Container Exchange

Containers for Change

Customer Survey
Detailed Regional Findings

South West Queensland

Wave 6

Fieldwork: 19th January to 11th February 2026

March 2026

Version 1

Prepared by veracity

Research methodology, sample and reporting

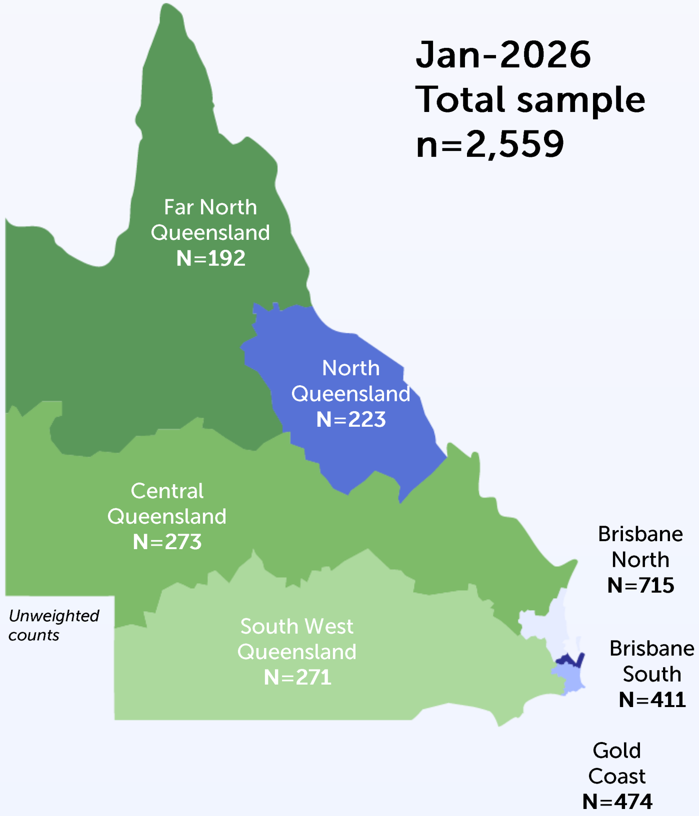
Fieldwork

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.

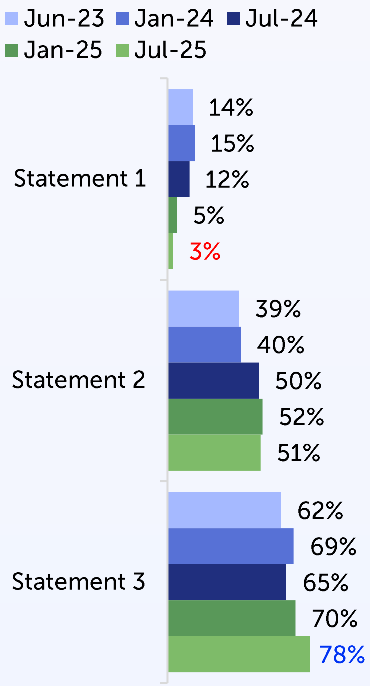
Fieldwork and sampling was sourced via Dynata, as per all previous tracking surveys.

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.

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Customer segments

	Containerless Crusaders	Rubbish Rationalisers	Community Contributor	Cashie Kings	Small Change Makers	Moneymakers	Environ-mentalists
Segment size	13%	15%	14%	17%	12%	21%	9%
	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**

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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

South West Queensland

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At-home participation dominates in South West Queensland.

At-home participation dominates

South West Queenslanders are more likely than average to participate at home and less likely to participate through group arrangements, reflecting more individualised usage patterns.

Gradual decline in participation and NPS

While overall participation remains healthy, there has been a slight erosion since mid-2024, alongside a decline in NPS, signalling emerging experience or effort concerns.

Financial rewards drive engagement

Pocket money and financial incentives are stronger motivators in South West Queensland compared to other regions, making the value exchange particularly important here.

Mess and effort are key barriers

The perceived messiness of collecting and storing containers, along with the time required to build up returns, are more prominent barriers in this region.

Key Metrics

Customers in South West Queensland are more likely to participate at home compared to the rest of Queensland. Awareness and recommendation levels are average.

