



Mid-2025 Customer Survey

Operator Pack – Brisbane North

COMMERCIAL IN CONFIDENCE

October 2025

Brisbane North Key Metrics



67%

Participate at
home

-7% vs 74%
Queensland NET

61% collect & return

6% collect but give to others
to return

28%

Participate
with a group

+3% vs 25%
Queensland NET

3% are responsible for the
group's participation

25% give containers to the
group in some way

90%

Aware of the
brand

-1% vs 91%
Queensland NET

87%

Would
recommend
the scheme

-1% vs 88%
Queensland NET



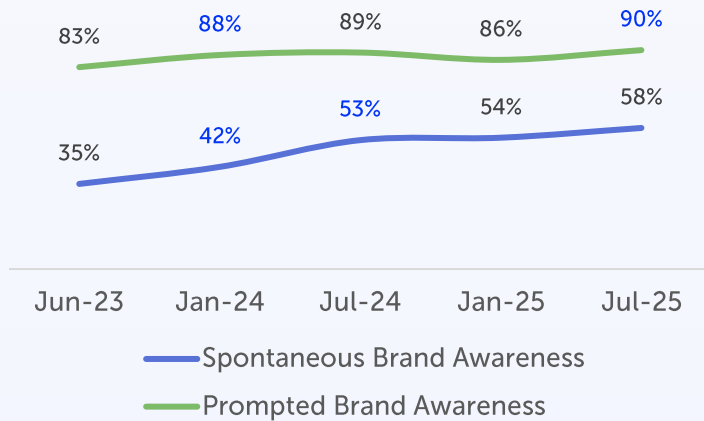
Brisbane North

Key Metrics Longitudinal Trends

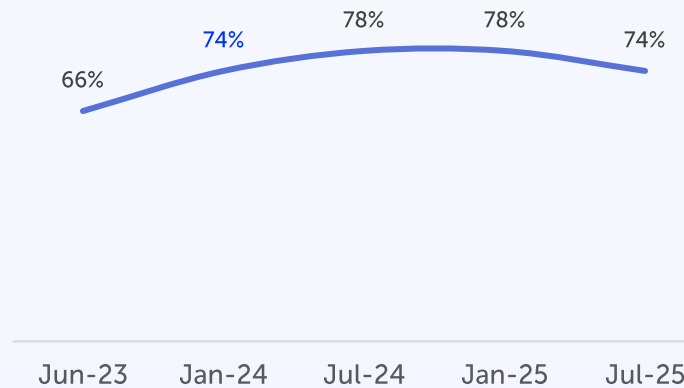


Bris North customers gave slightly lower Net Promoter Score (NPS) and Customer Satisfaction Score (CSAT) than other regions. Participation fell slightly this wave, but was generally steady for both group and at home.

