



Understanding our customers

Change Maker Conference

I'm going to talk about...

1

Customer Experience

2

Latest research insights

3

Opportunities

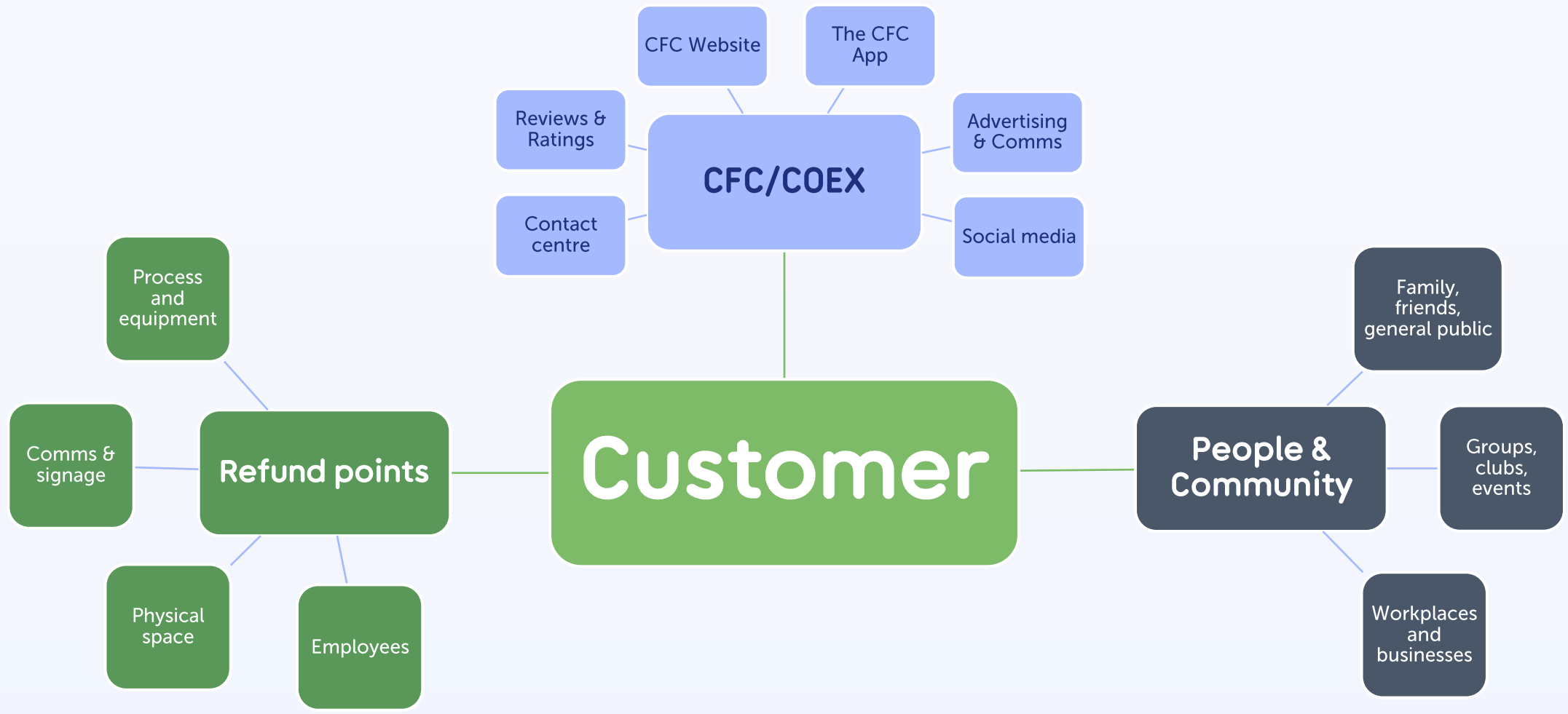


A low-angle, upward-looking photograph of several people's hands and forearms reaching towards the center. They are holding various beverages: a clear plastic bottle, a brown paper cup, a green plastic bottle, and a white paper cup. The background is a solid, deep blue color. The overall mood is one of unity and shared experience.

1. Customer Experience

**The sum of every
interaction a
customer has
with us.**





The role of CX

Understand and design the end-to-end customer experience, so that we can **grow lifetime value.**

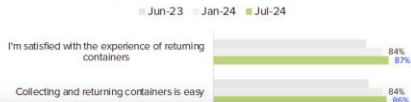


Understanding the big picture

	Containerless Crusaders			Rubbish Rationalisers			Community Contributors			Cashie Kings			Small Change Makers			Moneymakers			Environmentalists		
	Jun 2023	Jan 2024	Jul 2024	Jun 2023	Jan 2024	Jul 2024	Jun 2023	Jan 2024	Jul 2024	Jun 2023	Jan 2024	Jul 2024	Jun 2023	Jan 2024	Jul 2024	Jun 2023	Jan 2024	Jul 2024	Jun 2023	Jan 2024	Jul 2024
Individual & household participation	40%	56%	50%	43%	50%	44%	45%	54%	54%	55%	58%	63%	76%	78%	80%	94%	96%	97%	91%	94%	97%
Direct participant	40%	34%	32%	43%	41%	40%	45%	41%	43%	55%	53%	57%	76%	68%	76%	94%	94%	96%	91%	79%	89%
Indirect participant	0%	22%	17%	0%	9%	4%	0%	13%	12%	0%	4%	6%	0%	10%	4%	0%	3%	1%	0%	16%	7%
Unaware	7%	7%	4%																		
Rejection	7%	6%	8%																		
Pre-contemplation	9%	7%	9%																		
Contemplation	36%	23%	29%																		
Column Sample Size	454	388	37																		

