

# Bowen Basin population report, 2023

## 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 Bowen Basin during the last week of June 2023. 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.

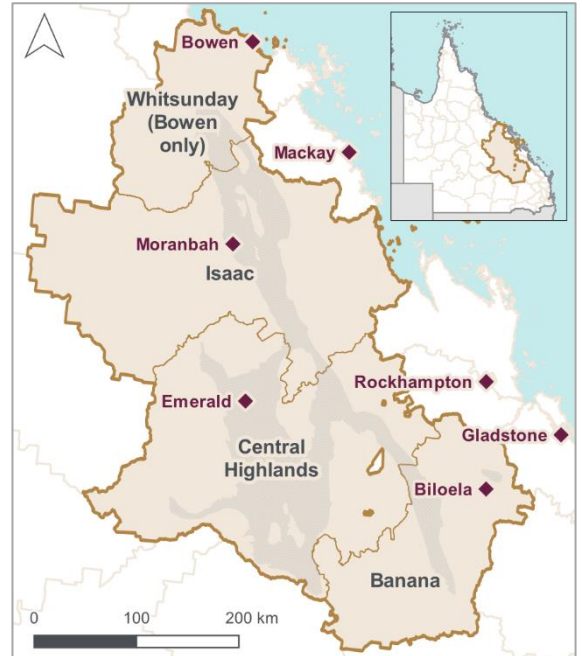
Estimates within this report are derived primarily from the annual Survey of Accommodation Providers conducted by the Queensland Government Statistician's Office (QGSO). The survey includes worker accommodation villages (WAVs), hotels, motels, and caravan parks.

## Key findings

Key findings of this report include:

- The Bowen Basin's non-resident population was estimated at 22,225 persons in June 2023, an increase of 1,685 persons or +8% from June 2022.
- In June 2023, the region's non-resident population reached its highest level since the resources boom of 2011 to 2013.
- Coal mining continued to account for the bulk of industry activity and employment in the region in June 2023. Coal project construction and gas industry operations and development also made a notable contribution to the total non-resident population.
- At the LGA level, Isaac had the largest non-resident population in the Bowen Basin in June 2023 (14,495 persons or 65% of the region's total). The remaining non-resident population was in Central Highlands (5,140 persons or 23%), Banana (1,845 persons or 8%) and Whitsunday (Bowen only) (745 persons or 3%).
- All four LGAs in the Bowen Basin recorded non-resident population growth in the year to June 2023. The largest increase occurred in Isaac (+1,090 persons), followed by Central Highlands (+365 persons), Banana (180 persons) and Whitsunday (Bowen only) (+55 persons).
- The Bowen Basin had an estimated FTE population of 102,695 persons in June 2023, comprising 80,470 residents and 22,225 non-resident workers on-shift.
- WAVs housed the majority of non-resident workers on-shift in the region in June 2023 (19,335 persons or 87% of the region's non-resident population). The remaining non-resident workers (2,895 persons or 13%) stayed in other accommodation such as hotels/motels and caravan parks.
- Bowen Basin's WAV capacity increased by 320 beds over the year to reach 29,850 beds in June 2023.
- The proportion of vacant and available hotel/motel rooms in the region fell to 21% in June 2023, from 29% a year earlier, driven by higher demand from the resources sector.

Figure 1 Bowen Basin region



### The Bowen Basin – at a glance

The Bowen Basin (Figure 1) is Queensland's most important source of export coal. The region comprises the local government areas (LGAs) of Banana, Central Highlands, Isaac and Whitsunday (Bowen only).

*Estimated population at June 2023:*

Non-resident population.....	22,225
Resident population.....	80,470
Full-time equivalent population.....	102,695

## Bowen Basin update, 2022–23

The Bowen Basin in Central Queensland (Figure 3) contains most of Australia's high quality metallurgical (coking and pulverised coal injection (PCI)) coal reserves, as well as significant deposits of thermal coal. As at June 2023, there were 48 coal mines in operation or under construction and two metalliferous mines located in the region, along with coal seam gas (CSG) and conventional gas operations, and other resource industry-related infrastructure (Table 6).