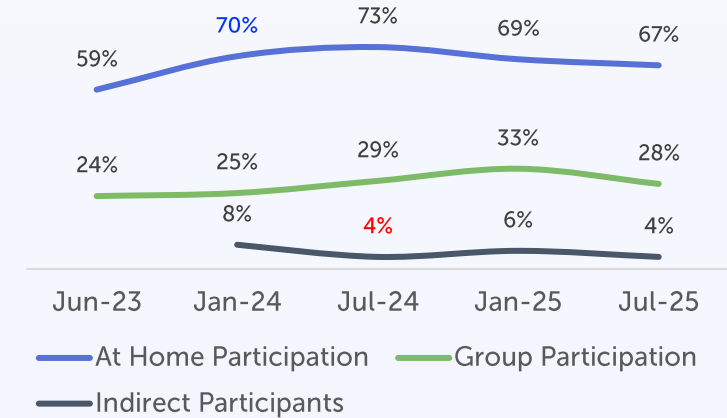
Awareness



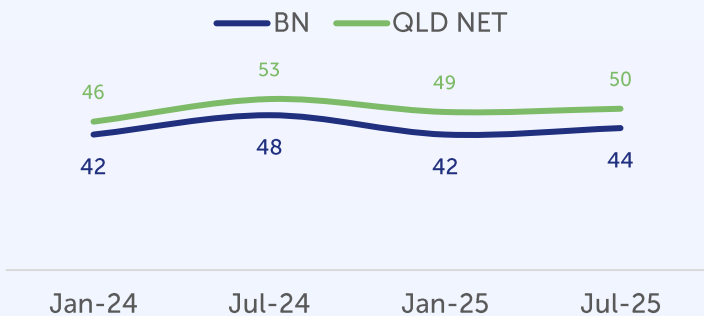
Total Participation



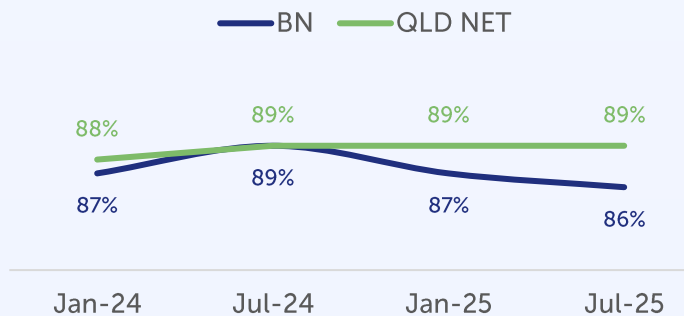
Participation Types



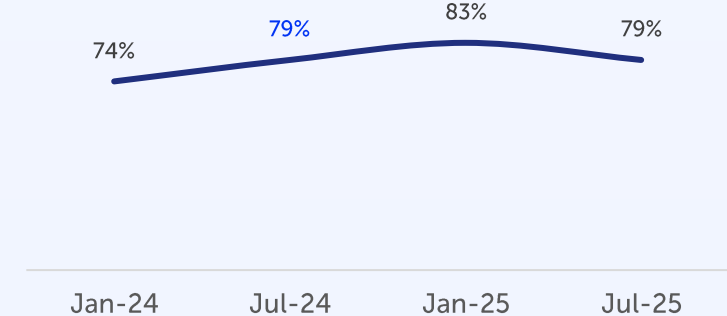
NPS



CSAT



Trust



Brisbane North Participation Breakdown

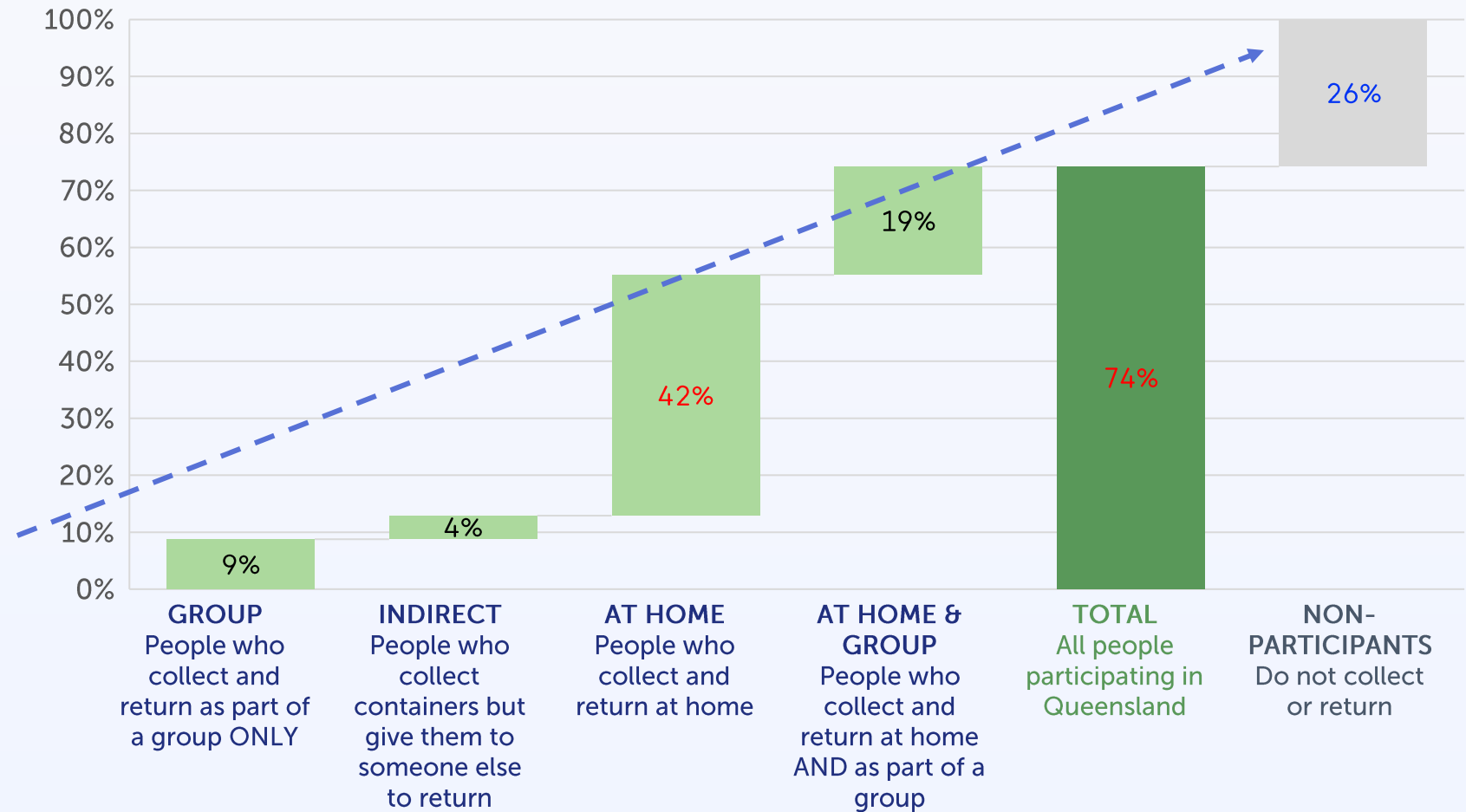
Bris North Participation: Brisbane North has the lowest rate of participation, 5pp below the Queensland Net.

