling



Approaches used for cell phone recycling

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=336 (respondents who currently own a cell phone), accurate 5.4 percentage points plus or minus, 19 times out of 20. IF RECYCLED PHONE ONLY.

	Frequency (n=336)
Took it to a depot for special/hazardous waste	35.3%
Cell phone recycling program with a cellular service provider (e.g. Bell, Rogers, TELUS, SaskTel, MTS, Virgin, Fido...	27.4%
Cell phone recycling program through a retail store, e.g. Staples, Best Buy, etc.	16.6%
Recycle My Cell Program	10.1%
Curbside recycling box (e.g. blue box or green box)	5.4%
Donated to charity	1.4%
Local waste management program	1.3%
Used a mail back program	1.2%
Returned to my employer	0.7%
Give it to a family member to recycle	0.3%
Through my library	0.2%

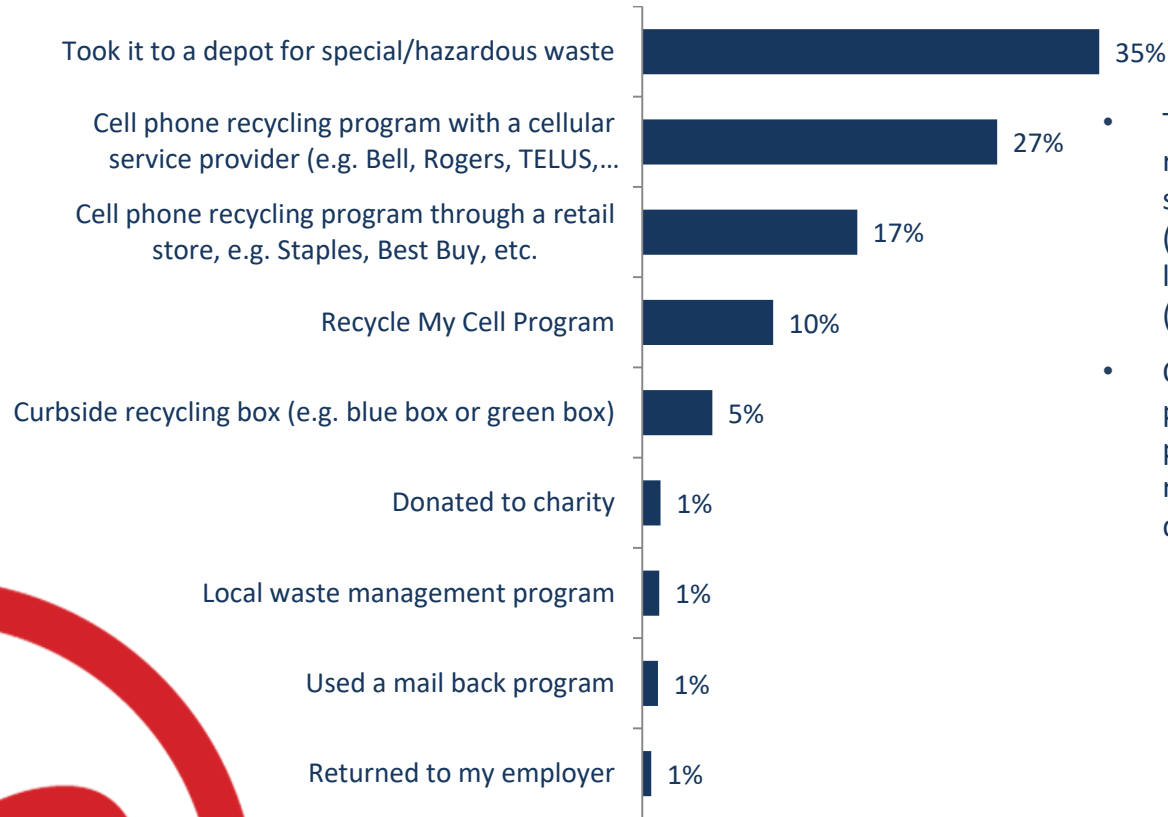
Subgroups	Took to a depot
Newfoundland and Labrador (n=21)*	43.2%
New Brunswick (n=27)*	43.2%
Nova Scotia (n=35)	52.7%
Prince Edward Island (n=39)	30.3%
Quebec (n=33)	31.7%
Ontario (n=30)	33.5%
Manitoba (n=37)	42.8%
Saskatchewan (n=32)	19.4%
Alberta (n=36)	23.1%
British Columbia (n=46)	50.2%
18 to 34 (n=59)	25.4%
35 to 54 (n=117)	28.7%
55 plus (n=160)	47.6%
Male (n=175)	37.6%
Female (n=161)	33.6%
Urban (n=245)	33.3%
Rural (n=91)	45.7%

*Shaded due to small sample size

QUESTION – [IF RECYCLED PHONE] How did you recycle your old phone? [Open-ended]

Approaches used for cell phone recycling

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=336 (respondents who currently own a cell phone), accurate 5.4 percentage points plus or minus, 19 times out of 20. IF RECYCLED PHONE ONLY.



- The most common approaches to recycle old phones are through a special/hazardous waste depot (35%) and those through programs led by cellular service providers (27%) and retail stores (17%).
- Other approaches to recycling phones include the Recycle My Cell program (10%), a curbside recycling box (five per cent), and donating to charity (one per cent).

***Note:** Charts may not add up to 100 due to rounding

QUESTION – [IF RECYCLED PHONE] How did you recycle your old phone? [Open-ended]

Approaches used for cell phone recycling - top responses by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=336 (respondents who currently own a cell phone), accurate 5.4 percentage points plus or minus, 19 times out of 20. IF RECYCLED PHONE ONLY.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=319 (respondents who currently own a cell phone), accurate 5.6 percentage points plus or minus, 19 times out of 20. RECYCLED PHONE ONLY.

