



# Mid-2025 Customer Survey

## Operator Pack –North QLD

COMMERCIAL IN CONFIDENCE

October 2025

# North Queensland Key Metrics



79%

Participate at  
home

+5% vs 74%  
Queensland NET

73% collect & return

6% collect but give to others  
to return

34%

Participate  
with a group

+9% vs 25%  
Queensland NET

3% are responsible for the  
group's participation

31% give containers to the  
group in some way

87%

Aware of the  
brand

-4% vs 91%  
Queensland NET

91%

Would  
recommend  
the scheme

+3% vs 88%  
Queensland NET



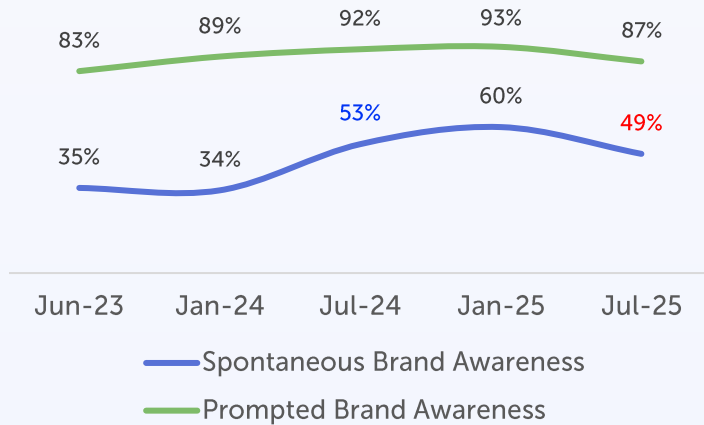
# North Queensland

## Key Metrics Longitudinal Trends

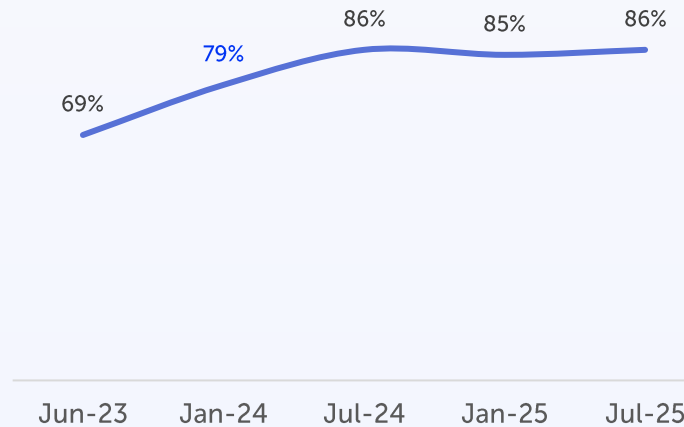
North QLD customers gave slightly higher Net Promoter Score (NPS) and Customer Satisfaction Score (CSAT), continuing a trend. Due to an increase in 'neutral' responses, trust has dropped this wave. It should be noted that trust is still very high, and there hasn't been any increase in 'distrust' responses from participants.



