



Mid-2025 Customer Survey

Operator Pack – Brisbane South

COMMERCIAL IN CONFIDENCE

October 2025

Brisbane South Key Metrics



69%

Participate at
home

-5% vs 74%
Queensland NET

61% collect & return

6% collect but give to others
to return

27%

Participate
with a group

+2% vs 25%
Queensland NET

3% are responsible for the
group's participation

24% give containers to the
group in some way

92%

Aware of the
brand

+1%vs 91%
Queensland NET

84%

Would
recommend
the scheme

-4% vs 88%
Queensland NET



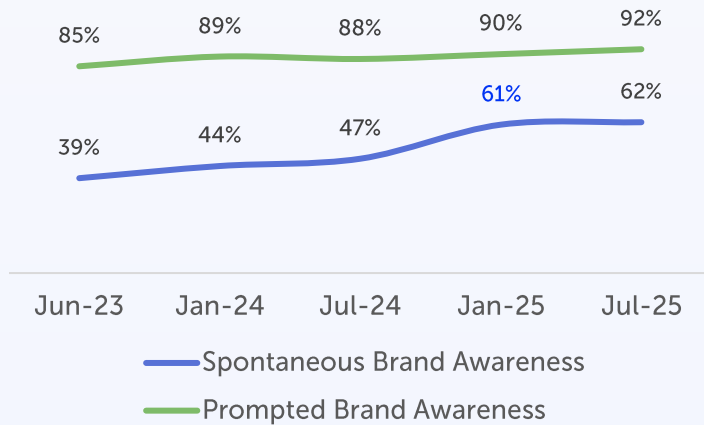
Brisbane South

Key Metrics Longitudinal Trends

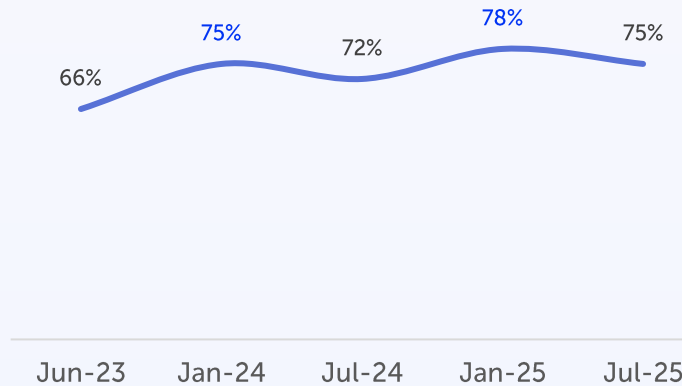


Less group participation this wave compared with Bris South results from Jan. This has been largely offset by more 'At Home Only' participation.