78%
Participate at home

+5% vs 73% Queensland NET

72% collect & return

6% collect but give to others to return

20%
Participate with a group

-3% vs 23% Queensland NET

3% are responsible for the group's participation

17% give containers to the group in some way

94%
Aware of the brand

+2% vs 92% Queensland NET

87%
Would recommend the scheme

±0% vs 87% Queensland NET

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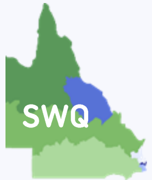
Base: Customer Survey Jan-26 Queensland NET Total n=2,548, South West Queensland n=268

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

Customer Survey, January 2026

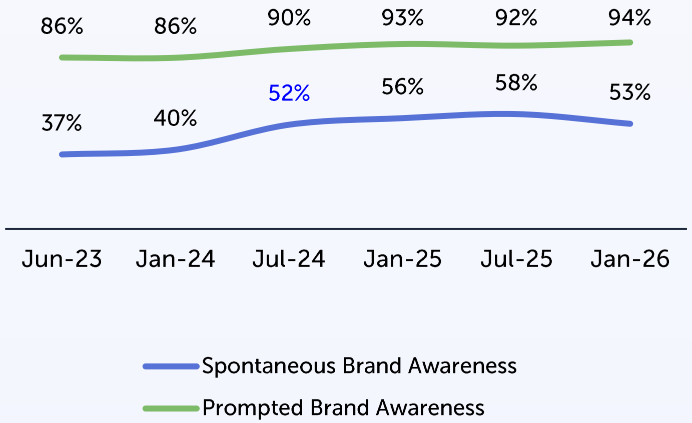
South West Queensland



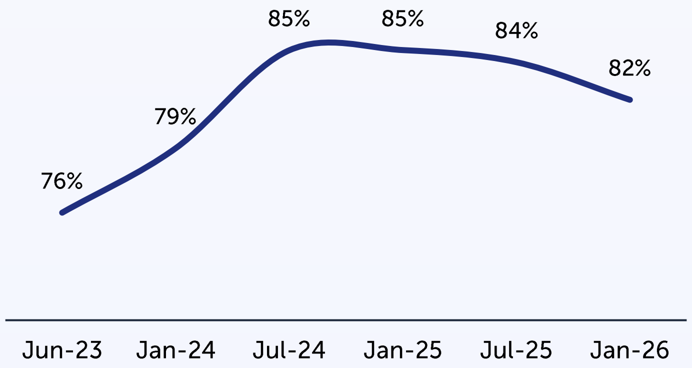
Key Metrics: Longitudinal Trends

Overall participation has eroded slightly in South West Queensland since July 2025, as has NPS.

