



Customer Survey Detailed Regional Findings

Wave 6

Fieldwork: 19th January to 11th February 2026

March 2026

Version 1

Brisbane
South

Prepared by
veracity

Research methodology, sample and reporting

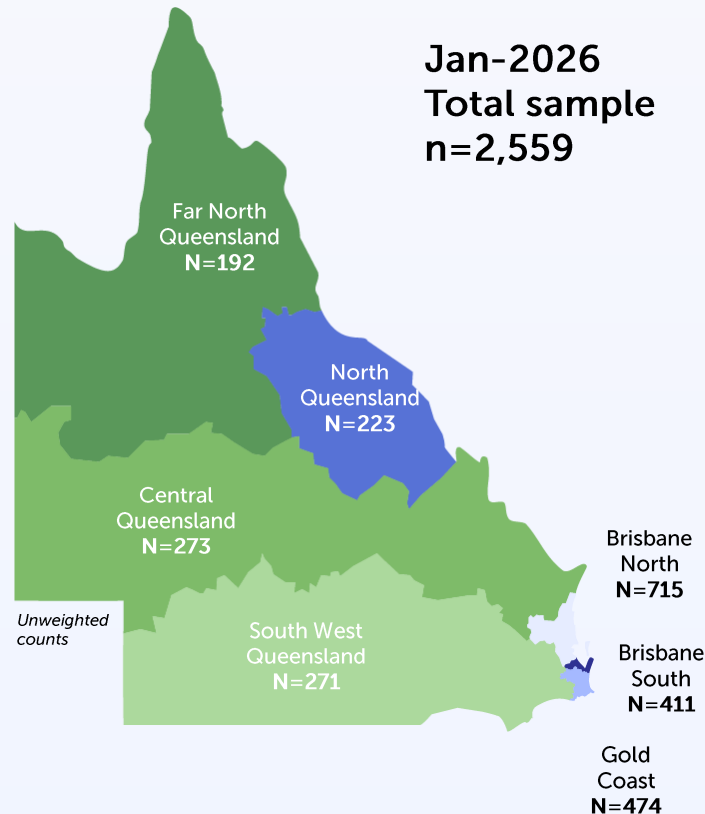
Fieldwork

From 19th January to 11th February 2026 we surveyed n=2,559 Queenslanders aged 18 and above to explore their views on recycling and Containers for Change.

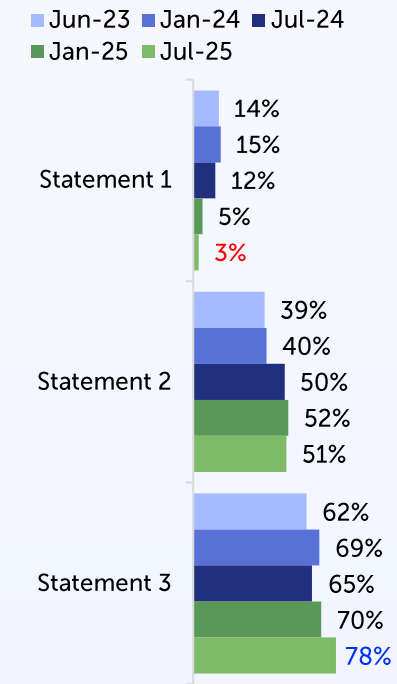
Fieldwork and sampling was sourced via Dynata, as per all previous tracking surveys.

Data weighting: "QLD-wide age x gender" post-weighting to the data, so it fairly represents the views of Queenslanders.

