

2011 Cell Phone Consumer Attitudes Study

Prepared for: CWTA

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Executive Summary

Executive Summary

RESEARCH OBJECTIVES

- Determine the type of mobile devices used and measure the use of data plans,
- Determine the main Internet-related activities of mobile phone users, including the incidence of downloading applications (apps) and the types of apps used,
- Assess awareness and interest in using 2-D barcodes among mobile phone users,
- Measure the interest of mobile phone users in evolving mobile phone concepts such as mobile payments, information storage and mobile advertising, and,
- Determine awareness, usage and motivations for making donations via text messaging.

RESEARCH METHODOLOGY

- Data collection was conducted with Canadian households through a combination of telephone surveys and an online panel between March 14th and the 27th, 2011:
 - A total of 2,003 mobile phone users completed the 12-minute phone survey (including 162 cell phone only households)
 - 404 cell phone only households (i.e. they do not have a home phone service) completed the 7-minute online survey.
- Within the larger telephone-based study, the survey was designed to specifically invite 14 to 17 year olds to participate ultimately resulting in a total of 85 from this age group completing the telephone survey.

Executive Summary

Mobile Phone Usage

- Nearly half (48%) of mobile phone users between 18 and 34 years old have a smartphone. This group is more likely to have a smartphone compared to those 14 to 17, or 45 years or older. In the 18 to 24 year old group, smartphone adoption is 55%.
- Overall, one-third (33%) of mobile phone users have a smartphone, while the remaining two-thirds report using a regular cell phone.
- Nearly 4 in 10 have a data plan with their mobile phone (37%).
- Of all respondents, 5% have a tablet, and 2% have a tablet connected to a cellular network.
- Nearly one third (29%) of mobile phone users access the Internet with their mobile phone.
- The most popular activities done using a mobile phone (based on a list of activities provided to respondents) are sending or receiving text messages (as noted by 68% of mobile phone users), and taking pictures (62%).
- Approximately 58% of smartphone users say they have downloaded apps to their cell phone. Those who have downloaded apps to their phones have downloaded 12 apps on average, of which roughly 25% were purchased (as opposed to downloaded for free).
- Three quarters of smartphone users (76%) use applications related to weather information, and over two thirds (69%) use apps that link them to social networks, Instant Messaging, or blogs. Approximately six in ten smartphone users say they use apps that link to travel, transit, mapping, or navigation information (61%), and over half use apps for YouTube (56%), or gaming apps including arcade, puzzles, action and casino games (52%).
- Roughly one in eight (13%) of mobile phone users were receptive to the idea of providing an app developer with either demographic information about themselves, or GPS information about their location, in order to receive an app for free.
- One fifth of mobile phone users (20%) have used short code texting in the past.

Executive Summary

Awareness and Usage of 2-D Barcodes

- Close to half of mobile phone users (45%) are aware of 2-D barcodes, and one tenth (10%) have used them. When asked what they had recently scanned, product barcodes (22%), barcodes in magazines, books and newspapers (14%), grocery items (14%) and BBM contact barcodes (14%) topped the list.
- Between 16% and 24% of mobile phone users show interest in the idea of using their phone to scan a 2-D barcode to:
 - instantly access a coupon (24%),
 - access additional information about a product or service (23%),
 - access reviews or ratings from other people who have used a product or service they are interested in (20%), and to
 - access longer versions or more related information of a magazine or newspaper article (16%).

Mobile Banking and Payments

- Almost one quarter (22%) of smartphone users do some of their banking or pay for products and services from their mobile phone.
- Concerns with security dominate as the primary barrier to the adoption of banking apps. Fully 31% of smartphone users who do not currently use banking apps have “general concerns with security”, while another 9% have specific concerns with privacy, 6% with identify theft and 6% with fraud.

Executive Summary

Interest in New Mobile Services and Concepts

- About one in ten mobile phone owners showed interest in receiving coupons from retailers (12%) in exchange for receiving ads on their device and 10% would be interested in receiving apps or exclusive content in exchange for receiving ads on their phone.
- Nearly one third of respondents (29%) show interest in the idea of having a service that would send information or coupons to their cell phone based on where they are at the time.
- Nearly 1 in 5 respondents (18%) shows interest in the idea of swiping their cell phone at a point of sale terminal or scanner.
- To further explore the appeal of the concept of a “mobile wallet”, respondents were asked how interested they might be in storing various types of digital information on their mobile phone rather than carry around the paper or card versions. Special membership cards (31%), transit passes (29%), loyalty point cards (27%) and gift cards (25%) were the types of cards respondents would be most interested in transferring to their phones.

Executive Summary

Mobile Giving

- Half of mobile phone users are aware of mobile giving, and 6% have donated this way.
- A newscast on TV or radio is what most donors recall prompting them to make a text donation (68%).
- Without a specific cause or appeal in mind, 12% of those who have never made a donation via texting say they would do so in the future if they were instructed on how to do it.
- Currently, those wanting to make a donation using text messaging can only choose codes for \$5 and \$10. When asked what is the highest one-time dollar amount they would like to be able to make assuming they were not limited by these amounts, 89% of previous and “interested” donors would give \$10 or more. In fact, 75% would give \$20 or more and 32% would give \$50 or more.
- In terms of a follow-up, previous and potential donors were most interested in a report on how the donations are being put to use (59%) and in directions or reminders to obtain a receipt (52%).

Research Objectives and Methodology

Research Objectives

The Canadian wireless industry continues to evolve, with handset manufacturers, service providers and content developers all innovating at an increasingly faster pace and mobile phone users continue to adopt and experiment with these innovations. To keep pace of consumer attitudes towards mobile services and innovations, the Canadian Wireless Telecommunications Association commissioned Quorus Consulting to undertake this nationwide study. The specific objectives of this research were to obtain baseline data on the following:

- Determine the type of mobile devices used and measure the use of data plans,
- Determine the main Internet-related activities of mobile phone users, including the incidence of downloading applications (apps) and the types of apps used,
- Assess awareness and interest in using 2-D barcodes among mobile phone users,
- Measure the interest of mobile phone users in evolving cell phone concepts such as mobile payments, information storage and mobile advertising, and,
- Determine awareness, usage and motivations for making donations via text messaging.

Research Methodology

- Data collection was conducted via a national independent survey, using a combination of CATI (Computer Assisted Telephone Interviewing) and CAWI (Computer Assisted Web Interviewing) technology, from dialing facilities in Ottawa, and an online panel based in Toronto.
 - A total of 2,003 mobile phone users completed the 12-minute phone survey (including 162 cell phone only households)
 - 404 cell phone only households (i.e. they do not have a home phone service) completed the 7-minute online survey.
- Data collection for this study was conducted from March 14th to 27th 2011.
- A random sampling procedure was used for the phone portion of the study, with established age and gender quotas to ensure sample representation of the Canadian adult population. The online part of the study used a panel of subscribed survey respondents, and surveys were completed nationally on an “as they fall” basis.
- All respondents were given the choice of conducting the survey in English or French.
- While most surveys target Canadians 18 years of age and older, the CWTA was interested in the opinions of younger Canadians. Within the larger telephone-based study, the survey was designed to specifically invite 14 to 17 year olds to participate ultimately resulting in a total of 85 from this age group completing the telephone survey.
- The data for the interviews completed by telephone are weighted to replicate actual population distributions by age and gender within Canada according to 2006 Census data. Results presented separately for cell phone only households have not been weighted since there is no reference for the actual profile of cell phone only households.

Margins of Error

- Because of the random probability sampling procedure used for the telephone survey, and the associated weighting procedures, margins of error have been calculated for the results derived from this data collection approach.
- 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.
- Because of the non-probability sampling of online panels, a valid margin of error has not been calculated. To provide guidance around potential differences between this group and respondents with a home phone service, a margin of error of 4.1% has been assumed.

Segment	Sample size (n)	Margin of error
Total cell phone users	2,003	+/-2.2%
Cell and home line HH	1,839	+/-2.3%
Cell phone only HH*	566	N/A
Regular cell phone	1,377	+/-2.6%
Smartphone	618	+/-3.9%
14-17 years old	85	+/-10.6%
18-24	136	+/-8.4%
25-34	273	+/-5.9%
35-44	380	+/-5.0%
45-54	434	+/-4.7%
55+	689	+/-3.7%

*The cell phone only segment consists of 162 surveys completed via the telephone portion and 404 surveys completed using an online panel.

How to Read the Results

Statistically Significant Differences

- Throughout the report, statistically significant differences among comparison groups are circled in the graphs or underlined in tables throughout the report.
- The groups that are being compared for statistical differences are listed below:

Label	Comparison Groups
Type of mobile phone	Regular mobile phone owners vs. Smartphone owners
Age group (1)	14-17 vs. 18-24 vs. 25-34 vs. 35-44 vs. 45-54 vs. 55+
Age group (2)	14-17 vs. 18-34 vs. 35-44 vs. 45-54 vs. 55+
Cell only households	Cell only households vs. Households with both cell phones and land lines
Gender	Men vs. Women
Region	BC vs. AB vs. MB/SK vs. ON vs. QC vs. Atlantic provinces

How to Read the Results (continued)

Top-3 Ratings

- A variety of questions in this survey asked respondents to rate their level of interest, likelihood to use, etc. using a 7-point scale, where 1 is the lowest score, and 7 is the highest score. For instance:

*Q16. Assuming the appropriate technology existed, how interested would you be in swiping or waving your cell phone at a point of sale terminal or scanner? By having your phone linked to your credit or debit card, the charges would be applied to the designated account. **IF NEEDED:** Please use a scale from 1 to 7, where 1 means “not at all interested”, and 7 means “extremely interested”.*

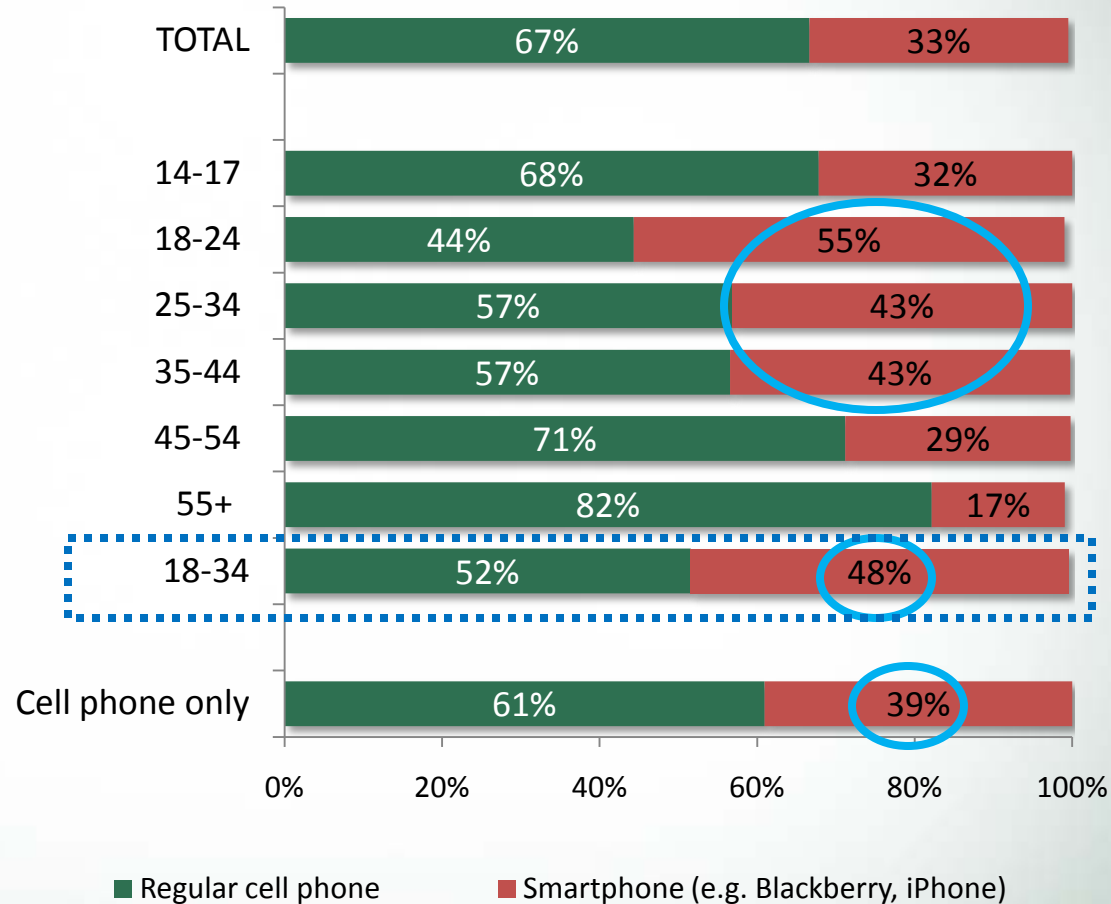
- Throughout this report, results for these types of questions have focused on the “Top-3 rating”, in other words, graphs and tables will show the proportion of respondents giving a score of 5, 6, or 7 on the 7-point scale.

Detailed Findings

Mobile Phone Usage

Smartphone vs. Regular Phone

- Nearly half (48%) of mobile phone users between 18 and 34 years old have a smartphone. This group is more likely to have a smartphone compared to those 14 to 17, or 45 years or older. In the 18 to 24 year old group, smartphone adoption is 55%.
- The adoption of smartphones is significantly higher among Canadians 18 to 44 years old.
- Overall, one-third (33%) of mobile phone users have a smartphone, while the remaining two-thirds report using a regular cell phone.
- Similarly, men and those who have their cell phone provided by their employer are more likely to have a smartphone.



Q4. Do you have a regular cellular phone or do you have a smartphone?
Base: All respondents; n=2,003

Smartphone vs. Regular Phone

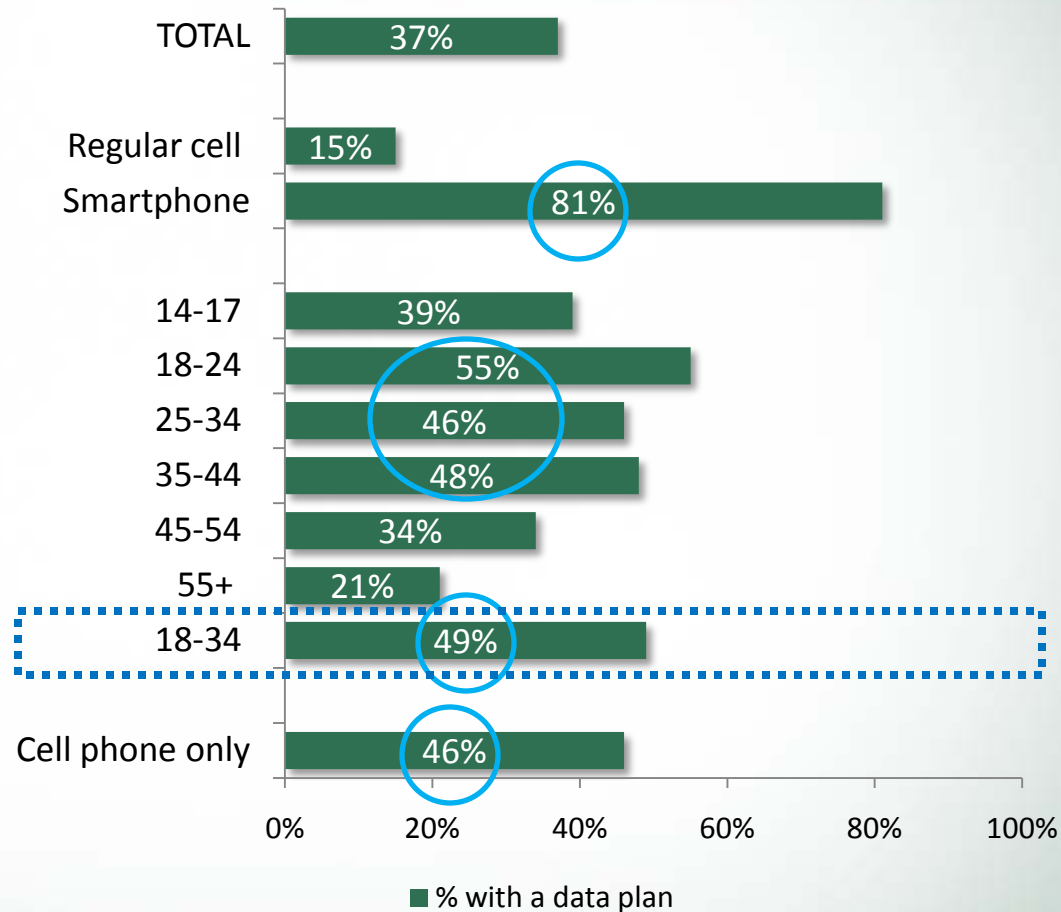
- By Gender and Region

	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Regular Phone	63%	<u>70%</u>	67%	60%	<u>81%</u>	62%	<u>73%</u>	65%
Smartphone	<u>37%</u>	29%	<u>33%</u>	<u>40%</u>	19%	<u>37%</u>	26%	<u>35%</u>

