Bowen Basin population report, 2014

Introduction

The Bowen Basin population report, 2014 (the report) provides estimates of the non-resident population of fly-in/fly-out and drive-in/drive-out (FIFO/DIDO) workers who were on-shift in the region during the last week of June 2014. Information regarding the supply and take-up of commercial accommodation utilised by these workers is also summarised.

The Bowen Basin’s non-resident population presented in this report comprises people working in the mining and gas industries, construction workers, and associated sub-contractors. Non-resident workers are not included in estimated resident population (ERP) data released annually by the Australian Bureau of Statistics. As a result, the full–time equivalent (FTE) population estimates presented in this report, which combine the resident and non-resident populations, provide a more complete indicator of total demand for certain services than either measure used alone.

Key findings

Key findings of this report include:

- Around 16,355 non-resident workers on-shift were counted in the Bowen Basin at the end of June 2014. This was 6,545 (or 29%) fewer workers than in June 2013, and 8,680 less than in June 2012.

- This downturn in the non-resident worker population signals an end to the expansion of mine capacity that started in the Bowen Basin in 2010–11. The region’s non-resident population in June 2014 was slightly higher than the level seen in 2010 (14,615 persons).

- Completion of mine construction, mine closures and workforce restructuring in the coal industry contributed to this decline in the region’s non-resident worker population. Numbers were further reduced as coal seam gas (CSG) pipeline construction and civil works projects in the southern Bowen Basin were finalised in 2013–14.

- The number of non-resident workers on-shift fell by 3,865 (or 26%) in Isaac (R), while numbers also fell by 1,325 (or 48%) in Banana (S) and 1,365 (or 29%) in Central Highlands (R). Whitsunday (R) (Bowen only) was the only LGA to record limited change in its non-resident population (460 persons in 2013 and 465 in 2014).

- An estimated 15,460 non-resident workers on-shift (or 95% of the total) were housed in worker accommodation villages (WAVs) across the Bowen Basin in June 2014, around 5,745 persons (or 27%) fewer than in June 2013.

- There were 63 WAVs in operation across the Bowen Basin in June 2014, a net loss of 16 establishments from June 2013. Along with some permanent facilities, WAVs that closed in 2013–14 included temporary construction facilities for new mines and civil works, pipeline construction camps, and a large number of small CSG drilling camps.

- The total capacity of Bowen Basin WAVs in June 2014 was estimated at 28,210 beds, a decrease of 4,285 beds or 13% from June 2013. While closures accounted for much of this decrease, some WAVs also downsized room numbers.

- As a result of diminishing demand for worker accommodation, the proportion of hotel/motel rooms in the Bowen Basin that were vacant and available increased from 42% in June 2013 to 65% in June 2014.

1 Whitsunday (R) (Bowen only) comprises the statistical areas level 2 (SA2s) of Bowen and Collinsville, which cover the area of former Bowen Shire.
**Bowen Basin update, 2013–14**

The Bowen Basin in Central Queensland contains most of the state’s high quality metallurgical (coking and pulverised coal injection) coal reserves, as well as significant deposits of thermal coal. As at June 2014, there were 41 surface and underground coal operations in the region producing metallurgical and thermal coal principally for export (DNRM, 2014a).

Two new coal mines began production in the Bowen Basin in 2013–14. The large Caval Ridge mine (BHP Billiton Mitsubishi Alliance (BMA)) near Moranbah reached commercial production status ahead of schedule in early 2014, while the smaller Cows mine (QCoal) located south of Collinsville also commenced operations. Construction of the Kestrel (Underground) mine expansion project (Rio Tinto Coal Australia) was completed in July 2013, while production at BMA’s Daunia mine reached full capacity in 2013–14 (BHP Billiton, 2014a). Construction continued on two new coal projects near Moranbah—Grosvenor mine (Anglo American)) and Eagle Downs mine (Eagle Downs Coal Management)).

Two Bowen Basin coal mines ceased production in 2013–14. The German Creek–Aquila mine (Anglo American) was placed into care and maintenance in July 2013 on economic grounds (Anglo American, 2013). Collinsville mine (NCA Joint Venture) closed in September 2013, but subsequently reopened in January 2014 and has since resumed production (Glencore, 2014). Despite these closures, the commencement of new mines and expansion of existing operations in the Bowen Basin contributed to increased production of coal in 2013–14. The region’s largest producer of metallurgical coal reported saleable production volumes of 37.6M tonnes for YTD June 2014, some 26% higher than production for the preceding year (BHP Billiton, 2014b).

