Mid-2025 Customer Survey

Operator Pack

COMMERCIAL IN CONFIDENCE

October 2025

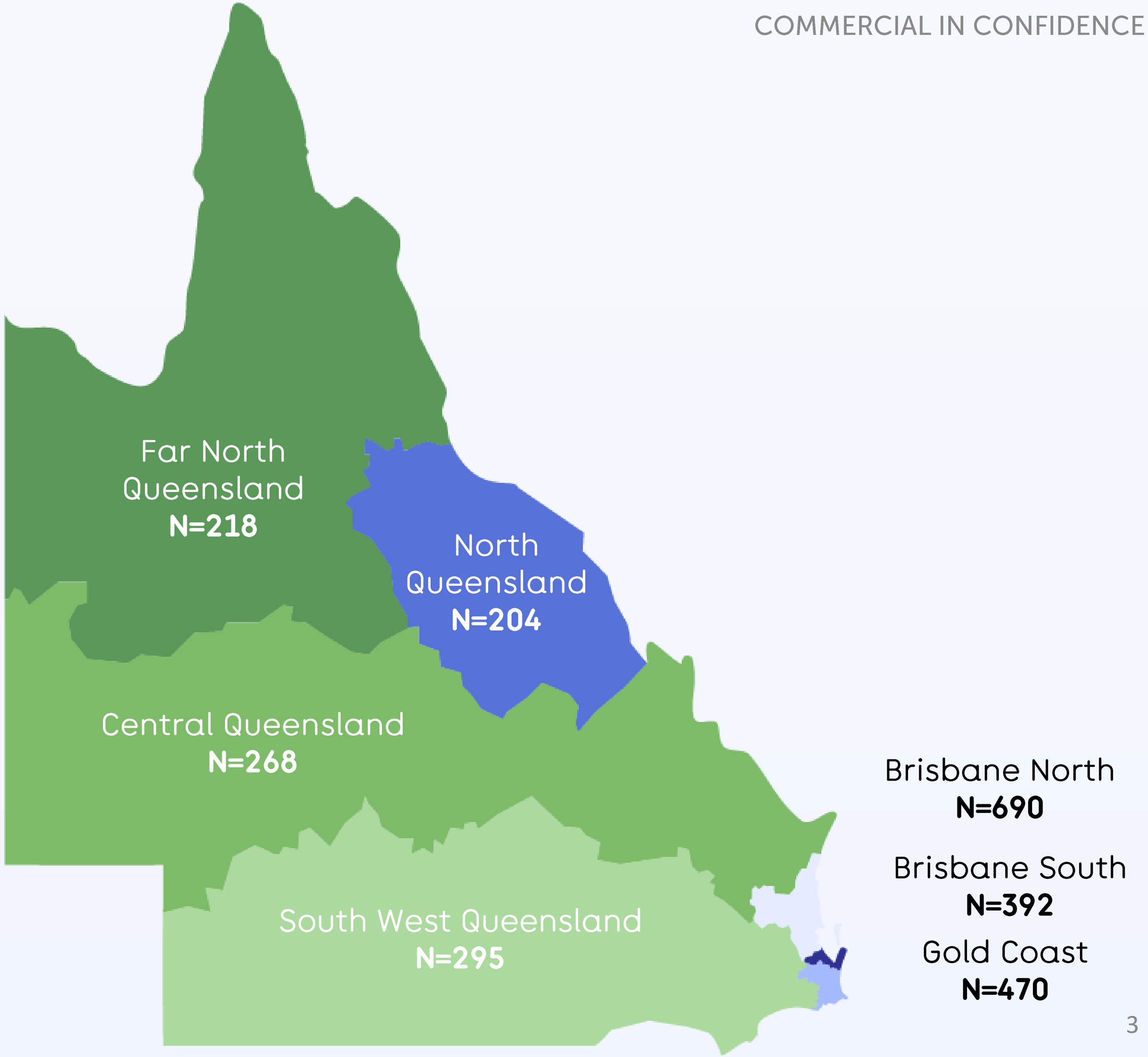
Contents

Container Exchange

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.

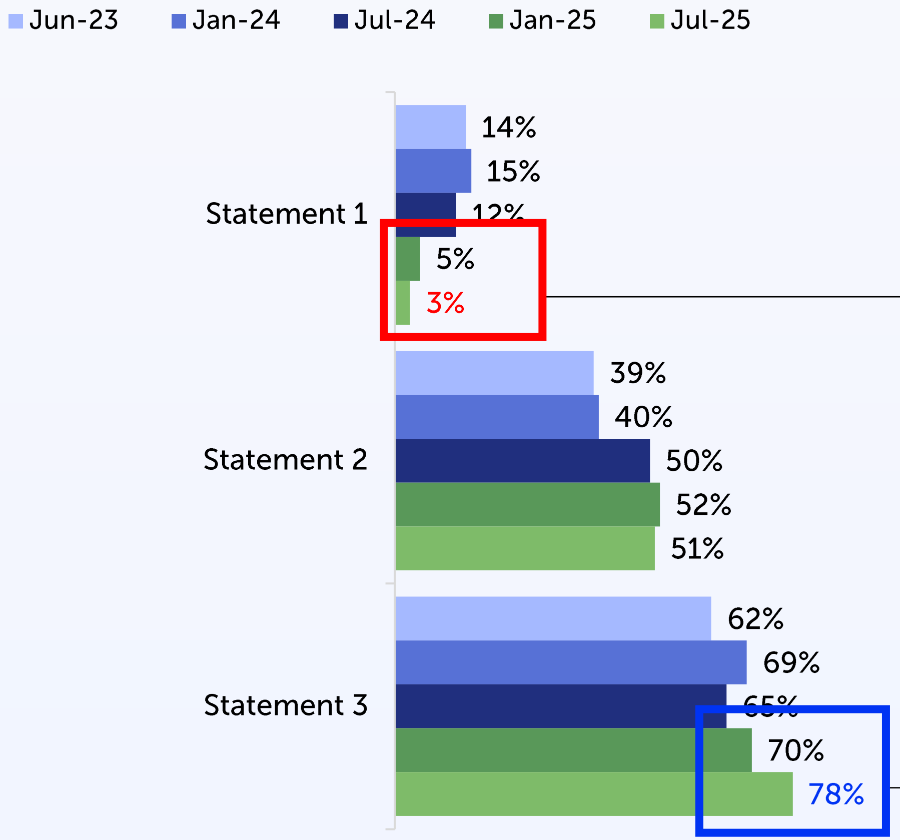
We achieved a robust sample across region, gender, age group, weekly container consumption, household types and income levels.



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.

Key Findings

Scheme awareness remains strong (96%) with nearly 80% of Queenslanders participating in some way.

People are participating less in group settings (at work, school etc.) and more only *At Home.*

18-30's and Community Contributors are the groups with the biggest challenges in collecting and returning.

Environmental impacts are still the top motivators, but using refunds as *Pocket Money* is gaining appeal.

Customer satisfaction remains high at 89%, with customer service a key factor.

Key barriers are now *time to collect enough containers* and limited *storage space*, especially for younger and metro area participants.

Awareness & participation

Who knows about the scheme and who's taking part?

How do we describe people who participate in Containers for Change?

GROUP ONLY

People who collect and return as part of a group ONLY

INDIRECT

People who collect containers but give them to someone else to return, but NOT to a group

AT HOME ONLY

People who collect and return at home ONLY

AT HOME & GROUP

People who collect and return at home AND as part of a group

TOTAL PARTICIPATION

All people participating in Queensland

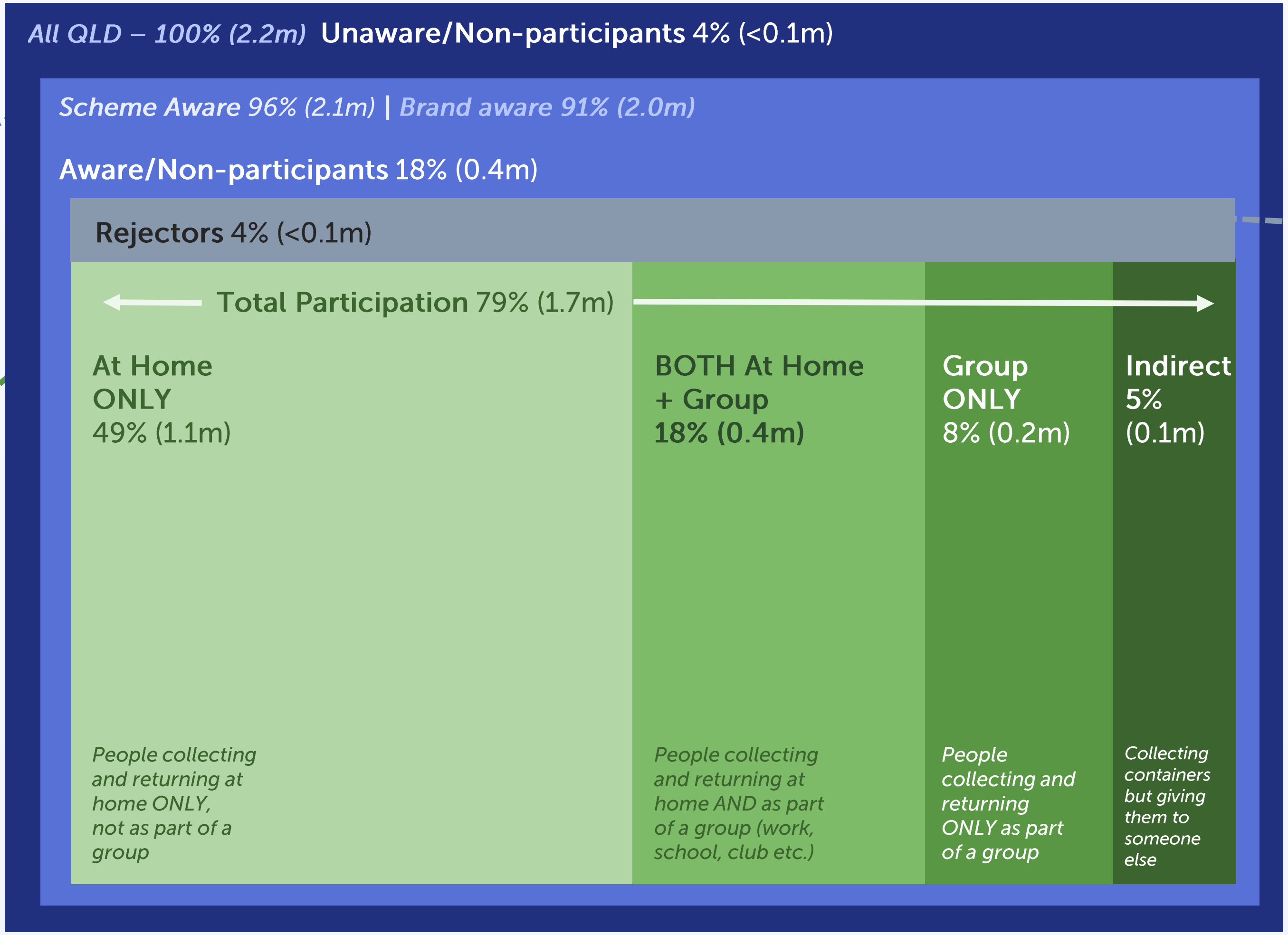
NON-PARTICIPANTS

Do not collect or return

Awareness and participation

Awareness of both the scheme (96%) and the Containers for Change Brand (91%) are very high.

Nearly 4 in 5 people are participating in some way, with the majority participating *at home only*.