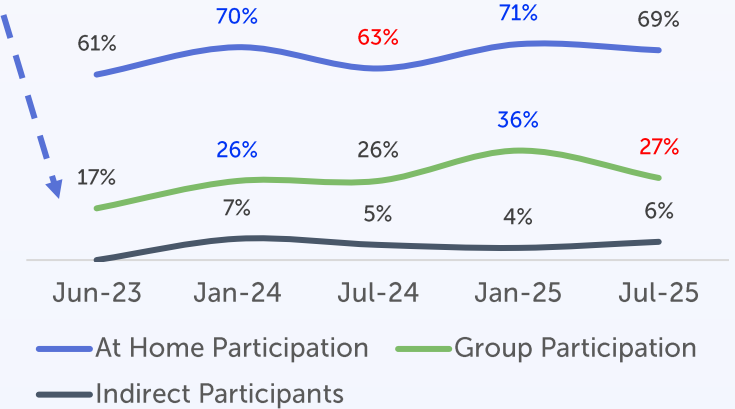
Awareness



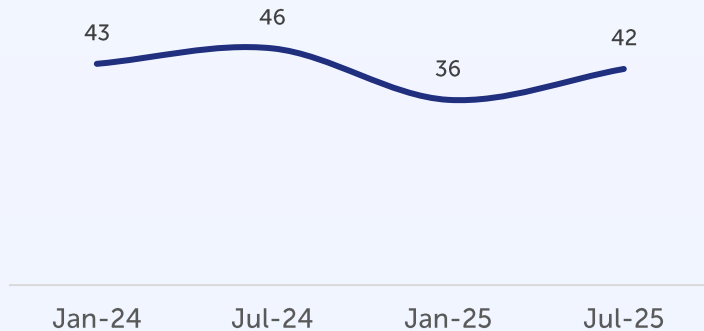
Total Participation



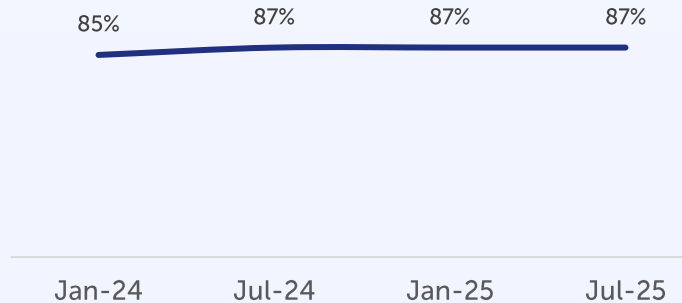
Participation Types



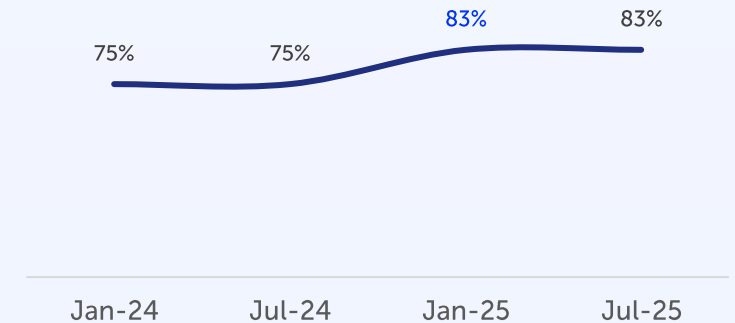
NPS



CSAT



Trust



