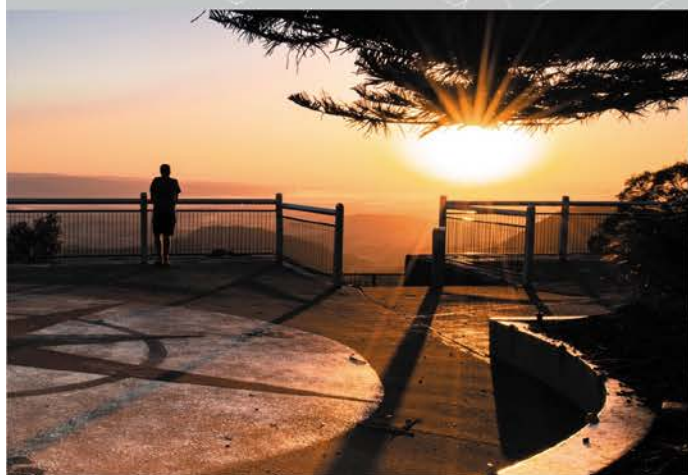


Annual Report: Wallumbilla

Social and economic changes in Queensland's
gasfield communities in 2017



Research Team

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Acknowledgements

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Disclosure/Disclaimer

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This report has not been peer reviewed.

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The Wallumbilla CSG Development Story

The 'Wallumbilla CSG Development Story' was developed in consultation with key members of the Wallumbilla community. These include representatives of: local businesses operators, community volunteers, long-term residents, regional police, and local government staff.

The individuals participating in this consultation were asked to discuss and comment on statistical data on indicators of social and economic impact. These discussions provided a local point of view and insight into the Wallumbilla CSG development story, to be used in combination with the publicly available data. The following indicators were discussed:

1. Population
2. Unemployment
3. Income & Business
4. Housing
5. Crime

Those interviewed said that Wallumbilla was a "close-knit", friendly town with a strong economic base in agricultural production (mainly beef). Once a "vibrant" community, Wallumbilla, like many small western towns, has experienced a decline in population and services over the last decade.

Data shows that Wallumbilla's resident population increased from 2001 to 2006, before experiencing a rapid decline until 2009. The town population rose from 2010 to 2012 as a result of an influx of non-resident workers (NRWs). Some families were reported to have moved to Wallumbilla from Roma to escape rising rents. In town, those interviewed stated that they noticed the influx of "fluoro shirts" as houses were bought by companies for worker accommodation. With the CSG construction period now over, many of these houses are now empty and for sale. Wallumbilla has experienced negative population growth since 2011/12; the town population is now less than the historic low of 2000/01. There are no NRWs living in town, as those remaining are located in camps out of town. In 2017, residents are starting to notice some new faces in town, reporting that some families from the surrounding region have relocated to Wallumbilla for a quieter lifestyle, or to send their children to the well-reputed P-10 State School.

CSG development appears to have created jobs for locals in the Roma Region. Although unemployment has historically been well below the Queensland average, it has consistently remained below 2% since 2010. Unskilled labour was difficult to source locally as were local tradespeople, say interviewees. For the proportion of elderly residents who rely on help with home maintenance, this lack of tradespeople is said to have caused some inconvenience. In 2017, the unemployment rate in the Roma Region is 2.2% – still well below the Queensland average of 6.1%. However, it should be noted that this regional data may not be fully representative of trends in Wallumbilla. For some members of the local community, unemployment is perceived to be an issue. The true unemployment rate is perceived to be higher than the data suggests, partly due to self-employed sub-contractors not being captured in the figures.

Local businesses were said to generally welcome the increase in business seen from 2010, in association with CSG industry development and more people in town. Prior to 2010/11, the number of non-primary production businesses in Wallumbilla did not exceed 25; their combined income fluctuated between \$170,000 - \$420,000 per year. By 2012/13, the number of businesses had increased to 46, and total business

income had grown by a factor of 18, from ~\$180,000 in 2009/10 to ~\$5.7 million by 2012/13. Average individual incomes increased steadily over this period; however, compared to other QLD gasfield towns, wage growth rate in Wallumbilla was not incongruous with the historic trend or the state benchmark. After a period of decline after the 2012/13 peak, average incomes have grown by 6.7%. Total business income has almost halved since the peak, however the most recent data (2015/16) showed signs of increasing again. Now in the CSG operation phase, the industry is not perceived to contribute significantly to local economies; one interviewee stated that “workers purchase coffee in town, but little else”. The recovery of beef prices since 2016 is reported to have been a boost to the local economy.

Interviewees suggested that housing impacts of CSG activity were not as pronounced in Wallumbilla as in Roma, and that housing has remained affordable. Historically, rental prices were very stable at about \$100 per week from 2001 to 2005. Prices began climbing at this time, with the highest prices recorded in 2012 and 2013 at \$260 per week. The included data shows the median rent for the broader Roma Region SA2, however interviewees reported that rents in Wallumbilla reached up to \$500 per week. Rents have since come down to \$180 in 2017; this has continued the post-boom decline since 2015, but is still 12.5% higher than pre-CSG rent values. The median house price in the Roma Region SA2 has been increasing steadily since 2003, with the fastest growth occurring between 2006 and 2010 (before CSG construction commenced in the region). This reached an all-time high of \$190,000 in 2016; however, in 2017 this growth has showed signs of slowing down and reversing, coinciding with a drop in demand (number of sales). A high number of properties that are vacant or for sale have been observed. Empty company-owned houses, in particular, are perceived as a problem.

Total crime in Wallumbilla has consistently stayed well below the Queensland benchmark, at less than half the state average. However, the town experienced a significant increase and greater fluctuations in total crime from 2011 to 2014, coinciding with CSG construction activity. During this period, offences in the “other offences” category (e.g. drug possession and traffic infringements) dominated Wallumbilla’s crime statistics. Traffic offences, in particular, spiked noticeably above the Queensland benchmark; in 2011, 2013 and 2014, these offences were around four times higher than the preceding seven years. A relative increase in “other theft” (excluding unlawful entry) and drug offences was also recorded from 2012 – 2014. Today, the overall crime rate in Wallumbilla has returned to low, pre-CSG levels. Residents continue to have a positive sense of security and community safety, despite having heightened awareness of drug presence in their community.

This booklet provides detail on the aspects of the Wallumbilla story based on the range of priority indicators that we tracked. We would like to thank members of the Wallumbilla community for their cooperation and the gift of their time. We hope that we have done justice to their contributions to this study.

The UQ ‘Cumulative Impacts’ Research Team, June 2018.

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Introduction

The University of Queensland commenced research into the social and economic impacts of coal seam gas (CSG) development in 2013. This research focused on the combined impacts of the multiple CSG developments in the Western Downs region of Queensland as an initial case study, and has now expanded to include other local government areas—Maranoa, Toowoomba, and Isaac. The research team uses publicly available statistical information regarding a number of key indicators that were selected in consultation with community members at the commencement of research. These statistics are combined with additional data gained through interviews with key community members, which provide insight into the factors that are influencing changes in the community. This information is gathered each year, and findings are reported for each town, sub-regions and the region as a whole. More information about the methodology is contained in Appendix D to this report. In this document we present the findings on the town of Wallumbilla.

The following acronyms are used throughout this report:

CSG	Coal seam gas
FTE	Full-time equivalent
LGA	Local Government Area
NRW	Non-resident worker
QLD	Queensland
SA2	Statistical Area Level 2
SA3	Statistical Area Level 3
SLA	Statistical Local Area
UCL	Urban Centre & Locality

General community insights

2017 summary

The interviewees in Wallumbilla conveyed a general sense of looking ahead. They spoke of upcoming CSG activity in the area, such as the expansion of Santos' Scotia field and compression plant. In terms of economic development, there seems to be cautious optimism that Wallumbilla may benefit from this upcoming activity.

Community spirit:

- No insights about community spirit were gleaned from recent interviews.

Changed capability:

- Some interviewees conveyed a sense that there have been some positive changes to local capabilities since CSG activity began. "Without this, the area would have continued the slow decline seen in other rural towns.
- However, some people suggested that this positive impact could have been greater: "It is frustrating to have 400 people working 15km away and see so few economic benefits flow through the community."

Lessons learned:

- Expect proportionally greater impacts on smaller communities – Any changes in population can be "amplified" in smaller towns. "A few extra people, or houses for sale, they wouldn't even notice in the city, or even Roma. But here, the changes are amplified. If one new family moves in, and they're troublemakers, it makes a difference to everyone".
- Some interviewees recommended better forecasting and communication of expected numbers of NRWs (including sub-contractors), and planning earlier for accommodation arrangements (e.g. "build camps earlier").
- In small towns with only one police officer, increased presence in one area (such as highway traffic) means less in another (such as drugs enforcement); "he can't be everywhere at once". One interviewee recommended having more specialised highway police so local police can remain focused on the community.

1. Population

2017 summary

Wallumbilla has experienced negative population growth since 2011/12. In 2015/16 (data unavailable for 2016/17), non-resident workers (NRWs) in Wallumbilla had declined to zero and the resident population had dropped to 23% less than the historical level of 2000/01. Residents are starting to notice some new faces in town, reporting that some families from the surrounding region have relocated to Wallumbilla for a quieter lifestyle, or to send their children to the well-reputed P-10 State School.

Trends reflected in the data

Historical trend: Wallumbilla is a small, “close-knit” agricultural town with many older residents. The population of the town increased steadily from 2000/01 to 2005/06, at an average rate of 3% per annum. It then experienced year-on-year decline until 2009/10, corresponding with the year CSG activity was noticed locally.

During CSG construction period (2011 – 2014): The town’s full-time equivalent (FTE) population—which includes residents and non-resident workers (NRWs)—was boosted in 2009/10 and 2010/11 with the arrival of NRWs. At this time, NRWs numbered 1 for every 9 Wallumbilla residents. The resident population also saw a slight increase (2.2%) over this two-year period. Compared to the overall Maranoa Region trend, Wallumbilla’s population boost was short-lived; by 2011/12, both NRWs and resident population was in decline (several years before the major CSG construction period ended in the region).

Since CSG construction period (2015 – 2017): The downwards trend in population has continued. In 2015/16 (data unavailable for 2016/17), NRWs in Wallumbilla had declined to zero and the resident population had dropped to 23% less than the historical level of 2000/01.