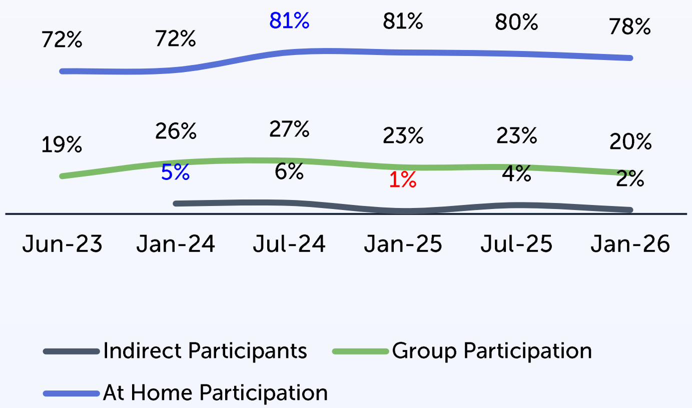
Awareness



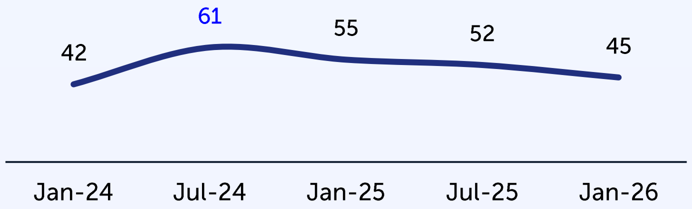
Total Participation



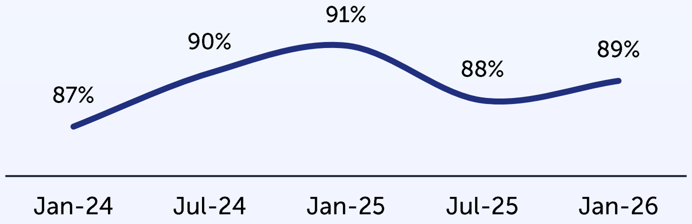
Participation Types



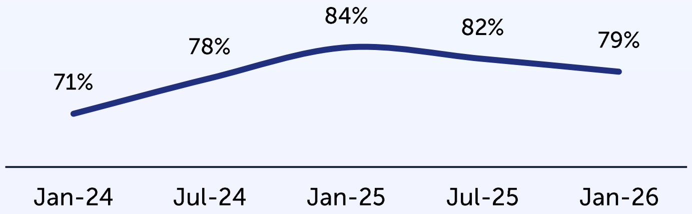
NPS



CSAT



Trust



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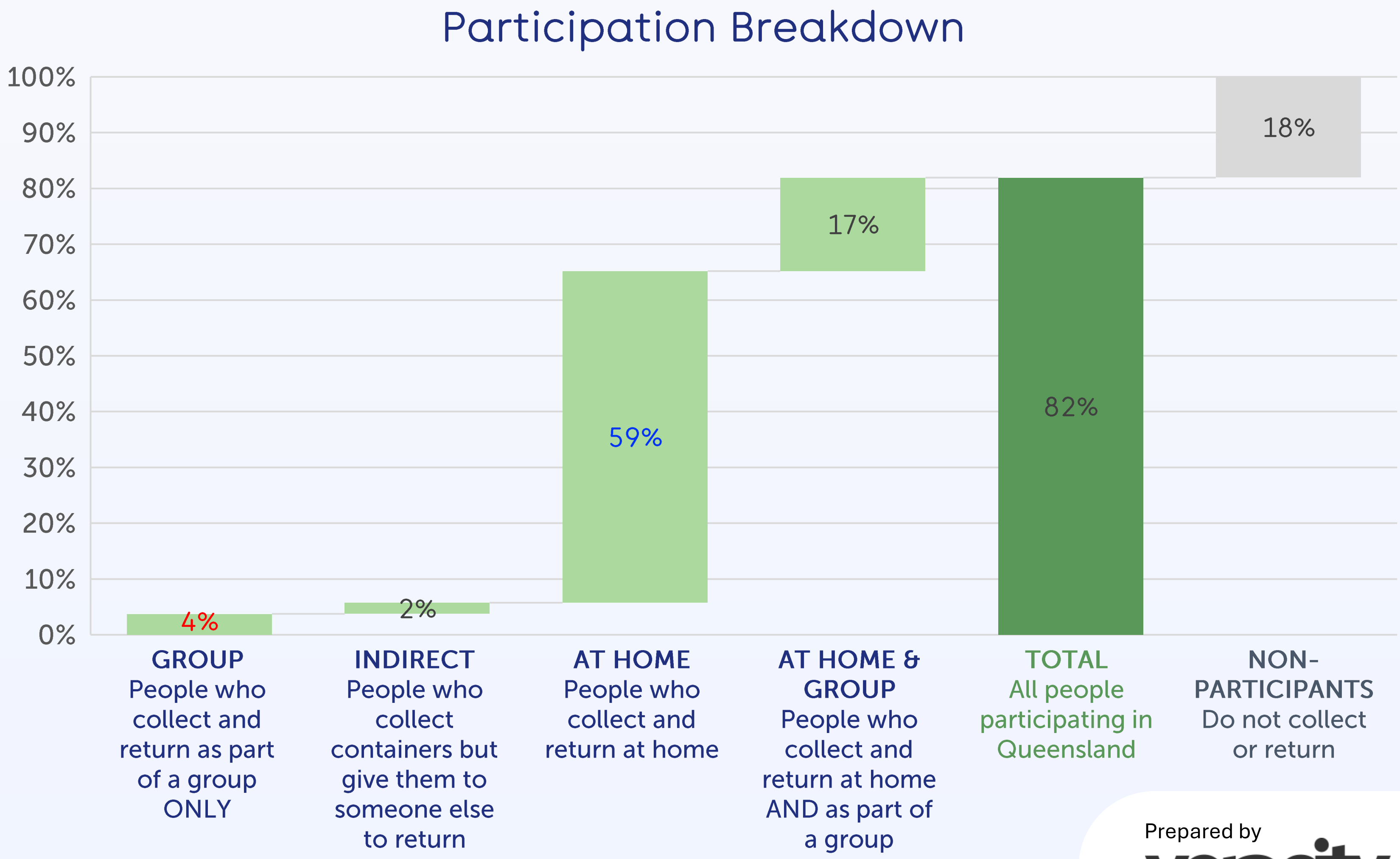
Base: Customer Survey Jan-26 Queensland NET Total n=2,548, South West Queensland n=268