Brisbane South Participation Breakdown

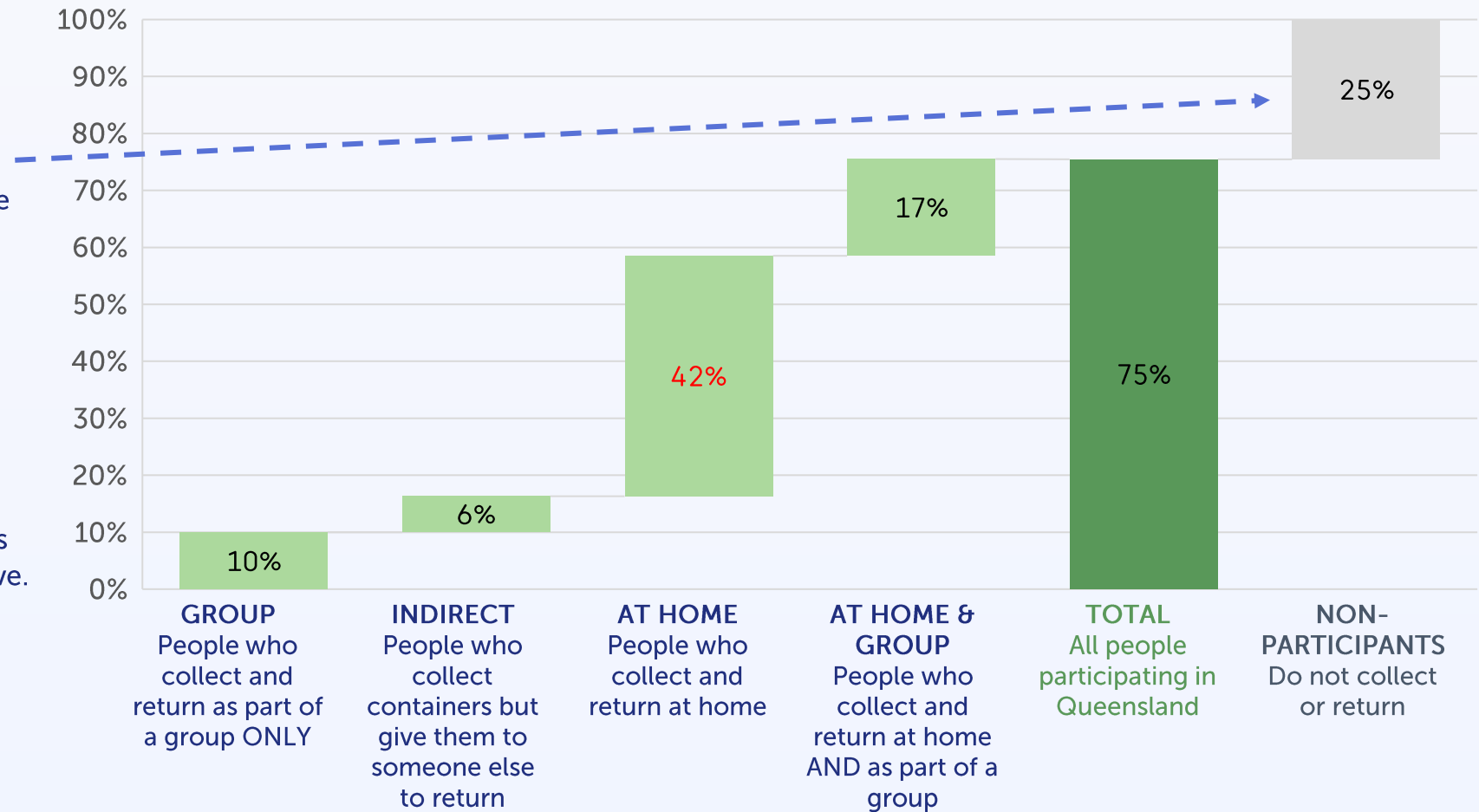
Opportunity size: ~19% of respondents are either unaware of the scheme or open to participating but haven't yet. Within Brisbane South, 6% are firm rejectors.