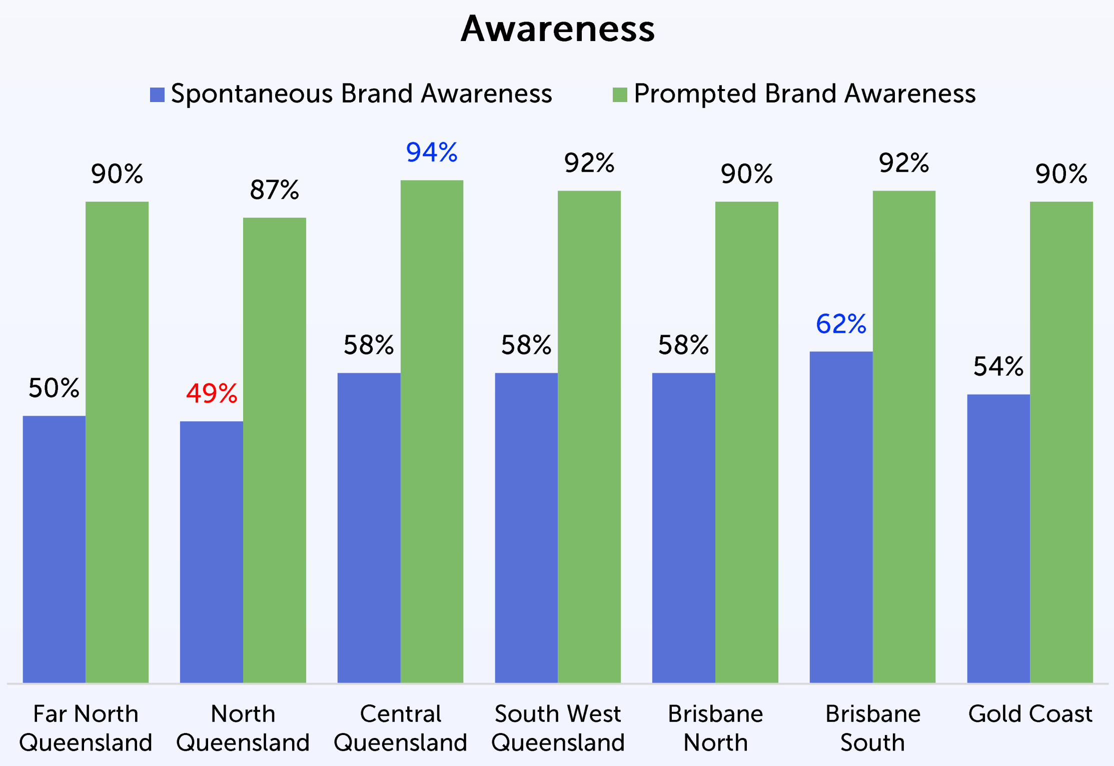


Volumes: Households in QLD

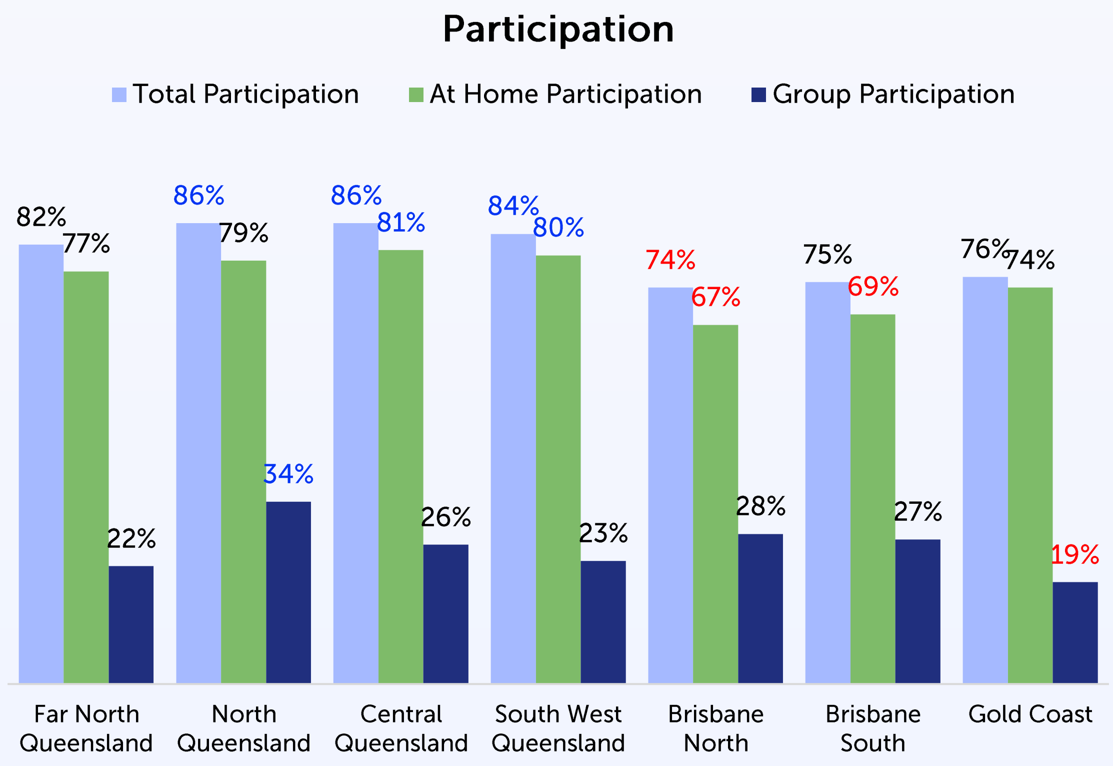
Firm rejection is low at 4%, split between past participants who won't return and those unwilling to try.

Differences between regions

Prompted brand awareness is highest in CQ, with spontaneous awareness highest in Brisbane South.



Participation is generally lower in metro areas, and higher regionally.



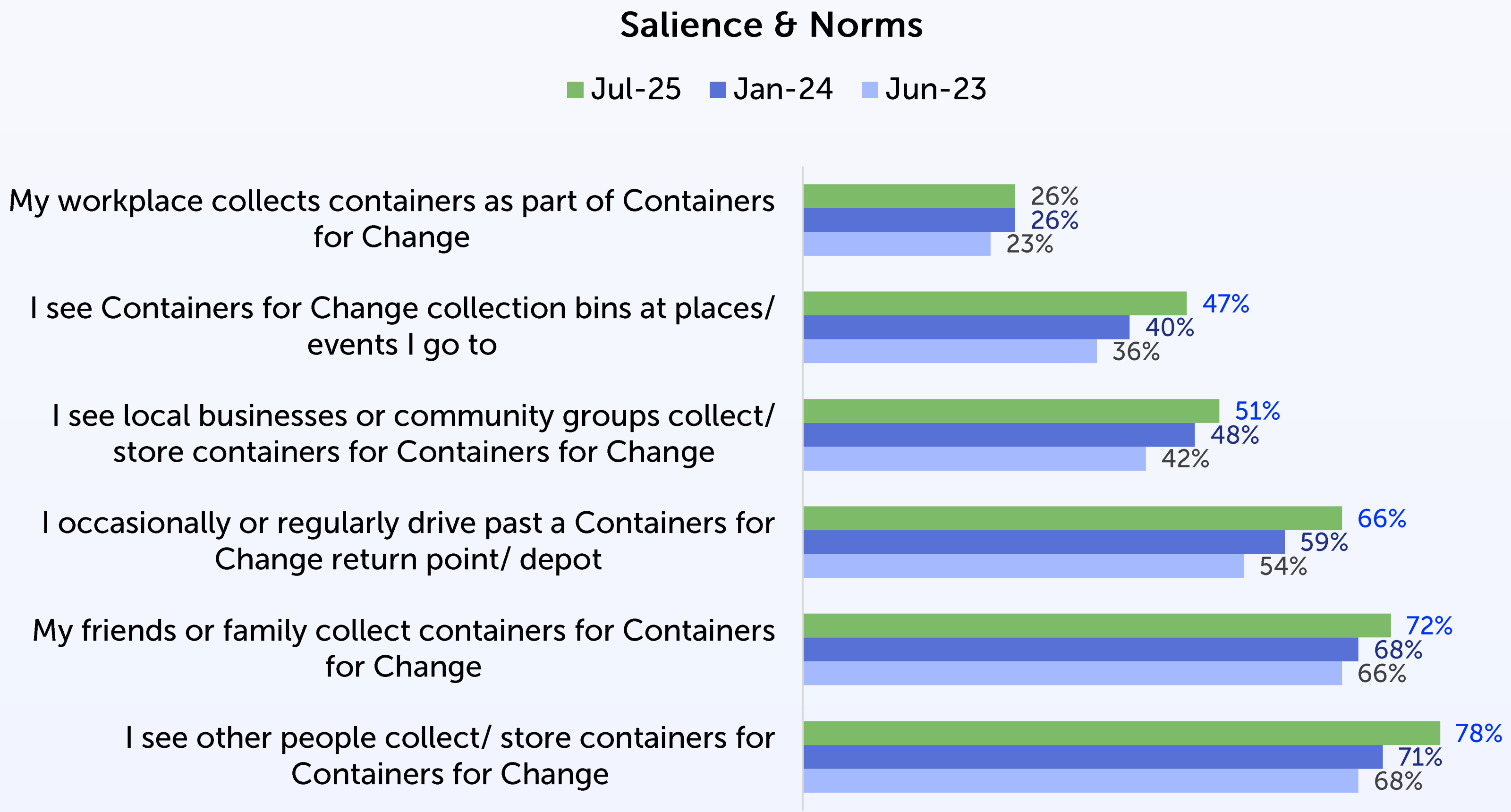
Container Exchange

Sig. differences +/- vs. other regions at 95% CI

Salience and norms

Salience (how important / noticeable the scheme is) has increased YoY, with people noticing others participating or seeing CRPs when out and about.

The only thing that hasn't increased is workplace involvement in the scheme.



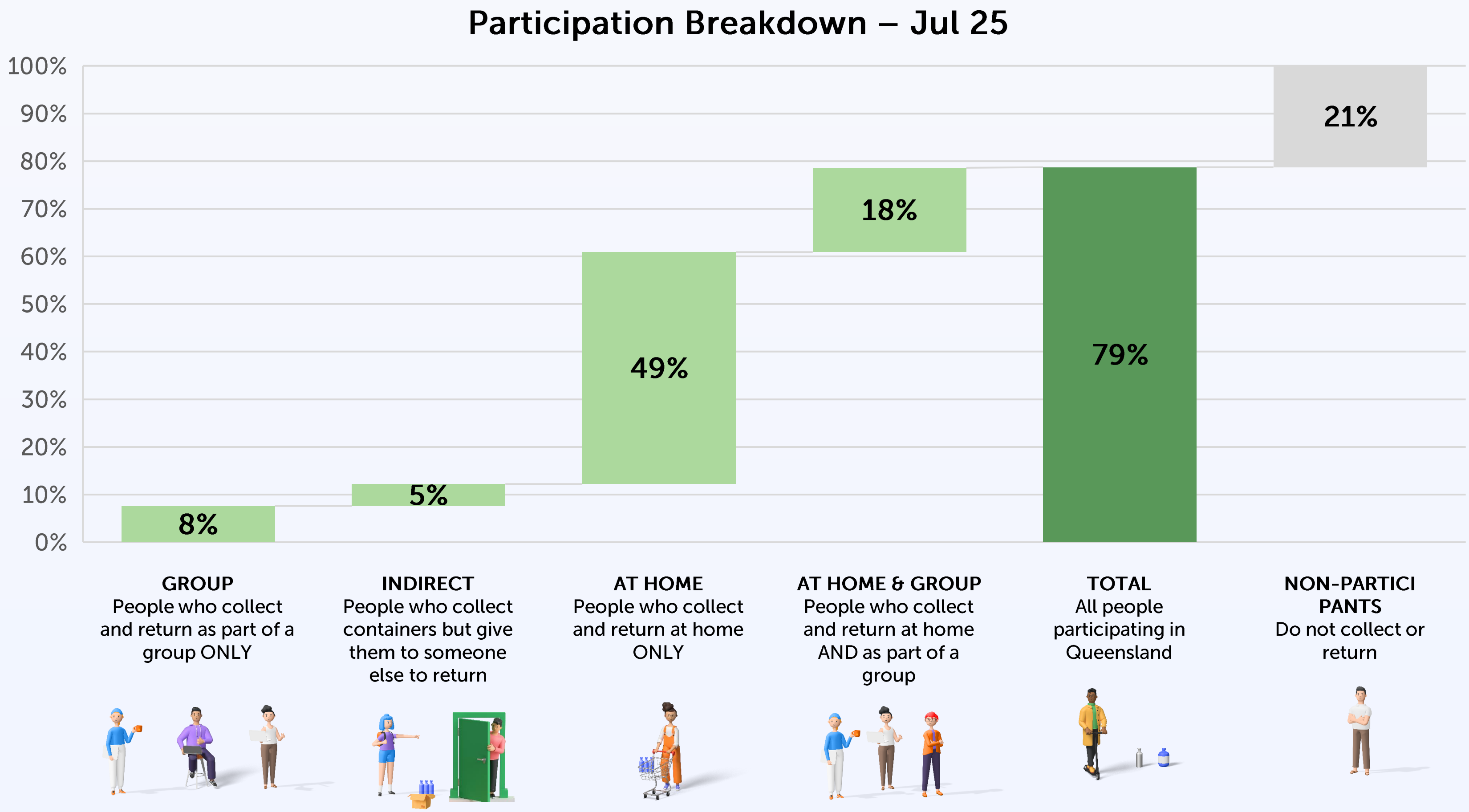
Container Exchange

Sig. differences +/- vs. other regions at 95% CI

Participation breakdown

Around half of Queenslanders are participating only at home, with another 18% returning at home AND as part of a group.