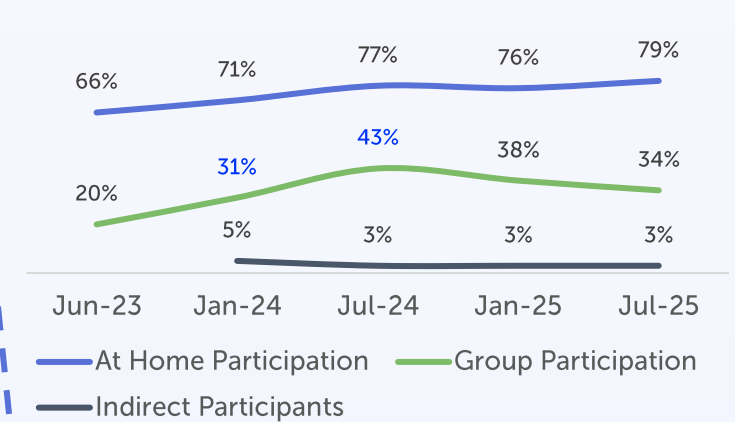
### Awareness



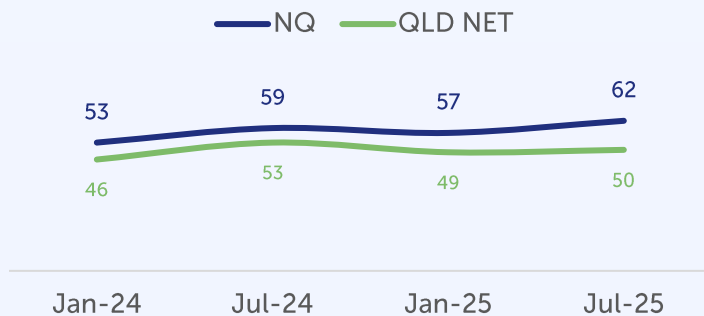
### Total Participation



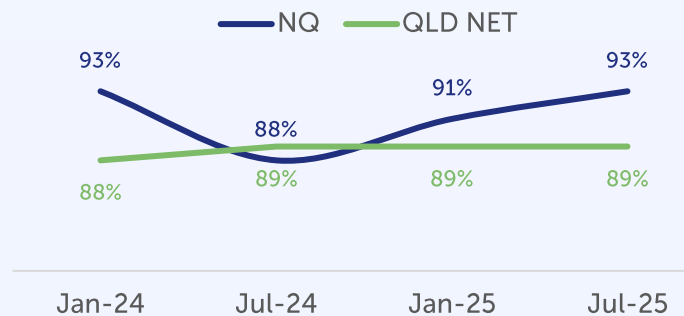
### Participation Types



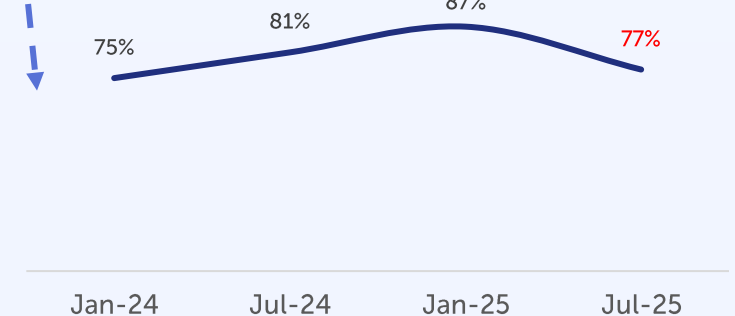
### NPS



### CSAT



### Trust



# North Queensland Participation Breakdown

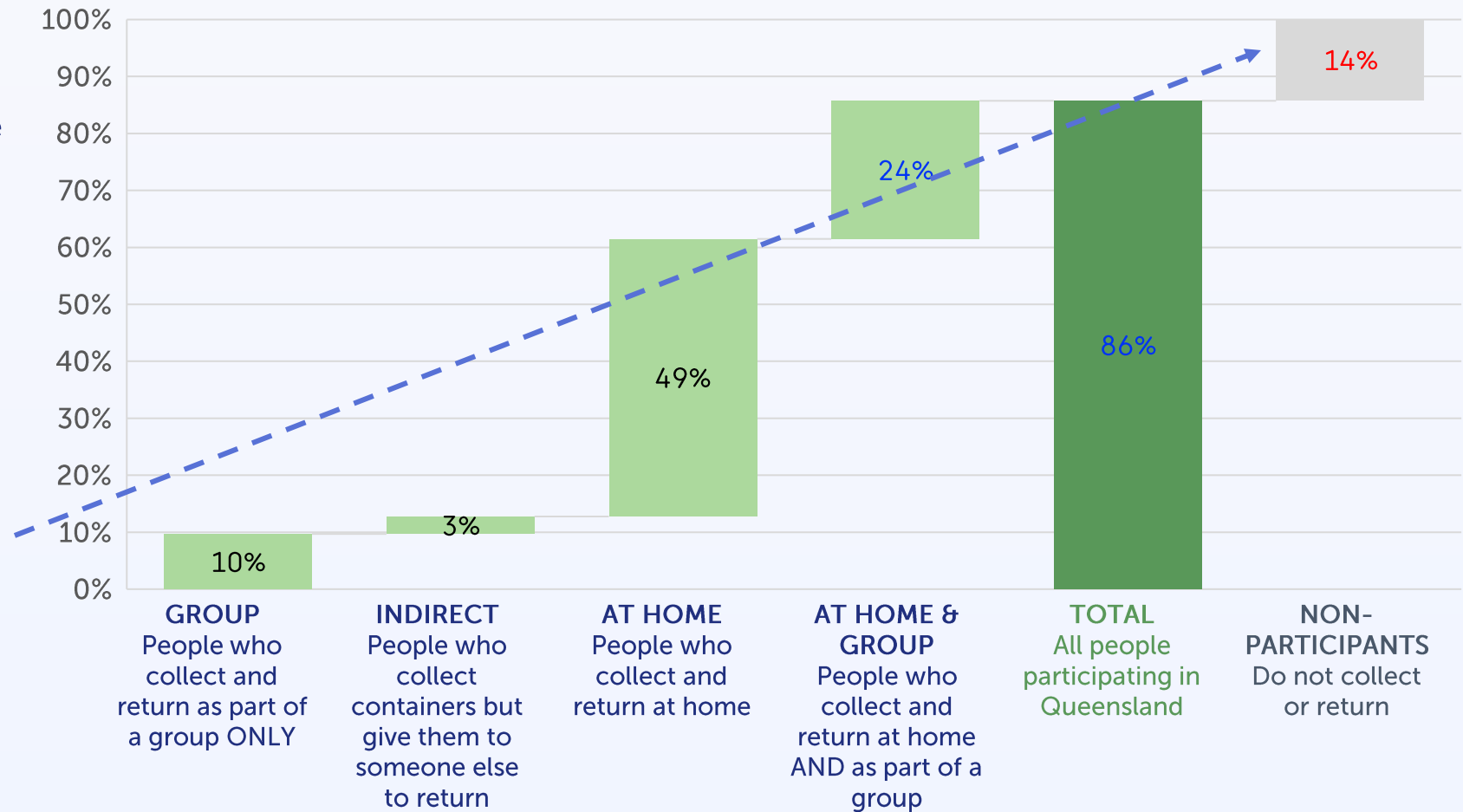


**North QLD Participation:** North QLD has the highest rate of participation of any region (tied with Central QLD), and 7pp above the Queensland Net.

North QLD also has the **highest rates of group participation**, with 34% of people participating in the scheme via a workplace, school, club or similar. **Indirect participation** (e.g. giving containers to someone else) has stayed stable.

**Opportunity size:** ~10% of people are either unaware of the scheme or open to participating but haven't yet. Within North QLD, only 4% are firm rejectors.

