

Surat Basin population report, 2025

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, related infrastructure operations and renewable energy projects.

This report provides non-resident population estimates for the Surat Basin during the last week of June 2025. 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 derived primarily 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.

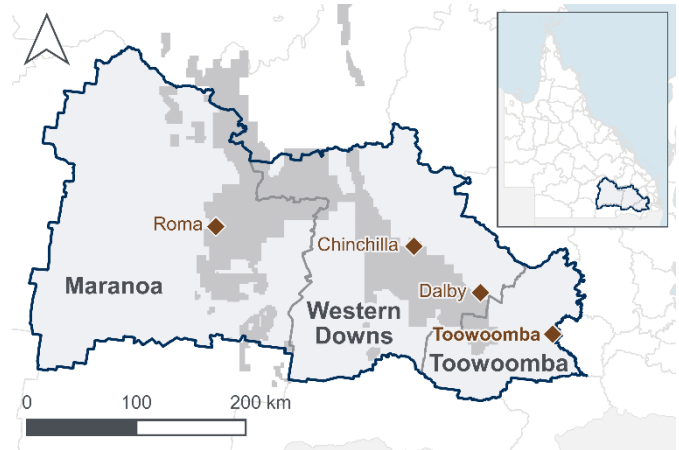
Key findings

Key findings of this report include:

- The Surat Basin had an estimated non-resident population of 3,925 persons in June 2025, around 280 persons (or +8%) higher than in June 2024.
- Overall change in the region's non-resident population in 2024–25 was due largely to CSG maintenance and development activity in Western Downs.
- Western Downs LGA contributed 64% (or 2,500 persons) of the Surat Basin's non-resident population in June 2025. Maranoa (1,210 persons or 31%) and Toowoomba (220 persons or 6%) made up the balance.
- Both Western Downs (+235 persons or +10%) and Toowoomba (+45 persons or 24%) experienced an increase in the non-resident population in the year to June 2025, while Maranoa's non-resident population was stable.
- The Surat Basin's full-time equivalent (FTE) population was estimated at 240,450 persons in June 2025, comprising 236,525 residents and 3,925 non-resident workers on-shift. Non-resident workers on-shift made up less than 2% of the region's FTE population.

continued

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 (CSG) production, thermal coal mining and electricity generation. The region comprises the local government areas (LGAs) of Maranoa, Western Downs and Toowoomba.

Estimated population at June 2025:

Non-resident population.....	3,925
Resident population.....	236,525
Full-time equivalent population.....	240,450

- In June 2025, almost three-quarters of non-resident workers in the Surat Basin were staying in WAVs while on-shift (2,845 persons or 72%), while the remainder (1,085 persons or 28%) were in other accommodation such as hotels/motels and caravan parks.
- Around half of the Surat Basin's non-resident population in June 2025 was counted in town (1,995 persons or 51%) rather than in rural areas. In Maranoa, most stayed in rural areas (975 persons or 81%), while in Western Downs, almost two-thirds were in town (1,540 persons or 62%).

Non-resident population

The Surat Basin (Figure 3, page 4) in southern Queensland is a major energy region and the state's main source of CSG production. CSG activity continues to provide most of the region's resource employment, with three large CSG to liquefied natural gas (LNG) projects—Australia Pacific LNG, Santos Gladstone LNG and Queensland Curtis LNG—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 4, page 8).

The non-resident population of the Surat Basin was estimated at 3,925 persons at the end of June 2025, up by 280 persons (or +8%) compared with June 2024 (Table 1).

Most of the region's non-resident population in June 2025 was in Western Downs (2,500 persons or 64%), with 31% in Maranoa (1,210 persons) and 6% in Toowoomba (220 persons).

In Western Downs, the non-resident population increased by 235 persons (+10%), largely due to CSG maintenance and development activity. The non-resident population of Toowoomba also increased, up by 24% (or 45 persons) to reach 220 persons in June 2025. Compared with the other Surat Basin LGAs, Toowoomba has a much smaller non-resident population, which in June 2025, largely comprised workers associated with the gas industry, coal mining, and power station operations. By comparison, the non-resident population of Maranoa in June 2025 (1,210 persons) was relatively unchanged compared with 2024, with CSG activity ongoing in the LGA.