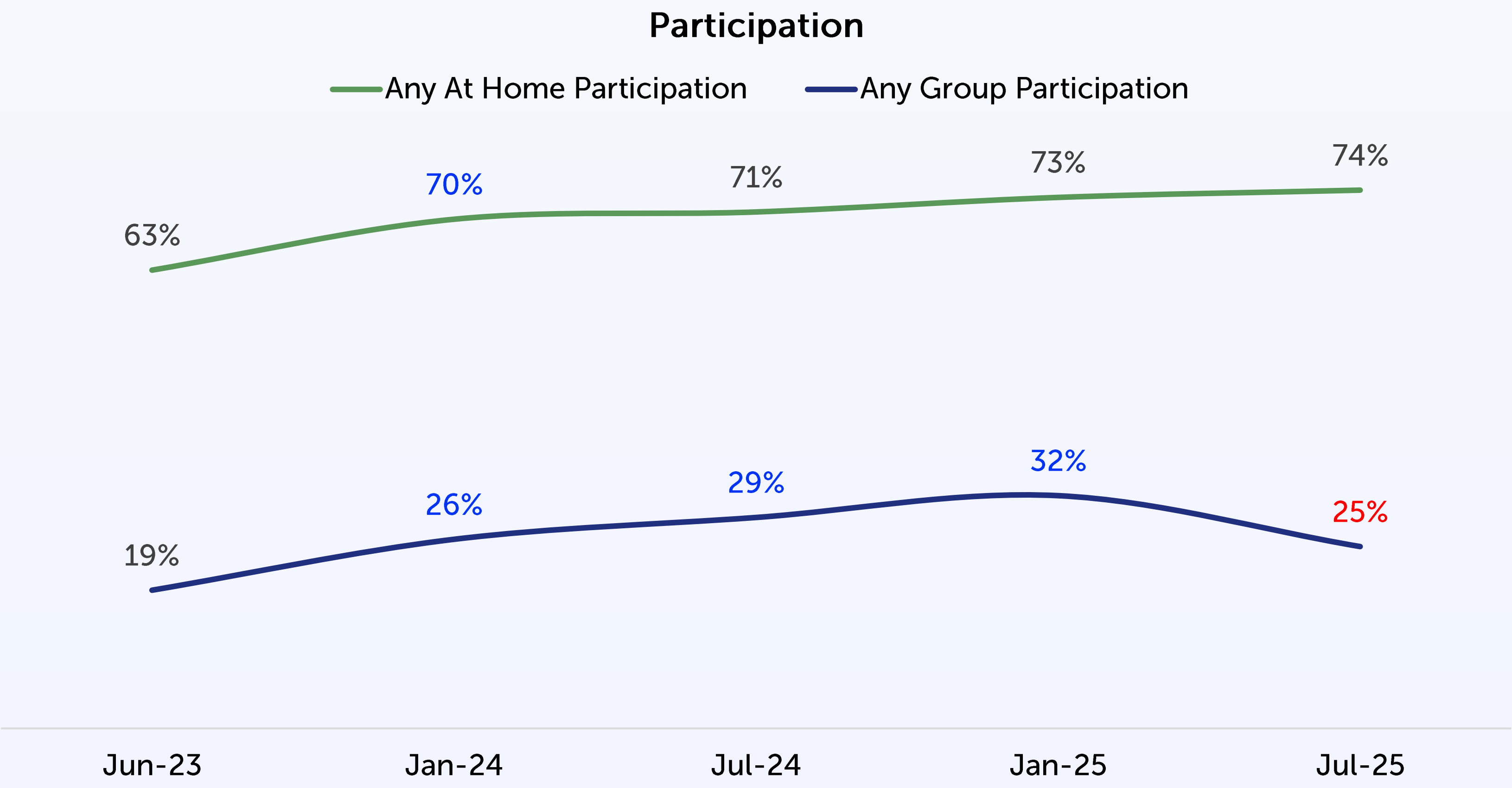
Around 5% of Queenslanders collect but don't return themselves; and a further 8% get involved with their group.



Changes in group participation

Queenslanders are moving away from group participation this wave, but are still taking part at home – total at home participation has not changed.

Group participation is dropping as less customers are saving their containers to give to a group or using an on-site bin when at a workplace, school or club.



Sig. differences +/- between waves at 95% CI

Things to consider

Growth can come from:

- **Existing customers participating in more ways** (e.g. through workplaces, schools, clubs etc.)
- And ***new customers*** coming on board. ~17% of people are open to participating but haven't yet.

COEX
Container Exchange

CONTAINERS FOR CHANGE

Customer segments

How are our different customer groups changing?

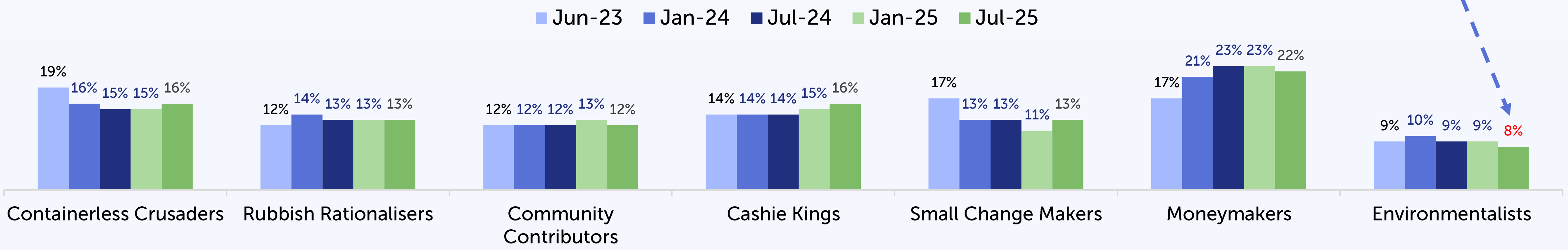
Our segments

	Containerless Crusaders	Rubbish Rationalisers	Community Contributors	Cashie Kings	Small Change Makers	Moneymakers	Environ-mentalists
Segment size	16%	13%	12%	16%	13%	22%	8%
	Less Engaged						More Engaged
Description	*Feel strongly about recycling and helping the environment, but use few containers*	*Know recycling's right for the environment, but everything's an obstacle or an excuse*	*Recycling sceptics who are keen to participate when others benefit, but are likely to use the yellow bin on their own*	*Young kings who are down for a bit of extra cash to play with, but are inconsistent recyclers*	*Everyday Queensland households, habitually seeking small ways to ease the costs of living*	*Families who make big returns for big money*	*Helping the environment is an essential part of their identity and activities – it's just the right thing to do*
Motivation	For the environment and to reduce landfill	Help the environment: it feels good and is the right thing to do	For charity and the community	Pocket money (for themselves) and the financial incentive	Get money for doing the right thing	For the money	To help the environment and doing the right thig
Barriers	Very low container use and yellow top bin usage	Lack of convenience, yellow top bin usage and lacking space	Someone else returns for me and yellow top bin usage	It takes a while to collect and inconsistent recycling habits	It takes a while to collect and lower container usage	**None**	**None**

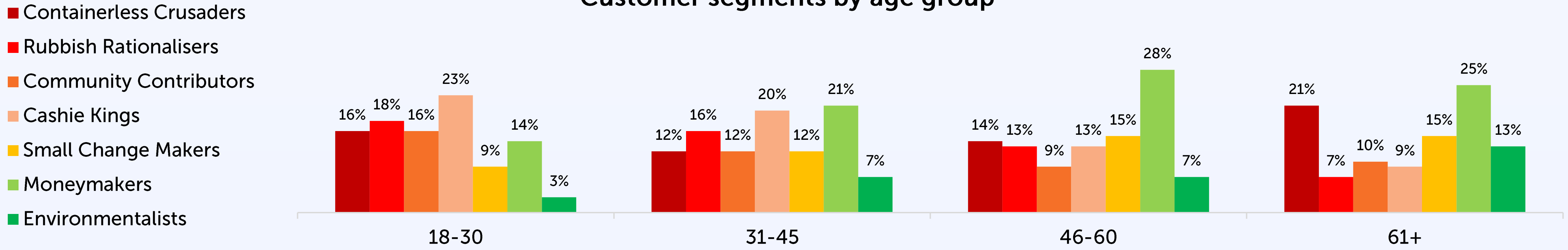
Changes in segments

Environmentalists are our most engaged and most likely to drive group participation and advocate for the scheme. It's a small decrease, but one to watch.

Changes in customer segments over time



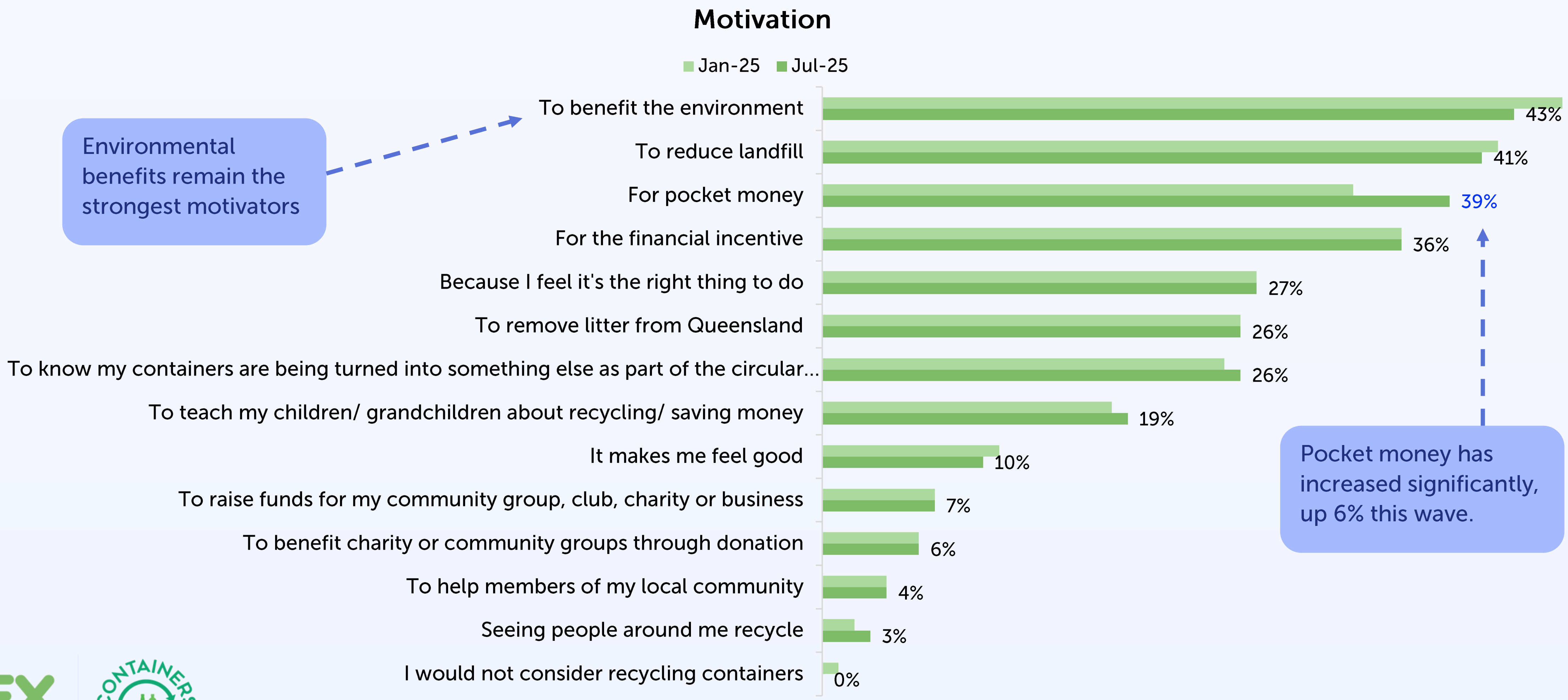
Customer segments by age group



Container Exchange

▲▼ Sig. differences +/- between waves at 95% CI

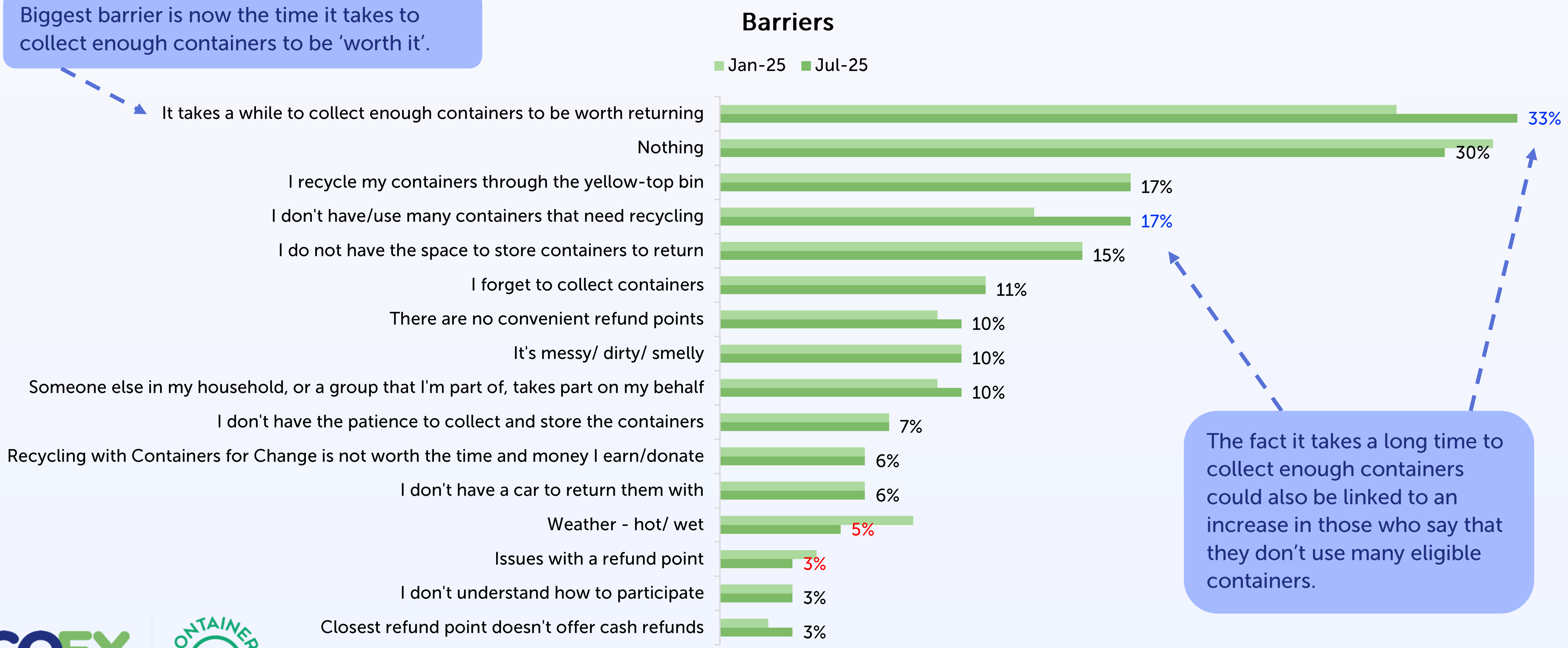
What motivates people to participate?



Sig. differences +/- between waves at 95% CI

What prevents people participating?

Biggest barrier is now the time it takes to collect enough containers to be 'worth it'.



The fact it takes a long time to collect enough containers could also be linked to an increase in those who say that they don't use many eligible containers.