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Data Plan

- Nearly 4 in 10 mobile phone users have a data plan with their phone. While only 15% of regular phone owners say they subscribe to a data plan, fully 4 out of 5 smartphone owners say they have signed up to a data plan.
- Nearly half of mobile phone users between 18 and 34 have a data plan. This age group is more likely to have a data plan compared to those 45 years of age or older.
- Data plans are also relatively more common among:
 - Those between 18 and 44 years of age (49%)
 - Men, particularly those between 25 and 34 years old (54%)
 - Cell phone only households (46%)
 - Mobile phone users living in Alberta (52%)



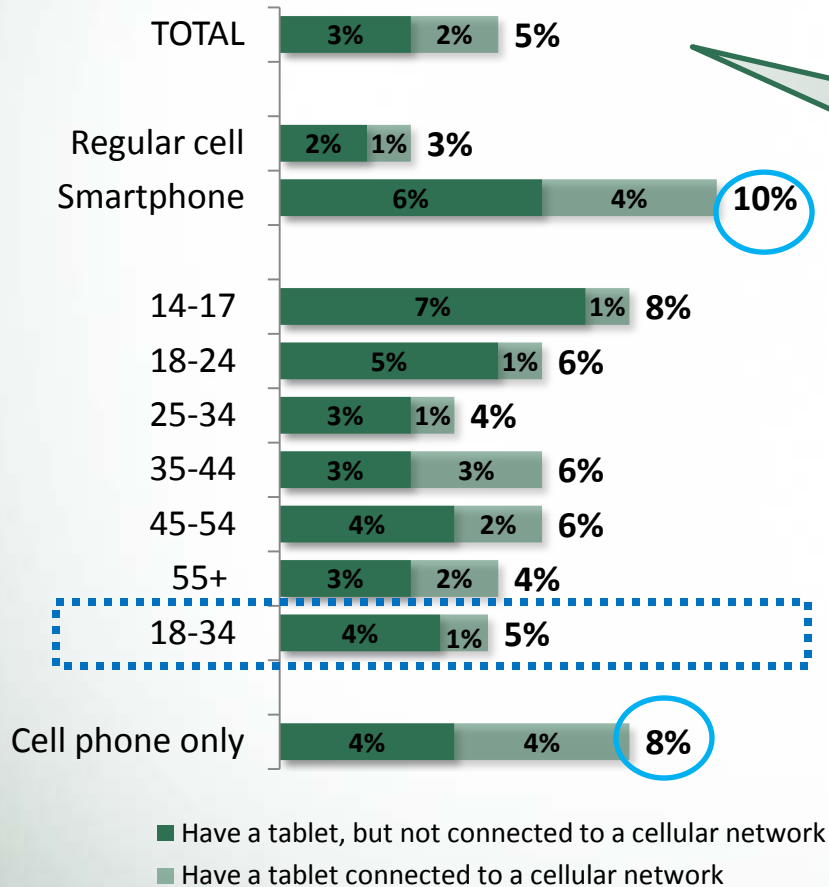
Data Plan

- By Gender and Region

	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Mobile phone users with data plan	<u>39%</u>	35%	<u>40%</u>	<u>52%</u>	31%	<u>37%</u>	30%	36%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Tablet Ownership



5% of mobile phone users in Canada also have a tablet, of which about a third have it connected to a cellular network

- Cell phone only households (8%) and smartphone users (10%) are leading the adoption of tablets in Canada.
- Although young Canadians are also strong adopters of tablets, actual connection to cellular networks is more common among older Canadians.
- Five percent of those between 18 and 34 years of age own a tablet, including 1% connected to a cellular network.

Tablet Ownership

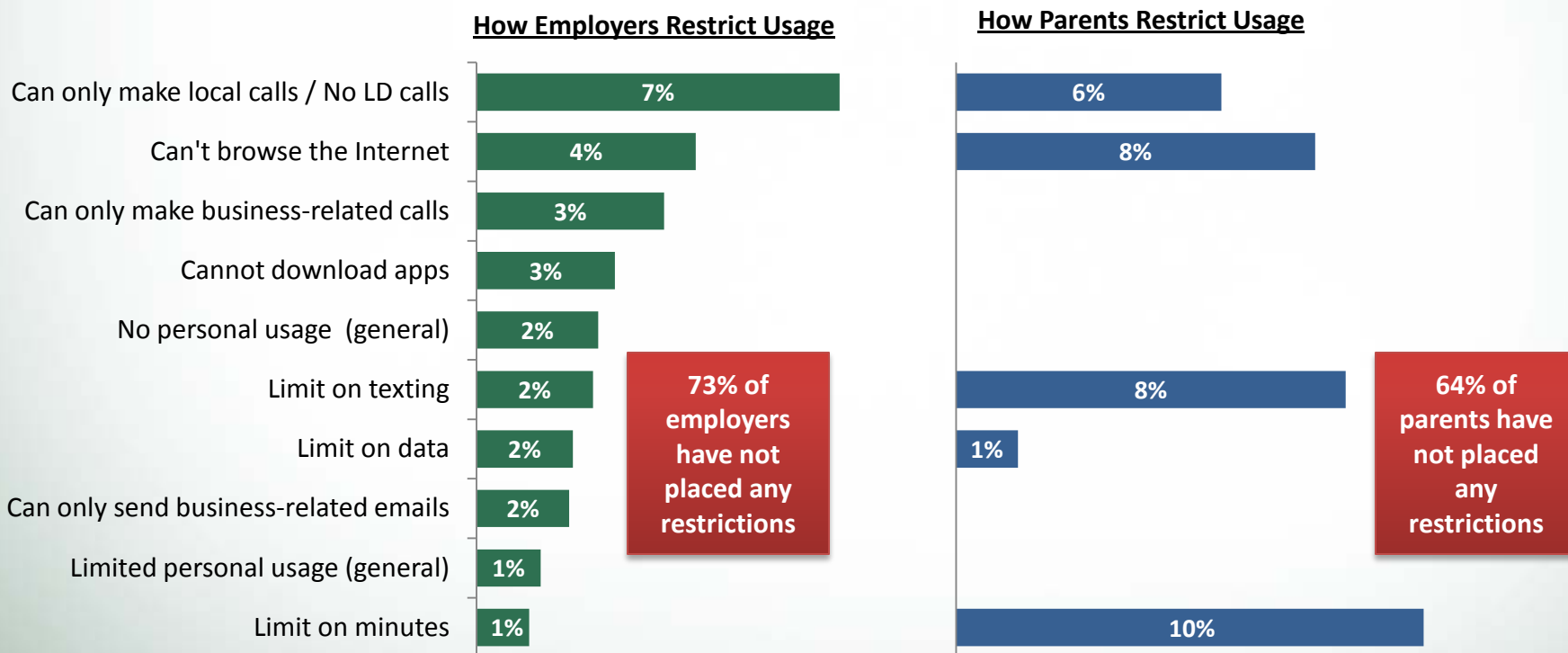
- By Gender and Region

	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Have a tablet:	6%	5%	5%	<u>7%</u>	4%	<u>6%</u>	5%	2%
Have a tablet connected to a cellular network	4%	4%	3%	3%	1%	<u>5%</u>	3%	1%
Have a tablet but <u>not</u> connected to a cellular network	2%	1%	2%	4%	3%	1%	1%	<1%

*Note: Statistical significant differences among groups are indicated with underlined numbers. The addition of the bottom-two rows may not add exactly to the top row due to rounding.

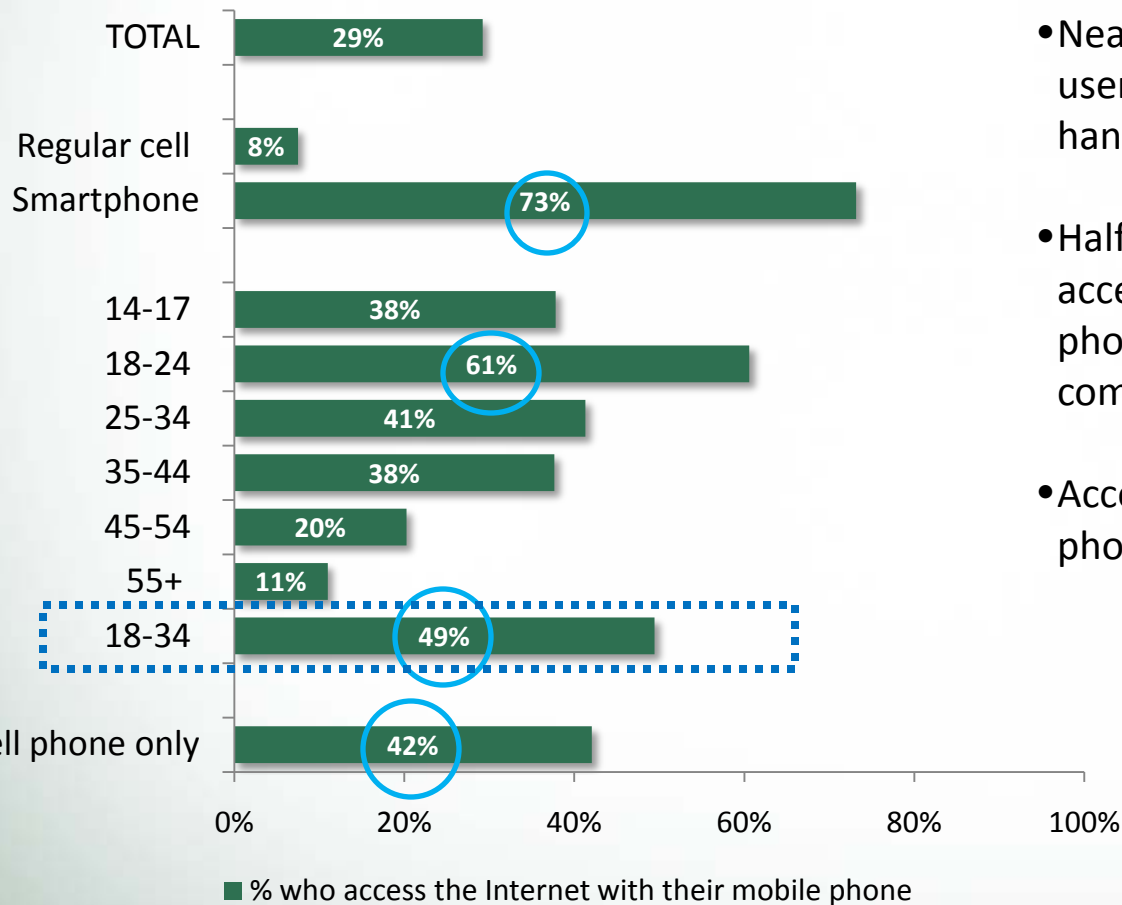
Usage Restrictions

- Seven in ten (73%) of those whose mobile phone is provided by their employer say they have no restrictions in the usage of their phone, while 64% of respondents 14 to 17 years old say their parents have not placed any restrictions on how they can use their cell phone. The most common restriction is related to long distance calling. Parents have also placed restrictions around Internet browsing, texting, and calling minutes.



Q3. What restrictions, if any, has your employer / your parents put on the usage of your cell phone?
 Base: Cell phone provided by employer; n=164 / Respondents under 18; n=85.

Use of Internet With Mobile Phones



- Nearly one third (29%) of mobile phone users access the Internet with their handset.
- Half of respondents between 18 and 34 access the Internet with their mobile phone (49%). This is significantly higher compared to older respondents.
- Access to the Internet through mobile phones is significantly higher among:
 - Smartphone owners (73%)
 - Mobile phone users between 18 and 24 years old (61%)
 - Cell phone only households (42%)
 - Men (33%)
 - Respondents in Alberta (43%)

Use of Internet With Mobile Phones

- By Gender and Region

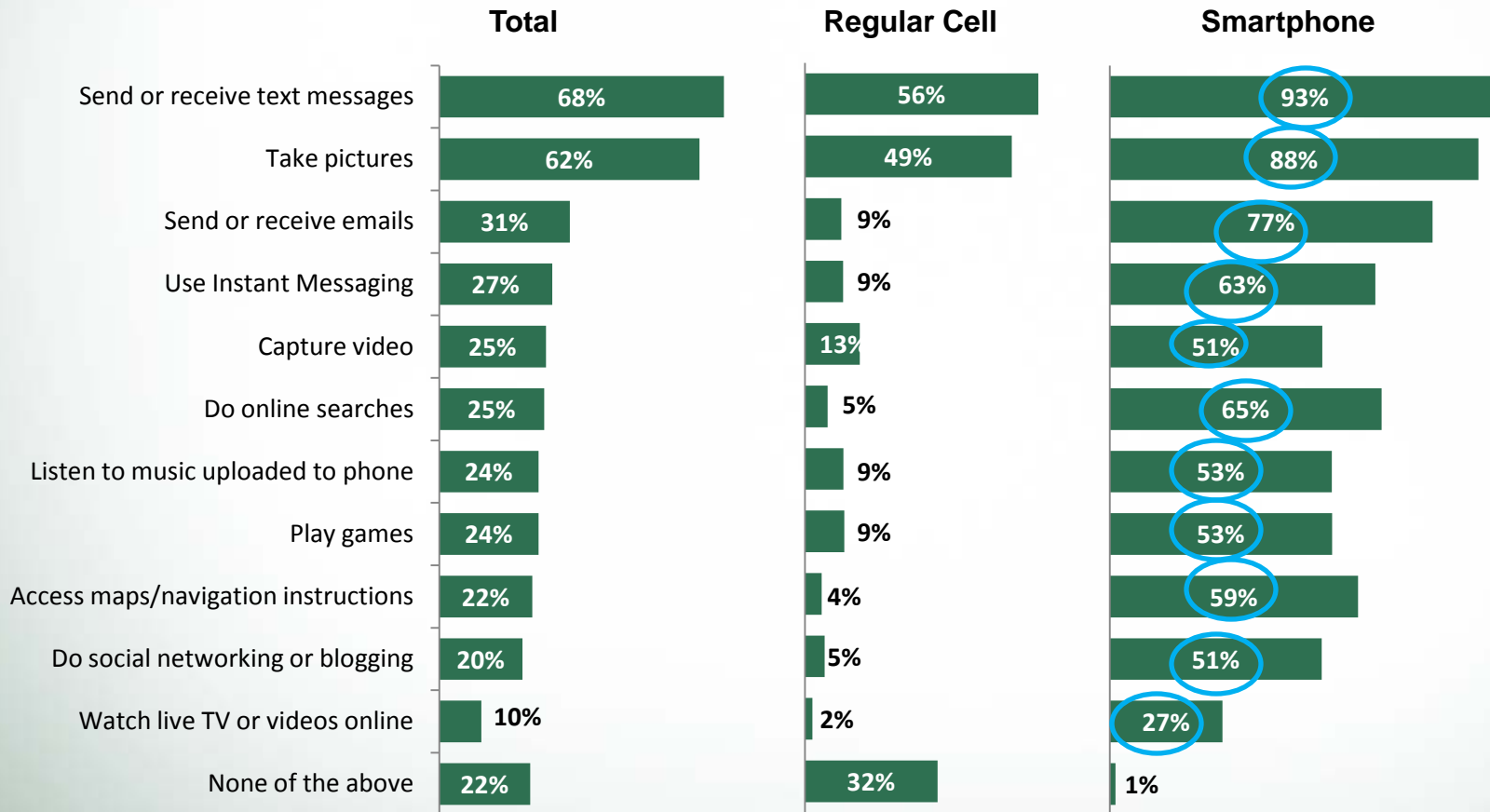
	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
% who access the Internet with their mobile phone	<u>33%</u>	26%	<u>30%</u>	<u>43%</u>	27%	<u>32%</u>	21%	22%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

