Mid-2025 Customer Survey

Operator Pack – South-West QLD

October 2025

Southwest Queensland
Key Metrics

80%

Participate at home

+6% vs 74% Queensland NET

74% collect & return

6% collect but give to others to return

23%

Participate with a group

-2% vs 25% Queensland NET

3% are responsible for the group's participation

20% give containers to the group in some way

92%

Aware of the brand

+1%vs 91% Queensland NET

89%

Would recommend the scheme

+1% vs 88% Queensland NET

COEX Container Exchange

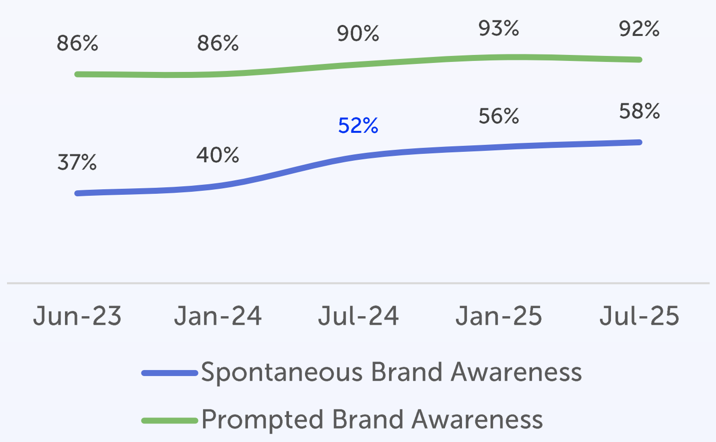
CONTAINERS FOR CHANGE

Significantly more than or less than Other Regions at 95% CI

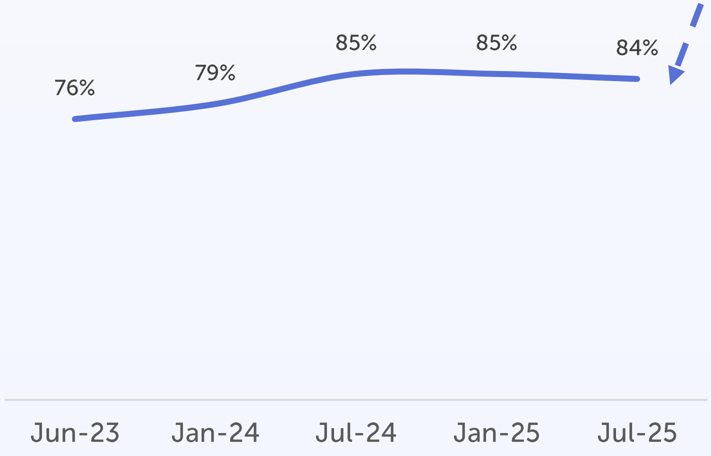
Southwest Queensland
Key Metrics Longitudinal Trends

Southwest QLD continues to have higher participation rates compared with other regions and QLD NET, second only to North and Central QLD (tied at 86%).