Sample by Region



Significant Differences



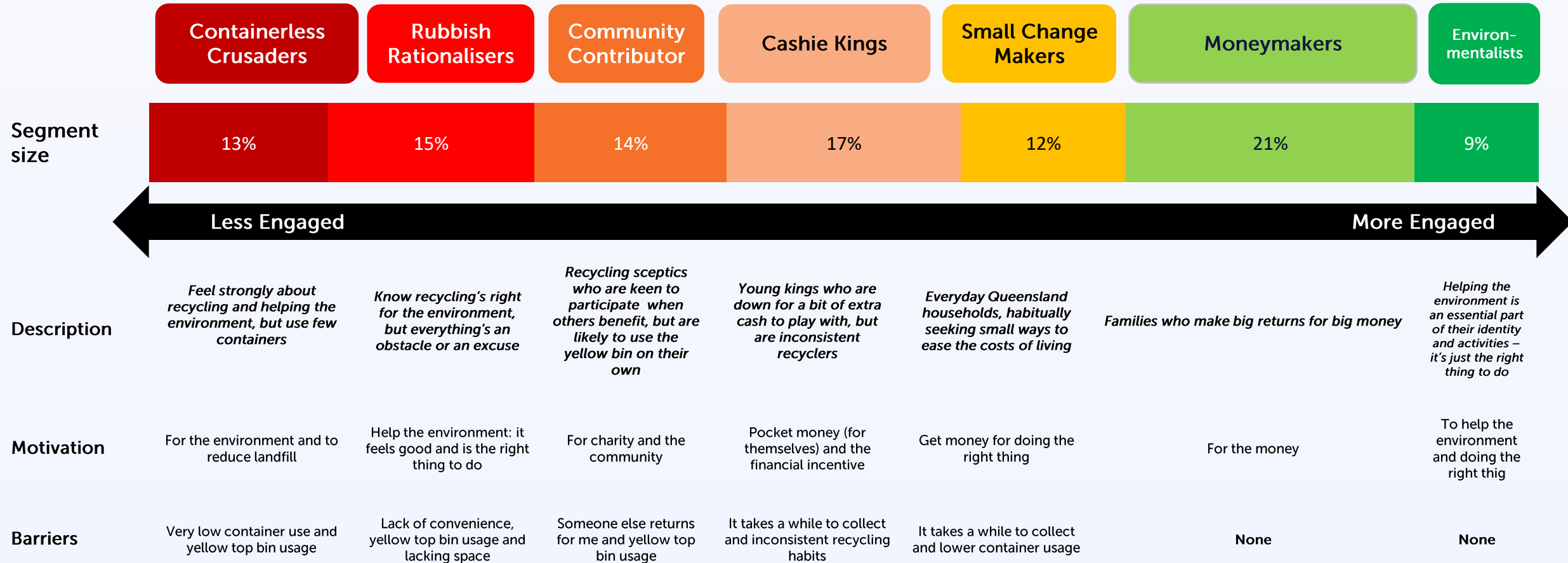
Red or ▼ =
Significantly less

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.

Customer segments



Key Regional Differences and Changes this Wave



North Queensland demonstrates high salience & high experience



Biggest pain points are in Brisbane South; lowest NPS & satisfaction



Biggest drops in NPS & CSAT in Far North and Central Queensland



Lowest participation in Brisbane North & Brisbane South

Brisbane South



Participation holds steady as group engagement declines.

Participation broadly mirrors the state

Levels of participation, awareness and recommendation are relatively stable over time, although satisfaction and NPS and lower here than other regions.

Group participation is declining

While total participation has held steady, group participation has fallen over the past year, reducing one pathway into the scheme.

Storage and value exchange are key pain points

Limited storage space and concerns about whether the return is “worth it” are more pronounced in Brisbane South than elsewhere. The hot & wet weather has become more of a barrier than in the past.

More new users, weaker experience

Brisbane South has a higher share of newer participants who have only been participating for 6 months or less. At the same time, overall experience ratings are lower, suggesting onboarding and early-stage friction.



Key Metrics

Those in South Brisbane have similar levels of participation, awareness and recommendation as wider Queensland.

71%

Participate
at home

-2% vs 73%

Queensland NET

64% collect & return

7% collect but give to others
to return

21%

Participate
with a group

-2% vs 23%

Queensland NET

3% are responsible for the
group's participation

18% give containers to the
group in some way

94%

Aware of the
brand

+2% vs 92%

Queensland NET

84%

Would
recommend
the scheme

-3% vs 87%

Queensland NET



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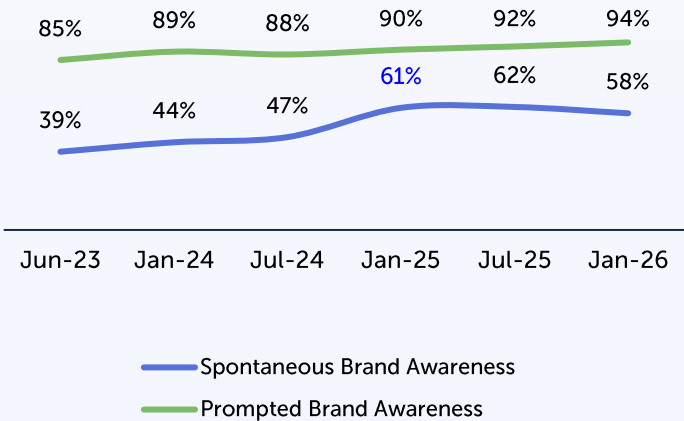
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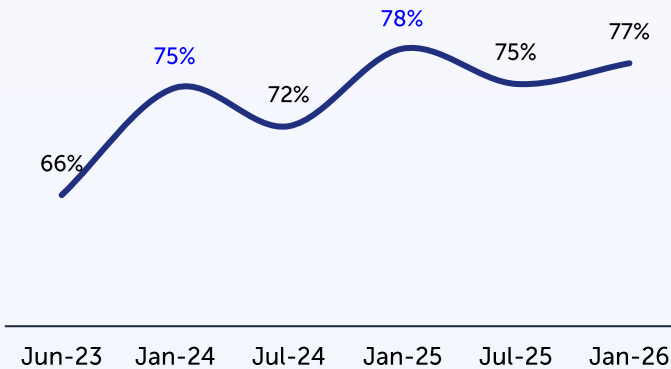
Key Metrics: Longitudinal Trends

Group participation has decreased over the past year, although total participation has held steady.