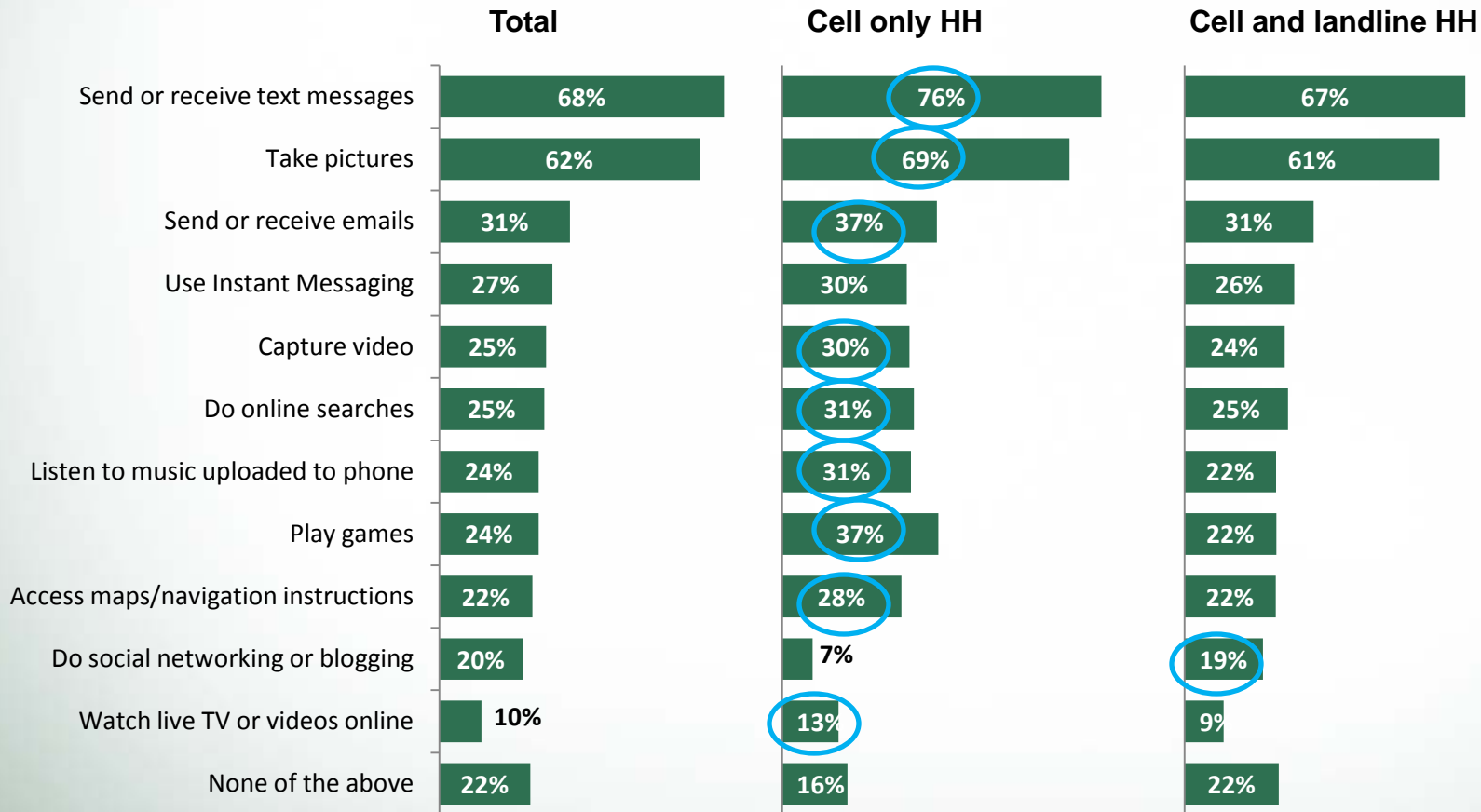
Mobile Phone Activities (prompted)

- All respondents were read a list of activities that could be undertaken on mobile phones. The most popular activities using a mobile phone are sending or receiving text messages (as noted by 68% of mobile phone users), and taking pictures (62%).
- As seen on the next page, smartphone users are more likely to make use of the many options their phones have to offer compared to regular phone owners. In fact, at least 50% of smartphone owners say they use their phone for nearly every activity presented in the survey.
- Not surprisingly, age is also a factor in the usage of the cell phone features.
 - The younger mobile phone users are, the more likely they are to send or receive text messages, take pictures, capture video, listen to music uploaded to their phone, and play games.
 - Those between 18 and 24 years old are more likely to use instant messaging, do online searches, and do social networking (women within this age range are more likely to do social networking than men – 63% vs. 44%).
 - Nearly half (46%) of cell phone users at least 55 years old do not use their cell phone for any of the activities listed in the survey.
- Some noteworthy gender-related differences include:
 - Women with smartphones are more likely to send and receive text messages than men (96% vs. 91%), and do social networking (55% vs. 47%).
 - Men with regular phones are more likely than women to listen to music uploaded to their phone (12% vs. 7%).

Mobile Phone Activities (prompted)



Mobile Phone Activities (prompted)



Mobile Phone Activities (prompted)

- By Age Group

	Age Groups						
	14-17	18-24	25-34	35-44	45-54	55+	18-34
Send or receive text messages	<u>95%</u>	<u>93%</u>	<u>88%</u>	<u>79%</u>	<u>66%</u>	38%	<u>90%</u>
Take pictures	<u>94%</u>	<u>91%</u>	<u>75%</u>	<u>71%</u>	<u>58%</u>	37%	<u>81%</u>
Send or receive emails	<u>30%</u>	<u>45%</u>	<u>43%</u>	<u>41%</u>	<u>29%</u>	17%	<u>44%</u>
Use Instant Messaging	<u>46%</u>	<u>50%</u>	<u>35%</u>	<u>35%</u>	<u>21%</u>	10%	<u>41%</u>
Capture video	<u>57%</u>	<u>55%</u>	<u>36%</u>	<u>31%</u>	<u>14%</u>	7%	<u>44%</u>
Do online searches	<u>30%</u>	<u>50%</u>	<u>35%</u>	<u>33%</u>	<u>17%</u>	10%	<u>41%</u>
Listen to music uploaded to phone	<u>55%</u>	<u>51%</u>	<u>37%</u>	<u>26%</u>	<u>12%</u>	7%	<u>43%</u>
Play games	<u>51%</u>	<u>43%</u>	<u>33%</u>	<u>31%</u>	<u>15%</u>	8%	<u>38%</u>
Access maps/navigation instructions	<u>20%</u>	<u>33%</u>	<u>35%</u>	<u>32%</u>	<u>17%</u>	10%	<u>34%</u>
Do social networking or blogging	<u>39%</u>	<u>53%</u>	<u>31%</u>	<u>24%</u>	<u>9%</u>	4%	<u>40%</u>
Watch live TV or videos online	<u>17%</u>	<u>19%</u>	<u>18%</u>	<u>13%</u>	<u>6%</u>	2%	<u>18%</u>
None of the above	-	1%	7%	<u>11%</u>	<u>23%</u>	<u>46%</u>	4%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Mobile Phone Activities (prompted)

- By Gender and Region

	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Send or receive text messages	67%	68%	<u>72%</u>	<u>77%</u>	<u>74%</u>	<u>70%</u>	59%	61%
Take pictures	62%	63%	<u>66%</u>	<u>67%</u>	<u>60%</u>	64%	57%	55%
Send or receive emails	<u>35%</u>	28%	<u>32%</u>	<u>42%</u>	<u>30%</u>	35%	23%	25%
Use Instant Messaging	29%	25%	<u>24%</u>	<u>37%</u>	29%	29%	21%	24%
Capture video	<u>28%</u>	23%	<u>31%</u>	<u>30%</u>	<u>21%</u>	28%	18%	23%
Do online searches	<u>28%</u>	22%	<u>27%</u>	<u>39%</u>	<u>23%</u>	28%	15%	21%
Listen to music uploaded to phone	27%	20%	<u>26%</u>	<u>32%</u>	<u>16%</u>	26%	19%	19%
Play games	24%	23%	<u>29%</u>	<u>31%</u>	<u>16%</u>	26%	17%	23%
Access maps/navigation instructions	<u>26%</u>	19%	<u>24%</u>	<u>32%</u>	<u>14%</u>	27%	13%	18%
Do social networking or blogging	20%	20%	<u>20%</u>	<u>30%</u>	<u>19%</u>	21%	14%	20%
Watch live TV or videos online	<u>12%</u>	8%	11%	<u>14%</u>	7%	11%	8%	9%
None of the above	22%	21%	18%	16%	22%	21%	<u>26%</u>	<u>28%</u>

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Mobile Internet Browser Usage (unprompted)



* Responses under 3% are not shown in the graph

- Respondents were also asked what “other” types of information or activities they access using their mobile phone’s Internet browser.
- Among the 29% of mobile users who actually use their browser on their handset, the most popular information included:
 - maps or navigation instructions (11%)
 - sports (10%)
 - bank accounts (9%)
 - news (8%)
 - travel or transit service (7%)
 - weather (6%), and,
 - restaurants (6%).
- Men are more likely than women to access sports information (15% vs. 5%), and information on products to compare them (7% vs. 1%).
- Cell phone only households are more likely to access news information compared to those who still have a land-line service (14% vs. 9%).

Mobile Internet Browser Usage (unprompted)

- By Age Group

	Age Groups						18-34
	14-17	18-24	25-34	35-44	45-54	55+	
Access maps/navigation instructions	2%	10%	<u>11%</u>	<u>14%</u>	<u>15%</u>	<u>13%</u>	<u>10%</u>
Access sports info	2%	<u>16%</u>	8%	<u>12%</u>	10%	5%	<u>12%</u>
Access bank accounts	-	<u>14%</u>	10%	9%	10%	4%	<u>12%</u>
Access to news / information	-	2%	<u>12%</u>	<u>11%</u>	<u>11%</u>	<u>11%</u>	7%
Access travel/ transit service info	2%	6%	5%	10%	5%	<u>12%</u>	6%
Weather	-	4%	6%	8%	9%	6%	5%
Access restaurant info	2%	7%	6%	7%	5%	5%	7%
Access financial news/ stock quotes	2%	-	5%	8%	6%	9%	2%
Google / other search functions	11%	6%	1%	2%	<u>7%</u>	4%	4%
Access information on products	4%	3%	6%	4%	3%	4%	4%
Access traffic reports	-	4%	5%	3%	5%	2%	5%
Access classifieds	-	2%	<u>7%</u>	4%	1%	2%	5%
Audio/Music	3%	3%	4%	3%	2%	3%	3%
YouTube / access to videos	8%	4%	2%	2%	3%	-	3%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Mobile Internet Browser Usage (unprompted)

- By Gender and Region

	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Access maps/navigation instructions	13%	10%	17%	17%	8%	8%	13%	8%
Access sports info	<u>15%</u>	5%	14%	<u>19%</u>	7%	8%	8%	-
Access bank accounts	9%	10%	11%	16%	5%	9%	8%	4%
Access to news / information	11%	6%	10%	8%	4%	10%	7%	3%
Access travel/ transit service info	9%	5%	12%	4%	9%	7%	5%	4%
Weather	7%	5%	3%	10%	6%	5%	7%	9%
Access restaurant info	7%	5%	10%	8%	2%	5%	8%	3%
Access financial news/ stock quotes	6%	4%	5%	5%	5%	5%	3%	3%
Google / other search functions	3%	6%	4%	6%	-	5%	5%	-
Access information on products	<u>7%</u>	1%	<u>13%</u>	4%	2%	3%	1%	3%
Access traffic reports	5%	2%	<u>10%</u>	4%	3%	3%	2%	-
Access classifieds	4%	3%	<u>11%</u>	1%	2%	3%	2%	2%
Audio/Music	4%	2%	-	3%	-	4%	5%	-
YouTube / access to videos	3%	2%	1%	1%	2%	4%	3%	-

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Apps Usage Among Smartphone Owners

- Approximately 58% of smartphone users say they have downloaded apps to their mobile phone. Those who have downloaded apps to their phones, have downloaded 12 apps on average, of which roughly one quarter were purchased (as opposed to downloaded for free).
- Smartphone owners that live in cell only households (71%), those between 14 and 44 years old (64%), and those in Alberta (76%) are also heavy downloaders of apps.
- Close to two thirds of smartphone owners between 18 and 34 years old have downloaded apps. On average they have downloaded 11 apps, and they have paid for 2 of them.

	Smartphone	14-17	18-24	25-34	35-44	45-54	55+	18-34	Cell only HH
Have downloaded apps	58%	<u>70%^A</u>	<u>65%</u>	<u>65%</u>	<u>60%</u>	45%	46%	<u>65%</u>	<u>71%</u>
# of apps downloaded	12	11 ^A	10	12	14	13	13	11	12
# of apps purchased	3	2 ^A	2	2	3	3	3	2	2

*Note: Statistical significant differences among groups are indicated with underlined numbers.

^A Caution – results are based on small sample sizes: 14-17 year old smartphone owners (n=29); those having downloaded apps (n=20)

Apps Usage Among Smartphone Owners

- By Gender and Region

	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Have downloaded apps	61%	55%	59%	<u>76%</u>	41% ^A	<u>60%</u>	49%	44%
# of apps downloaded	13	11	13	11	7 ^A	12	13	12 ^A
# of apps purchased	3	2	3	2	1 ^A	3	2	4 ^A

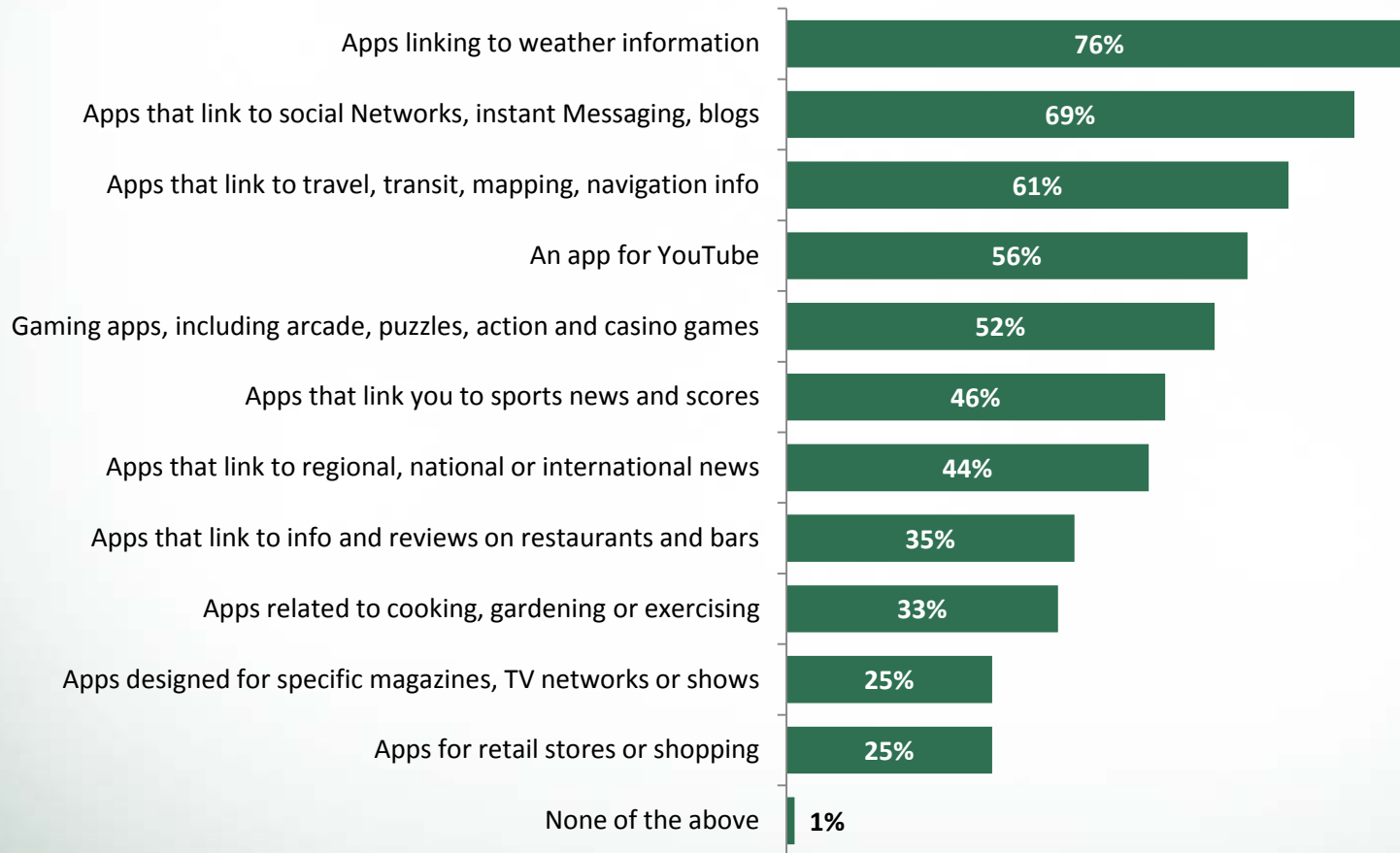
*Note: Statistical significant differences among groups are indicated with underlined numbers.

^A Caution – results are based on small sample sizes: MB/SK (n=29), those having downloaded apps in MB/SK (n=11), those having downloaded apps in Atlantic provinces (n=25).