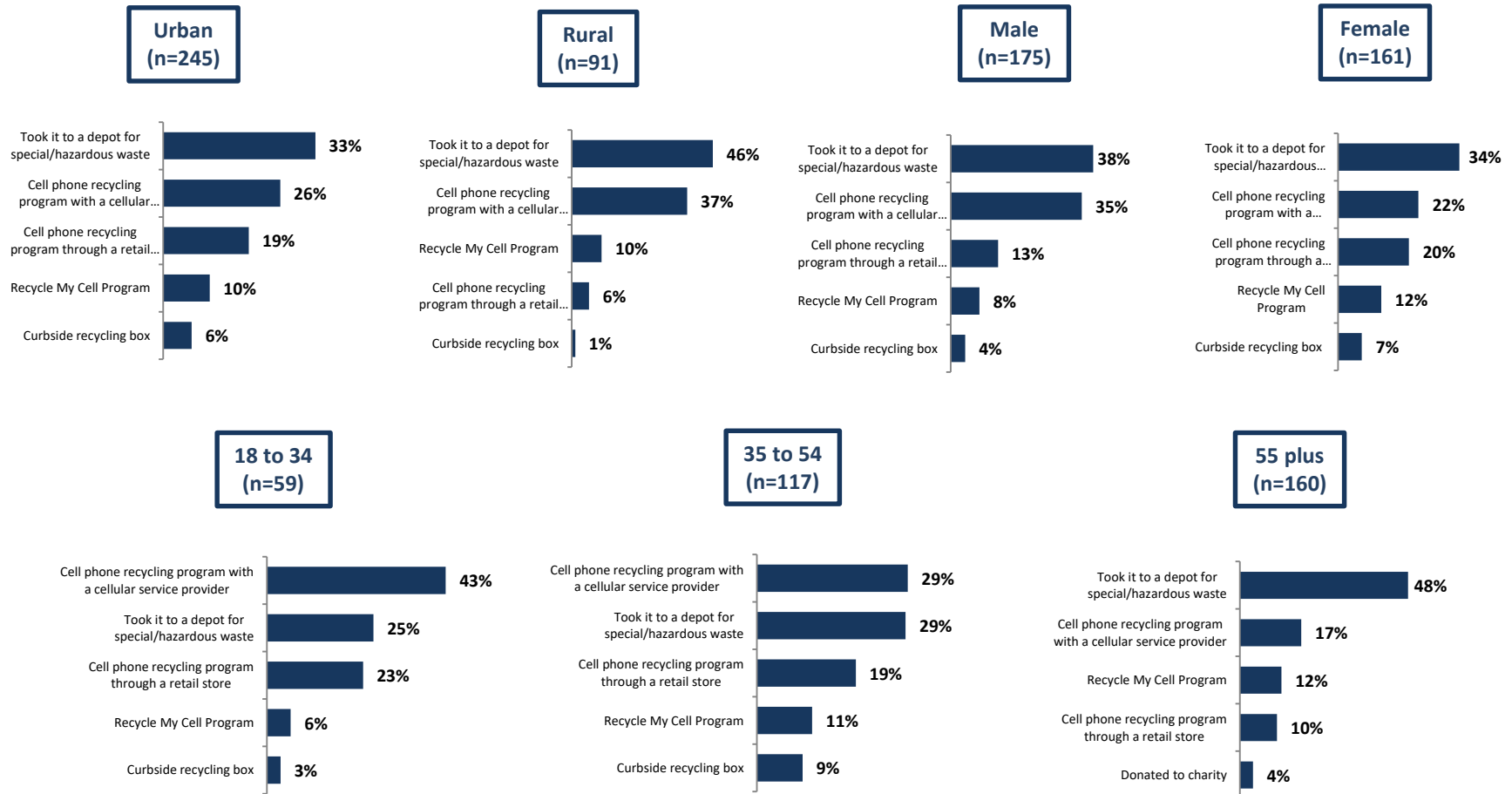
Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=376 (respondents who currently own a cell phone), accurate 5.2 percentage points plus or minus, 19 times out of 20. RECYCLED PHONE ONLY.

Mentions for keeping old phone	Year		
	2017 (n=336)	2016 (n=319)	2015 (n=376)
Took it to a depot for special/hazardous waste	35.3%	25.6%	27.0%
Cell phone recycling program with a cellular service provider (e.g. Bell, Rogers, TELUS, SaskTel MTS, Virgin, Fido, Wind, Koodo, Videotron, TBayTel)	27.4%	23.0%	26.6%
Cell phone recycling program through a retail store (e.g. Staples, Best Buy, etc. (This does not include cell phone service provider stores)	16.6%	22.3%	20.8%
Recycle My Cell Program	10.1%	7.9%	-
Curbside recycling box (e.g. blue box or green box)	5.4%	5.4%	6.9%
Through a charity drive	1.4%	2.4%	3.3%
Other mentions	3.7%	0.3%	4.3%
Unsure	-	5.2%	6.3%

QUESTION – [IF RECYCLED PHONE] How did you recycle your old phone? [Open-ended]

Approaches used for cell phone recycling - top responses by demographic

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=336 (respondents who currently own a cell phone), accurate 5.4 percentage points plus or minus, 19 times out of 20. IF RECYCLED PHONE ONLY.



QUESTION – [IF RECYCLED PHONE] How did you recycle your old phone? [Open-ended]

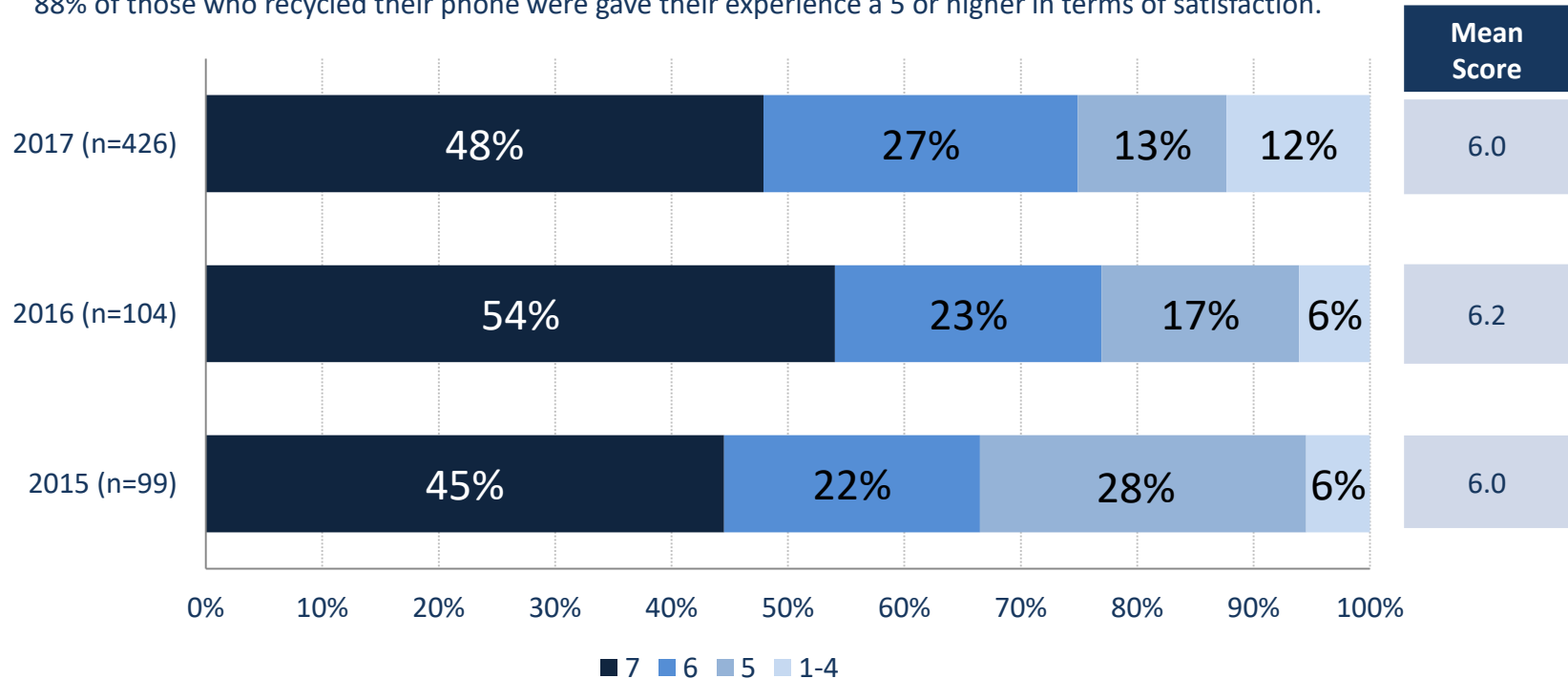
Satisfaction with cell recycling experience – by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=426 (respondents who currently own a cell phone), accurate 4.8 percentage points plus or minus, 19 times out of 20. IF USED CELLULAR PROVIDER, RECYCLE MY CELL, OR MAIL BACK TO RECYCLE CELL PHONE.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, 2016, n=104 (respondents who currently own a cell phone), accurate 9.8 percentage points plus or minus, 19 times out of 20. IF USED CELLULAR PROVIDER, RECYCLE MY CELL, OR MAIL BACK TO RECYCLE CELL PHONE.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=99 (respondents who currently own a cell phone), accurate 10.0 percentage points plus or minus, 19 times out of 20. IF USED CELLULAR PROVIDER, RECYCLE MY CELL, OR MAIL BACK TO RECYCLE CELL PHONE.