Customer return experiences have improved across the board, especially for Cashie Kings and Containerless Crusaders

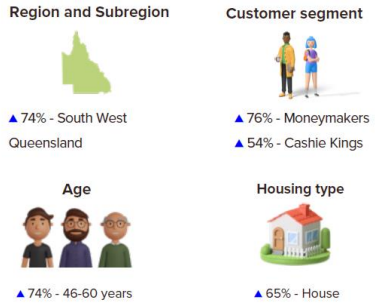
Customer experience (Agree)



Which customer segment has the most significant improvements in customer experience in this wave?



Who is likely to be a promoter for Containers for Change this wave?



2,500 Queenslanders surveyed each January and June

Questions covering awareness, participation, satisfaction, motivations, barriers

Analyse changes in our customer segmentation splits

Additional member survey each Jan – 5,000 respondents



Understanding your region

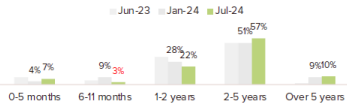
North QLD Participants

Staff have always been friendly and helpful. Even took my granddaughter with to teach her and the entire experience was just positive

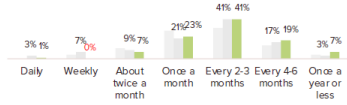
It's good but could be slightly improved with faster processing

It's a good scheme, just the wait in line is sometimes inconvenient with kids in the car

How long they've been participating

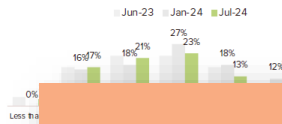


How often they make a return

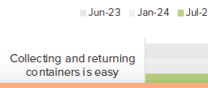


- North Queensland participants are less likely to return weekly at this year (July), compared with January.
- Twice as many people prefer bank transfers this wave, mostly at the expense of donating their refund to a charity.

Dollars received per average return



Customer experience



We speak to a cross-section of Queenslanders across the state.

Sunshine Coast & Wide Bay refund point experiences

Great it has 4 bays and usually don't have to wait for long
- Change Exchange - Beerwah

We have excellent service there. The space is always tidy and clean. They are very accommodating of children helping. They have spaces for you to wash your hands after you are finished
- Return-It - West Caloundra

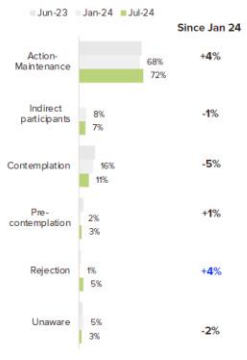
Central QLD

- Most measures in Central QLD have remained stable.
- There is a small but significant increase in *rejectors* – people who say they've taken part but probably won't again.
- Significantly more people know where to return their containers.

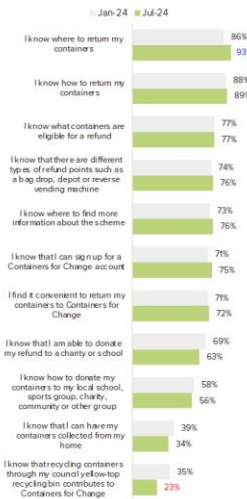
Customer Segment



Scheme Participation



Scheme Knowledge



Prompted brand awareness



App usage



Likelihood to recommend (7-10)



Customer Satisfaction (7-10)



Trust



Our team's focus

RESEARCH & INSIGHTS

Deepening our understanding by surveying, interviewing, observing, and listening to customers.

JOURNEY MAPPING

Mapping customer experiences across time and places.



VOICE OF CUSTOMER

Bringing all the data together to see trends and change.

