

Surat Basin population report, 2022

Introduction

The resource sector in regional Queensland utilises fly-in/fly-out and drive-in/drive-out (FIFO/DIDO) workers as a source of labour supply. These non-resident workers live in regional areas while on-shift. The Australian Bureau of Statistics' (ABS) resident population estimates for these areas do not include non-resident workers.

The non-resident population represents the number of FIFO/DIDO workers who are on-shift in the region at a given point in time. This group includes those employed in construction, production, and maintenance at mining and gas industry operations, renewable energy projects and resource-related infrastructure.

This report provides non-resident population estimates for the Surat Basin during the last week of June 2022. It also includes full-time equivalent (FTE) population estimates, which aggregate the resident and non-resident populations to provide a more complete indicator of demand for certain services.

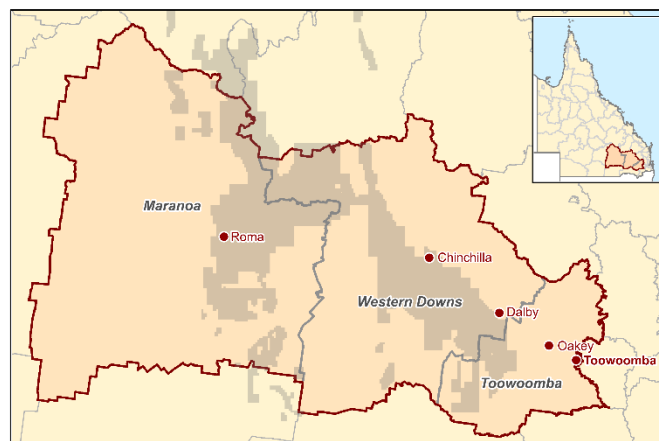
Estimates within this report are primarily derived from the annual Survey of Accommodation Providers conducted by the Queensland Government Statistician's Office (QGSO). The survey includes worker accommodation villages (WAVs), hotels, motels and caravan parks.

Key findings

Key findings of this report include:

- The Surat Basin had an estimated non-resident population of 3,510 persons in June 2022, around 110 persons (or 3%) lower than in June 2021.
- As in June 2021, the Surat Basin's non-resident population in June 2022 largely comprised the ongoing production, drilling and maintenance workforces of the major coal seam gas (CSG) projects. A sizeable number of other workers were engaged in renewable energy project construction, while CSG development also contributed additional numbers.
- The small decline in the region's non-resident population in 2021–22 was due largely to a reduction in the number of renewable energy construction workers, as some projects progressed to the testing and commissioning phase.
- At the LGA level, Western Downs had a non-resident population of 2,525 persons (or 72% of the regional total) in June 2022. Maranoa (815 persons or 23%) and Toowoomba (170 persons or 5%) made up the balance.
- In 2021–22, the non-resident population declined in Western Downs (–115 persons or –4%) and Maranoa (–50 persons or –6%). FIFO/DIDO numbers in Toowoomba increased over this period (55 persons or 45%).
- In June 2022, around eight in ten non-resident workers in the Surat Basin stayed in WAVs while on-shift (2,750 persons or 78%). The remainder (760 persons or 22%) stayed in other accommodation types such as hotels/motels and caravan parks.
- More than half of the Surat Basin's non-resident population (1,870 persons or 53%) in June 2022 was counted in town rather than in rural areas. In Western Downs, most stayed in town (1,600 persons or 63%), while in Maranoa, comparatively few non-resident workers on-shift were counted in town (100 persons or 12%).
- In Western Downs, the number of non-resident workers on-shift staying in WAVs in town declined (–130 persons) over the year to June 2022, largely due to reduced numbers of renewable energy construction workers.
- The proportion of vacant and available hotel/motel rooms in the region decreased from 37% in June 2021 to 24% in June 2022, with many operators reporting that business had improved following the easing of COVID-19 restrictions.

Figure 1 Surat Basin region



The Surat Basin – at a glance

The Surat Basin (Figure 1) is a major energy region, based on coal seam gas production, coal mining and electricity generation. The region comprises the local government areas (LGAs) of Maranoa, Western Downs and Toowoomba.

Estimated population at June 2022:

Non-resident population	3,510
Resident population	223,565
Full-time equivalent population.....	227,075

Surat Basin update, 2021–22

The Surat Basin (Figure 3) in Southern Queensland is a major energy region and Queensland's main source of CSG supply. CSG-related activity continues to provide most of the region's resource-related employment, with three large CSG to liquefied natural gas (LNG) projects—Australia Pacific LNG (APLNG), Santos Gladstone LNG (GLNG) and Queensland Curtis LNG (QCLNG)—and smaller gas companies engaged in operations and development. Coal mines, power stations and renewable energy projects also contribute to resource industry activity in the region (Table 5).