- 88% of those who recycled their phone were gave their experience a 5 or higher in terms of satisfaction.



***Note:** Charts may not add up to 100 due to rounding

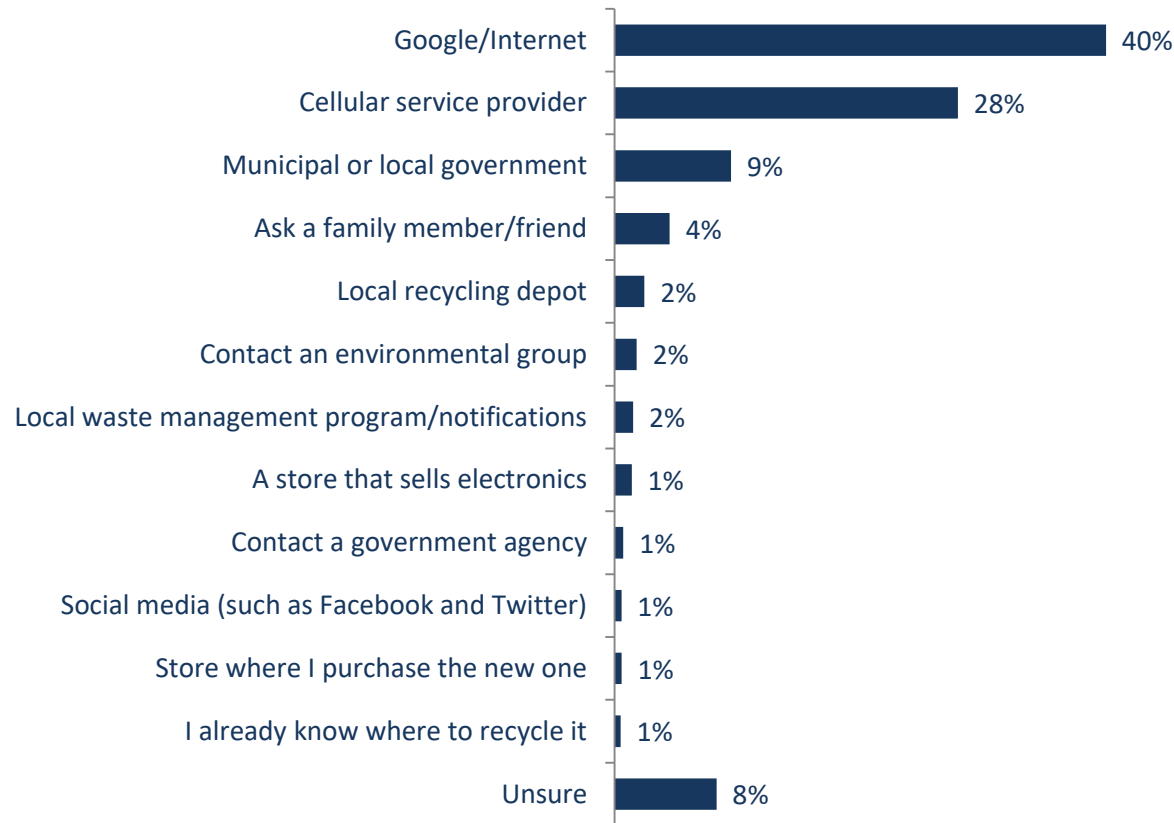
QUESTION – [IF USED cellular provider, Recycle My Cell or mail back program] How satisfied were you with this experience? Please use a scale from 1 to 7, where 1 is extremely dissatisfied and 7 is extremely satisfied.

5.0 Information gathering & awareness



Information about recycling – top mentions

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.



- Four in ten Canadians (40%) would first turn to Google for information if they were to consider recycling their old cell phone.
- More than one in four (28%) would go to their cellular service provider, while nine per cent would ask their municipal or local government.
- The remainder would seek information from a family member or friend (four per cent), their local depot, and environmental group, or a local waste management group (two per cent each).

***Note:** Charts may not add up to 100 due to rounding

QUESTION – If you were to consider recycling your old cell phone, where would you look for information?

Information about recycling – by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

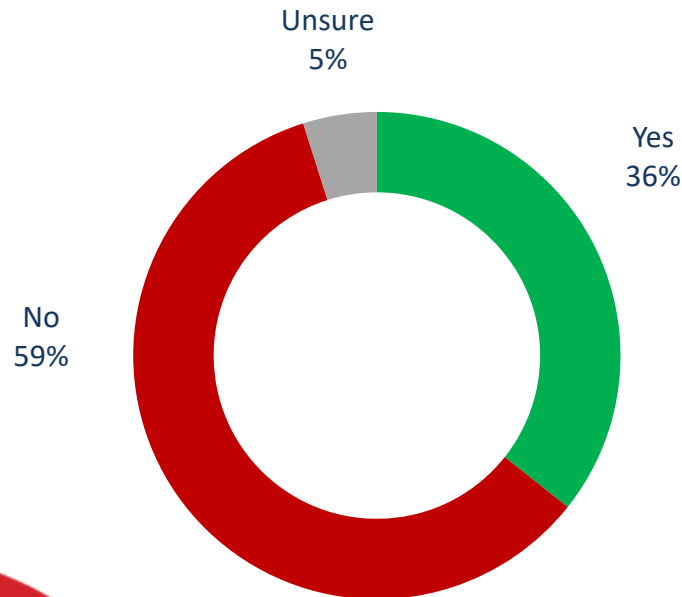
Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Mentions	Year		
	2017 (n=3000)	2016 (n=3000)	2015 (n=3000)
Google/Internet	39.6%	44.6%	45.0%
Cellular service provider	27.7%	26.2%	22.3%
Municipal or local government	9.4%	8.6%	8.9%
Ask a family member/friend	4.4%	4.1%	5.1%
Local recycling depot	2.4%	1.9%	2.3%
Contact an environmental group	1.8%	2.1%	1.8%
An electronics retailer	1.4%	1.9%	1.5%
Local waste management program/notifications	1.5%	-	-
Contact a government agency	0.7%	1.6%	1.6%
Social Media (such as Facebook and Twitter)	0.6%	1.4%	-
Other responses	2.3%	2.0%	4.3%
Unsure	8.2%	5.7%	7.2%

QUESTION – If you were to consider recycling your old cell phone, where would you look for information?

