

Research Project:

**Cumulative socioeconomic impacts
of CSG Development in the Western Downs**

DATA REPORT

**INDICATORS OF CHANGE
IN
MILES AND DISTRICT COMMUNITY**

Interviews March - April 2017

Statistical data updated in March 2017 (using 2016 data)

This version June 2017

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The Miles CSG Story (to 2016)

The 'Miles CSG-Development story' was developed in consultation with key members of the Miles and district community and business organisations, including: real estate agents, motels and other local businesses (including some with contracts with coal seam gas companies), police, schools, welfare agencies, and local and state 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 'Miles CSG-Development story', to be used in combination with the publicly available data. The following indicators were discussed:

- | | |
|-----------------|--|
| 1. Population | 5. Training |
| 2. Unemployment | 6. Top offences recorded by police |
| 3. Income | 7. Staff availability / local skills shortages |
| 4. Housing | 8. Available tourist beds. |

Interviews were conducted in 2013 during the peak of the construction phase of CSG development and again in 2017. The data has been updated in 2017 and an interpretation of the changes noticed by the researchers provided.

Miles is seen by those interviewed to be a family-friendly town. Miles experienced rapid population growth first in 2008, with the arrival of non-resident workers in the area. In 2013, one interviewee noted that "9 out of 10 people we see on the street seem to be strangers". CSG development has brought a marked increase in the apparent population, although many would not be permanent residents, with 1 CSG worker for every 4 residents in Miles in 2013. Most were in camps outside town. After 2013 the number of non-resident workers in the town and region decreased dramatically to approx. 1 CSG for every 20 Miles residents in 2016. This reduction was greater than the projected decrease.

CSG development had the effect of significantly increasing average taxable personal income in the 2012-13 and 2013-14 financial years, bringing the average income up to equal the Qld average. Business income for the town as a whole increased seven-fold from \$1M in 2012 to over \$7M in 2013. The number of businesses doubled from around 50 in 2010 to around 100 in 2012 and then almost doubled again to 180 in 2013. However those interviewed did not report seeing the effects of increased wealth in the community.

Interviewees expressed the view that the 'boom' was not as beneficial to local businesses as expected, as locals travelled to larger centres for spending. Businesses were also said to have lost workers to the CSG industry, with skills shortages rising from 39% to 61% between 2009 and 2013. Unemployment, dropped to very low in 2013 but has risen since. In 2016, it is back to pre-CSG levels.

House prices and rents in Miles have traditionally been lower than the median for the state or Brisbane. Increased demand from the CSG sector boosted rents past the state median in 2012-3, with rents being the highest in the state in 2013. Some local residents were reported to take advantage of the escalating prices, and they sold or subdivided their block. There was an exceptionally high number of residential building approvals from 2012-2015. Departures of older, civically involved residents were said to contribute to a loss of social capital in the town. Volunteer numbers dropped. The higher rents were observed to cause residents with lower income levels to leave town. The quality of the housing stock has risen, but interviewees commented that there are now a lot of empty houses. Since

2012/13 there have been drastic decline in sales, housing prices, and rents, suggesting shortcomings in the management of expectations and impacts of the brief 'boom' period.

The influx of mostly male CSG workers is reported to have affected feelings of wellbeing and to have caused a shift in town identity. Interviewees noted that women changed their socialising and exercise regimes. People drove their children to school instead of having them walk or ride, they said, due to the presence of many strangers and added heavy vehicle traffic.

Reported good order offences and drug offences rose significantly in the Miles Police District. New policing methods introduced in anticipation of impacts from CSG development may have contributed to this upsurge, as police were more vigilant. Since 2011, total offences have increased significantly with an upward trajectory and recent spike in 2015/16; total offences now stand at double the Queensland average. Traffic and especially drug offences continue to increase to potentially problematic levels.

This booklet provides the 'Miles CSG story' based on the range of priority indicators that we tracked. We would like to thank members of the Miles community for their warm welcome and the gift of their time. We hope that we have done justice to their contributions to this investigation.

The UQ 'Cumulative Impacts' Research Team, February 2017

INTRODUCTION

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. In this document, we present findings on the town of Miles.

Research project aims

- **Find key indicators** – we want to identify ways to calculate and report the impact of multiple CSG projects in terms of a few numbers that are important and credible, e.g., weekly rents.
- **Involve people from the community, government, and industry** – we are asking stakeholders to decide which 'indicators' are the most important to monitor. In working with stakeholders, we aim to help develop a shared understanding of social and economic development in the community and create a frame of reference for ongoing, collaborative decision-making in the region.
- **Lessons to help other regions** – we want to develop models and approaches that can be used to measure, track and analyse cumulative impacts in other regions.