The total production, maintenance and construction workforces reported for coal operations and projects in the Bowen Basin fell from 36,670 in June 2013 to 33,060 in June 2014 (DNRM, 2014b). This net decline of 3,610 jobs includes production workforce losses arising from mine closures and industry restructuring, but also takes into account the completion of construction at Caval Ridge mine during the year. These losses were partially offset by new production workforces at Cows and Caval Ridge mines, and the ramp up of production at Daunia. Non-resident workers made up a substantial proportion of the workforces affected by these changes.

While the coal mining industry remains the largest employer of non-resident workers in the Bowen Basin, the non-resident population of the region is also subject to other influences.

- Recent years saw an influx of non-resident workers engaged in coal seam gas (CSG) drilling and pipeline construction projects. These workers were largely housed in temporary worker accommodation villages and mobile camps located in rural areas of Central Highlands (R) and Banana (S), but also occupied hotel/motel and caravan park accommodation in nearby towns. The size of this non-resident CSG workforce fell considerably between June 2013 and June 2014 following completion of pipeline construction and relocation of drilling activity.
  - In 2013–14, a sizeable number of non-resident workers were engaged in road and civil infrastructure construction projects in the south of Central Highlands (R) and Banana (S). Many of these projects were completed by June 2014.
  - The Mt Carlton gold, copper and silver mine (Evolution Mining) commenced commercial production in July 2013. The mine, which is located north-west of Collinsville in Whitsunday (R), employs a mix of local residents and non-resident workers (Evolution Mining, 2014).

**Non–resident workers on–shift**

According to Queensland Government Statistician’s Office (QGSO) estimates, there were 16,355 non–resident workers on–shift in the Bowen Basin at the end of June 2014 (Table 1). More than two-thirds of these (11,085 persons, or 68% of the regional total) were counted in the LGA of Isaac (R), with the remainder located in Central Highlands (R) (3,380 persons), Banana (S) (1,425 persons) and Whitsunday (R) (Bowen only) (465 persons).

The number of non–resident workers on–shift in the region declined by 6,545 persons (or 29%) in the year to June 2014. With the exception of Whitsunday (R) (Bowen only), all LGAs recorded non–resident population decreases over this period. The largest decline occurred in Isaac (R) (3,865 persons), while Banana (S) and Central Highlands (R) recorded losses of 1,325 persons and 1,365 persons respectively.

The transition of Caval Ridge mine from construction to production was a significant factor in the decrease experienced in Isaac (R), along with mine closures and workforce restructuring. In contrast, most losses of non-resident workers in Banana (S) and Central Highlands (R) were due to finalisation of CSG pipeline construction and, to a lesser extent, mine expansion and road and infrastructure construction projects reaching completion.

Contrary to the regional trend, the number of non–resident workers on–shift in Whitsunday (R) (Bowen only) remained relatively stable over this period, with gold mining activity offsetting the coal industry downturn.
Table 1: Non–resident workers on–shift, Bowen Basin LGAs, June

<table>
<thead>
<tr>
<th>LGA</th>
<th>2013 number</th>
<th>2014 number</th>
<th>Change, 2013-2014</th>
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<tbody>
<tr>
<td>Banana (S)</td>
<td>2,750</td>
<td>1,425</td>
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<tr>
<td>Central Highlands (R)</td>
<td>4,740</td>
<td>3,380</td>
<td>−1,365</td>
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<tr>
<td>Isaac (R)</td>
<td>14,950</td>
<td>11,085</td>
<td>−3,865</td>
</tr>
<tr>
<td>Whitsunday (R) (Bowen only)</td>
<td>460</td>
<td>465</td>
<td>5</td>
</tr>
<tr>
<td><strong>BOWEN BASIN TOTAL</strong></td>
<td>22,900</td>
<td>16,355</td>
<td>−6,545</td>
</tr>
</tbody>
</table>

Figures in all tables have been rounded to the nearest five; see notes for details.
Source: QGSO estimates

As time series data in Figure 2 illustrate, the number of non–resident workers on–shift in the Bowen Basin has increased overall since monitoring began in 2006. These data are indicative of the significant expansion of coal mining activity that occurred in the Bowen Basin over the past decade, and also reflect the increasing utilisation of FIFO/DIDO workforces in resource industry construction and production.

Following a period of relatively slow growth from 2006 to 2010 (increasing from 10,765 to 14,615 persons) the Bowen Basin’s non-resident population entered a phase of rapid expansion, culminating in a peak of 25,035 persons in 2012. The presence of large construction workforces engaged in the construction of new mines, mine expansions and related infrastructure projects contributed to substantial increases in the number of non–resident workers on–shift over this period. As shown in Figure 2, the majority of this growth occurred in the LGAs of Isaac (R) and Central Highlands (R).