Significantly more or less than previous wave at 95% CI

Participation Breakdown

Although total participation is similar to that of the rest of Queensland, in the South West we see more customers participating at home, and less participating as part of a group.



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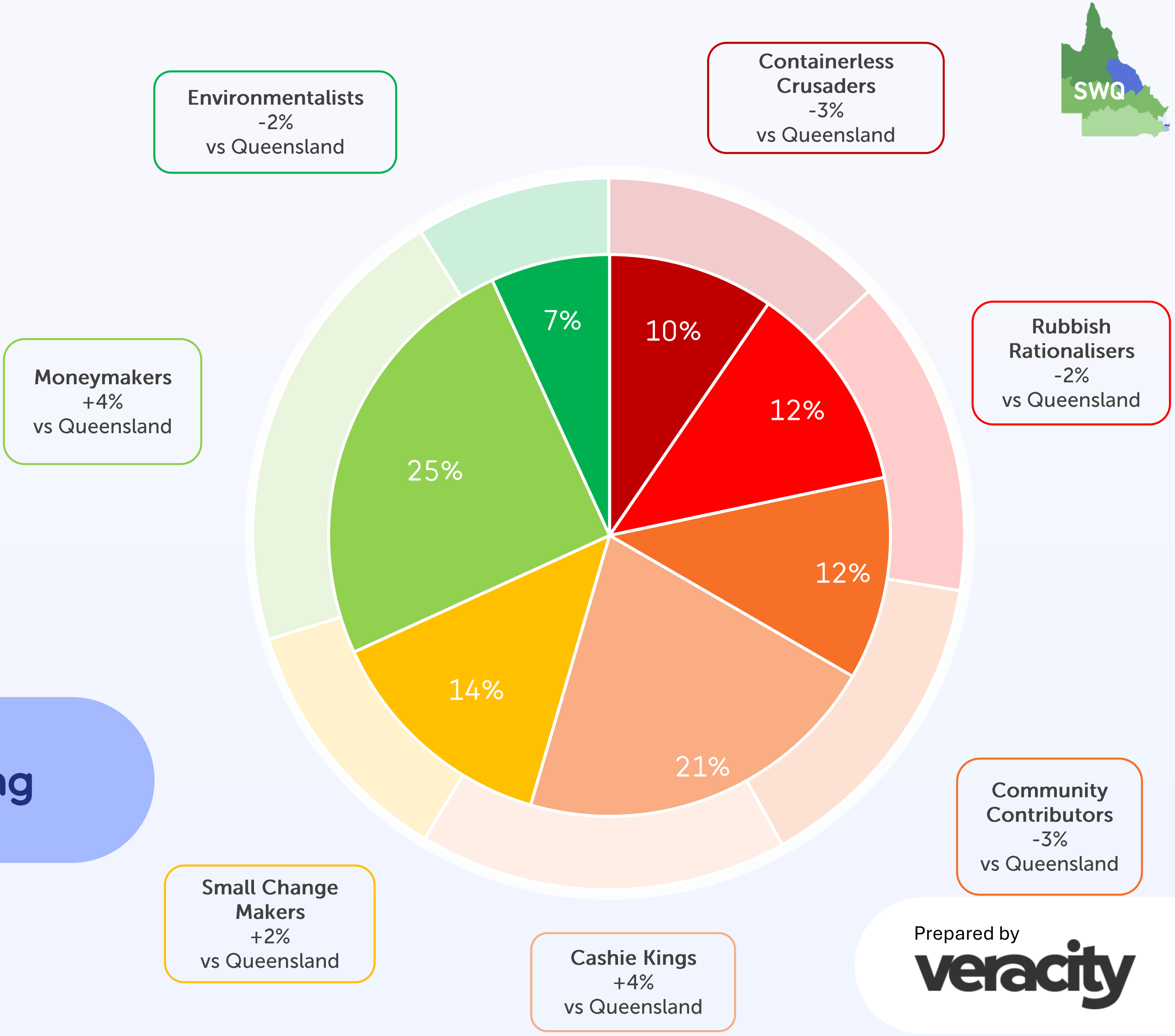
Base: Customer Survey Jan-26 Queensland NET Total n=2,548, South West Queensland n=268

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

Customer Segments

Segment sizes in South West Queensland are mostly similar to those seen at a total Queensland level. Overall, there are slightly more Moneymakers and Cashie Kings, but fewer Containerless Crusaders and Community Contributors.