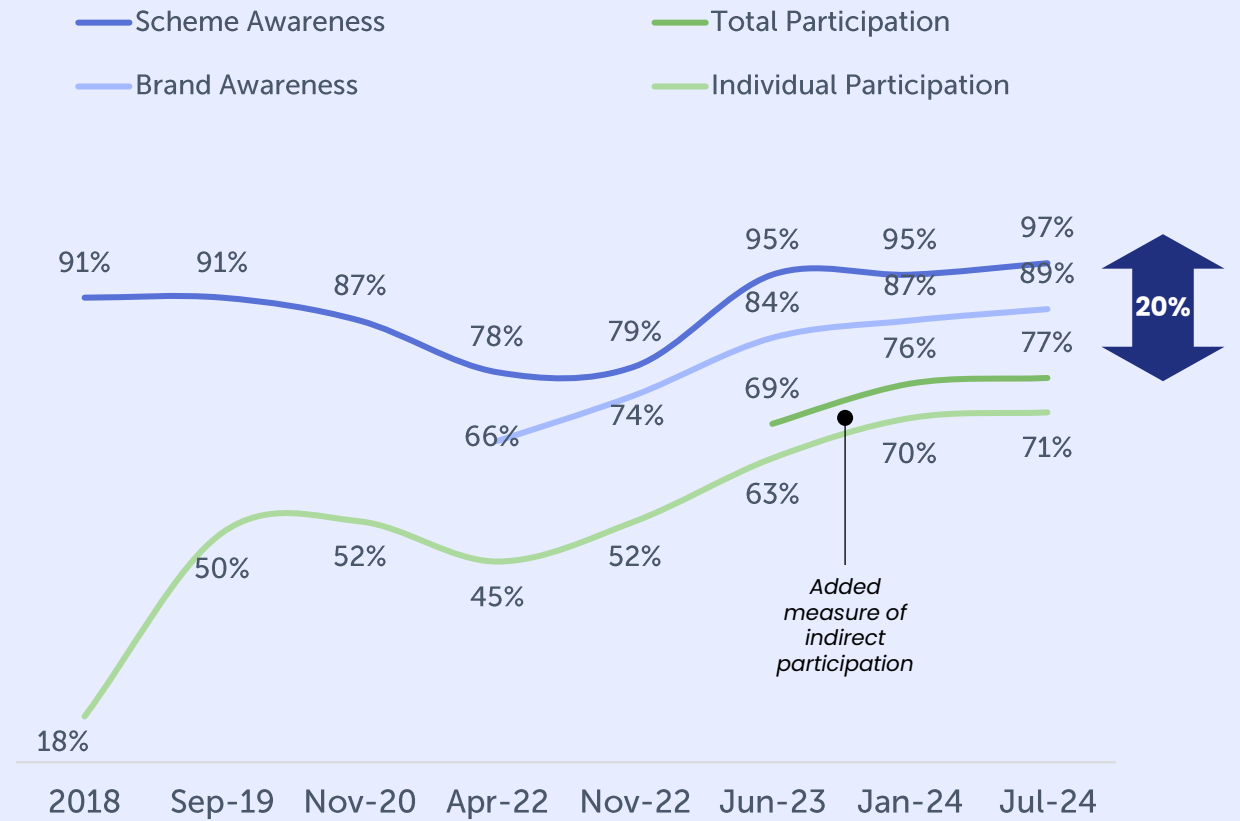
CUSTOMER-CENTRED DESIGN

Partnering with customers and stakeholders to design, trial, and build solutions.

A low-angle, upward-looking photograph of several people's hands and forearms reaching towards the center. They are holding various plastic bottles and containers, including a clear water bottle, a green bottle, and a brown bottle. The background is a solid, deep blue color. The overall mood is one of unity and shared action.

2. Latest insights

Grow volume by closing the gap.