▲▼ Sig. differences +/- between waves at 95% CI

Things to consider

Tapping into motivations and barriers can help convert people to action:

- Pocket money or a bit of extra cash to spend is rising in popularity as a motivation. What some ways to speak to these motivators and target these people?
- A top barrier is storage and the time it takes to build up a collection: what are some solutions that would work for your customer base?

COEX Container Exchange

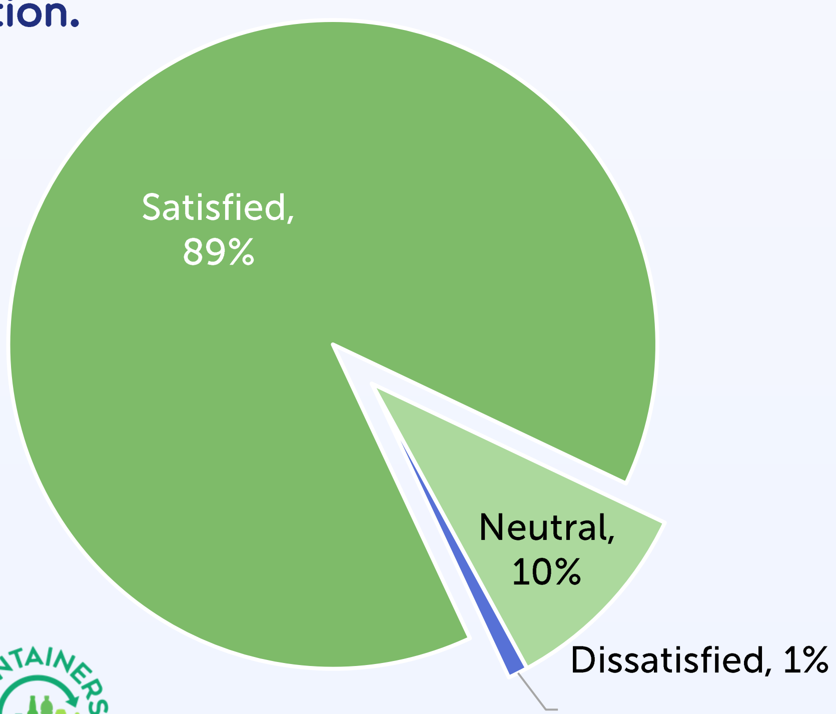
Containers for Change

Satisfaction & experience

How satisfied are customers with their experience?

Customer satisfaction

Overall customer satisfaction is high and holding steady, with 89% satisfaction and only 1% dissatisfaction.



What, if anything, could Containers for Change do differently to improve your experience?

"No suggestions, the facility is constantly improving in the way they work with customers and process the recyclables very quickly."

"Nothing, it's been great."

"Never had any problems."

"Nothing. I enjoy the whole experience."

Nearly half of customer comments were positive, saying that **no improvements are needed**

Container Exchange

What do people say we could do to improve?

Facilities and Processing

"The depots get very noisy. Not sure if there's a way to reduce any noise, or smells or clean off all the sticky residue."

"More processing options on weekends as the line can often be super long."

"Tap / facilities to wash hands."

"If the bottle scanning machine was faster and could sort things out just by dumping the bottles that would be cool"

Information

"The only thing I can think of is to make some of the eligible containers clearer. There are some small glass bottles (e.g., health shots) that have the 10c logo on the back but aren't accepted because they're under 150ml. I wasn't aware of that, and it took a couple of visits before one of the workers explained they couldn't count those."

"A bit more information about what to do at drop off sites"

Capacity and service

"Consistent customer service."

"More capacity at some depots and / or more depots as sometimes queuing times unacceptable."

"More recycling stations at each depot"

"Have sufficient staff on to handle the large number of cars(customers) driving through."

Bags and bins

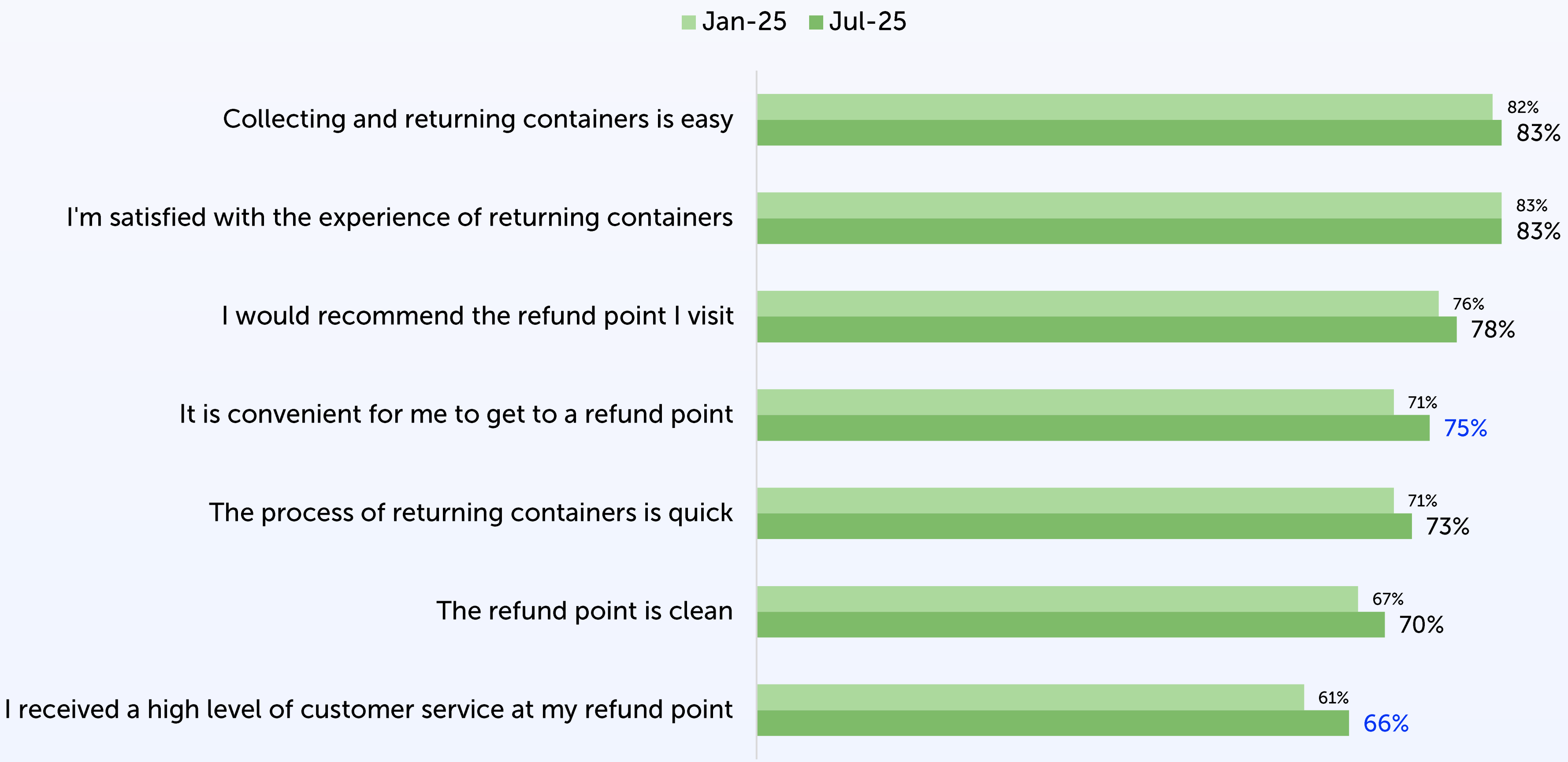
"Supply Bags or collapsible sealable bins to repeat customers who use pickup and drop off."

"Provide storage containers/ bags to hold items in."

Customer experience metrics

Customer experience metrics have lifted after an expected seasonal dip, with notable improvements in convenience and customer service.

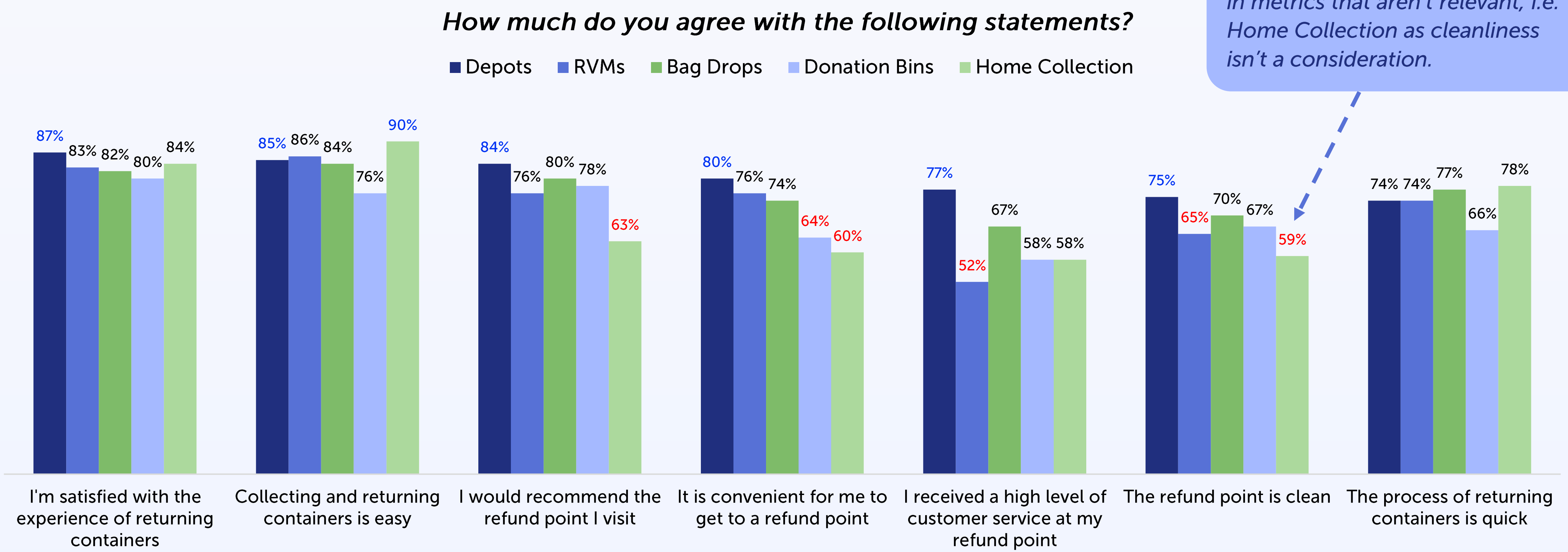
How much do you agree with the following statements?



Sig. differences +/- between waves at 95% CI

Customer experience metrics by CRP type

Note: Some channels score lower in metrics that aren't relevant, i.e. Home Collection as cleanliness isn't a consideration.

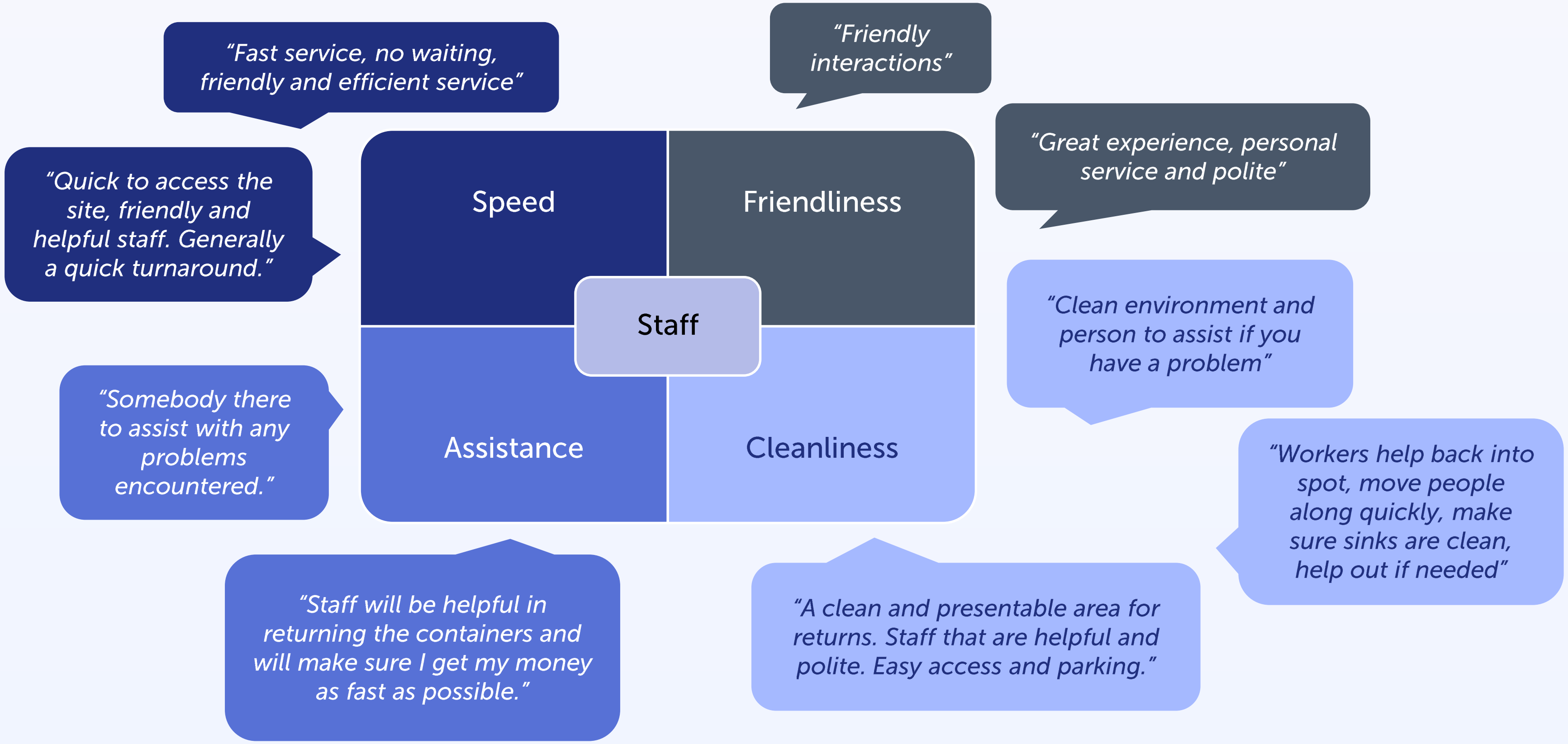


Sig. differences +/- tested vs the exception at 95% CI

What depot users say about good customer service

What does 'good customer service' mean to you when thinking about your container return experience at depots?

