



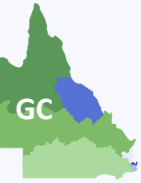
Mid-2025 Customer Survey

Operator Pack – Gold Coast

COMMERCIAL IN CONFIDENCE

October 2025

Gold Coast Key Metrics



74%

Participate at
home

±0% vs 74%
Queensland NET

67% collect & return

6% collect but give to others
to return

19%

Participate
with a group

-6% vs 25%
Queensland NET

5% are responsible for the
group's participation

14% give containers to the
group in some way

90%

Aware of the
brand

-1%vs 91%
Queensland NET

88%

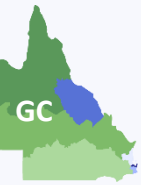
Would
recommend
the scheme

±0% vs 88%
Queensland NET



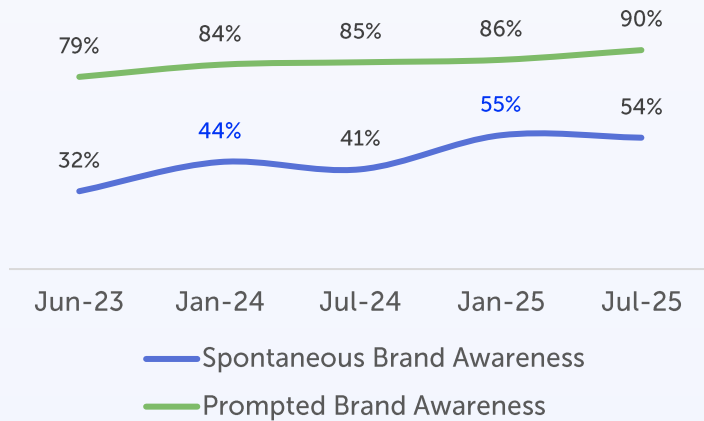
Gold Coast

Key Metrics Longitudinal Trends

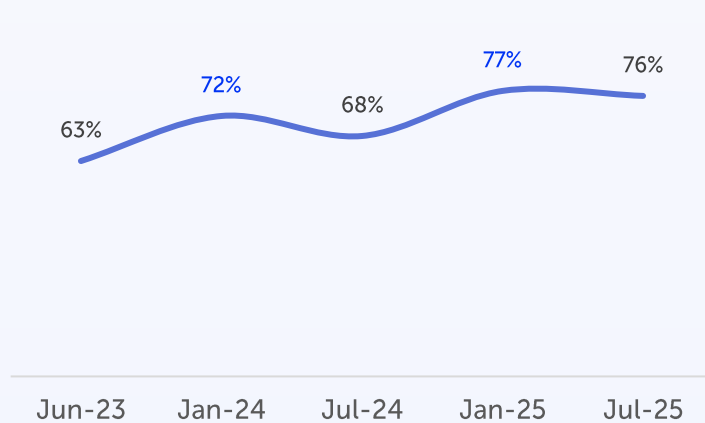


Lower trust compared with other regions this wave, and to GC results from Jan. This looks to be due to more 'neutral' responses, rather than an increase in 'distrust'.