Australia's LNG exports from onshore and offshore fields reached record levels in 2021–22 (83.3 Mt), an increase of 5.9 Mt or 7.6%, driven by high oil-linked LNG prices (DISER, 2022a; DISER, 2022b). In 2021–22, Queensland's LNG export volumes through the Port of Gladstone from production in the Surat Basin increased by 0.5 Mt (or 2.1%) to reach 23.5 Mt (GPC, 2022). Most of Queensland's LNG exports are sold under long-term contracts linked to global oil prices, with several months lag (Queensland Government, 2022).

In 2021–22, major CSG operators in the Surat Basin remained focused on sustaining gas supplies to international customers and domestic markets. **APLNG** achieved stable production in 2021–22, with continued strong field performance enabling the focus to shift from drilling to optimising existing operations (Origin Energy, 2022). **GLNG** production was steady at the end of the second quarter 2022 (Santos, 2022). Production from the Roma and Scotia fields increased due to optimisation efforts, while production at Fairview was steady. **QCLNG** continued its gas operations in Western Downs in 2021–22 (Shell plc, 2022b). In February 2022, the joint venture commenced plans to progressively drill and connect approximately 145 new gas wells in the region (Shell plc, 2022a).

Other companies also contributed to CSG activity in the Surat Basin in 2021–22. Work on the first phase of Arrow Energy's **Surat Gas Project** near Dalby continued (Arrow Energy, 2022c). By April 2022, 141 of more than 600 wells had been drilled, and related pipeline and surface infrastructure construction was progressing (Arrow Energy, 2022a). Senex Energy and infrastructure partner Jemena completed construction of the **Roma North Gas Processing Facility Expansion** during the year (Jemena, 2021). Along with Arrow Energy and Senex Energy, Armour Energy and Denison Gas also continued to deliver gas to the domestic market over this period (Armour Energy, 2022; Arrow Energy, 2022b; Denison Gas, 2022; Senex Energy, 2022).

Works continued on eight renewable energy projects in Western Downs in 2021–22 (Figure 3): **Blue Grass Solar Farm**, **Columboola Solar Farm**, **Coopers Gap Wind Farm**, **Dalby Hybrid Power Plant**, **Edenvale Solar Park**, **Gangarri Solar Farm**, **Wandoan South BESS**, and **Western Downs Green Power Hub**. By June 2022, some of these projects had reached the testing and commissioning phase, while construction continued at other sites (AEMO, 2022; AGL Energy, 2022; Columboola Solar Farm, 2022; Edenvale Solar Park, 2022; FRV, 2022; Shell Energy, 2022; Vena Energy, 2022b; Western Downs Green Power Hub, 2022; X-ELIO, 2022). Two new projects in Western Downs—**Dulacca Wind Farm** and **Wandoan South Solar Project**—also commenced construction during the year (Dulacca Wind Farm, 2022; Vena Energy, 2022a). While there were fewer non-resident workers on-shift in the region engaged in renewable energy project construction in June 2022 than in June 2021, they continued to make a substantial contribution to the total non-resident population.

Apart from the Surat Gas Project, there was relatively little CSG development in progress in June 2022. There were also no major CSG maintenance events and relatively few related infrastructure activities, such as power station maintenance and road works, underway at this time.

Non-resident population

The non-resident population of the Surat Basin was estimated at 3,510 persons at the end of June 2022, around 110 persons or 3% lower than in June 2021 (Table 1).

Most of the region's non-resident population in June 2022 was in Western Downs (2,525 persons or 72%). Around one-quarter was in Maranoa (815 persons or 23%), with the remainder in Toowoomba (170 persons or 5%).

The non-resident population of Western Downs declined by 115 persons or 4% between June 2021 and June 2022, due mainly to a decline in the number of renewable energy construction workers. In Maranoa, the non-resident population fell by 50 persons or 6% over this period, with reduced numbers of gas workers, as well as fewer road workers at the time of the survey.

The non-resident population of Toowoomba grew by 55 persons or 45% in 2021–22. Compared with the other LGAs, Toowoomba has a much smaller non-resident population, which in June 2022 largely comprised workers associated with the gas industry, road works, renewable energy and other construction.

Non-resident population

The non-resident population is the number of fly-in/fly-out or drive-in/drive-out (FIFO/DIDO) workers who are living in the area of their workplace temporarily, and who have their usual place of residence elsewhere.

Due to shift arrangements, not all members of the non-resident workforce are present in the local area at one time. For that reason, the non-resident population refers to the number of non-resident workers on-shift at a given point in time, rather than the total non-resident workforce.

Table 1 Non-resident population, Surat Basin LGAs, as at June

LGA	2021	2022	Change, 2021 to 2022	
	— persons —	persons	persons	%
Maranoa	865	815	–50	–6
Toowoomba	120	170	55	45
Western Downs	2,640	2,525	–115	–4
SURAT BASIN TOTAL	3,625	3,510	–110	–3

Figures in tables in this report have been rounded to the nearest five; see Notes at end of report for details.