Much of the decline in the non-resident population since 2012, and particularly since 2013, is due to the completion of these construction and expansion projects and the departure of large, temporary workforces from the region. Mine closures and workforce restructuring across the coal industry in response to softening prices also contributed to this downturn. The LGAs with the highest levels of coal industry activity, Isaac (R) and Central Highlands (R), were most significantly affected.

During the year to June 2013, some of the changes noted above were offset temporarily by large numbers of non-resident workers associated with the CSG industry and pipeline construction. The presence of these workers boosted the non-resident population of Banana (S) and largely offset coal–related non–resident population losses in Central Highlands (R). As a result, the downturn in the Bowen Basin’s non-resident population between 2012 and 2013 was less than might otherwise have occurred. Completion of these projects in 2013–14 contributed to the notable decline in non–resident workers on–shift in these LGAs during the year to June 2014.

Considering these recent growth influences, and seen in this longer term context, the Bowen Basin’s non–resident population levels in 2014 may be interpreted as a return toward trend following a period of unusually high growth, rather than a significant downturn. To illustrate this further, the region’s non-resident population of 16,355 persons in June 2014 was slightly higher than the pre-peak level of 2010 (14,615 persons).

Figure 2: Non–resident workers on–shift, Bowen Basin LGAs, June

Source: QGSO estimates
Figure 3: Bowen Basin LGAs and selected UC/Ls

Source: QGSO, 2012
Full–time equivalent (FTE) population estimates

In June 2014, the Bowen Basin had an estimated FTE population of 101,605 persons, comprising 85,250 residents and 16,355 non–resident workers on–shift (Table 2). Non–resident workers made up 16% of the region’s FTE population.

At the LGA level, Isaac (R) had the largest FTE population (35,845 persons), with 11,085 non–resident workers on–shift accounting for 31% of the total. The FTE population of Central Highlands (R) (34,880 persons) approached that of Isaac (R), but with a smaller proportion of non–resident workers on–shift (3,380 persons or 10% of FTE).

Four urban centres and localities (UC/Ls) had non–resident populations of 1,000 or more in 2014—Moranbah (2,130 persons), Dysart (1,735 persons), Blackwater (1,365 persons) and Middlemount (1,310 persons). The non–resident population of rural areas in Isaac (R) was 5,270 persons, only slightly less than the resident population (5,605 persons). This reflects the location of several large WAV establishments outside of town centres.

Table 2: FTE population estimates, Bowen Basin LGAs and selected UC/Ls, June 2014

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<td>Rural areas</td>
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<td>820</td>
<td>6,310</td>
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<td><strong>Banana (S) total</strong></td>
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<td></td>
<td><strong>15,100</strong></td>
<td><strong>1,425</strong></td>
<td><strong>16,525</strong></td>
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<td>In town</td>
<td>Blackwater</td>
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<td>Bluff</td>
<td>410</td>
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<td>Tieri</td>
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<td>Rural areas</td>
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<td><strong>Central Highlands (R) total</strong></td>
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<td>5,030</td>
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<td>Gienden</td>
<td>1,435</td>
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<td>Middlemount</td>
<td>2,085</td>
<td>1,310</td>
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<td>Moranbah</td>
<td>9,455</td>
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<td>11,585</td>
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<td>Nebo</td>
<td>500</td>
<td>335</td>
<td>835</td>
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<td>Other towns[^5]</td>
<td></td>
<td>2,390</td>
<td>10</td>
<td>2,400</td>
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<tr>
<td></td>
<td>Rural areas[^6]</td>
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<td>5,605</td>
<td>5,270</td>
<td>10,870</td>
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<td><strong>Isaac (R) total</strong></td>
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<td><strong>24,755</strong></td>
<td><strong>11,085</strong></td>
<td><strong>35,845</strong></td>
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<td>Whitsunday (R) (Bowen only)</td>
<td>In town</td>
<td>Collinsville</td>
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<td>1,905</td>
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<tr>
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<td>Other towns[^5]</td>
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<td>9,965</td>
<td>10</td>
<td>9,970</td>
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<tr>
<td></td>
<td>Rural areas</td>
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<td>2,350</td>
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<td>2,480</td>
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<td><strong>Whitsunday (R) (Bowen only) total</strong></td>
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<td><strong>13,890</strong></td>
<td><strong>465</strong></td>
<td><strong>14,355</strong></td>
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<td><strong>BOWEN BASIN TOTAL</strong></td>
<td></td>
<td></td>
<td><strong>85,250</strong></td>
<td><strong>16,355</strong></td>
<td><strong>101,605</strong></td>
</tr>
</tbody>
</table>

[^4]: Refer to notes for explanation of ‘in town’ and ‘rural areas’.
[^5]: UC/Ls with only one accommodation provider or fewer than 20 non–resident workers are aggregated in ‘other towns’.
[^6]: The township of Coppabella in Isaac (R), which was treated as a UC/L in previous reports, is now included in rural areas.