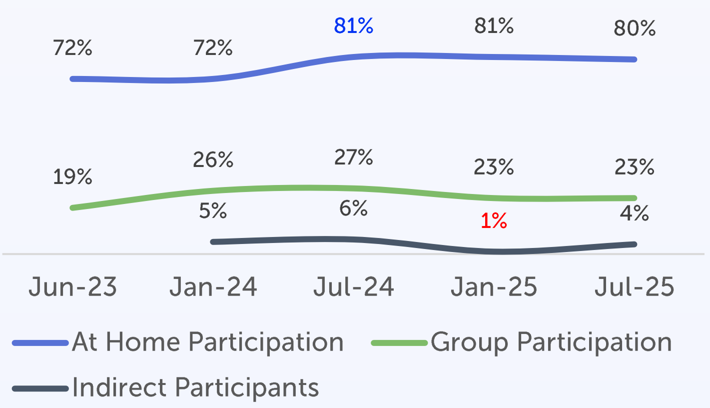
Awareness



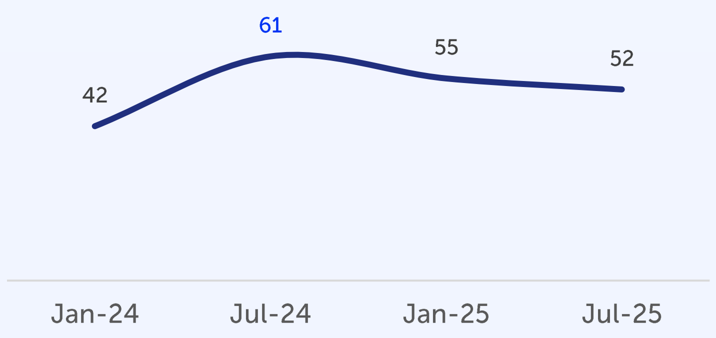
Total Participation



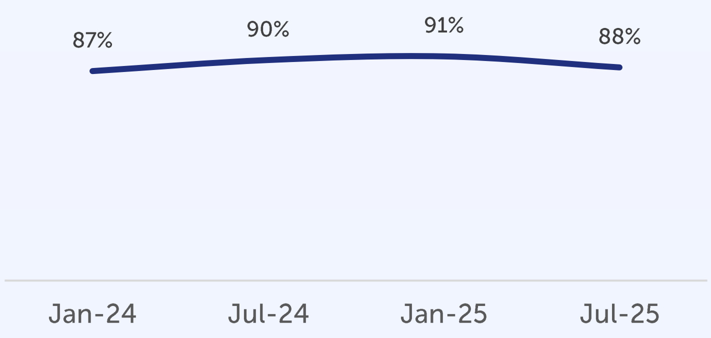
Participation Types



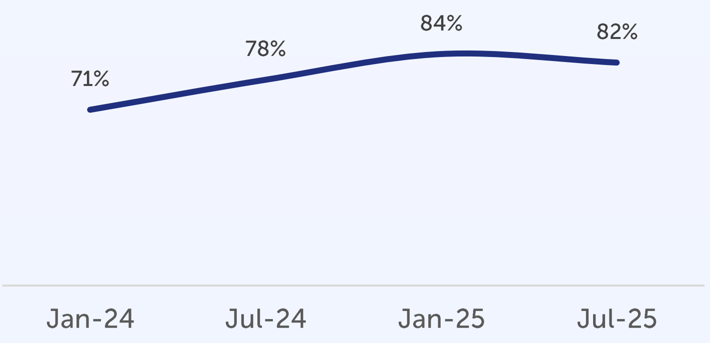
NPS



CSAT



Trust



Significantly more than or less than previous wave at 95% CI

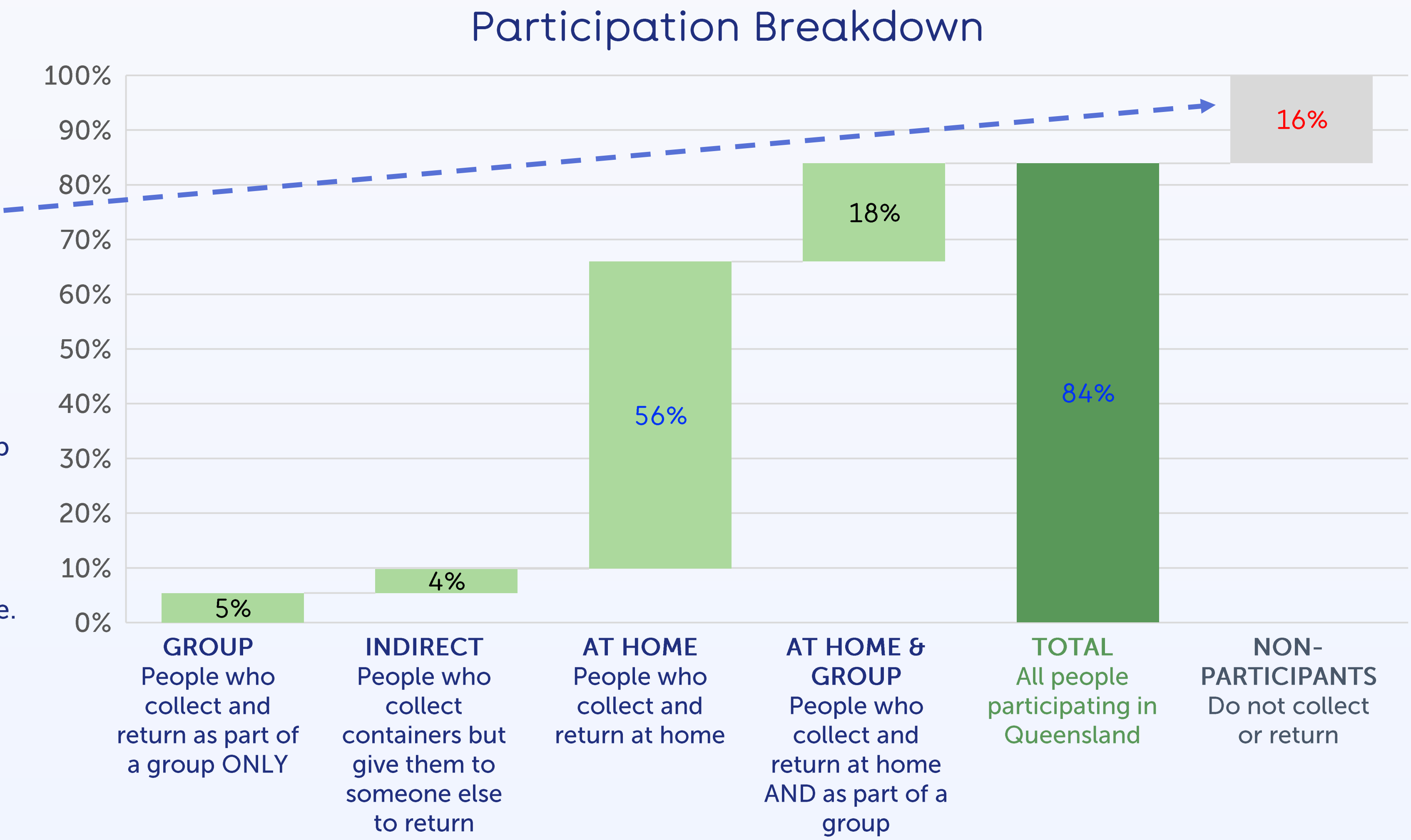
Southwest Queensland

Participation Breakdown

Opportunity size: ~11% of customers are either unaware of the scheme or open to participating but haven't yet. Within Southwest QLD, 5% are firm rejectors.

Southwest participation: *At Home Only* participation is higher than other regions, contributing to an overall higher total participation rate. Unlike other regions, group participation has remained stable rather than decline.