Most people are participating *At Home Only*, and slightly less people are participating in groups like workplaces, sporting clubs or schools. **Indirect participation** (e.g. giving containers to someone else) has stayed relatively stable.

Opportunity size: ~21% of people are either unaware of the scheme or open to participating but haven't yet. Within Brisbane North, only 5% are firm rejectors.



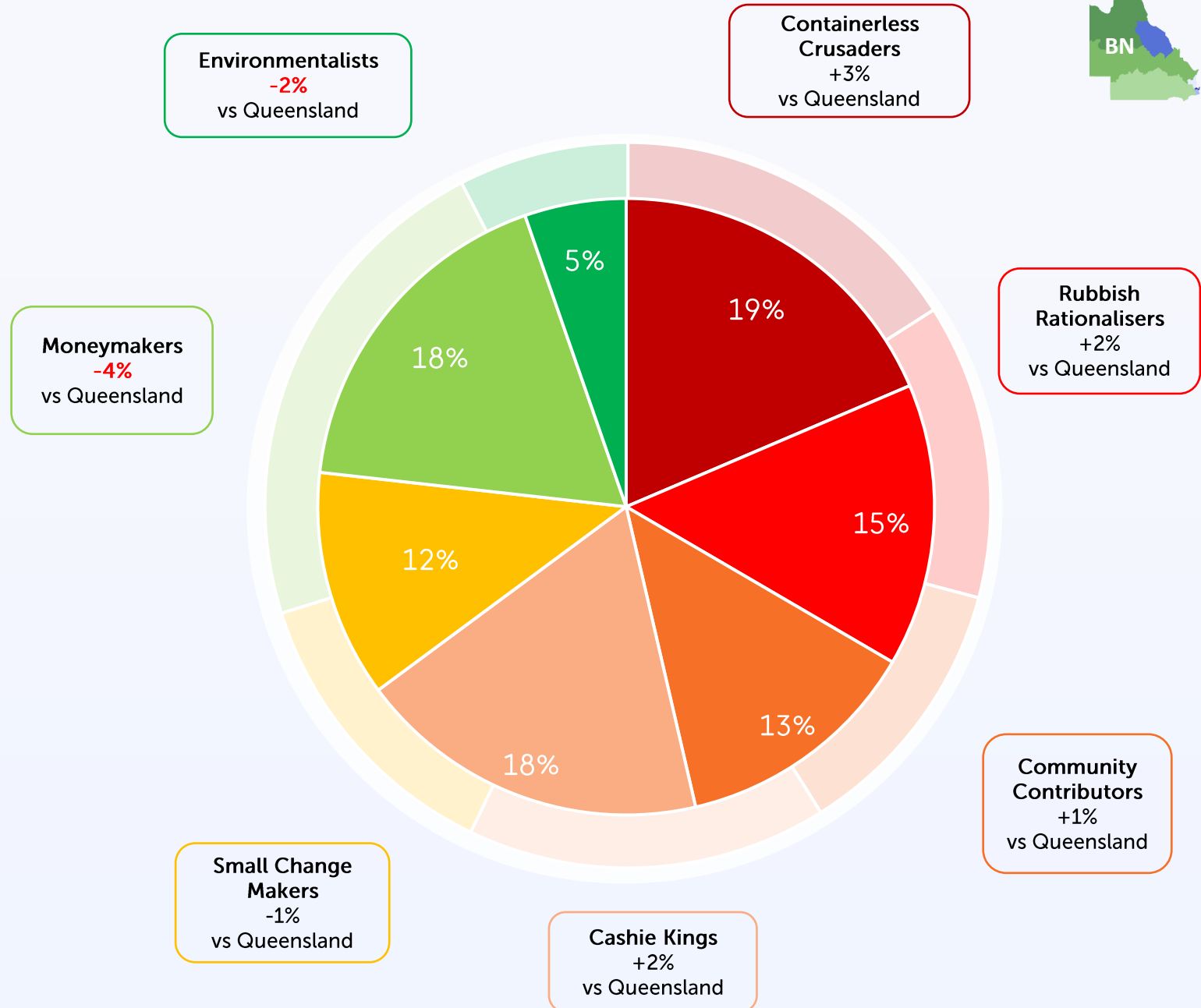
Participation Breakdown



Brisbane North Customer Segments

Compared with other regions, Brisbane North has a smaller base of engaged customers, with only 35% falling into our most engaged segments — *Moneymakers, Environmentalists, and Small Change Makers*. Compared to 43% statewide, this reflects lower rates of participation and more representation from less-engaged customer segments.

About 4 in 5 customers face some barriers to participation, a significantly higher proportion than elsewhere in the state.



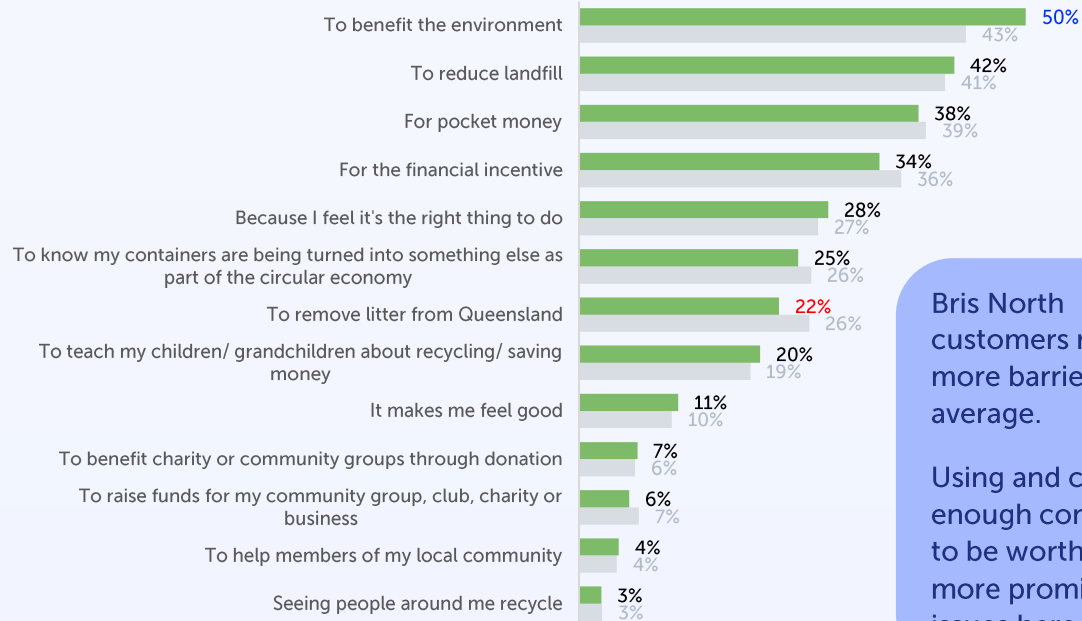
Brisbane North

Why do/ don't people participate?