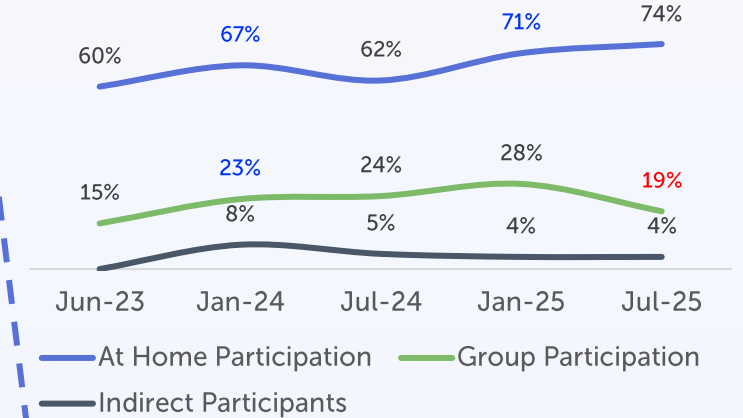
Awareness



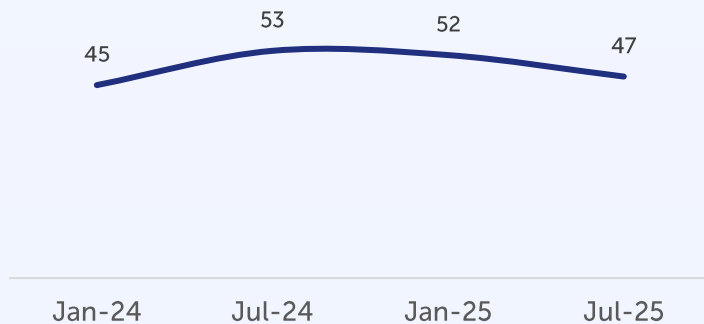
Total Participation



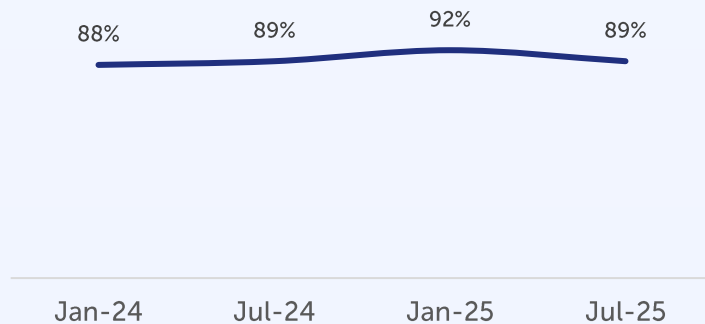
Participation Types



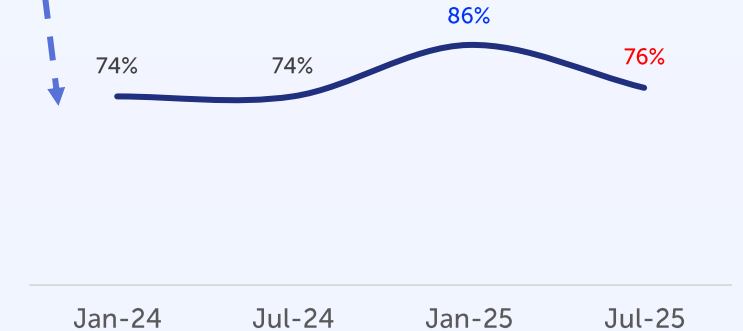
NPS



CSAT



Trust

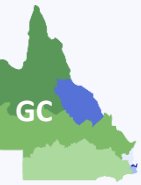


Gold Coast Participation Breakdown

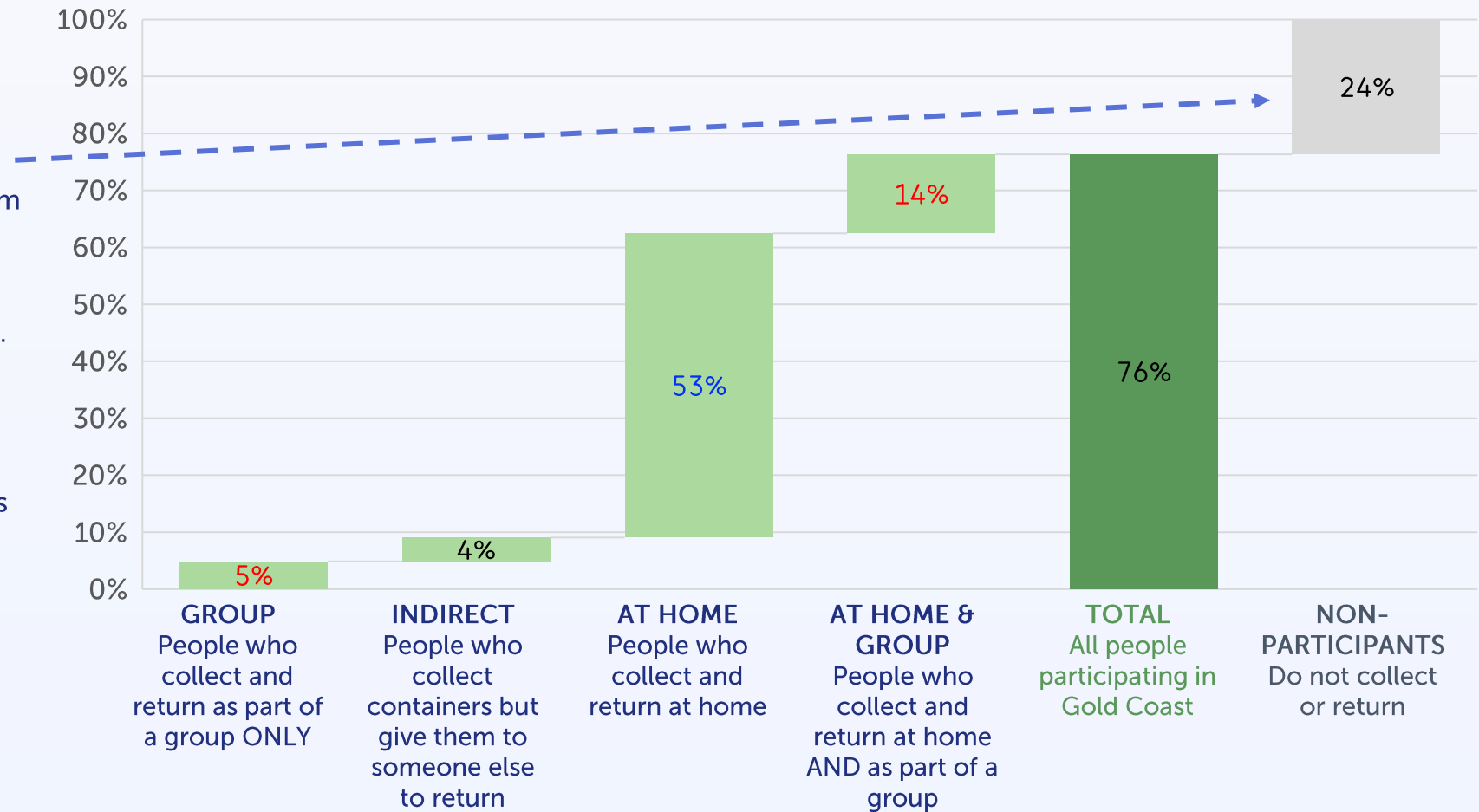
Opportunity size: ~21% of respondents are either unaware of the scheme or open to participating but haven't yet. Only 3% are firm rejectors.

Group participation is lower than other regions and has declined ~9% since January. However, this is offset by an ~8% rise in At Home Only participation, keeping overall engagement relatively stable.

Indirect participation (e.g. giving containers to someone else): remains steady.