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



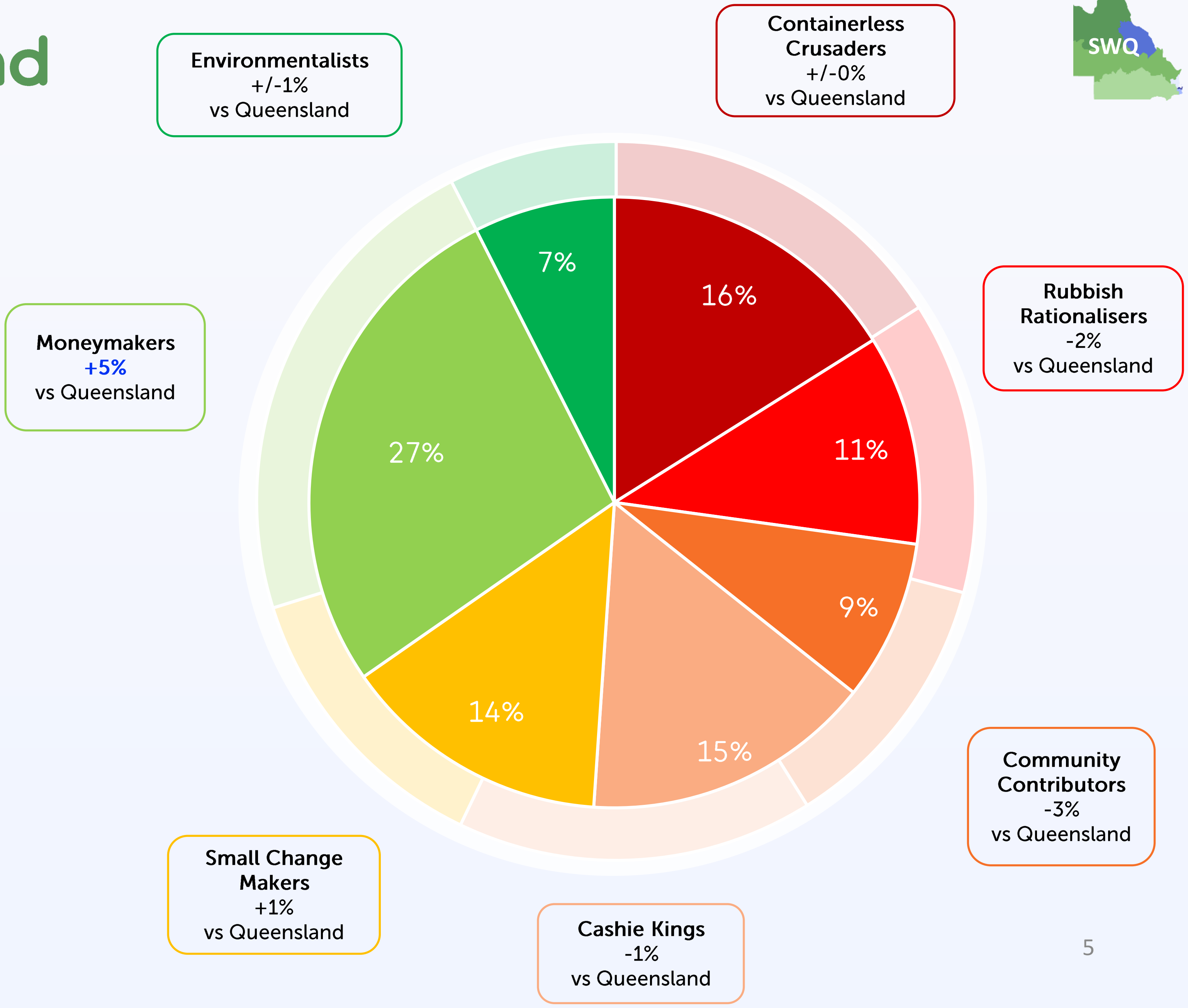
Significantly more than or less than Other Regions at 95% CI

Southwest Queensland
Customer Segments

Southwest customers are more likely to be *Moneymakers* (motivated by financial reasons, with few barriers to participation).

Other customer motivations and barriers align broadly with rest of state.