For depot users, good customer service is heavily centred around the staff and their ability to keep things clean and moving along, plus their willingness to help with a friendly smile.



Container Exchange

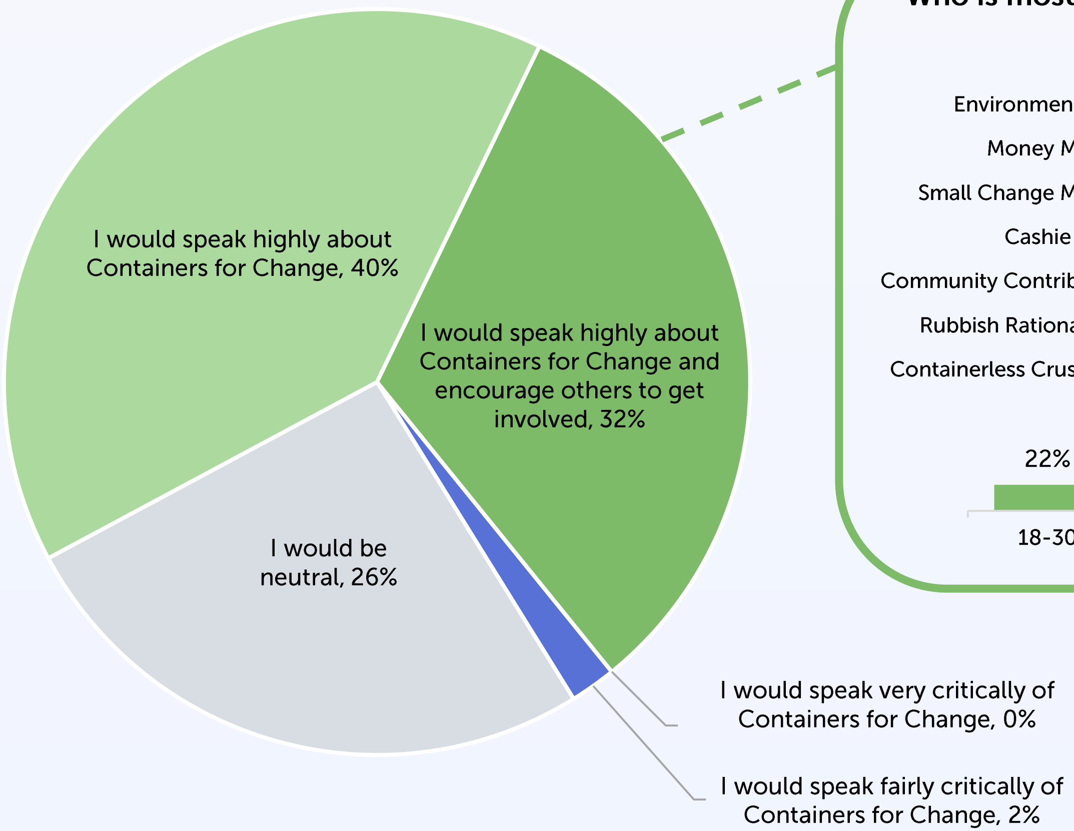
Advocacy and support

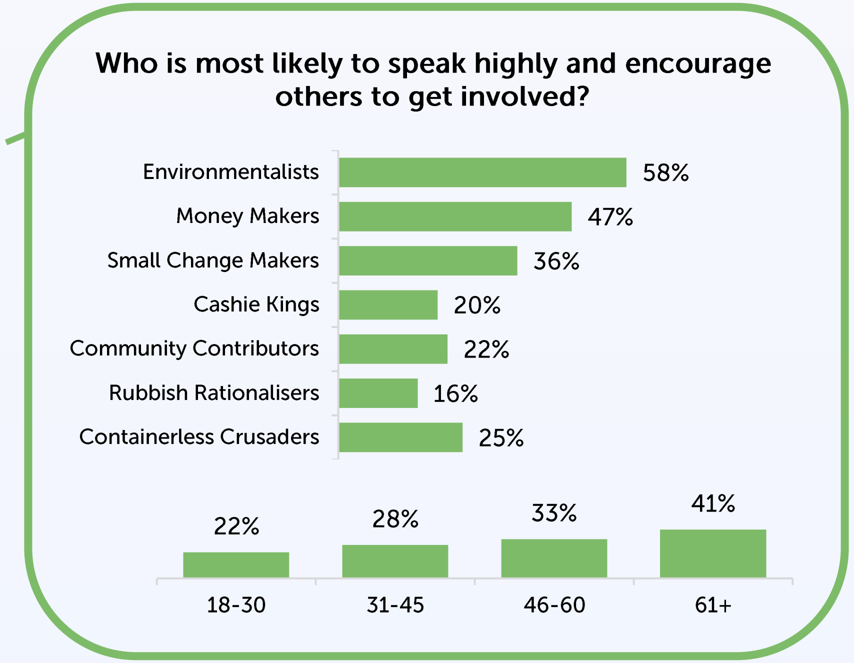
Advocacy of the scheme is strong.

Nearly three quarters of Queenslanders would speak highly of the scheme, and around a third would encourage others to take part.

The strongest advocates are *Environmentalists* and over 60s.

When speaking with others, how would you describe Containers for Change?





Things to consider

- Customer experience is the sum of all interactions people have. How can you optimise every touch point for great service?
- Feedback is a great way to find areas to improve in and areas working well. Take note of themes from Contact Centre calls, customer conversations and other sources.

COEX Container Exchange

CONTAINERS FOR CHANGE

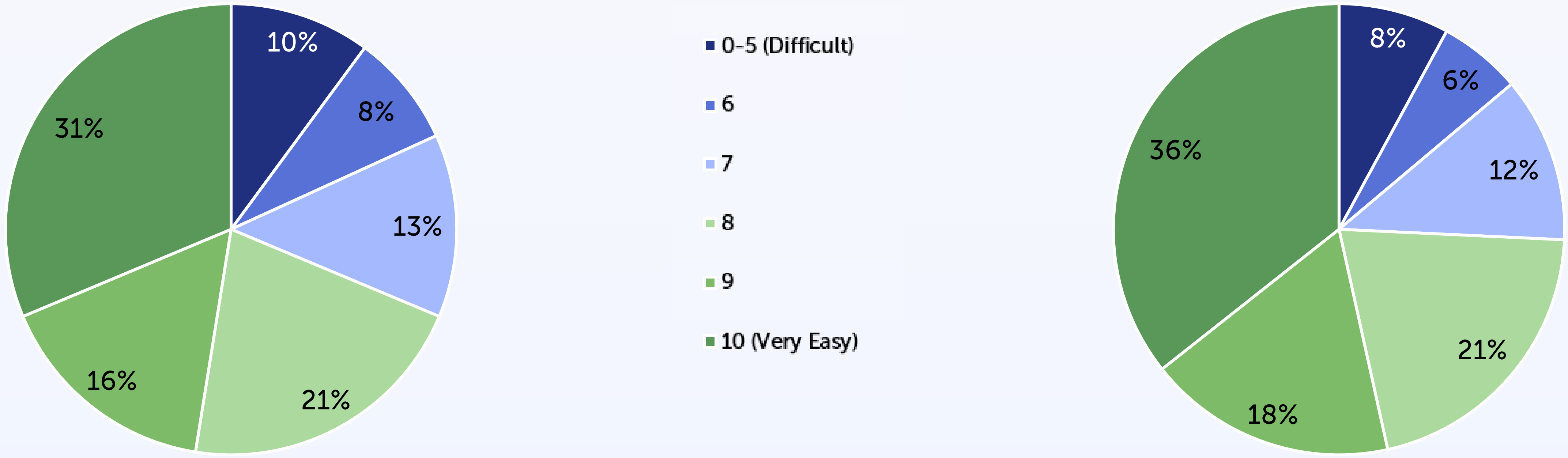
Ease of collecting and returning

How easy do people find it to take part?

Most people find the collection and returns process relatively easy. Overall, collecting containers is seen as *slightly* more challenging than returning them.

Ease Of Collecting

Ease Of Returning



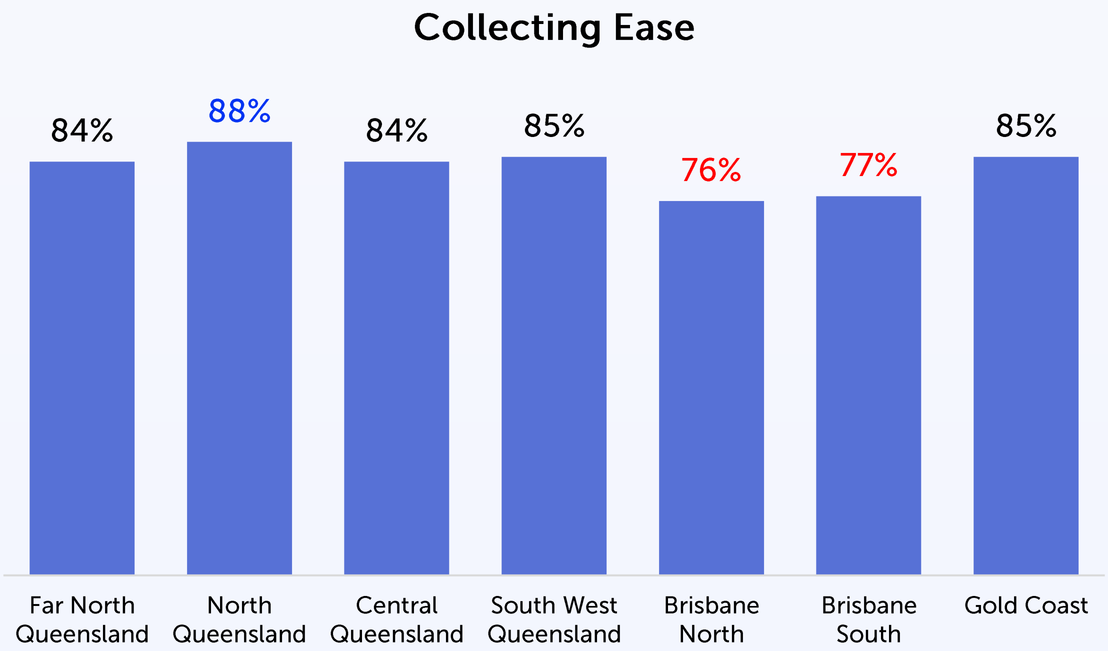
Collection Ease Score (7-10):
82%

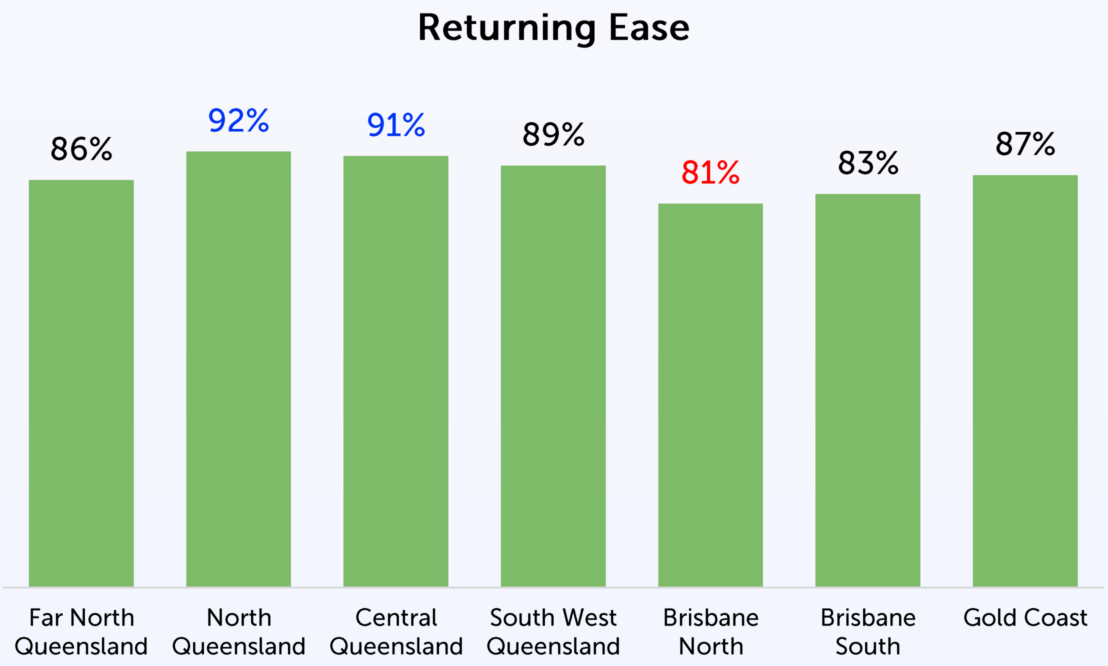
Overall Ease Score
(Avg. Collection & Return):
84%