Community insights and perceptions

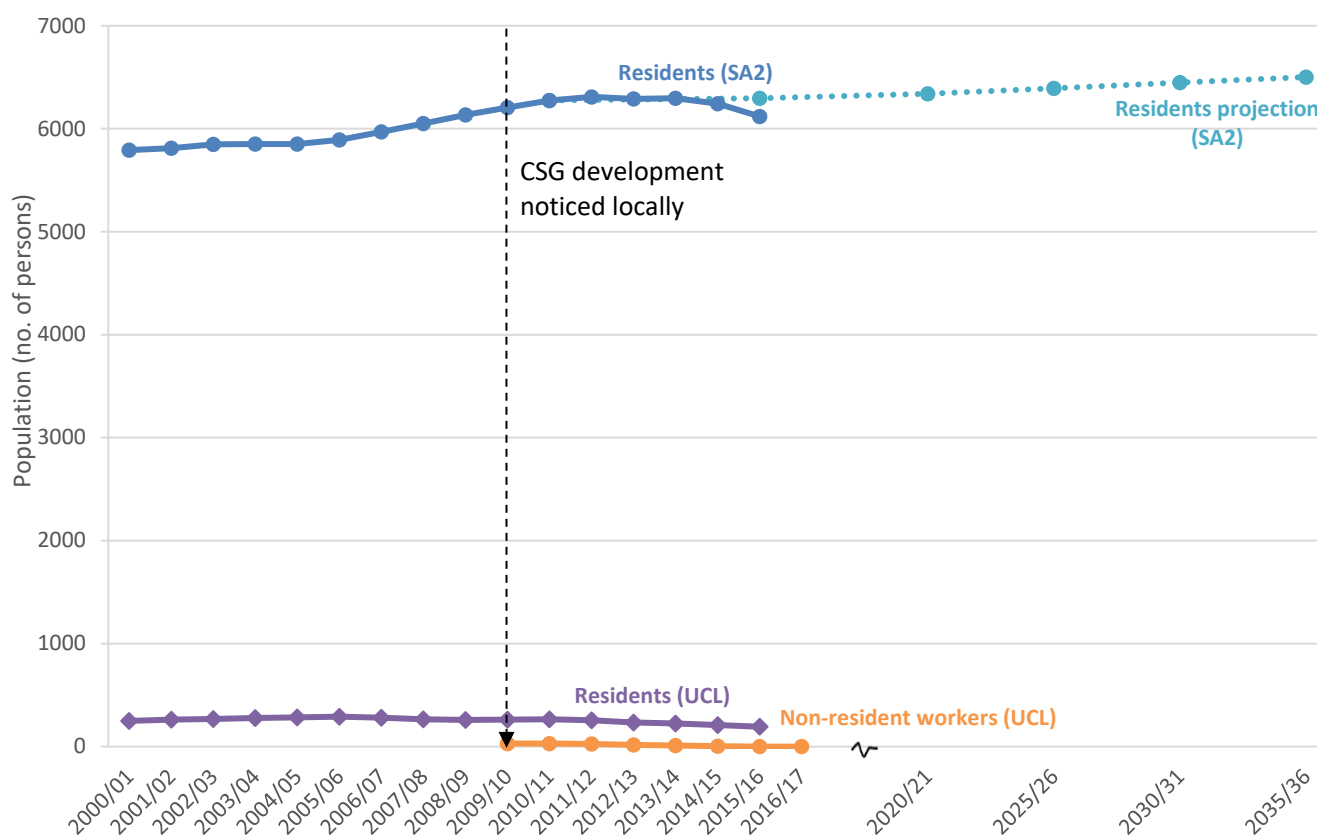
During CSG construction period (2011 – 2014): Those interviewed perceived that there were more NRWs in town than shown on the charts; “there were a lot of fluoro shirts”. The influx of NRWs was experienced as sudden, as “camps popped up overnight”. It was reported that some new residents chose to live in Wallumbilla because it is cheaper, but work in Roma. “It’s lost its country town feel - now it’s just like a suburb of Roma”. Women were reported to have felt vulnerable due to most men working away from the township during the day. One interviewee explained: “Women run everything here - the store, post office, pub, visitor centre, school. If there was a bushfire or ‘lock-down’, we do feel a bit vulnerable”.

Since CSG construction period (2015 – now): Those interviewed are starting to notice some new faces in town. These new residents are said to be mostly local to the Maranoa region, and are relocating to Wallumbilla, for example, to seek a quieter lifestyle or to send their children to a better school (Wallumbilla P-10 State School has good reputation).

Future expectations: Opinions vary – “I think population will keep going down gradually, as young people aren’t staying”; “It will probably increase; there are plenty of empty houses, and we have a good school”. The community is engaging with Origin in an attempt to have long term employees from Reedy Creek facility integrated into the community (following a similar strategy in Miles).

1. Population

1a. Wallumbilla population and projections

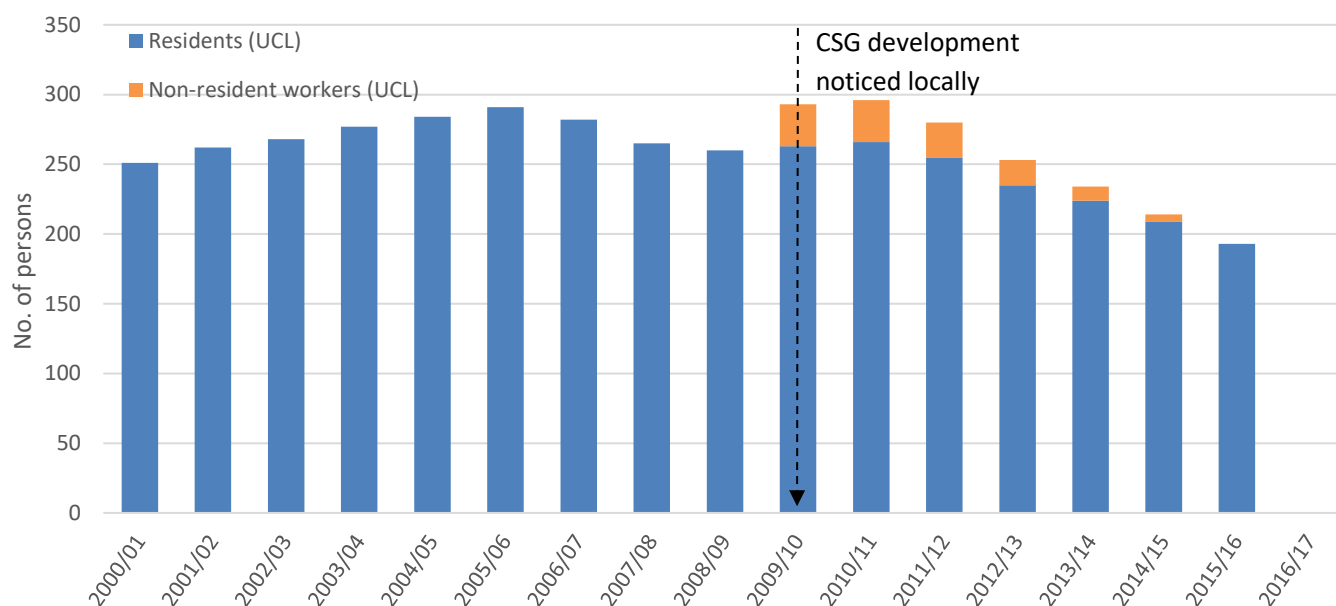


Data notes

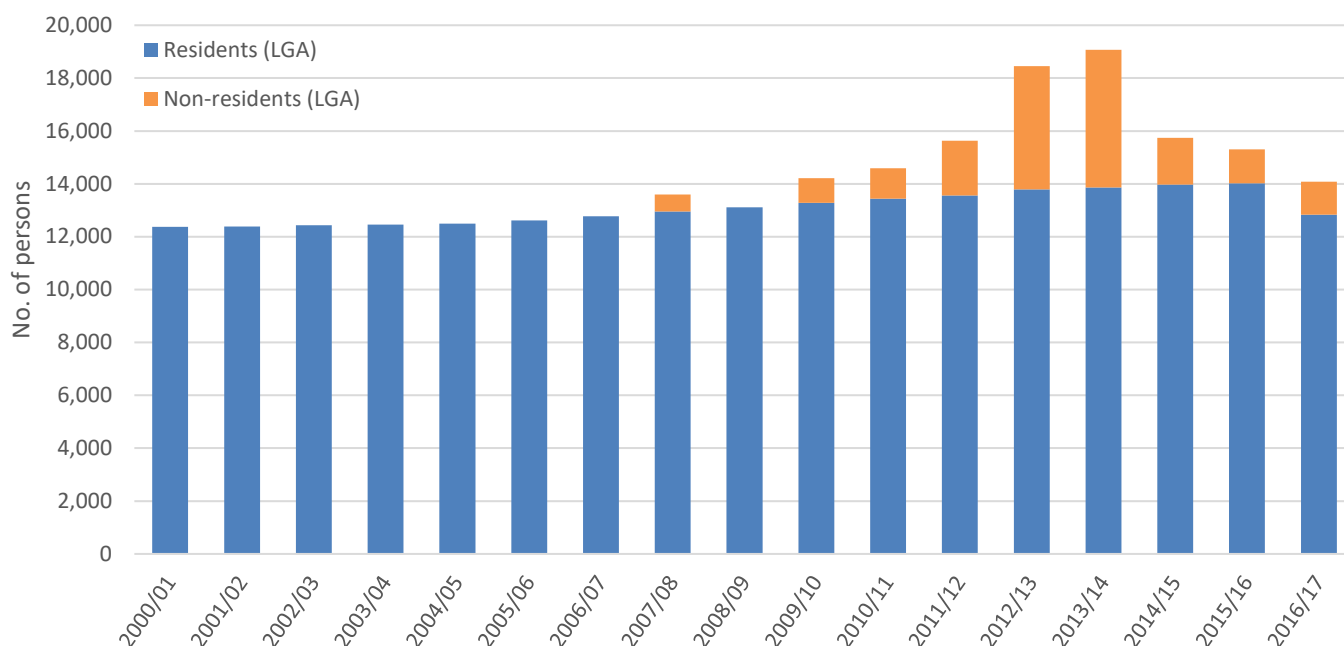
- UCL non-resident workers population estimate from QGSO 'Surat Basin Population Report' (ASGC 2016); 2017 version available here: <http://www.qgso.qld.gov.au/products/reports/surat-basin-pop-report/surat-basin-pop-report-2017.pdf>
- UCL resident population estimate from the QGSO table 'Estimated resident population (a) by urban centre and locality (b), Queensland, 2006 to 2016pr' (ASGS 2016), <http://www.qgso.qld.gov.au/products/tables/erp-ucl-qld/index.php>
- SA2 (Roma Region) population estimate from the QGSO table 'Estimated resident population by statistical area level 2 (SA2), Queensland, 2006 to 2016pr' (ASGS 2016), <http://www.qgso.qld.gov.au/subjects/demography/population-estimates/tables/erp-sa2-qld/index.php>
- Population projection (2015 edition) from QGSO table 'Projected population (medium series), by statistical area level 2 (SA2), SA3 and SA4, Queensland, 2011 to 2036' (ASGC 2001), <http://www.qgso.qld.gov.au/subjects/demography/population-projections/tables/proj-pop-medium-series-sa2-sa3-sa4-qld/index.php>
- At the time of publishing, UCL resident population data was unavailable for 2016/17
- NRW estimates do not include the many NRWs in camps outside town

