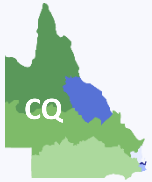
Mid-2025 Customer Survey

Operator Pack – Central QLD

COMMERCIAL IN CONFIDENCE

October 2025



Central Queensland
Key Metrics

81%

Participate at home

+7% vs 74% Queensland NET

73% collect & return

8% collect but give to others to return

26%

Participate with a group

+1% vs 25% Queensland NET

3% are responsible for the group's participation

23% give containers to the group in some way

94%

Aware of the brand

+3%vs 91% Queensland NET

94%

Would recommend the scheme

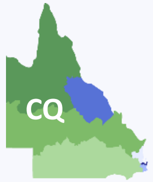
+6% vs 88% Queensland NET

Container Exchange

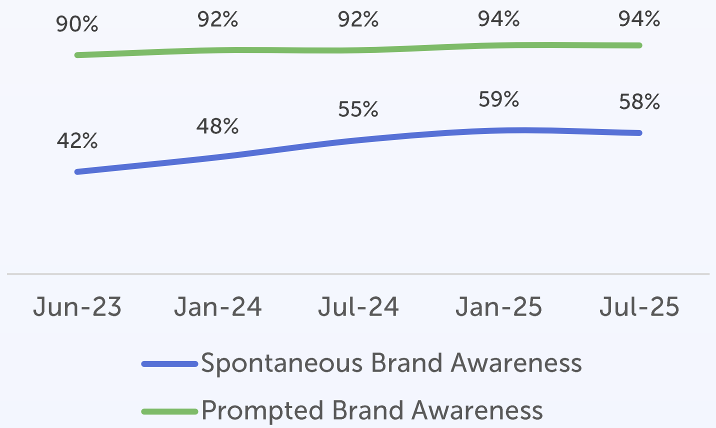
Significantly more than or less than Other Regions at 95% CI

Central Queensland
Key Metrics Longitudinal Trends

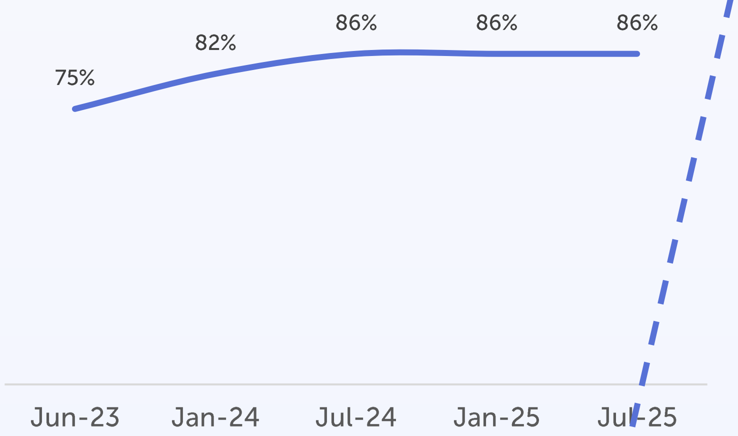
Central QLD customers gave **higher Net Promoter Score (NPS)** and **Customer Satisfaction Score** (CSAT) than QLD Net. **Group participation fell** this wave in line with other regions but was largely offset by more people participating *'At Home Only'*, keeping total participation steady.