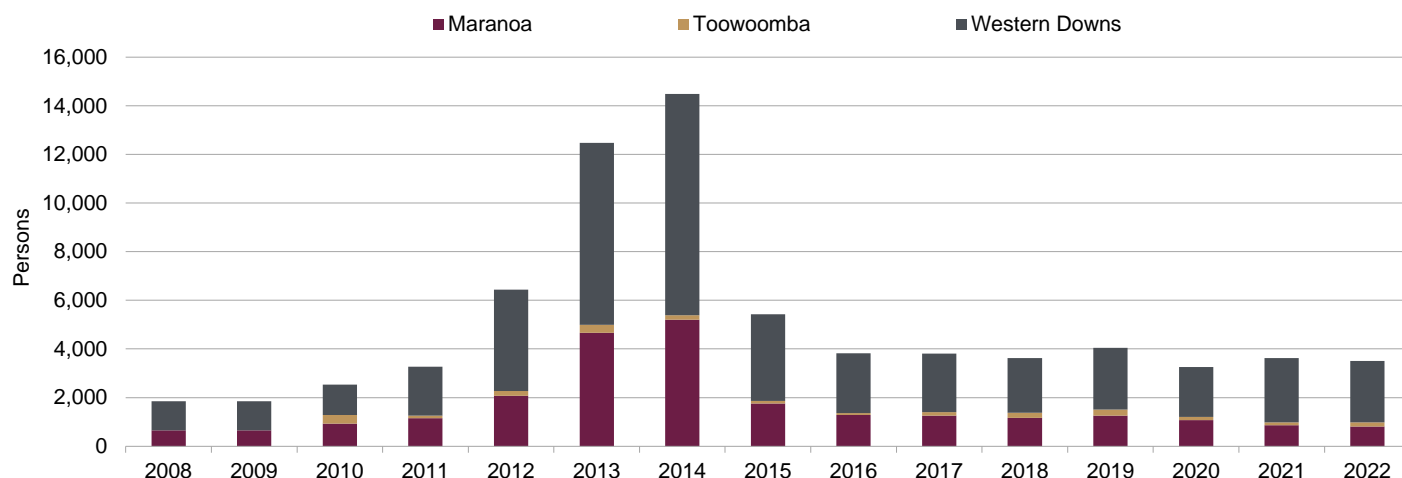
Source: QGSO estimates

As Figure 2 shows, the non-resident population of the Surat Basin grew from 1,855 persons in 2008 to reach a peak of 14,490 persons in 2014. This steep increase reflects the size of large, temporary FIFO/DIDO workforces engaged in construction of major pipeline and gas processing infrastructure for the three large CSG operators—APLNG, GLNG and QCLNG. The non-resident population decreased rapidly to 5,425 persons in 2015, as construction workforces were replaced by smaller operational workforces.

Since 2016, the number of non-resident workers on-shift in the Surat Basin has remained comparatively stable, at between 3,260 and 4,040 persons. Over this time, the region's baseline non-resident population has largely comprised the ongoing production, drilling and maintenance workforces of the major CSG projects, with development activity focused on progressively expanding gas field capacity to sustain gas supply. Compared with the construction phase, the scale of these gas development activities has been relatively limited. Workers associated with smaller gas companies and other activities including renewable energy projects, power station maintenance, coal mining, road and rail works have also contributed to the non-resident population over this period.

In June 2021 and June 2022, the Surat Basin's non-resident population included a sizeable number of workers engaged in renewable energy project construction in Western Downs, with CSG development also contributing additional numbers. CSG production, drilling and routine maintenance workforces continued to account for most of the non-resident population in these years, with smaller numbers associated with power stations, coal mines, road and rail works.

