

2011 Mobile Giving Study

Prepared for: CWTA

April 29, 2011

Part of the 2011 Cell Phone Consumer Attitudes Study

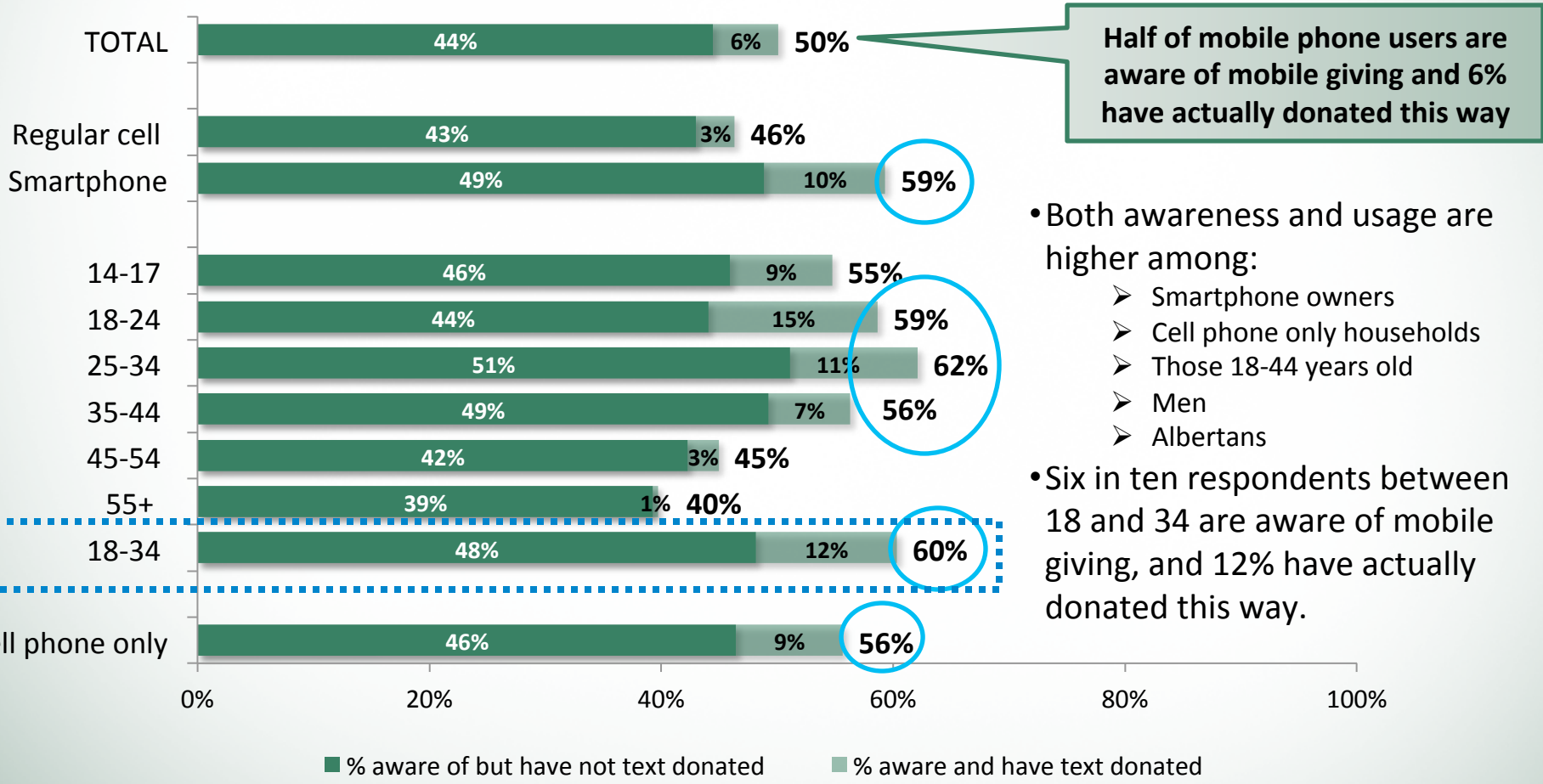
Mobile Giving

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%).