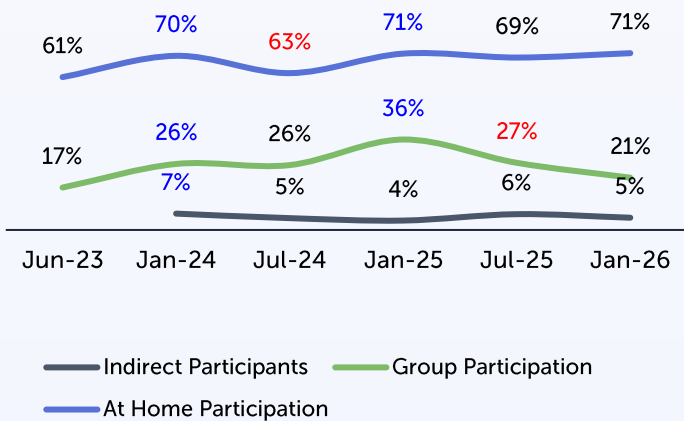
Awareness



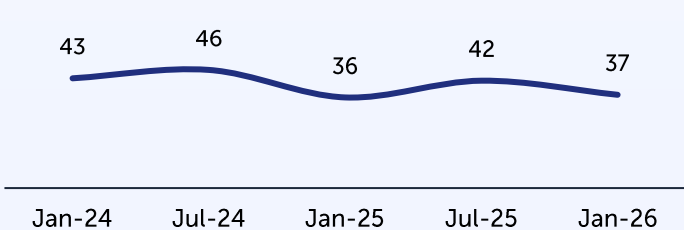
Total Participation



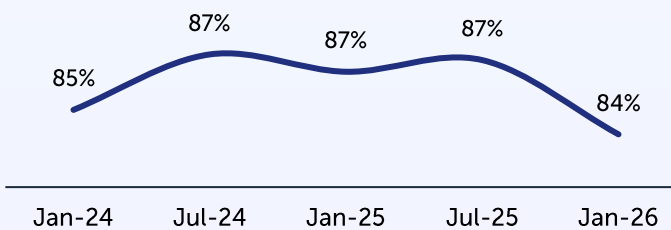
Participation Types



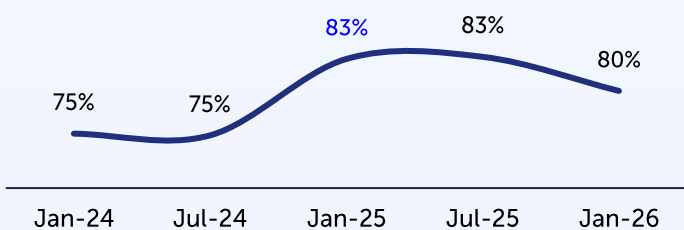
NPS



CSAT



Trust

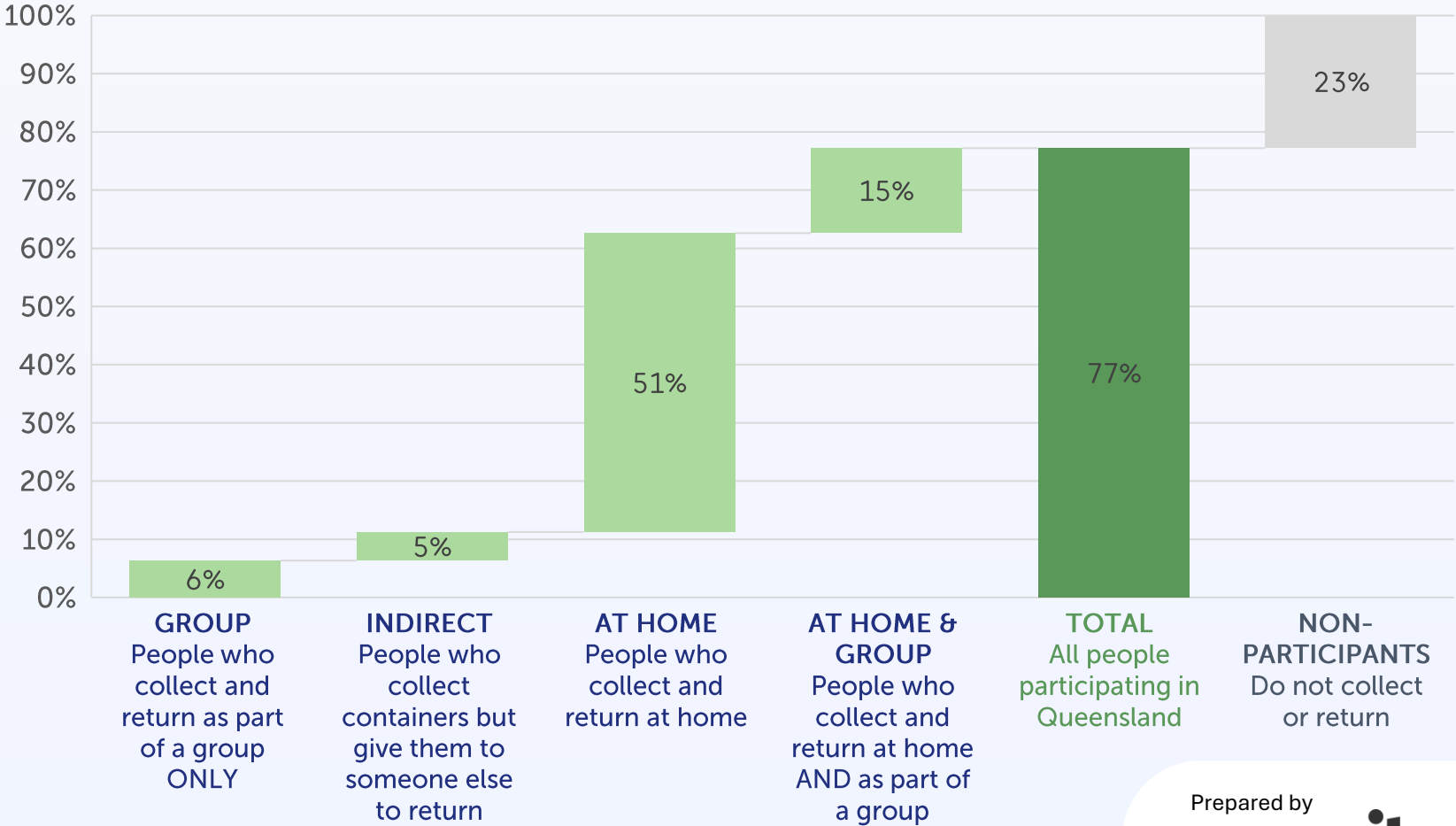




Participation Breakdown

A little more than three quarters of those in Brisbane South are participating, with half participating