Saleable coal production from Bowen Basin coal mines in 2022–23 was 209.7 Mt, up from 204.5 Mt in 2021–22 (Queensland Government, 2023a). Many Bowen Basin coal producers reported strong production in the June quarter, supported by more favourable weather conditions than in previous quarters. The ramp-up of production at recently opened coal mines also contributed to this growth (Anglo American, 2023; BHP, 2023; Bowen Coking Coal, 2023; Bravus Mining and Resources, 2023; Coronado, 2023; Peabody Energy, 2023; Stanmore, 2023).

Along with stronger coal production, coal industry employment also grew over this period. The size of the Bowen Basin's coal industry workforce was around 42,900 persons in June 2023, an increase of around 5,900 persons or 16% from June 2022 (RSHQ, 2023). The majority of this growth was due to higher numbers at existing operations. Workers engaged at recently opened mines and workers involved in project construction also contributed to the increase.

A number of Bowen Basin coal mines reached notable milestones in 2022–23:

- **Newlands** coal mine near Glenden in the northern Bowen Basin came to the end of its mine life in February 2023 (Glencore, 2023). The mine has now moved to a rehabilitation and closure phase.
- Bowen Coking Coal's **Burton Complex** reopened in May 2023 (Queensland Government, 2023b). The complex includes the Broadmeadow East mine, which shipped first coal in January 2023, as well as several unmined coal deposits.
- **Ironbark No.1** achieved first coal in August 2022, just seven months after commencing construction in January 2022 (Fitzroy Mining Operations, 2023). First longwall coal production from the mine is projected to commence in late 2023.
- Construction at the **Olive Downs Complex** near Moranbah was advancing on multiple fronts in June 2023, including rail, electricity and coal infrastructure (Pembroke Resources, 2023). Mining at the complex began in early June 2023, with full operations due to commence in late 2023, and first coal expected to be exported in early 2024.
- Redevelopment of **North Goonyella** commenced in late 2022, with redevelopment efforts continuing to advance during the June quarter 2023 (Peabody Energy, 2023). Longwall production is expected to commence in 2026.

Construction work on stage one of the **Clarke Creek Wind and Solar Farm** in Isaac continued in 2022–23. At the end of June 2023, work at the site had just resumed following a full project management review and activities were expected to ramp up during July (Squadron Energy, 2023).

Operations and development works continued at **Santos GLNG's** Arcadia and Fairview gas fields in the southern Bowen Basin in 2022–23. In the June quarter, drilling and gas compression facility installation continued to progress as part of the Arcadia Valley Phase 2 project, while drilling and connections work advanced across the GLNG acreage (Santos, 2023).

Overall, coal mining continued to account for the bulk of industry activity and employment in the Bowen Basin in the year to June 2023, with most of these workers engaged in operational activities at existing and recently opened mines. Coal project construction and gas industry operations and development also made a notable contribution to the total workforce in some areas.

## Non-resident population

At the end of June 2023, the Bowen Basin's non-resident population was estimated at 22,225 persons, an increase of 1,685 persons or +8% from June 2022 (Table 1).

Almost two-thirds (65%) of non-resident workers on-shift in the region in June 2023 were counted in Isaac (14,495 persons), with the remainder recorded in Central Highlands (5,140 persons or 23%), Banana (1,845 persons or 8%), and Whitsunday (Bowen only) (745 persons or 3%).

All four LGAs in the Bowen Basin recorded non-resident population growth in the year to June 2023. The largest increase occurred in Isaac, where strong production at existing and recently opened mines and project construction contributed to an increase of 1,090 persons (or +8%). Central Highlands recorded a gain of 365 persons (or +8%), due to increased activity at existing mines and gas development. Banana grew by 180 persons

### 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.

(or +11%), driven mainly by expanded gas activity. In Whitsunday (Bowen only), the non-resident population rose by 55 persons (or +8%) between June 2022 and June 2023, reflecting activity at coal, rail and port operations.

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

LGA	2022	2023	Change, 2022 to 2023	
	— persons —		persons	%
Banana	1,670	1,845	180	11
Central Highlands	4,775	5,140	365	8
Isaac	13,405	14,495	1,090	8
Whitsunday (Bowen only)	690	745	55	8
<b>BOWEN BASIN TOTAL</b>	<b>20,540</b>	<b>22,225</b>	<b>1,685</b>	<b>8</b>