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%

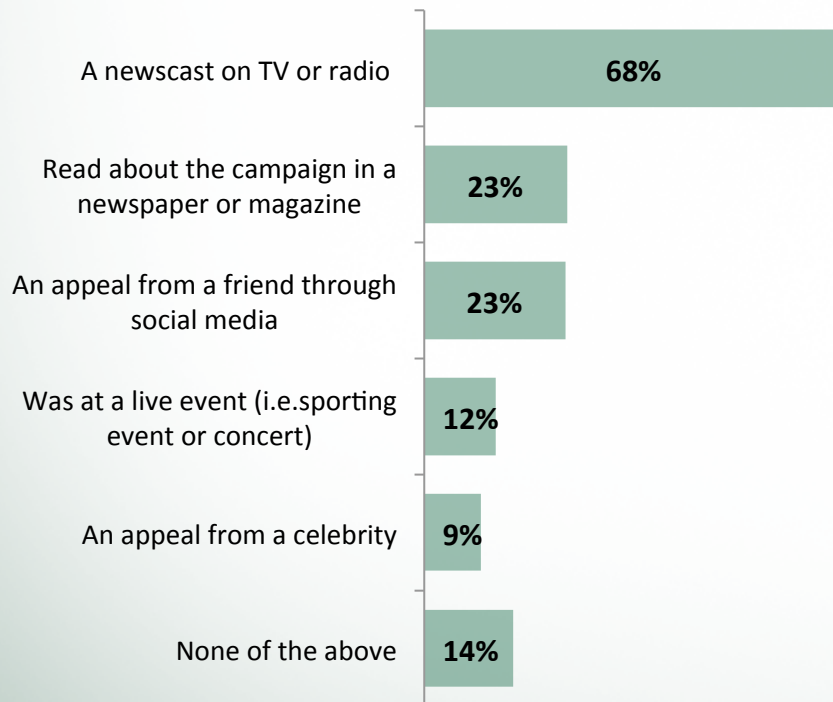
*Note: Statistical significant differences among groups are indicated with underlined numbers. The addition of the bottom-two rows may not add exactly to the top row due to rounding.

What Has Prompted Previous Mobile Donations

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

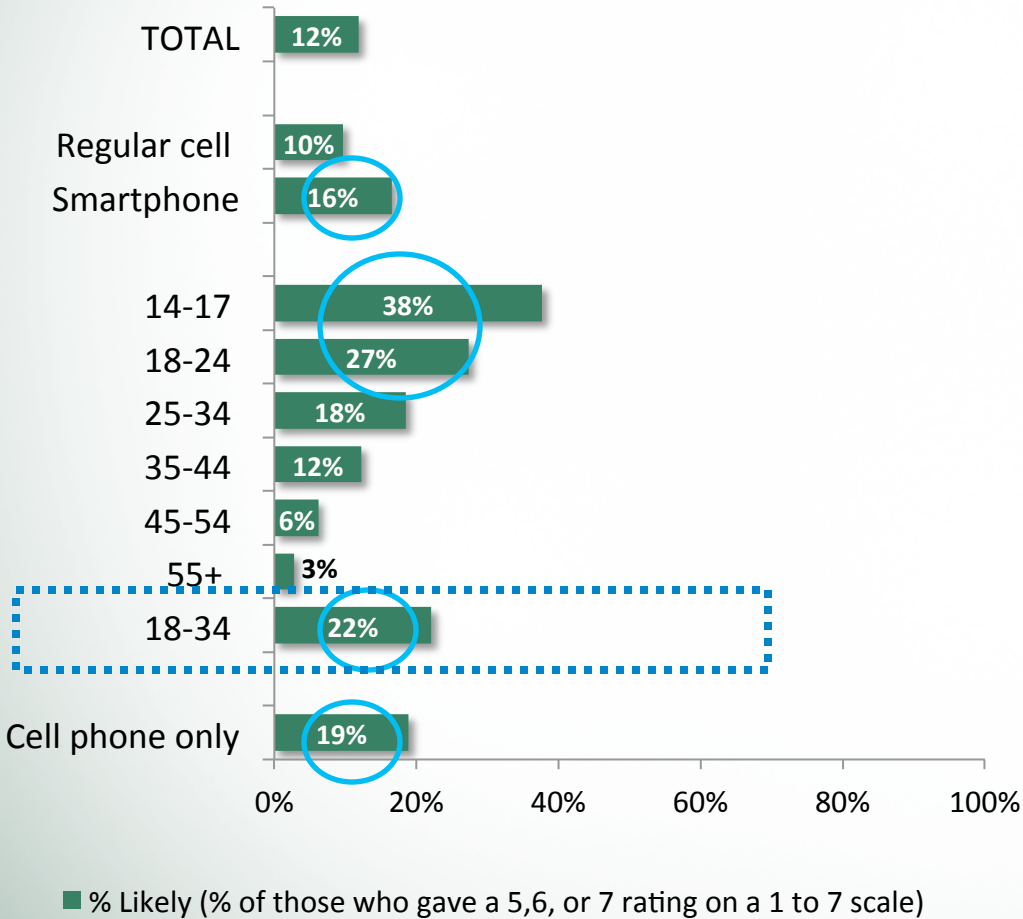


What prompted the mobile donations?