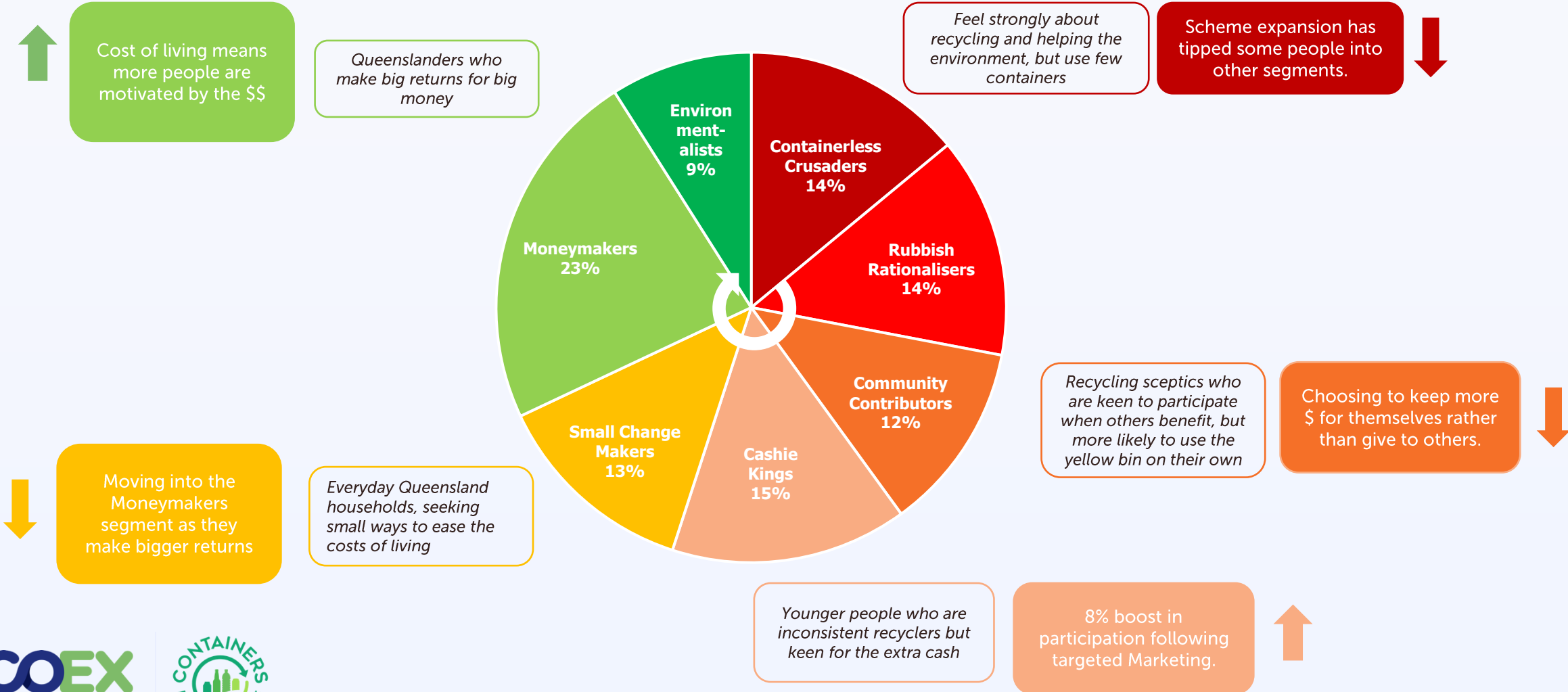


Awareness & Participation 2018 - 2024

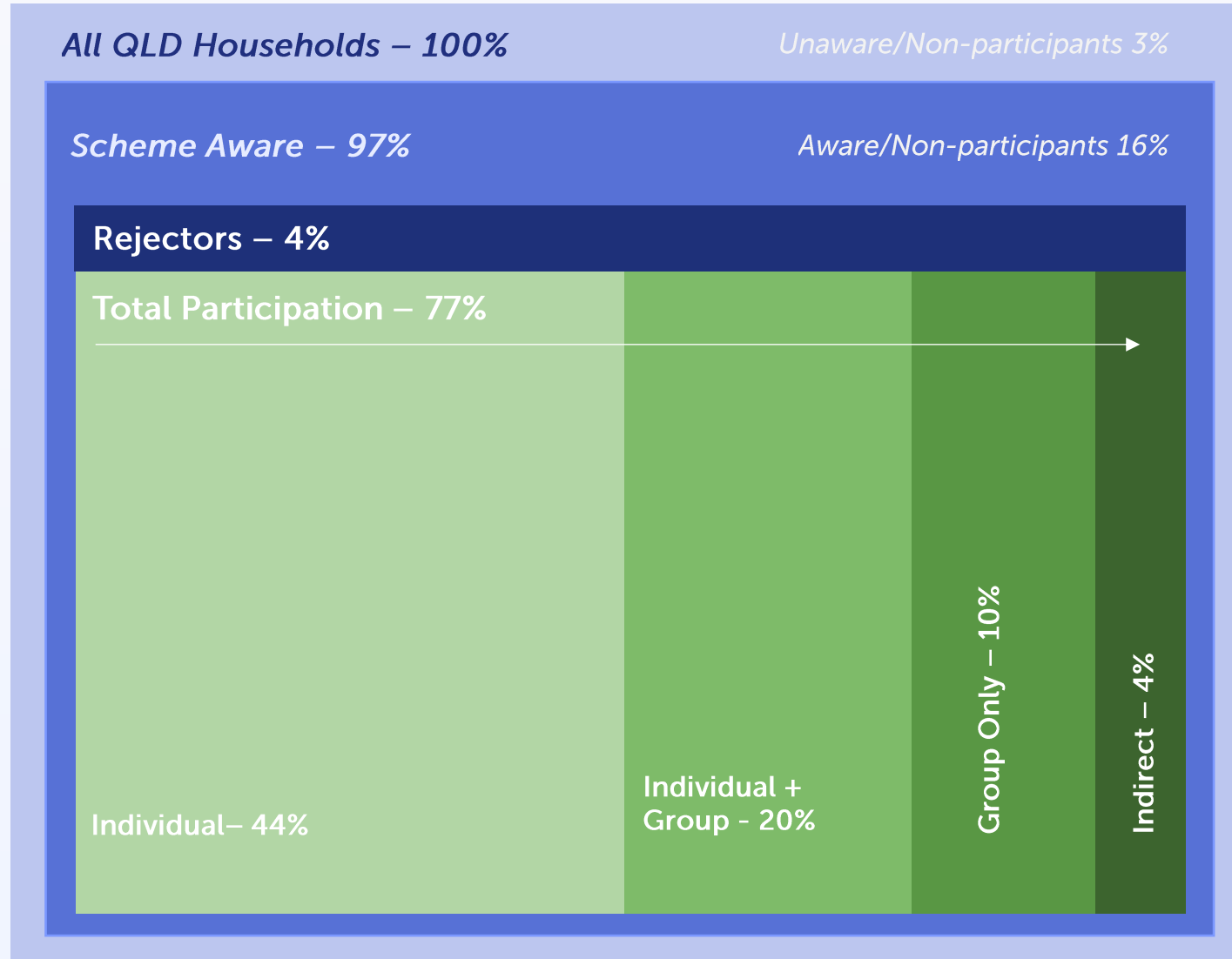


Source: COEX Brand Track via Colmar/Kantar/Veracity. Sample 2018 n=1005, Sept-19 n=1012, Nov-20 n=1009, Apr-22 n=1023, Nov-22 n=1007, Jun-23 n=2539, Jan-24 n=2529, Jul-24 n=2539. Note, new measure identify Indirect participation introduced in January 2024.