General awareness of recycling programs

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.



***Note:** Charts may not add up to 100 due to rounding

QUESTION – Are you aware of any recycling programs for old or unused cell phones?

Subgroups	Yes
Newfoundland and Labrador (n=300)	27.0%
New Brunswick (n=300)	33.5%
Nova Scotia (n=300)	32.2%
Prince Edward Island (n=300)	37.1%
Quebec (n=300)	35.0%
Ontario (n=300)	33.3%
Manitoba (n=300)	38.4%
Saskatchewan (n=300)	52.4%
Alberta (n=300)	36.6%
British Columbia (n=300)	40.8%
18 to 34 (n=644)	35.3%
35 to 54 (n=1017)	38.4%
55 plus (n=1339)	33.5%
Male (n=1577)	36.4%
Female (n=1423)	35.0%
Urban (n=2249)	35.4%
Rural (n=751)	37.0%

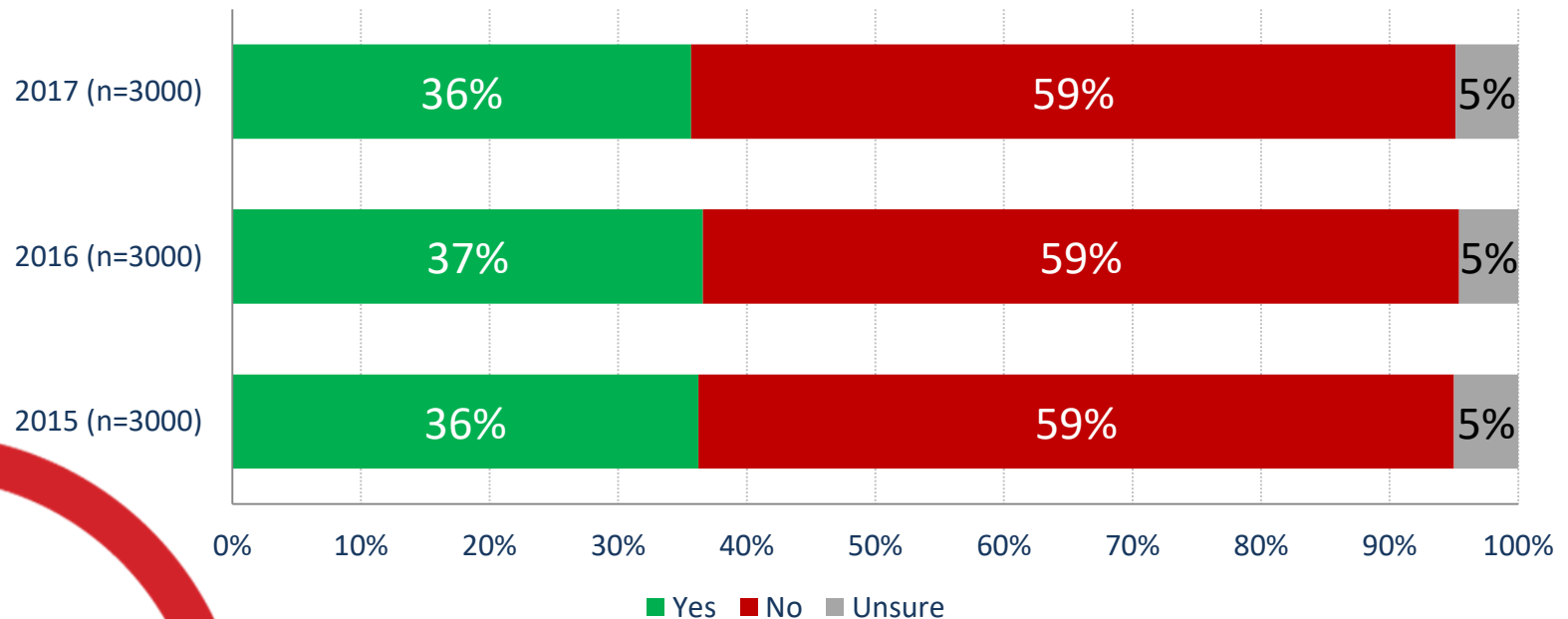
General awareness of recycling programs – by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- 36% of respondents are aware of recycling programs for unused cell phones, consistent with previous years.