Brisbane South participation: Group participation is on par with other regions, though it has declined ~9% since January. However, this is offset by an ~9% rise in At Home Only participation, keeping overall engagement relatively stable.

Indirect participation (e.g. giving containers to someone else) has grown slightly this wave.



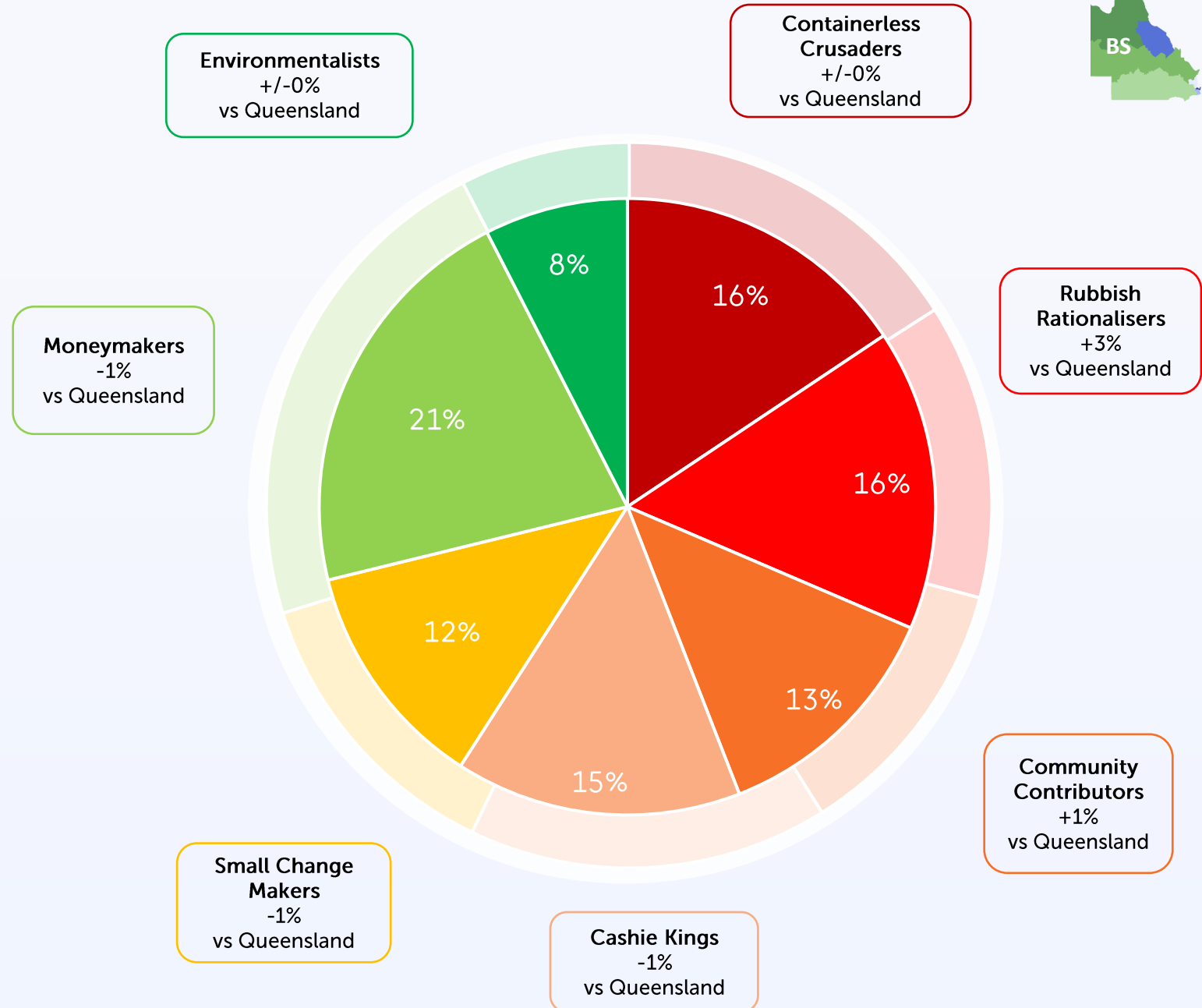
Participation Breakdown



Brisbane South Customer Segments

Brisbane South customer motivations and barriers align broadly with rest of state.

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



Brisbane South

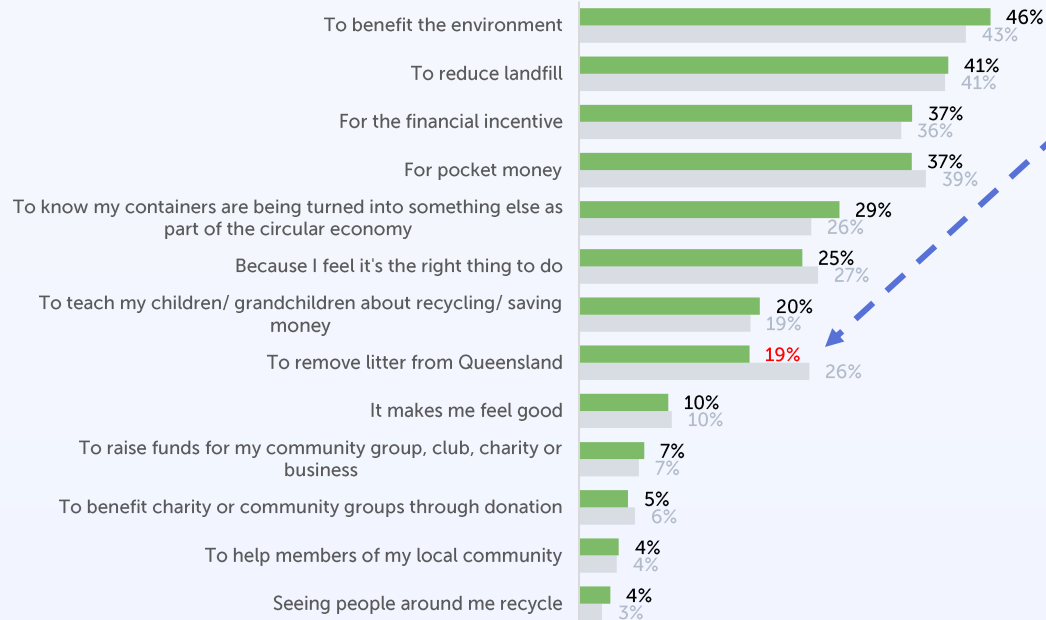
Why do/ don't people participate?



Brisbane South customers are less likely to be motivated by removing litter from Queensland than customers in other regions. Other barriers and motivations align to rest of state.