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

Source: QGSO estimates

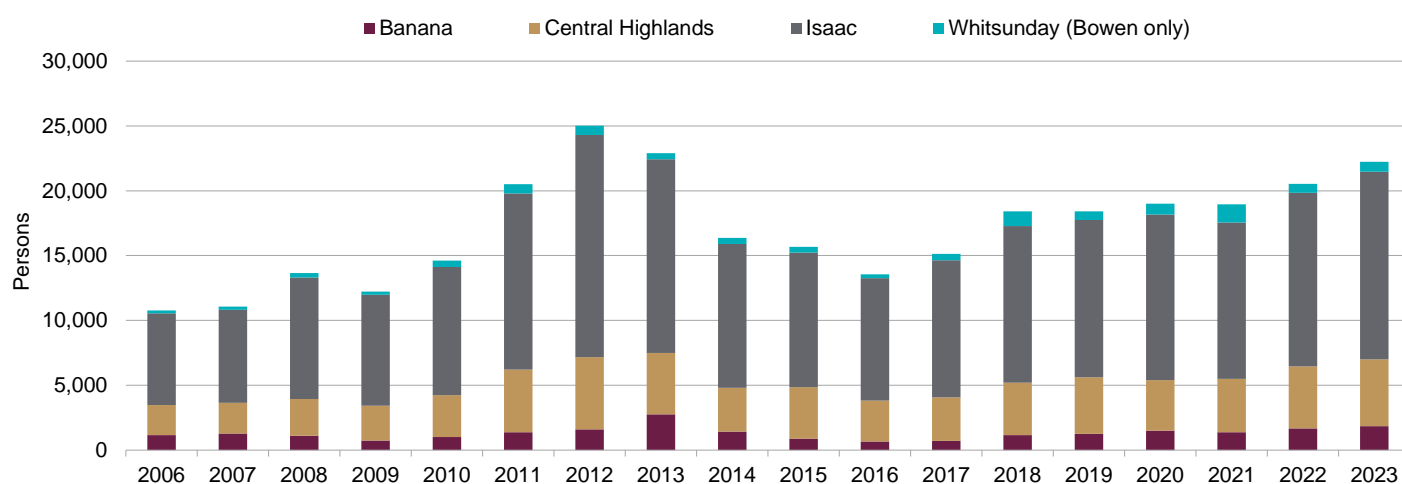
As Figure 2 shows, the Bowen Basin's non-resident population increased from 10,765 persons in 2006 to a peak of 25,035 persons in 2012. This growth was driven by the construction of major projects, including new coal mines, mine expansions, and infrastructure construction associated with major gas developments. The subsequent decline to 13,560 persons in 2016 reflects the transition to the production phase as large, temporary construction workforces were replaced by smaller operational workforces.

Increases in the region's non-resident population between 2016 and 2018 were associated with expanded coal production and projects to sustain ongoing operations rather than major project construction, as mining companies responded to high metallurgical and thermal coal prices. From 2018 to 2021, the Bowen Basin's non-resident population remained relatively stable (between 18,410 persons and 19,005 persons), with ongoing coal production being the main influence on numbers. A variety of other factors—including mine, rail and renewable energy project construction, gas development, and maintenance events—also contributed to the non-resident population in different years and in different LGAs.

In the last two years, the Bowen Basin's non-resident population has increased to its highest level since the resources boom of 2011 to 2013, reaching 20,540 persons in June 2022 and 22,225 persons in June 2023. In both years, workers engaged in operational activities at existing mines continued to comprise the bulk of the non-resident population, as occurred in the period from 2016 to 2021.