32% have no barriers to participating



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Base: Customer Survey Jan-26 Queensland NET Total n=2,548, South West Queensland n=268

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

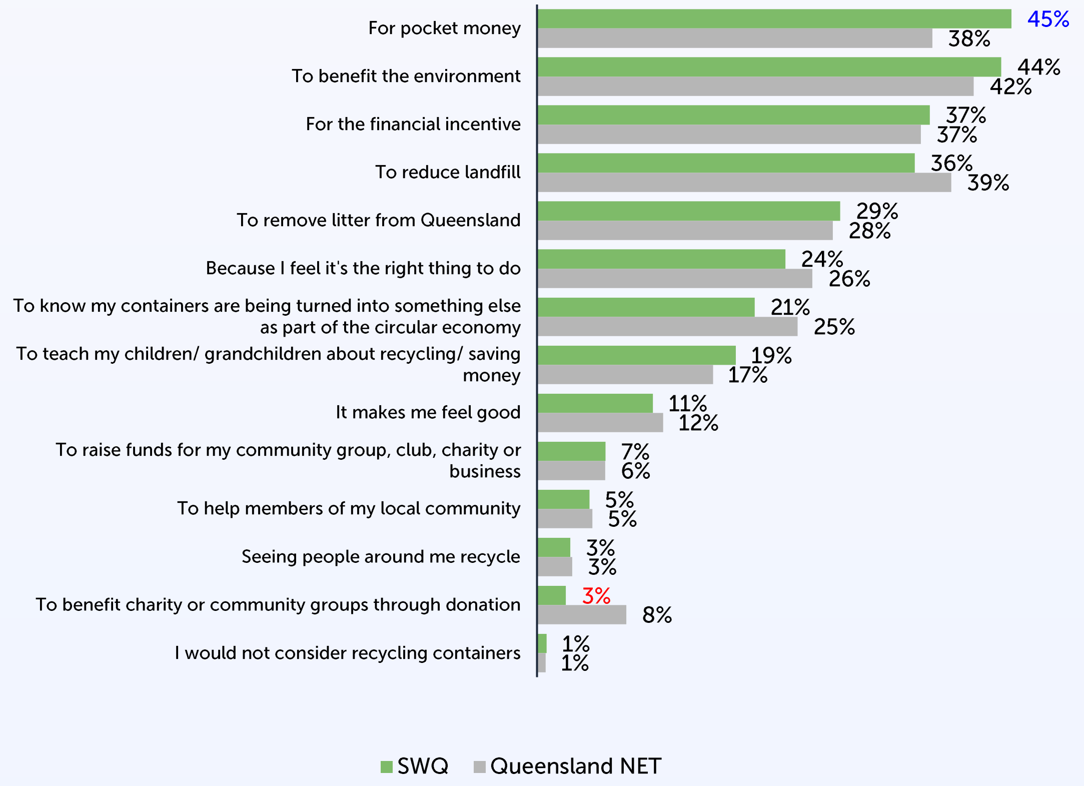
Customer Survey, January 2026

South West Queensland

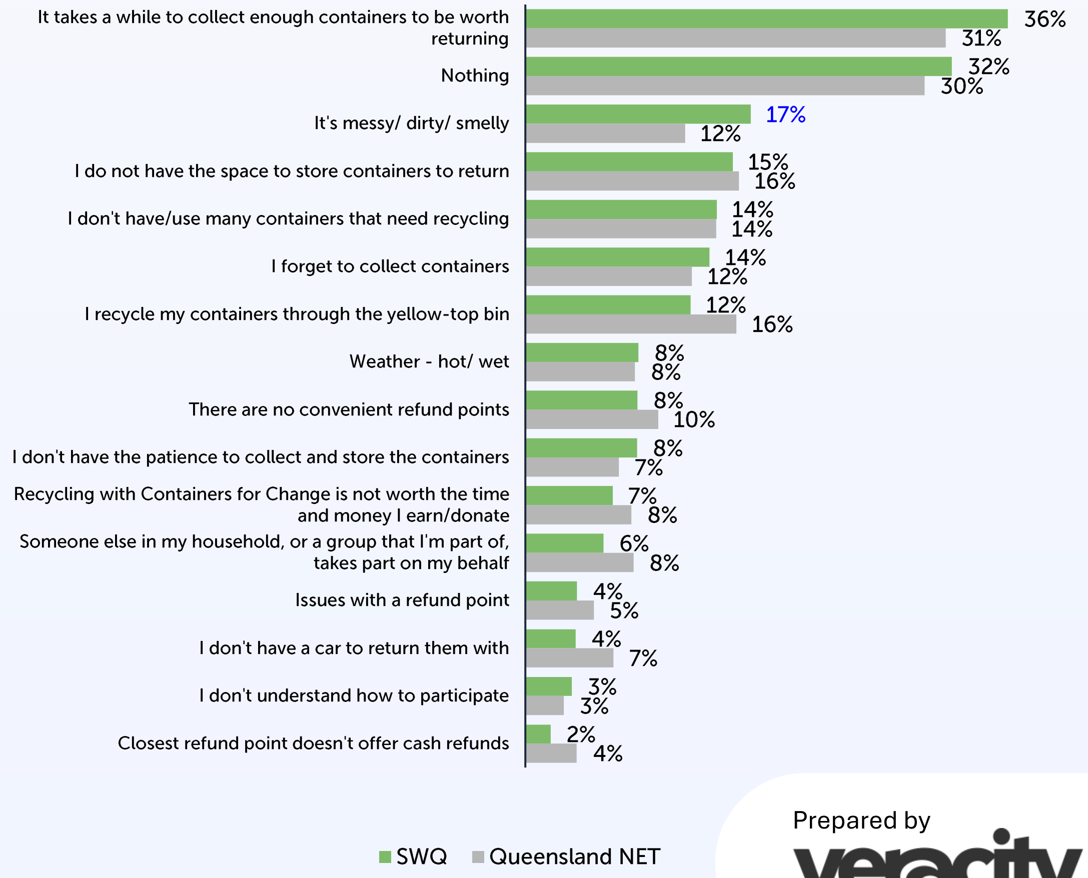
Why do/don't people participate?