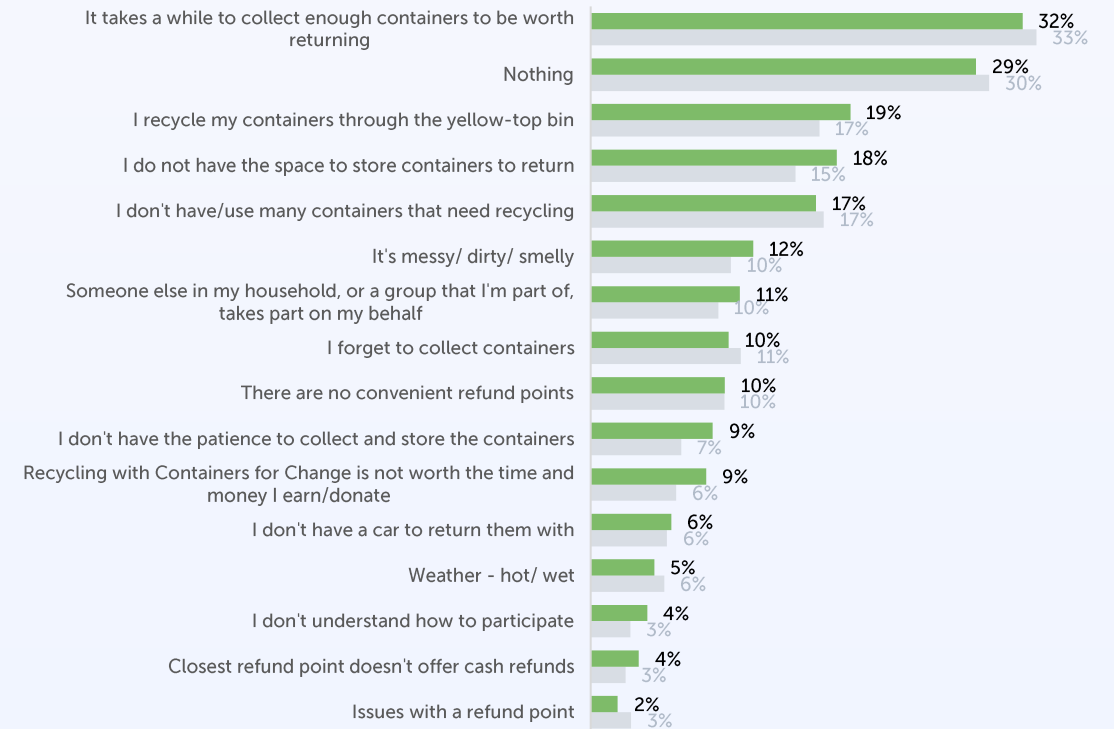
Motivations

■ BS ■ Queensland NET



Barriers

■ BS ■ Queensland NET



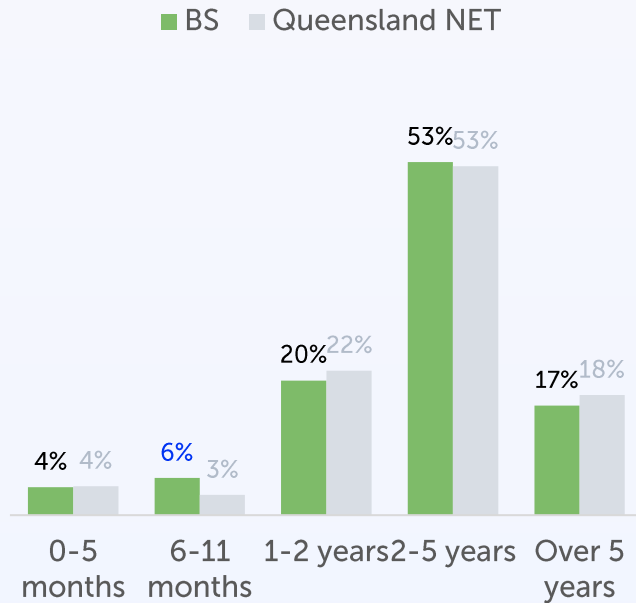
Brisbane South

How is the experience?