*Note: Charts may not add up to 100 due to rounding

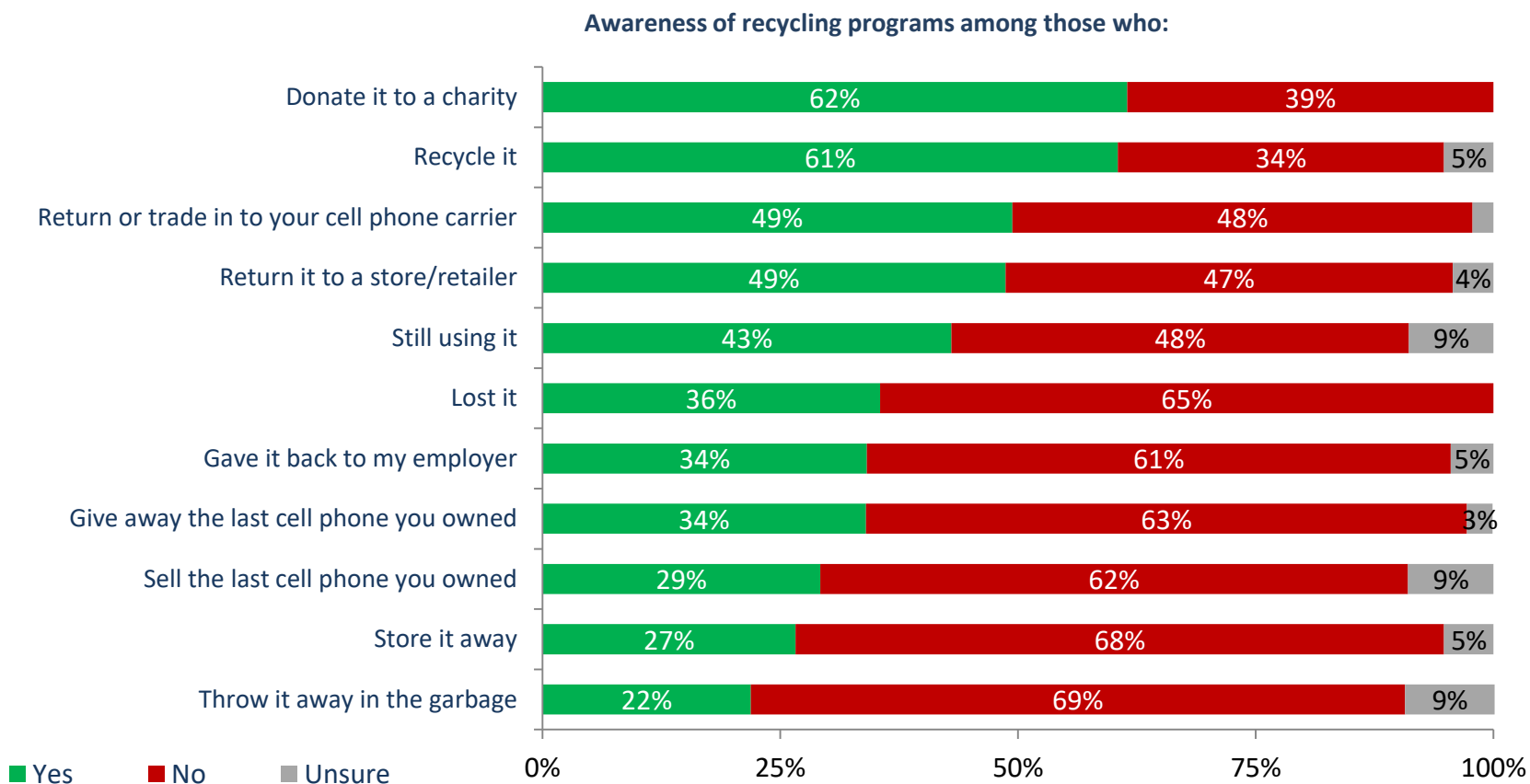
QUESTION – Are you aware of any recycling programs for **old or** unused cell phones?
(2017 and 2016 Waves)

QUESTION – Are you aware of any recycling programs for unused cell phones? (2015 Wave)

General awareness of recycling programs - by behaviour

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- Awareness is higher among those who have donated their phone to charity (62% aware) or recycled their phone (61% aware). Only 22 per cent of those who threw their phones in the garbage are aware of recycling programs

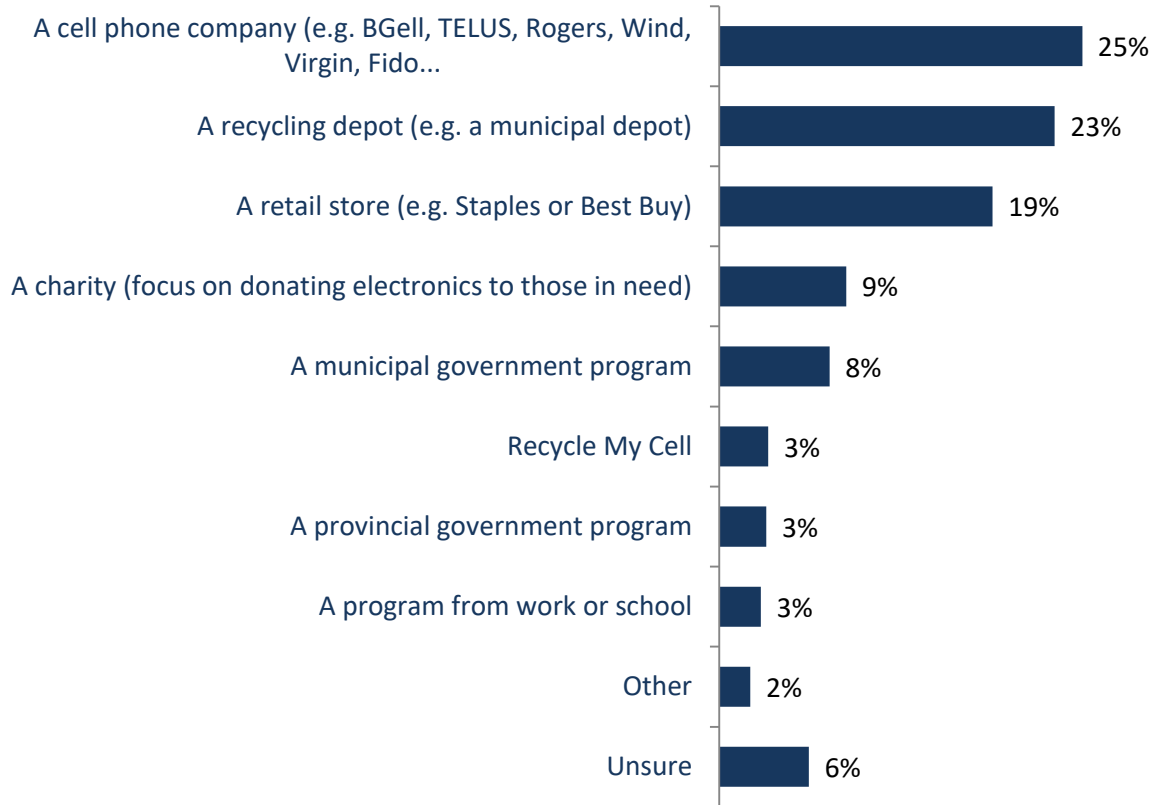


*Note: Charts may not add up to 100 due to rounding

QUESTION – Are you aware of any recycling programs for **old or** unused cell phones?

Unaided awareness of recycling programs in area

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=1812 (respondents who currently own a cell phone), accurate 2.3 percentage points plus or minus, 19 times out of 20. HEARD OF RECYCLING PROGRAMS ONLY.



- Top mentions among those who could name programs in their area include a cell phone company (25%), recycling depots (23%), a retail store (19%), and a charity (nine per cent).

*Based on multiple mentions

*Note: Charts may not add up to 100 due to rounding

QUESTION – [IF AWARE OF PROGRAMS ONLY] What cell phone recycling programs are you aware of in your area?
[Open-ended]

Unaided awareness of recycling programs in area - by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=1812 (respondents who currently own a cell phone), accurate 2.3 percentage points plus or minus, 19 times out of 20. HEARD OF RECYCLING PROGRAMS ONLY.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=1271 (respondents who currently own a cell phone), accurate 2.8 percentage points plus or minus, 19 times out of 20. HEARD OF RECYCLING PROGRAMS ONLY.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=1250 (respondents who currently own a cell phone), accurate 2.8 percentage points plus or minus, 19 times out of 20. HEARD OF RECYCLING PROGRAMS ONLY.