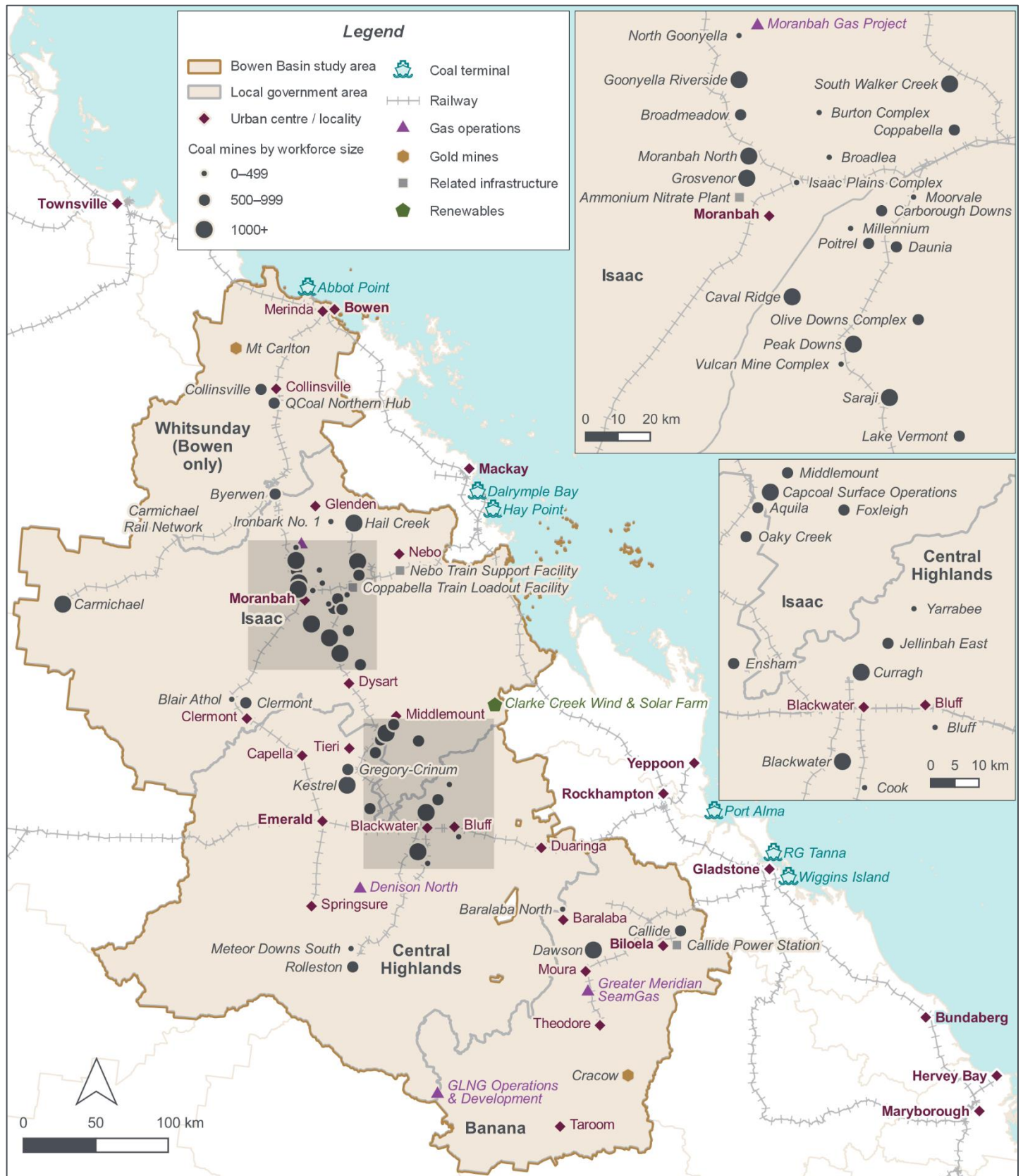
Non-resident population growth in the region in 2021–22 was due to a combination of factors, with construction and production activity at new and reopened mines, ongoing production and maintenance events at existing mines, expanded gas activity, and renewable energy project construction more than making up for a decline in large-scale project construction (QGSO, 2022). In 2022–23, the non-resident population was further boosted by the ramp-up of the workforce at recently opened mines, project construction (particularly at Olive Downs Complex), expanded gas activity, and higher worker numbers at some coal operations.

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



Source: QGSO estimates

**Figure 3 Existing resource operations and projects under construction<sup>(a)</sup>, Bowen Basin, June 2023**



(a) Coal mines by workforce size are based on numbers at June 2023 published by Resources Safety and Health Queensland (RSHQ), rather than confidential QGSO data. Operation and project locations shown in map are indicative only. See Table 6 (pages 9-10) for a full list of existing operations and projects by LGA.

Sources: RSHQ, 2023; QGSO, 2023

## Full-time equivalent (FTE) population

In June 2023, the Bowen Basin had an estimated FTE population of 102,695 persons, comprising 80,470 residents and 22,225 non-resident workers on-shift (Table 2). Non-resident workers on-shift made up almost one quarter (22%) of the region's total FTE population.

Isaac had the region's largest FTE population in June 2023 (37,315 persons), with 14,495 non-resident workers on-shift accounting for over one third (39%) of its FTE. The FTE population of Central Highlands was 33,700 persons with a smaller number and proportion of non-resident workers on-shift (5,140 persons or 15% of its FTE).