1. Population

1b. Resident vs. non-resident population - Wallumbilla



1c. Resident vs. non-resident population - Maranoa Region



Data notes

- Source: Population and non-resident worker population estimates for Wallumbilla UCL and Maranoa LGA from the QGSO 'Surat Basin Population Report' (ASGC 2016); 2017 version available here: <http://www.qgso.qld.gov.au/products/reports/surat-basin-pop-report/surat-basin-pop-report-2017.pdf>
- Data missing for 2008/09 non-resident worker population, and Wallumbilla 2016/17 resident population

2. Employment

2017 summary

In 2017, the unemployment rate in the Roma Region is 2.2% – well below the Queensland average of 6.1%. However, it should be noted that this regional data may not be fully representative of trends in Wallumbilla. For some members of the local community, unemployment is perceived to be an issue. The true unemployment rate is perceived to be higher than the data suggests, partly due to self-employed sub-contractors not being captured in the figures.

Context

- Unemployment data is based on Statistical Area Level 2 (SA2) boundaries. Wallumbilla is captured in the Roma Region SA2, accounting for approximately 3% of the area's total population; this means unemployment data may not be fully representative of real trends in the township.

Trends reflected in the data

Historical trend: Unemployment in the Roma Region has historically stayed below 4% (considered “full employment”), placing it well below the Queensland average. The data shows a peak unemployment rate of 3.8% in 2006; this has not been exceeded since.

During CSG construction period (2011 – 2014):

From an already low baseline of 2% in 2010, unemployment in the Roma Region steadily declined to a low of 0.9% by 2013.

Since CSG construction period (2015 – 2017):

In 2014, unemployment began to return to a level more consistent with the historic trend. In 2017, the unemployment rate in the Roma Region is 2.2% – well below the Queensland average of 6.1%.

Community insights and perceptions

During CSG construction period (2011 – 2014):

Interviewees remarked how “all the men” were away at work during the day. Almost all local businesses were reportedly being run by women. Interviewees noted that many people living in Wallumbilla would drive to Roma for work. Local employers found it hard to get reliable unskilled staff; shortages were reported in unskilled labour, for example to help elderly residents with jobs, shelf fillers, and cleaners.

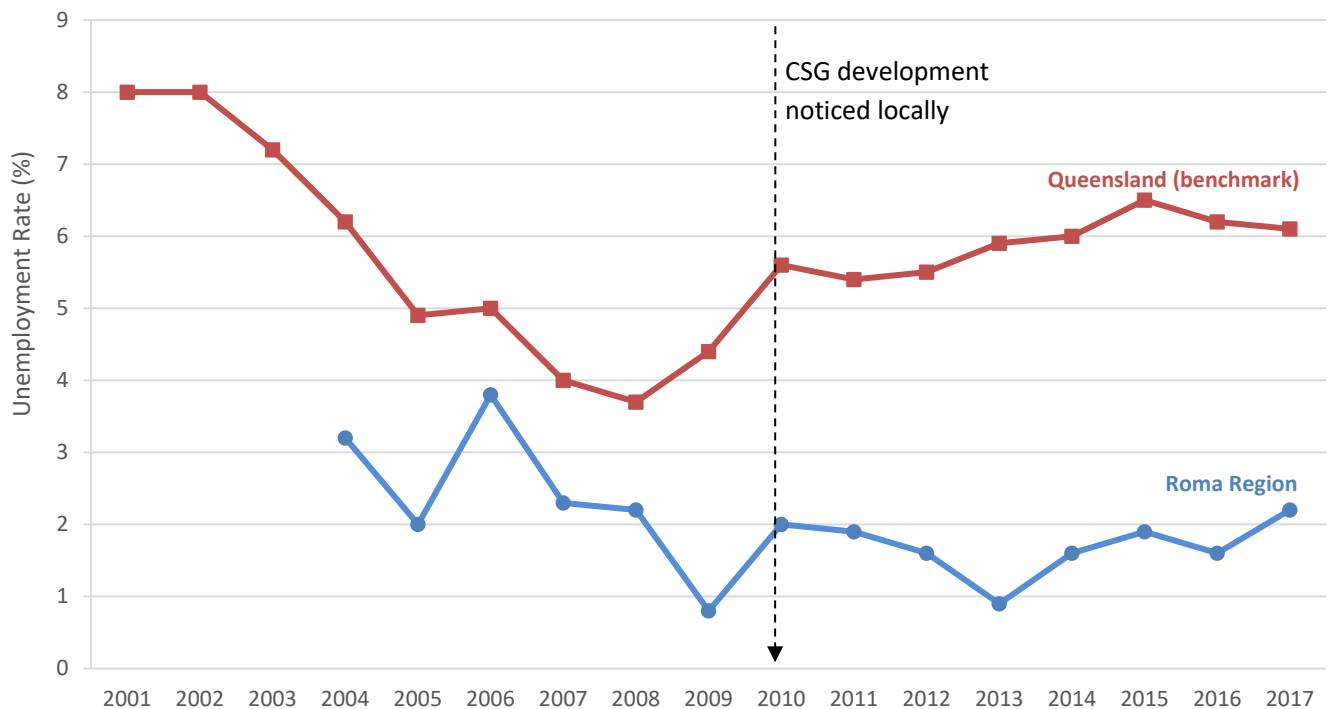
Since CSG construction period (2015 – now):

Unemployment is perceived to be an issue for Wallumbilla. One interviewee explained that many people who are without work are self-employed (e.g. sub-contractors); these individuals do not access Newstart payments, and are not likely to be captured in government unemployment statistics. Some residents are noticing more unemployed people moving in to take advantage of the low rental prices and high number of empty houses.

Future expectations: Those interviewed expect unemployment to continue rising as jobs in the resource sector are lost. Some suggested that people might pick up jobs in agriculture with a good season and high cattle prices.

2. Employment

2a. Unemployment rate



Data notes

- 2001-2008 based on SLA statistical boundary; Source: QGSO Regional Database Archived dataset 'Labour Force - Small Area (Qtr Ended 31 Dec 2002 to Qtr Ended 31 Dec 2008) [DEEWR, Small Area Labour Markets Australia] (ASGC 2001)', <http://www.qgso.qld.gov.au/products/tables/qld-regional-database/index.php>
- 2009-2010 data from DEEWR file 'Unemployment salm_data_files_2008-2013'
- 2010-2017 based on SA2 (Roma Region) statistical boundary; Source: QGSO Regional Database dataset 'Labour Force - Small Area (Qtr Ended 31 Dec 2010 to Qtr Ended 31 Dec 2017) [Department of Jobs and Small Business] (ASGS 2016)', <http://www.qgso.qld.gov.au/products/tables/qld-regional-database/index.php>
- Prior to 2017, unemployment data is reported for financial years; e.g. FY2016 corresponds to July 2015 to June 2016

3. Income & business

2017 summary

The number of non-primary production businesses has remained stable for the last four years at ~47. Total business income has almost halved since the 2012/13 peak, however the most recent data (2015/16) showed signs of increasing. After a period of decline after the peak, average incomes have grown by 6.7%. The recovery of beef prices since 2016 is reported to have been a boost to the local economy.

Context

- Business and individual income lag a year behind other data due to ATO data reporting cycles.

Trends reflected in the data

Historical trend: The wealth of the district has historically been dependent on agriculture, and incomes can reflect seasonal variation. Average personal income typically sat below the QLD average, and grew at a similar rate. Prior to 2010/11, the number of non-primary production businesses in Wallumbilla did not exceed 25; their combined income fluctuated between \$170,000 - \$420,000 per year.

During CSG construction period (2011 – 2014): The number of businesses doubled to 40 at the beginning of the CSG construction phase in 2010/11; this increased further to 46 in 2012/13. Total business income increased by a factor of 18 in three years, from ~\$180,000 in 2009/10 to ~\$5.7 million by 2012/13; in 2013/14, this began a steep decline. Average individual incomes increased steadily over this period; however, compared to other QLD gasfield towns, the wage growth rate in Wallumbilla was not incongruous with the historic trend or the state benchmark.

Since CSG construction period (2015 – 2017): The number of business has remained stable at ~47. However, the most recent data (2015/16) shows that total business income has almost halved since the 2012/13 peak. Average individual income also saw a period of decline (~\$3,000 per annum) after the peak, departing from the QLD growth trend. However, in 2015/16 this showed signs of increasing.

Community insights and perceptions

During CSG construction period (2011 – 2014): A visible increase in individual wealth was reported by some; “at school pickup, we saw people driving big new cars”. Some people on lower incomes are reported to have moved to Wallumbilla from Roma, where the cost of living was higher. New businesses established in town. The local store was reported to have broadened its product range to include ‘luxury’ items. Interviewees believe that some people and businesses in town prospered, as evidenced by the individual and business income data. For many others, life is said to have gone on as usual; “it [CSG] wasn’t really a big deal”. The cost of living in Wallumbilla reportedly increased during this period.