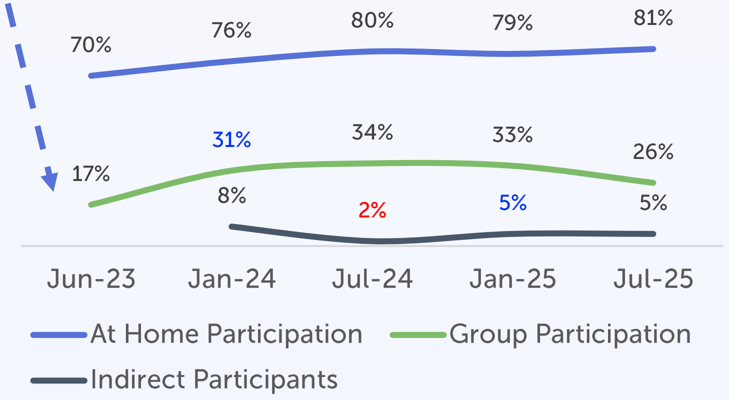
Awareness



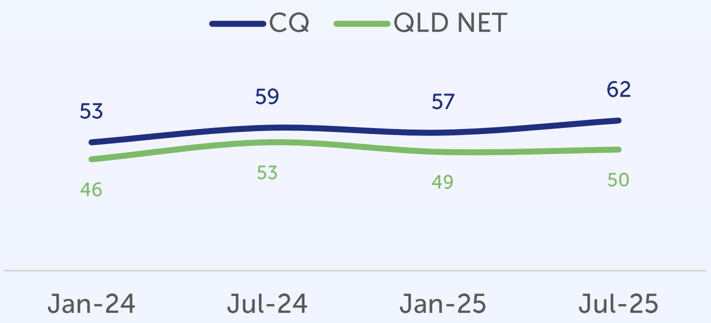
Total Participation



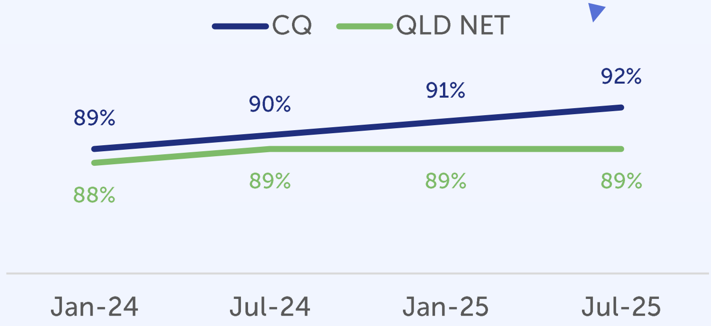
Participation Types



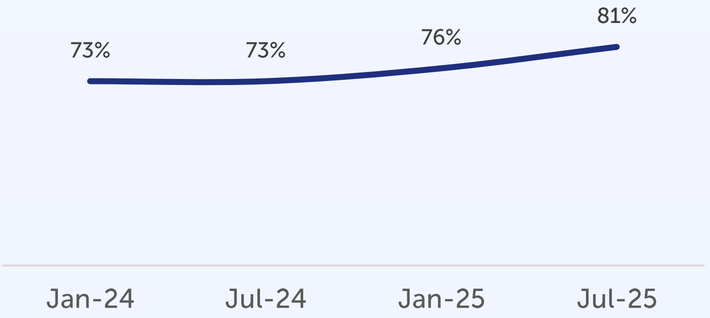
NPS



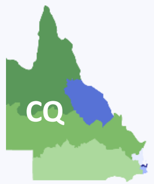
CSAT



Trust



Significantly more than or less than previous wave at 95% CI



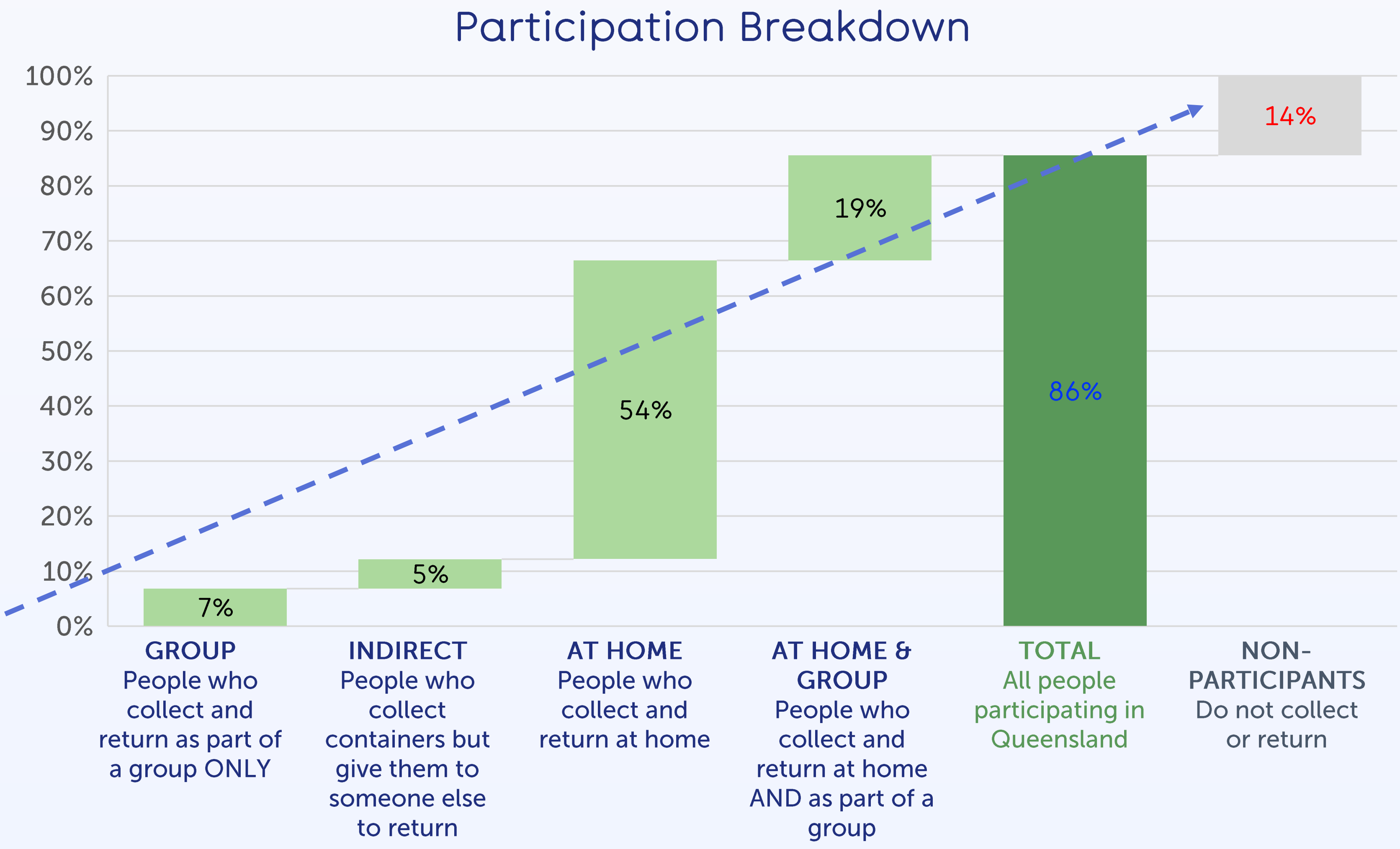
Central Queensland Participation Breakdown