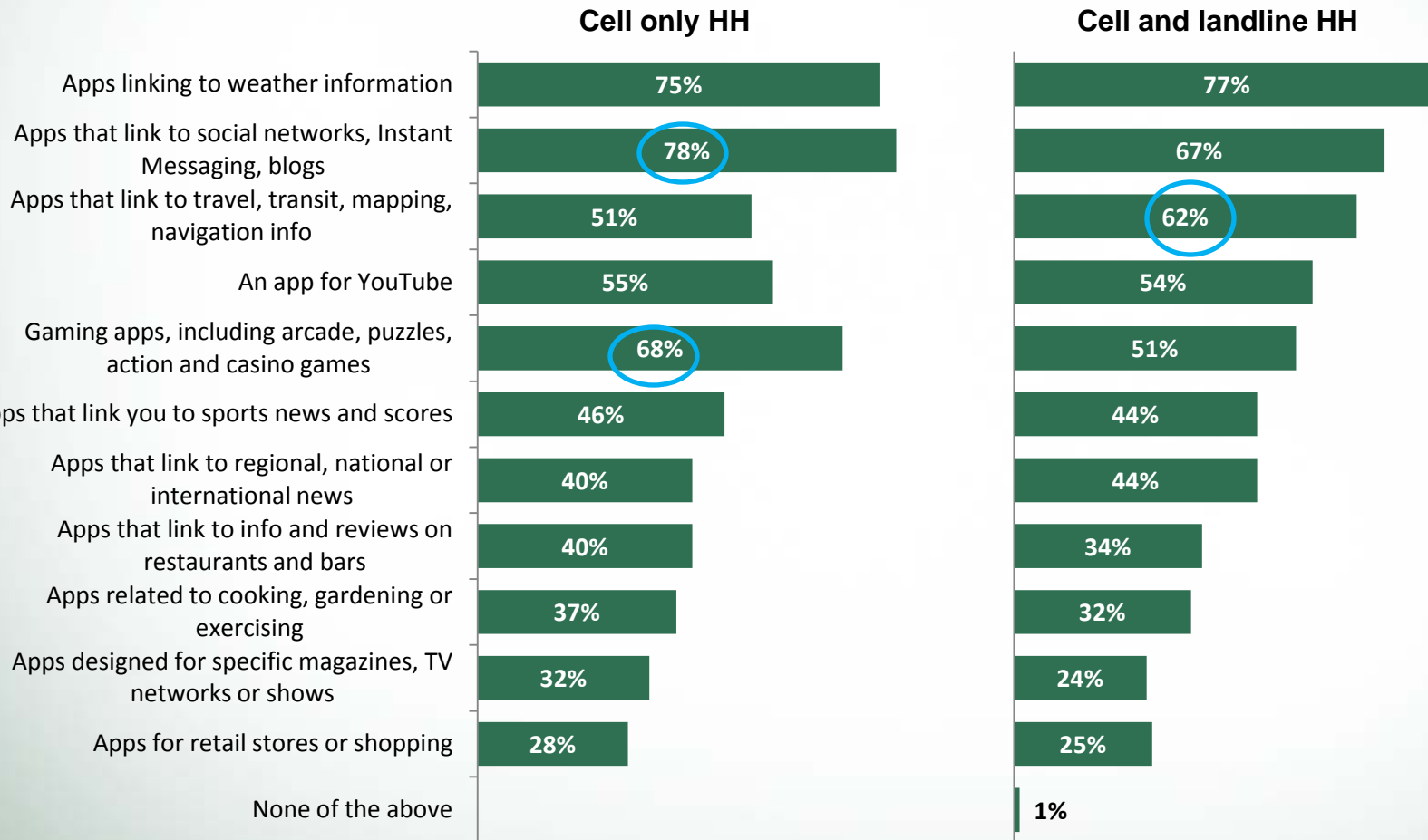
Most Common Types of Apps Used on Smartphones

- Smartphone users who indicated having downloaded apps were presented with a list of different types of apps and asked whether they use any of them on their phone.
- Three quarters of smartphone users (76%) use applications related to weather information, and over two thirds (69%) use apps that link them to social networks, Instant Messaging, or blogs.
 - The younger respondents are, the more likely they are to use apps that link to social networks, IM, or blogs.
- Approximately six in one smartphone users who have downloaded apps say they use apps that link to travel, transit, mapping, or navigation information (61%), and at least half use apps for YouTube (56%), or gaming apps including arcade, puzzles, action and casino games (52%).
 - The younger respondents are, the more likely they are to use YouTube and gaming apps.
- Roughly 30%-40% use apps related to sports news and scores (46%); regional, national or international news (44%); information and reviews on restaurants and bars (35%); and cooking, gardening or exercising (33%).
 - Men are more likely to use apps that link to sports news and scores (62%) and apps that link to regional, national, or international news (53%).
- Smartphone users who live in cell only households are more likely to use apps that link to social networks, Instant Messaging, or blogs (78%), and gaming apps (68%), compared to those who also have a land line.
- Smartphone users that are 18 to 34 years of age are more likely to use apps that link to social networks, Instant Messaging, or blogs (83%), compared to older respondents.

Most Common Types of Apps Used on Smartphones



Most Common Types of Apps Used on Smartphones



Most Common Types of Apps Used on Smartphones

- By Age Group

The top-5 types of apps for each age group are...

**14 to 17
years old^A**

- Apps that link to social networks, IM, and blogs (90%)
- App for YouTube (72%)
- Apps linking to weather information (64%)
- Apps that link to travel, transit, mapping and navigation info (60%)
- Gaming apps (59%)

**35 to 44
years old**

- Apps linking to weather information (76%)
- Apps that link to social networks, IM, and blogs (69%)
- Apps that link to travel, transit, mapping and navigation info (61%)
- App for YouTube (57%)
- Gaming apps (56%)

**18 to 24
years old**

- Apps that link to social networks, IM, and blogs (89%)
- Apps linking to weather information (73%)
- App for YouTube (69%)
- Gaming apps (63%)
- Apps that link you to sports news and scores (60%)

**45 to 54
years old**

- Apps linking to weather information (73%)
- Apps that link to travel, transit, mapping and navigation info (64%)
- Apps that link to regional, national or intern'l news (57%)
- Apps that link you to sports news and scores (46%)
- Apps that link to info and reviews on restaurants and bars (45%)

**25 to 34
years old**

- Apps linking you to weather information (81%)
- Apps that link to social networks, IM, and blogs (78%)
- Apps that link to travel, transit, mapping and navigation info (65%)
- App for YouTube (59%)
- Gaming apps (57%)

**55 years
and older**

- Apps linking to weather information (85%)
- Apps that link to travel, transit, mapping and navigation info (68%)
- Apps that link to regional, national or intern'l news (47%)
- Apps that link to social networks, IM, and blogs (36%)
- App for cooking, gardening or exercising (34%)

^A Caution – results are based on small sample sizes: 14-17 year old smartphone owners who have downloaded apps (n=20).

Most Common Types of Apps Used on Smartphones

- By Age Group

	Age Groups						18-34
	14-17 ^A	18-24	25-34	35-44	45-54	55+	
Apps linking you to weather information	64%	73%	81%	76%	73%	85%	77%
Apps that link to social networks, Instant Messaging, blogs	90%	<u>89%</u>	<u>78%</u>	<u>69%</u>	41%	36%	<u>83%</u>
Apps that link to travel, transit, mapping, navigation info	60%	52%	65%	61%	64%	68%	59%
An app for YouTube	72%	<u>69%</u>	<u>59%</u>	<u>57%</u>	36%	33%	<u>64%</u>
Gaming apps, incl arcade, puzzles, action and casino games	59%	<u>63%</u>	<u>57%</u>	<u>56%</u>	34%	31%	<u>60%</u>
Apps that link you to sports news and scores	52%	<u>60%</u>	45%	41%	46%	33%	<u>52%</u>
Apps that link to regional, national or international news	36%	34%	48%	44%	<u>57%</u>	47%	41%
Apps that link to info and reviews on restaurants and bars	16%	34%	40%	35%	45%	28%	<u>37%</u>
Apps related to cooking, gardening or exercising	25%	31%	<u>45%</u>	27%	30%	34%	38%
Apps designed for specific magazines, TV networks or shows	42%	26%	<u>30%</u>	24%	22%	14%	<u>28%</u>
Apps for retail stores or shopping	32%	32%	22%	24%	22%	22%	27%
None of the above	-	-	2%	-	-	5%	1%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

^A Caution – results are based on small sample sizes: 14-17 year old smartphone owners who have downloaded apps (n=20).

Most Common Types of Apps Used on Smartphones

- By Gender and Region

	Gender		Region					
	Male	Female	BC	AB	MB/SK ^A	ON	QC	ATL ^A
Apps linking you to weather information	77%	75%	73%	78%	69%	76%	80%	79%
Apps that link to social networks, Instant Messaging, blogs	66%	72%	58%	76%	85%	70%	64%	72%
Apps that link to travel, transit, mapping, navigation info	63%	60%	59%	55%	81%	63%	62%	65%
An app for YouTube	59%	51%	51%	51%	44%	59%	53%	69%
Gaming apps, incl. arcade, puzzles, action and casino games	54%	49%	53%	45%	29%	50%	62%	64%
Apps that link you to sports news and scores	<u>62%</u>	25%	49%	36%	42%	52%	39%	42%
Apps that link to regional, national or international news	<u>53%</u>	32%	42%	34%	62%	47%	48%	43%
Apps that link to info and reviews on restaurants and bars	35%	34%	39%	21%	46%	39%	38%	18%
Apps related to cooking, gardening or exercising	29%	38%	30%	25%	30%	38%	27%	45%
Apps designed for specific magazines, TV networks or shows	28%	22%	23%	27%	7%	25%	31%	26%
Apps for retail stores or shopping	25%	25%	24%	24%	18%	24%	28%	38%
None of the above	1%	1%	4%	1%	5%	1%	-	-

*Note: Statistical significant differences among groups are indicated with underlined numbers.

^A Caution – results are based on small sample sizes: Smartphone owners who have downloaded apps in MB/SK (n=11), in Atlantic provinces (n=25).

Providing Information for a Free App

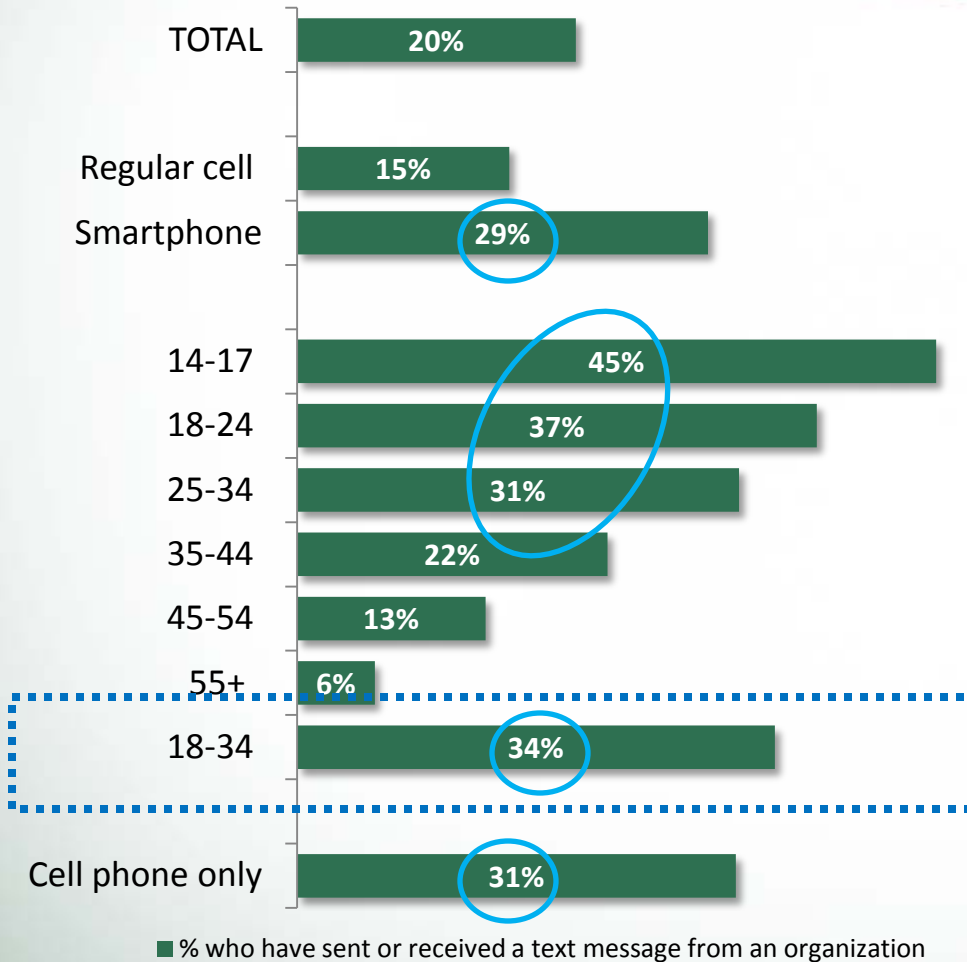
- The appeal of providing app developers personal information in exchange for free apps was measured among mobile phone users using a scale from 1 to 7 where 7 meant extremely interested, and 1 meant not interested at all.
- One in eight (13%) mobile phone users were receptive to the idea of providing an app developer either demographic information about themselves, or GPS information about their location, in order to receive an app for free.
- Those expressing relatively more interest in these ideas are smartphone owners, cell only households, and men. Interest in these new concepts decreases with age.

% of respondents giving a 5,6,or 7 rating	Total	Regular Cell	Smartphone	14-17	18-24	25-34	35-44	45-54	55+	18-34	Cell only HH
Would give demographic info for free apps	13%	7%	<u>23%</u>	<u>23%</u>	<u>24%</u>	<u>18%</u>	<u>14%</u>	<u>10%</u>	5%	<u>21%</u>	<u>27%</u>
Would give GPS info for free apps	13%	9%	<u>22%</u>	<u>19%</u>	<u>21%</u>	<u>16%</u>	<u>14%</u>	<u>13%</u>	8%	<u>18%</u>	<u>28%</u>

% of respondents giving a 5,6,or 7 rating	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Would give demographic info for free apps	<u>15%</u>	10%	13%	<u>17%</u>	12%	14%	10%	8%
Would give GPS info for free apps	<u>15%</u>	12%	<u>13%</u>	<u>16%</u>	5%	<u>13%</u>	<u>14%</u>	<u>12%</u>

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Short Code Texting



- One in five mobile phone users (20%) have used short code texting in the past.
- One third of mobile phone users between 18 and 34 have used short code texting in the past.
- Mobile users more likely to have used short code texting in the past are:
 - Smartphone owners (29%)
 - Cell phone only households (31%)
 - Those between 14 and 34 years old (36%)
 - Those living in Alberta (28%)

Short Code Texting

- By Gender and Region

	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Have used short code texting	21%	19%	18%	<u>28%</u>	25%	19%	19%	16%

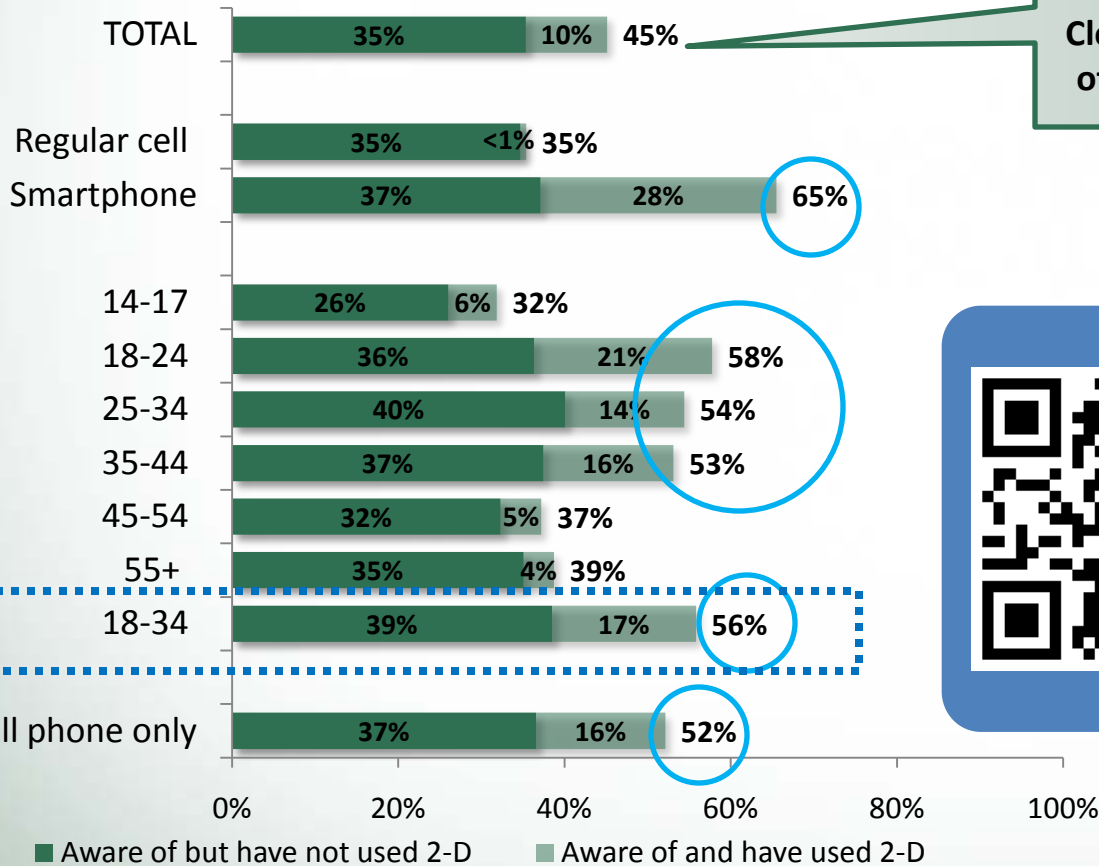
*Note: Statistical significant differences among groups are indicated with underlined numbers.

Awareness and Usage of 2-D Barcodes

Awareness and Usage of 2-D Barcodes

- Nearly half of mobile phone users (45%) are aware of 2-D barcodes. Respondents more likely to be aware of 2-D barcodes include:
 - Smartphone users (65%)
 - Cell only households (52%)
 - 18 to 44 year olds (61%)
 - Men (49%)
 - Albertans (56%)
- Despite a high level of awareness, only 10% of all mobile users have actually scanned a 2-D barcode. Smartphone users (28%), mobile users between 18 and 44 years of age (17%), cell only households (16%), and men (13%) are relatively stronger adopters of this activity.
- Over half of respondents between 18 and 34 years of age (56%) are aware of 2-D barcodes, and 17% have used them.
- When asked what they had recently scanned, product barcodes (22%), barcodes in magazines, books and newspapers (14%), grocery items (14%) and BBM contact barcodes (14%) topped the list.