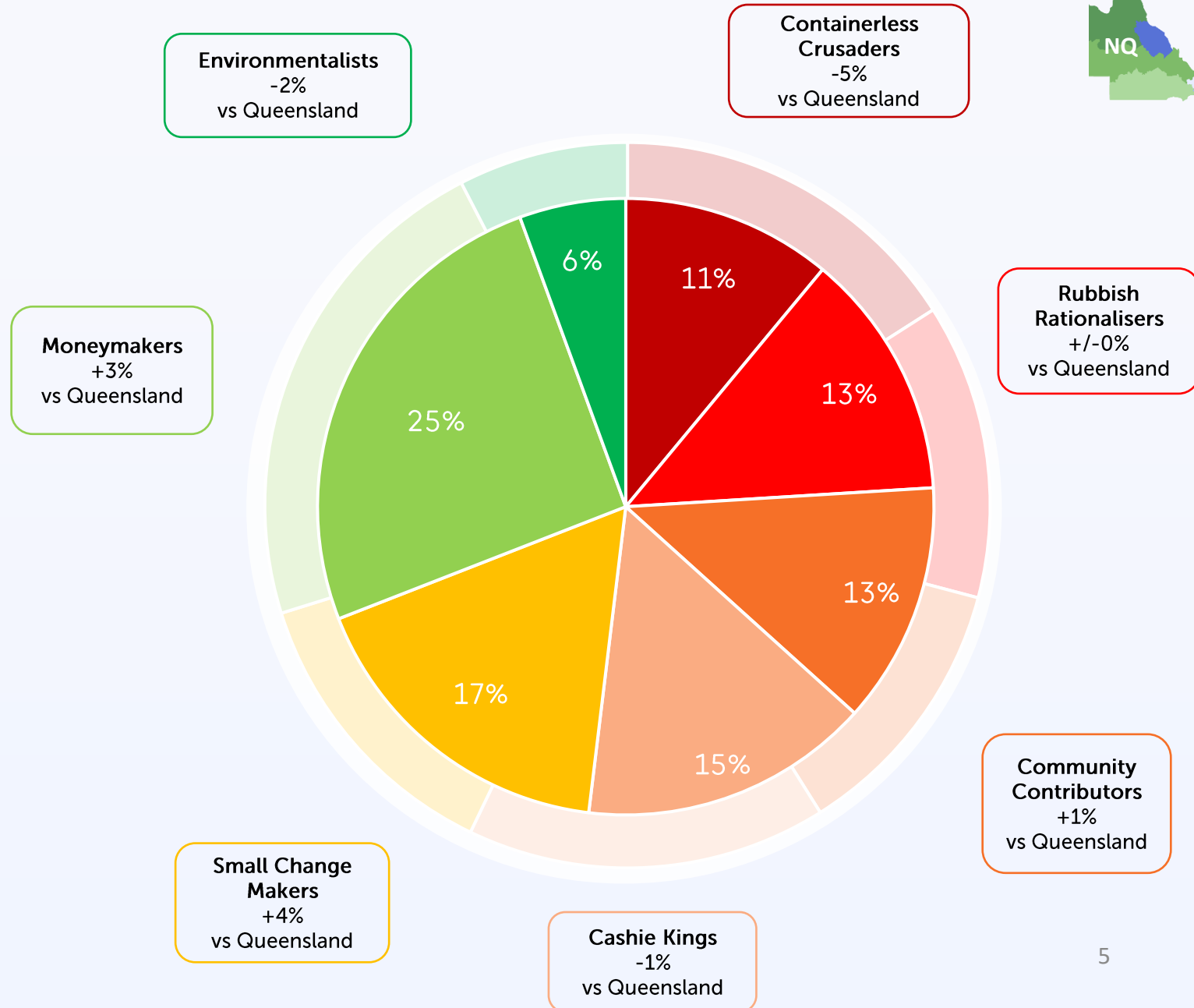
## Participation Breakdown



# North Queensland Customer Segments

Compared with other regions, North QLD has a high proportion (31%) of our most engaged customers – *Environmentalists* and *Moneymakers*. These are dedicated groups, with no barriers to participating.

About 2 in 3 customers face some barriers to participation, with *Small Change Makers* and *Cashie Kings* being the largest of these groups.