The research team

- Assoc. Prof. Will Rifkin, Industry Affiliate, Centre for Coal Seam Gas (CCSG) and Centre for Social Responsibility in Mining (CSRM).
- Dr Katherine Witt, Research Fellow, CCSG.
- Dr Jo-Anne Everingham, Senior Research Scientist, CSRM.
- Ms Sarah Choudhury, Research Assistant, CSRM (2017).
- 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).

Funding: The project receives industry funding through the Centre for Coal Seam Gas (CCSG), which is within the University of Queensland's Sustainable Minerals Institute. CCSG's industry partners include QGC, Arrow Energy, Santos, and Australia-Pacific LNG. These organisations are providing valuable information on their operations. Researchers are employed by the U of Queensland.

Collaborators: We are getting help from - Queensland government agencies and CSIRO researchers funded by the Gas Industry Social and Environmental Research Alliance (GISERA).

Community participation: In March 2014, a small research team from UQ started to visit communities to introduce the project. We gathered information, mostly from government sources, on impacts that key stakeholders in these communities perceived to be important. We visit each community to discuss that data, to get their insights on what has been occurring.

Reporting timeframes: The data collection for the project has been occurring annually since 2013. Project outcomes, recommendations, and reports have been released periodically. This latest version includes information from the 2017 interviews. Updates are planned for 2018 (*i.e.*, the duration of the project).

Each report contains an updated version of data presented previously. We hope that each page can be read and understood without us being present.

Ethics guidelines we follow: 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, Centre for Social Responsibility in Mining, SMI, The University Of Queensland, Brisbane, QLD 4072 , Ph: 0418 619 341, Email: k.witt@uq.edu.au, www.csrsm.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.