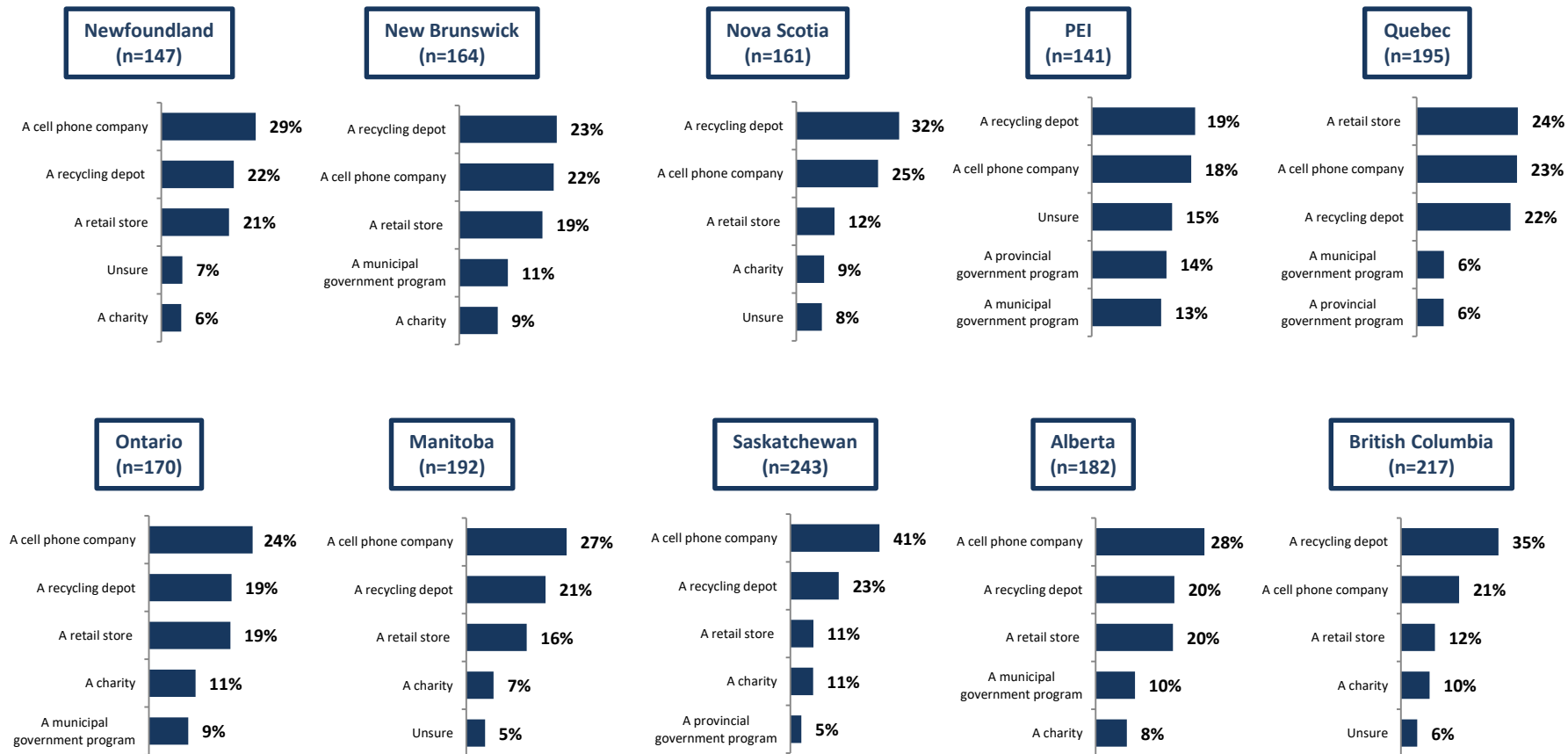
Mentions of cell phone recycling programs	Year		
	2017 (n=1812)*	2016 (n=1271)*	2015 (n=1250)*
A cell phone company (e.g. Bell, TELUS, Rogers, Wind, Virgin, Fido, Koodo, Sasktel, MTS, TBayTel, Videotron, etc.)	24.7%	21.0%	19.0%
Recycling depot (e.g. municipal depot)	22.9%	17.5%	13.6%
A retail store (e.g. Staples, Best Buy, etc)	18.6%	23.9%	23.3%
A charity (focus on donating electronics to those in need)	8.7%	8.4%	5.9%
A municipal government program	7.5%	11.8%	14.3%
Recycle My Cell	3.3%	4.5%	2.4%
A provincial government program	3.2%	5.8%	2.4%
A program from work or school	2.8%	7.3%	5.3%
Other	2.3%	0.6%	4.3%
Unsure	6.1%	6.1%	1.2%

*Based on multiple mentions

QUESTION – [IF AWARE OF PROGRAMS ONLY] What cell phone recycling programs are you aware of in your area? [Open-ended]

Unaided awareness of recycling programs in area - by province

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=1812 (respondents who currently own a cell phone), accurate 2.3 percentage points plus or minus, 19 times out of 20. HEARD OF RECYCLING PROGRAMS ONLY.