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	2024		2025		Change, 2024 to 2025	
	— persons —		persons		%	
Maranoa	1,205	1,210	0	0		
Toowoomba	180	220	45	24		
Western Downs	2,260	2,500	235	10		
SURAT BASIN TOTAL	3,645	3,925	280	8		

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

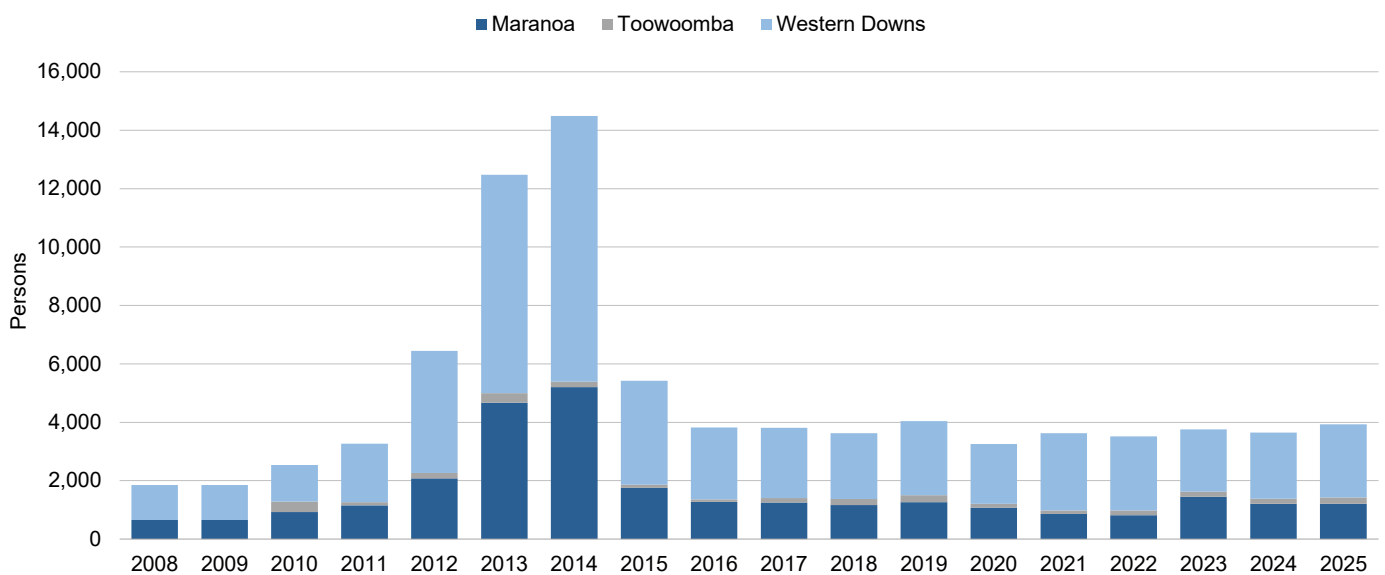
Source: QGSO estimates

As Figure 2 shows, the non-resident population of the Surat Basin grew rapidly from 3,265 persons in 2011 to reach a peak of 14,490 persons in 2014, before declining to 5,425 persons in 2015. This steep increase and rapid decline reflect the presence of large, temporary FIFO/DIDO workforces engaged in the construction of major infrastructure for three large CSG projects, and the subsequent transition from construction to production.

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 routine maintenance workforces of the major CSG projects. Construction of additional gas gathering infrastructure, gas expansion projects, and major maintenance events have also added to the number of non-resident workers on-shift in some years. Workers associated with smaller gas companies and other activities including renewable energy project construction, power station maintenance, coal mining, road and rail works have also contributed to the non-resident population since 2016. In particular, workers engaged in solar and wind farm construction in Western Downs have made a sizeable contribution to the region's non-resident population since 2021.

The modest increase in the Surat Basin's non-resident population in the year to June 2025 was due largely to CSG maintenance and development activity in Western Downs. As in recent years, the region's non-resident population in June 2025 largely comprised workers engaged in ongoing production, drilling and routine maintenance activities for the three major CSG projects. Ongoing renewable energy project construction in Western Downs also contributed to the non-resident population.