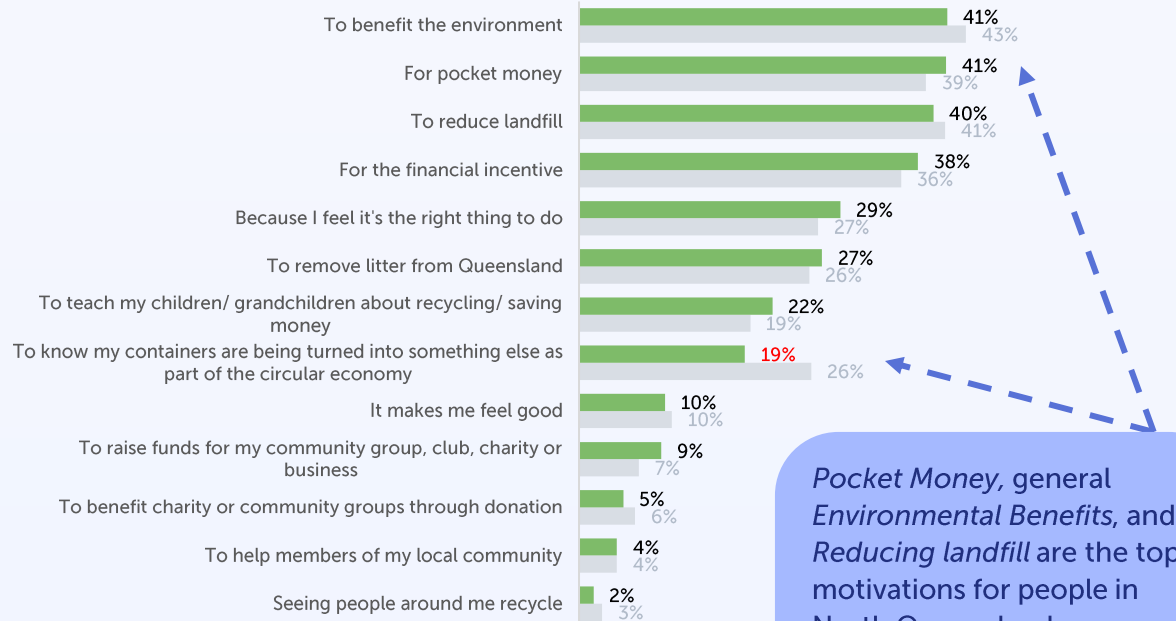
# North Queensland

## Why do/ don't people participate?



### Motivations

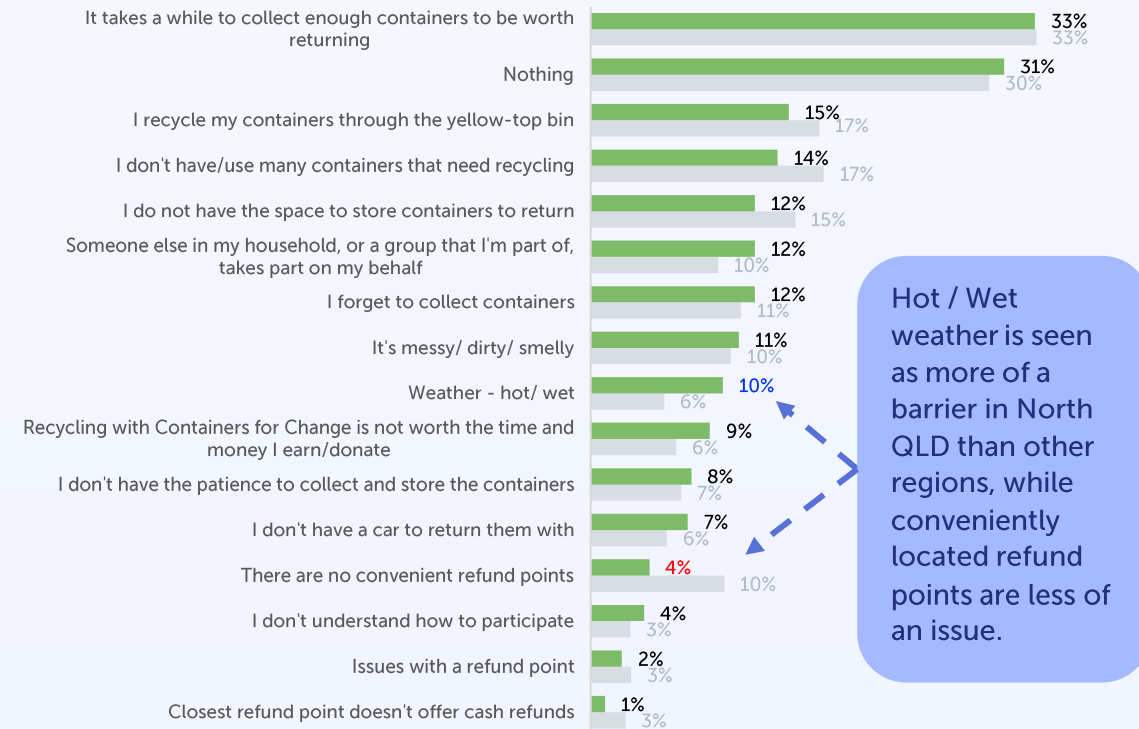
■ NQ ■ Queensland NET



*Pocket Money, general Environmental Benefits, and Reducing landfill are the top motivations for people in North Queensland. Significantly less people are motivated by circularity specifically compared with other regions.*

### Barriers

■ NQ ■ Queensland NET



*Hot / Wet weather is seen as more of a barrier in North QLD than other regions, while conveniently located refund points are less of an issue.*