- 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

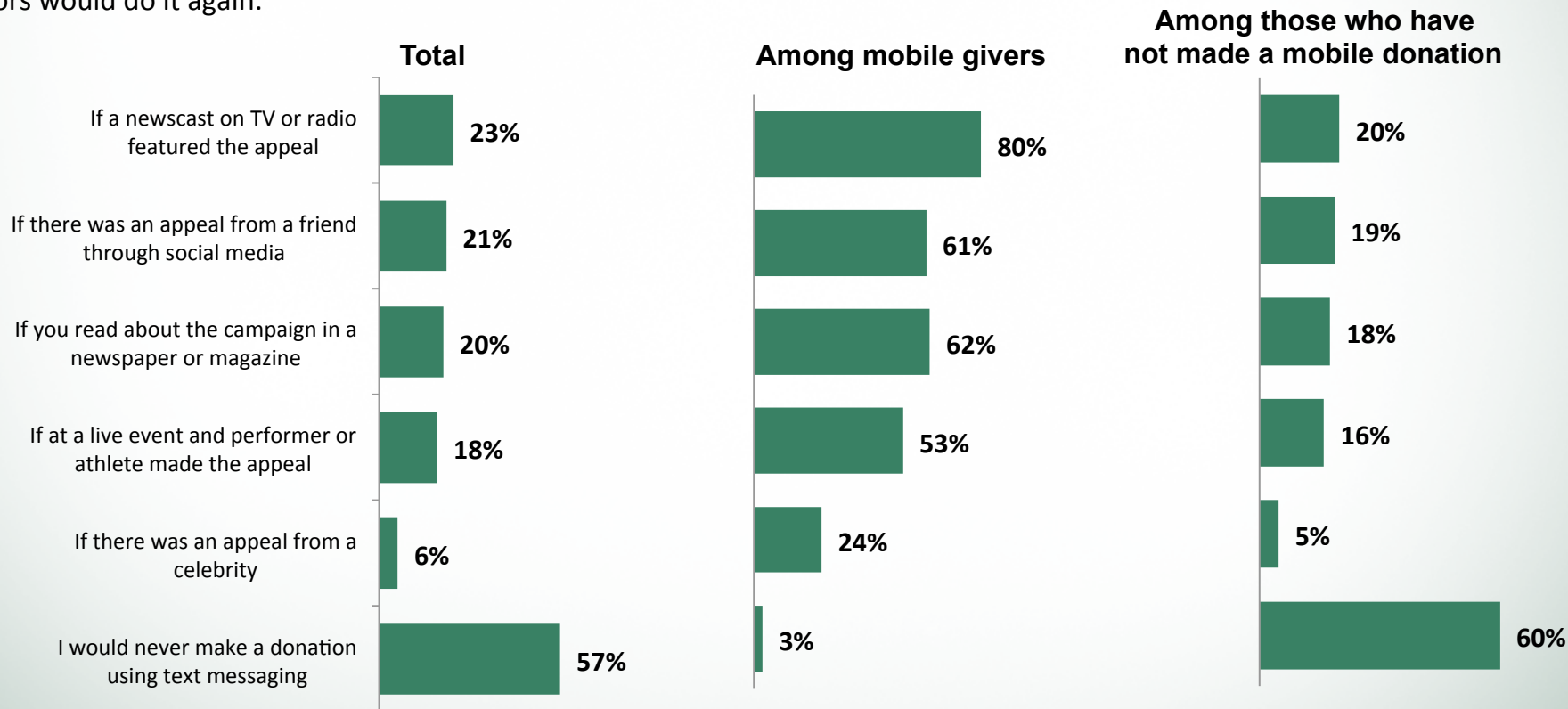
- By Gender and Region

% 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

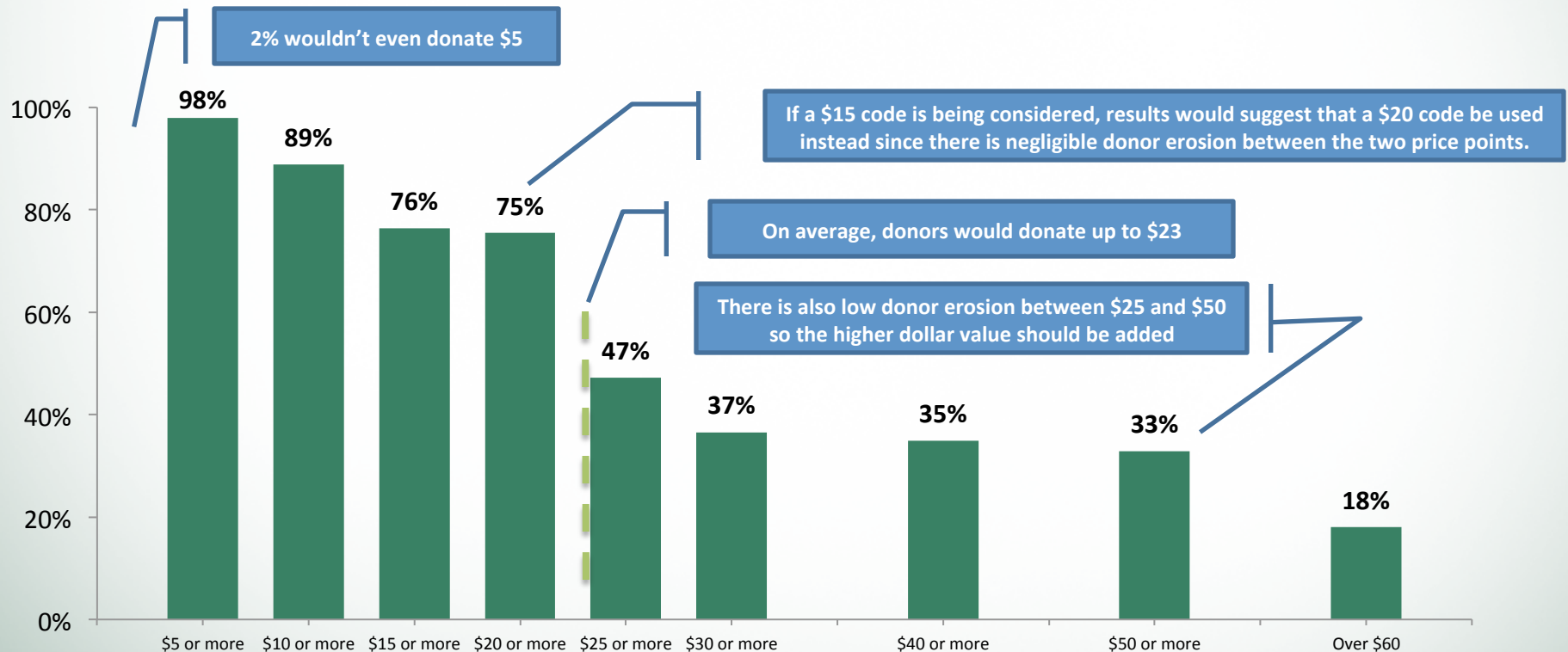
- By Gender and Region

	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

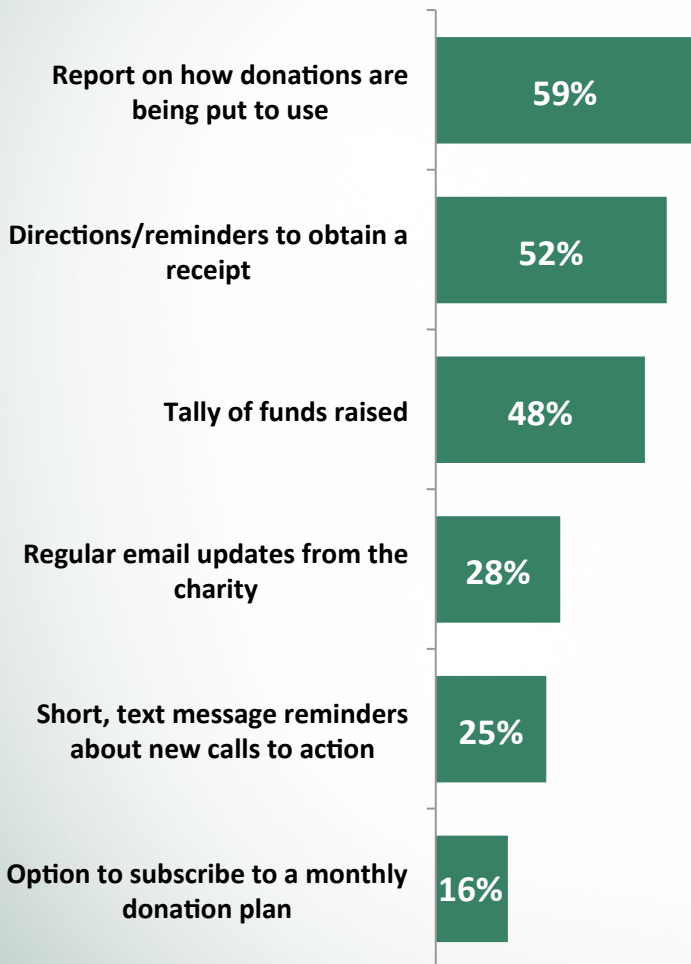
- By Province

	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



- 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.

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

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).

Research Methodology

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

- Results for the comparison group “Households with both cell and land line” is not displayed when compared to “Cell phone only households”.