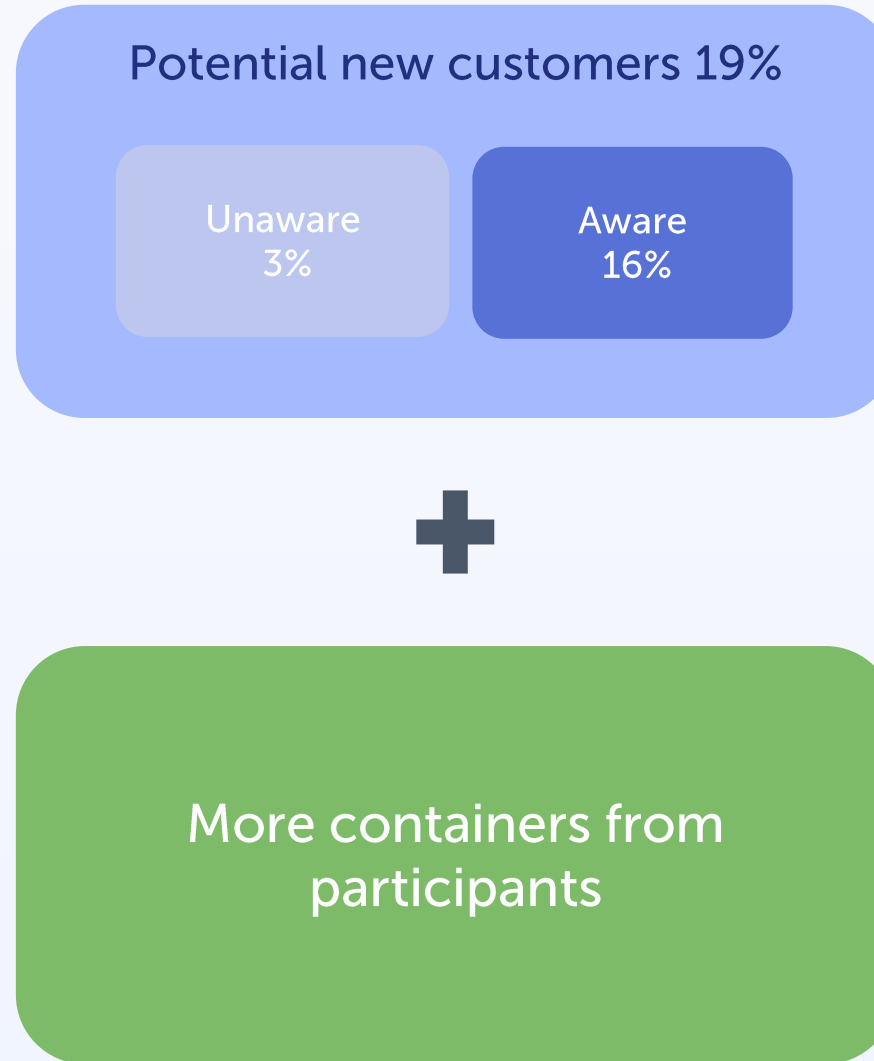
Changes in our segmentation



A deeper dive on participation



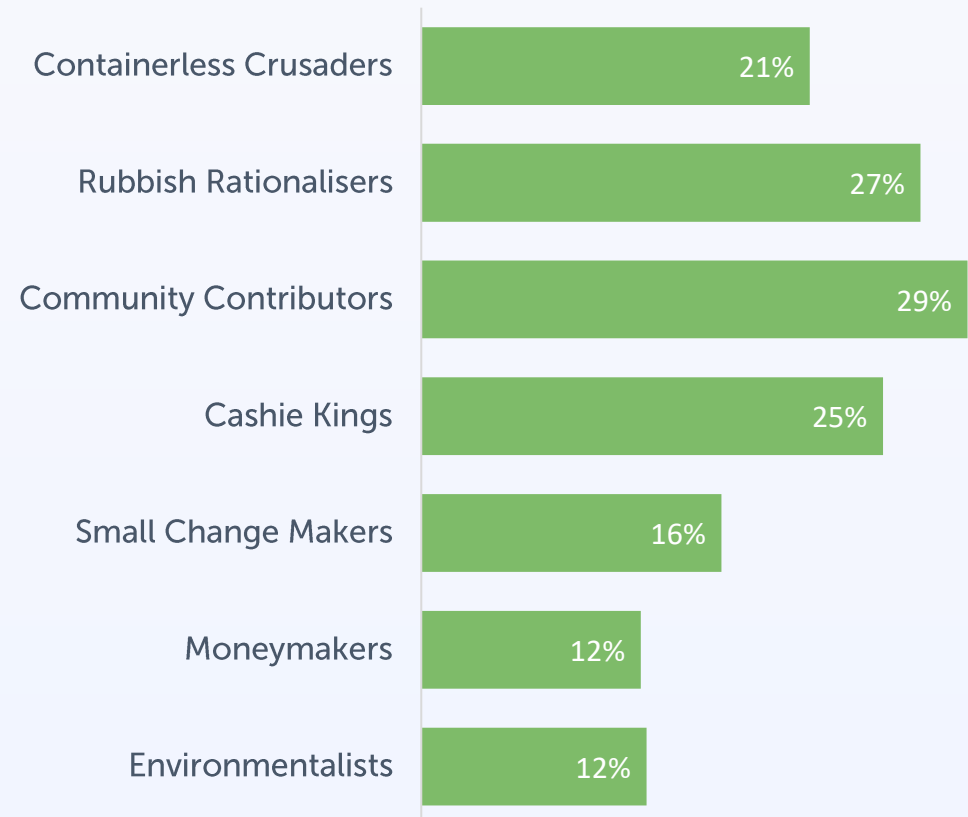
The opportunity



Some containers are going to waste.

Across all segments, people are not returning 100% of their containers.