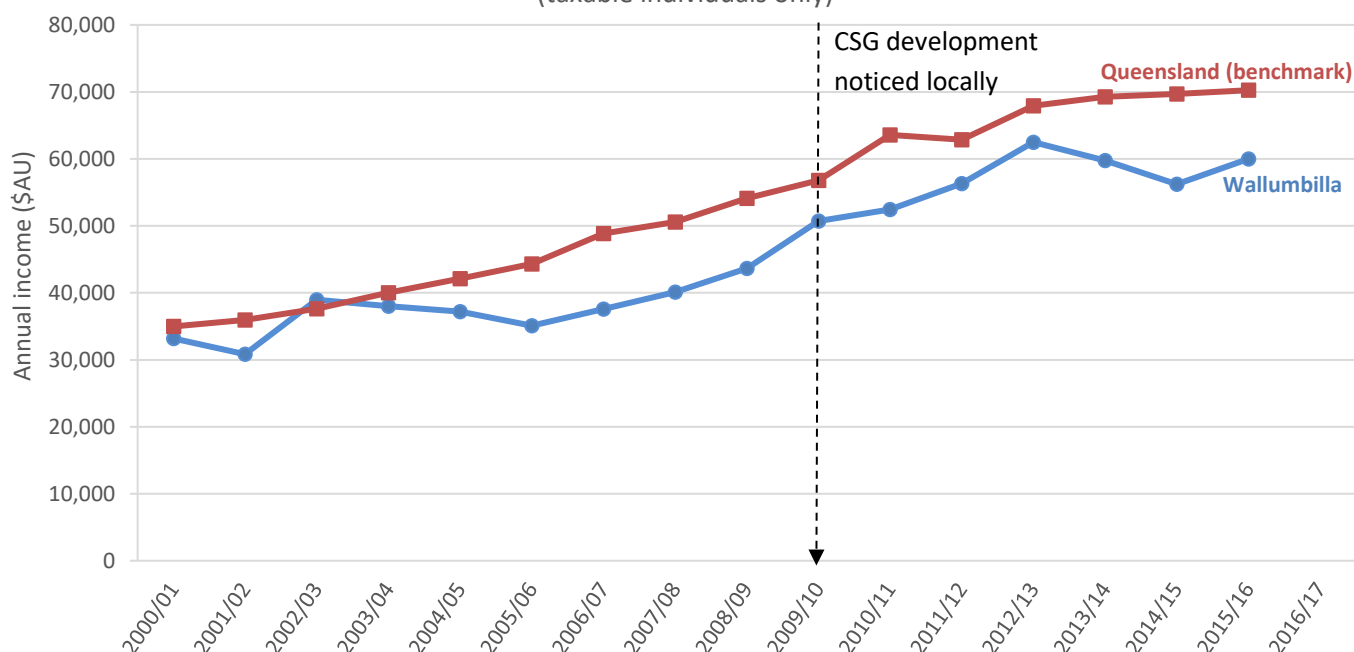
Since CSG construction period (2015 – now): The cost of living has reportedly stayed high; people who became accustomed to high “boom time” wages are now unwilling to work for lower wages. Business numbers and incomes are perceived to have declined; this might suggest that the sustained high number of businesses captured in the data are not visible (e.g. home businesses). Now in the CSG operation phase, the industry is not seen to contribute significantly to local economies; one interviewee stated that “workers purchase coffee in town, but little else”. The recovery of beef prices since 2016 has been positive for the local economy.

Future expectations: Those interviewed expect that average wages will decrease further, with fewer people earning high wages. Wallumbilla interviewees still notice CSG activity and say, “it’s not all over”.

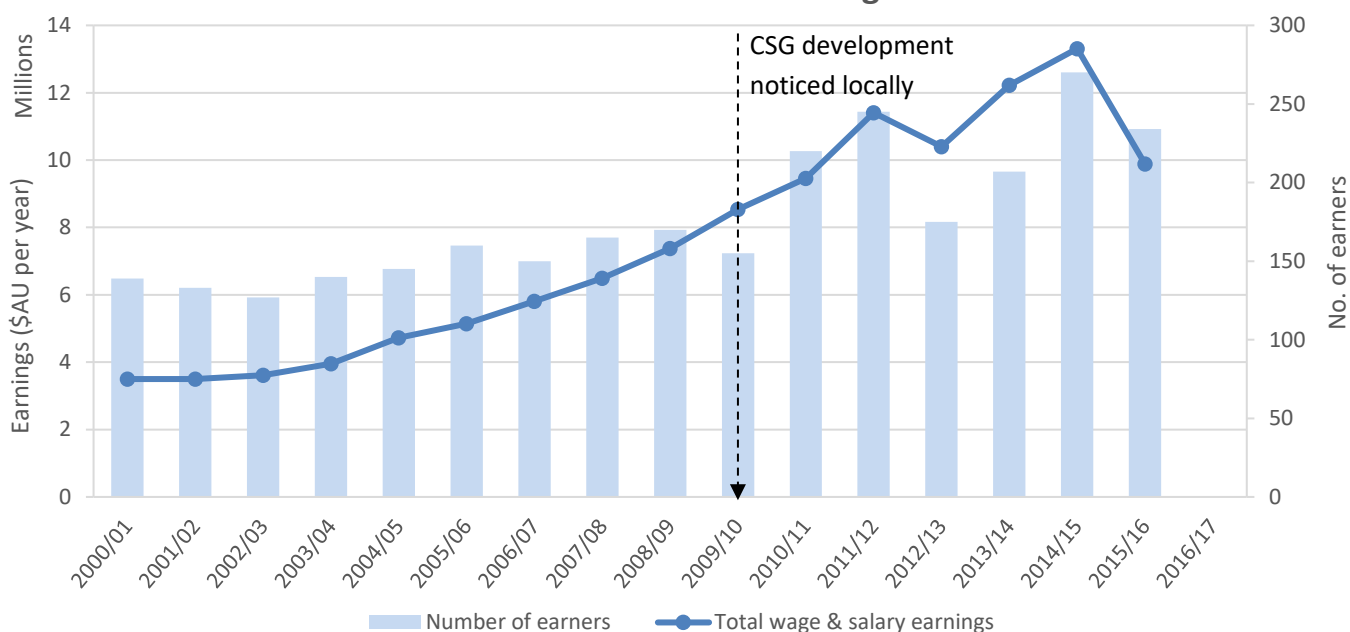
3. Income & business

3a. Average taxable income

(taxable individuals only)



3b. Total individual earnings

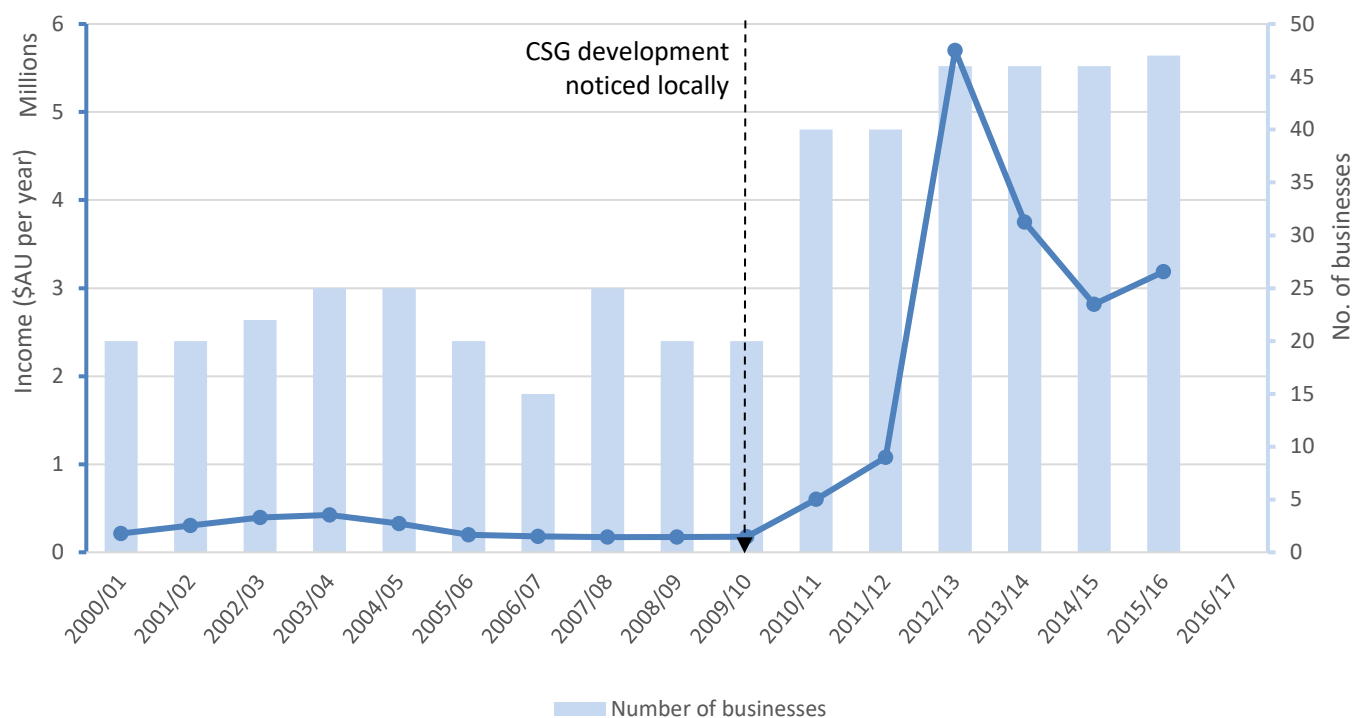


Data notes

- Source: Australian Taxation Office (ATO), Research and Statistics, <https://www.ato.gov.au/>
- Average taxable incomes reported by ATO until 2009 excluded losses. Averages from 2010 include all taxable incomes including incomes of zero and losses.
- Data relates to Wallumbilla postcode 4428
- Original data – no discounting applied
- Due to ATO data publishing cycles, 2016/17 data will be included in the 2018 Wallumbilla booklet

3. Income & business

3c. Total business income (non-primary production)



Data notes

- Source: Australian Taxation Office, Research and Statistics, <https://www.ato.gov.au/>
- Data relates to Wallumbilla postcode 4428
- Original data – no discounting applied
- Due to ATO data publishing cycles, 2016/17 data will be included in the 2018 Wallumbilla booklet

4. Housing

2017 summary

In 2017, the median rent in the Roma Region SA2 has continued a downwards trend; however, they remain 12.5% higher than pre-CSG values. House prices have declined from the historic high in 2015/16, but are higher than any year preceding 2013/14. It should be noted that this regional data may not be fully representative of trends in Wallumbilla. Some local residents suggest that, although housing impacts were not as pronounced in Wallumbilla as in Roma, “property got hit worst by the bust”.

Context

- Housing data is based on Statistical Area Level 2 (SA2) boundaries. Wallumbilla is captured in the Roma Region SA2, accounting for approximately 3% of the area’s total population; this means housing data may not be fully representative of real trends in the township.

Trends reflected in the data

Historical trend: Housing costs in the Roma Region have always been well below Brisbane and QLD averages. Relative to these benchmarks, both rental and sale values were slow growing between 2001 and 2005. From 2005 to 2008, the number of house sales boomed around 120. Consequently, house prices and rents increased strongly from 2006 to 2010, at 34.4% and 8.3% per annum, respectively.