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

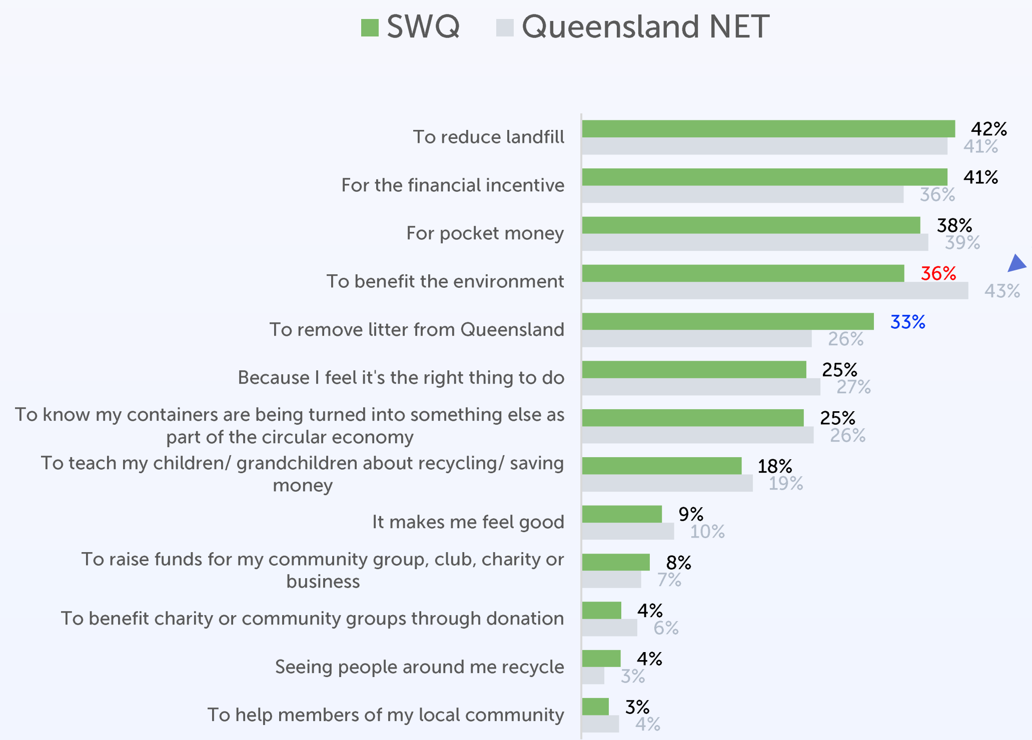


Significantly more than or less than Other Regions at 95% CI

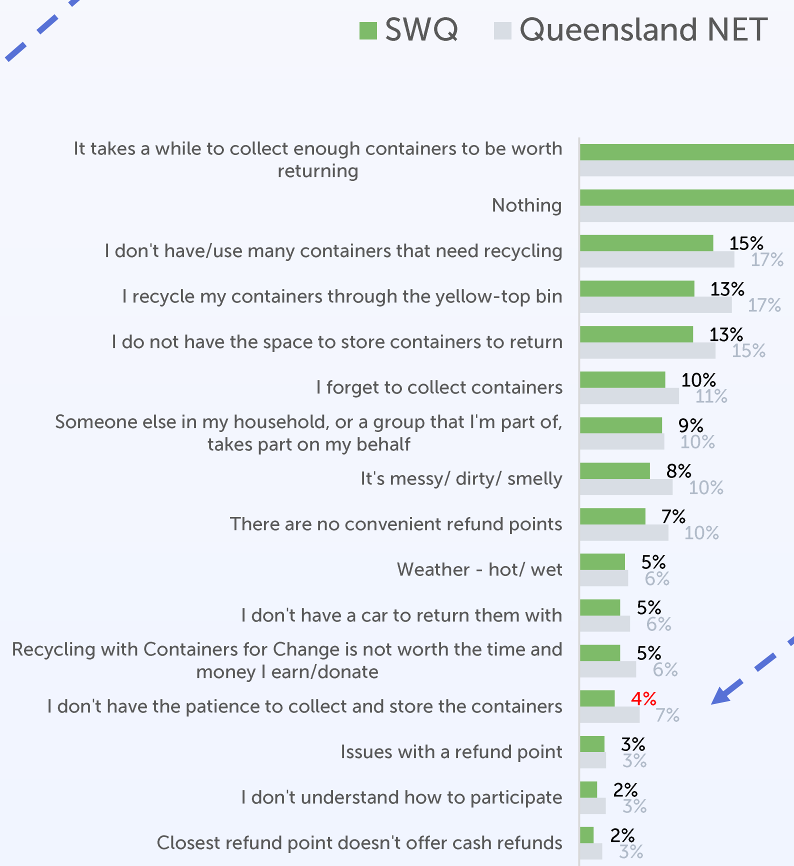
Southwest Queensland
Why do/ don't people participate?

Compared to other regions, Southwest Queensland are more likely to be motivated by the financial incentive, aligning to the larger numbers of *Moneymakers*. They're also more likely to be motivated by reducing litter, and less likely to cite environmental benefits as a driver.

Motivations



Barriers



Patience in collecting and storing containers is also less likely to be seen as a barrier.

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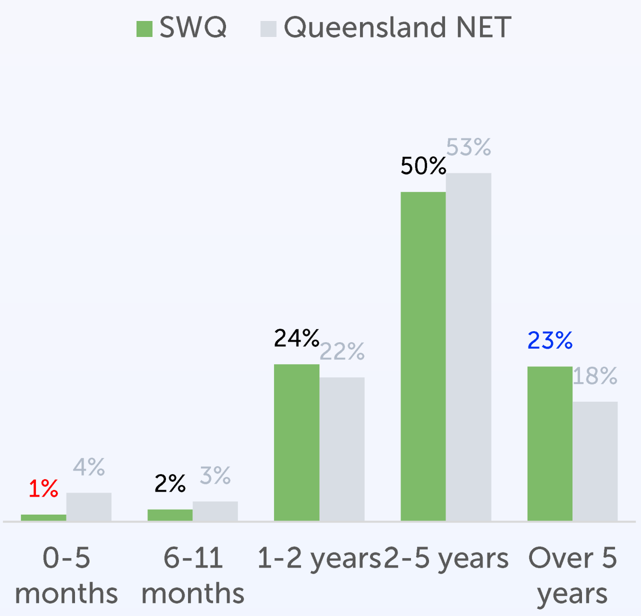
Southwest Queensland
How is the experience?