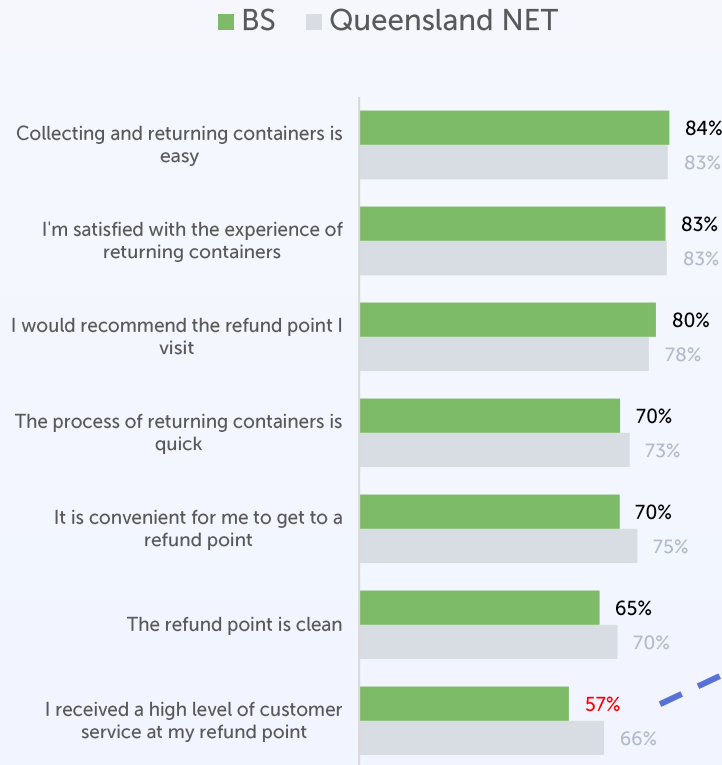


Bris South customers were significantly less likely to agree with that they'd received a high-level of customer service at their refund point when compared to other regions.

Tenure



Experience

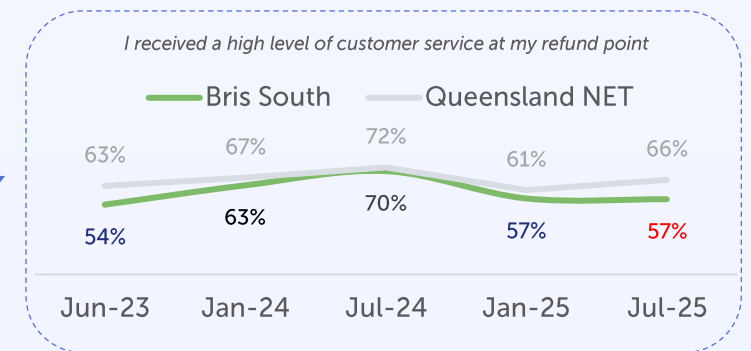


Feedback

"Good customer service means I'm more inclined to come back to that same depot and continue using the program."

"Have reverse vending machines at supermarkets"

"There is nothing they need to do. It's already a perfect scheme."