### 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, Bowen Basin LGAs and selected UCLs, June 2023**

LGA	Location <sup>(a)</sup>	UCL	Resident population <sup>(b)</sup>	Non-resident population	FTE population
			— persons —		
Banana	In town	Baralaba	270	155	425
		Biloela	5,740	365	6,105
		Moura	1,930	435	2,370
		Taroom	575	25	600
		Other towns <sup>(c)</sup>	710	20	730
	Rural areas		5,500	850	6,350
<b>Banana total</b>			<b>14,730</b>	<b>1,845</b>	<b>16,575</b>
Central Highlands	In town	Blackwater	4,710	1,915	6,625
		Bluff	235	260	495
		Capella	975	105	1,075
		Emerald	14,640	525	15,165
		Springsure	720	25	745
		Tieri	755	635	1,390
	Other towns <sup>(c)</sup>	1,335	15	1,355	
Rural areas		5,190	1,655	6,850	
<b>Central Highlands total</b>			<b>28,565</b>	<b>5,140</b>	<b>33,700</b>
Isaac	In town	Clermont	2,120	85	2,210
		Dysart	2,845	1,935	4,780
		Glenden	490	215	705
		Middlemount	1,900	1,545	3,445
		Moranbah	9,270	2,895	12,165
	Nebo	645	375	1,020	
Rural areas		5,540	7,450	12,990	
<b>Isaac total</b>			<b>22,820</b>	<b>14,495</b>	<b>37,315</b>
Whitsunday (Bowen only)	In town	Bowen	10,095	95	10,190
		Collinsville	1,340	490	1,835
		Other towns <sup>(c)</sup>	520	25	545
	Rural areas		2,405	130	2,540
<b>Whitsunday (Bowen only) total</b>			<b>14,360</b>	<b>745</b>	<b>15,105</b>
<b>BOWEN BASIN TOTAL</b>			<b>80,470</b>	<b>22,225</b>	<b>102,695</b>

(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

In June 2023, more than half of the Bowen Basin's non-resident population was counted in town (12,140 persons or 55%), with the balance in rural areas (10,085 persons or 45%) (Table 3). Four urban centres and localities (UCLs) had non-resident populations of 1,000 persons or more—Moranbah (2,895 persons), Dysart (1,935 persons), Blackwater (1,915 persons) and Middlemount (1,545 persons) (Table 2, page 5).

Growth in the Bowen Basin's non-resident population in 2022–23 was led by a notable increase of 1,410 persons in rural areas. The number of non-resident workers on-shift counted in town also grew by 275 persons.

All Bowen Basin LGAs recorded non-resident population growth in town and in rural areas in 2022–23. Rural areas in Isaac had the largest increase (+965 persons), driven by activity at existing and recently opened mines and project construction. The non-resident population in town in Isaac also grew (+130 persons), with particularly strong growth in Moranbah more than making up for a decline in Glenden. In Central Highlands, the number of non-resident workers on-shift in rural areas increased by 285 persons due to gas development and activity at existing mines, while growth in rural areas of Banana (+135 persons) was driven by expanded gas activity. In Whitsunday (Bowen only), non-resident population growth was more evenly distributed across in town (+30 persons) and rural areas (+25 persons).

**Table 3 Non-resident population distribution<sup>(a)</sup>, Bowen Basin LGAs, as at June**

LGA	In town	Rural areas	Total	In town	Rural areas	Total
	2023			Change, 2022–23		
	— persons —					
Banana	995	850	1,845	45	135	180
Central Highlands	3,480	1,655	5,140	75	285	365
Isaac	7,050	7,450	14,495	130	965	1,090
Whitsunday (Bowen only)	615	130	745	30	25	55
<b>BOWEN BASIN TOTAL</b>	<b>12,140</b>	<b>10,085</b>	<b>22,225</b>	<b>275</b>	<b>1,410</b>	<b>1,685</b>

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

Source: QGSO estimates

## Non-resident worker accommodation

Most non-resident workers on-shift in the Bowen Basin stayed in worker accommodation villages (WAVs), which housed 19,335 persons or 87% of the total in June 2023 (Table 4). Other types of accommodation, including hotels/motels and caravan parks, accounted for the remainder (2,895 persons or 13%). Across the region, WAVs are located both in rural areas and in town, while other establishments (hotels/motels and caravan parks) are mostly located in town.