During CSG construction period (2011 – 2014): Overall, house prices in the Roma Region SA2 continued to increase over this period, however at a much slower rate (3.9% per annum) than the preceding four years. The number of house sales reached a historic low of 47 in 2010/11; demand increased until 2012/13, then dropped off towards the end of the CSG construction period. Rent values saw a more dramatic change; they initially increased by 62.5% in the first two years (to a high of \$260 per week), before seeing a small decline in 2014.

Since CSG construction period (2015 – 2017): In 2017, the median rent for a 3-bedroom house was \$180. This has continued a steady decline since 2015, but is still 12.5% higher than pre-CSG rent values. Median house values in the Roma Region SA2 reached an all-time high of \$190,000 in 2015/16; this growth has since showed signs of slowing down and reversing. The number of house sales has continued to drop, reaching a new historic low of 22 in 2017.

Community insights and perceptions

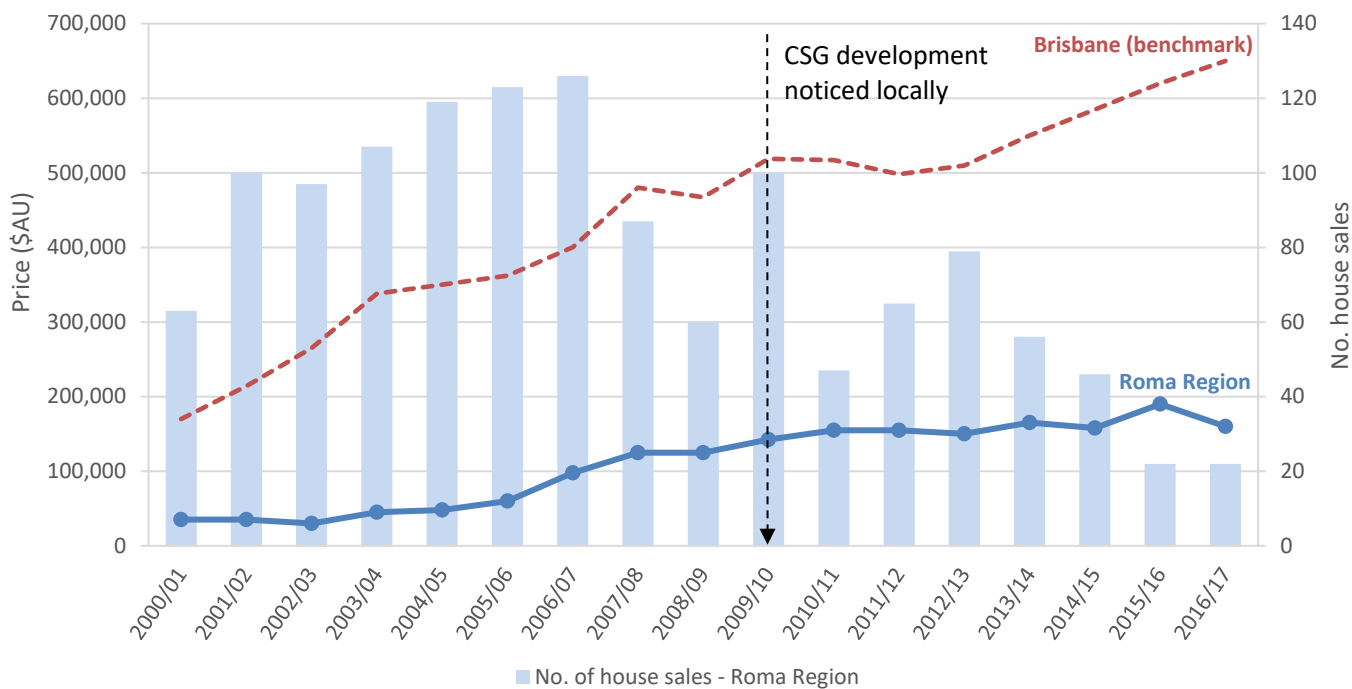
During CSG construction period (2011 – 2014): Workers were initially housed in town before the camps were built. The camps took the pressure off local housing. “Rents went up, but compared to Roma it’s still cheap”. Companies bought or rented houses for worker accommodation; and interviewees observed new housing being developed “to target the CSG boom”. Those individuals who owned houses and were able to rent them “did very well”.

Since CSG construction period (2015 – now): A high number of properties that are vacant or for sale have been observed. Empty company-owned houses, in particular, are perceived as a problem. House prices are reportedly depressed and have not yet shown signs of recovery. Some interviewees suggested that housing impacts were not as pronounced in Wallumbilla as in Roma; notwithstanding, “property got hit worst by the bust”.

Future expectations: One interviewee observed that in the last six months, some of the empty properties in Wallumbilla have been starting to secure tenants. People are holding out to sell property until prices return to normal, but are uncertain when that will be.

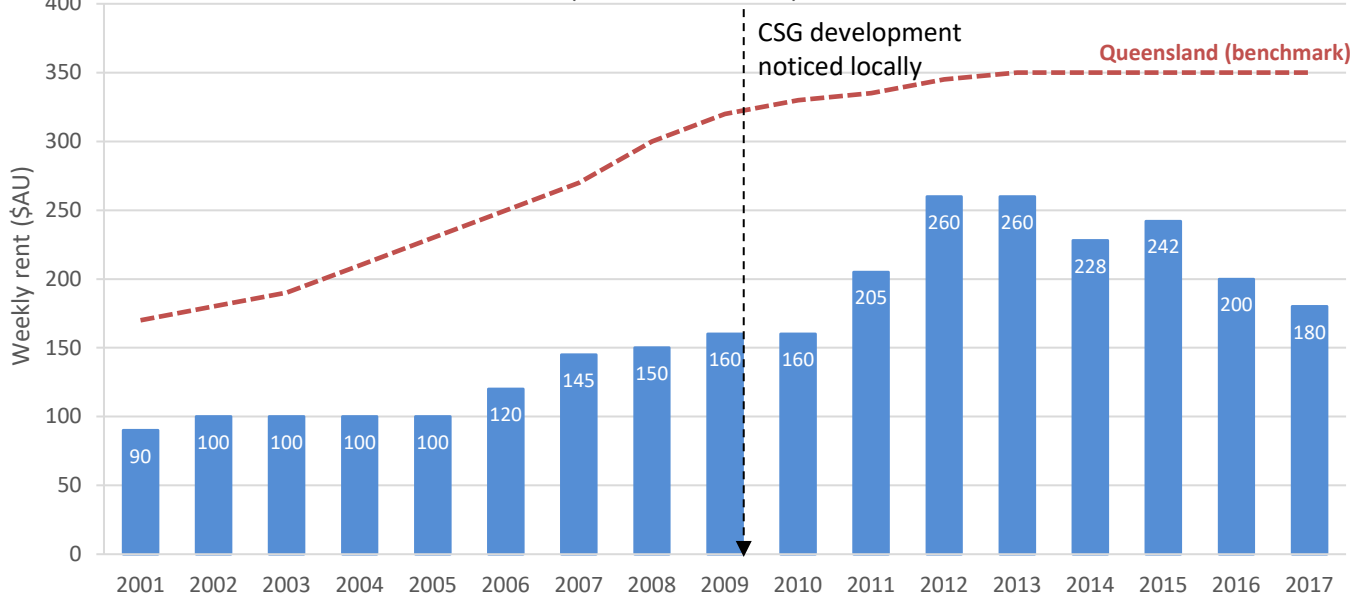
4. Housing

4a. Median house sale price



4b. Median weekly rent

(3-bedroom house)

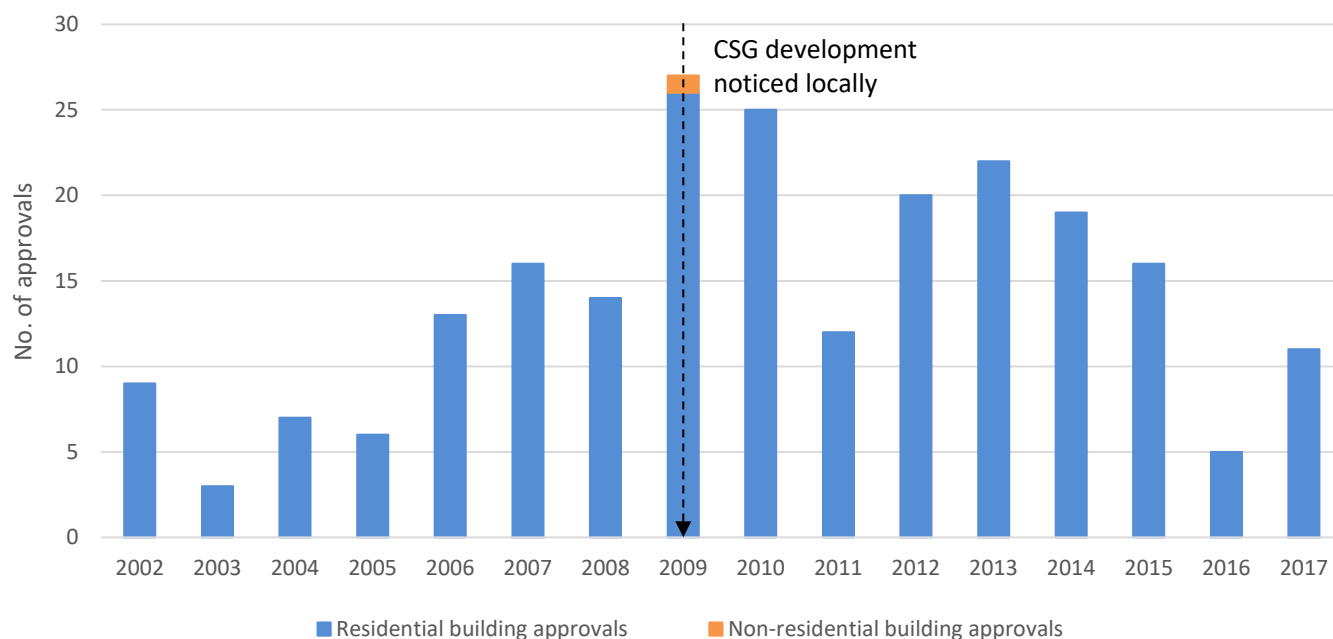


Data notes

- 4a source: QGSO Regional Database dataset 'Residential land and dwelling sales (Year Ended 30 Sep 2000 to Year Ended 30 Sept 2017) [DNRM] (ASGS 2016)', <http://www.qgso.qld.gov.au/products/tables/qld-regional-database/index.php>
- 4b source: QGSO Regional Database dataset 'Median rent (Year Ended 30 Sep 1990 to Year Ended 31 Dec 2017) [RTA] (ASGS 2016)', <http://www.qgso.qld.gov.au/products/tables/qld-regional-database/index.php>
- Data based on SA2 (Roma Region) statistical boundary
- Prior to 2017, rent data is reported for financial years; e.g. FY2016 corresponds to July 2015 to June 2016

4. Housing

4c. New building approvals



Data notes

- Source: QGSO Regional Database dataset 'Building Approvals (Jul 2001 to Dec 2017) [ABS 8731.0] (ASGS 2016)', <http://www.qgso.qld.gov.au/products/tables/qld-regional-database/index.php>
- Data based on SA2 (Roma Region) statistical boundary
- Approvals shown for private buildings only; public developments are excluded
- Prior to 2017, building approvals are reported for financial years; e.g. FY2016 corresponds to July 2015 to June 2016

5. Safety & wellbeing

2017 summary

The overall crime rate in Wallumbilla has returned to low, pre-CSG levels. In 2017, drug offences remain elevated at the peak rate, but are low (around half) compared to the QLD average. Residents continue to have a positive sense of security and community safety, despite having heightened awareness of drug presence in their community.