Average Proportion of Containers into General Waste



50% of people do not know spirit bottles are accepted

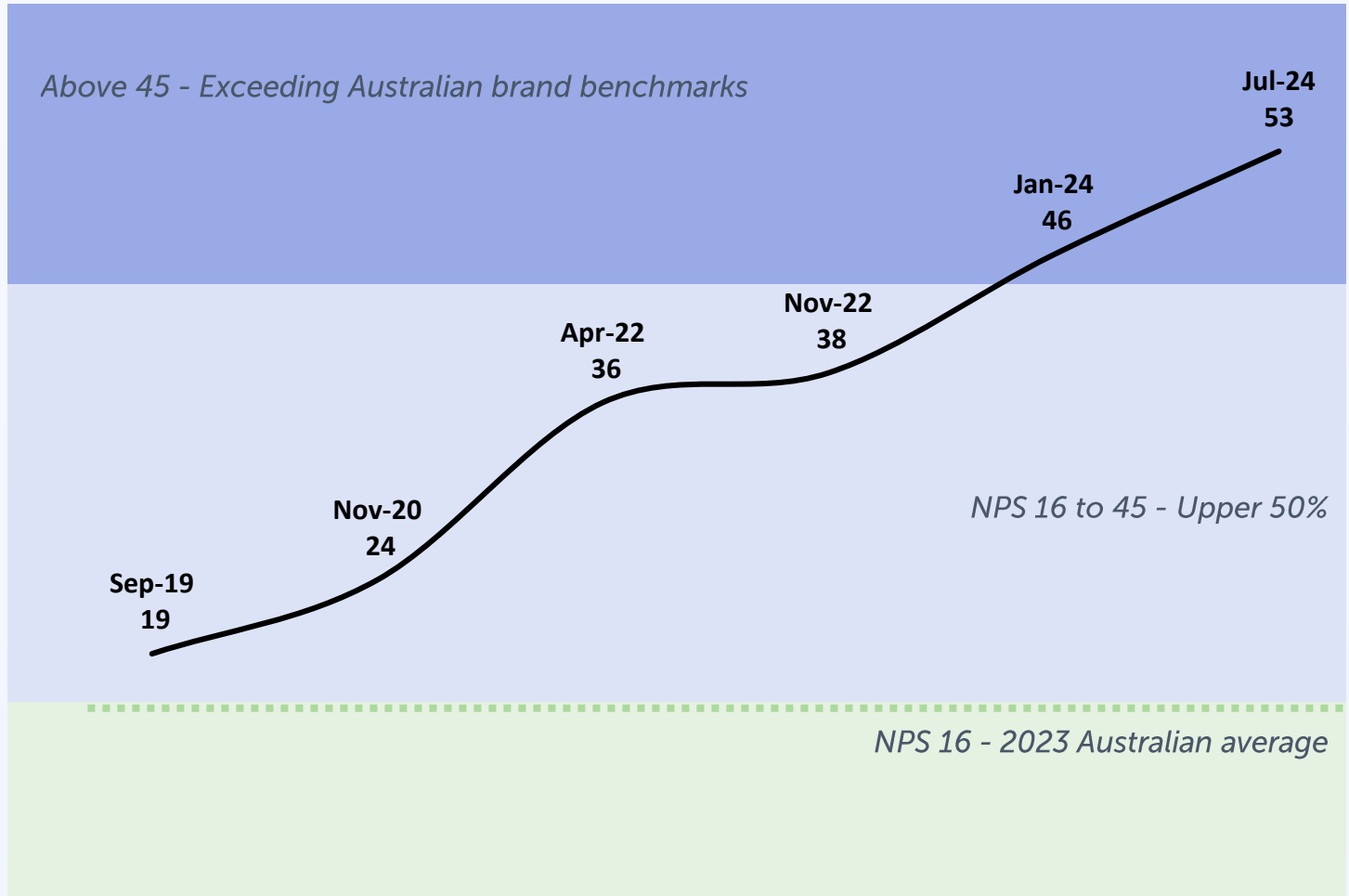
33% of people do not know wine bottles are accepted