### 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 the Bowen Basin accommodated in WAVs increased by 1,185 persons in the year to June 2023. The number of workers staying in other accommodation also grew (+505 persons) over this period.

At the LGA level, Isaac recorded the largest change in accommodation usage in 2022–23, with 800 more non-resident workers on-shift counted in WAVs and 290 more in other accommodation. Increased activity at existing and recently opened mines and project construction led to greater demand for WAV accommodation in the LGA, with overflow into other accommodation in some areas. In Central Highlands, the non-resident population in WAVs grew (+205 persons) due to increased activity at existing mines and gas development; numbers in other accommodation were also up (+155 persons) due to higher demand from mining, road and rail, and associated workers. Expanded WAV usage in Banana (+150 persons) was driven by expanded gas activity.

**Table 4 Non-resident population by accommodation type, Bowen Basin LGAs, as at June**

LGA	WAVs	Other <sup>(a)</sup>	Total	WAVs	Other <sup>(a)</sup>	Total
	2023			Change, 2022–23		
— persons —						
Banana	1,335	510	1,845	150	25	180
Central Highlands	4,385	750	5,140	205	155	365
Isaac	13,080	1,415	14,495	800	290	1,090
Whitsunday (Bowen only)	530	215	745	25	30	55
<b>BOWEN BASIN TOTAL</b>	<b>19,335</b>	<b>2,895</b>	<b>22,225</b>	<b>1,185</b>	<b>505</b>	<b>1,685</b>

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

Source: QGSO estimates

WAVs have been the predominant type of non-resident worker accommodation used in the Bowen Basin since the Survey of Accommodation Providers began in 2006, with much smaller numbers in other accommodation (Figure 4). Other accommodation types including hotels, motels or caravan parks often cater for additional workers requiring accommodation in periods of high demand. In June 2023, 13% of non-resident workers on-shift stayed in other accommodation.

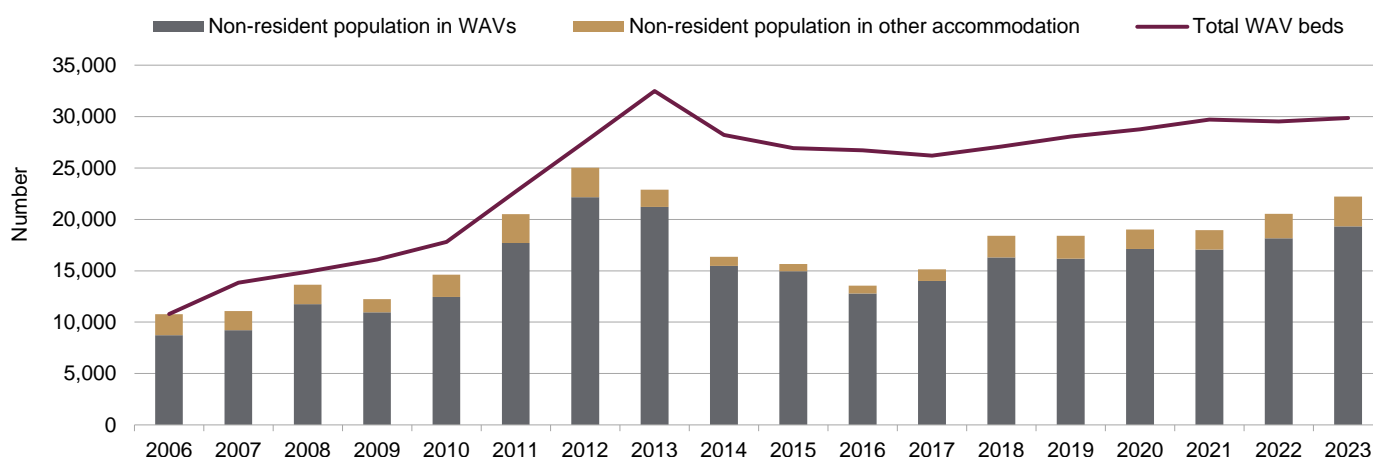
WAVs have several advantages over other types of accommodation for housing non-resident workers, including the flexibility to expand or contract capacity with changing workforce demand, economies of scale for large workforces, and the ability to house workers on or near work sites in rural areas. The number of WAV beds across the region varies from year to year as camps open, close (either temporarily or permanently), and change in size in response to demand from industry and the needs of specific projects.