Brisbane South

Not yet participating, but open to it

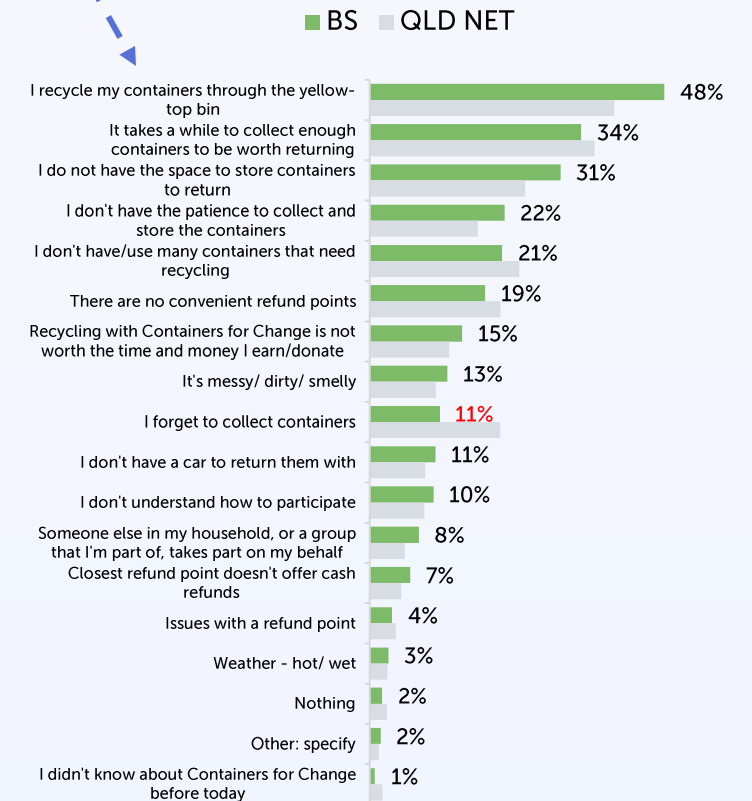
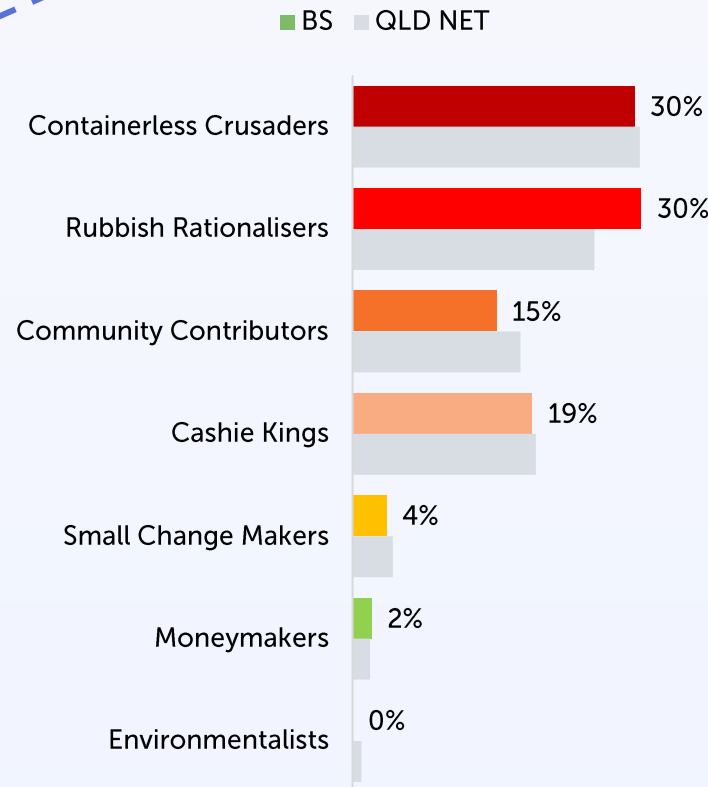
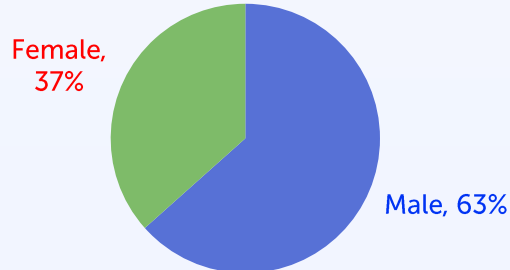
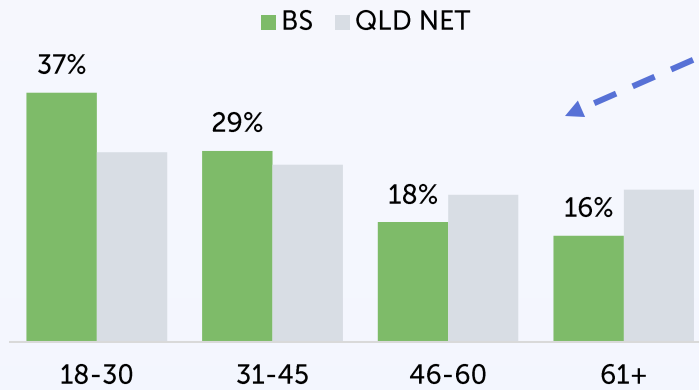


Potential customers are more likely to be Men under 30, and less likely to see 'forgetting to collect containers' as a barrier. Their main barriers are the presence of a yellow bin and the time it takes to return containers.