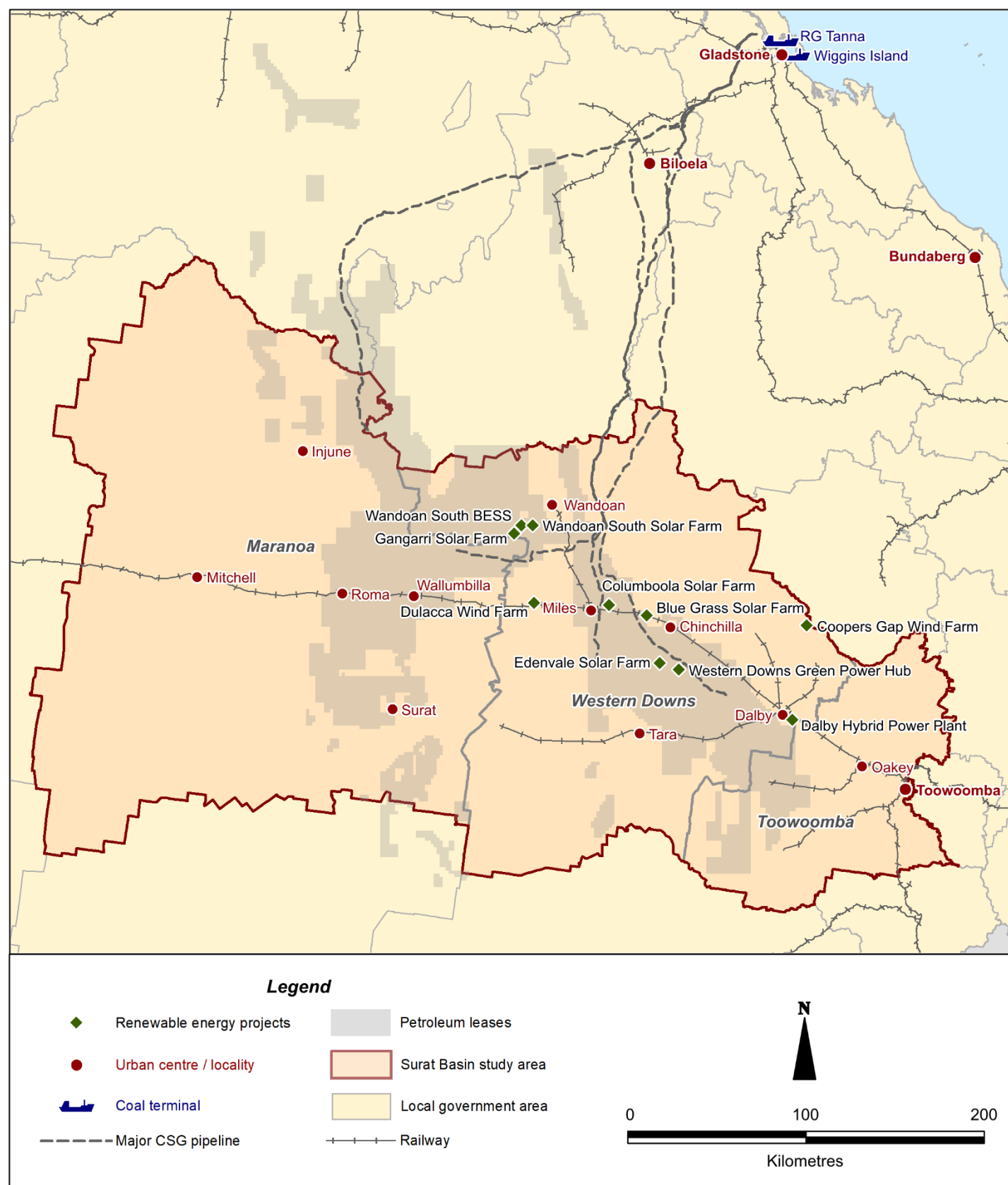
The small decline in the region's non-resident population in the year to June 2022 was due largely to a reduction in the number of renewable energy construction workers in Western Downs. Some projects that were under construction in June 2021 had reached the testing and commissioning phase by June 2022, while construction continued at other sites. Two new renewable energy projects also commenced construction during the year. Construction of renewable energy projects typically takes one to two years. On completion, the large, temporary construction workforces of these projects will be replaced by smaller, locally-resident operational workforces.

Figure 2 Non-resident population, Surat Basin LGAs, as at June

Note: Estimates for 2008 do not include Toowoomba LGA. Data for the Surat Basin were not collected in 2009 and estimates are extrapolated from 2008 data.

Source: QGSO estimates

Figure 3 Surat Basin study area^(a)



(a) Includes renewable energy projects under construction as at June 2022. Includes petroleum lease (PL) applications and PLs granted as at June 2022.

Source: QGSO, 2022

FTE population estimates

In June 2022, the Surat Basin had an estimated FTE population of 227,075 persons, comprising 223,565 residents and 3,510 non-resident workers on-shift (Table 2). Non-resident workers on-shift represented less than 2% of the region's FTE population.

At the LGA level, Toowoomba had the region's largest FTE population (176,410 persons), with the non-resident component comprising less than 1% of the total. Non-resident workers on-shift accounted for 7% of Western Downs's FTE population of 36,900 persons and 6% of Maranoa's FTE population of 13,765 persons.

Several urban centres and localities (UCLs) in the Surat Basin housed non-resident workers on-shift in June 2022. The four UCLs with the largest non-resident populations were in Western Downs—Chinchilla (955 persons), Dalby (280 persons), Miles (220 persons) and Wandoan (145 persons). In Maranoa, the UCL with the largest non-resident population was Roma (80 persons).

In June 2022, 1,870 non-resident workers on-shift in the Surat Basin were counted in town (53% of the total), compared with 1,640 persons (or 47%) in rural areas. This distribution varied across the three LGAs. In Maranoa, comparatively few non-resident workers on-shift were counted in town (100 persons or 12%), whereas in Western Downs, most workers stayed in town (1,600 persons or 63%). All non-resident workers on-shift in Toowoomba were counted in town.