Measuring customer loyalty

"Great service to have handy to anyone that is looking to make a few bucks on the side and very easy to do."

"It is really simple and easy to use and you get that good feeling you are doing something worth doing."



Themes for dissatisfied customers

WAIT TIMES

"They are very busy sometimes and the wait time is inconvenient"

"I don't have many containers so have to wait a long time as others have hundreds."

BROKEN OR FULL MACHINES

"Disappointed that, after the effort of collecting containers, driving around to different drop off points, label printers weren't working or bins were full."

"Ensure vending machine stations are emptied more often, as the ones on the Gold Coast are often full and rarely available during afternoons."

ACCESSIBILITY

"Because it's too far to get to. I wish they had vending machines outside the supermarket in town."

"I cannot drive and I am disabled so there is no local place that is convenient, or even possible, for me to physically haul a bunch of Rubbish."

Most common barriers



1 in 3 have no barriers!



No storage space



Not enough containers



Yellow bin habit



Perception of messy, dirty, smelly

A low-angle, upward-looking photograph of several people's arms and hands reaching towards the center. They are holding various plastic bottles and containers, including clear water bottles, a green bottle, and a brown bottle. The background is a solid, deep blue color. The text "3. Opportunities" is overlaid in the center in a white, sans-serif font.

3. Opportunities

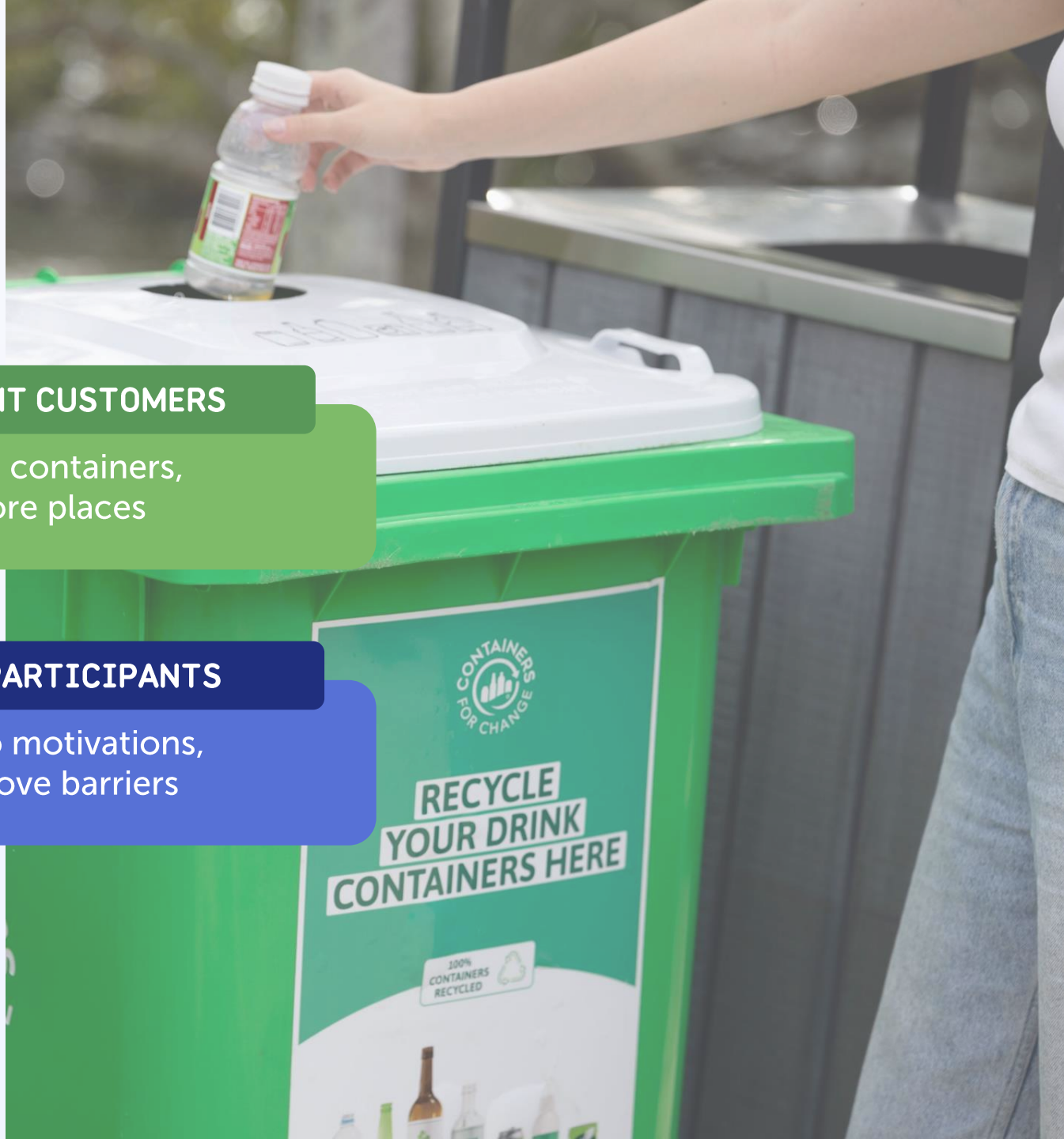
What does the participation gap mean?