Awareness and Usage of 2-D Barcodes



Close to half of mobile phone users are aware of 2-D barcodes, and 1 in 10 have used them

What was the last thing scanned?



- Product barcodes (22%)
- Barcode in a magazine, book or newspaper (14%)
- BBM barcodes (14%)
- Grocery item (14%)
- Airline ticket (5%)
- Another phone (5%)
- Coupons and promotions (5%)

Awareness and Usage of 2-D Barcodes

- By Gender and Region

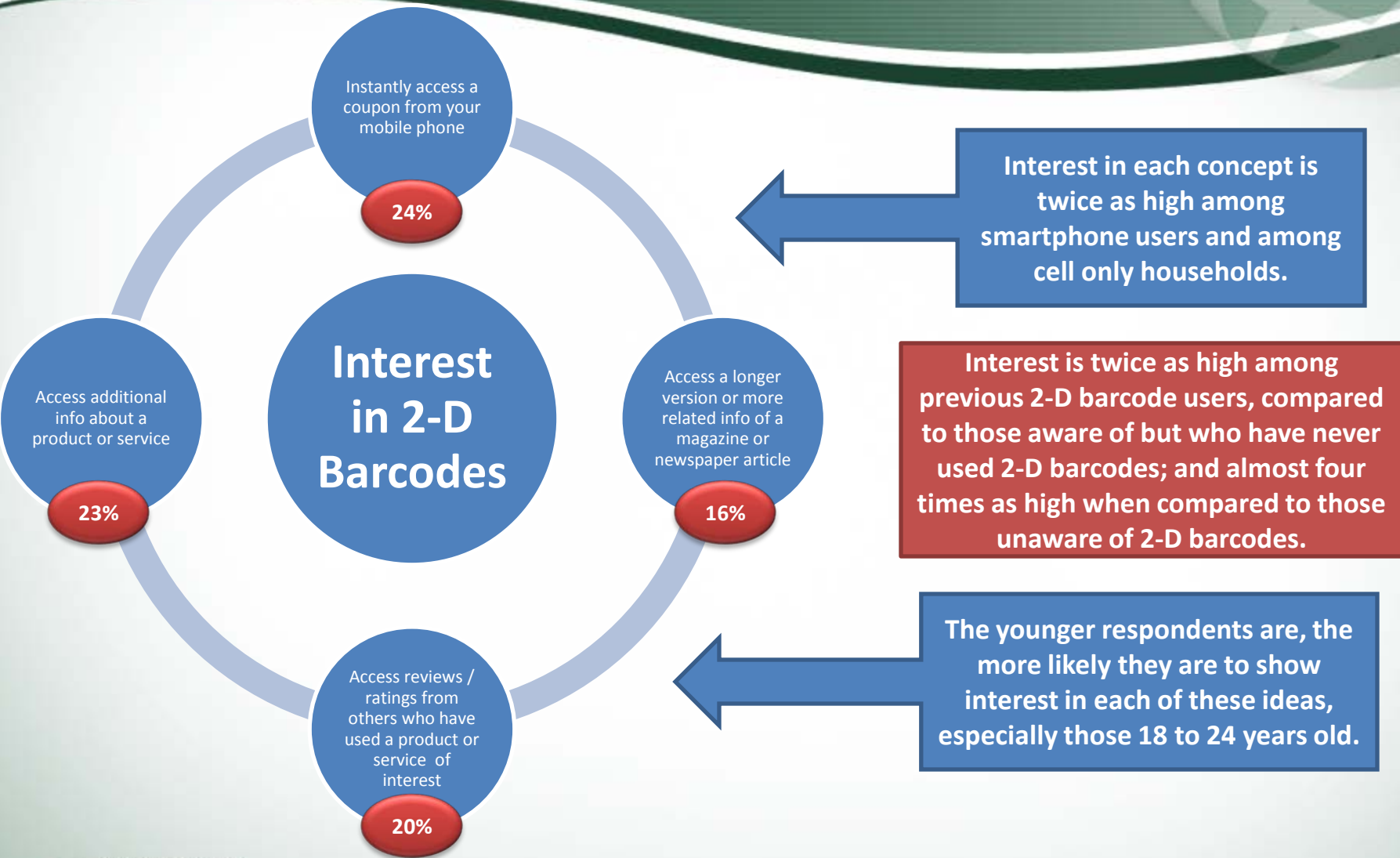
	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Aware of 2-D barcodes:	<u>49%</u>	41%	<u>50%</u>	<u>56%</u>	42%	<u>49%</u>	36%	34%
Aware and have used 2-D barcodes	<u>13%</u>	7%	<u>12%</u>	<u>12%</u>	9%	<u>11%</u>	6%	7%
Aware but have not used 2-D barcodes	36%	35%	38%	44%	33%	38%	30%	27%

*Note: Statistical significant differences among groups are indicated with underlined numbers. The addition of the bottom-two rows may not add exactly to the top row due to rounding.

Interest in Using Mobile Phone to Scan a 2-D Barcode

- Approximately one quarter of respondents showed interest in the idea of using their mobile phone to scan a 2-D barcode to instantly access a coupon (24%), or to access additional information about a product or service (23%). A slightly lower proportion is interested in scanning a 2-D barcode to access reviews or ratings from other people who have used a product or service they are interested in (20%), or to access longer versions or more related information of a magazine or newspaper article (16%).
- Those who have used this feature see significant benefit in it and are likely to continue using it. Analysis on each of these four concepts based on prior experience and awareness of 2-D barcodes reveals interest is twice as high among previous 2-D barcode users compared to those aware of but who have never used 2-D barcodes. It is almost four times higher among “users” when compared to those previously unaware of 2-D barcodes.

Interest in Using Mobile Phone to Scan a 2-D Barcode



Interest in Using Mobile Phone to Scan a 2-D Barcode

- By Age Group

% of respondents giving a 5,6,or 7 rating	Age Groups						
	14-17	18-24	25-34	35-44	45-54	55+	18-34
Instantly access a coupon from your mobile phone	<u>36%</u>	<u>42%</u>	<u>39%</u>	<u>28%</u>	<u>18%</u>	9%	<u>40%</u>
Access from your mobile phone additional information about a product or service	<u>34%</u>	<u>43%</u>	<u>34%</u>	<u>26%</u>	<u>18%</u>	8%	<u>38%</u>
Access from your mobile phone reviews or ratings from other people who have used a product or service you are interested in	<u>38%</u>	<u>36%</u>	<u>33%</u>	<u>21%</u>	<u>14%</u>	7%	<u>34%</u>
Access from your mobile phone a longer version or more related information of a magazine or newspaper article	<u>25%</u>	<u>30%</u>	<u>28%</u>	<u>20%</u>	<u>12%</u>	5%	<u>28%</u>

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Interest in Using Mobile Phone to Scan a 2-D Barcode

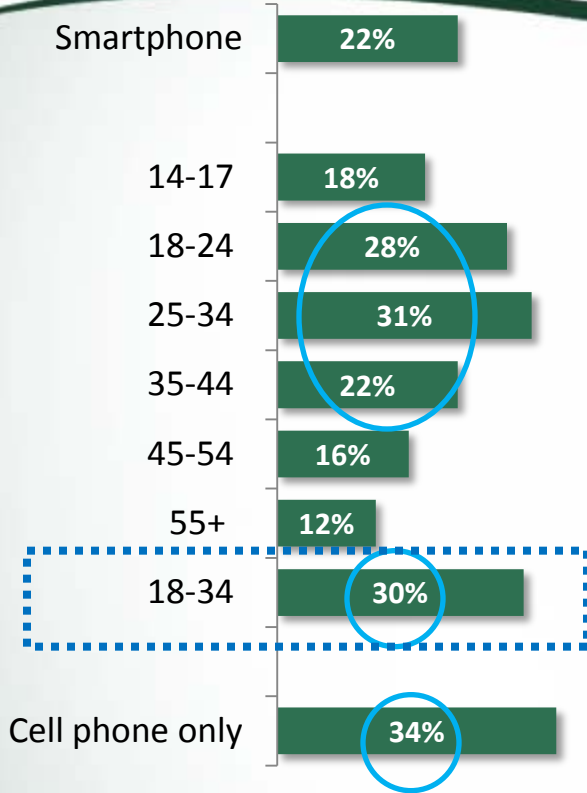
- By Gender and Region

% of respondents giving a 5,6,or 7 rating	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Instantly access a coupon from your mobile phone	24%	23%	24%	20%	19%	<u>27%</u>	22%	21%
Access from your mobile phone additional information about a product or service	<u>26%</u>	19%	<u>23%</u>	<u>27%</u>	14%	<u>25%</u>	19%	20%
Access from your mobile phone reviews or ratings from other people who have used a product or service you are interested in	<u>23%</u>	16%	20%	<u>22%</u>	13%	<u>22%</u>	19%	15%
Access from your mobile phone a longer version or more related information of a magazine or newspaper article	<u>18%</u>	14%	<u>16%</u>	<u>20%</u>	10%	<u>18%</u>	<u>15%</u>	7%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Mobile Banking and Payments

Mobile Phone Banking and Payment Apps



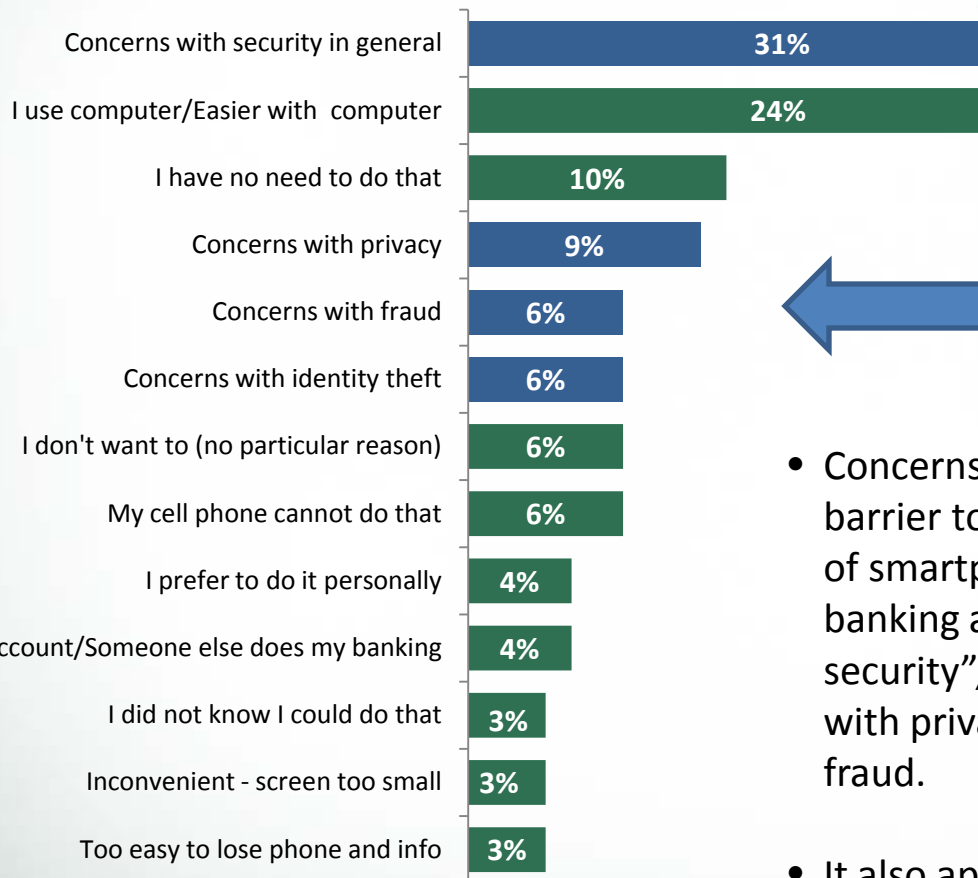
- Over one fifth (22%) of smartphone users do some of their banking or pay for products and services from their phone. This is significantly higher among:
 - Smartphone owners between 18 and 44 years old (27%)
 - Cell phone only households (34%)
- Nearly one third (30%) of smartphone owners between 18 and 34 years of age do some of their banking or pay for products and services from their phone.

■ % who use banking and payment apps

	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
% who use banking and payment apps	25%	19%	22%	23%	18%	25%	21%	9%

^A Caution – results are based on small sample sizes: 14-17 year old smartphone owners (n=29), smartphone owners in MB/SK (n=29).

Banking and Payment Apps Adoption Barriers



As the bars in blue show, security is by far the more pervasive concern among those not using banking and payment apps.

Women are more than twice as likely to be concerned with privacy, fraud and identity theft compared to men.

- Concerns with security dominate as the primary barrier to the adoption of banking apps. Fully 31% of smartphone users who do not currently use banking apps have “general concerns with security”, while another 9% have specific concerns with privacy, 6% with identify theft and 6% with fraud.
- It also appears that many still prefer to use their computer for these types of transactions (24%).

* Responses under 3% in the Total column are not shown in the graph

Banking and Payment Apps Adoption Barriers

- By Age Group

	Age Groups						18-34
	14-17 ^A	18-24	25-34	35-44	45-54	55+	
Concerns with security in general	15%	28%	33%	35%	35%	29%	31%
I use my computer/It is easier with my computer	7%	23%	25%	25%	20%	<u>36%</u>	24%
I have no need to do that	19%	12%	11%	5%	9%	10%	11%
Concerns with privacy	-	6%	8%	10%	6%	<u>17%</u>	7%
I don't want to (no particular reason)	-	1%	8%	6%	<u>10%</u>	7%	5%
My cell phone cannot do that	5%	<u>12%</u>	8%	3%	2%	8%	<u>10%</u>
Concerns with identity theft	-	7%	5%	6%	6%	8%	6%
Concerns with fraud	-	5%	5%	7%	7%	6%	5%
No bank account/Someone else does my banking	39%	5%	4%	1%	-	-	5%
I prefer to do it personally	-	10%	-	<u>7%</u>	2%	-	5%
Inconvenient (screen is too small)	-	1%	1%	5%	6%	1%	1%
Too easy to lose phone and information	3%	3%	4%	1%	7%	-	4%
I did not know I could do that	-	3%	3%	3%	2%	3%	3%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

^A Caution – results are based on a small sample size: 14-17 year old smartphone owners who do not use their cell phone to manage some of their banking or to pay for products and services (n=25).

Banking and Payment Apps Adoption Barriers

- By Gender and Region

	Gender		Region					
	Male	Female	BC	AB	MB/SK ^A	ON	QC	ATL
Concerns with security in general	31%	31%	32%	30%	34%	34%	30%	21%
I use my computer/It is easier with my computer	23%	26%	20%	<u>30%</u>	7%	21%	31%	31%
I have no need to do that	11%	9%	3%	9%	3%	<u>11%</u>	<u>14%</u>	5%
Concerns with privacy	5%	<u>13%</u>	11%	10%	9%	9%	11%	3%
I don't want to (no particular reason)	7%	5%	12%	6%	11%	5%	6%	2%
My cell phone cannot do that	4%	8%	6%	5%	4%	5%	10%	6%
Concerns with identity theft	2%	<u>10%</u>	4%	5%	7%	7%	6%	2%
Concerns with fraud	4%	<u>9%</u>	10%	6%	11%	5%	8%	-
No bank account/Someone else does my banking	5%	4%	-	2%	5%	<u>9%</u>	-	2%
I prefer to do it personally	<u>5%</u>	2%	3%	6%	-	3%	3%	9%
Inconvenient (screen is too small)	3%	3%	2%	6%	-	2%	4%	7%
Too easy to lose phone and information	3%	3%	5%	-	4%	2%	2%	11%
I did not know I could do that	4%	1%	2%	3%	4%	3%	4%	-

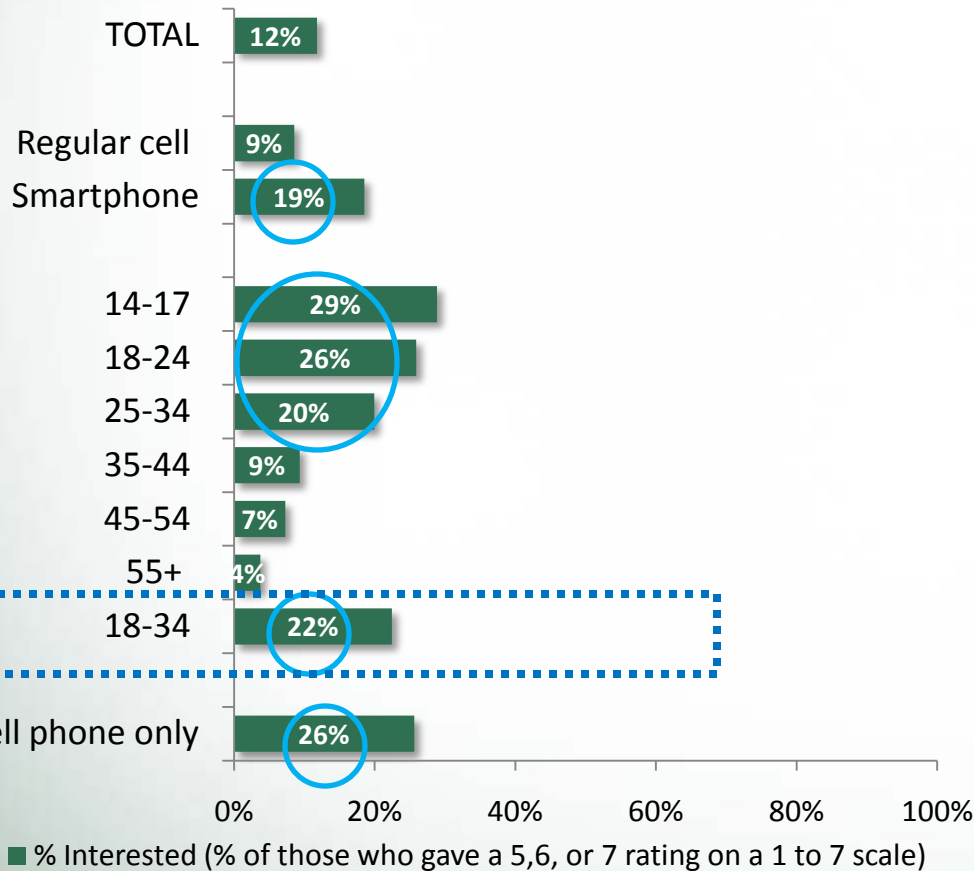
*Note: Statistical significant differences among groups are indicated with underlined numbers.