Source: QGSO estimates

Full–time equivalent population

The FTE population measure is the sum of the resident population estimate (people who live in the area permanently) and the number of non–resident workers on–shift. The FTE population provides a better measure of total demand for certain services and infrastructure in regions with a high incidence of FIFO/DIDO workers.
Non–resident workers on–shift by location

The non–resident population of the Bowen Basin declined in town and rural areas between June 2013 and June 2014 (Figure 4). Rural areas experienced the largest decrease, falling from 11,360 to 7,420 persons (–3,940 persons or –35%). The non–resident population in town areas fell from 11,540 to 8,940 persons (–2,605 persons or –23%).

Large numbers of workers engaged in CSG pipeline construction and other construction activities temporarily boosted the non–resident populations of rural areas of Banana (S) and Central Highlands (R) in 2013. With these projects largely completed by June 2014, the non–resident rural population of these LGAs decreased significantly (Banana (S) –1,095 persons or –57%, Central Highlands (R) –985 persons or –45%). Isaac (R) experienced sizeable non–resident population losses both in town (–1,875 persons or –24%) and in rural areas (–1,990 persons or –27%) in the year to June 2014.

Figure 4: Non–resident workers on–shift by location, Bowen Basin LGAs, June

(a) Refer to notes for explanation of 'in town' and 'rural areas'.
Source: QGSO estimates

Non–resident worker accommodation

WAVs remain the predominant type of accommodation utilised by non–resident workers while on–shift in the Bowen Basin, housing 15,460 workers (or 95% of the total) in June 2014 (Table 3). Other types of accommodation, including hotels/motels and caravan parks, accounted for the remainder (895 persons or 5%).

The decline in the Bowen Basin’s non–resident population in the year to June 2014 resulted in reduced demand for worker accommodation of all types. The number of non–resident workers staying in WAVs fell by 5,745 persons (or –27%), while occupancy of other accommodation almost halved (–800 persons or –47%).

Table 3: Non–resident workers on–shift by accommodation type, Bowen Basin LGAs, June

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<tr>
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<tbody>
<tr>
<td>Banana (S)</td>
<td>1,270</td>
<td>160</td>
<td>1,425</td>
<td>–1,130</td>
<td>–195</td>
<td>–1,325</td>
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<tr>
<td>Central Highlands (R)</td>
<td>3,105</td>
<td>275</td>
<td>3,380</td>
<td>–1,195</td>
<td>–165</td>
<td>–1,365</td>
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<tr>
<td>Isaac (R)</td>
<td>10,665</td>
<td>420</td>
<td>11,085</td>
<td>–3,620</td>
<td>–245</td>
<td>–3,865</td>
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<tr>
<td>Whitsunday (R) (Bowen only)</td>
<td>425</td>
<td>40</td>
<td>465</td>
<td>200</td>
<td>–195</td>
<td>5</td>
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<tr>
<td><strong>BOWEN BASIN TOTAL</strong></td>
<td><strong>15,460</strong></td>
<td><strong>895</strong></td>
<td><strong>16,355</strong></td>
<td><strong>–5,745</strong></td>
<td><strong>–800</strong></td>
<td><strong>–6,545</strong></td>
</tr>
</tbody>
</table>

(a) ‘Other’ includes hotels/motels, caravan parks and other accommodation. Refer to notes for additional information on hotels/motels.
Source: QGSO estimates

Worker accommodation villages (WAVs)

WAVs are commonly used to house unaccompanied non–resident workers. WAVs typically consist of demountable dwellings arranged in a village, with common messing, laundry and recreational facilities. WAVs vary greatly in size and amenity, ranging from small, mobile drilling camps to well–established villages of up to several thousand beds with a high standard of services and facilities.
As Table 3 shows, all LGAs experienced a decline in the number of non–resident workers on–shift staying in other accommodation in 2013–14. Losses ranged from 165 persons (or −38%) in Central Highlands (R) to 245 persons (or −37%) in Isaac (R). The number of non–resident workers in other accommodation in Banana (S) and Whitsunday (R) (Bowen only) fell by more than half (−195 persons or −55%, and −195 persons or −63% respectively).