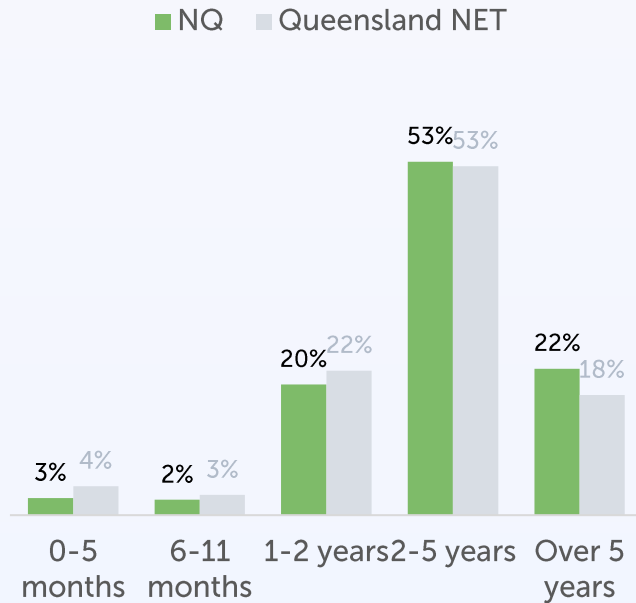
# North Queensland

## How is the experience?

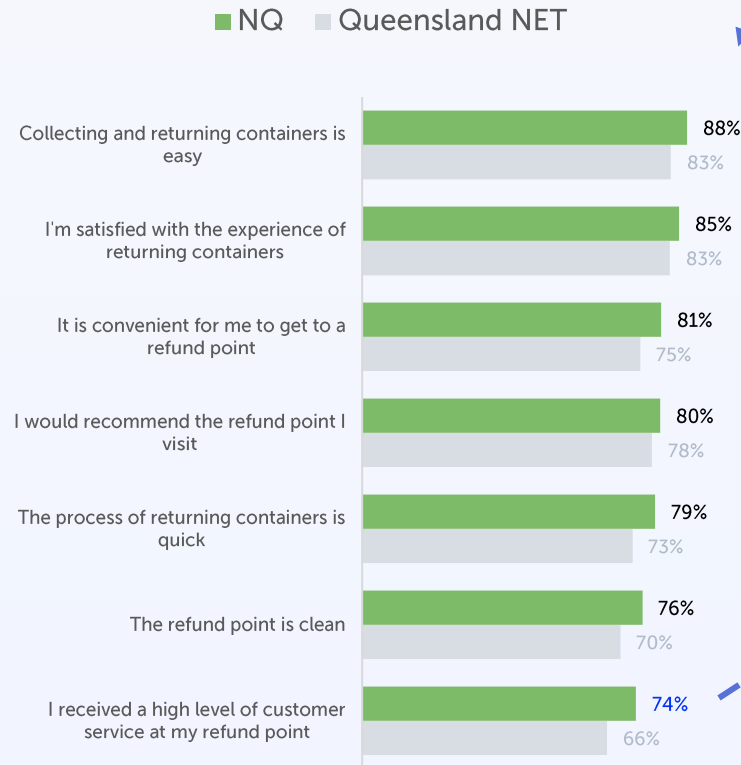


North Queensland exceeds the average across all experience metrics, with consistently strong customer service across waves.

### Tenure



### Experience



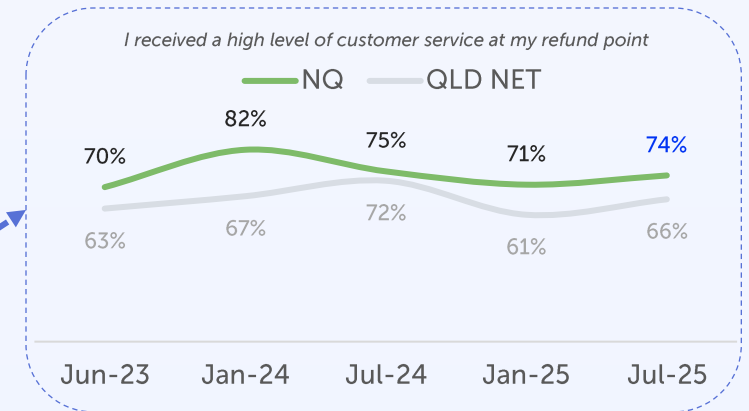
### Feedback

*"The staff are fantastic. Come and help you."*

*"I have never had an issue with Containers for Change"*

*"Working good in my community"*

*"It's always been a simple easy process of dropping off in person, and the satisfaction of getting a bit of cash in your hand"*