Tenure



Experience

Feedback

"It's a quiet depot I take them to. The people get them out of your car....very quick"

"The team are attentive and helpful. Aware of when customers are arriving and may need help with a trolley or loading bags into the bin for counting"

"It's a good service and it is saving a lot of stuff going into ground filling."

Southwest Queensland has the highest proportion of long-term participants (23% over 5 years), tied with Central Queensland. It also has significantly fewer new participants from the past six months compared to other regions.

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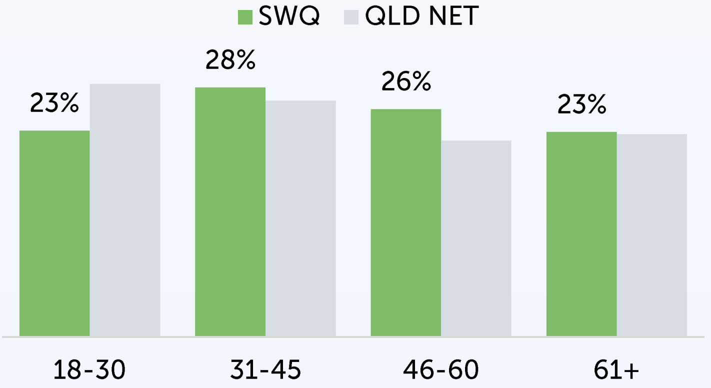
CONTAINERS FOR CHANGE

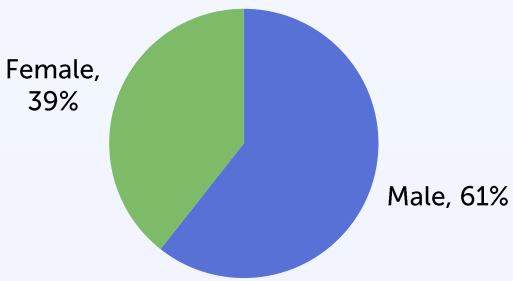
Significantly more than or less than Jan 25 Other Regions at 95% CI

Southwest Queensland
Not yet participating, but open to it

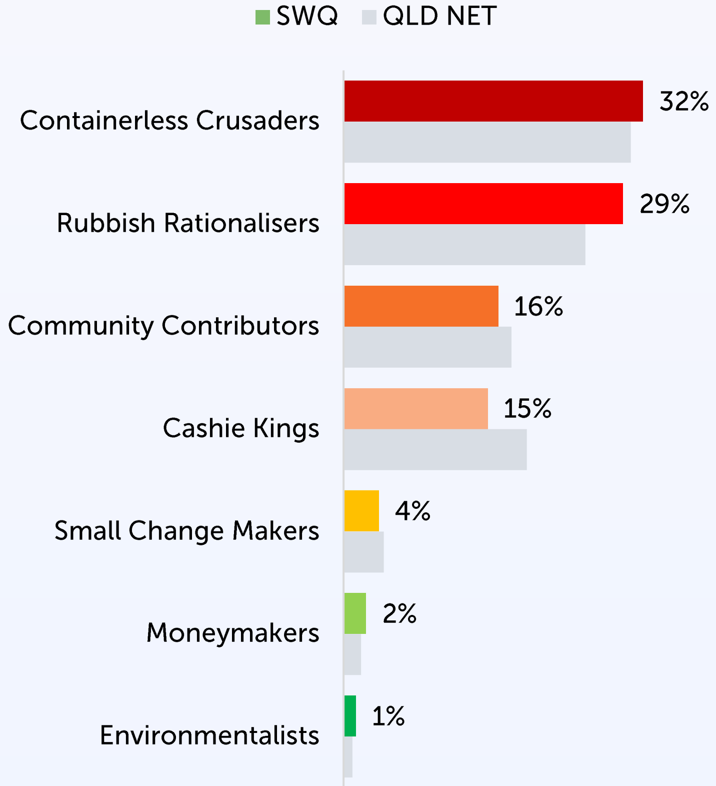
Potential customers are more likely to be Men aged 31-45, whose biggest barrier is the time it takes to collect enough containers to be worth it.