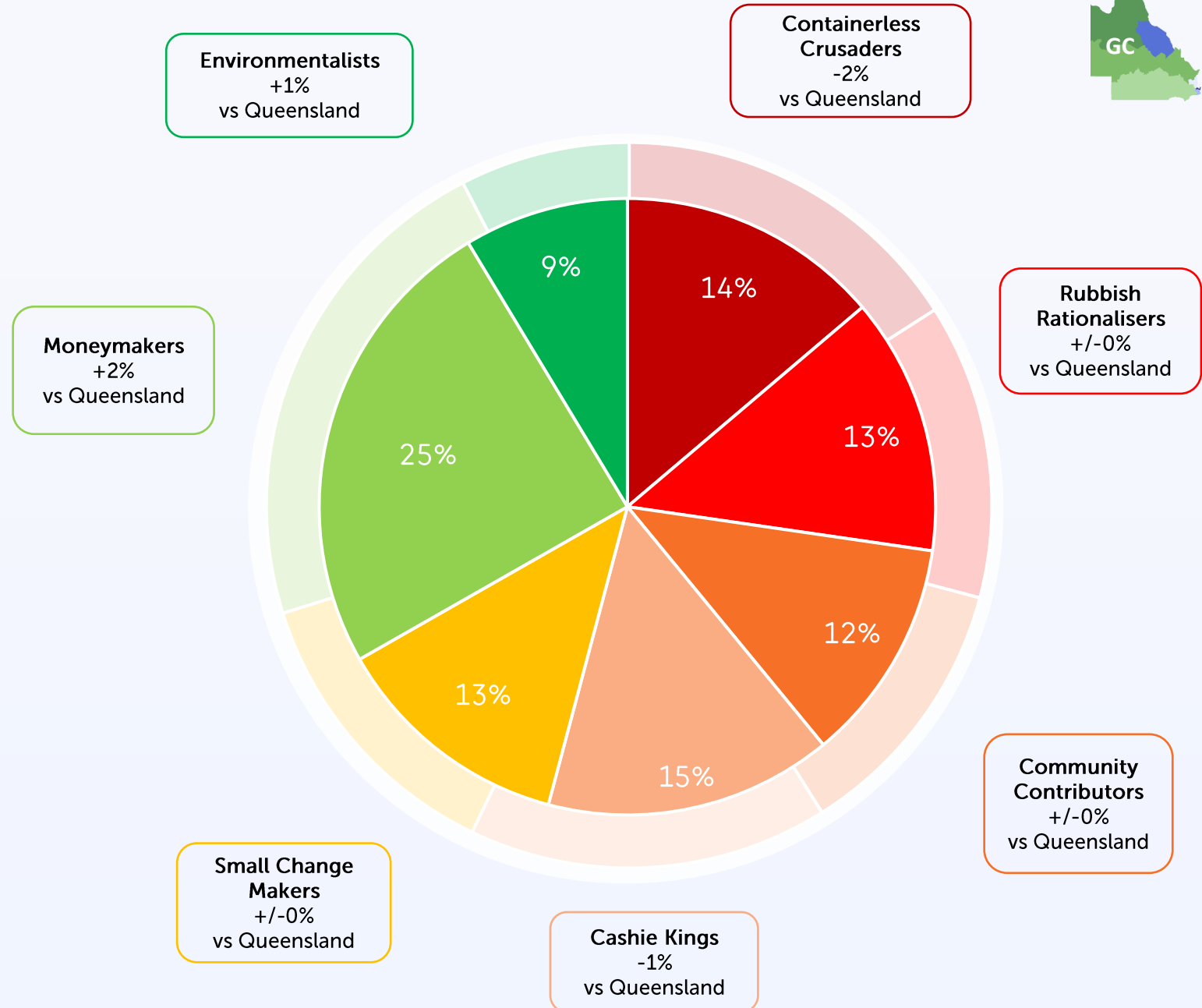
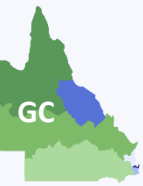
Participation Breakdown



Gold Coast Customer Segments

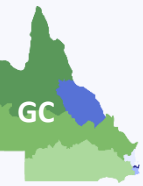
Gold Coast customer motivations and barriers align broadly with rest of state.

Around 1 in 3 have no barriers to participating (*Environmentalist* and *Money Makers*)



Gold Coast

Why do/ don't people participate?