Context

- Drug offences are perceived to be on the rise in all rural Queensland towns.
- Because of Wallumbilla's small population, crime rate trends are easily distorted by small spikes.
- The local officer-in-charge role was vacant for ~18 months, before being filled in early 2018.
- Crime statistics can be subject to significant variation based on factors such as police resourcing, enforcement and prevention strategies, and community awareness and reporting.

Trends reflected in the data

Historical trend: Total crime in Wallumbilla has stayed well below the QLD benchmark, at less than half the state average. Offences against property (e.g. theft and vandalism) have historically been the most prevalent types of crime in Wallumbilla.

During CSG construction period (2011 – 2014): The town experienced a significant increase and greater fluctuations in total crime from 2011 – 2014, although remained below the QLD crime rate. Offences in the "other offences" category (e.g. drug possession and traffic infringements) dominated Wallumbilla's crime statistics during this period. Traffic offences, in particular, spiked noticeably above the QLD benchmark; in 2011, 2013 and 2014, these offences were around four times higher than the preceding seven years. A relative increase in "other theft" (excluding unlawful entry) and drug offences was recorded from 2012 – 2014.

Since CSG construction period (2015 – 2017): The crime rate in Wallumbilla has declined since the 2014 peak. Traffic offences have dropped significantly, returning to historic levels. In 2017, drug offences remain elevated, but are low (around half) compared to the QLD average.

Community insights and perceptions

During CSG construction period (2011 – 2014):

"There was a lot of roadworks and people speeding through roadworks". An increased police presence on the highway was observed by locals.

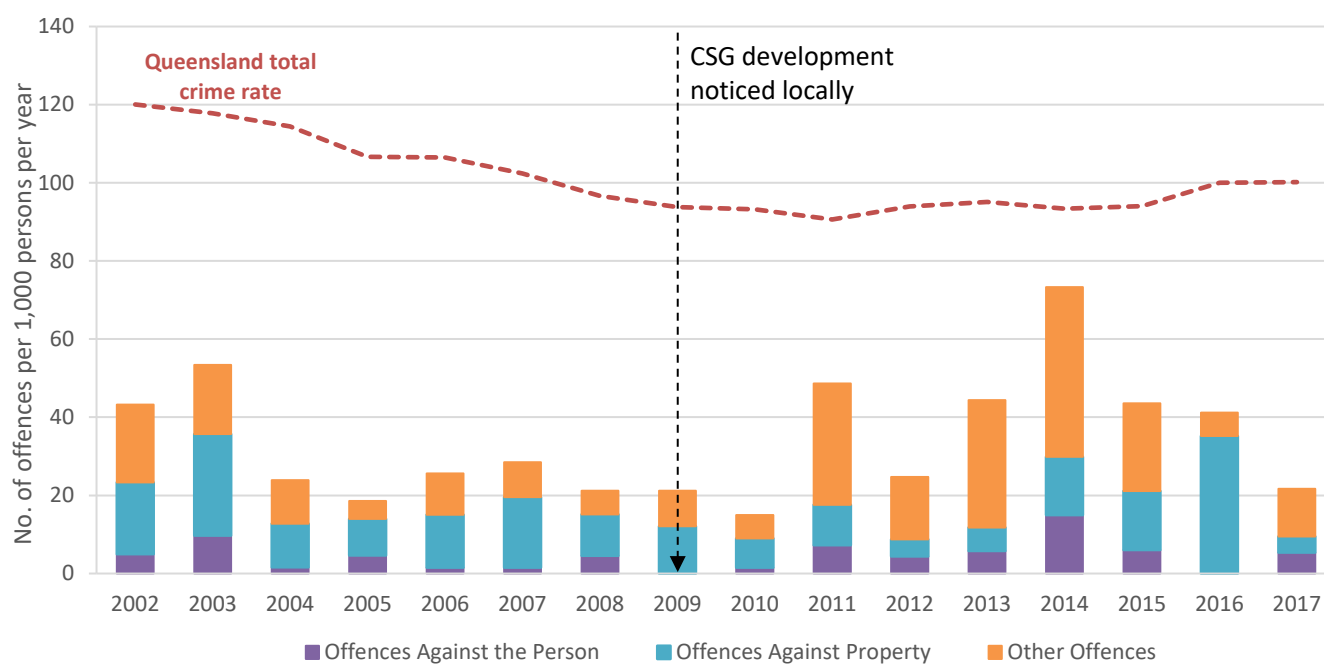
Since CSG construction period (2015 – now):

Residents reported that Wallumbilla remains a safe and friendly place to live. One interviewee suggested that a recent vacancy in the local Officer in Charge role may have reduced police enforcement capacity in 2017. Decreased traffic volumes between Miles and Roma may have also contributed to the significant drop in traffic offences in the Wallumbilla district. Interviewees are aware of a "drug problem" in town, and this is thought to be driving increased theft offences. The drug situation is perceived to be stable in terms of prevalence; however, media and police attention seems to have increased. Drug use is reportedly increasing the load on emergency services with more frequent drug-related call-outs.

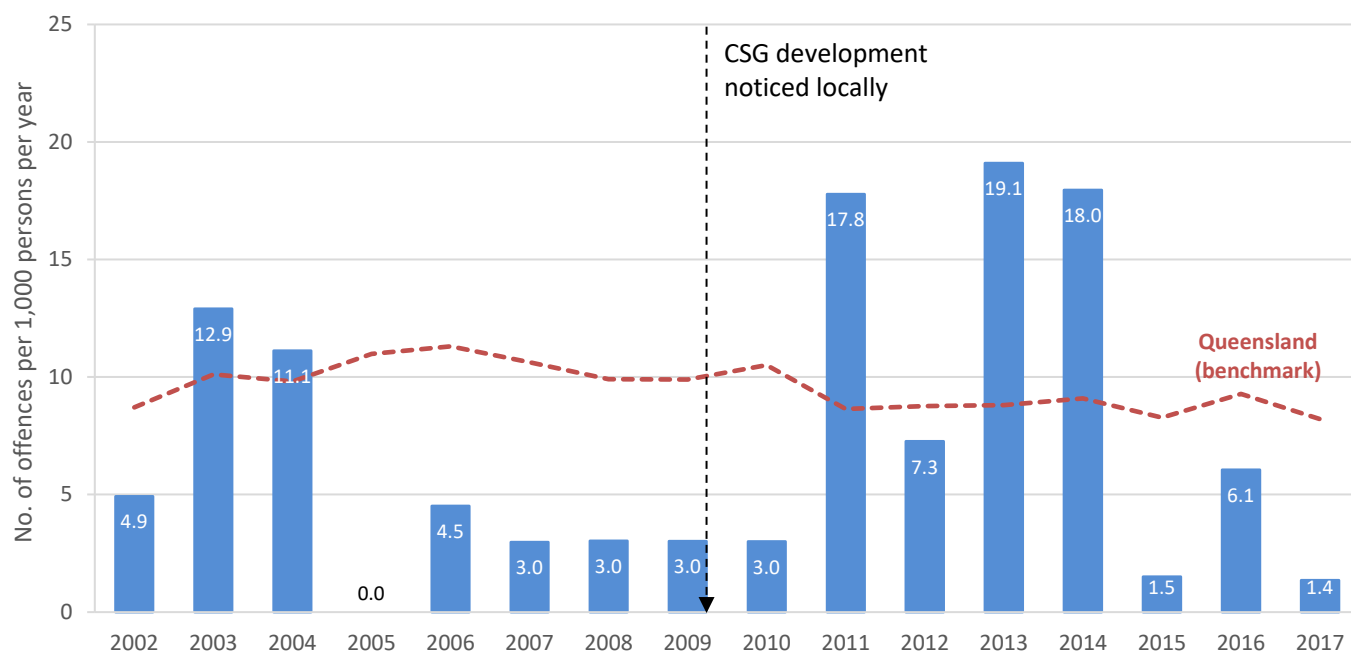
Future expectations: Now, cheaper housing may attract new residents more likely to use drugs.