Age & Gender

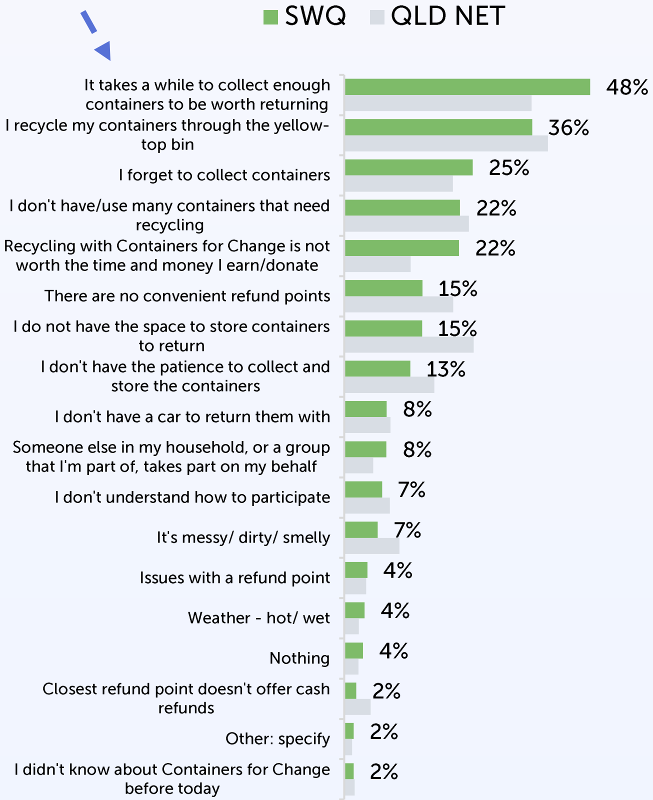




Segment



Barriers



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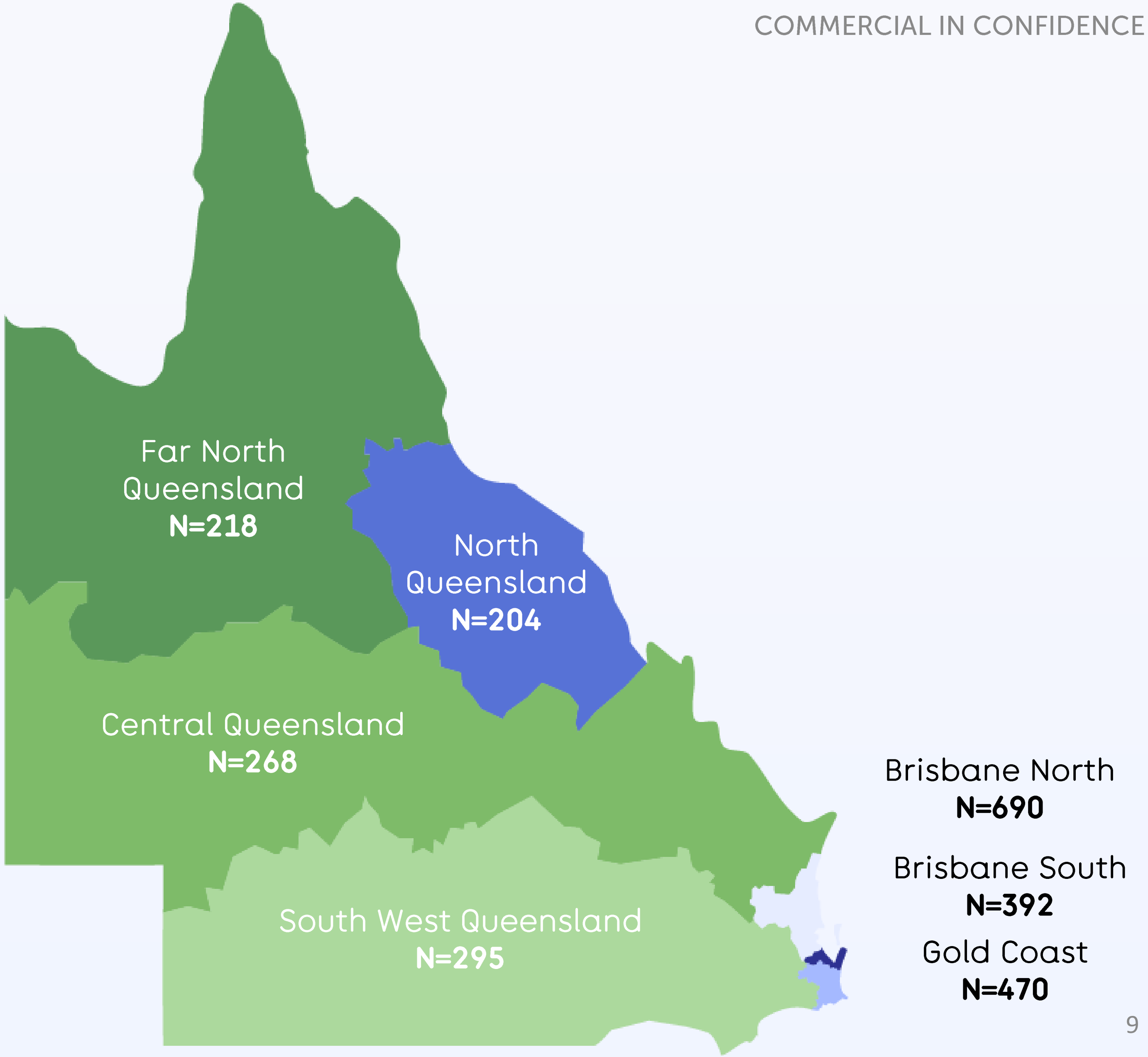
Containers for Change