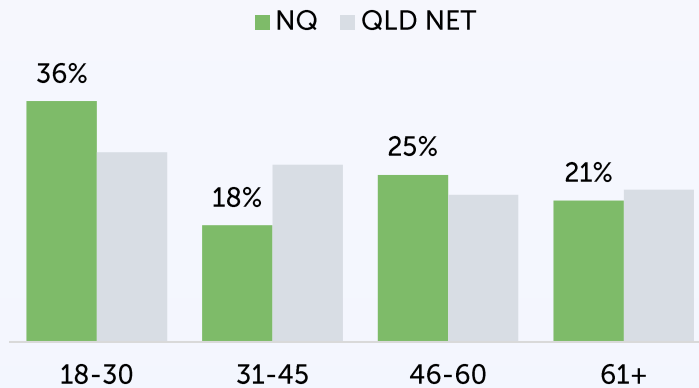
# North Queensland

## Not yet participating, but open to it

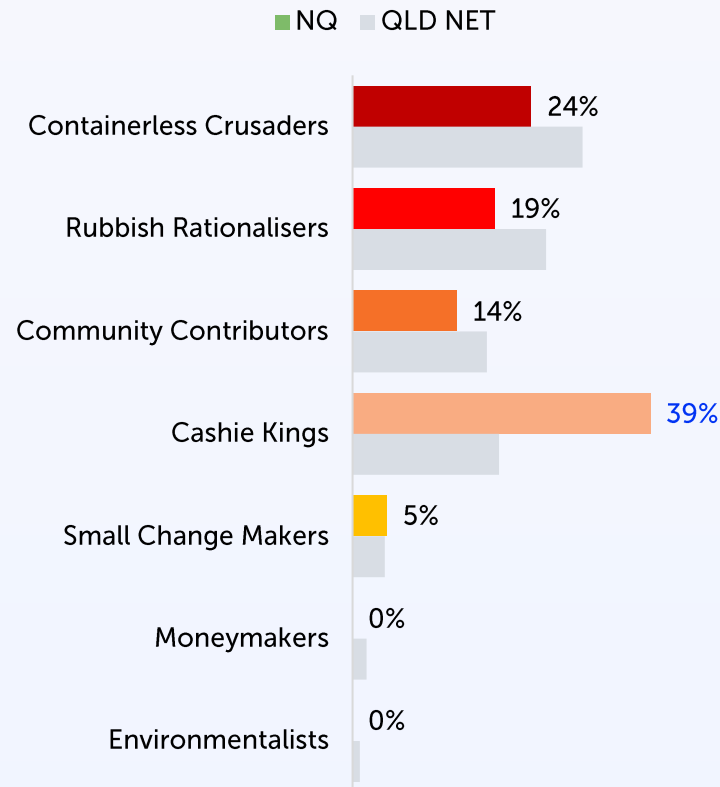
Potential customers are mainly deterred by the convenience of yellow bins, the time needed to collect enough containers for a worthwhile return, and forgetting to save containers to begin with. They tend to be 'Cashie Kings,' motivated by earning extra pocket money.