Central QLD participation: Central QLD has the highest rate of participation of any region (tied with North QLD), and 7pp above the Queensland Net.

More people are participating *At Home Only* this wave, and less people are participating in groups like workplaces, sporting clubs or schools.

Indirect participation (e.g. giving containers to someone else) has stayed stable this year.

Opportunity size: ~12% of customers are either unaware of the scheme or open to participating but haven't yet. Within Central QLD, only 2% are firm rejectors.

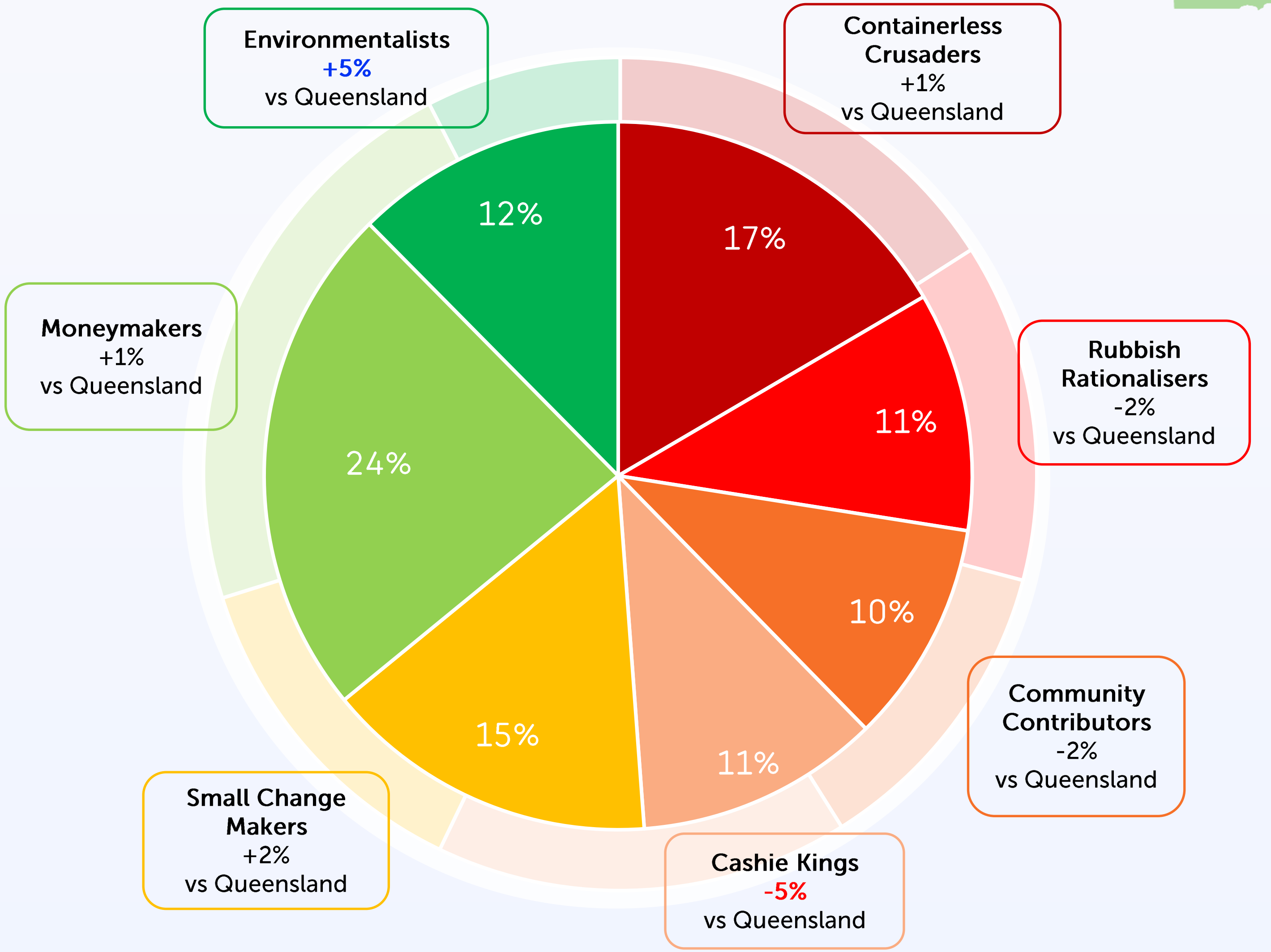


Significantly more than or less than Other Regions at 95% CI

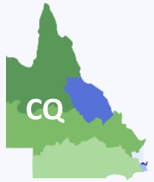
Central Queensland Customer Segments

Central QLD has a stronger base of engaged customers, with **51%** falling into our most engaged segments — *Moneymakers, Environmentalists*, and *Small Change Makers*. Compared to 43% statewide, this reflects stronger participation and fewer less-engaged customers in the region.