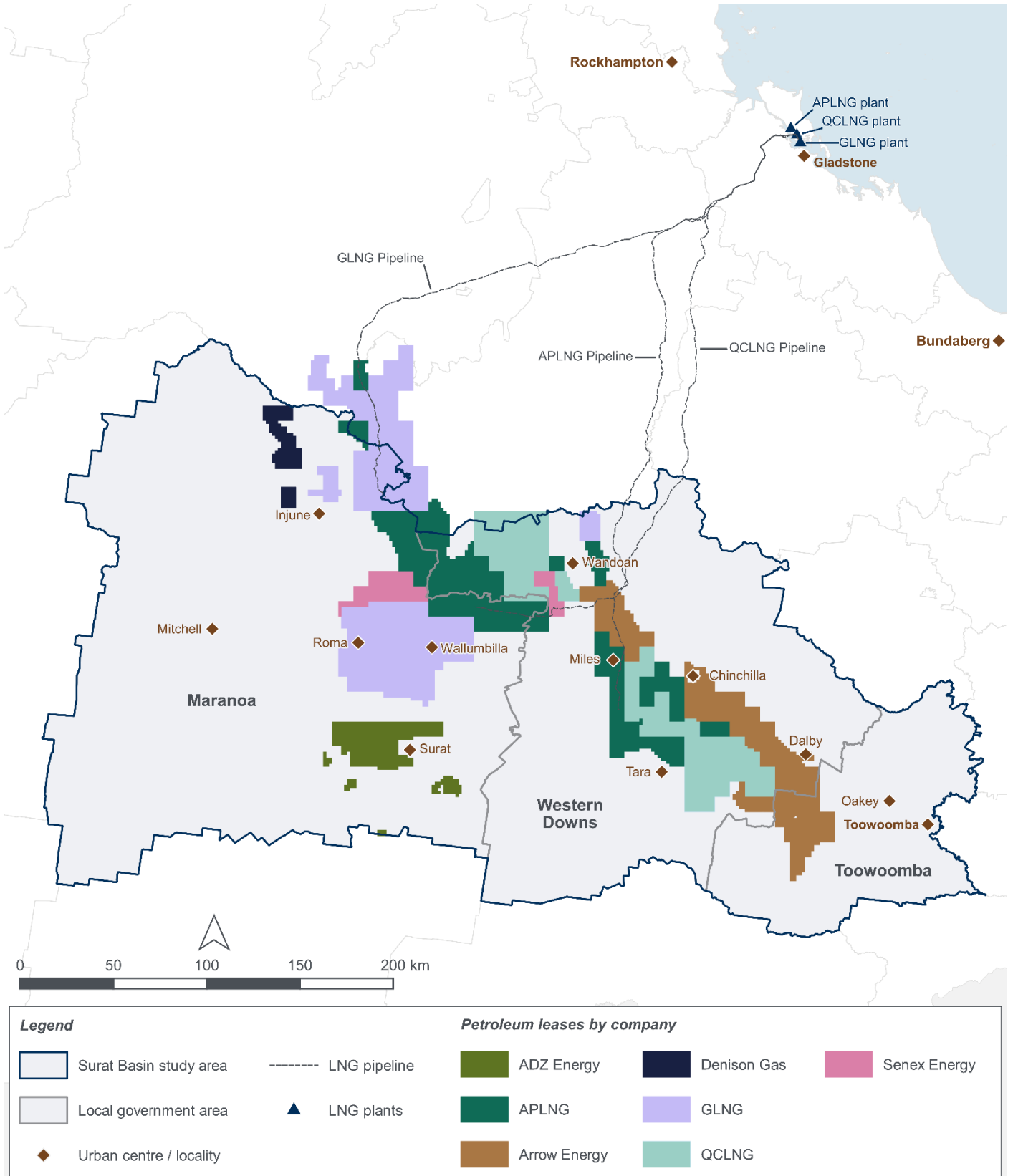
Figure 2 Non-resident population, Surat Basin LGAs, as at June



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 Petroleum leases by company^(a), Surat Basin



(a) Includes petroleum lease (PL) applications and PLs granted as at June 2025. Does not include PLs held by other companies.

Source: Queensland Government, 2025; QGSO, 2025

Full-time equivalent (FTE) population

In June 2025, the Surat Basin had an estimated FTE population of 240,450 persons, comprising 236,525 residents and 3,925 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 in June 2025 (187,640 persons), though the non-resident component comprised only 0.1% of the FTE. Non-resident workers on-shift accounted for 7% of Western Downs's FTE population of 38,095 persons and 8% of Maranoa's FTE population of 14,715 persons.