Motivations

■ BN ■ Queensland NET

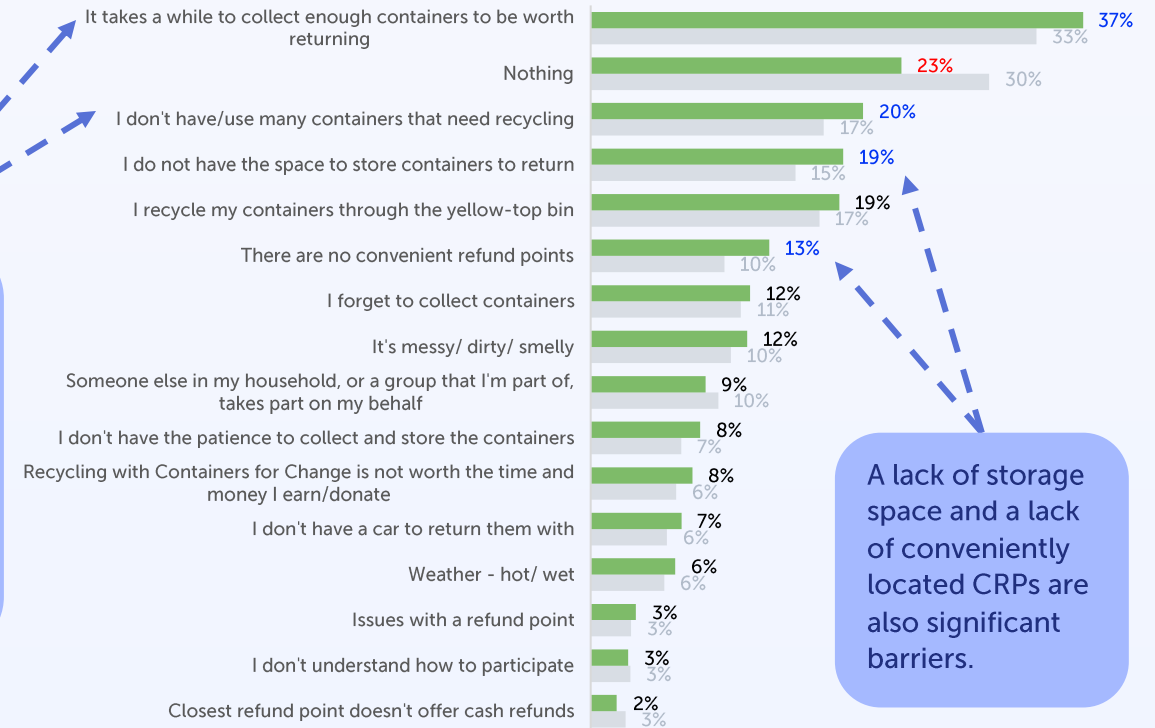


Bris North customers report more barriers than average.

Using and collecting enough containers to be worth it are more prominent issues here.

Barriers

■ BN ■ Queensland NET



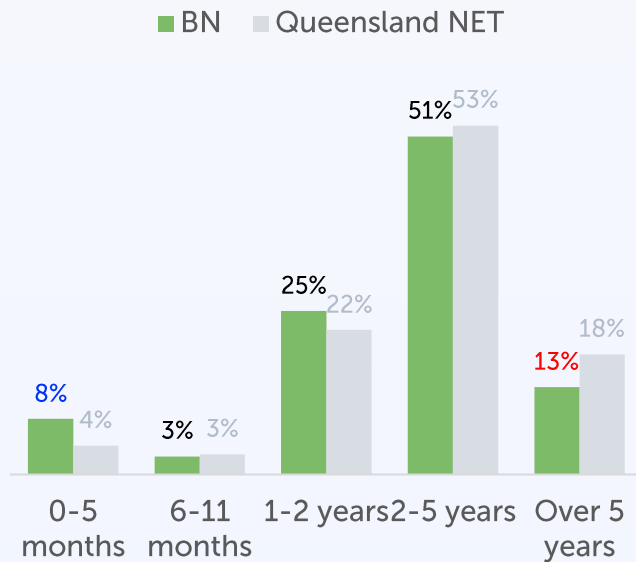
A lack of storage space and a lack of conveniently located CRPs are also significant barriers.

Brisbane North

How is the experience?