In addition, 36% of customers face no barriers to participation, a significantly higher proportion than elsewhere in the state.



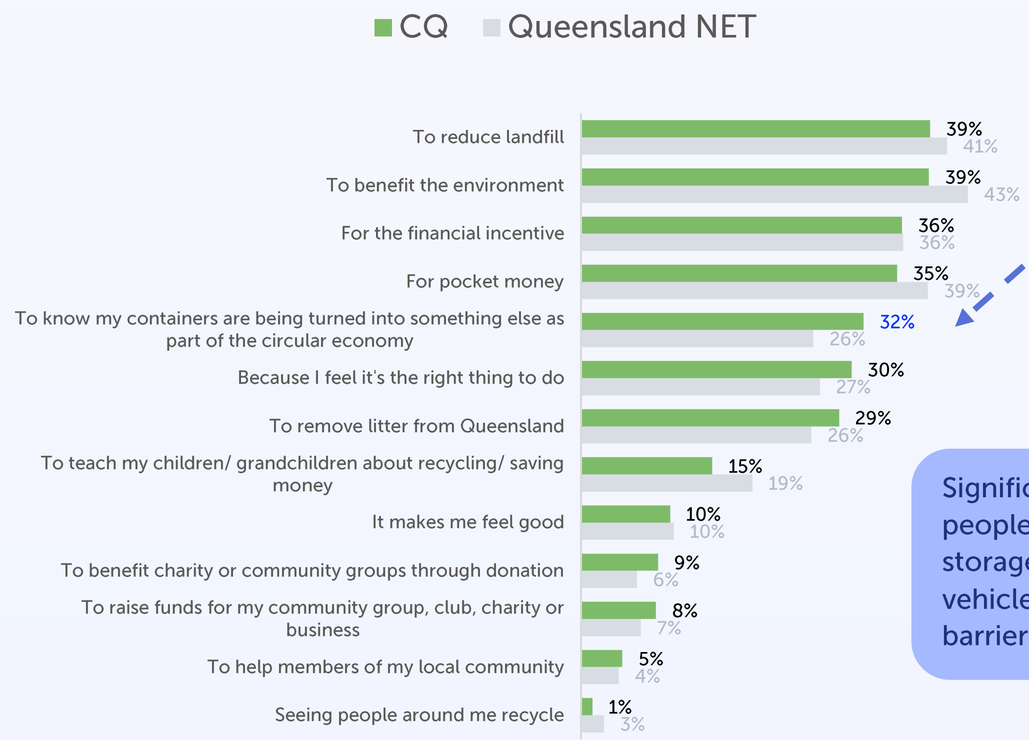
Significantly more than or less than Other Regions at 95% CI



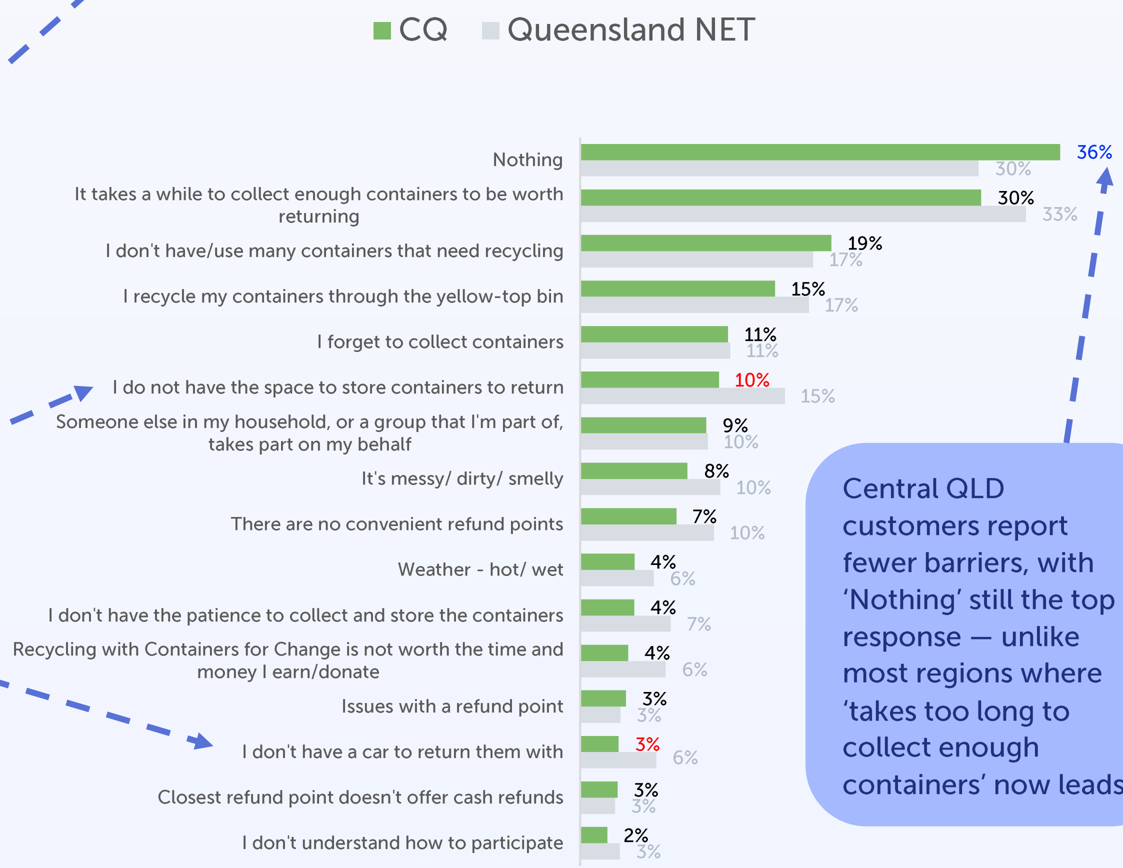
Central Queensland
Why do/ don't people participate?