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 2025

LGA	Location ^(a)	UCL	Resident population ^(b)	Non-resident population	FTE population
			— persons —		
Maranoa	In town	Roma	6,865	185	7,050
		Other towns ^(c)	1,915	50	1,965
	Rural areas		4,730	975	5,705
Maranoa total			13,510	1,210	14,715
Toowoomba	In town	Millmerran	1,475	50	1,525
		Oakey	4,460	25	4,485
		Toowoomba	116,420	120	116,540
		Other towns ^(c)	38,980	20	39,005
	Rural areas		26,085	0	26,085
Toowoomba total			187,420	220	187,640
Western Downs	In town	Chinchilla	6,615	670	7,285
		Dalby	12,685	410	13,095
		Jandowae	805	50	855
		Miles	1,385	260	1,645
		Wandoan	485	145	630
		Other towns ^(c)	1,000	10	1,005
	Rural areas		12,625	955	13,585
Western Downs total			35,595	2,500	38,095
SURAT BASIN TOTAL			236,525	3,925	240,450

(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'.

Sources: QGSO, 2025

Non-resident population distribution

In June 2025, around half of the Surat Basin's non-resident population was counted in towns (1,995 persons or 51%), with the balance in rural areas (1,930 persons or 49%) (Table 2). The geographical distribution of the non-resident population varied across the three LGAs. In Maranoa, non-resident workers on-shift were predominantly counted in rural areas (975 persons or 81%), while in Western Downs, most stayed in town (1,540 persons or 62%). All non-resident workers on-shift in Toowoomba were counted in town (220 persons).

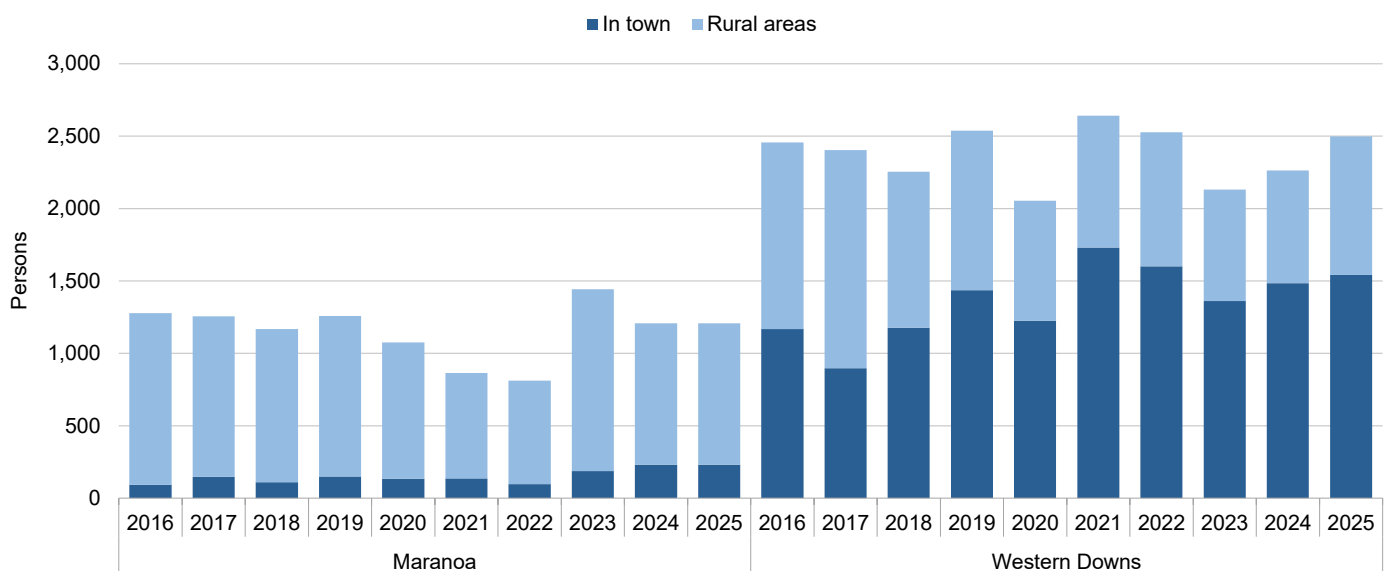
Several urban centres and localities (UCLs) in the Surat Basin housed non-resident workers on-shift in June 2025 (Table 2). Three UCLs in Western Downs had non-resident populations of 200 or more—Chinchilla (670 persons), Dalby (410 persons), and Miles (260 persons). In Maranoa, the UCL of Roma had the largest number of non-resident workers on-shift (185 persons).