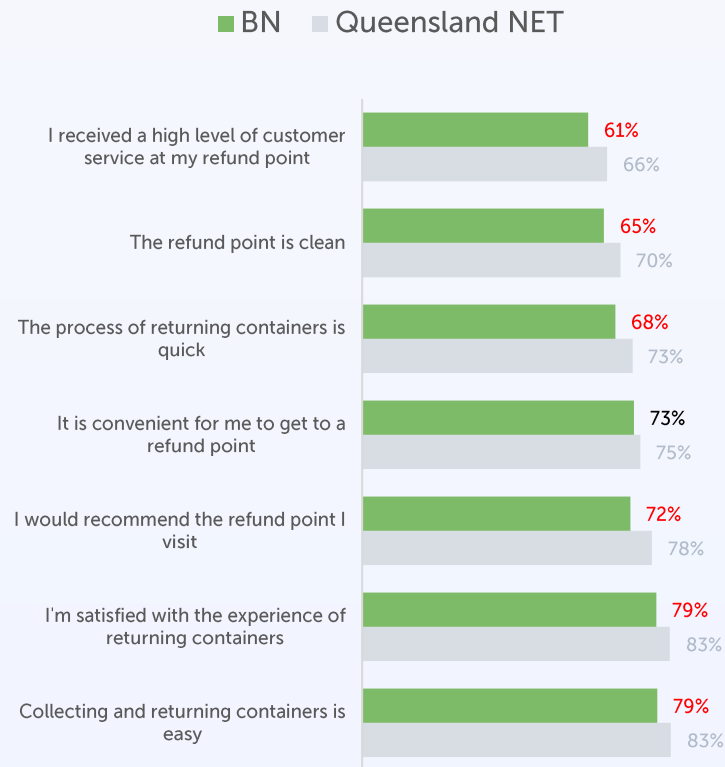


Tenure



Lower participation means more recent joiners, though most customers have participated for 2yrs+

Experience



Feedback

"It is good for the environment and has a positive impact on climate change"

"It takes a little bit of organizing as I don't have much storage space"

"Easy to do, friendly service, assistance if required"

"Staff come to assist quickly & are helpful & friendly"

Bris North has lower scores on customer experience, though the numbers are generally stable from last wave. It's also worth noting that general comments on the scheme from customers in this region are still majority positive.

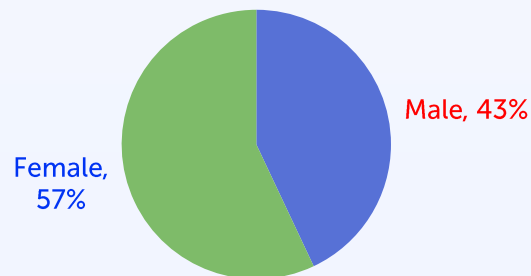
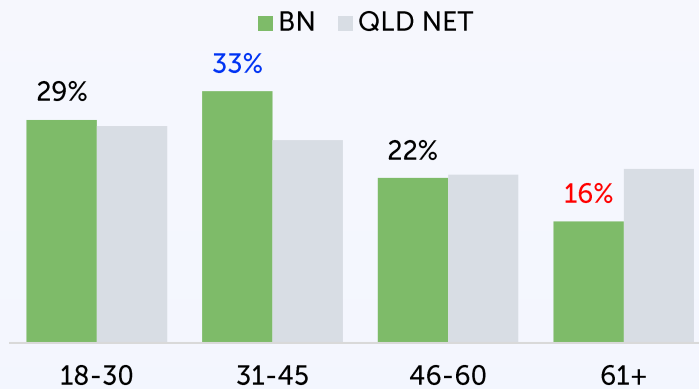
Brisbane North