PRIORITY INDICATORS FOR MILES AND DISTRICT

DEMOGRAPHICS OF MILES

Map of Town and District

1. Population

EMPLOYMENT, BUSINESS & INCOME IN MILES

2. Unemployment
3. Income

HOUSING IN MILES

4. Median house prices
5. Median rents

WELLBEING IN MILES

6. Selected offences

EXOGENOUS FACTORS

7. Rainfall
8. Petrol prices

CSG

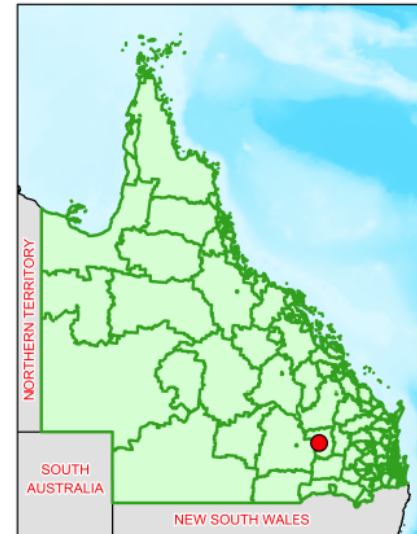
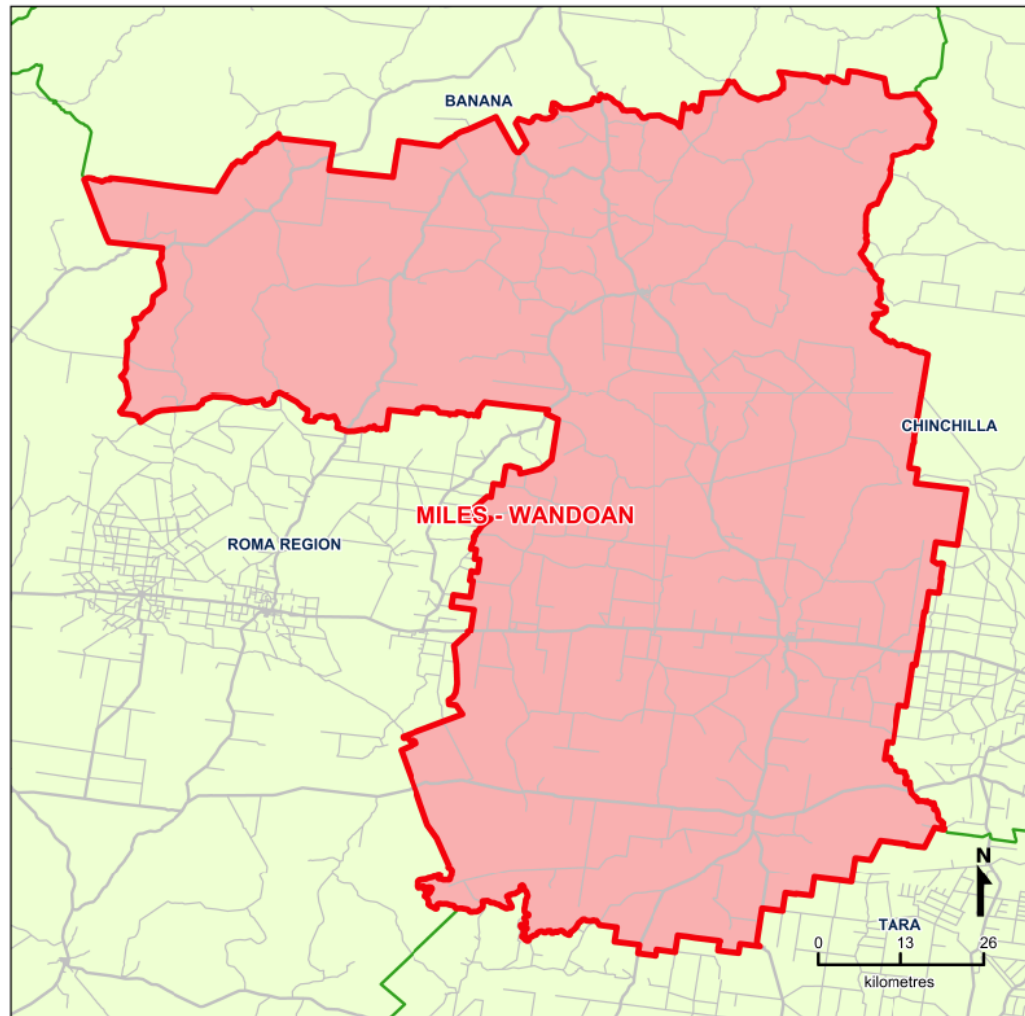
Graph of CSG wells drilled in Murilla Shire LGA

IMPACTS ON INDIGENOUS MEMBERS OF THE COMMUNITY

Efforts are ongoing to select the most appropriate indicators for measuring impacts on Indigenous residents and businesses in the Western Downs. A case study of the Aboriginal employment program of one proponent has been completed by UQ researchers. A UQ specialist has evaluated the Reconciliation Action Plan of a proponent. A UQ team has identified challenges in making and implementing agreements between Aboriginal groups and proponents in the coal seam gas arena (addressing issues like group politics and Native Title claims).

Other Indicators Examined for Miles	Indicator-related research being conducted
% 65 year olds & over, % youth in Miles, No. school enrolments, school suspensions, population growth rates	• Resilience (UQ)
	• Community aspirations (CSIRO)
	• Public health – PhD study (UQ)
	• CSG and health study design (CSIRO/UQ)
Rental vacancy rates, No. applicants on Q Dept. of Housing waitlist	• Demographic & economic trends (CSIRO/UQ)
Post high school destinations, % traineeship completions, % apprenticeship completions	• Business (women in business) – PhD study (UQ)
Skills shortages in business, Tourist accommodation,	• Water Chemistry Atlas (UQ)
Governance: Responses on housing, Council amalgamation, DA approval times,	• Agriculture & co-existence (UQ & CSIRO)
	• Environmental impacts – biodiversity (CSIRO)

Queensland Statistical Areas, Level 2 (SA2), 2011 - Miles - Wandoan (ASGS Code 307011175)