WAVs in Isaac (R) recorded a loss of 3,620 persons (or −25%) in the year to June 2014, accounting for more than half of the region’s total non–resident population decline (−6,545 persons). A large part of this downturn was due to completion of construction at Caval Ridge mine and the transition of that project to operational status, as well as downsizing of production workforces at other mines in the area. The reduction of non–resident worker numbers in WAVs was also substantial in Banana (S) (−1,130 persons or −47%) and Central Highlands (R) (−1,195 persons or −25%), reflecting the conclusion of CSG pipeline construction and completion of mine expansions.

There were 63 WAVs in operation across the Bowen Basin in June 2014, a net loss of 16 establishments from June 2013. Along with some permanent facilities, WAVs that closed in 2013–14 included temporary construction facilities for new mines and civil works, pipeline construction camps, and a large number of small CSG drilling camps. The total capacity of Bowen Basin WAVs in 2014 was estimated at 28,210 beds, a decrease of 4,285 beds or 13% from the previous year (Figure 5). The largest decline occurred in Isaac (R) (−1,845 beds), while Central Highlands (R) and Banana (S) also had substantial losses (−1,620 beds and −1,020 beds respectively). In addition to WAV closures, the decline in WAV bed capacity in the Bowen Basin resulted from some establishments downsizing in response to reduced demand. Despite this decrease, time series data show that total WAV bed capacity in 2014 still exceeded that for 2012 and preceding years.

As a result of diminishing demand for worker accommodation, the proportion of hotel/motel rooms in the Bowen Basin that were vacant and available increased from 42% in June 2013 to 65% in June 2014 (Table 4). The notable 36 percentage point increase in Banana (S) was largely due to the completion of road works and winding up of CSG industry activity, which had previously seen hotels/motels in towns picking up the overflow from WAVs in rural areas. Increased availability in Isaac (R) (24 percentage points) and Central Highlands (R) (22 percentage points) reflects lower levels of resource industry activity in general, with losses from hotels/motels in towns across both LGAs.

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As a result of diminishing demand for worker accommodation, the proportion of hotel/motel rooms in the Bowen Basin that were vacant and available increased from 42% in June 2013 to 65% in June 2014 (Table 4). The notable 36 percentage point increase in Banana (S) was largely due to the completion of road works and winding up of CSG industry activity, which had previously seen hotels/motels in towns picking up the overflow from WAVs in rural areas. Increased availability in Isaac (R) (24 percentage points) and Central Highlands (R) (22 percentage points) reflects lower levels of resource industry activity in general, with losses from hotels/motels in towns across both LGAs.
Notes
(R) – Regional Council (S) – Shire UC/L – Urban Centre/Locality
Data in this report are derived from surveys conducted by QGSO in 2014 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 2014. Short-term and overnight visitors are not regarded as non-resident workers. The Resource Operations Employment Survey collected workforce information from all resource companies with existing operations in the Bowen Basin as at June 2014.

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. Non-resident workers include FIFO/DIDO mining and gas industry employees and contractors, construction workers and associated sub-contractors. 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.

Data for non–resident workers on–shift presented in this report are a point in time measure, based on best information available at the time of survey. Non–resident worker numbers may vary in response to changing production demands, prevailing weather and industrial disputes. At the time of the 2014 survey, the number of non–resident workers on–shift in the Bowen Basin was unaffected by adverse weather events or industrial actions.

Resident population estimates for 2014 are QGSO estimates.
‘In town’ includes populations counted in defined urban centres and localities (UC/Ls) and non–resident workers on–shift within 5km of town.
‘Rural areas’ include populations outside of defined UC/Ls, including non-resident workers more than 5km from town. The township of Coppabella in Isaac (R), which was treated as a UC/L in previous reports, is now included in rural areas.

Hotels/motels include serviced apartments and other rental accommodation occupied by non-resident workers.
‘Vacant and available’ refers to hotel/motel rooms that were not occupied by non–resident workers on–shift 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 on–shift or other guests, and were vacant and available on the night of the survey.

There may be instances where non–resident workers are counted in more than one category. For example, non–resident workers who are also visitors may be captured in both categories.

‘Balance’ includes hotel/motel rooms occupied by short-term visitors, held for non–resident workers on–shift or other guests, and were vacant and available on the night of the survey.

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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