Not yet participating, but open to it

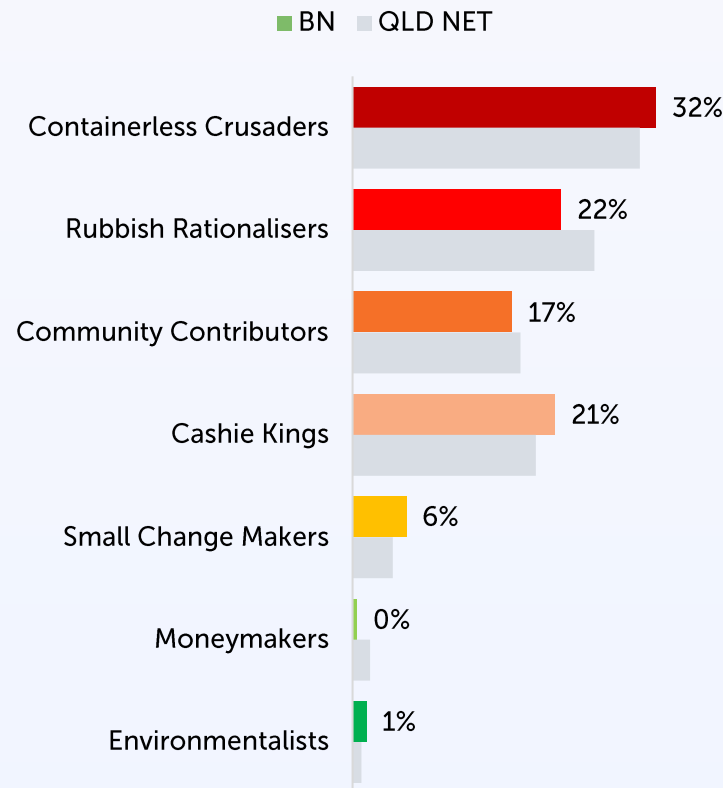


Potential new customers are mostly held back by how long it takes to collect enough to make a return worthwhile. They're more likely than other regions to be women and aged 31-45, and less likely to be male or aged 61+.