LEGEND

- SELECTED REGION
- SA2 REGION BOUNDARY
- Road Network
- Cities/Towns



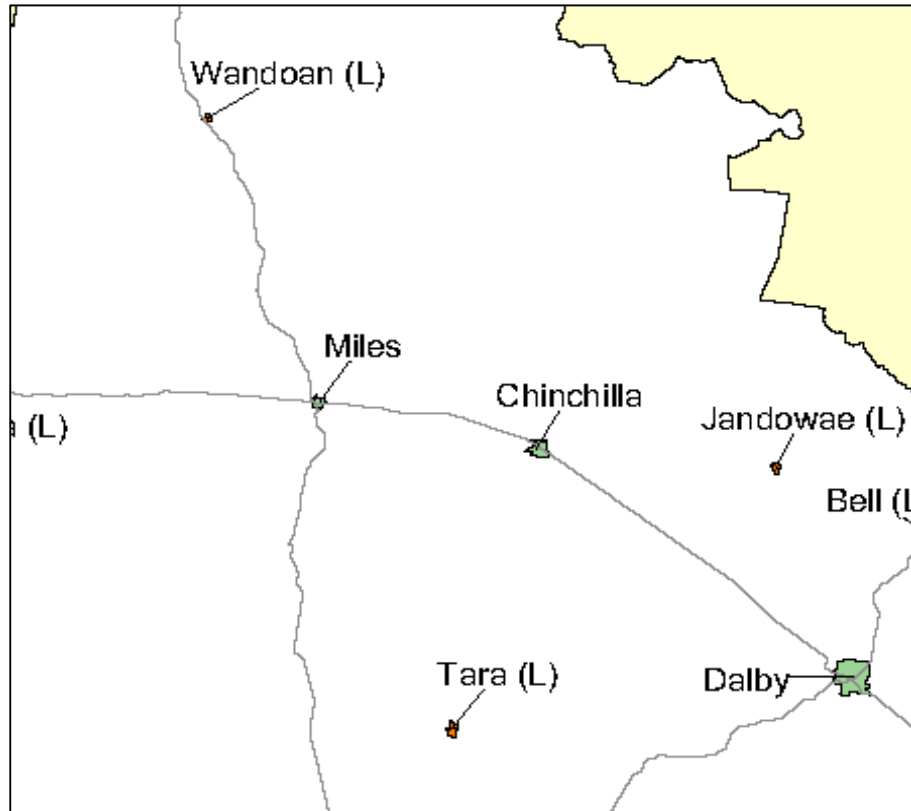
Map produced by Office of Economic and Statistical Research, Queensland Treasury (www.oestr.qld.gov.au/maps). Data sourced from Australian Bureau of Statistics, Australian Statistical Geography Standard (ASGS), 2011 (cat. no. 1270.0.55.001) Queensland Government, State Digital Road Network (SDRN)
© The State of Queensland (Queensland Treasury) 2011

Miles – Wandoan SA2 Region

Source: <http://www.qgso.qld.gov.au/products/maps/qld-sa1-asgs-2011-within-sa2/index.php>

This information has been compiled for use in consultation with the Miles community

Miles UCL Map



Source:

<http://abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/1270.0.55.004July%202011?OpenDocument>