at home only and around 15% participating both at home and as part of a group. Group participation is down significantly since last summer.

Participation Breakdown

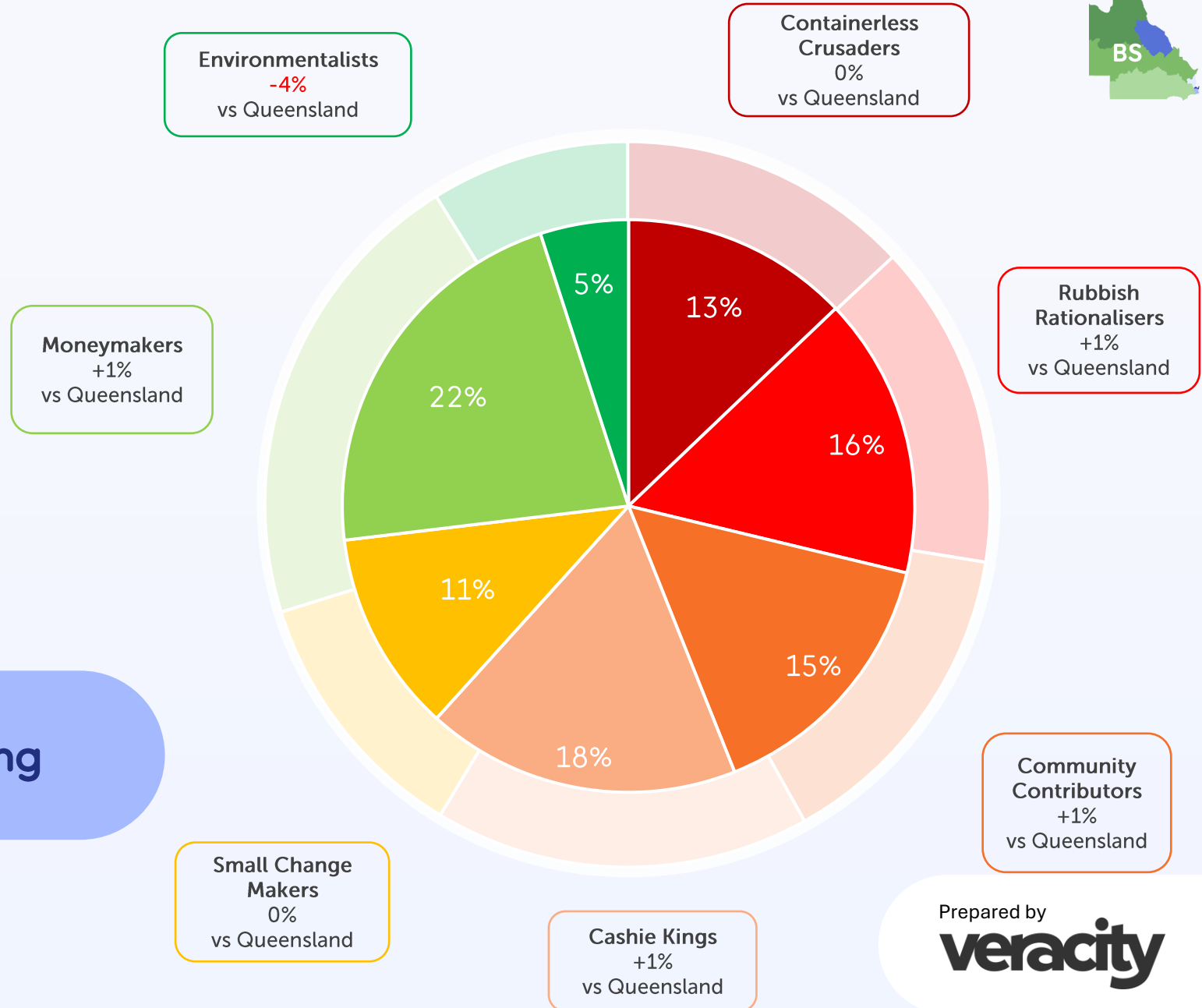


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Customer Segments

Those in Brisbane South are less likely to be Environmentalists than in other regions, although other segments are relatively consistent.