5. Safety & wellbeing

5a. Total offences



5b. Traffic and related offences

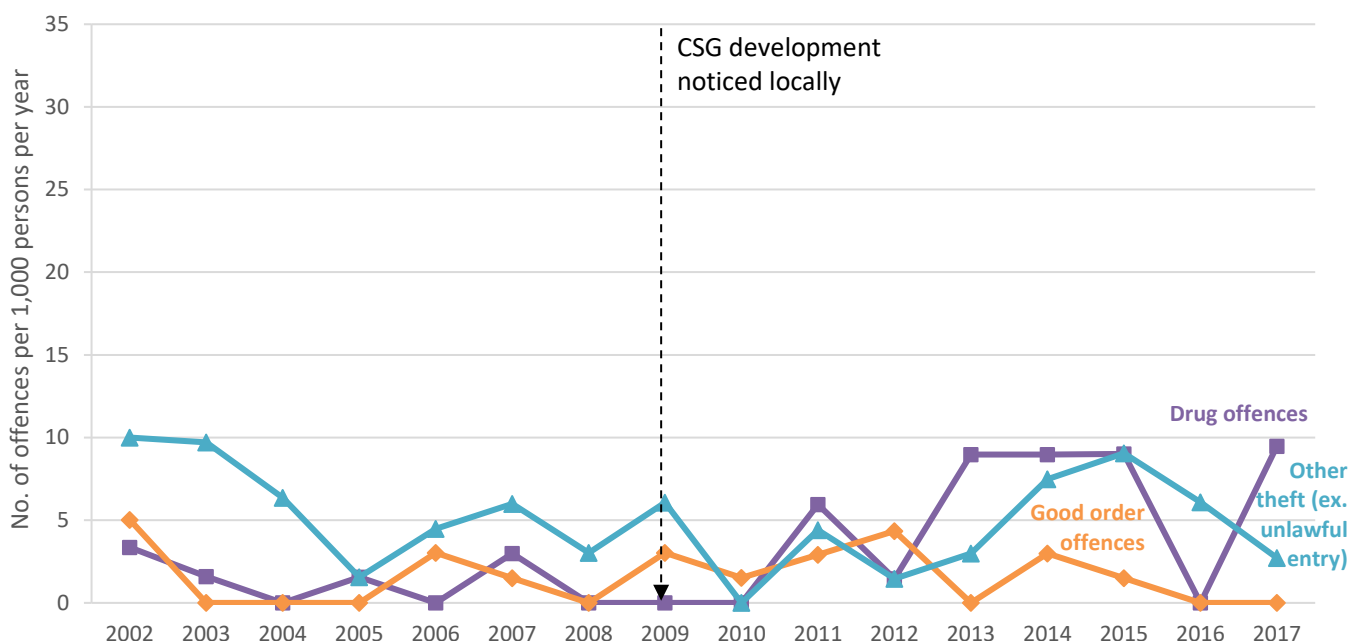


Data notes

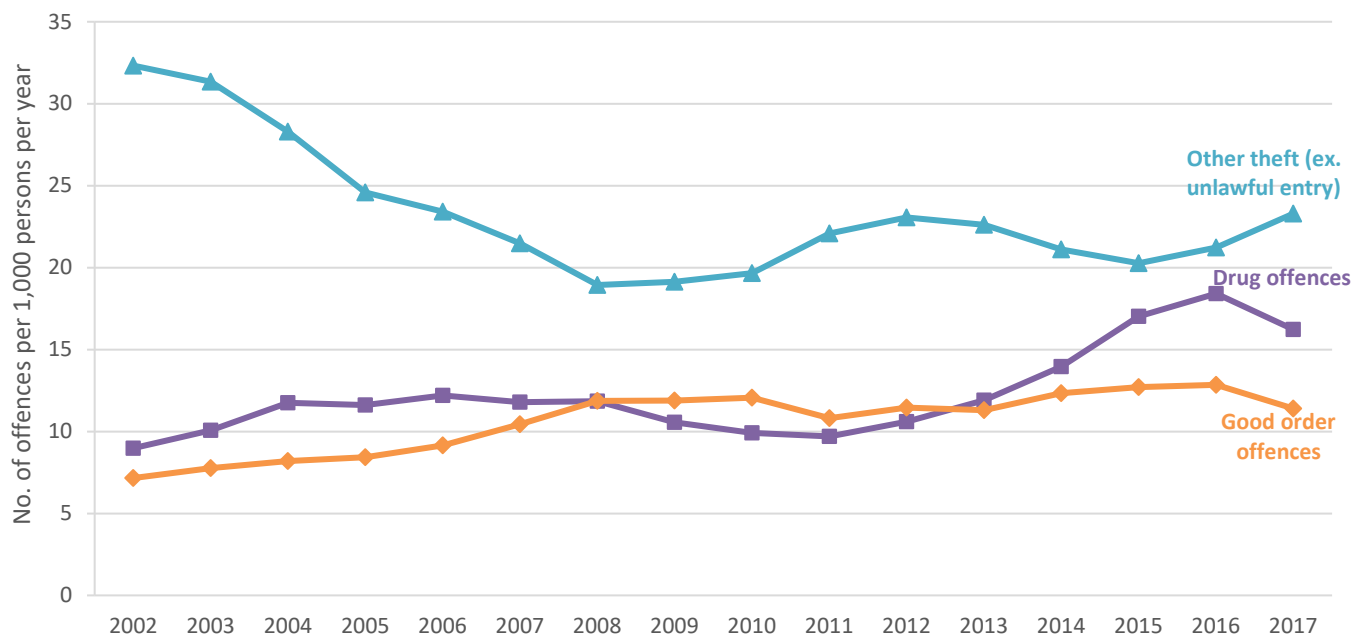
- Source: Queensland Police Service (QPS), <https://www.police.qld.gov.au/online/data/>
- Crime rate data (per 100,000 people) obtained by QPS Division and Queensland State; data was adjusted to be presented as number of offences per 1,000 people per year

5. Safety & wellbeing

5c. Other relevant offences - Wallumbilla



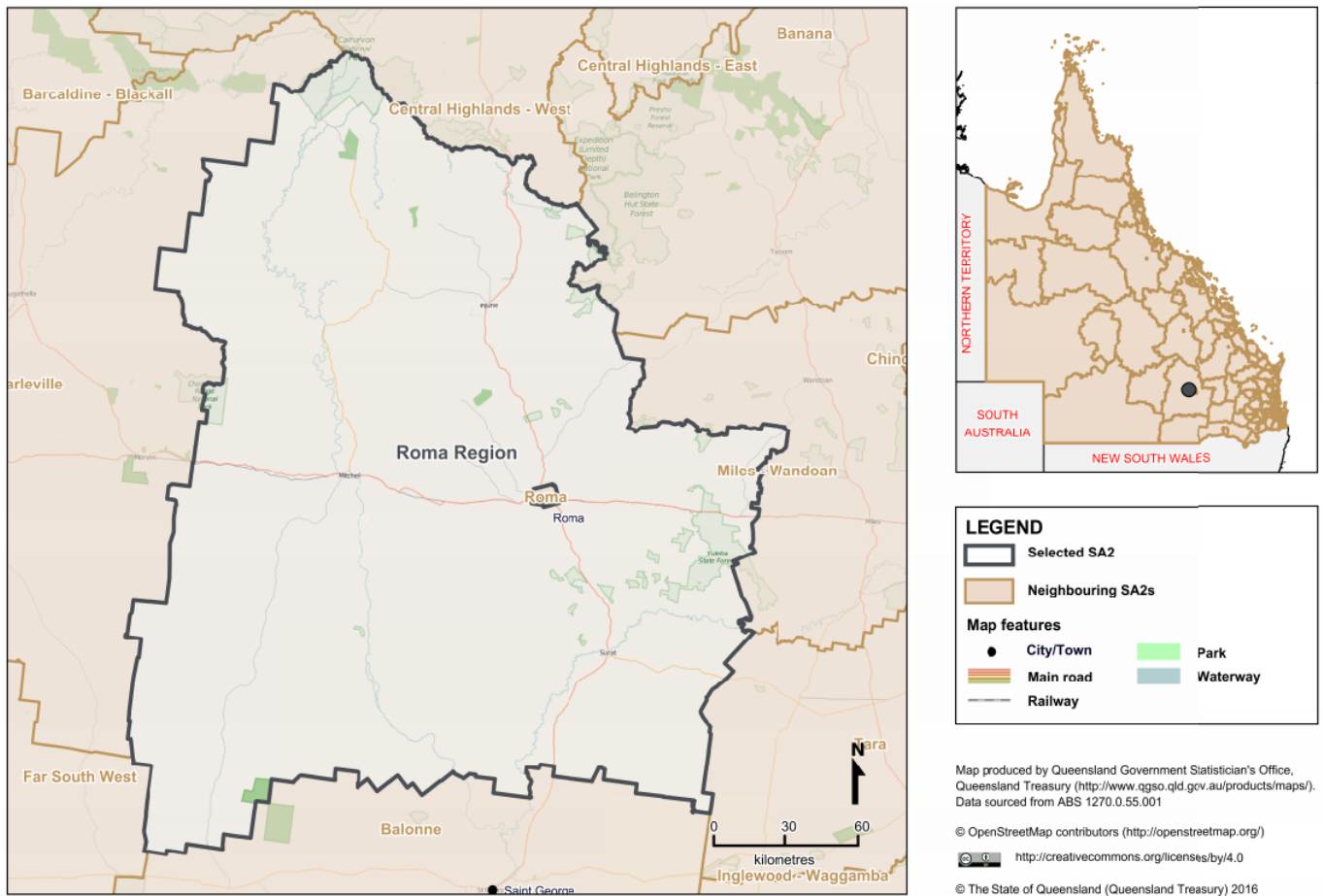
5d. Other relevant offences - Queensland



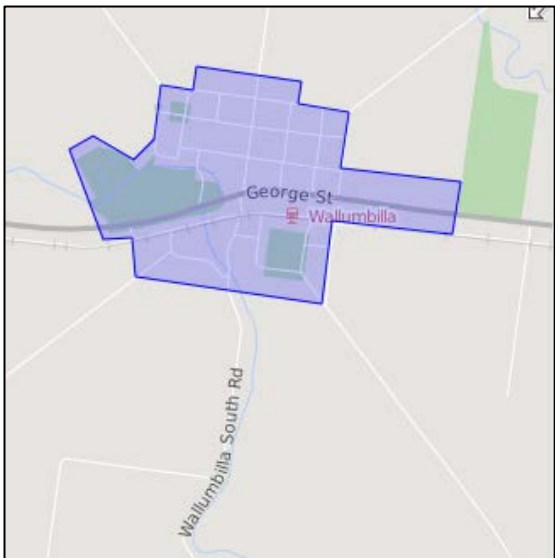
Data notes

- Source: Queensland Police Service (QPS), <https://www.police.qld.gov.au/online/data/>
- Crime rate data (per 100,000 people) obtained by QPS Division and Queensland State; data was adjusted to be presented as number of offences per 1,000 people per year

Appendix A: Spatial boundary maps (SA2, UCL and postcode)



Roma Region statistical area 2 (SA2) boundary (2016, ASGS Code 307011177)