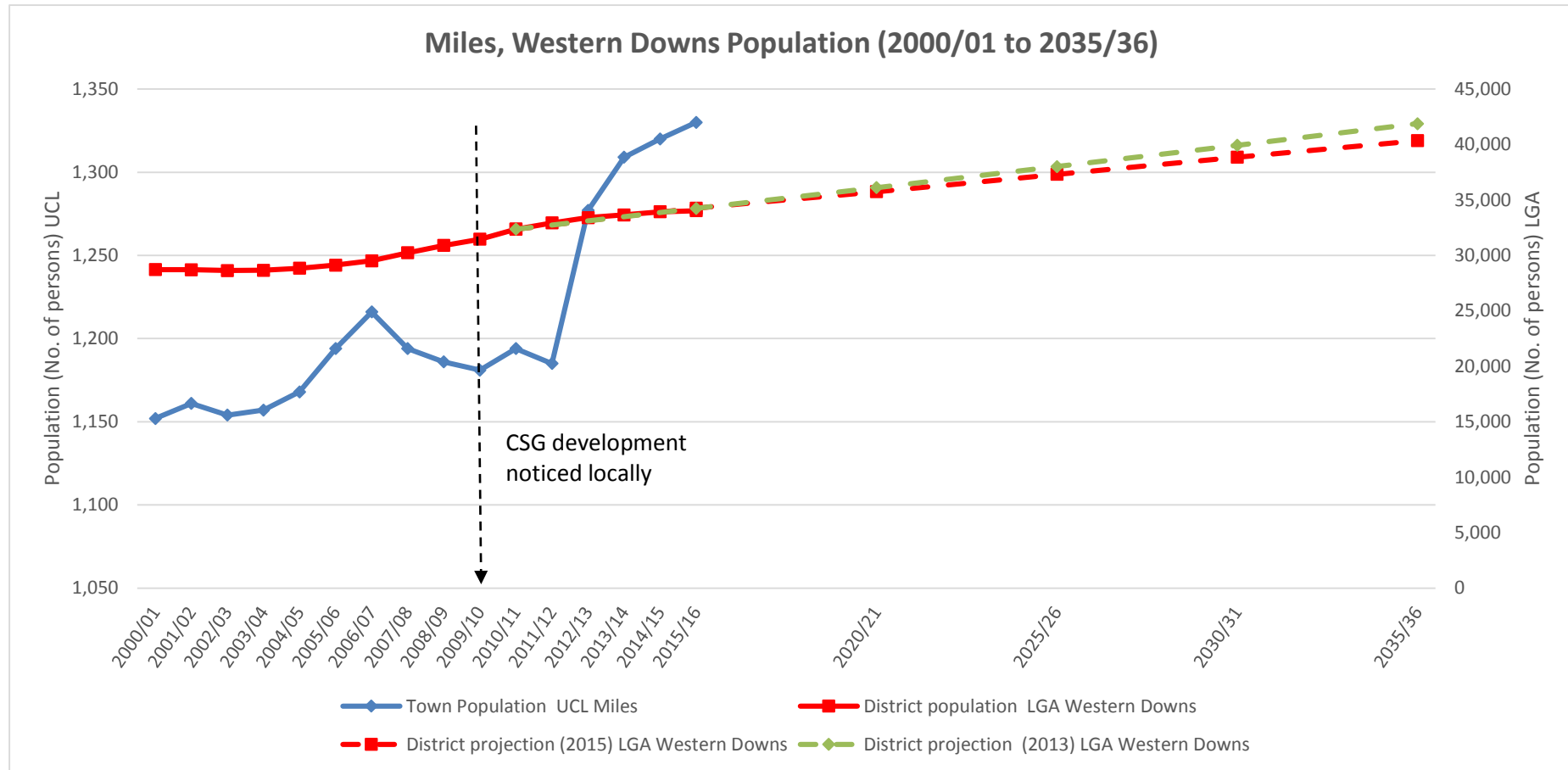
Miles postcode boundary 4415



Source:

<https://www.google.com.au/maps/place/Miles+QLD/data=!4m2!3m1!1s0x6bbea19301a21619:0x400eef17f20a7a0?sa=X&ved=0ahUKEwimouuC3e7KAhXHmpQKHRXUAYYQ8gEIgjAA>

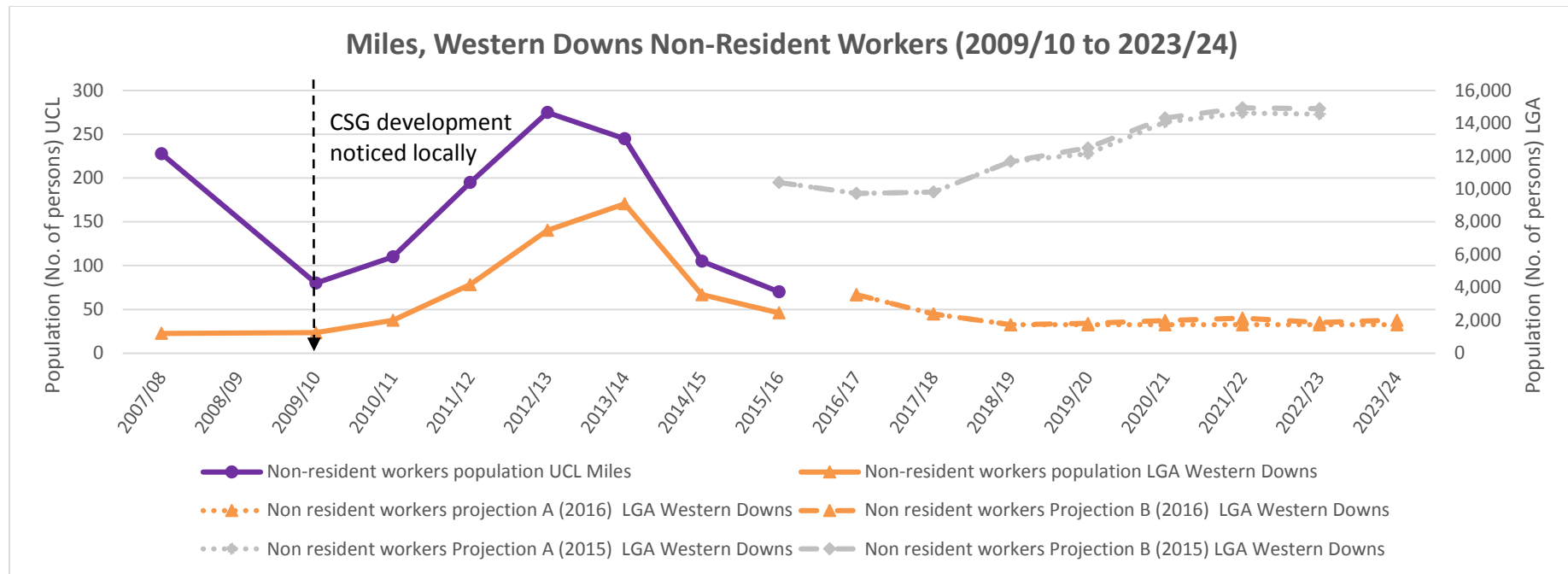
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Data sources