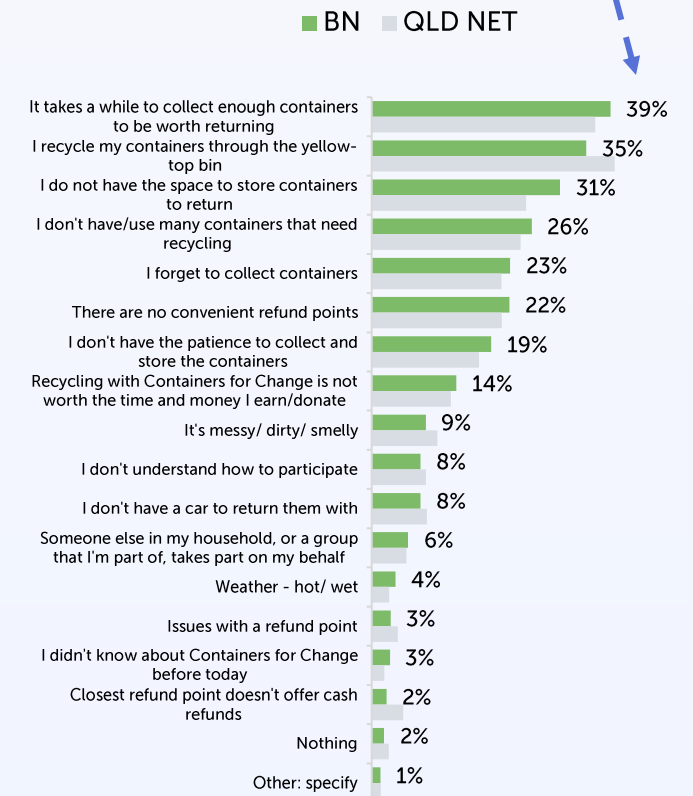
Age & Gender



Segment



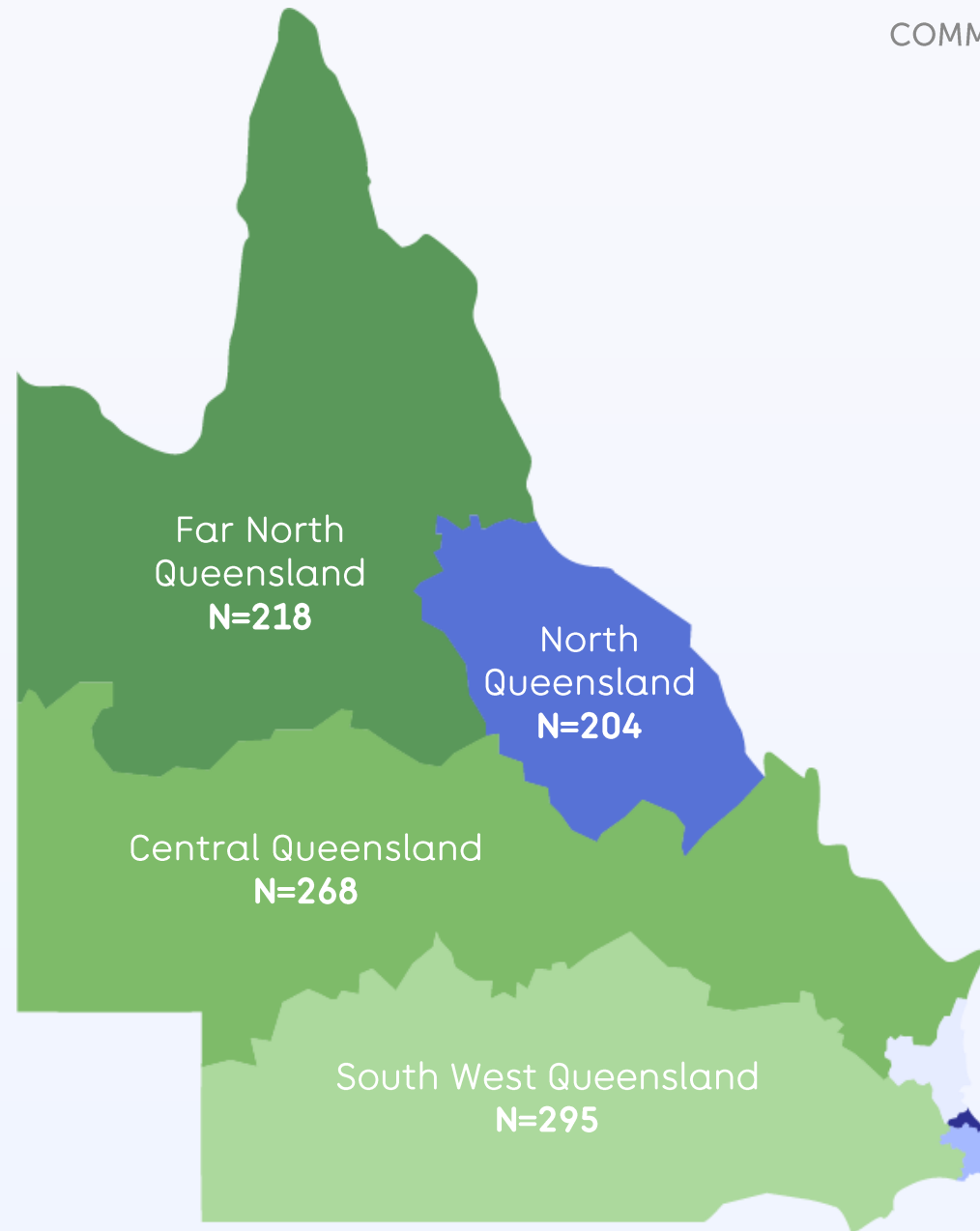
Barriers



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.