Pocket money is a bigger than average motivator, although the messiness of participating is a barrier.

Motivations



Barriers



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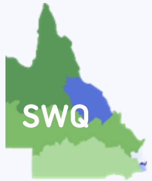
Base: Customer Survey Jan-26 Queensland NET Total n=2,548, South West Queensland n=268

Significantly more or less than other regions at 95% CI

Customer Survey, January 2026

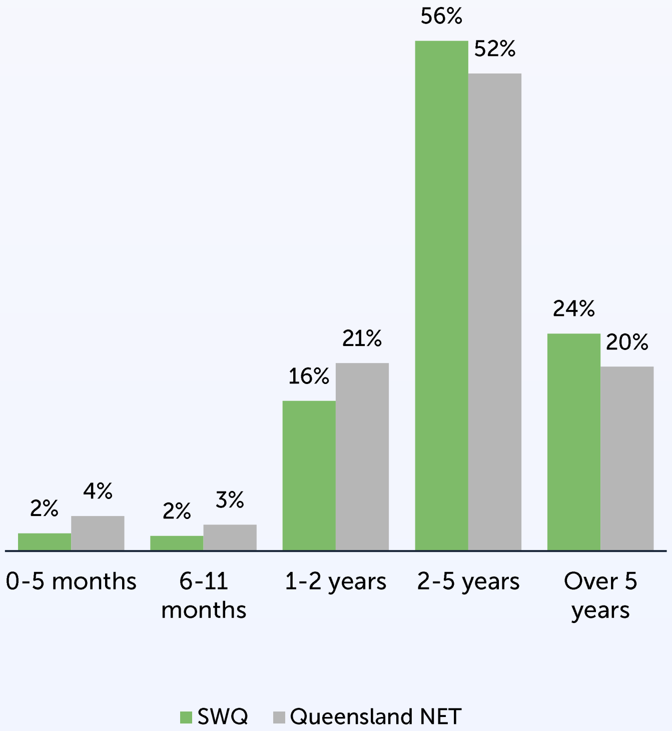
South West Queensland

How is the experience?