3 of the top 5 motivations in Central QLD are environmental, with **circularity** specifically stronger here than other regions. Financial drivers remain significant, though slightly below the state average.

Motivations



Barriers



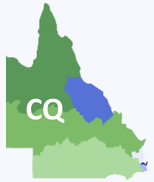
Significantly less people report storage space or vehicle access as barriers.

Central QLD customers report fewer barriers, with 'Nothing' still the top response — unlike most regions where 'takes too long to collect enough containers' now leads.

Container Exchange

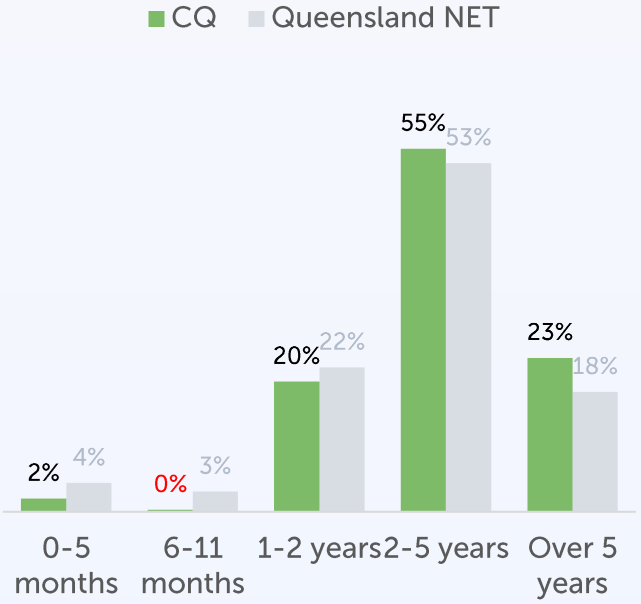
Significantly more than or less than Other Regions at 95% CI

Central Queensland
How is the experience?



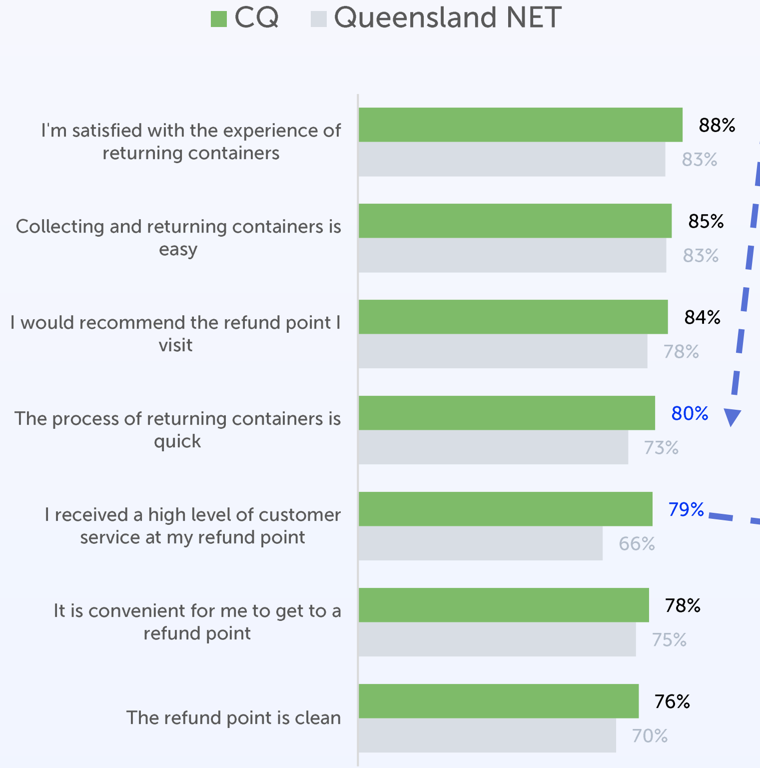
Central QLD leads on speed and service. Customers are finding the return process quick, with a significant jump this wave, while strong customer service continues to outperform the state average.