Return Ease Score (7-10):
86%

Container Exchange

Regional differences in ease





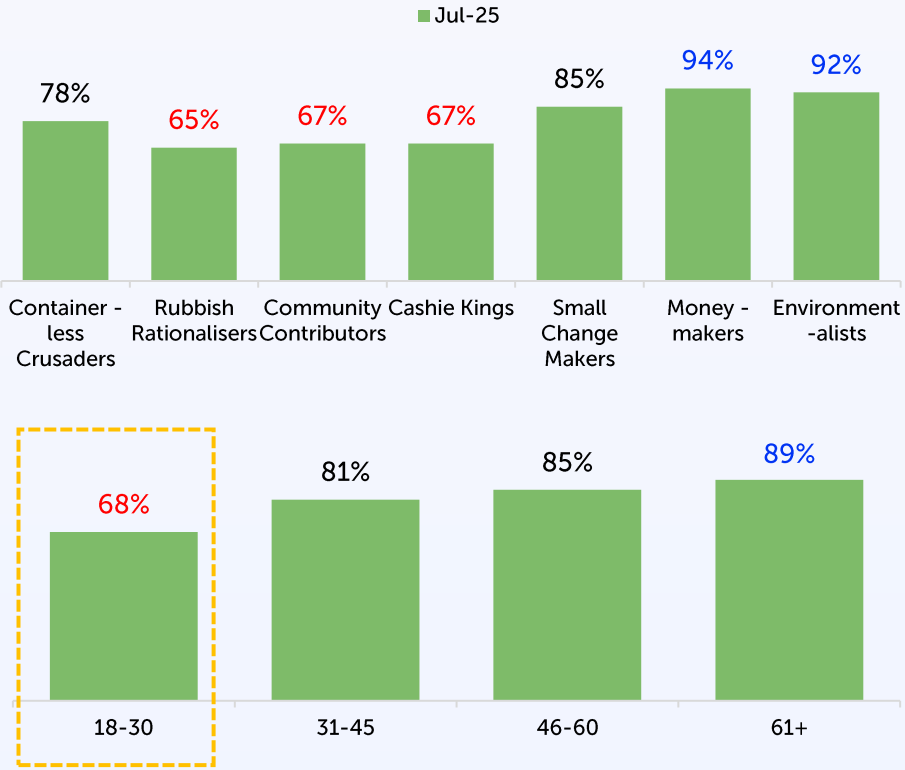
People in Brisbane metro areas are having the most trouble with collecting

People in North and Central QLD find returning the easiest.

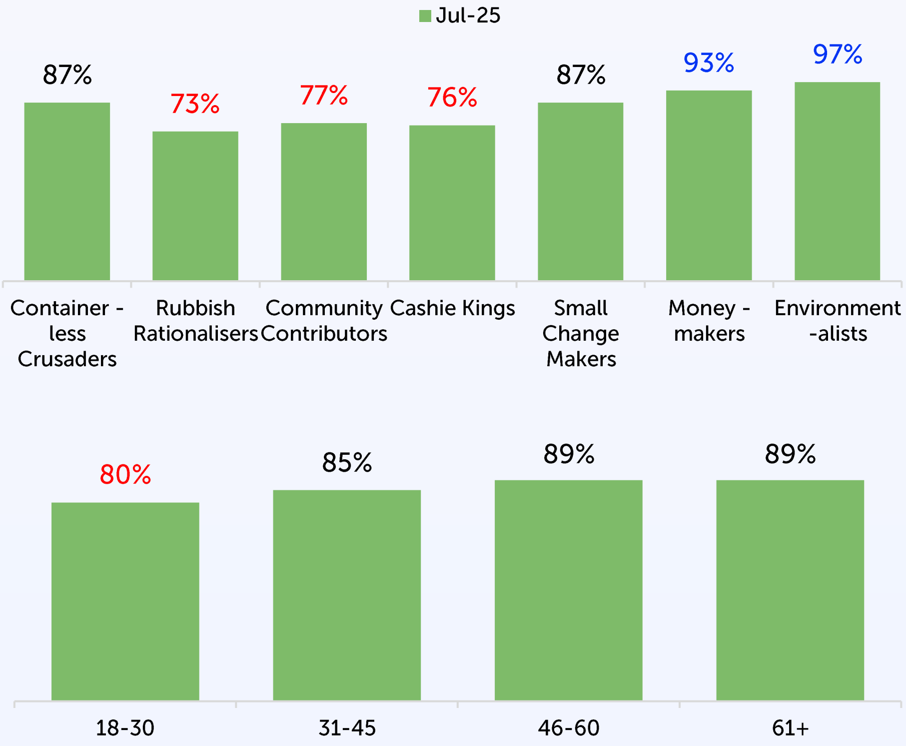
▲▼ Sig. differences +/- vs. other regions at 95% CI

Under 30's are finding both collecting and returning much harder

Ease of Collecting



Ease of Returning



Container Exchange

▲▼ Sig. differences +/- vs. the exception at 95% CI

Reasons people find collecting easy

Collecting Ease Reasons

Habitual & Simple	The collection process is easy It's second-nature; just a habit that people are in
Dedicated Storage	It's easiest when people have a dedicated space and system for storing containers

"It's become a habit for our whole family, kids are very good at seeing them when we are out too. So we feel like we are doing some good."

"It's very easy to just put the containers we use in our home into a bucket and once it's full I take it to the place to get refunded."

"It's not hard. You just need to organise the storage space and take them up when you've collected enough."

"I have a designated bin for my containers."

"I use many recyclable containers and have a dedicated space for them until I have enough to make it worth returning. It's fairly easy to collect all my used bottles and store them until I can return."

Reasons people find collecting difficult

"It's easy to collect but hard to store and cans stink." [18-30]

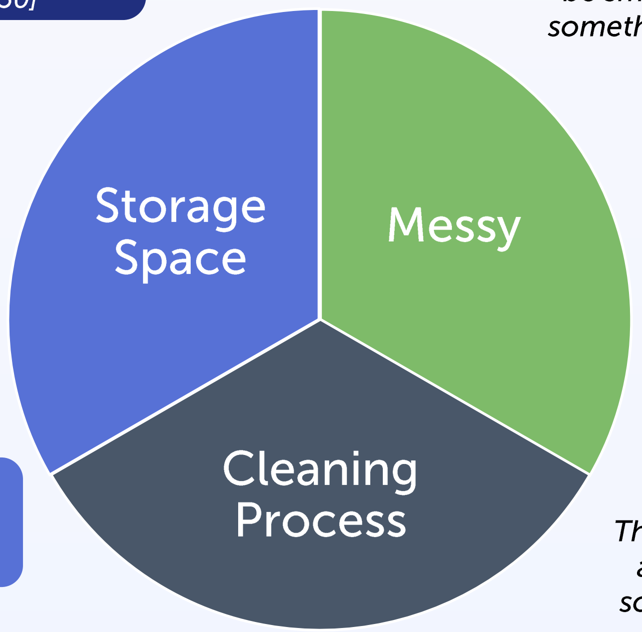
"I have 2 babies and I have cans lying around the house all the time or outside. The babies get into them and I normally have to pick them up every day." [18-30]

"I have a small house so there's not a lot of room to store them and I like to collect enough before I drop them off."

Finding the space to store collected containers is a challenge for many, particularly young people

"I don't have space to store them, hence I give them to my neighbour."

"Hassle of storing them until I go to depot."



Many find their collections to be smelly and messy – not something they want in their home

"I find the storage an issue as well as the messiness."

"It's messy, can still attract ants and cockroaches even after cleaning, gets mouldy in FNQ."

"Cleaning can be a chore and we have to take lids off."

There is potentially some confusion around the level of cleaning and sorting needed. Some also find the need to remove lids annoying.

"Sometimes I can't be bothered. I'd rather just chuck it all in a bag and donate rather than clean, remove labels, crush, remove lids etc."

"Cleaning out the containers can sometimes be annoying."

COEX Container Exchange

CONTAINERS FOR CHANGE

Reasons people find returning easy or difficult

Reasons returning is easy

"We pull up, unload the containers, the machine counts them, receipt is produced and cash is given."	*The process is simple and easy for most*	Efficient Process
"The staff are friendly and all the instructions are simple and easy to follow."	*The staff on hand make the process more positive*	Helpful Staff
"The place where we take the containers isn't very far away and you don't have to wait that long to deposit them."	*There are lots of locations that are easy to get to, and home collection is helpful for many*	Accessible

Reasons returning is hard

Queues	*Queues and delays can be problematic*	*"Too often there's a long line up at the depot I used to use. So long I'll leave and come back another day/time. Can be very frustrating."*
Issues & Hassle	*When machines are faulty or full this causes frustration*	*"The RVMs are always broken or full, so we have to go out of our way to return them at a depot."*
Inconvenient	*For those without a car, returns can be difficult, and opening times are sometimes a challenge*	*"There's nothing really close to me and I don't have a car to access the depots."*

COEX Container Exchange
CONTAINERS FOR CHANGE

P10h What are your main reasons for giving that score?
Base: Jul 25 n=1,801

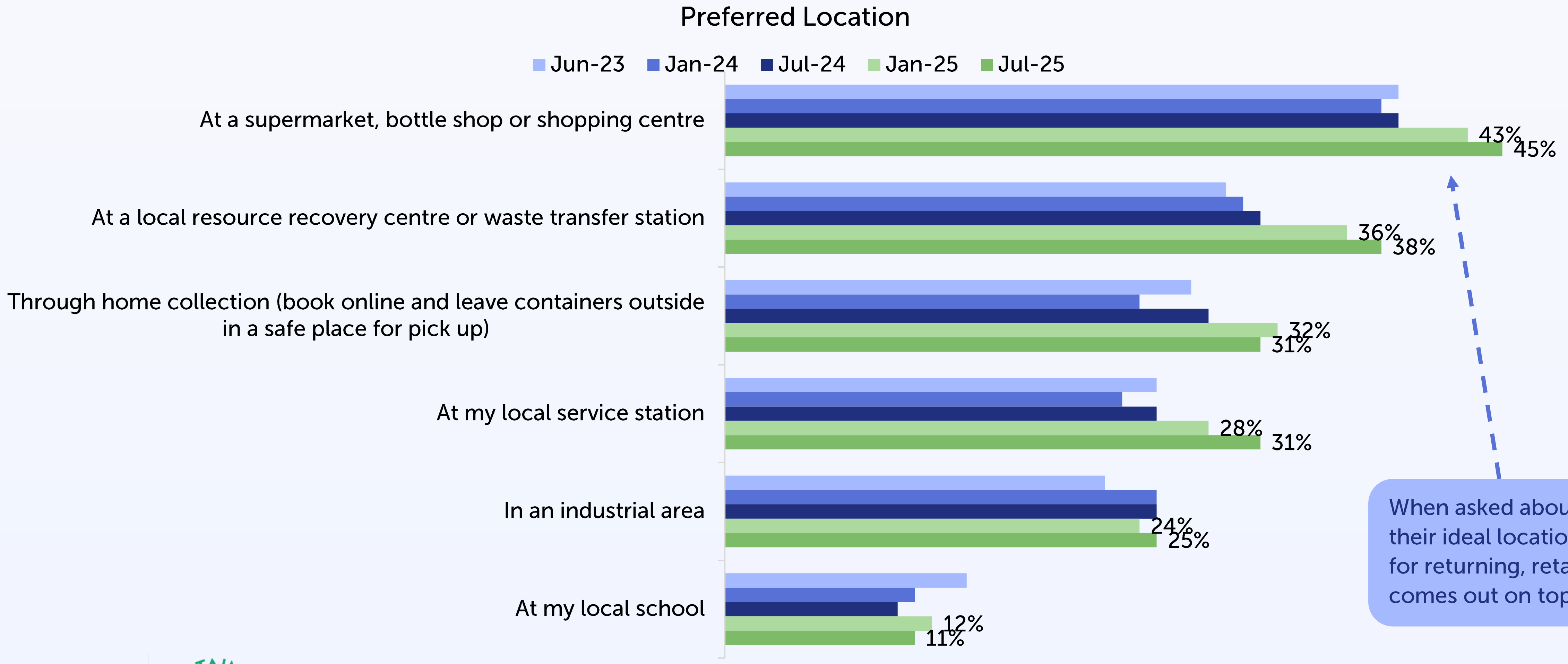
Things to consider

- Participating in the scheme requires more than one action.
- What are the ways you can minimise friction for customers at the collection stage, as well as the return stage?

Return trends & preferences

How do people return and what refund options do they choose?

Preferences in location



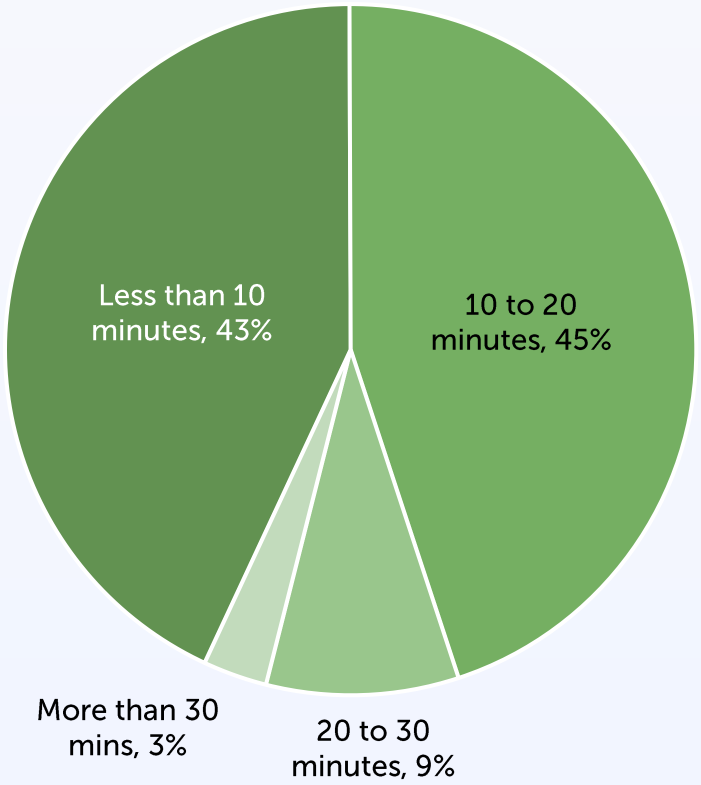
When asked about their ideal location for returning, retail comes out on top.