Since the transition from CSG construction to production, non-resident population change and distribution in the LGAs of Maranoa and Western Downs have been shaped by different influences.

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. Since 2016, the majority of non-resident workers on-shift in Maranoa have stayed in rural areas due to the comparatively remote location of most gas industry activity in the LGA, with smaller numbers counted in town (Figure 4). This trend continued in June 2025, with the vast majority of workers staying in rural areas (975 persons).

In Western Downs, in addition to ongoing CSG activity, the non-resident population reflects a broader range of influences including renewable energy projects, coal mining and power station operations. The relative proximity of CSG operations and developments and other resource projects to population centres in Western Downs has enabled greater use of in town accommodation by non-resident workers. The number of non-resident workers on-shift in rural areas of Western Downs reached 955 persons in June 2025, due largely to increased numbers of CSG 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 around three-quarters of the non-resident workers on-shift in the region in June 2025 (2,845 persons or 72%) (Table 3). The balance of the non-resident population (1,085 persons or 28%) stayed in other accommodation such as hotels/motels and caravan parks.

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.

The number of non-resident workers on-shift in both WAVs and other accommodation in the region increased in 2024–25, up by 150 persons and 130 persons respectively.

At the LGA level, Maranoa recorded a slight change in accommodation usage by non-resident workers on-shift in 2024–25, with numbers in WAVs decreasing by 20 persons, offset by an increase of 20 persons in other accommodation. In Western Downs, the non-resident population increased in both WAVs (+170 persons) and other accommodation (+70 persons).

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

LGA	WAVs	Other ^(a)	Total	WAVs	Other ^(a)	Total
	2025			Change, 2024 to 2025		
	— persons —					
Maranoa	985	225	1,210	-20	20	0
Toowoomba ^(b)	0	220	220	0	45	45
Western Downs	1,860	640	2,500	170	70	235
SURAT BASIN TOTAL	2,845	1,085	3,925	150	130	280

(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 2024 or June 2025.

Source: QGSO estimates

Table 4 Existing resource operations and projects under construction^(a), Surat Basin, June 2025

Category	Operation / project name	Company name	LGA
CSG	APLNG Operations and Development	APLNG ^(b)	Maranoa, Western Downs
CSG	Arrow Energy Surat Operations	Arrow Energy	Toowoomba, Western Downs
CSG	Atlas	Senex Energy	Western Downs
RI	Braemar Power Station	Alinta Energy	Western Downs
RI	Braemar 2 Power Station	Arrow Energy	Western Downs
CM	Cameby Downs Mine	Yancoal Australia	Western Downs
CM	Commodore Mine	Millmerran Power Partners	Toowoomba
RI	Condamine Power Station	Shell Energy	Western Downs
RI	Darling Downs Power Station	Origin Energy	Western Downs
CSG	Denison South (Yellowbank)	Denison Gas	Maranoa
CSG	GLNG Operations and Development	GLNG ^(c)	Maranoa, Western Downs
CSG	Kincora Project	ADZ Energy	Maranoa
CM	Kogan Creek Mine	CS Energy	Western Downs
RI	Kogan Creek Power Station	CS Energy	Western Downs
RE	Kogan Energy Hub	CS Energy	Western Downs
RI	Millmerran Power Station	Genuity	Toowoomba
CM	New Acland Mine	New Hope Group	Toowoomba
RI	Oakey Power Station	Shell Energy	Toowoomba
CSG	QCLNG Operations and Development	QCLNG ^(d)	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	Ulinda Park BESS	Akaysha Energy	Western Downs
RE	Wambo Wind Farm	Cubico Sustainable Investments / Stanwell	Western Downs
RE	Wandoan South Solar Project, Stage 2	Vena Energy	Western Downs
RE	Western Downs Battery, Stage 2	Neoen	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 2025. Operations that have ceased production or were in care and maintenance 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 MidOcean Energy.

Source: QGSO 2025

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 2025 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 during the last week of June 2025. 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 2025.

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 2025 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 2025 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.

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.

Sources

Queensland Government (2025) *Queensland Spatial Catalogue*

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