Full-time equivalent population

The FTE population measure is the sum of the resident population (people who live in the area permanently) and the non-resident population (i.e. the number of non-resident workers on-shift).

The FTE population measure provides a more complete estimate of total demand for certain services and infrastructure in regions with a high incidence of FIFO/DIDO workers.

Table 2 FTE population estimates, Surat Basin LGAs and selected UCLs, June 2022

LGA	Location ^(a)	UCL	Resident population ^(b)	Non-resident population	FTE population
			— persons —		
Maranoa	In town	Roma	6,925	80	7,000
		Other towns ^(c)	1,745	20	1,765
	Rural areas		4,280	715	4,995
Maranoa total			12,950	815	13,765
Toowoomba	In town	Millmerran	1,390	30	1,425
		Toowoomba	109,615	110	109,725
		Other towns ^(c)	39,765	30	39,800
	Rural areas		25,465	0	25,465
Toowoomba total			176,240	170	176,410
Western Downs	In town	Chinchilla	6,370	955	7,325
		Dalby	12,335	280	12,615
		Miles	1,370	220	1,595
		Wandoan	405	145	550
		Other towns ^(c)	2,320	0	2,320
	Rural areas		11,575	925	12,500
Western Downs total			34,375	2,525	36,900
SURAT BASIN TOTAL			223,565	3,510	227,075

(a) Refer to Notes at end of report for explanation of 'in town' and 'rural areas'.

(b) QGSO unpublished data – provisional and subject to revision.

(c) UCLs with only one accommodation provider or fewer than 20 non-resident workers are aggregated in 'Other towns'.

Source: QGSO estimates

Non-resident population distribution

Since the transition from construction to production, non-resident population change and distribution in the LGAs of Maranoa and Western Downs has been driven by different influences. As Figure 4 shows, the non-resident population of Western Downs has exceeded that of Maranoa each year since 2016. Most of the region's non-resident population during the construction phase from 2012 to 2015 was based in Western Downs rather than Maranoa, due to the location of

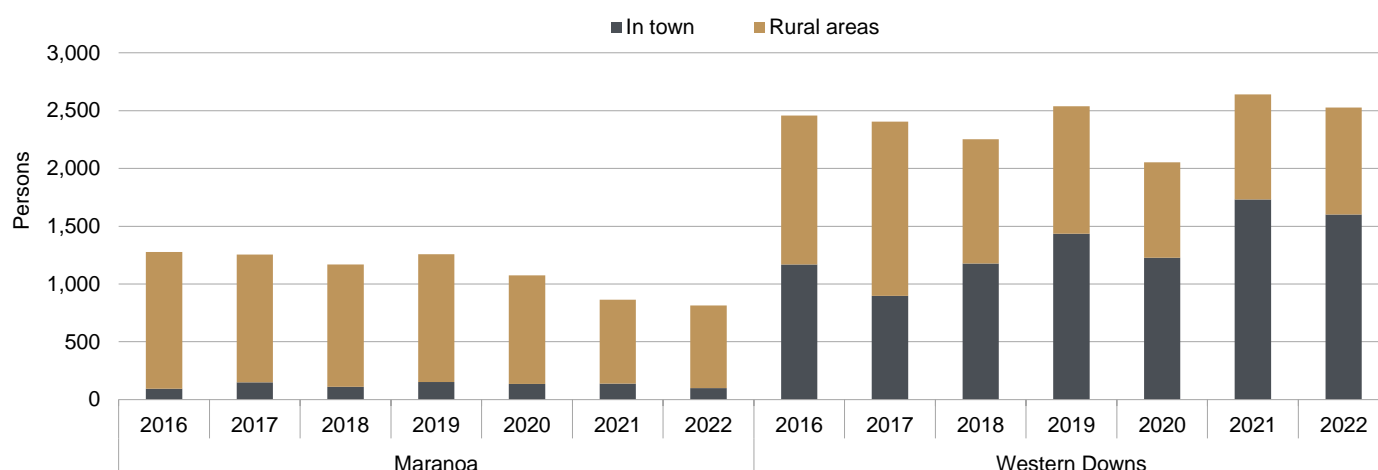
major CSG pipelines and other gas infrastructure (Figure 3). Consequently, the number of non-resident workers on-shift engaged in ongoing CSG operations has also been larger in Western Downs than in Maranoa.

Resource activity in Maranoa is primarily associated with the CSG industry, with most of the non-resident population engaged in CSG operations, gas gathering, drilling and maintenance activities. In contrast, the non-resident population of Western Downs has been subject to a range of influences in addition to the CSG industry, with coal mines, power stations and renewable energy projects located in the LGA.