Age & Gender

Segment

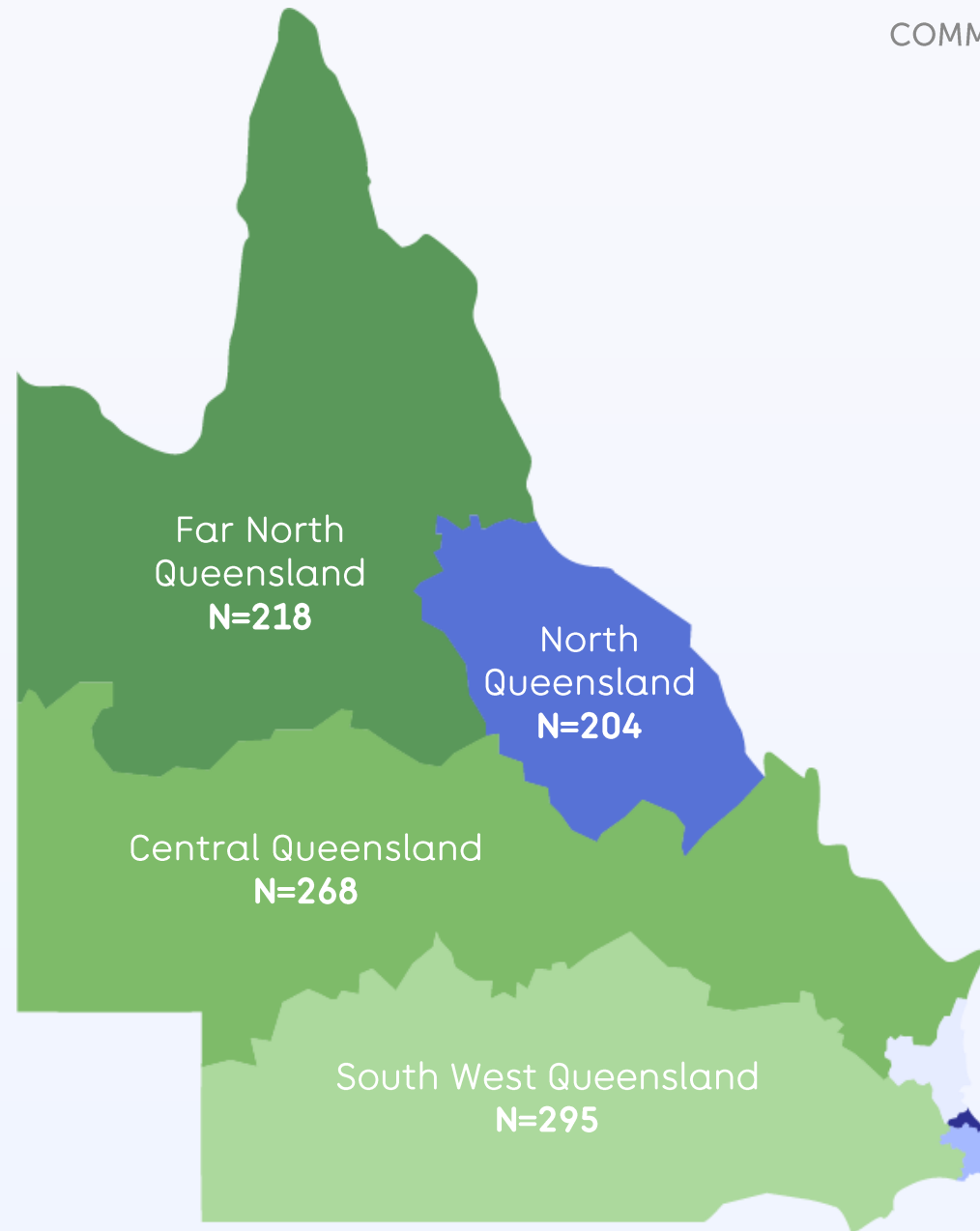
Barriers



About the research

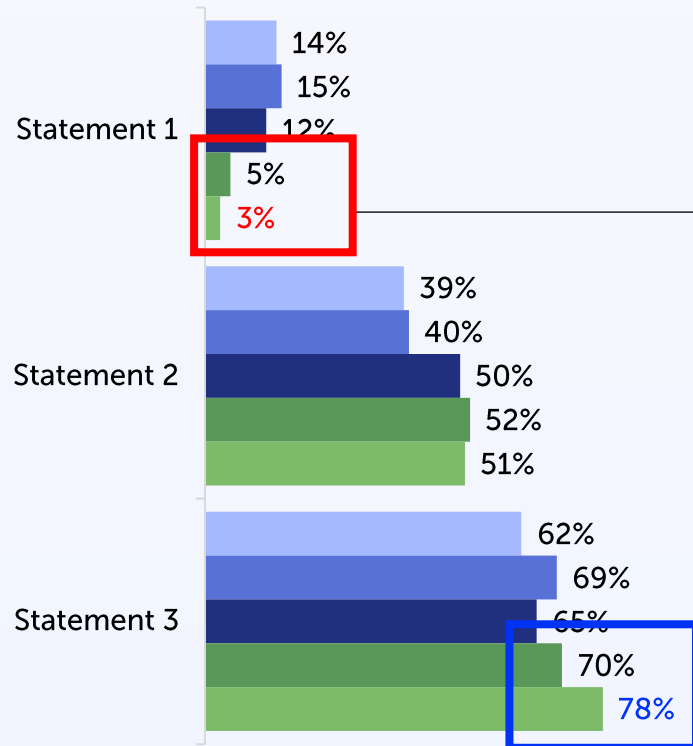
From 16th July to 11th August 2025, we surveyed 2,537 Queenslanders aged 18 and above to explore their views on recycling and Containers for Change.

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



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**