Motivations

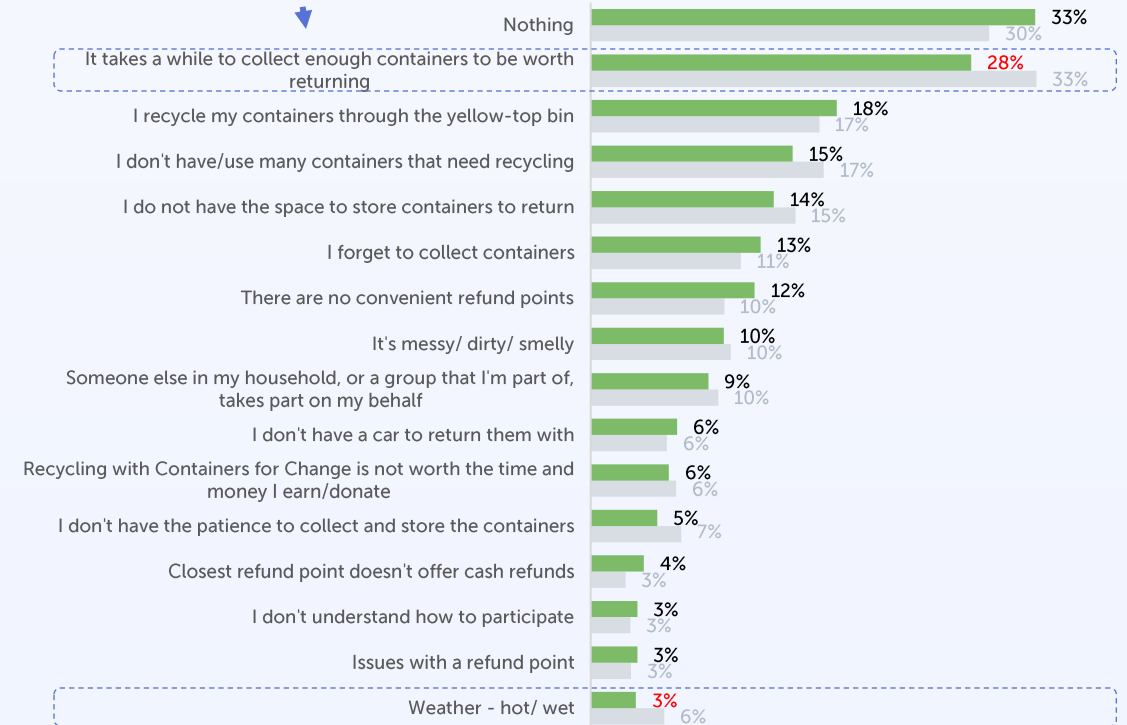
■ GC ■ Queensland NET



Unlike the rest of Queensland, Gold Coast customers are less likely to view the time it takes to collect enough containers or hot or wet weather as a deterrent.

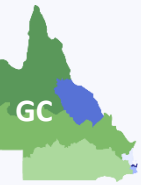
Barriers

■ GC ■ Queensland NET



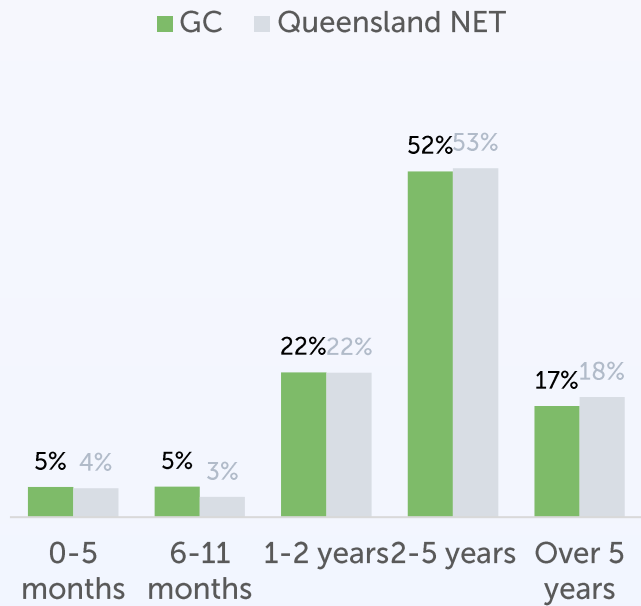
Gold Coast

How is the experience?

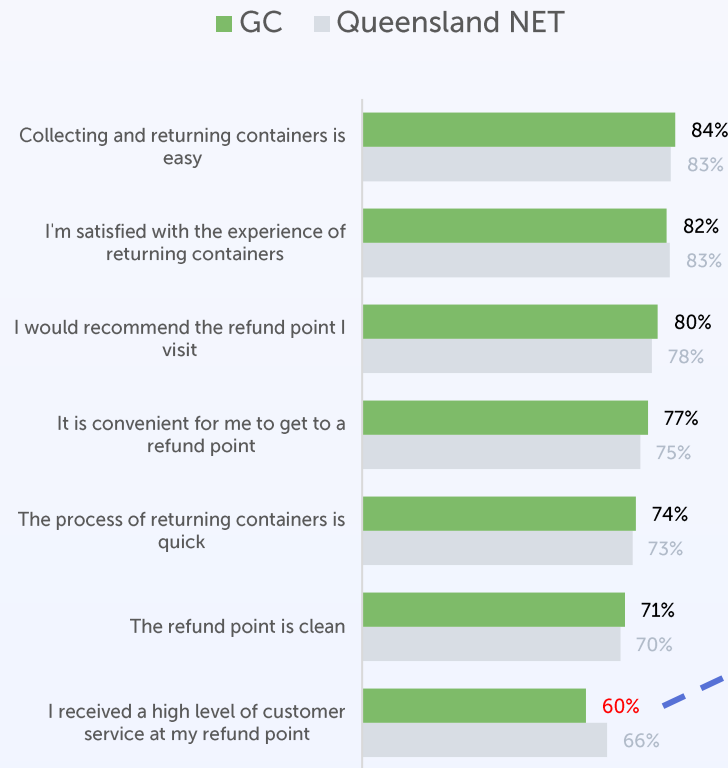


GC customers were significantly less likely to agree with that they'd received a high-level of customer service at their refund point when compared to other regions.