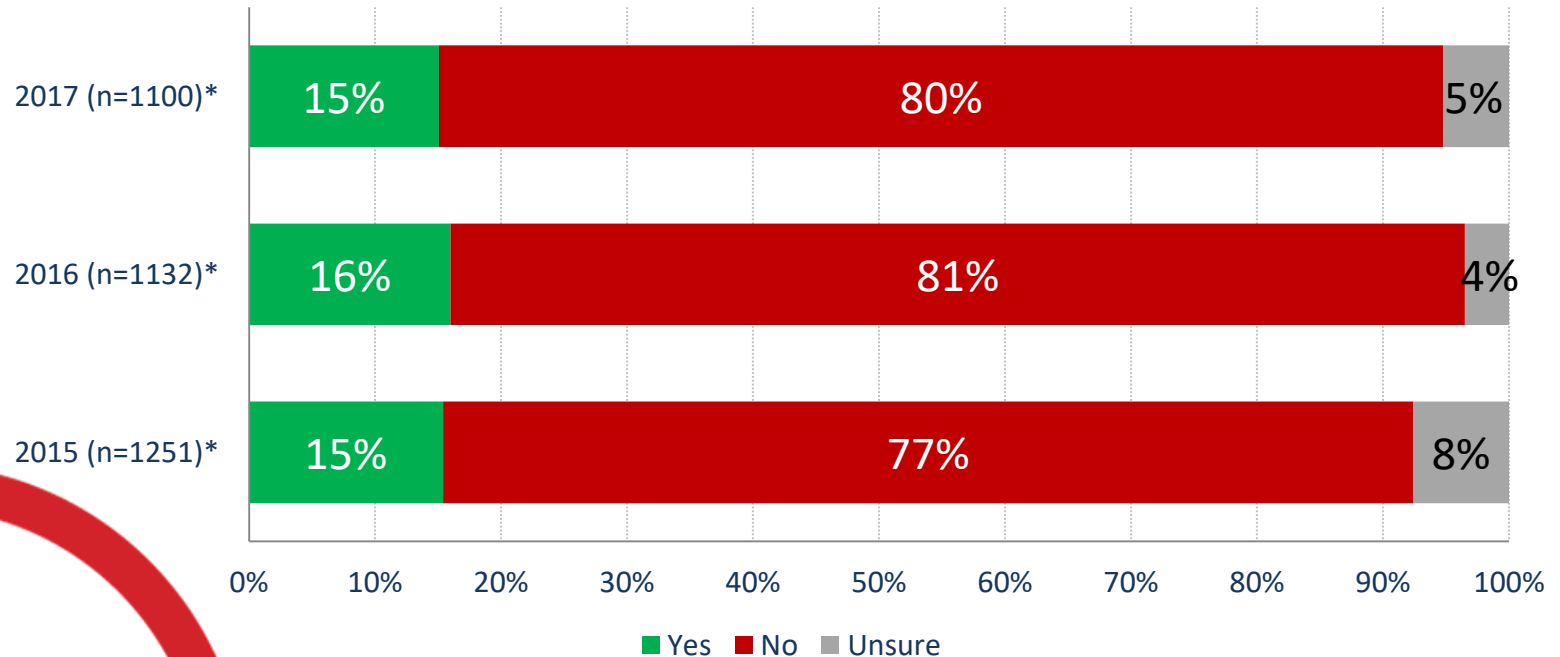
QUESTION – [IF AWARE OF PROGRAMS ONLY] What cell phone recycling programs are you aware of in your area? [Open-ended]

Awareness of Recycle My Cell program – by year

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=1100 (respondents who currently own a cell phone), accurate 3.0 percentage points plus or minus, 19 times out of 20. HEARD OF RECYCLING PROGRAMS ONLY.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 19th, 2016, n=1132 (respondents who currently own a cell phone), accurate 2.9 percentage points plus or minus, 19 times out of 20. HEARD OF RECYCLING PROGRAMS ONLY.

Source: Nanos Research, dual mode telephone (RDD dual frame) and online probability sample random survey, December 2nd to 15th, 2015, n=1251 (respondents who currently own a cell phone), accurate 2.8 percentage points plus or minus, 19 times out of 20. HEARD OF RECYCLING PROGRAMS ONLY.



*Note: Charts may not add up to 100 due to rounding

QUESTION – [IF AWARE OF PROGRAMS ONLY] Have you heard about the Recycle My Cell program?

Awareness of Recycle My Cell program – by province and demographic

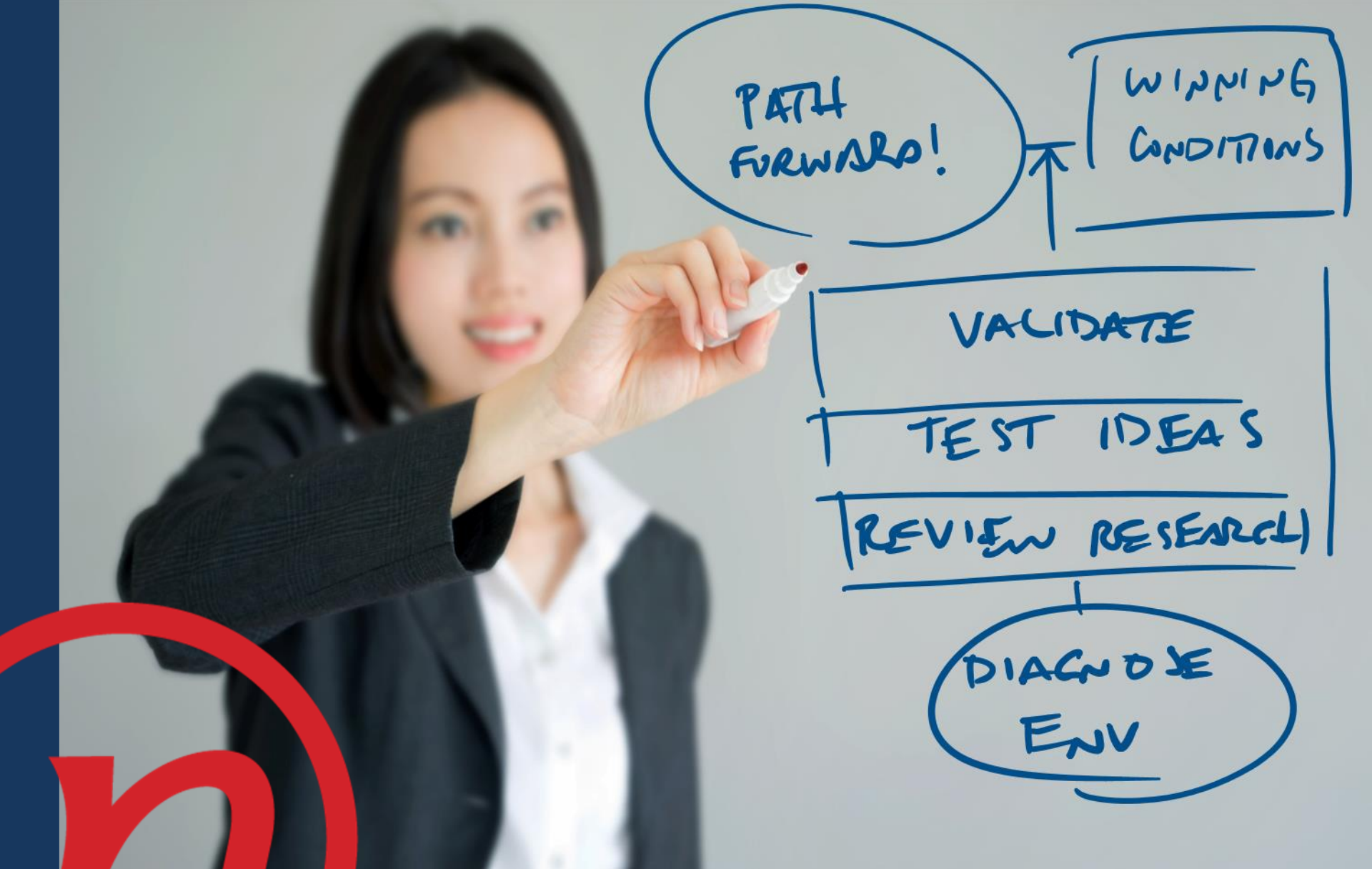
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 4th to 18th, 2017, n=3000 (respondents who currently own a cell phone), accurate 1.8 percentage points plus or minus, 19 times out of 20.