As Figure 4 shows, the number of WAV beds in the region increased along with non-resident population growth over the period leading up to June 2012, and continued to increase in the year to June 2013 as the non-resident population fell. Rapid growth leading to the peak in 2013 was driven by new camps catering for the large, temporary construction workforces of major gas pipeline and coal projects. Moderate growth between 2017 and 2021 reflects a combination of influences, including additional bed capacity catering for workers at construction projects and coal operations.

Following a minor decline in 2021–22, WAV bed capacity increased by 320 beds in 2022–23 to reach 29,850 beds in June 2023. This small net gain was largely due to changes in capacity at existing camps, with additional beds at some WAVs more than making up for a reduction in capacity at other WAVs.

The noticeable difference between the number of WAV beds and number of non-resident workers on-shift in the region since 2013 does not necessarily indicate surplus bed availability, as many establishments reserve rooms for workers when they are rostered off.

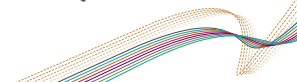
**Figure 4 Non-resident population by accommodation type<sup>(a)</sup> and WAV bed capacity, Bowen Basin, as at June**



(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



Queensland Government Statistician's Office

In relation to hotel/motel rooms in the Bowen Basin, around 21% were vacant and available in June 2023, down from the proportions in June 2022 (29%) and June 2021 (40%) (Table 5). Increased demand from the resources sector was the driving influence behind the decline in availability in 2022–23.

Three of the four LGAs in the Bowen Basin recorded reduced availability in June 2023 compared with the previous year. The proportion of vacant and available hotel/motel rooms in Isaac declined from 36% in June 2022 to 20% in June 2023, due to demand from workers engaged in coal mining and project construction. The vacant and available rate in Central Highlands was also 20% in June 2023, down from 30% a year earlier. This decrease was associated with stronger demand from resource industry workers and other guests. In Banana, the proportion of vacant and available hotel/motel rooms fell from 29% in June 2022 to 21% in June 2023, with higher demand from the resource sector including power station and road workers.

In contrast, the proportion of vacant and available hotel/motel rooms in Whitsunday (Bowen only) increased from 15% in June 2022 to 23% in June 2023.

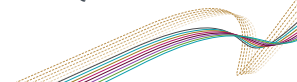
**Table 5 Vacant and available hotel/motel rooms, Bowen Basin LGAs, as at June**

LGA	Occupied by non-resident workers	Vacant and available <sup>(a)</sup>	Balance <sup>(a)</sup>	Total hotel/motel rooms <sup>(a)</sup>	Vacant and available hotel/motel rooms		
					2023		
					2021	2022	2023
					— % —		
Banana	250	115	180	545	47	29	21
Central Highlands	670	290	510	1,470	46	30	20
Isaac	515	170	150	835	39	36	20
Whitsunday (Bowen only)	215	135	240	590	20	15	23
<b>BOWEN BASIN TOTAL</b>	<b>1,650</b>	<b>710</b>	<b>1,080</b>	<b>3,440</b>	<b>40</b>	<b>29</b>	<b>21</b>