Tenure



Experience



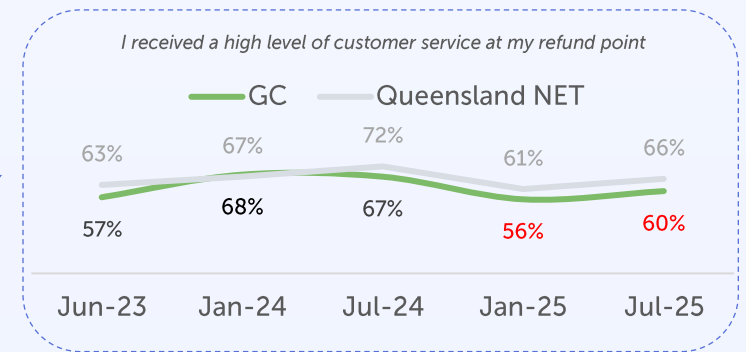
Feedback

"They are doing great, I think maybe more awareness of nearest collection spots for people unaware"

"It's pretty easy to be honest"

"Not many drop off points but great cause and company still"

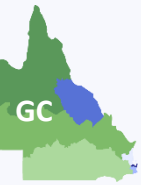
"Always efficient polite on time. Never had a problem"



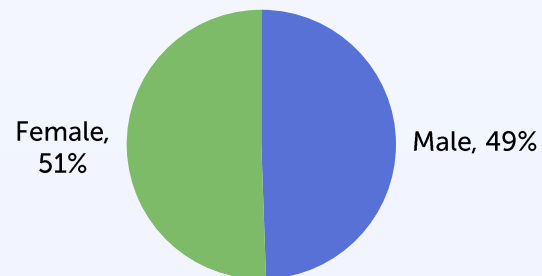
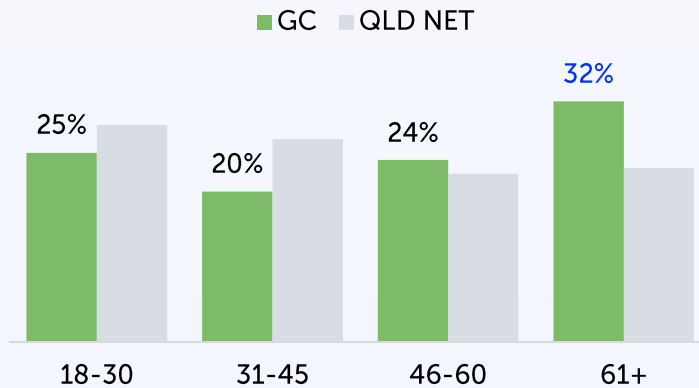
Gold Coast

Not yet participating, but open to it

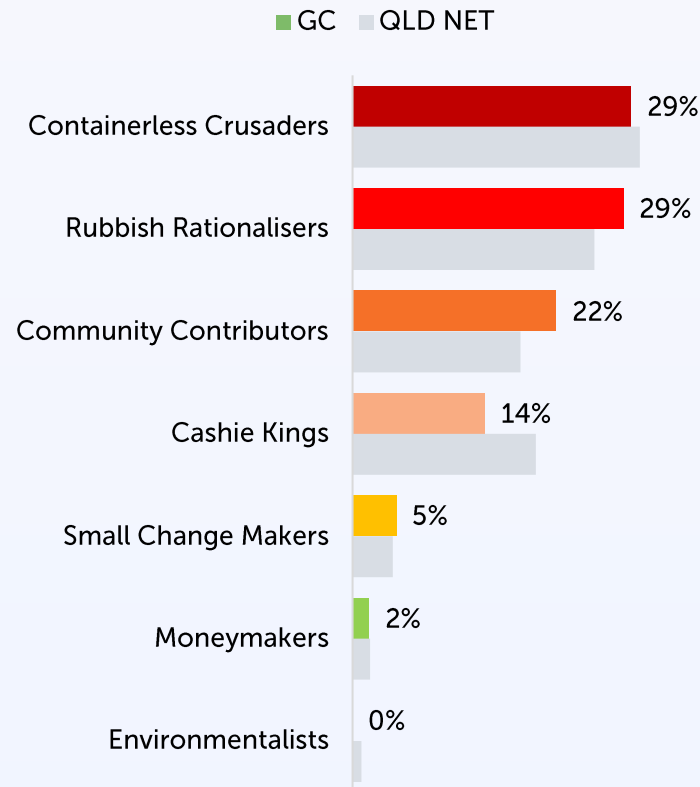
Potential customers are slightly more likely to be over 61 and less likely to see 'having the patience to collect and store containers' as a barrier. Their main barriers are the presence of a yellow bin and the time it takes to return containers.