- Population projections by LGA (2015 edition) from QGSO table 'Projected population (medium series), by local government area, Queensland, 2011 to 2036', Source: Qld Government population projections, 2015 edition; ABS Regional population growth, Australia 2013-14' (ASGC 2001), <http://www.qgso.qld.gov.au/subjects/demography/population-projections/tables/proj-pop-lga-qld/index.php>
- Population projections by LGA (2013 edition) from archived QGSO table 'Projected population (medium series), by local government area, Queensland, 2011 to 2036', Source: Qld Government (2014), Population projections by LGA, 2013 edition' (ASGC 2001)
- Population and non resident workers population estimates (LGA and UCLs) from the QGSO 'Surat Basin Population Report, 2016' (ASGC 2016), <http://www.qgso.qld.gov.au/products/reports/surat-basin-pop-report/surat-basin-pop-report-2016.pdf>

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Data sources

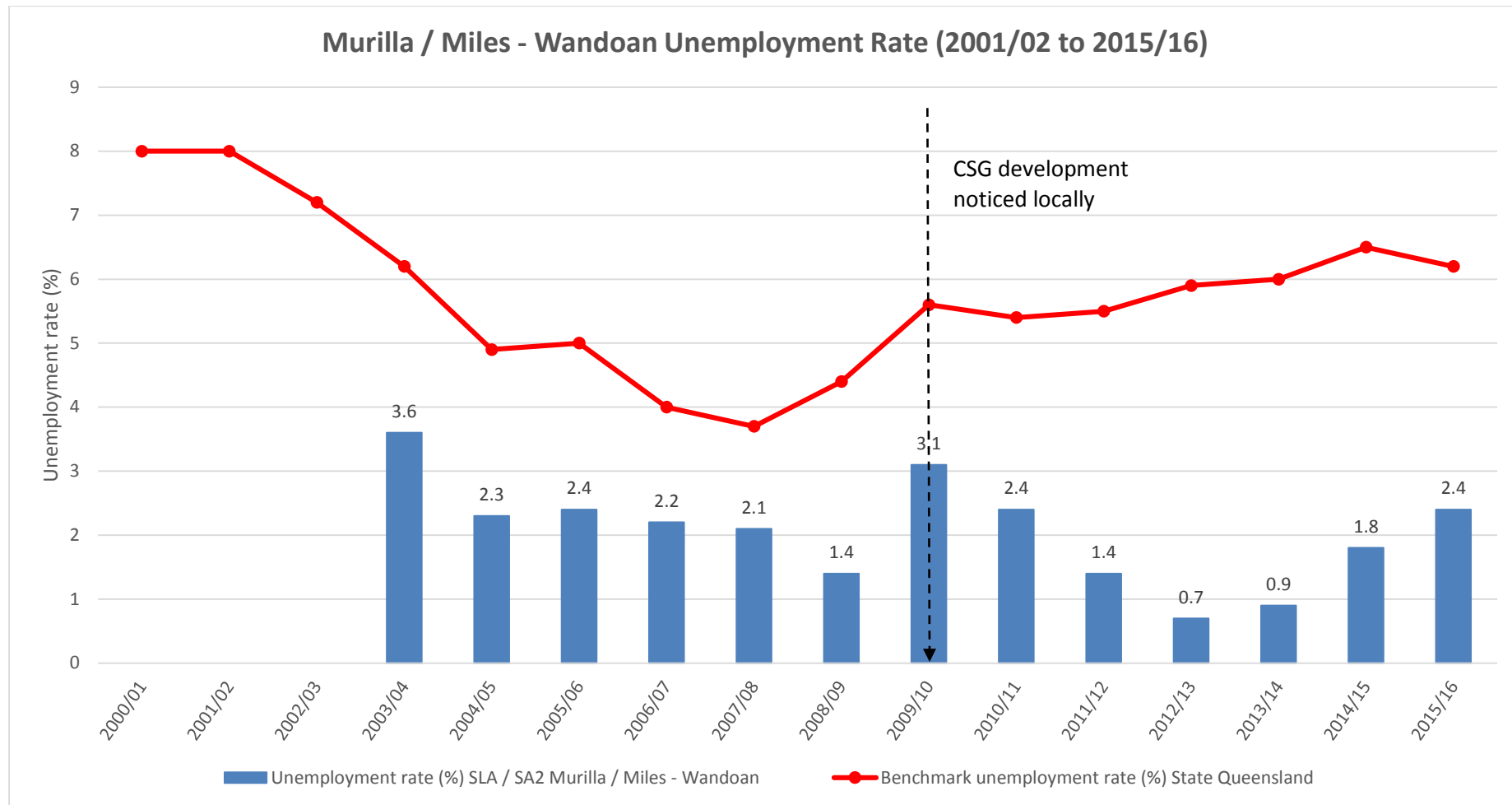
- Population and non resident workers population estimates (LGA and UCLs) from the QGSO 'Surat Basin Population Report, 2016', <http://www.qgso.qld.gov.au/products/reports/surat-basin-pop-report/surat-basin-pop-report-2016.pdf>
- Non resident workers projections (2016) by LGA from QGSO table 'Surat Basin: Non-resident population projections, by local government area (LGA), 2016 to 2022', <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: 2015 to 2021', <http://www.qgso.qld.gov.au/products/reports/surat-basin-non-resident-pop-proj/surat-basin-non-resident-pop-proj-2015-2021.pdf>