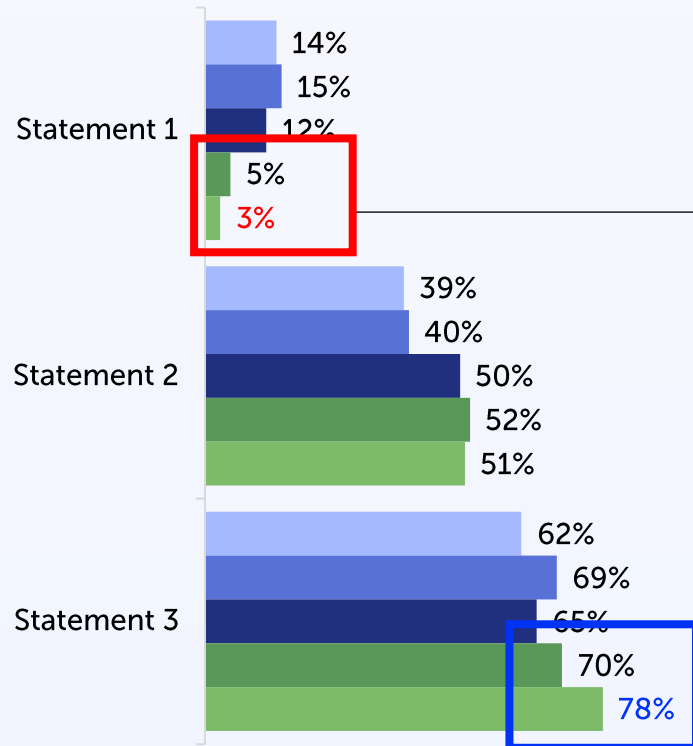
Brisbane North
N=690

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

**Customer Experience
Manager**



Jennifer Haig

**Research & Insights
Lead**