^A Caution – results are based on a small sample size: Smartphone owners in MB/SK who do not use their cell phone to manage some of their banking or to pay for products and services (n=25).

Interest in New Mobile Services and Concepts

Interest in Mobile Advertising

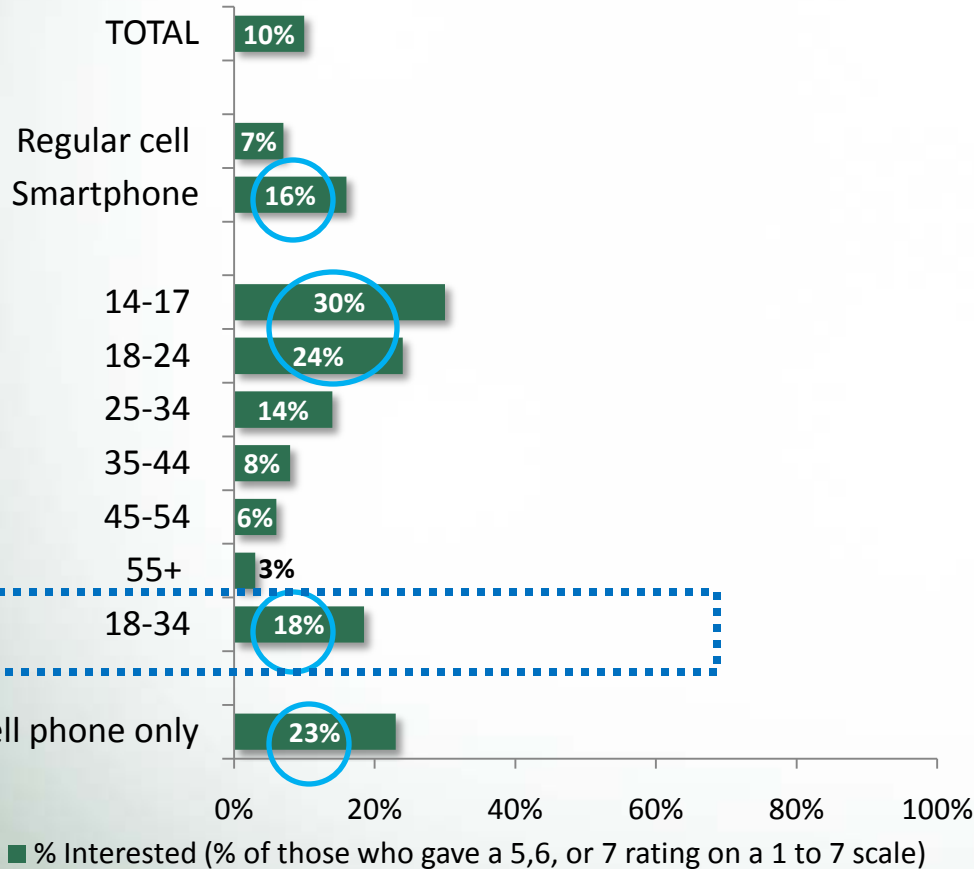
Interest in: "You could receive coupons to your cell phone from retailers of your choice in exchange for receiving ads on your cell."



- Overall interest in mobile advertising is moderate at best, however interest does become more noticeable among smartphone users and among cell only households. About one in ten mobile phone owners showed interest in receiving coupons from retailers (12%) in exchange for receiving ads on their cell.
- As seen throughout the report, interest in these new mobile services decreases with age. Mobile advertising is proving to be no different. Interest is markedly higher among mobile owners between 14 and 34 years old and lingers at roughly 4% among those at least 55 years old.
- One fifth (22%) of respondents between 18 and 34 years of age are interested in this type of mobile advertising.

Interest in Mobile Advertising

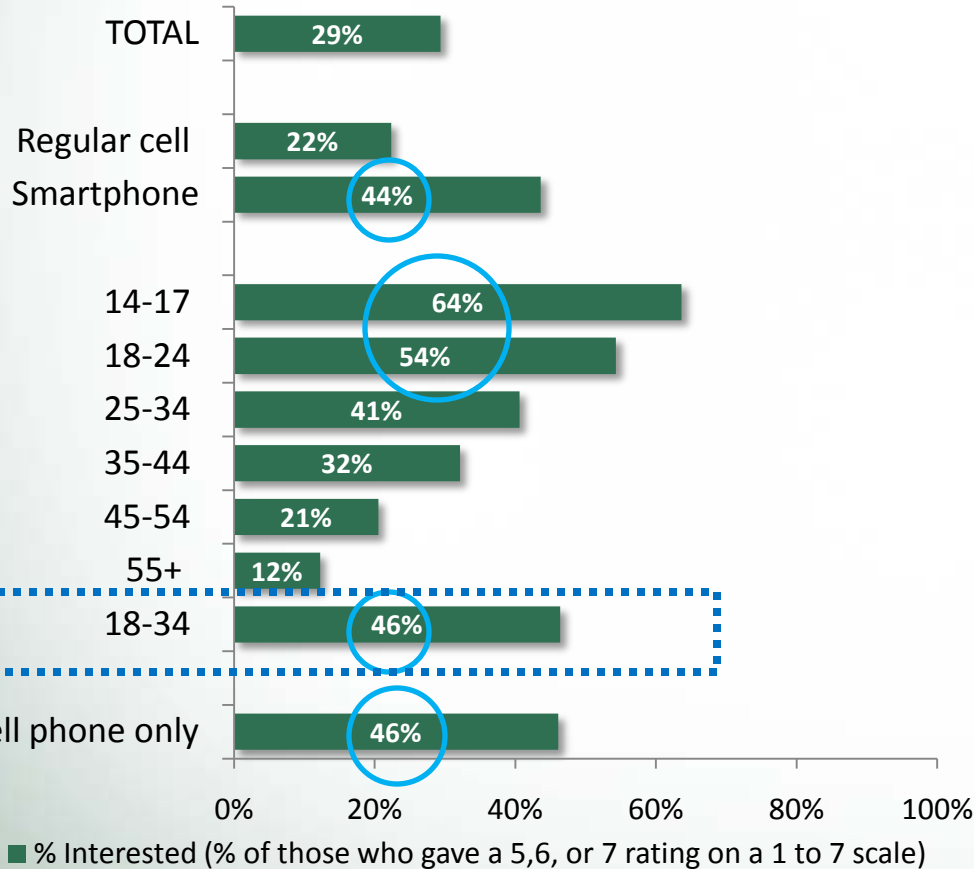
Interest in: "You could receive apps or exclusive content you are interested in for free in exchange for receiving ads on your cell."



- Similarly, interest becomes more noticeable among smartphone users and among cell only households. One in ten mobile phone owners (10%) would be interested in receiving apps or exclusive content in exchange for receiving ads on their device.
- Once again, interest in this proposed mobile advertising decreases with age. Interest is highest among mobile owners between 14 and 24 years old and lingers at roughly 3% among those at least 55 years old.
- Close to one fifth of respondents 18 to 34 years old (18%) are interested in this type of mobile advertising.

Interest in Location-Based Content

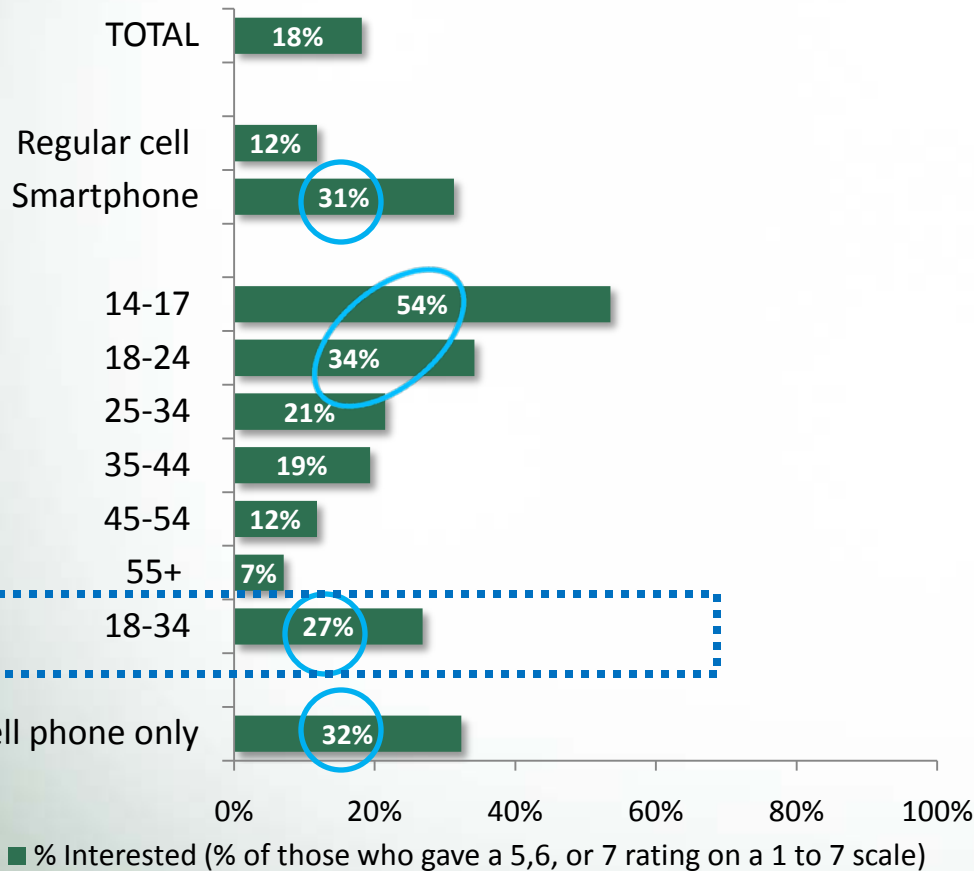
Interest in a service that would send information or coupons to the cell phone based on location at the time



- Three in ten mobile phone users (29%) show interest in the idea of having a service that would send information or coupons to their cell phone based on where they are at the time.
- Nearly half of respondents between 18 and 34 years of age (46%) are interested in this service.
- Those more likely to be interested include:
 - Cell phone only households (46%)
 - Smartphone users (44%)
 - The younger respondents are, the more likely they are to be interested in this idea.

Interest in Mobile Payments

Interest in swiping or waving the cell phone at a point of sale terminal or scanner



- Almost one in five (18%) are interested in the idea of swiping or waving their cell phone at a point of sale terminal or scanner.
- Over one quarter of respondents between 18 and 34 years old (27%) are interested in swiping or waving their phone for a purchase.
- Those more likely to be interested include:
 - Cell phone only households (32%)
 - Smartphone users (31%)
 - Men (22%)
 - The younger respondents are, the more likely they are to be interested in this idea.

Interest in Mobile Advertising, Payments and Location-Based Content

- By Gender and Region

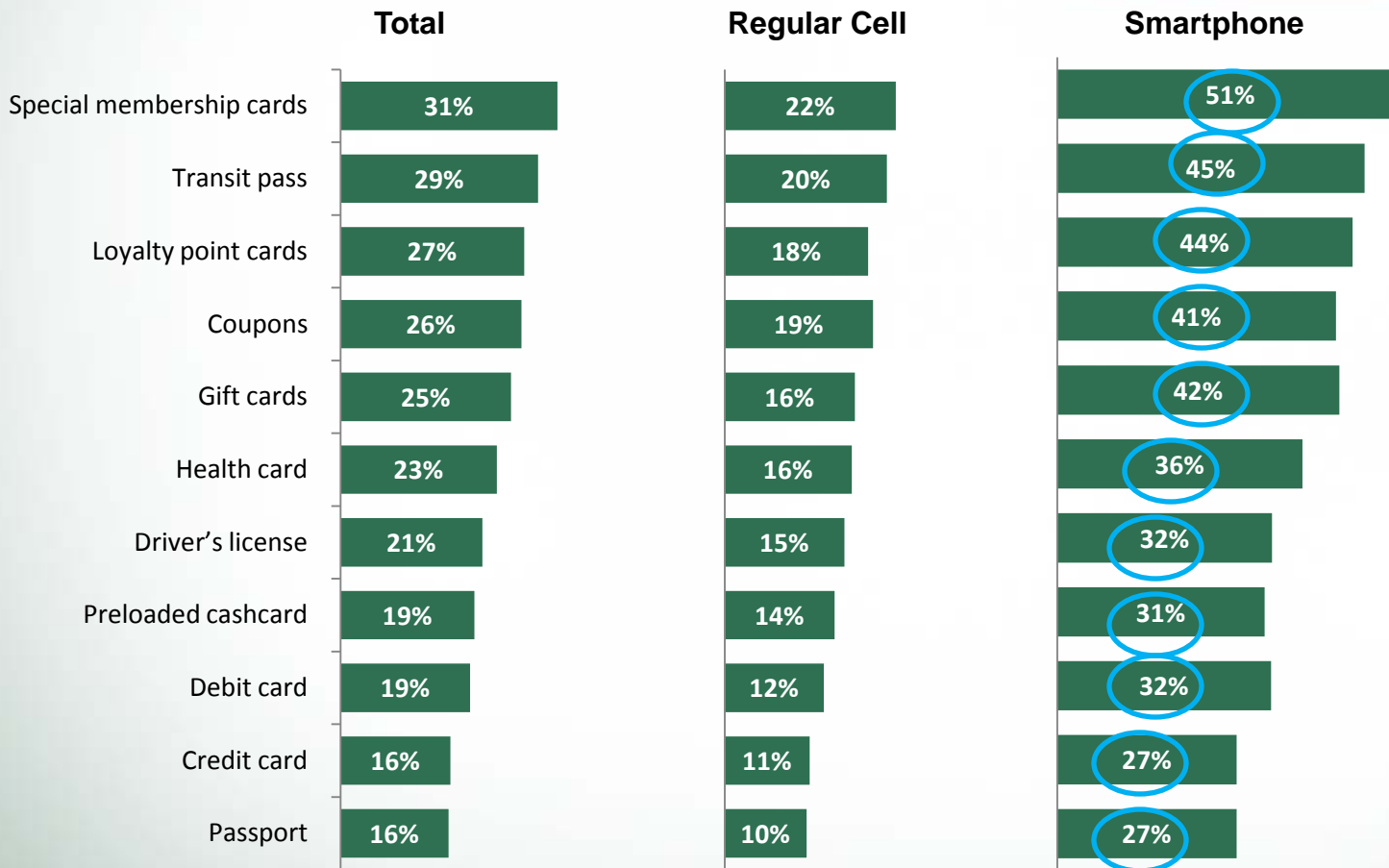
% of respondents giving a 5,6,or 7 rating	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Receiving coupons to your cell phone from retailers of your choice in exchange for receiving ads on your cell	12%	12%	11%	14%	9%	<u>14%</u>	9%	8%
Receiving apps or exclusive content you are interested in for free in exchange for receiving ads on your cell	11%	10%	7%	9%	10%	<u>11%</u>	11%	10%
A service that would send information or coupons to the cell phone based on location at the time	30%	29%	<u>30%</u>	25%	25%	<u>34%</u>	27%	20%
Swiping or waving the cell phone at a point of sale terminal or scanner	<u>22%</u>	14%	<u>20%</u>	20%	13%	<u>21%</u>	14%	13%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Interest in Storing Information on a Mobile Phone