Notes about Non resident workers projections (2016) by LGA

- The projection series are largely based on the status of projects in the environmental impact statement (EIS) process at the time of preparation (March 2016). The projections also include some projects outside the approvals process.
- 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 2015. The projection takes into account future changes to those operational workforces as advised by resource company sources, as well as the estimated non-resident construction and operational workforces of Category A projects (i.e. those that had reached final investment decision (FID)) at the time of preparation.
- Series B projection includes the Series A projection plus projected growth in the non-resident population arising from Category B projects (those that have an EIS approved but have yet to reach FID).

Data & Perceptions about population

- **History and Trend:** Miles has historically had a stable population (average growth 0.3% from 2001-2012). Miles was previously the seat of government for Murilla Shire, which included Wandoan.
- **Change:** From 2008, Miles saw an influx of non-resident workers (NRWs) in town. While the resident population decreased, the influx of workers equated to a population growth rate of 17% in a single year, well above the 'boom town' threshold (*boom* = 5-15% *p.a.*). In 2012/13, the resident population increased rapidly (6%) and has continued to increase although by 2014/15 growth had slowed back to around 1% per annum. The effects of population change have been largely determined by the NRWs in town. In 2013, total, or FTE (that is residents plus NRWs) population growth reached another high at 12.5% with 1 NRW for every 4 Miles residents. These figures do not include the many NRWs in camps outside town. In 2015, resident population levelled off, and NRWs in the town and region decreased number decreased more than projected.
- **Perceived change:** "Fluorescent work shirts". Most of the people interviewed thought resident population around 2,500 in 2013, one interviewee noted that at that time "9 out of 10 people on the street are strangers". Since construction ended, NRWs have left and there are empty houses.
- **Expectations:** Interviewees expected that population would slowly increase. Closing the NRW camps and moving CSG workers into town should bring a range of benefits.
- **Conclusion:** The rapid increases and decreases in NRWs has had significant impact on the town's population and social dynamics.
- **Implications for next project/stage:** Interviewees expectations for a gentle population increase differ from the WDRC projections of a district population increase to almost 5,500 by 2020. Other socio-economic indicators suggest high level of uncertainty over forecasted general and NRW population.
- **Community recommendations:** Opinion among those interviewed is divided on whether it is best to locate camps near to or away from the town. Further consultation with community and council members is advisable.
- **2017 Update:** Resident population growth is back to less than 1% but the number of NRWs is increasing again. Low rents and affordable house prices may encourage population growth.