Tenure



High participation means fewer recent joiners, with most customers engaged for over a year.

Experience

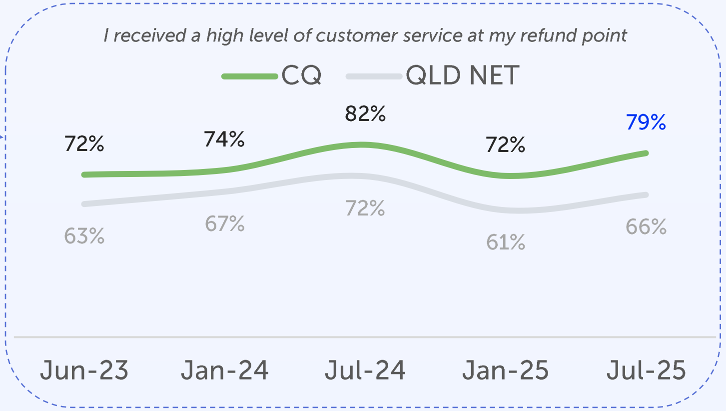


Feedback

"It's a great venture that just requires a bit more exposure"

"Their depots are great...not sure what else you could do to improve...maybe more chutes? - My drop off centre is about 35mins drive away...though I combine trips, I would probably go more often if a secure and well maintained vending machine was installed at my local service station."

"Just drive in and drop off without much of a wait"

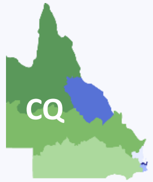


Container Exchange

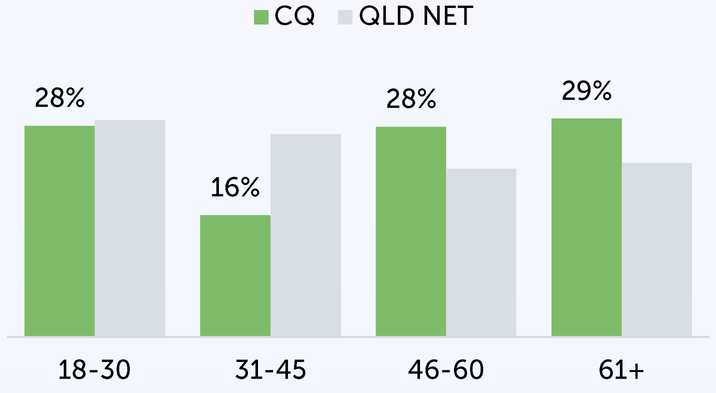
Significantly more than or less than Jan 25 Other Regions at 95% CI

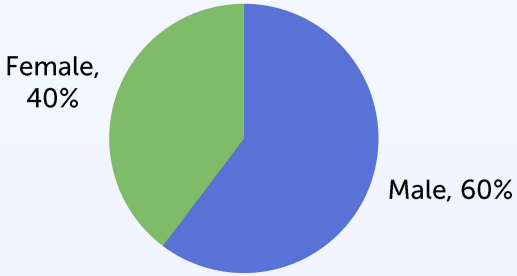
Central Queensland
Not yet participating, but open to it

Potential new customers are mostly held back by the **convenience of the yellow bin**. They're **more** likely than other regions to see *'closest refund point not offering cash'* as a barrier and **less** likely to be *Cashie Kings* motivated by financial incentives but returning irregularly.