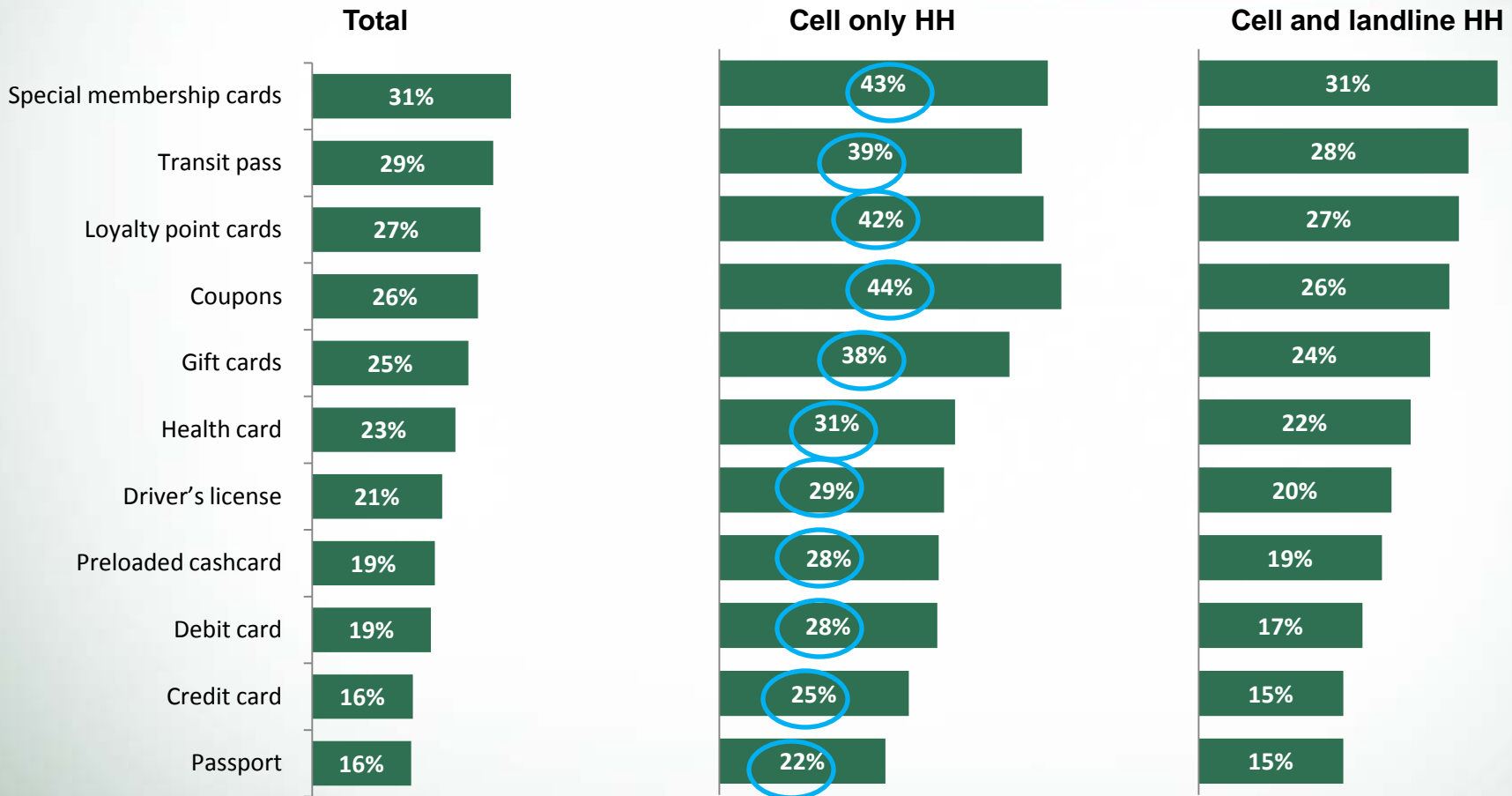
- To further explore the appeal of the concept of a “mobile wallet”, respondents were asked how interested they might be in storing various types of digital information on their mobile phone rather than carry around the paper or card versions. “Interested respondents” in the following slides refers to the proportion of respondents who gave a 5, 6, or 7 rating on the 1 to 7 scale.
- Special membership cards (31%), transit passes (29%), loyalty point cards (27%) and gift cards (25%) were the types of cards respondents would be most interested in transferring to their phones.
- Respondents were more reluctant to store their driver’s licence information (21%), preloaded cashcards (19%), debit card (19%), credit card (16%), or passport information (16%) on their mobile phones.
- Similar to other concepts explored in this research, interest in this concept is noticeably higher among:
 - Cell phone only households
 - Smartphone users
 - Men (except for storing loyalty point cards, coupons, or gift cards, where there is no difference between men and women)
 - The younger respondents are, the more likely they are to be interested in storing the various types of information on their cell phone. In fact, for nearly all types of information, interest hovered in and around 50% among mobile owners between 14 and 17 years old.

Interest in Storing Information on a Mobile Phone



% of respondents who gave a 5, 6, or 7 rating on a 1 to 7 scale

Interest in Storing Information on a Mobile Phone



% of respondents who gave a 5, 6, or 7 rating on a 1 to 7 scale

Interest in Storing Information on a Mobile Phone

- By Age Group

% of respondents giving a 5,6,or 7 rating	Age Groups						18-34
	14-17	18-24	25-34	35-44	45-54	55+	
Special membership cards	<u>53%</u>	<u>51%</u>	<u>43%</u>	<u>38%</u>	<u>25%</u>	15%	<u>46%</u>
Transit pass	<u>56%</u>	<u>46%</u>	<u>41%</u>	<u>32%</u>	<u>22%</u>	13%	<u>43%</u>
Loyalty point cards	<u>25%</u>	<u>36%</u>	<u>43%</u>	<u>38%</u>	<u>20%</u>	13%	<u>40%</u>
Coupons	<u>43%</u>	<u>46%</u>	<u>43%</u>	<u>34%</u>	<u>17%</u>	9%	<u>44%</u>
Gift cards	<u>55%</u>	<u>47%</u>	<u>34%</u>	<u>28%</u>	<u>18%</u>	8%	<u>40%</u>
Health card	<u>56%</u>	<u>34%</u>	<u>24%</u>	<u>25%</u>	<u>19%</u>	12%	<u>28%</u>
Driver's license	<u>60%</u>	<u>34%</u>	<u>21%</u>	<u>21%</u>	15%	11%	<u>26%</u>
Preloaded cashcard	<u>45%</u>	<u>33%</u>	<u>27%</u>	<u>24%</u>	<u>12%</u>	7%	<u>30%</u>
Debit card	<u>50%</u>	<u>32%</u>	<u>20%</u>	<u>20%</u>	12%	11%	<u>25%</u>
Credit card	<u>48%</u>	<u>25%</u>	<u>14%</u>	<u>18%</u>	<u>13%</u>	8%	<u>19%</u>
Passport	<u>49%</u>	<u>25%</u>	13%	<u>16%</u>	11%	10%	<u>18%</u>

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Interest in Storing Information on a Mobile Phone

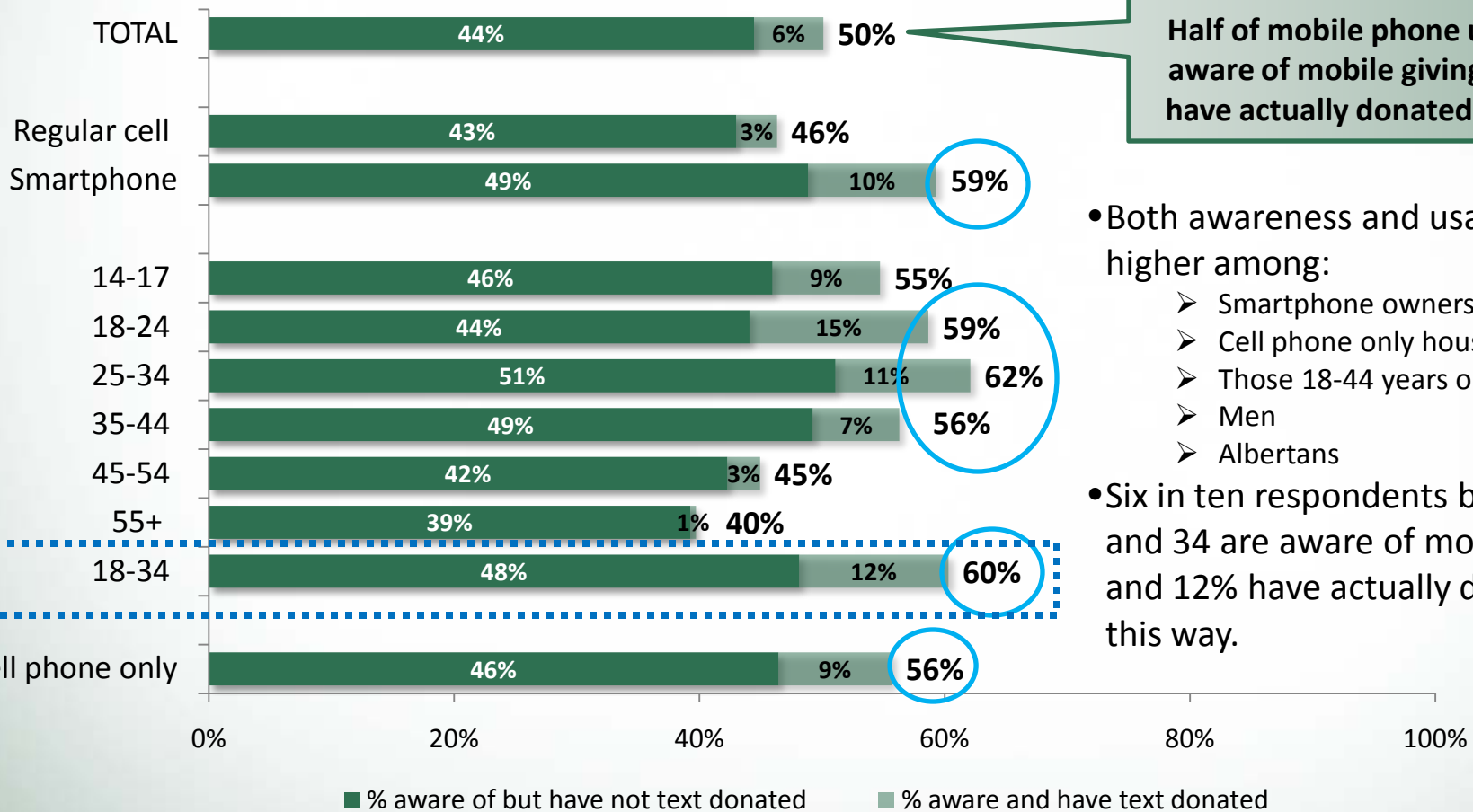
- By Gender and Region

% of respondents giving a 5,6,or 7 rating	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Special membership cards	33%	29%	32%	<u>38%</u>	25%	<u>33%</u>	28%	26%
Transit pass	<u>32%</u>	26%	<u>30%</u>	27%	24%	<u>29%</u>	<u>32%</u>	18%
Loyalty point cards	27%	26%	<u>26%</u>	<u>31%</u>	16%	<u>29%</u>	<u>26%</u>	23%
Coupons	26%	26%	25%	<u>32%</u>	18%	<u>29%</u>	23%	23%
Gift cards	27%	23%	26%	<u>28%</u>	17%	<u>27%</u>	23%	21%
Health card	<u>26%</u>	20%	21%	28%	18%	22%	23%	23%
Driver's license	<u>24%</u>	18%	18%	16%	20%	22%	22%	18%
Preloaded cashcard	<u>22%</u>	17%	18%	20%	15%	21%	20%	14%
Debit card	<u>22%</u>	15%	19%	16%	17%	20%	19%	15%
Credit card	<u>19%</u>	13%	15%	14%	13%	18%	15%	15%
Passport	<u>19%</u>	13%	15%	17%	14%	16%	16%	12%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Mobile Giving

Awareness and Usage of Mobile Giving



Half of mobile phone users are aware of mobile giving and 6% have actually donated this way

- Both awareness and usage are higher among:
 - Smartphone owners
 - Cell phone only households
 - Those 18-44 years old
 - Men
 - Albertans
- Six in ten respondents between 18 and 34 are aware of mobile giving, and 12% have actually donated this way.

Awareness and Usage of Mobile Giving

- By Gender and Region

	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Aware of mobile giving:	<u>54%</u>	46%	<u>55%</u>	<u>63%</u>	47%	<u>56%</u>	37%	38%
Aware and have text donated	<u>7%</u>	4%	5%	<u>10%</u>	4%	<u>7%</u>	3%	3%
Aware but have not text donated	<u>47%</u>	42%	<u>50%</u>	<u>53%</u>	43%	<u>49%</u>	34%	35%

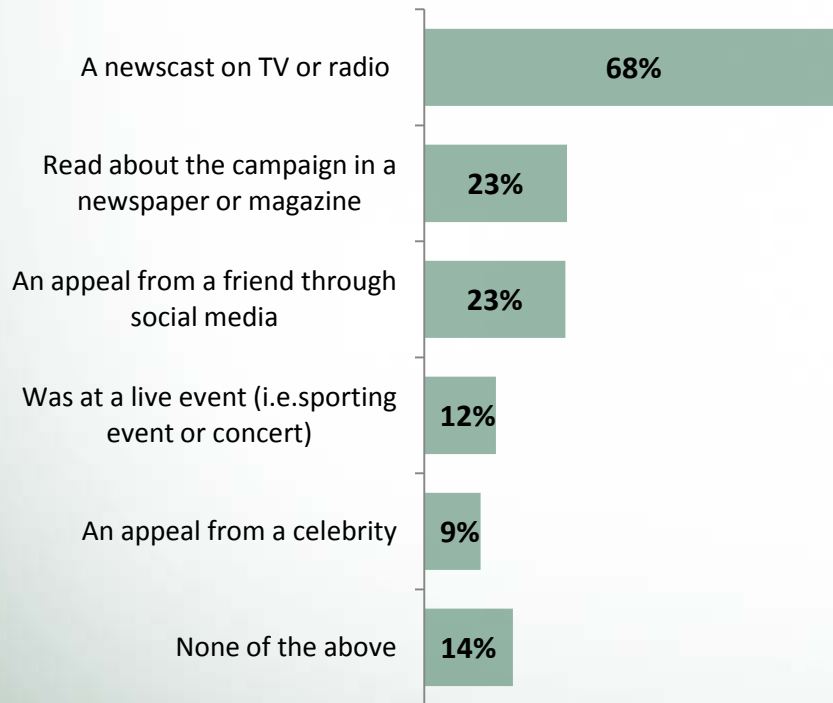
*Note: Statistical significant differences among groups are indicated with underlined numbers. The addition of the bottom-two rows may not add exactly to the top row due to rounding.

What Has Prompted Previous Mobile Donations

Among those who have already donated using text messaging (6% of cell phone users)

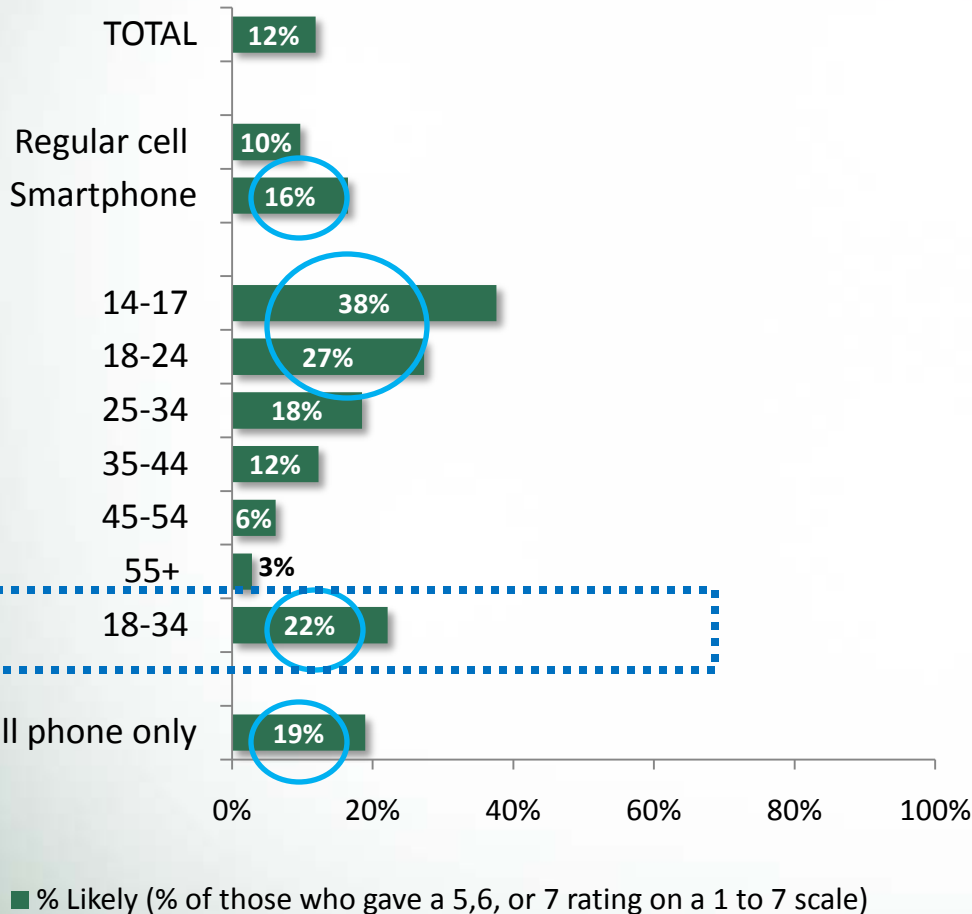


What prompted the mobile donations?



- Among the 6% of mobile phone users who have donated using text messaging, over two thirds (68%) were prompted by a newscast on TV or radio.