27% have no barriers to participating

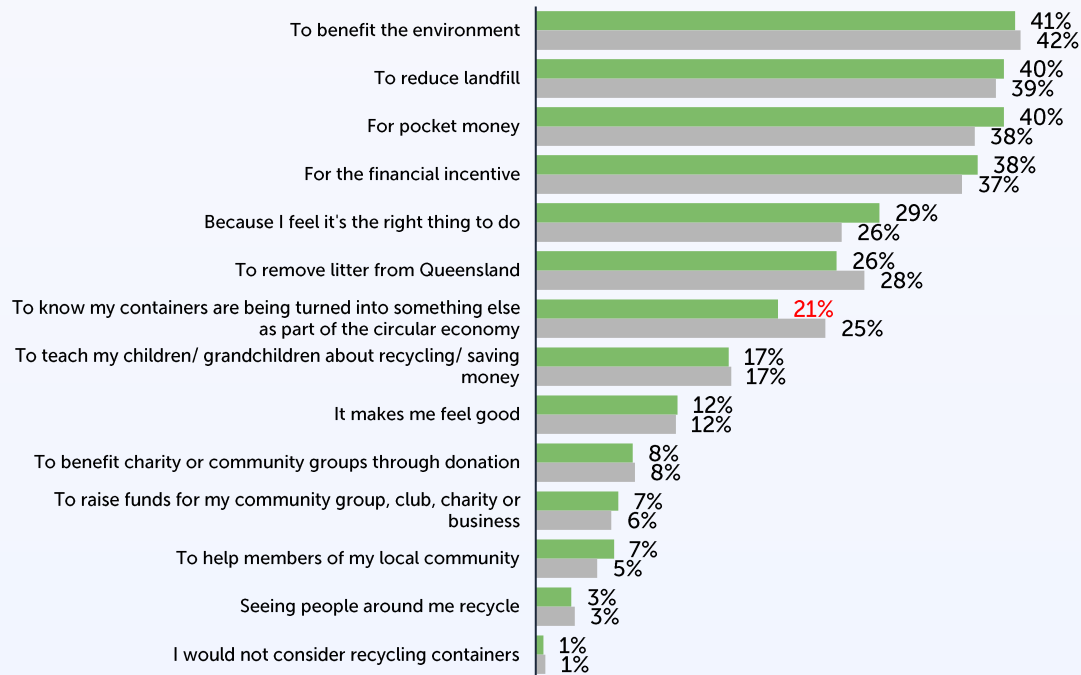




Why do/don't people participate?

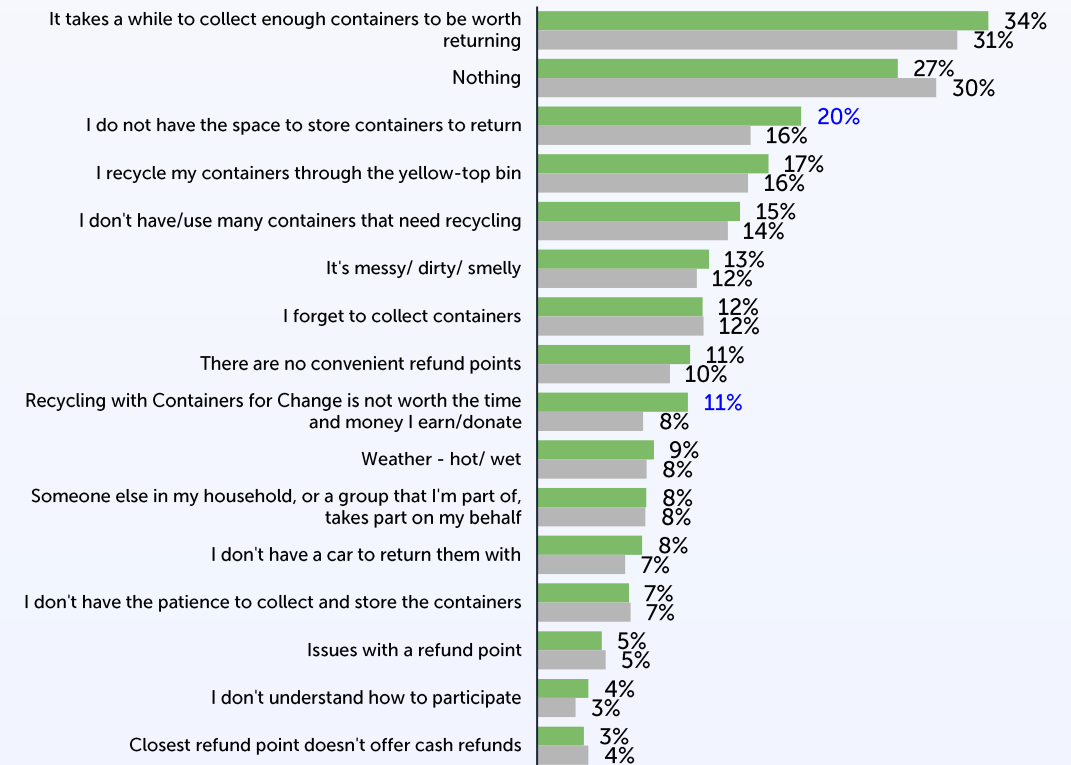
Storage is a barrier for those in Brisbane South, as is the perceived value exchange.