Sig. differences +/- between waves at 95% CI

How far people are happy to travel

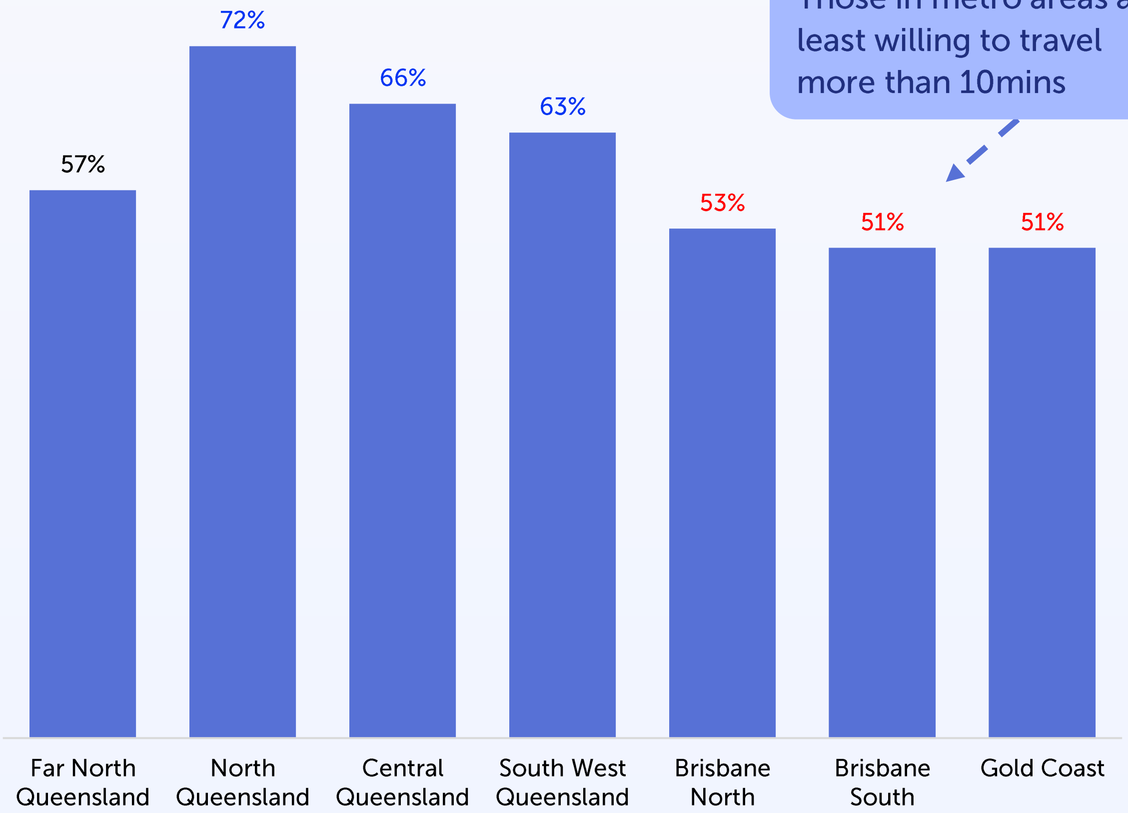
Majority of people wouldn't be willing to travel more than 20mins to a CRP.

Number of minutes willing to travel



Willing to travel more than 10mins

Those in metro areas are least willing to travel more than 10mins

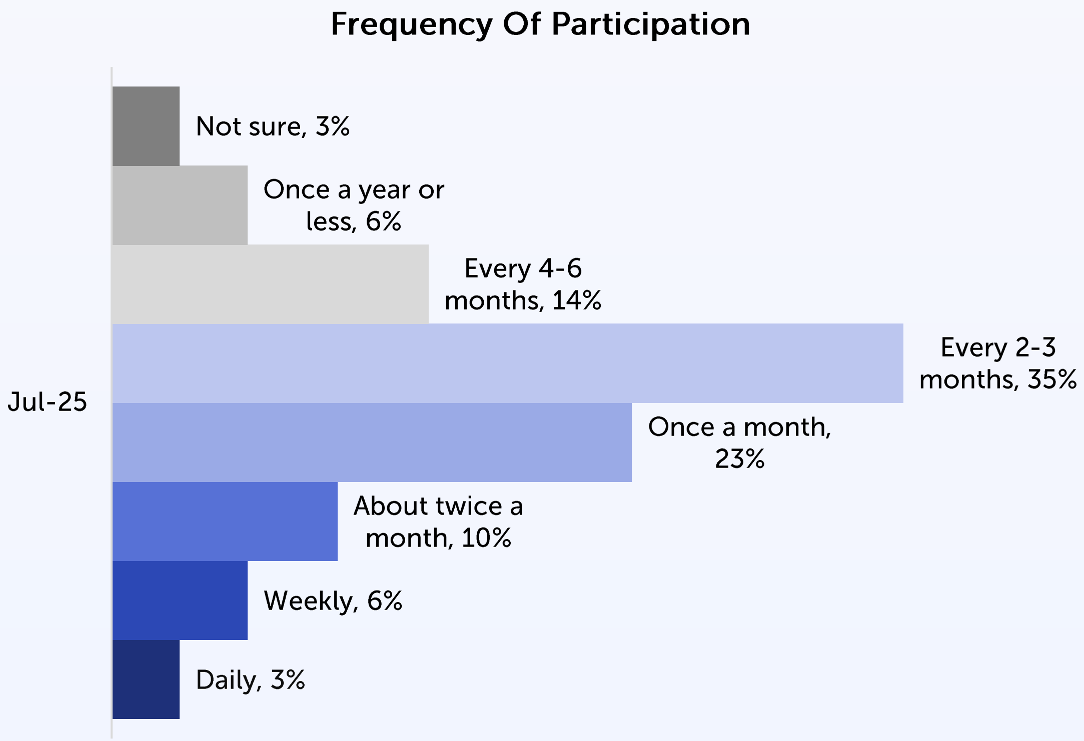


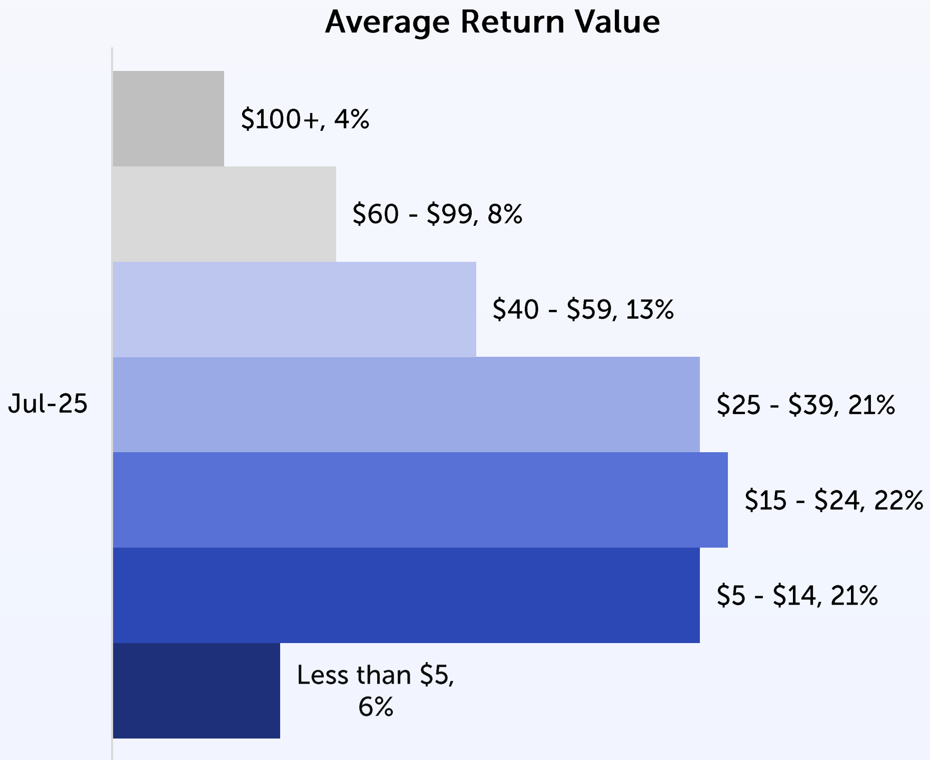
Container Exchange

CONTAINERS FOR CHANGE

Average return frequency and amount

On average, people are returning 3-4 times per year, for a refund of approx. $25

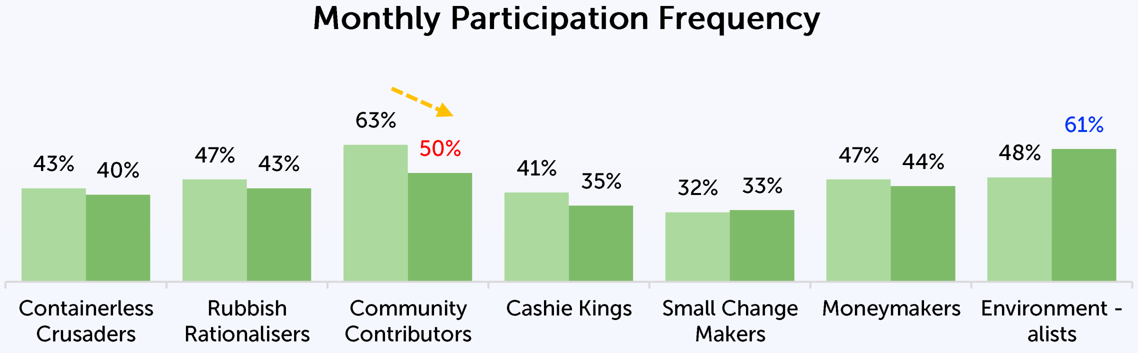


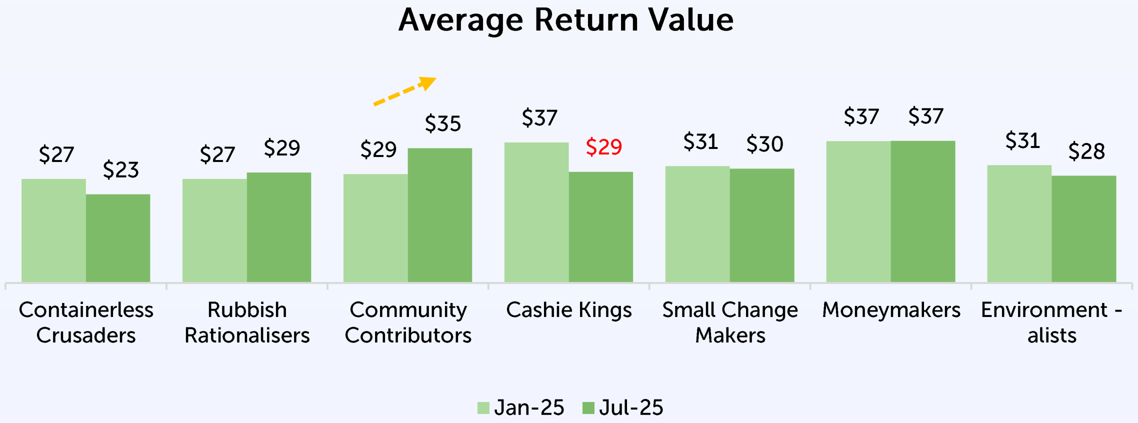


Differences by segment

Participation frequency has decreased amongst Community Contributors (who are using the red bin the most).

Cashie Kings return value dropped, using fewer containers in winter.