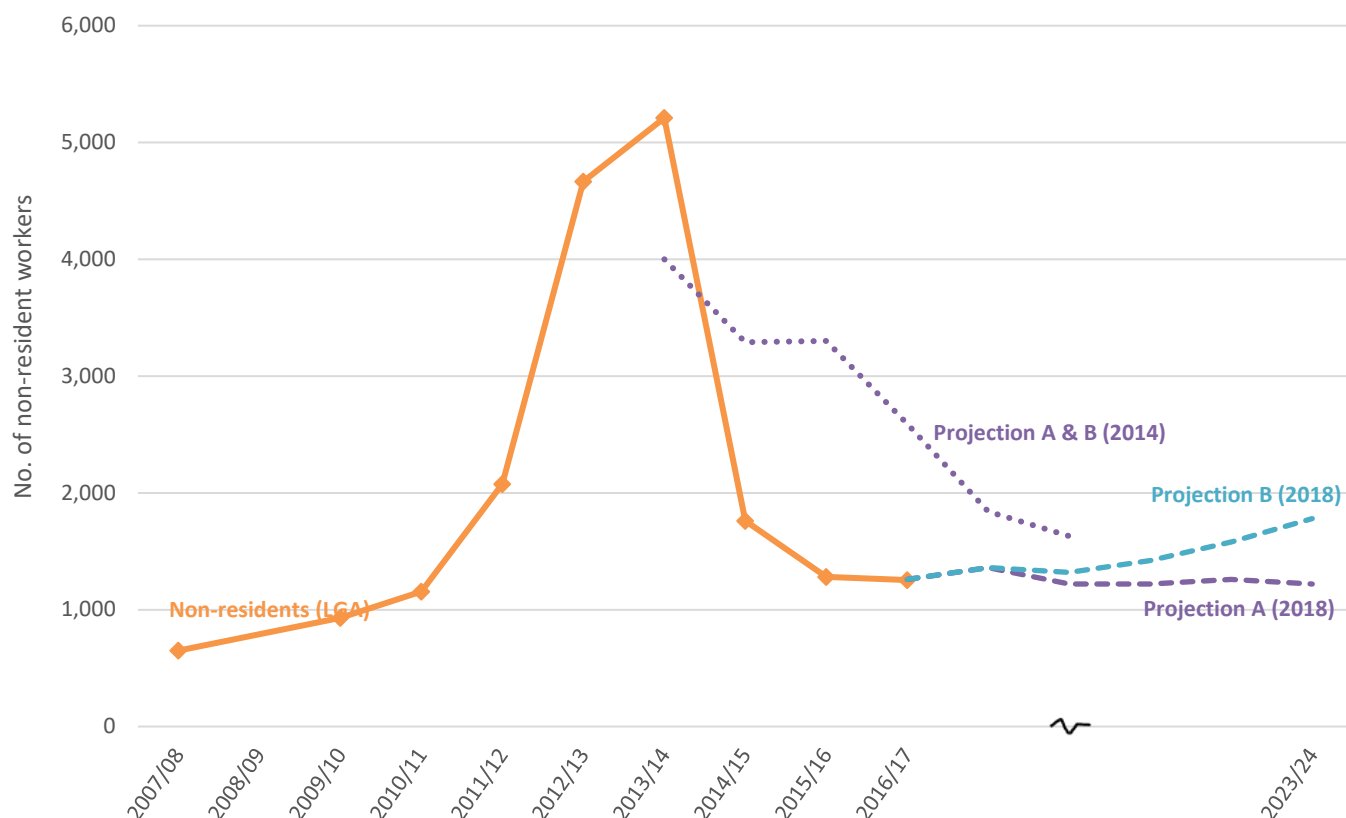


Wallumbilla urban centre and locality (UCL) boundary



Wallumbilla postcode boundary 4428

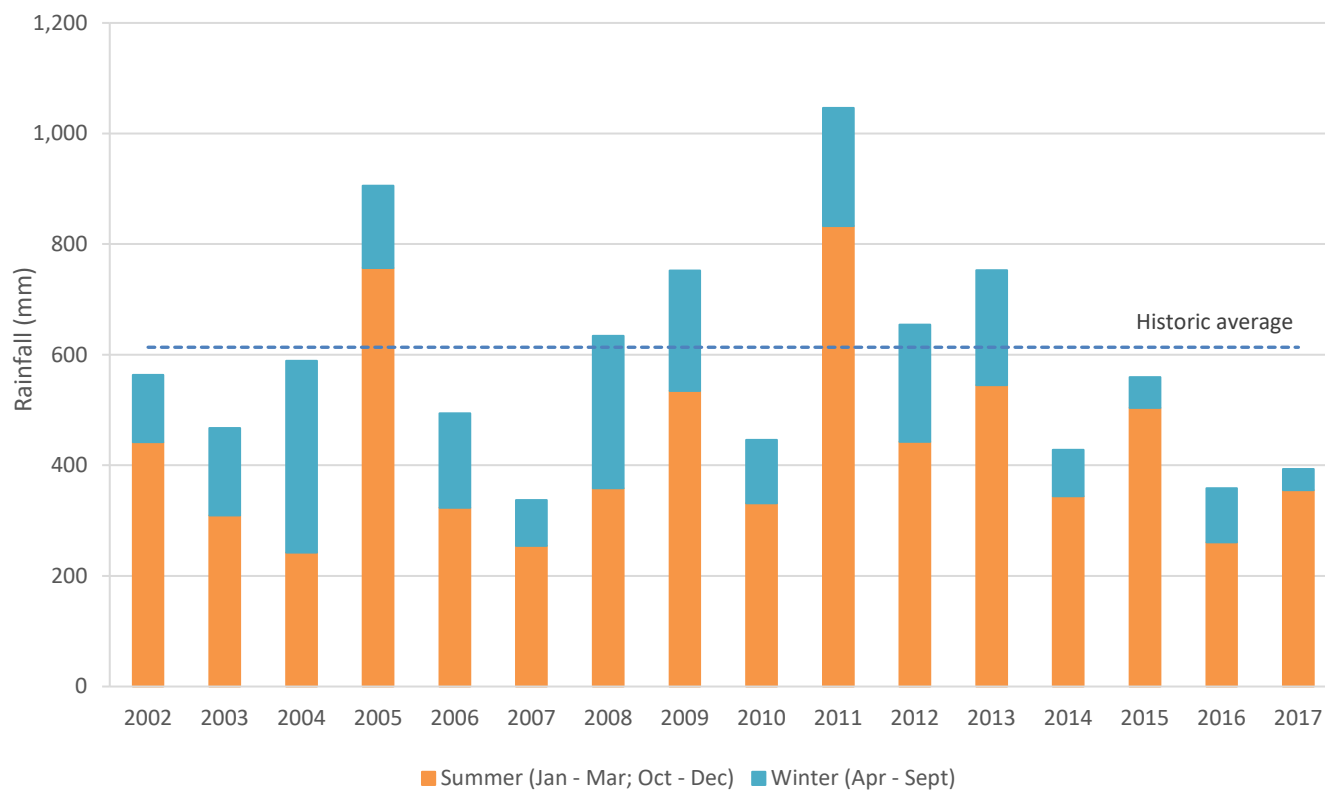
Appendix B: Non-resident population projections - Maranoa Region



Data notes

- Non-resident worker estimates by LGA from the QGSO 'Surat Basin Population Report' (ASGC 2016); 2017 version available here: <http://www.qgso.qld.gov.au/products/reports/surat-basin-pop-report/surat-basin-pop-report-2017.pdf>
- Non-resident worker projections (2018) by LGA from QGSO table 'Surat Basin: Non-resident population projections, by local government area (LGA), 2018 to 2024' (ASGS 2016), <http://www.qgso.qld.gov.au/subjects/demography/population-projections/tables/surat-basin-non-resident-pop-proj-lga/index.php>
- Non-resident workers projections (2014) by LGA from QGSO report 'Surat Basin non-resident population projections: 2014 to 2020', <http://www.qgso.qld.gov.au/products/reports/surat-basin-non-resident-pop-proj/surat-basin-non-resident-pop-proj-2014-2020.pdf>
- Series A projection is based on the number of non-resident workers on-shift who were engaged in existing resource operations and associated infrastructure activities in the area at June 2014. The projection takes into account future changes to those operational workforces as advised by resource company sources, as well as the estimated construction and operational workforces of Category A projects (i.e. those that are approved and have reached a financial close).
- Series B projection includes the Series A projection plus projected growth in the non-resident population arising from Category B projects (those that are approved but have yet to reach a financial close).

Appendix C: Wallumbilla rainfall (2002 – 2017)



Data notes

- Source: Bureau of Meteorology Climate Data online, <http://www.bom.gov.au/climate/data/>
- Rainfall observations reported for Yuleba Garden St Rainfall Station

Appendix D: Project Information

The University of Queensland is conducting research into the social and economic impacts of coal seam gas (CSG) development. The project has focused on the combined impacts of the multiple CSG developments in the Western Downs region of Queensland as an initial case study. That focus has now expanded to include other local government areas – Maranoa, Toowoomba, and Isaac.

Research project history

- **Engagement:** People from the community, government and industry worked with researchers to identify the most important ‘indicators’ to monitor. This consultation process helped to develop a shared understanding of social and economic development in the community and created a framework for reporting and discussion.
- **Indicator monitoring:** The team identified ways to calculate and report the impact of multiple CSG projects against the agreed set of indicators.

The research team

Dr Kathy Witt, Centre for Coal Seam Gas, The University of Queensland has led this research since May 2017 and joined the original project team in 2014.

A large team of researchers has contributed to this project since 2013, including:

- Assoc. Prof. Will Rifkin, University of Newcastle (led this project while at The University of Queensland from April 2012 – April 2017)
- Dr Jo-Anne Everingham, Senior Research Scientist, Centre for Social Responsibility in Mining, The University of Queensland (CSRM).
- Ms Simone Elias, Research Assistant, CCSG 2018
- Ms Sarah Choudhury, Research Assistant, CSRM (2017) and Ms Bec Colvin, (2016).
- Ms Sherylee Johnson, Research Technician, CCSG (2013-2016).
- Professor David Brereton, Associate Director, Sustainable Minerals Institute (2012-2016).
- Dr Vikki Uhlmann, Research Manager, CSRM (2013 -2014).
- Ms Kylie May, Research Analyst, CSRM (2013 – 2014).

Reporting timeframes: The data collection for the project has been occurring annually since 2013. Project outcomes, recommendations, and reports have been released periodically. The timeframe for some datasets, such as those from the Australian Taxation Office, lags behind the main data used in this report—this is due to unique data collection and reporting requirements of this agency.

Ethics approvals: This study has been cleared by the human research ethics committee of The University of Queensland in accordance with the National Health and Medical Research Council's guidelines (Research Ethics clearance approval no. 2013000587).

Questions: Contact the lead researcher, **Dr Katherine Witt**
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W: www.boomtown-indicators.org | W: www.ccsq.uq.edu.au

If you would like to speak to an officer of the University not involved in the study, you may contact the Ethics Officer on 07 3365 3924.