The non-resident population of Maranoa has decreased overall, from 1,280 persons in June 2016 to 815 persons in June 2022 (–465 persons or –36%) as the number of gas workers reduced. Part of this decline can be attributed to the concurrent expansion of GLNG's gas fields in the Bowen Basin in recent years. Compared with Maranoa, the non-resident population of Western Downs has been more variable, ranging from 2,055 persons (June 2020) up to 2,640 persons (June 2021). Western Downs' baseline non-resident population largely comprises CSG operations, drilling and maintenance workforces, with annual fluctuations since 2016 mostly due to CSG development and renewable energy construction activities. Low gas prices and COVID-19 contributed to reduced numbers in both LGAs in 2020.

In Maranoa, the majority of non-resident workers on-shift have stayed in rural areas since 2016, due to the remote location of most gas industry activity in the LGA. In contrast, in Western Downs, the relative proximity of CSG operations and resource projects to population centres has enabled greater use of in-town accommodation by non-resident workers.

Figure 4 Non-resident population by location^(a), Maranoa and Western Downs LGAs, as at June



(a) Refer to Notes at end of report for explanation of 'in town' and 'rural areas'.

Source: QGSO estimates

Non-resident worker accommodation

WAVs are the main accommodation type used in the Surat Basin, accounting for approximately eight in ten of the non-resident workers on-shift in the region in June 2022 (2,750 persons or 78%). The balance of the non-resident population (760 persons or 22%) stayed in other accommodation such as hotels/motels and caravan parks (Table 3).

The number of non-resident workers on-shift counted in WAVs in the Surat Basin decreased by 135 persons between June 2021 and June 2022, while numbers in other accommodation grew by 25 persons.

At the LGA level, Western Downs recorded a comparatively large decline in the number of non-resident workers on-shift in WAVs (–125 persons) in the year to June 2022, which outweighed a small increase in other accommodation (15 persons). Decreased WAV usage was associated with a reduction in the number of renewable energy construction workers, as some projects progressed to the testing and commissioning phase. In Maranoa, the non-resident population declined in both WAVs (–10 persons) and other accommodation (–45 persons) over this period.

Worker accommodation villages (WAVs)

WAVs are commonly used to house non-resident workers on-shift. WAVs typically consist of demountable dwellings arranged in a village, with common dining, laundry and recreational facilities.

Table 3 Non-resident population by accommodation type, Surat Basin LGAs, as at June

LGA	WAVs	Other ^(a)	Total	WAVs	Other ^(a)	Total
	2022			Change, 2021–22		
	— persons —					
Maranoa	730	80	815	–10	–45	–50
Toowoomba ^(b)	0	170	170	0	55	55
Western Downs	2,020	510	2,525	–125	15	–115
SURAT BASIN TOTAL	2,750	760	3,510	–135	25	–110

(a) 'Other' includes hotels/motels, caravan parks and other accommodation. Refer to Notes at end of report for additional information.

(b) There were no WAVs located in Toowoomba in June 2021 or June 2022.

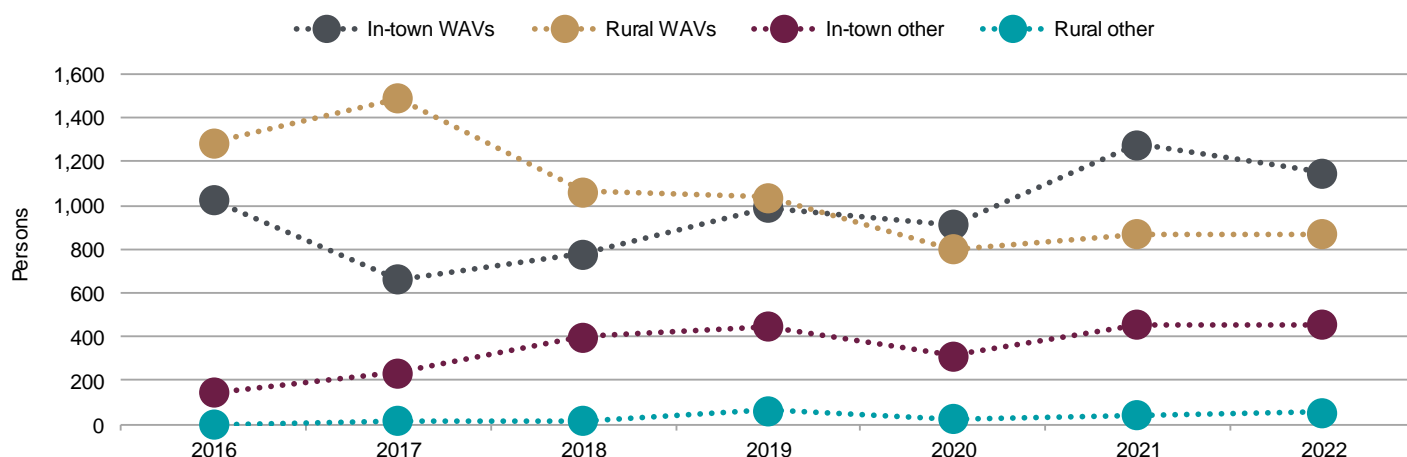
Source: QGSO estimates

In the Surat Basin, WAVs located in rural areas generally have different characteristics from those located in town. Rural WAVs are usually occupied by a single CSG company and/or its contractors. They include permanent and temporary company-operated camps, and small mobile camps located near drilling rigs. In contrast, in-town WAVs in the Surat Basin are generally commercially operated businesses available to a broader clientele. In addition to CSG production, drilling and maintenance workers, these include renewable energy construction, coal mine and power station workers.