Future Intentions



- Without a specific cause or appeal in mind, 12% of those who have never made a donation via texting say they would do so in the future if they were instructed on how to do it.
- One fifth (22%) of respondents between 18 and 34 years of age who have never made a text donation say they would do so in the future.
- Those more likely to say they would donate in the future include:
 - Smartphone owners (16%)
 - Cell only households (19%)
 - The younger respondents are, the more likely they are to say they would donate in the future.

Future Intentions

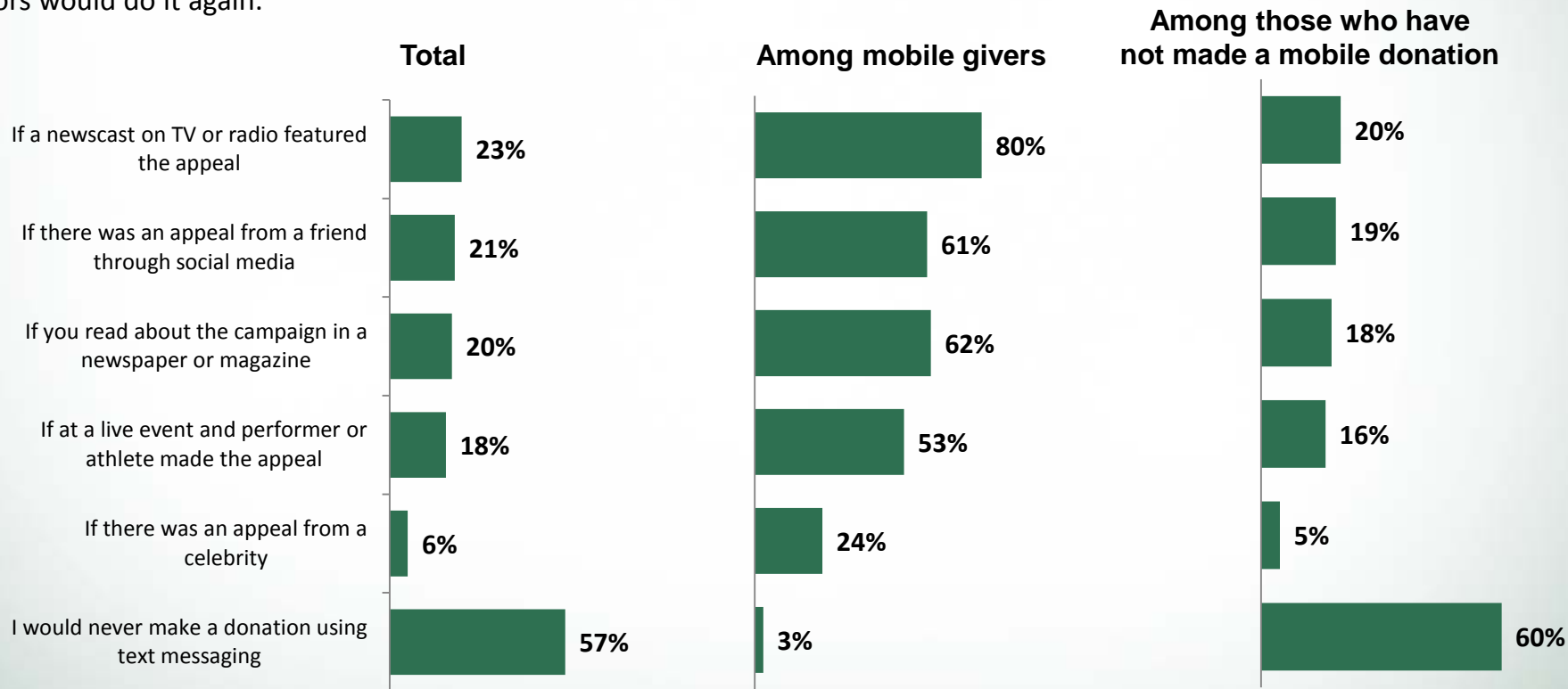
- By Gender and Region

% of respondents giving a 5,6,or 7 rating	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
Likely to give a donation in the future	11%	13%	12%	<u>15%</u>	10%	<u>14%</u>	9%	10%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

What Would Prompt a Text Donation

- Results suggest that, even though only 6% have previously done so, it seems 39% of cell phone users would donate given the right circumstances and the right appeal. Although previous mobile donors were especially moved to action by appeals through a newscast on TV or radio, other types of appeal would also prove effective. Results also show that nearly all previous text donors would do it again.



What Would Prompt a Text Donation

- By Age Group

	Age Groups						18-34
	14-17	18-24	25-34	35-44	45-54	55+	
If a newscast on TV or radio featured the appeal	<u>51%</u>	<u>41%</u>	<u>37%</u>	24%	18%	7%	<u>39%</u>
If there was an appeal from a friend through social media	<u>52%</u>	<u>39%</u>	<u>33%</u>	22%	15%	6%	<u>35%</u>
If you read about the campaign in a newspaper or magazine	<u>38%</u>	<u>40%</u>	<u>29%</u>	20%	14%	9%	<u>33%</u>
If at a live event and performer or athlete made the appeal	<u>57%</u>	<u>42%</u>	22%	17%	13%	4%	<u>30%</u>
If there was an appeal from a celebrity	<u>22%</u>	<u>17%</u>	8%	2%	4%	1%	<u>12%</u>
I would never make a donation using text messaging	7%	25%	42%	<u>58%</u>	<u>65%</u>	<u>79%</u>	35%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

What Would Prompt a Text Donation

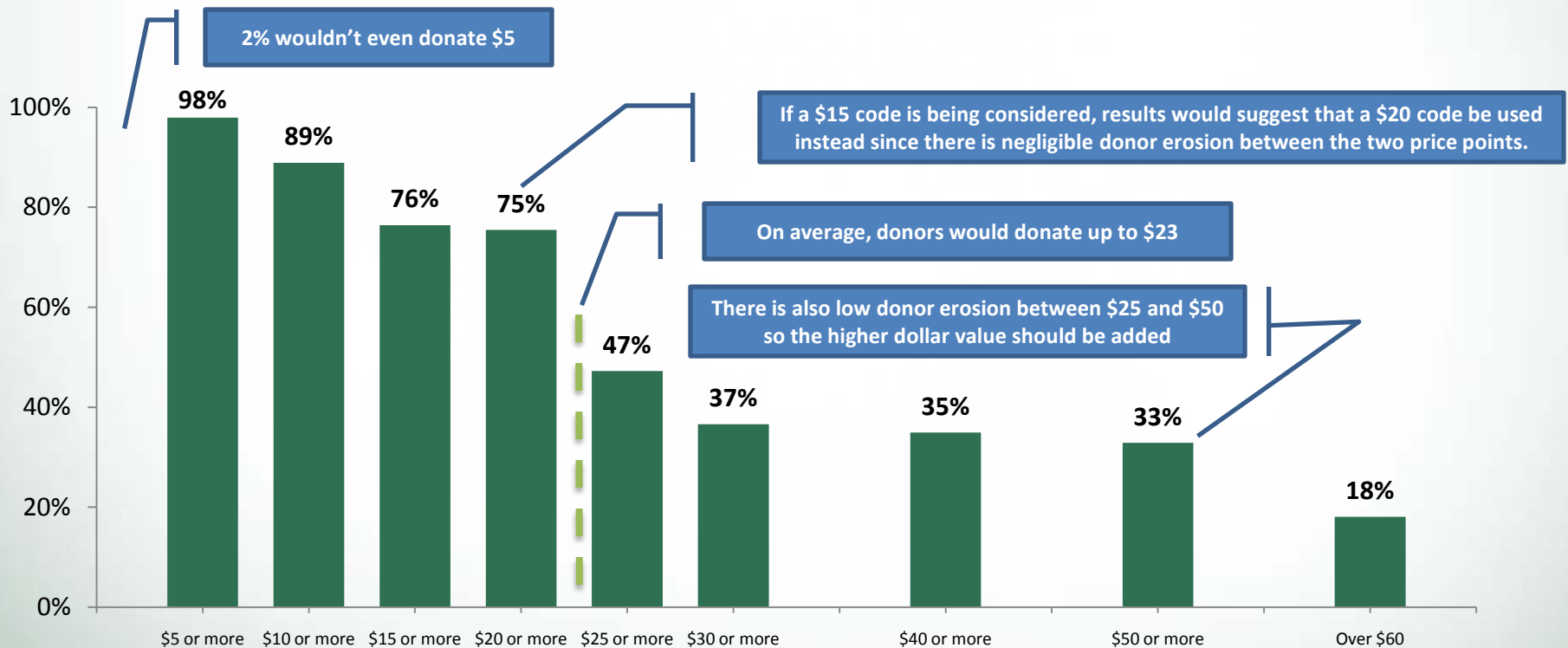
- By Gender and Region

	Gender		Region					
	Male	Female	BC	AB	MB/SK	ON	QC	ATL
If a newscast on TV or radio featured the appeal	24%	23%	23%	26%	15%	<u>27%</u>	21%	17%
If there was an appeal from a friend through social media	22%	20%	21%	24%	20%	21%	21%	16%
If you read about the campaign in a newspaper or magazine	22%	19%	19%	22%	17%	<u>24%</u>	15%	16%
If at a live event and performer or athlete made the appeal	19%	17%	16%	24%	17%	19%	18%	12%
If there was an appeal from a celebrity	5%	6%	5%	7%	8%	6%	6%	3%
I would never make a donation using text messaging	55%	58%	55%	50%	62%	56%	58%	65%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Text Donation Thresholds

- Currently, those wanting to make a donation using text messaging can only choose codes for \$5 and \$10. When asked what is the highest one-time dollar amount they would like to be able to make assuming they were not limited by these amounts, 89% of previous and “interested” donors would give \$10 or more. In fact, 75% would give \$20 or more and 32% would give \$50 or more.



Text Donation Thresholds

- By Age

	Age Groups						
	14-17	18-24	25-34	35-44	45-54	55+	18-34
\$5 or more	96%	96%	99%	100%	100%	97%	98%
\$10 or more	79%	88%	89%	<u>95%</u>	92%	93%	88%
\$15 or more	60%	72%	<u>84%</u>	<u>85%</u>	<u>82%</u>	72%	<u>78%</u>
\$20 or more	55%	72%	<u>83%</u>	<u>85%</u>	<u>82%</u>	72%	<u>77%</u>
\$25 or more	34%	41%	50%	<u>56%</u>	<u>56%</u>	55%	45%
\$30 or more	27%	32%	38%	<u>49%</u>	44%	31%	34%
\$40 or more	22%	30%	37%	<u>49%</u>	<u>44%</u>	31%	33%
\$50 or more	19%	26%	<u>35%</u>	<u>48%</u>	<u>44%</u>	31%	30%
Over \$60	3%	<u>16%</u>	<u>18%</u>	<u>32%</u>	<u>28%</u>	<u>21%</u>	<u>16%</u>

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Text Donation Thresholds

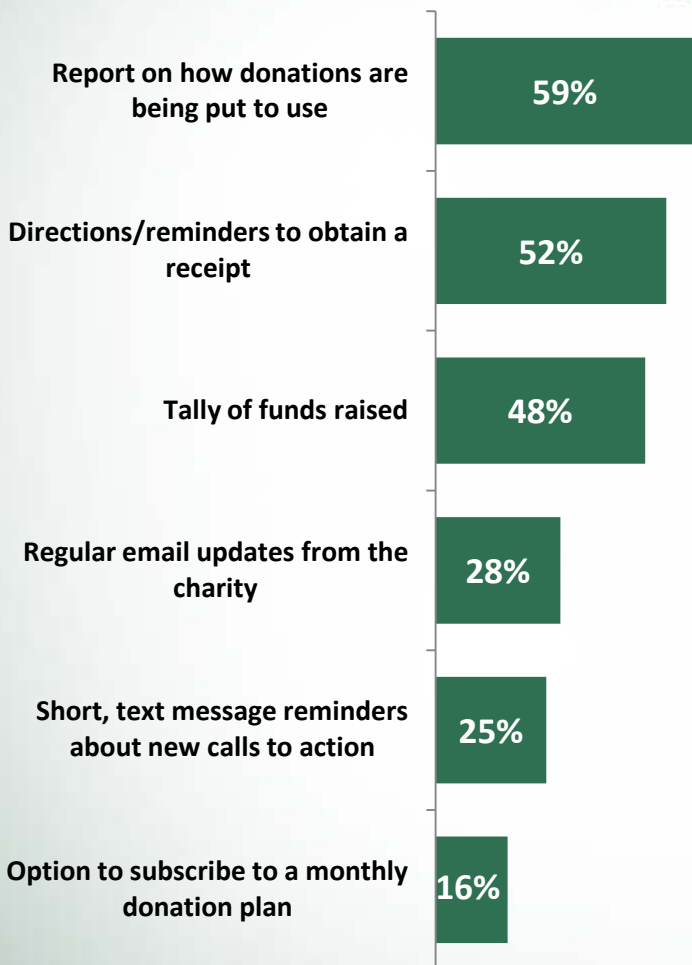
- By Province

	Gender		Region					
	Male	Female	BC	AB	MB/SK ^A	ON	QC	ATL ^A
\$5 or more	99%	97%	94%	<u>100%</u>	100%	98%	99%	100%
\$10 or more	87%	90%	87%	87%	84%	89%	89%	100%
\$15 or more	76%	77%	75%	<u>87%</u>	79%	77%	68%	76%
\$20 or more	74%	76%	73%	<u>85%</u>	79%	76%	68%	76%
\$25 or more	46%	49%	49%	54%	58%	48%	38%	38%
\$30 or more	36%	37%	34%	41%	53%	37%	34%	19%
\$40 or more	36%	33%	33%	41%	53%	35%	32%	19%
\$50 or more	35%	31%	33%	38%	53%	32%	29%	19%
Over \$60	22%	14%	18%	21%	32%	18%	16%	5%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

^A Caution – results are based on small sample sizes: Respondents in MB/SK who are likely to make a text donation in the future, and who have already made a text donation, DK'S excluded (n=19); in Atlantic provinces (n=25).

Interest in Follow-Up Options



■ % Interested (% of those who gave a 5,6, or 7 rating on a 1 to 7 scale)

- At least half of actual and potential text donors say they would like to...
 - ...receive a report on how donations are being used (59%). Those who are between 18 and 24 are more likely to be interested in this report (72%) compared to older respondents;
 - ...directions or reminders on how to obtain a receipt (52%). Women (60%) are more likely to be interested in this; and
 - ...have a tally of the funds raised (48%). Those under 35 years of age are more likely to be interested in this (55%), compared to older respondents.
- Less than one third of actual and potential text donors are interested in:
 - Regular email updates from the charity (28%). Those between 18 and 24 years of age are more likely to be interested in this (38%), compared to those at least 35 years old (19%);
 - Short, text message reminders about new calls to action (25%). Those under 25 years of age are more likely to be interested in this (35%), compared to those between 25 and 44 (16%); and
 - 16% are interested in the option to subscribe to a monthly donation plan.

- Four in five (81%) actual and potential text-donors are interested in at least one of these follow-up options.

Q34. Charities can follow up with donors in a variety of ways. How interested would you be in the following after you've made a donation through your cell phone? Base: Respondents who are likely to make a text donation in the future, and respondents who have already made a text donation; n=410

Interest in Follow-Up Options

- By Age Group

	Age Groups						18-34
	14-17	18-24	25-34	35-44	45-54	55+	
Report on how donations are being put to use	<u>67%</u>	<u>72%</u>	53%	53%	52%	38%	<u>62%</u>
Directions/reminders to obtain a receipt	51%	46%	58%	52%	53%	57%	52%
Tally of funds raised	<u>52%</u>	<u>60%</u>	<u>53%</u>	34%	35%	30%	<u>56%</u>
Regular email updates from the charity	<u>33%</u>	<u>38%</u>	<u>29%</u>	22%	18%	13%	<u>34%</u>
Short, text message reminders about new calls to action	<u>36%</u>	<u>35%</u>	19%	13%	25%	19%	<u>27%</u>
Option to subscribe to a monthly donation plan	18%	<u>22%</u>	16%	7%	14%	<u>24%</u>	<u>19%</u>

*Note: Statistical significant differences among groups are indicated with underlined numbers.

Interest in Follow-Up Options

- By Gender and Region

	Gender		Region					
	Male	Female	BC	AB	MB/SK ^A	ON	QC	ATL ^A
Report on how donations are being put to use	58%	59%	54%	63%	80%	57%	58%	49%
Directions/reminders to obtain a receipt	45%	<u>60%</u>	61%	49%	69%	49%	57%	32%
Tally of funds raised	46%	49%	45%	46%	62%	43%	58%	42%
Regular email updates from the charity	27%	29%	29%	30%	28%	25%	33%	30%
Short, text message reminders about new calls to action	20%	<u>30%</u>	26%	25%	17%	24%	30%	20%
Option to subscribe to a monthly donation plan	14%	19%	15%	21%	14%	16%	16%	12%

*Note: Statistical significant differences among groups are indicated with underlined numbers.

^A Caution – results are based on small sample sizes: Respondents in MB/SK who are likely to make a text donation in the future, and who have already made a text donation (n=24); in Atlantic provinces (n=27).