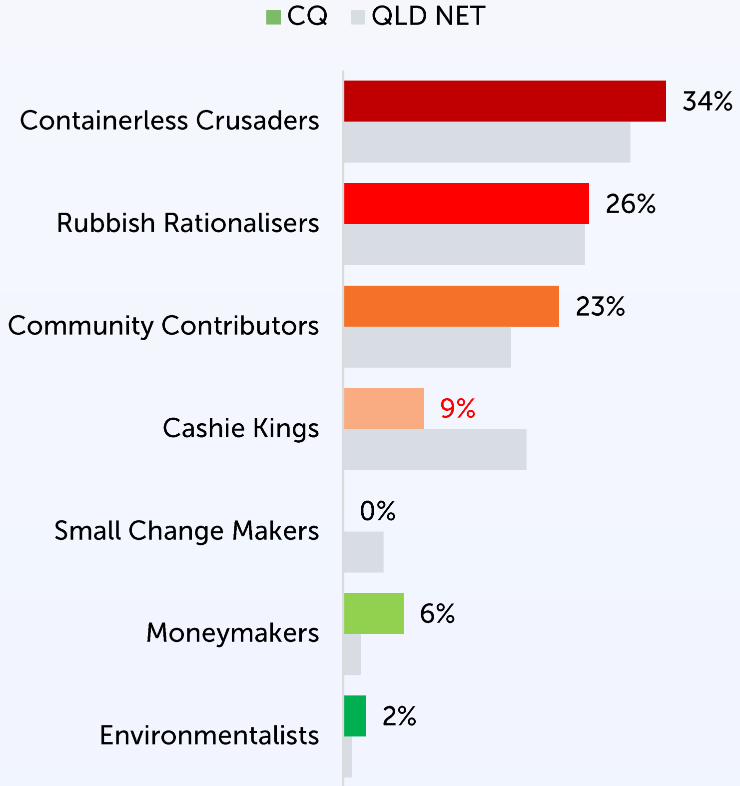


Age & Gender

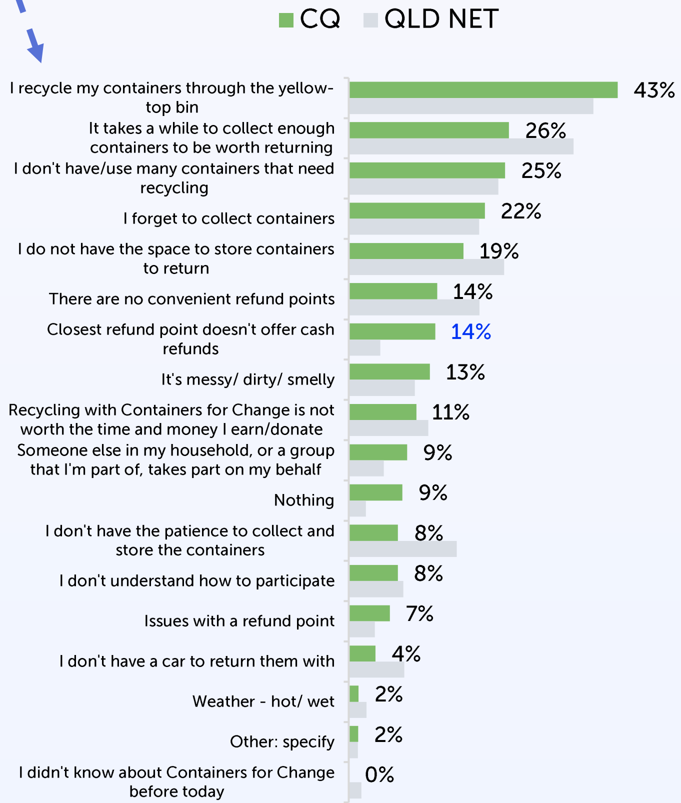




Segment



Barriers

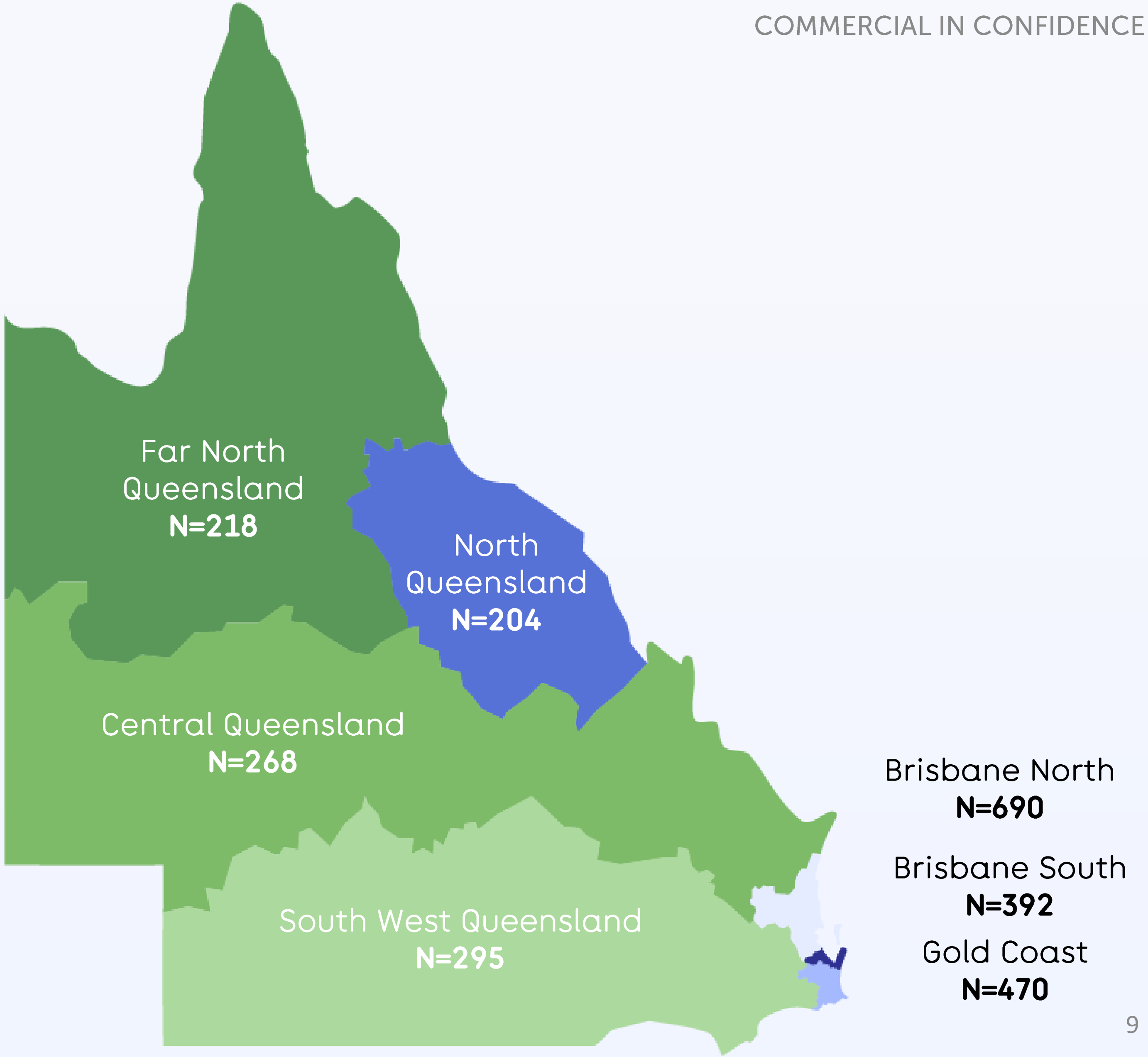


Significantly more than or less than Jan 25 Other Regions at 95% CI

About the research

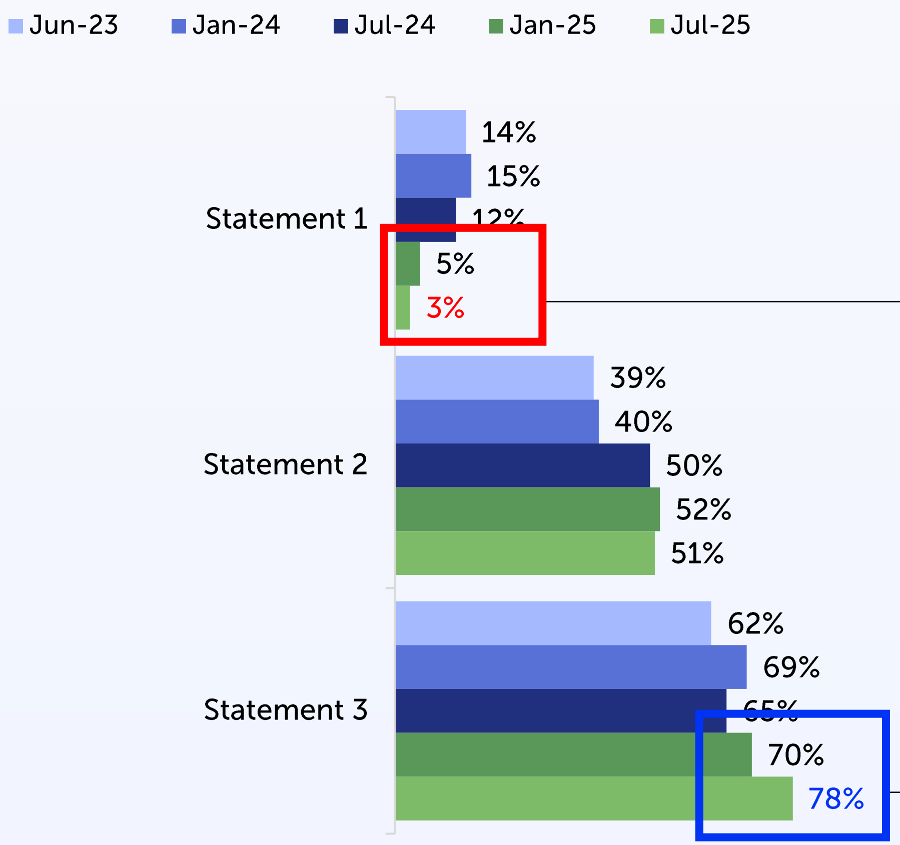
From 16th July to 11th August 2025, we surveyed 2,537 Queenslanders aged 18 and above to explore their views on recycling and Containers for Change.

We achieved a robust sample across region, gender, age group, weekly container consumption, household types and income levels.



COEX Container Exchange
CONTAINERS FOR CHANGE

Understanding statistically significant differences



Red or ▼ = **Significantly less**

In this case, significantly <u>less</u> people agree with Statement 1 in Jul-25 as compared to Jan-25.

Blue or ▲ = **Significantly more**

In this example, significantly <u>more</u> people agree with Statement 3 in Jul-25 as compared to Jan-25.

Got further questions?

Connect with the CX team!

Gemma Boucher

Customer Experience Manager

Jennifer Haig

Research & Insights Lead

COEX
Container Exchange

CONTAINERS FOR CHANGE