- National awareness of the Recycle My Cell program among those who have heard of recycling programs remains steady with 2016 and 2015 results at 15 per cent aware (16% aware in 2016 and 15% in 2015).
- Awareness of the Recycle My Cell program is highest among rural Canadians, females and in Quebec and Manitoba.

% AWARE	Total (n=3000)	Province									
		NFLD (n=300)	NB (n=300)	NS (n=300)	PEI (n=300)	QC (n=300)	ON (n=300)	MB (n=300)	SK (n=300)	AB (n=300)	BC (n=300)
Recycling programs in general (n=3000)	35.7%	27.0%	33.5%	32.2%	37.1%	35.0%	33.3%	38.4%	52.4%	36.6%	40.8%
Recycle My Cell (n=1100)	15.1%	12.5%	8.7%	15.0%	12.7%	20.8%	15.5%	20.6%	12.5%	7.1%	11.2%

% AWARE	Total (n=3000)	Region		Age			Gender	
		Urban (n=2249)	Rural (n=751)	18 to 34 (n=397)	35 to 54 (n=621)	55 plus (n=794)	Male (n=1014)	Female (n=798)
Recycling programs in general (n=3000)	35.7%	35.4%	37.0%	35.3%	38.4%	33.5%	36.4%	35.0%
Recycle My Cell (n=1100)	15.1%	13.7%	22.1%	15.9%	15.7%	13.8%	14.7%	15.4%

QUESTION – [IF AWARE OF RECYCLING PROGRAMS] Have you heard about the Recycle My Cell program?



Methodology

Methodology

Nanos administered a dual mode survey (telephone and online) with one half of the sample conducted by telephone (RDD dual frame land- and cell-line sample) using live agents and one half of the survey conducted with an online probability sample, where individuals were recruited by land- and cell-line sample but administered surveys online, 3000 Canadians (300 in each province), 18 years of age or older, between December 4th and 18th, 2017. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

The dual mode random telephone (land- and cell-line) sample with the parallel online sample provides for a very high level of confidence in the Nanos data compared to other research techniques because in effect it is a double verification of independent samples within each jurisdiction. Testing suggests that the two streams on major indicators are generally consistent within acceptable statistical norms. Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 3,000 Canadians is ± 1.8 percentage points, 19 times out of 20, while the margin of error for a random survey 300 residents of a Canadian province is ± 5.7 percentage points, 19 times out of 20.

The research was commissioned by the Canadian Wireless Telecommunications Association (CWTA).

Previous wave (2016):

Nanos administered a dual mode survey (telephone and online) with one half of the sample conducted by telephone (RDD dual frame land- and cell-line sample) using live agents and one half of the survey conducted with an online probability sample, where individuals were recruited by land- and cell-line sample but administered surveys online, 3000 Canadians (300 in each province), 18 years of age or older, between December 2nd to 19th, 2016. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

The dual mode random telephone (land- and cell-line) sample with the parallel online sample provides for a very high level of confidence in the Nanos data compared to other research techniques because in effect it is a double verification of independent samples within each jurisdiction. Testing suggests that the two streams on major indicators are generally consistent within acceptable statistical norms. Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 3,000 Canadians is ± 1.8 percentage points, 19 times out of 20, while the margin of error for a random survey 300 residents of a Canadian province is ± 5.7 percentage points, 19 times out of 20.

The research was commissioned by the Canadian Wireless Telecommunications Association (CWTA). 69

Methodology contd.

Previous wave (2015):

Nanos administered a dual mode survey (telephone and online) with one half of the sample conducted by telephone (RDD dual frame land- and cell-line sample) using live agents and one half of the survey conducted with an online probability sample, where individuals were recruited by land- and cell-line sample but conducted surveys online, of 3,000 Canadians (300 in each province), 18 years of age or older, between December 2nd to 15th, 2015. Due to the small size of the province, in the province of Prince Edward Island only the random live agent telephone survey was conducted. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

The dual mode random telephone (land- and cell-line) sample with the parallel online sample provides for a very high level of confidence in the Nanos data compared to other research techniques because in effect it is a double verification of independent samples within each jurisdiction (excluding PEI due to size). Testing suggests that the two streams on major indicators are generally consistent within acceptable statistical norms. Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 3,000 Canadians is ± 1.8 percentage points, 19 times out of 20, while the margin of error for a random survey 300 residents of a Canadian province is ± 5.7 percentage points, 19 times out of 20.

The research was commissioned by the Canadian Wireless Telecommunications Association (CWTA).



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	300	±5.7%
Prince Edward Island	300	±5.7%
Nova Scotia	300	±5.7%
New Brunswick	300	±5.7%
Quebec	300	±5.7%
Ontario	300	±5.7%
Manitoba	300	±5.7%
Saskatchewan	300	±5.7%
Alberta	300	±5.7%
British Columbia	300	±5.7%
Total	3,000	±1.8%

Demographic Profile of Respondents

Province	Unweighted base	Weighted base
Newfoundland and Labrador	300	47
New Brunswick	300	68
Nova Scotia	300	84
Prince Edward Island	300	13
Quebec	300	715
Ontario	300	1165
Manitoba	300	110
Saskatchewan	300	94
Alberta	300	331
British Columbia	300	373
Total	3000	3000

		Unweighted base size	Weighted base size	% of total (weighted)
Region	Urban	2249	2526	84.2%
	Rural	751	475	15.8%
Age	18-34	644	818	27.3%
	35-54	1017	1023	34.1%
	55+	1339	1160	38.7%
Gender	Male	1577	1456	48.5%
	Female	1423	1544	51.5%
Income	Less than \$45K	503	489	16.3%
	\$45K - <\$75K	841	785	26.1%
	\$75K +	1025	1094	36.5%
	Refuse	631	633	21.1%

Technical Note

Element	Description	Element	Description
Organization who commissioned the research	The Canadian Wireless Telecommunications Association (CWTA)	Weighting of Data	The results were weighted by age and gender using the latest Census information (2014) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Final Sample Size	3000 Randomly selected individuals. 300 per province.		
Margin of Error	National: ± 1.8 percentage points, 19 times out of 20. Provincial: ± 5.7 percentage points, 19 times out of 20.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media, a political party, or the telecommunications industry prior to administering the survey to ensure the integrity of the data.
Mode of Survey	Dual mode survey (telephone and online) with one half of the sample conducted by telephone (RDD dual frame land- and cell-line sample) using live agents and one half of the survey conducted with an online probability sample.		
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines could not participate.; individuals without a cell phone; new cell phone owners without a previous cell phone to dispose of.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Stratification	By age and gender using the latest Census information (2014) and the sample is geographically stratified to be representative of Canada.
Demographics (Other)	Age, gender, education, income	Estimated Response Rate	Nine per cent consistent with industry norms.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Number of Calls	Maximum of five call backs.	Question Content	All questions asked are contained in the report.
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Field Dates	December 4 th to 18 th , 2017.	Survey Company	Nanos Research
Language of Survey	The survey was conducted in both English and French.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanosresearch.com Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.

About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



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