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

Source: QGSO estimates





Queensland Government Statistician's Office

**Table 6 Existing resource operations and projects under construction<sup>(a)</sup>, Bowen Basin, June 2023**

Category	Operation / project name	Company name	LGA
RI	Abbot Point Operations	Abbot Point Bulkcoal	Whitsunday (Bowen only)
CM	Aquila	Anglo American	Isaac
CM	Baralaba North	Baralaba Coal Company	Banana
CM	Blackwater	BHP	Central Highlands
CM	Blair Athol	TerraCom	Isaac
CM	Bluff	Bowen Coking Coal	Central Highlands
CM	Broadlea	Fitzroy Mining Operations	Isaac
CM	Broadmeadow	BHP	Isaac
CM	Burton Complex	Bowen Coking Coal	Isaac
CM	Byerwen	QCoal Group	Isaac
CM	Callide	Batchfire Resources	Banana
RI	Callide Power Station	CS Energy	Banana
CM	Capcoal Surface Operations	Anglo American	Isaac
CM	Carborough Downs	Fitzroy Mining Operations	Isaac
CM	Carmichael	Bravus Mining and Resources	Isaac
RI	Carmichael Rail Network	Bowen Rail Company	Isaac, Whitsunday (Bowen only)
CM	Caval Ridge	BHP	Isaac
RE	Clarke Creek Wind and Solar Farm	Squadron Energy	Isaac
CM	Clermont	Glencore Coal	Isaac
CM	Collinsville	Glencore Coal	Whitsunday (Bowen only)
CM	Cook	Constellation Mining	Central Highlands
CM	Coppabella	Peabody Energy	Isaac
RI	Coppabella Train Loadout Facility	Pacific National	Isaac
MM	Cracow Gold Mine	Aeris Resources	Banana
CM	Curragh	Coronado Coal	Central Highlands
CM	Daunia	BHP	Isaac
CM	Dawson	Anglo American	Banana
CSG	Denison North (Rolleston)	Denison Gas	Central Highlands
CM	Ensham	Ensham Resources	Central Highlands
CM	Foxleigh	Middlemount South	Isaac
CSG	GLNG Operations and Development	GLNG <sup>(b)</sup>	Banana, Central Highlands
CM	Goonyella Riverside	BHP	Isaac
CSG	Greater Meridian SeamGas	WestSide Corporation	Banana
CM	Gregory–Crinum	Sojitz Blue	Central Highlands
CM	Grosvenor	Anglo American	Isaac
CM	Hail Creek	Glencore Coal	Isaac
CM	Ironbark No. 1	Fitzroy Mining Operations	Isaac
CM	Isaac Plains Complex	Stanmore Resources	Isaac
CM	Jellinbah East	Jellinbah Group	Central Highlands
CM	Kestrel	Kestrel Coal Resources	Central Highlands
CM	Lake Vermont	Jellinbah Group	Isaac
CM	Meteor Downs South	Sojitz Blue	Central Highlands
CM	Middlemount	Middlemount Coal	Isaac
CM	Millennium	MetRes	Isaac
CM	Moorvale	Peabody Energy	Isaac
RI	Moranbah Ammonium Nitrate Plant	Incitec Pivot	Isaac
CSG	Moranbah Gas Project	Arrow Energy	Isaac
CM	Moranbah North	Anglo American	Isaac
MM	Mt Carlton gold mine <sup>(c)</sup>	Navarre Minerals	Whitsunday (Bowen only)
RI	Nebo Train Support Facility	Pacific National	Isaac



Category	Operation / project name	Company name	LGA
CM	North Goonyella	Peabody Energy	Isaac
CM	Oaky Creek	Glencore Coal	Central Highlands
CM	Olive Downs Complex	Pembroke Resources	Isaac
CM	Peak Downs	BHP	Isaac
CM	Poitrel	Stanmore Resources	Isaac
CM	QCoal Northern Hub	QCoal Group	Whitsunday (Bowen only)
CM	Rolleston	Glencore Coal	Central Highlands
CM	Saraji	BHP	Isaac
CM	South Walker Creek	Stanmore Resources	Isaac
CM	Vulcan Mine Complex	Vitrinite	Isaac
CM	Yarrabee	Yancoal Australia	Central Highlands

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

- (a) Includes coal mining operations, metalliferous mines, gas operations, resource industry related infrastructure, and projects under construction as at June 2023. Operations that have ceased production or were in care and maintenance, including Grasstree and Newlands in Isaac LGA, are not included in this list. Some mining operations extend beyond the boundary of one LGA. In these cases, the LGA refers to the primary location of worker accommodation for the mine.
- (b) Santos Gladstone LNG (GLNG) is a joint venture between Santos, PETRONAS, Total and KOGAS.
- (c) At the end of June 2023, Navarre Minerals had gone into voluntary administration, but Mt Carlton mine had not yet been placed into care and maintenance.

Source: QGSO 2023

## Notes

LGA – local government area UCL – urban centre and locality

Place names refer to local government areas unless otherwise specified.

Whitsunday (Bowen only) comprises the statistical areas level 2 (SA2s) of Bowen and Collinsville, which cover the area of former Bowen Shire.

Data in this report are derived from surveys conducted by QGSO in 2023 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 2023. 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 Bowen Basin as at June 2023.

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 2023 surveys, the number of non-resident workers on-shift in the Bowen Basin was unaffected by widespread adverse weather events or industrial action.

Resident population estimates for 2023 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 other guests, rooms that were not occupied but held for non-resident workers under permanent booking arrangements, or rooms unavailable for other reasons.

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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