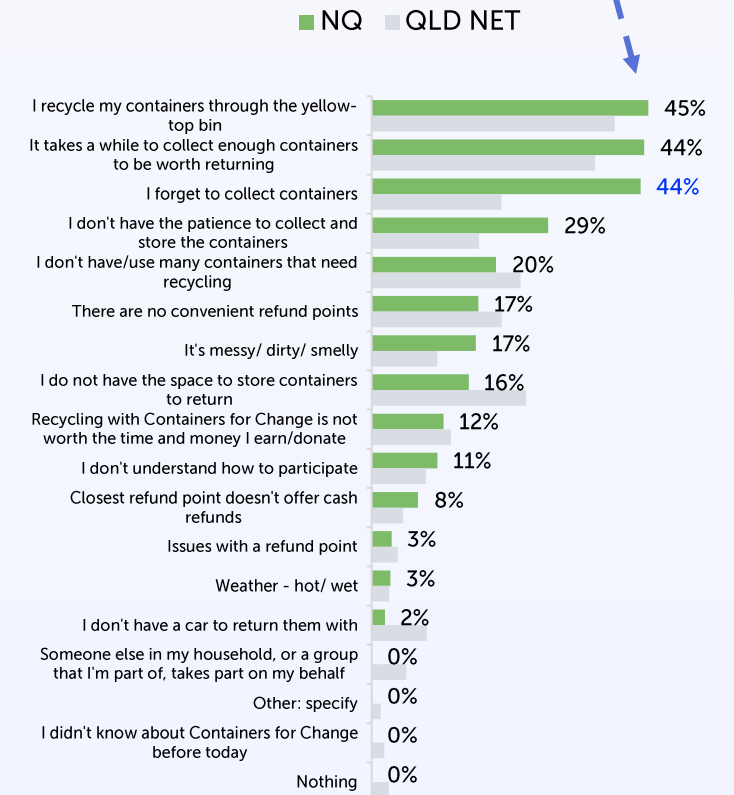
### Age & Gender



### Segment



### Barriers

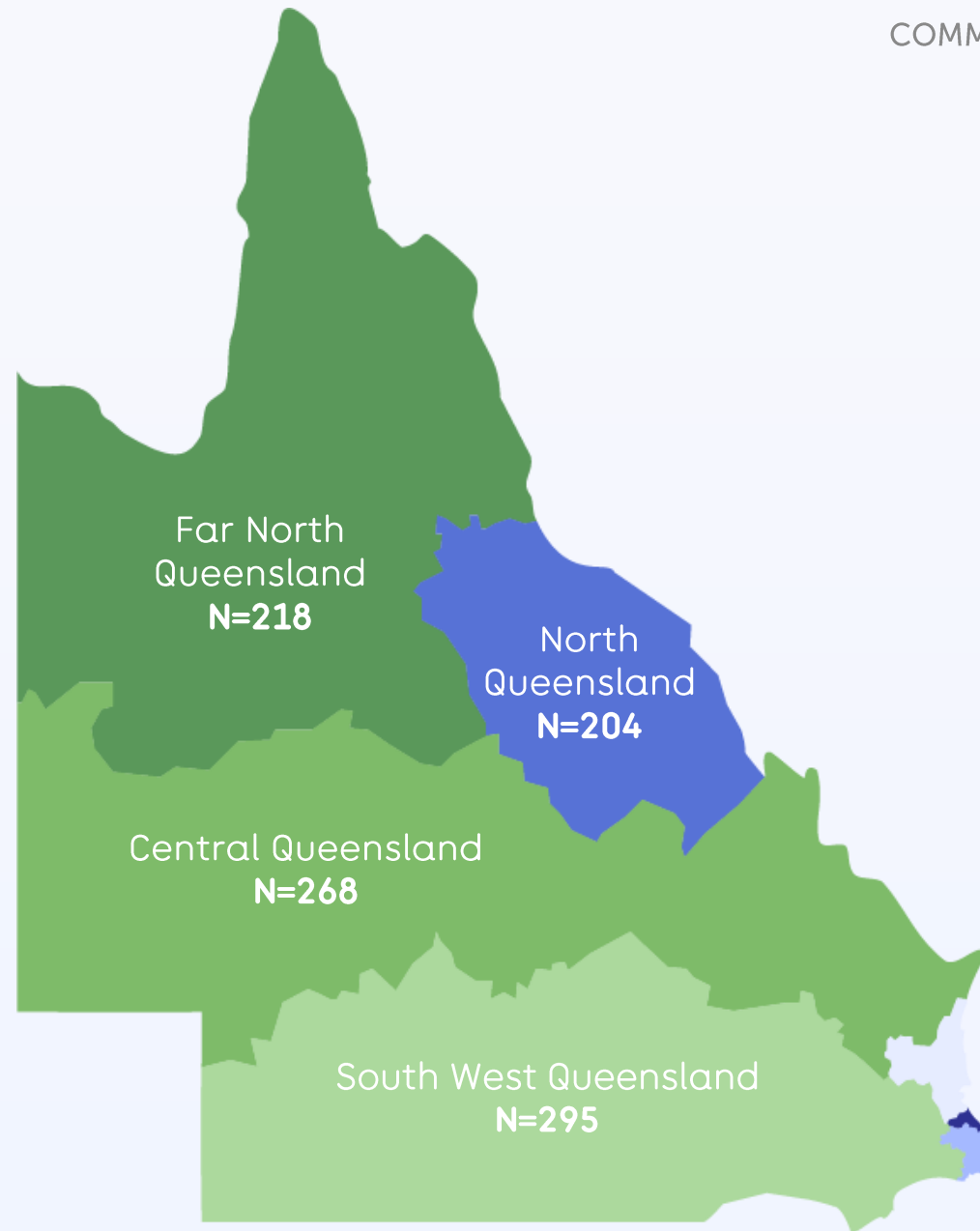




# About the research

From 16<sup>th</sup> July to 11<sup>th</sup> 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.



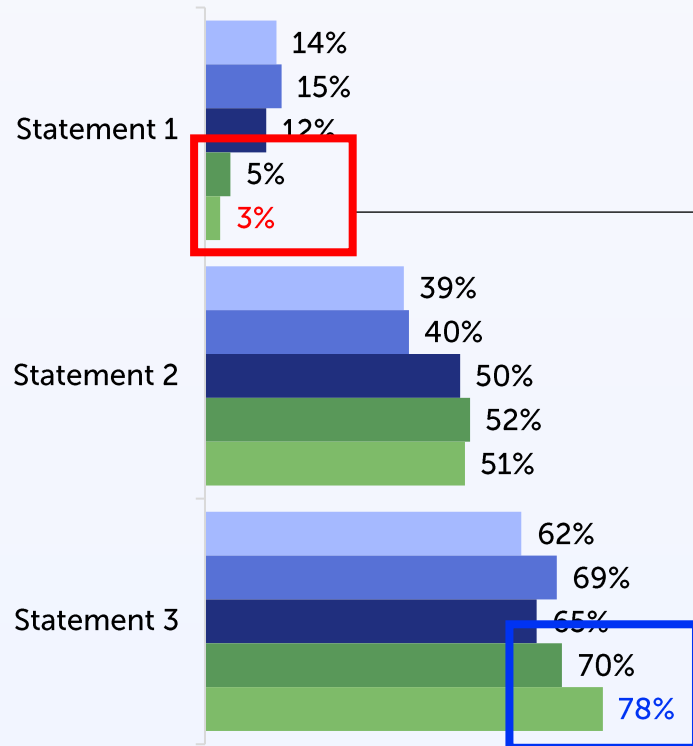
Brisbane North  
**N=690**

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**

**Customer Experience  
Manager**



**Jennifer Haig**

**Research & Insights  
Lead**