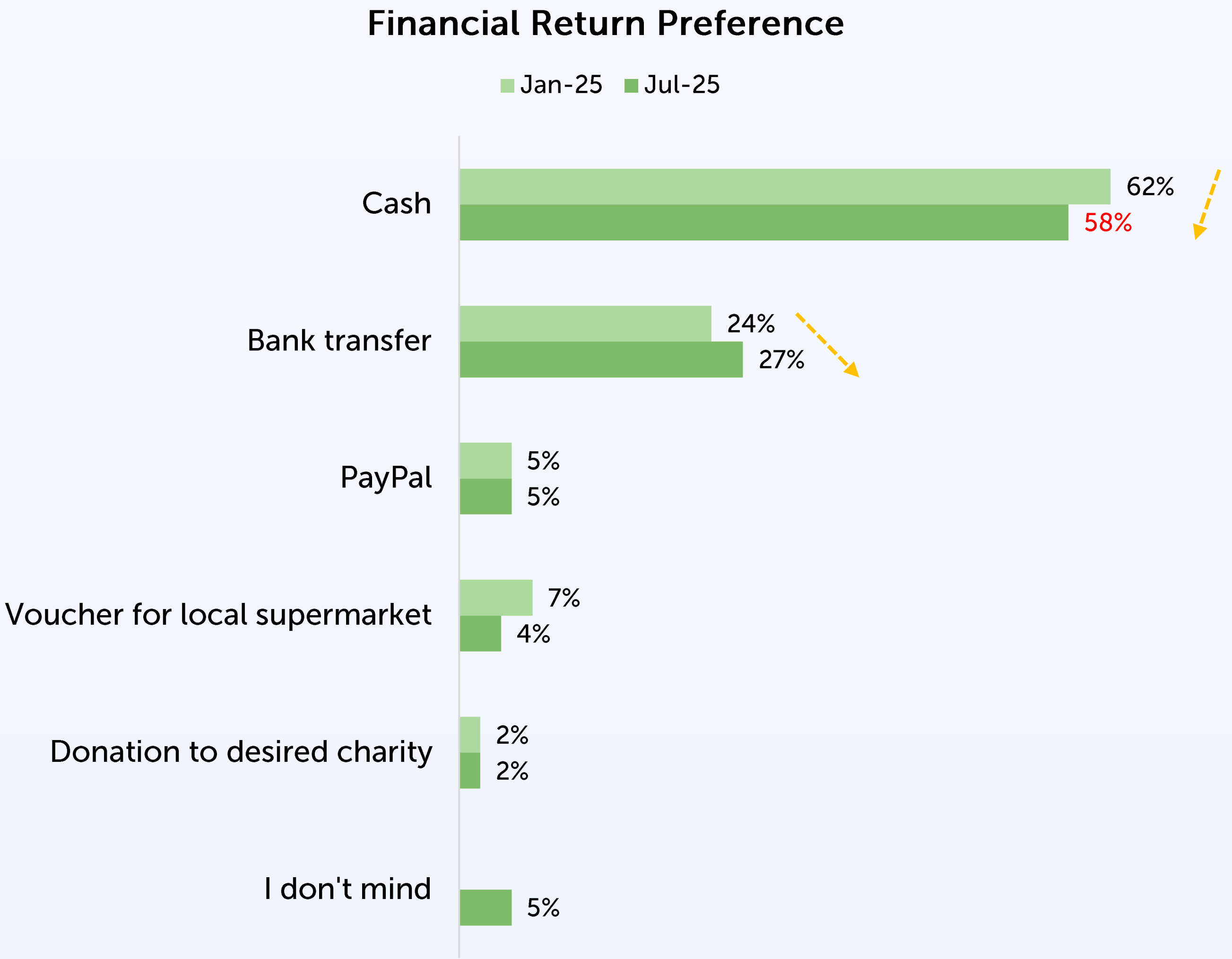
▲▼ Sig. differences +/- between waves at 95% CI

Preferences for refund type

Preference for cash has decreased this wave, although is still the most popular choice.

Over a quarter of people prefer a bank transfer, steadily increasing wave on wave over the past 2 years.

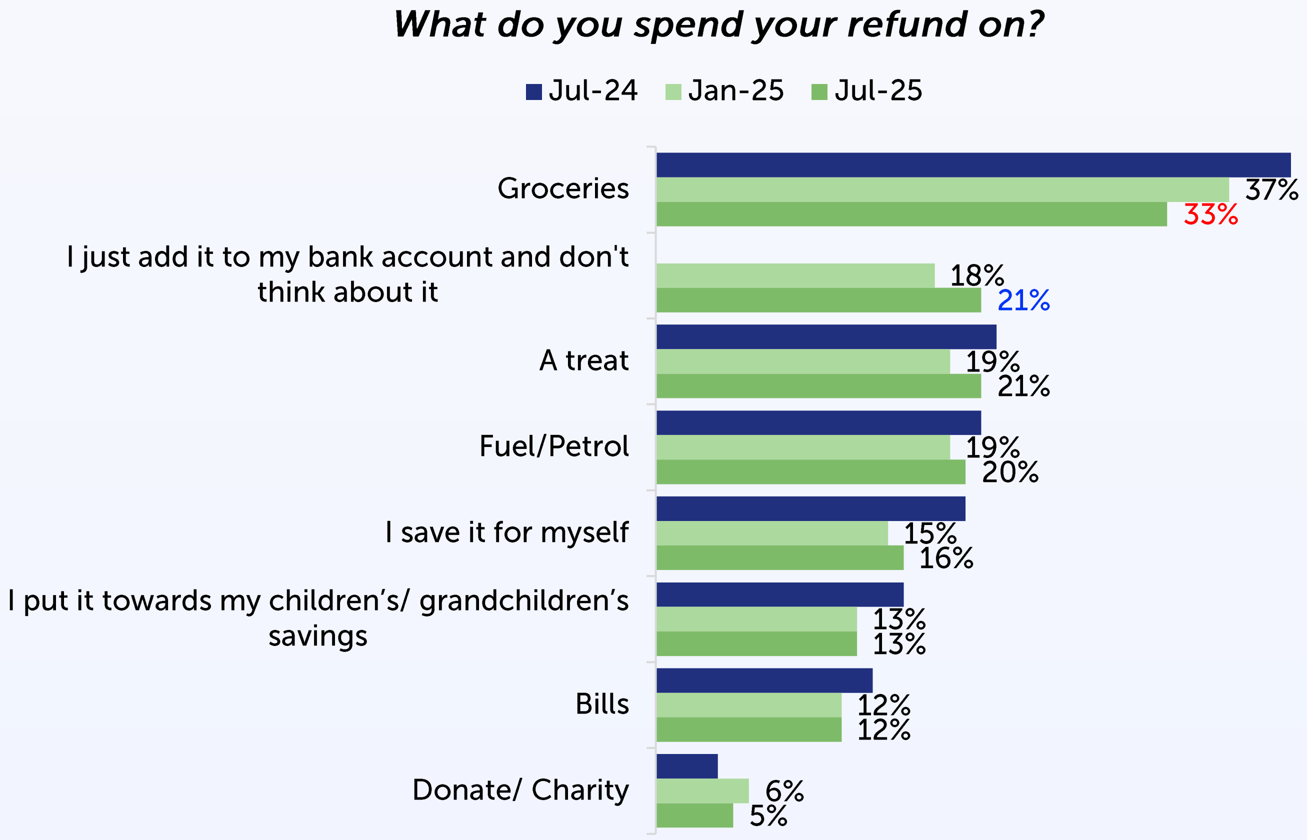
EFT payment is also the main reason people sign up for a Member Number.



Container Exchange

Sig. differences +/- between waves at 95% CI

Refund spending



People are less likely to be spending their return on groceries this wave; 1 in 5 are simply adding the money to their bank account.

- **18-30s** most likely to use return for groceries/fuel
- **31-45s** most likely to use return for children/ grandchildren's savings
- **Over 60s** most likely to add return to their bank account

- **Containerless Crusaders** most likely to add return to bank account
- **Community Contributors** most likely to use return for fuel
- **Environmentalists** most likely to donate their return

Container Exchange

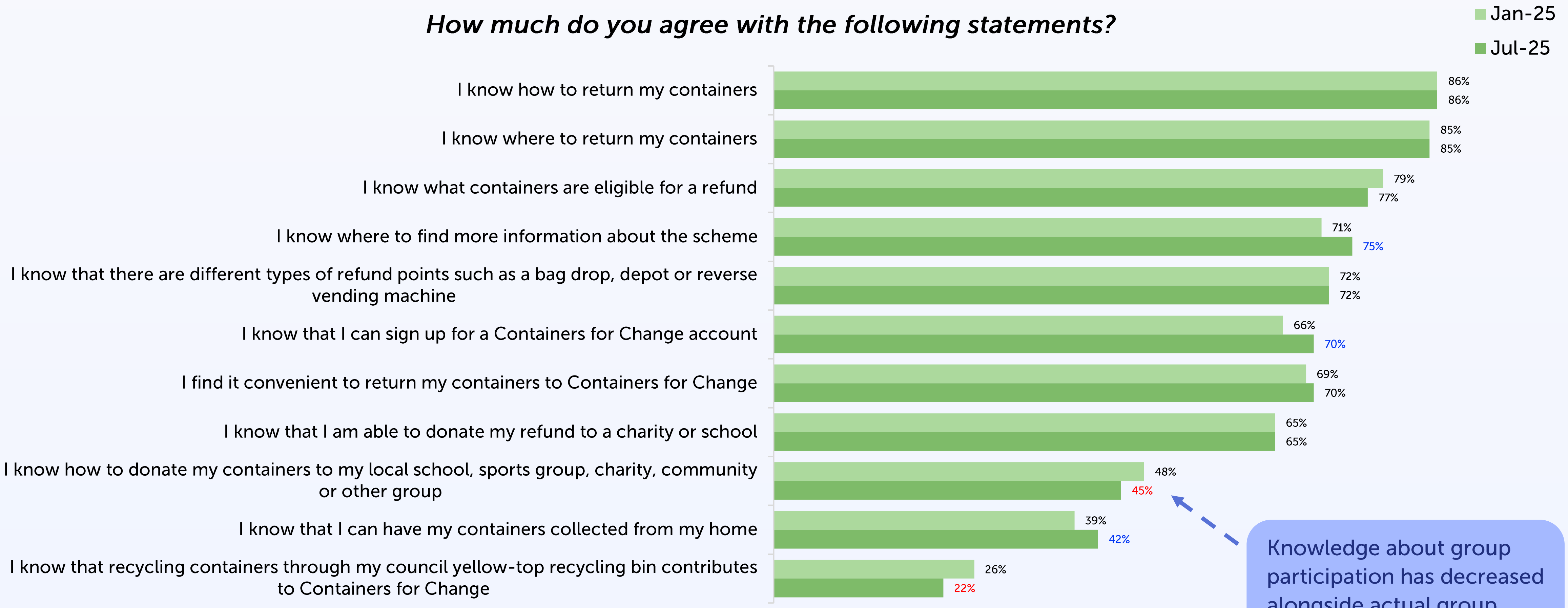
Sig. differences +/- between waves at 95% CI

Knowledge & confidence

How well do customers understand key information?

Customers' knowledge and confidence

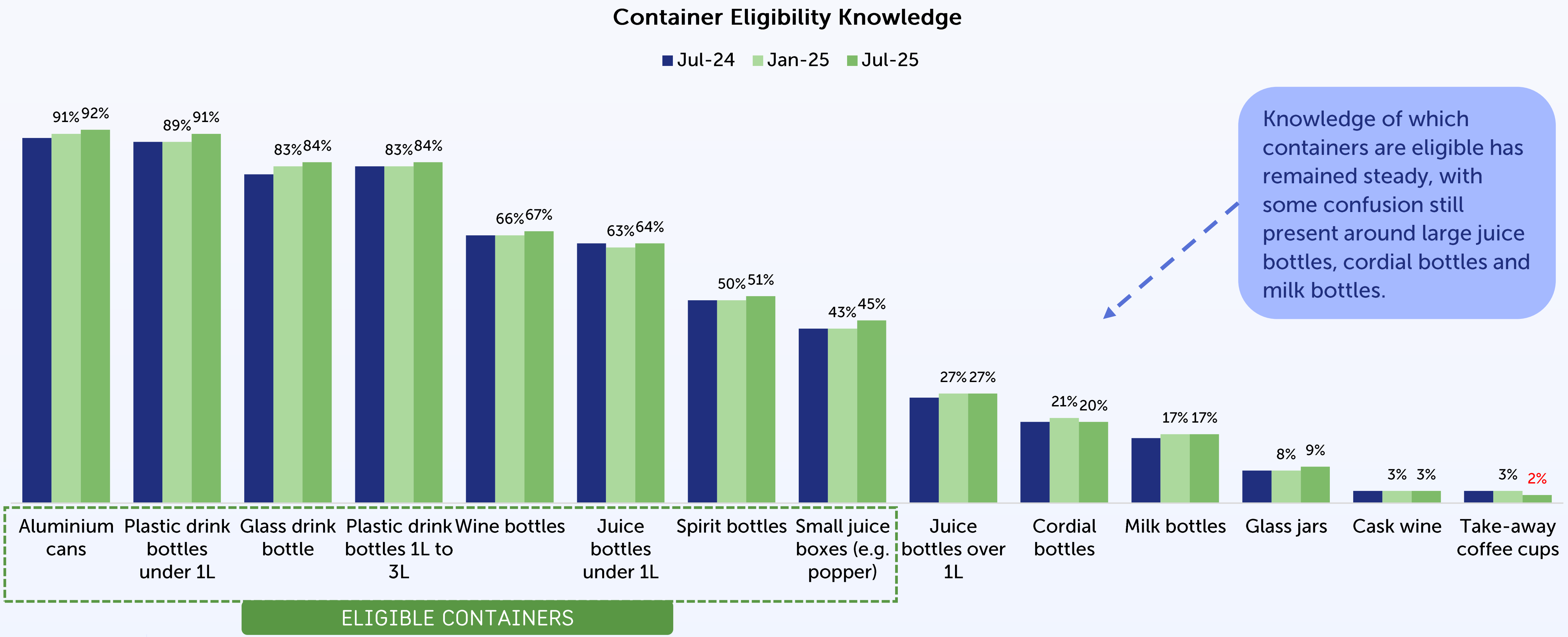
How much do you agree with the following statements?



Knowledge about group participation has decreased alongside actual group participation.

Sig. differences +/- between waves at 95% CI

Eligibility knowledge



Knowledge of which containers are eligible has remained steady, with some confusion still present around large juice bottles, cordial bottles and milk bottles.

Sig. differences +/- between waves at 95% CI

Things to consider

- Knowledge is lowest when it comes to donating, home collection and participating as a group.
- If you offer these services, how might you boost education and build customer confidence to participate via these methods?

Container Exchange

Got further questions?

Connect with the CX team!

Gemma Boucher

Customer Experience Manager

Jennifer Haig

Research & Insights Lead

COEX
Container Exchange

Containers for Change