Motivations

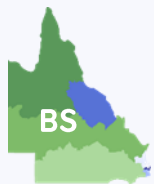


■ BS ■ Queensland NET

Barriers



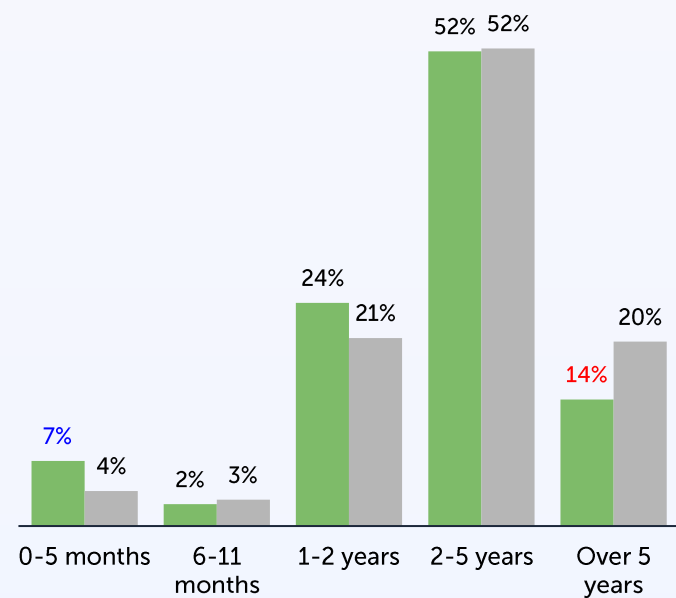
■ BS ■ Queensland NET



How is the experience?

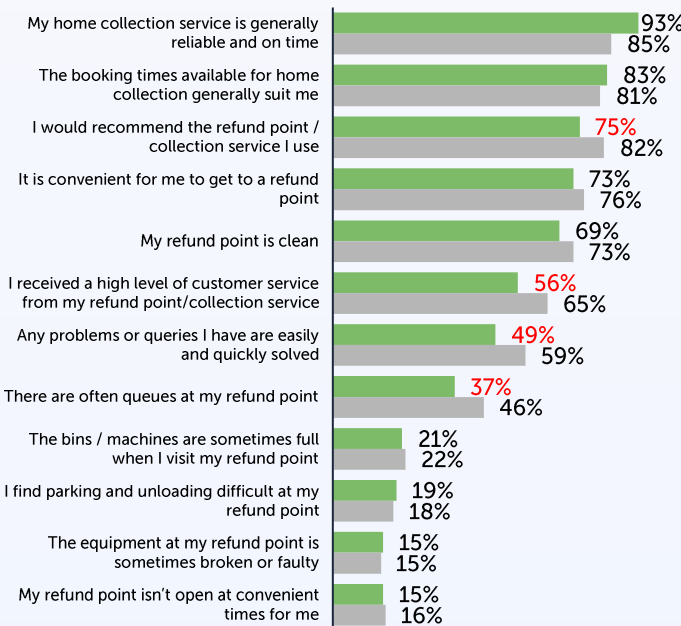
There are more new scheme participants in Brisbane South than elsewhere, but the experience is seen as poorer.

Tenure



■ BS ■ Queensland NET

Experience



■ BS ■ Queensland NET

Feedback

“I just drop off my labelled bags and go about my daily business.”

“There could be more locations to choose from”

“There are areas that require improvement”

“Unable to get to a depot and arranging collection takes too much time and paperwork for almost no return.”

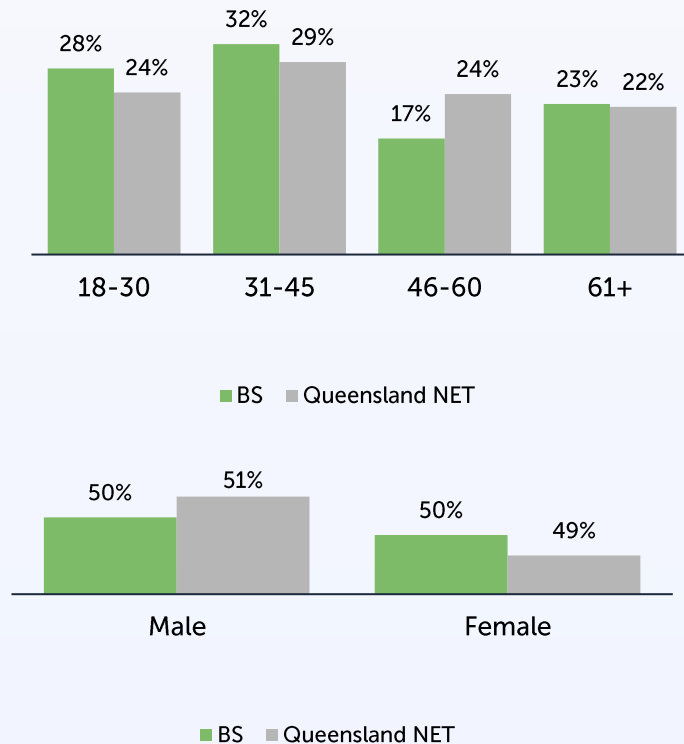
“It's hard without a car”