CURRENT CUSTOMERS

More containers,
More places

NON-PARTICIPANTS

Talk to motivations,
Remove barriers

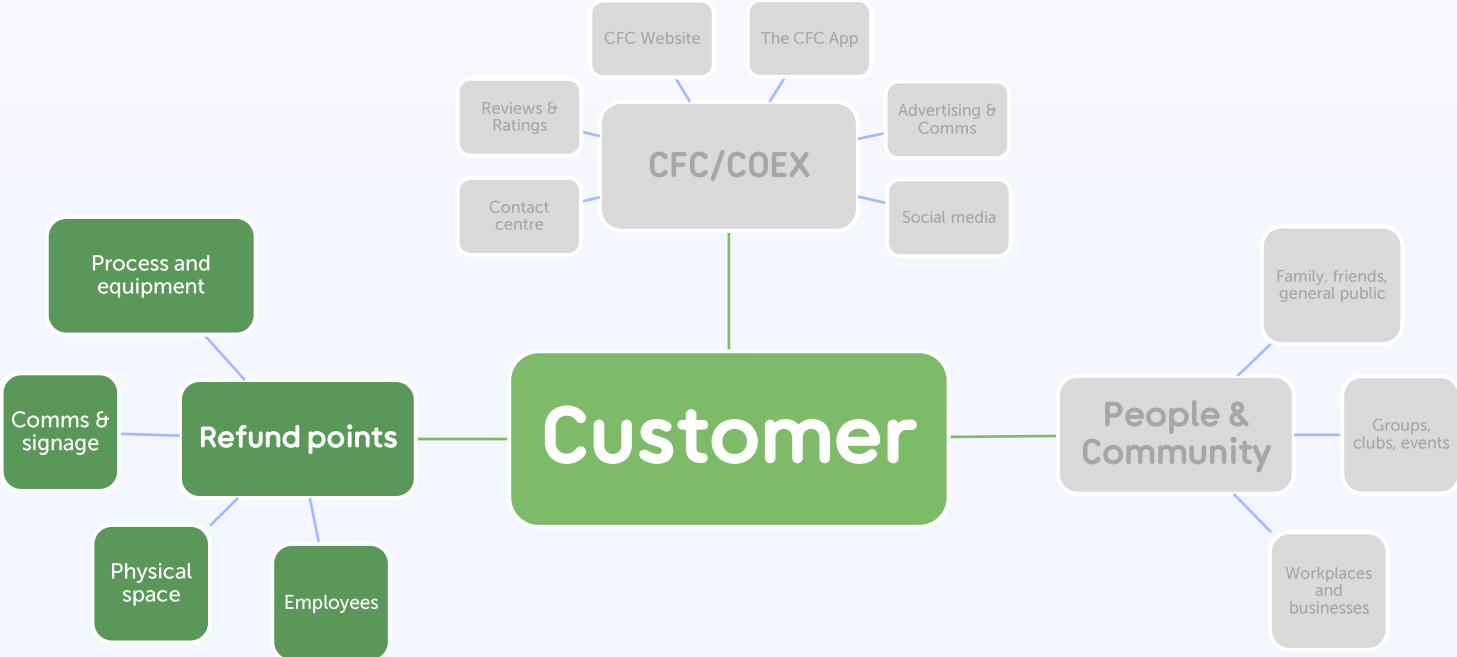




Support indirect participation in your community

(and take volume from the yellow bin!)

Assess your site with a customer hat on





**Manage
expectations
upfront for busy
periods**

Leverage our brand and assets to create consistency



Use our regional insights to map opportunities and improvements.



Connect with the CX team!



Gemma Boucher
Customer Experience
Manager



Jen Haig
Research & Insights
Lead