In Western Downs, WAVs are situated in both rural areas and in town, while other accommodation such as hotels and motels are mostly located in town. The distribution of non-resident workers on-shift varies from year to year, driven mainly by the needs of CSG companies in response to changes in the type and location of CSG activity. In addition, policies encouraging use of in-town accommodation for gas operations have also influenced the choice of accommodation.

As Figure 5 shows, most non-resident workers on-shift in Western Downs from 2016 to 2018 stayed in rural WAVs. In 2019, the number in rural WAVs (1,040 persons) continued to exceed the number in in-town WAVs (990 persons), but by a much smaller margin. Since 2020, in-town WAVs have surpassed rural WAVs to become the main accommodation type used by non-resident workers in Western Downs. Overall, usage of other in-town accommodation has increased considerably between 2016 and 2022, while the number of non-resident workers on-shift in other accommodation in rural areas has remained small and relatively stable over this same period.

In both June 2021 and June 2022, renewable energy construction and CSG development activity in Western Downs contributed to substantial numbers of non-resident workers on-shift in in-town WAVs. Most renewable energy projects in Western Downs are situated close enough to nearby urban centres and localities for construction crews to stay in town while rostered on for work. A decrease in usage of in-town WAVs over the year to June 2022 (–130 persons) was largely due to reduced numbers of renewable energy construction workers.

Figure 5 Non-resident population by accommodation type^(a) and location^(b), Western Downs LGA, as at June

(a) 'Other' includes hotels/motels, caravan parks and other accommodation. Refer to Notes at end of report for additional information.

(b) Refer to Notes at end of report for explanation of 'in town' and 'rural areas'.

Source: QGSO estimates

In relation to other accommodation usage, the proportion of vacant and available hotel/motel rooms in the Surat Basin declined in 2021–22. Around 24% of hotel/motel rooms were vacant and available in June 2022, down from the proportions in June 2021 (37%) and June 2020 (51%) (Table 4). Many hotels/motels across the region reported that business had improved following the easing of travel restrictions related to COVID-19, with increased demand from tourists and other travellers.

At the LGA level, Toowoomba recorded a substantial reduction in the proportion of hotel/motel rooms that were vacant and available, falling from 45% in June 2021 to 21% in June 2022. This can be attributed to greater usage by FIFO/DIDO workers on top of increased demand from other guests. Availability decreased slightly in Western Downs (from 33% in June 2021 to 31% in June 2022), partly due to continuing demand from renewable energy construction and other FIFO/DIDO workers. In Maranoa, the proportion of hotel/motel rooms that were vacant and available remained stable over this period (21%), with greater demand from other guests making up for a reduced number of FIFO/DIDO workers.

Table 4 Vacant and available hotel/motel rooms, Surat Basin LGAs, as at June

LGA	Occupied by non-resident workers	Vacant and available ^(a)	Balance ^(a)	Total hotel/motel rooms ^(a)	Vacant and available hotel/motel rooms		
	2022				2020	2021	2022
	— rooms —				— % —		
Maranoa	80	140	440	660	50	21	21
Toowoomba	105	390	1,410	1,905	56	45	21
Western Downs	365	340	405	1,110	44	33	31
SURAT BASIN TOTAL	550	870	2,255	3,675	51	37	24

(a) Refer to Notes at end of report for explanation of 'vacant and available' and 'balance'.

Source: QGSO estimates

Table 5 Existing resource operations and projects under construction^(a), Surat Basin, June 2022