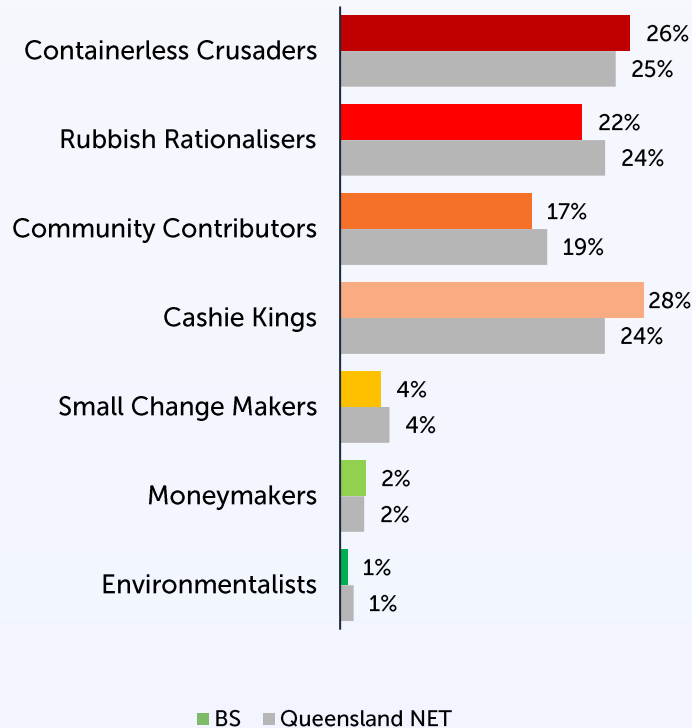
Who is not participating?

Non-participants in South Brisbane skew under 45, and they're less likely to have a car which is a barrier.

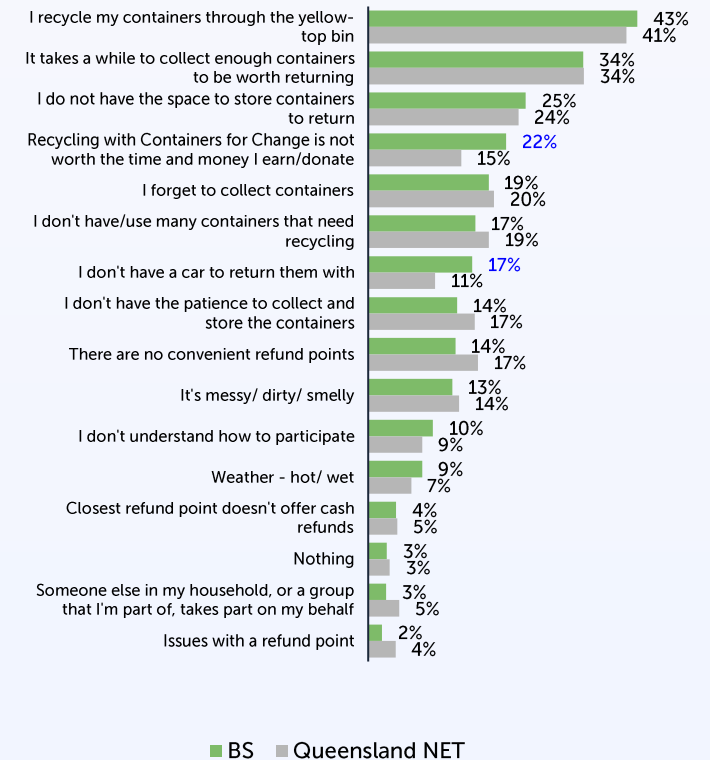
Age & Gender



Segment



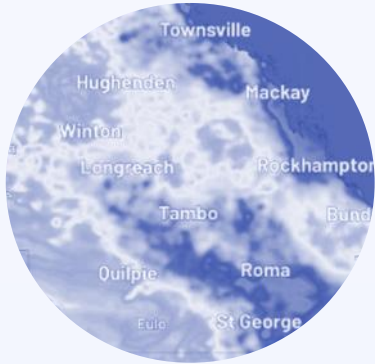
Barriers



Total Queensland: Executive Summary

The wider context over summer 25/26.

The summer of 25/26 combined extreme heat (driving higher drink consumption) with widespread rain events that disrupted storage and returns, while rising living costs and fuel price spikes altered the value equation of a container return - alongside the long school holidays that shifted consumption habits and increased time spent out of home.



Heat lifts drink consumption, rain disrupts storage and returns



Elevated inflation and higher festive grocery prices (notably in food and soft drink)



Fuel price spikes in December and January



Holidays shift habits and contexts for consumption

Summer 2025: Awareness is maxed and goodwill is strong, but the value equation is weakening - enthusiasm is slipping and friction is winning.

How are we tracking?

Metric	Jan-26	Change last 6 months
Prompted Brand Awareness	92%	▲ +1%
Total Participation	79%	0%
At-home Participation	73%	▼ -1%
Group Participation	23%	▼ -3%
Customer Satisfaction	88%	▼ -1%
NPS (Likelihood to Recommend)	45	▼ -6
Ease	82%	▼ -1%
Trust	79%	0%

What's changed?

Awareness is high, participation is stable, but enthusiasm is slipping – an early warning of future drop-off.