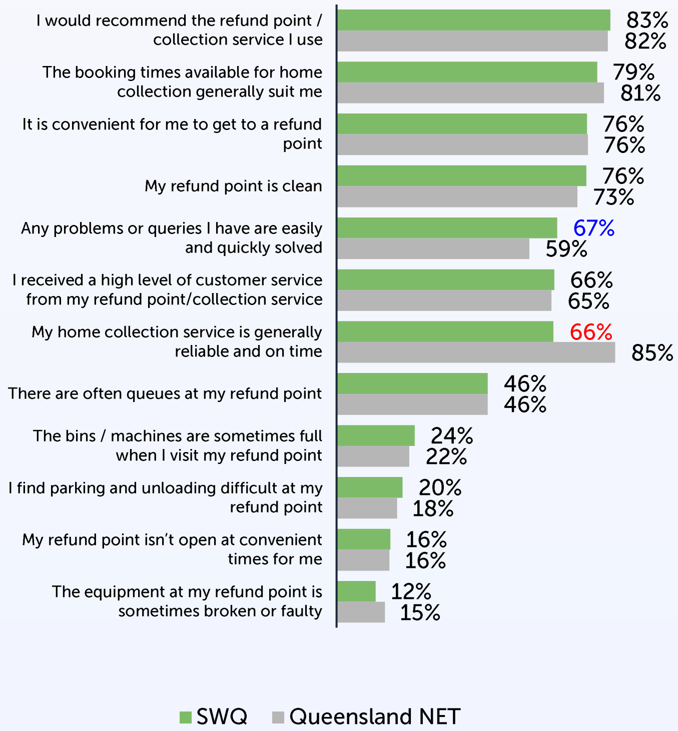


Over three quarters have been participating for more than 2 years, and they feel any issues are easily resolved.

Tenure



Experience



Feedback

"I live in a rural area, need to travel 10 kms to pop up point, which I find very reasonable in the circumstances"

"My local is fantastic it's accurate and the staff are good too"

"I book them to be collected- it couldn't be easier."

"I drive into the depot, the ladies take my bags and give me new ones. I'm in and out in 5 mins."

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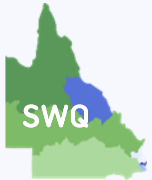
Base: Customer Survey Jan-26 Queensland NET Total n=1,793, South West Queensland n=205

Significantly more or less than other regions at 95% CI

Customer Survey, January 2026

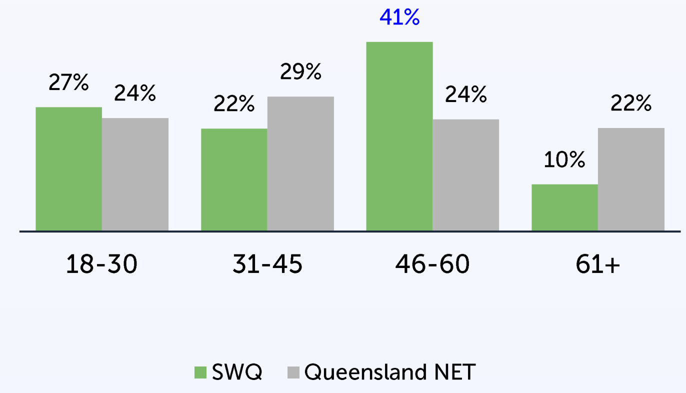
South West Queensland

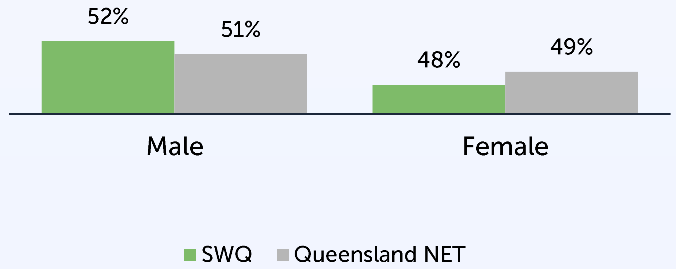


Who is not participating?