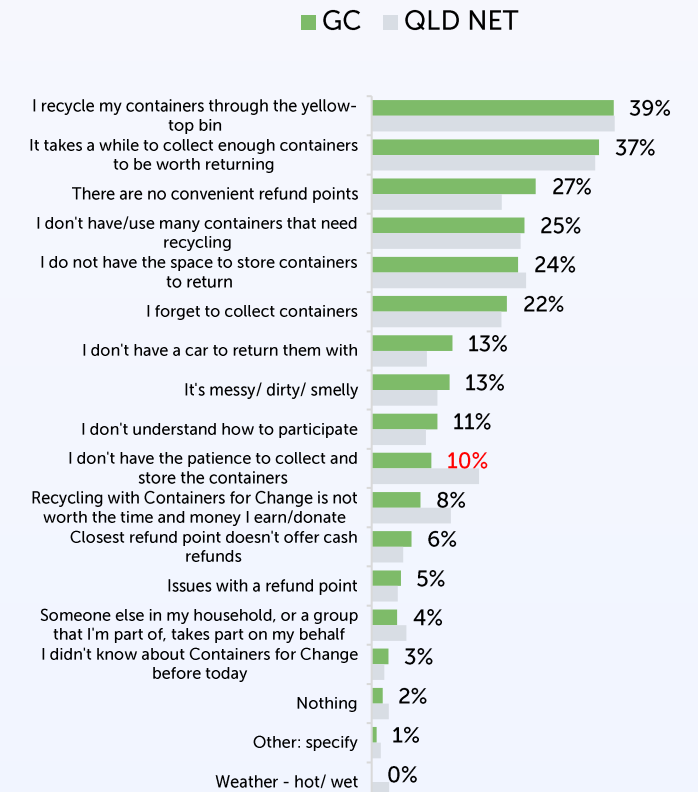
Age & Gender



Segment



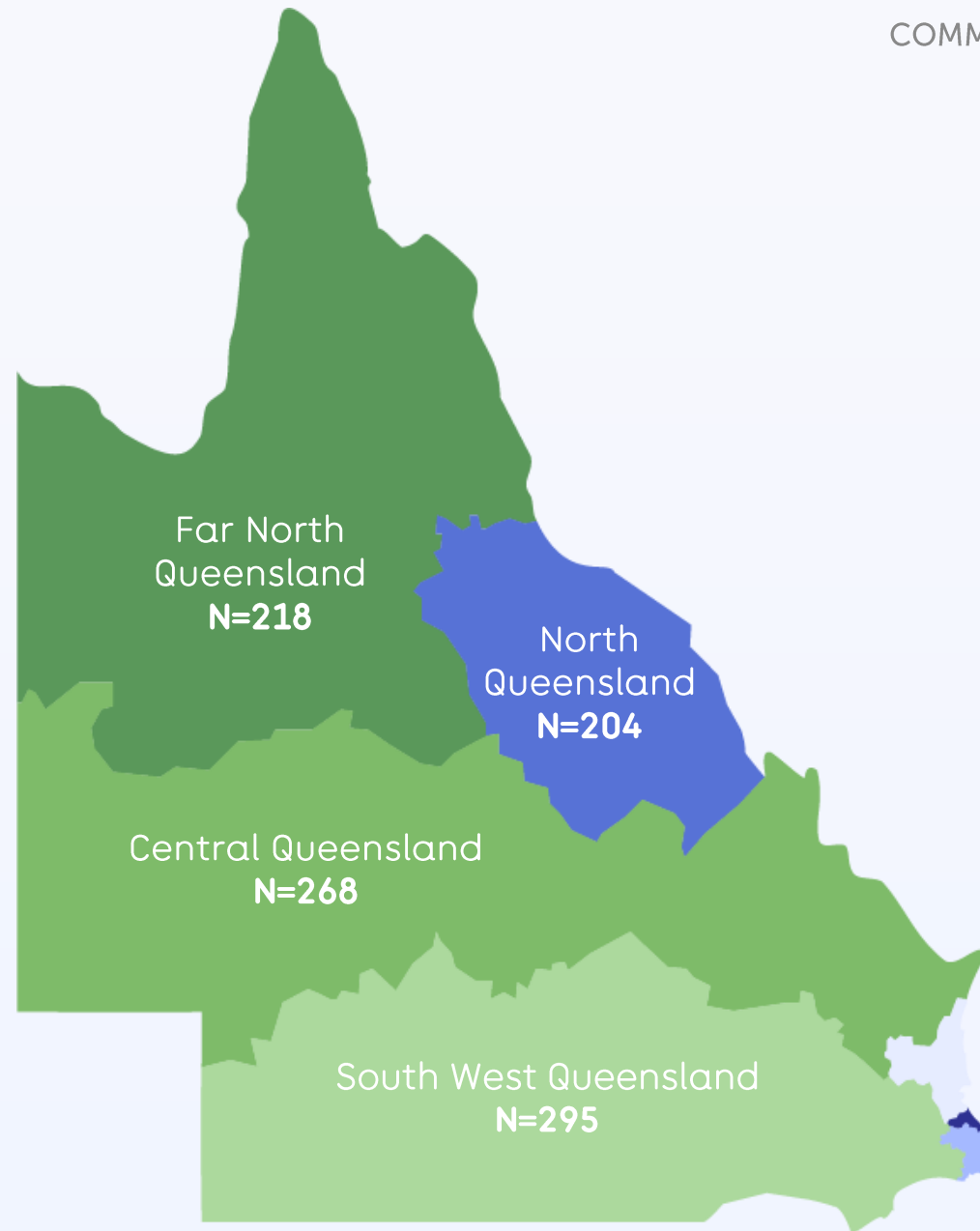
Barriers



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.



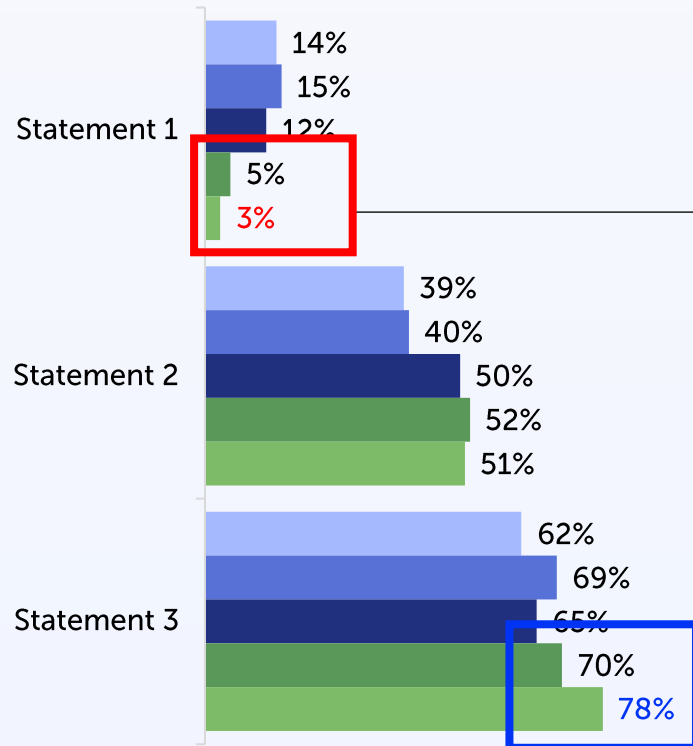
Brisbane North
N=690

Brisbane South
N=392

Gold Coast
N=470

Understanding statistically significant differences

Jun-23 Jan-24 Jul-24 Jan-25 Jul-25



Red or ▼ = Significantly less

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

Blue or ▲ = Significantly more

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

**Got further
questions?**

**Connect with the
CX team!**



Gemma Boucher

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Manager**



Jennifer Haig

**Research & Insights
Lead**