- People are less likely to recommend the scheme (NPS dropped beyond the expected summer dip), find collecting a little harder than returning, and increased summer volume brings niggles to the experience (mess, queues, full bins) that add friction.
- The total number of people participating is stable, but fewer of them are participating in multiple contexts – more are participating only at home.
- More containers are ending up in landfill, particularly from under 30s and from containers used out and about.
- With the scheme more mature, it is known by everyone, seen in most places and trusted by most – but because of that maturity, it is losing some of its shine, becoming more of a background chore and vulnerable to friction in the experience.

What's holding back growth?

Inconsistency, not opposition, is holding back volume growth – containers leak into landfill when collection habits break. Growth is no longer limited by awareness, trust or understanding – it is limited by moment-level friction.

- A key issue lies in inconsistent container collection. Even with high participation rates, a significant portion of containers still end up in general waste from the less engaged and inconsistent current participants. Queenslanders feel very positively about the scheme – but still fail at the moment of collection and disposal.
- Container return challenges include queues and overflowing bins, exacerbated by seasonal summer demand.
- The perceived value equation is softening; for many, the effort does not match the reward (emotional/ transactional).
- Amongst group participants, we're lacking clear recycling leaders taking charge at the group – there is a reluctance to take responsibility.
- Across the network return points, preference doesn't always match the available CRP types.

What's new and surprising?

Knowledge is up, but actions are down. Groups can be the multiplier – but they are declining.

- Knowledge of how to participate has reached its highest level to date, yet actions related to the scheme have declined.
- Both the number of people involved in any groups, and the number of people participating at a group, are down. Groups act as a multiplier, capturing containers from more contexts, and giving people a community motivation to be involved.
- Enquiry intent improved among people who don't participate; but it has not translated to actions among non- or existing participants.
- Advertising was very visible and memorable, with ad recall significantly increased – 2 in 3 Queenslanders saw the ads. "Bincoin" was successfully established as a new brand association, however, we saw declines in almost all other brand associations. Actions taken after seeing the ads was lower than last summer.
- News recall was low, and the inquiry did not significantly affect overall sentiment.

What tensions do we see in the data?



**Awareness is high,
but enthusiasm is
slipping**

Brand awareness remained stable and advertising recall jumped sharply. Yet NPS dropped 6 points and post-ad action declined.

This suggests the system is doing a great job at being seen, but a weaker job at converting attention into conviction and behaviour. People know CfC, see it everywhere - but are increasingly unsure it's worth the effort.



**Growth isn't a
recruitment
problem, it's a
collection problem**

Despite high awareness and stable participation, a third of containers still go to landfill. Among existing participants, we see inconsistency in their collection habits, especially when out and about.

This reframes the challenge from participation growth to 'how do we stop containers leaking out of an already-trusted system?' – a more operational and design-led problem than a marketing one.



**Group participation
is shrinking, even
though it's the
multiplier**

This wave, group participation fell whilst at-home only participation rose.

Groups are the engine for normalising behaviour, ensuring workplace participation and creating community scale. People want to help, but don't want to be the organiser. They need social permission, not motivation. Group decline directly undermines long-term growth, even if overall participation levels look healthy.

How are the regions alike or different?

Similarities across regions

- Awareness and participation are broadly strong across regions, but the statewide story is that enthusiasm is slipping and friction is winning.
- The limiting factor is less “belief” and more effort at the moment of collecting/returning (queues, storage, mess, time).

Differences across regions

- Regional QLD (esp. North Queensland and South West Queensland) is more financially motivated - participation is more sensitive to whether the return feels worth the effort.
- SEQ/coastal areas tilt more toward environment/community or “default substitutes” (yellow bin), with urban constraints like storage and convenience more prominent (esp. Brisbane South, Brisbane North, Gold Coast).
- Gold Coast is the clearest “helping others/community” skew, while Far North is strongest on landfill/environment purpose.

So where do we focus?

Habit

Address containers lost
to landfill

There is significant opportunity to develop more consistent habits among existing participants, supporting and reminding them to collect and return more containers, in more places, and more contexts.

People who participate in the scheme, but don't collect every container, are more likely to put their non-collected containers in the red bin than non-participants are (who usually use the yellow bin).

Among the more engaged participants, habits break when they're away from home. Among the less engaged, their habits aren't yet as solid – many forget to collect containers.

The problem is not attitudinal resistance, its situational failure.

Friction

Make it easier

Participants are generally very satisfied with their scheme experiences, but they do still find that collecting is a little harder than returning, and we're seeing that friction in the whole experience is starting to add up to more containers in landfill.

Participating consists of both collecting **and** returning. Summer exacerbates existing challenges: collection mess, smell and storage of increased volume; and returning suffers under increased volume with longer queues and overflowing bins.

It's more effortful to participate in summer, despite higher refunds from more containers collected.

Purpose

Make it feel worth it

A renewed focus on the purpose of participating – remind Queenslanders of their 'why' and what the outcomes of participating are – will support a stronger emotional reward in the perceived value equation.

The reasons people participate are consistently spread across three things: the environment, their community and for money, with the less consistent segments more motivated by the environment and community benefits.

It's the mix of the emotional reward with the transactional reward that fuels the value equation.

Further Reading

Additional Reporting Available:

- Customer Insights and Experience Report
- Marketing Impact and Planning
- Regional Member Insights



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Prepared by
veracity

No
container



goes to
waste



COEX
Container Exchange