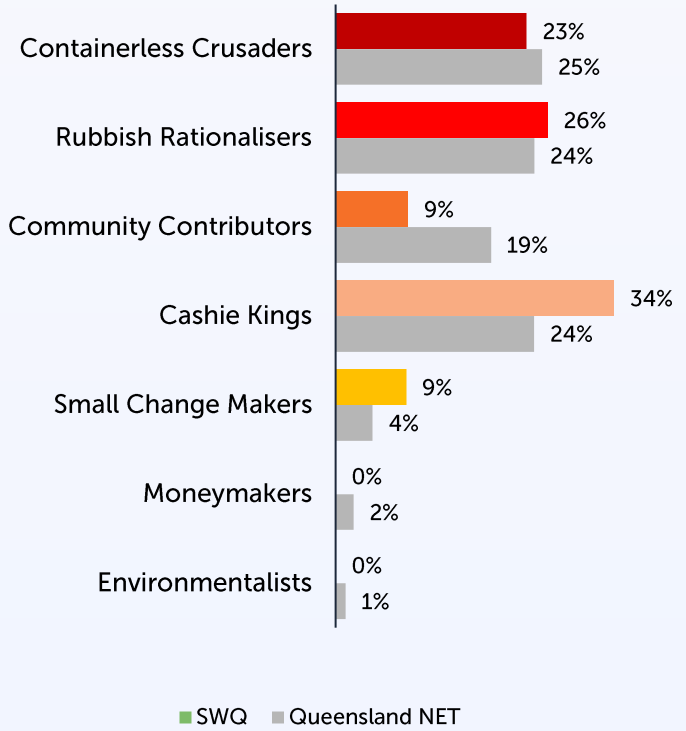
Those not participating tend to be 46-60, and they feel it takes too long to collect enough containers.

Age & Gender

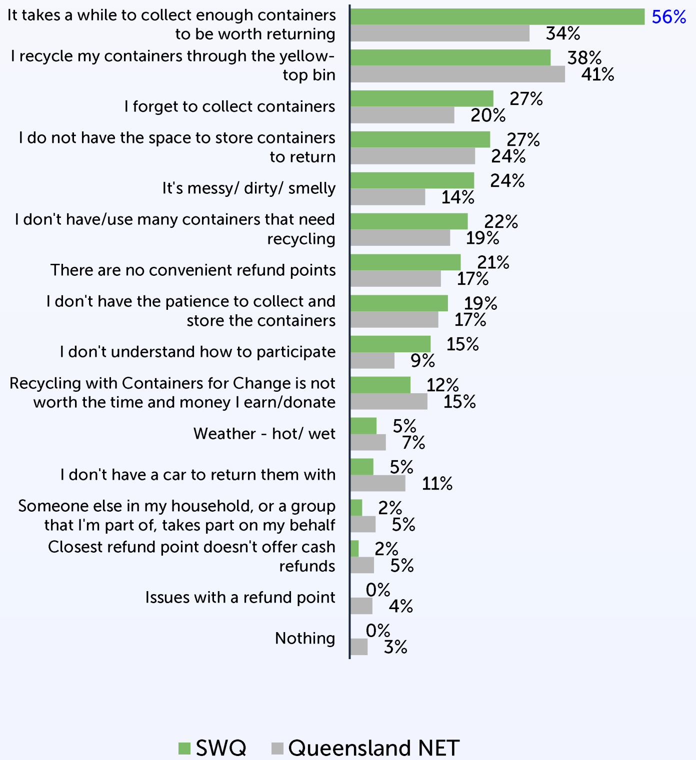




Segment



Barriers



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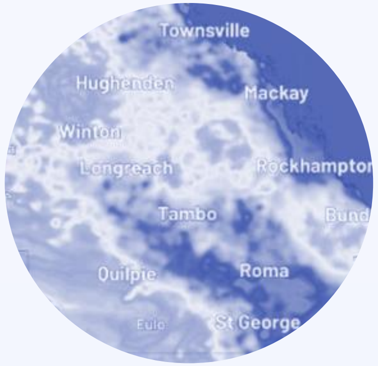
Base: Customer Survey Jan-26 Queensland NET Total n=535, South West Queensland n=49

Significantly more or less than other regions at 95% CI

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.

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What tensions do we see in the data?

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.

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.

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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No container

goes to waste

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