Category	Operation / project name	Company name	LGA
CSG	APLNG Drilling and Completions	APLNG ^(b)	Maranoa, Western Downs
CSG	APLNG Surat Operations and Gas Gathering	APLNG	Maranoa, Western Downs
CSG	Arrow Energy Surat Operations	Arrow Energy	Toowoomba, Western Downs
CSG	Atlas	Senex Energy	Western Downs
RE	Blue Grass Solar Farm	X-Elio Australia	Western Downs
RI	Braemar 2 Power Station	Arrow Energy	Western Downs
RI	Braemar Power Station	Alinta Energy	Western Downs
CM	Cameby Downs Mine	Yancoal Australia	Western Downs
RE	Columboola Solar Farm	Hana Financial Investment	Western Downs
CM	Commodore Mine	Millmerran Power Partners	Toowoomba
RI	Condamine Power Station	QGC	Western Downs
RE	Coopers Gap Wind Farm	AGL Energy	Western Downs
RI	Daandine Power Station	Energy Infrastructure Investments	Western Downs
RE	Dalby Hybrid Power Plant	FRV Australia	Western Downs
RI	Darling Downs Power Station	Origin Energy	Western Downs
CSG	Denison South (Yellowbank)	Denison Gas	Maranoa
RE	Dulacca Wind Farm	Octopus Australia	Western Downs
RE	Edenvale Solar Park	Sapphire Energy	Western Downs
RE	Gangarri Solar Farm	Shell Energy	Western Downs
CSG	GLNG Drilling and Completions	GLNG ^(c)	Maranoa, Western Downs
CSG	GLNG Surat Operations and Gas Gathering	GLNG	Maranoa, Western Downs
CSG	Kincora Project	Armour Energy	Maranoa
CM	Kogan Creek Mine	CS Energy	Western Downs
RI	Kogan Creek Power Station	CS Energy	Western Downs
RI	Millmerran Power Station	InterGen	Toowoomba
RI	Oakey Power Station	Shell Energy	Toowoomba
CSG	QCLNG Drilling and Completions	QCLNG ^(d)	Western Downs
CSG	QCLNG Surat Operations and Gas Gathering	QCLNG	Western Downs
CSG	Roma North	Senex Energy	Maranoa
RI	Roma Power Station	Origin Energy	Maranoa
CSG	Surat Gas Project	Arrow Energy	Toowoomba, Western Downs
RE	Wandoan South BESS	Vena Energy	Western Downs
RE	Wandoan South Solar Project	Vena Energy	Western Downs
RE	Western Downs Green Power Hub	Neoen Australia	Western Downs

CM = coal mine CSG = coal seam / conventional gas RE = renewable energy RI = related infrastructure

(a) Includes gas operations, coal mining operations, resource industry-related infrastructure, and projects under construction as at June 2022. Operations that have ceased production or were in care and maintenance, including New Acland Mine in Toowoomba LGA, are not included in this list.

(b) Australia Pacific LNG (APLNG) is a joint venture between Origin Energy, ConocoPhillips and Sinopec.

(c) Santos Gladstone LNG (GLNG) is a joint venture between Santos, PETRONAS, Total and KOGAS.

(d) Queensland Curtis LNG (QCLNG) is a joint venture between QGC, CNOOC and Tokyo Gas.

Source: QGSO 2022

Notes

LGA – local government area UCL – urban centre and locality

Place names refer to local government areas unless otherwise specified.

Data in this report are derived from surveys conducted by QGSO in 2022 and other sources. The Survey of Accommodation Providers counted non-resident workers staying in worker accommodation villages (WAVs), hotels/motels, caravan parks and other commercial accommodation on a medium to long-term basis during the last week of June 2022. Short-term and overnight visitors are not regarded as non-resident workers. The Resource Employment Survey collected workforce information from all resource companies with existing operations and projects in the Surat Basin as at June 2022.

Non-resident workers are people who fly-in/fly-out or drive-in/drive-out (FIFO/DIDO) to work and live in the area temporarily while rostered on, and who have their usual place of residence elsewhere. This group includes employees, contractors and associated sub-contractors employed in construction, production, and maintenance at mining and gas industry operations and projects, renewable energy projects and resource related infrastructure. Figures in this report refer to the number of non-resident workers on-shift or present in the area at a given point in time and should not be confused with total non-resident workforce numbers.

Non-resident population data presented in this report are a point-in-time measure, based on the best information available at the time of the surveys. Non-resident worker numbers may vary in response to changing production demands, prevailing weather and industrial disputes. At the time of the 2022 surveys, the number of non-resident workers on-shift in the Surat Basin was unaffected by widespread adverse weather events or industrial action.

Resident population estimates for 2022 are unpublished QGSO estimates, which are provisional and subject to revision.

'In town' includes populations counted in defined urban centres and localities (UCLs), as well as non-resident workers housed within 5km of town. 'Rural areas' include populations outside of defined UCLs, including non-resident workers more than 5km from town.

'Other' accommodation includes hotels, motels, caravan parks and other private rental accommodation.

'Vacant and available' refers to hotel/motel rooms that were not occupied by non-resident workers or other guests and were vacant and available on the night of the survey. 'Balance' includes hotel/motel rooms occupied by short-term visitors, held for non-resident workers under permanent booking arrangements although not actually occupied on the night of the survey, or otherwise unavailable to prospective guests.

Figures in tables have been rounded to the nearest five. As a result of rounding, discrepancies may occur between sums of the component items and totals. Percentages and other calculations are made prior to rounding of figures and discrepancies might therefore exist between these calculations and those that could be derived from the rounded figures.

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