Significantly more than or less than Jan 25 Other Regions at 95% CI

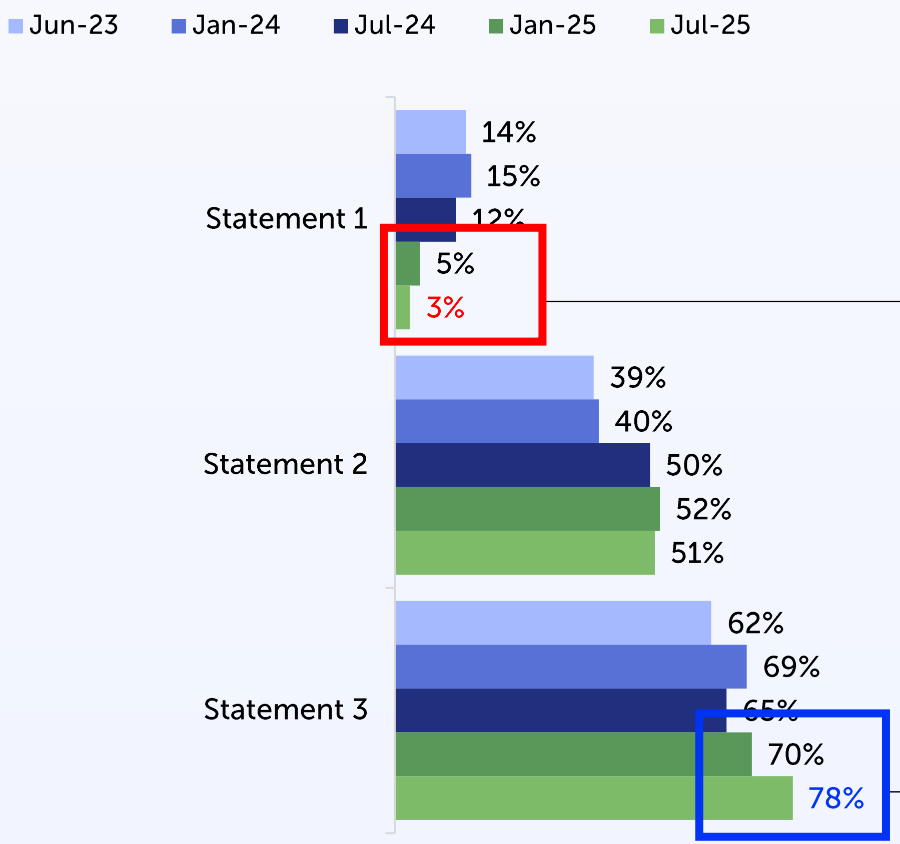
About the research

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



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.

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Got further questions?

Connect with the CX team!

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