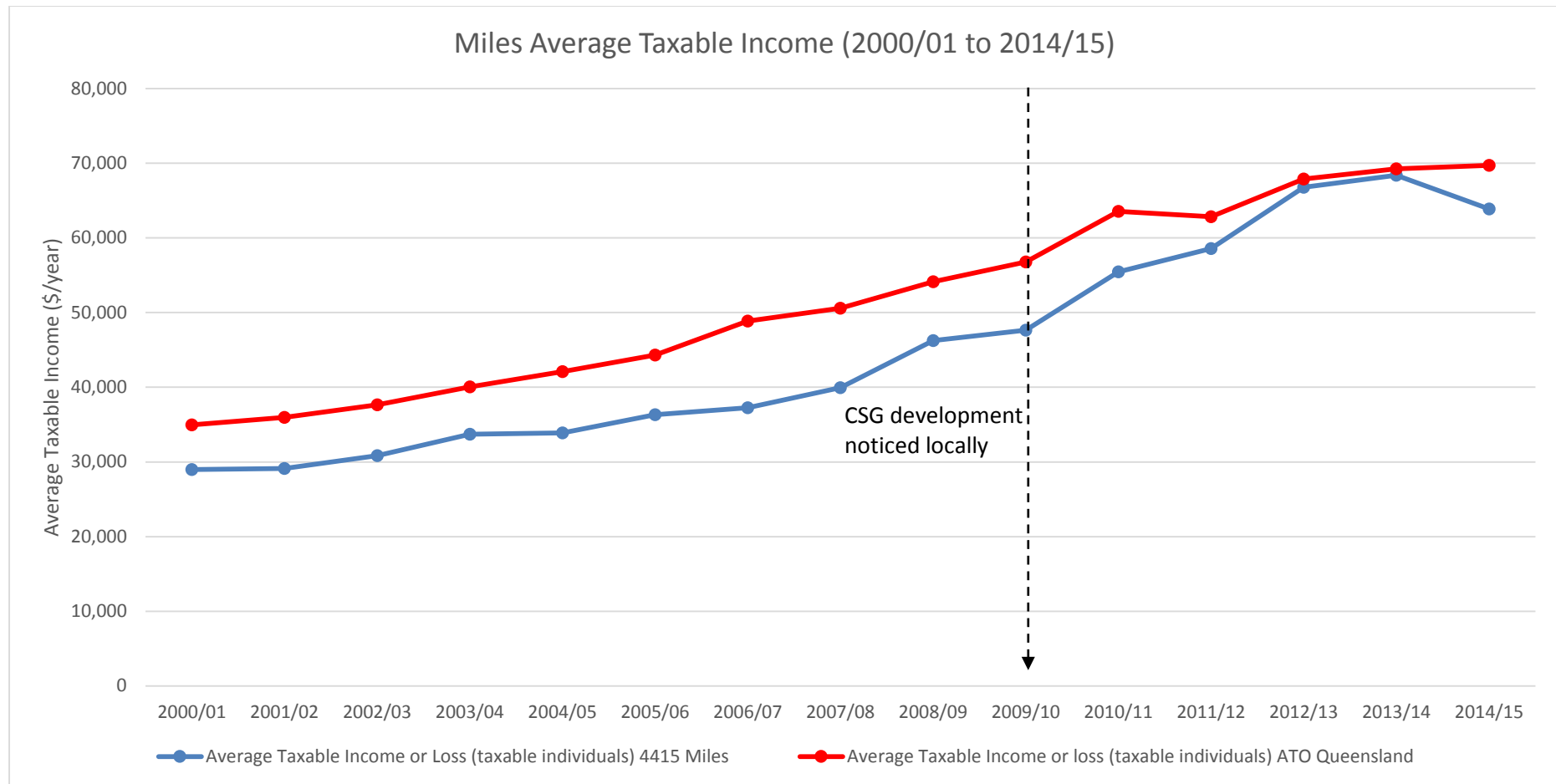


Data sources

- Jun2003-Jun2008 SLA from 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>
- Jun2009-Jun2010 from DEEWR file 'Unemployment salm_data_files_2008-2013'
- Jun2010-Jun2016 SA2 from QGSO Regional Database dataset 'Labour Force - Small Area (Qtr Ended 31 Dec 2010 to Qtr Ended 30 Sep 2016) [Department of Employment, Small Area Labour Markets Australia] (ASGS 2016)', <http://www.qgso.qld.gov.au/products/tables/qld-regional-database/index.php>

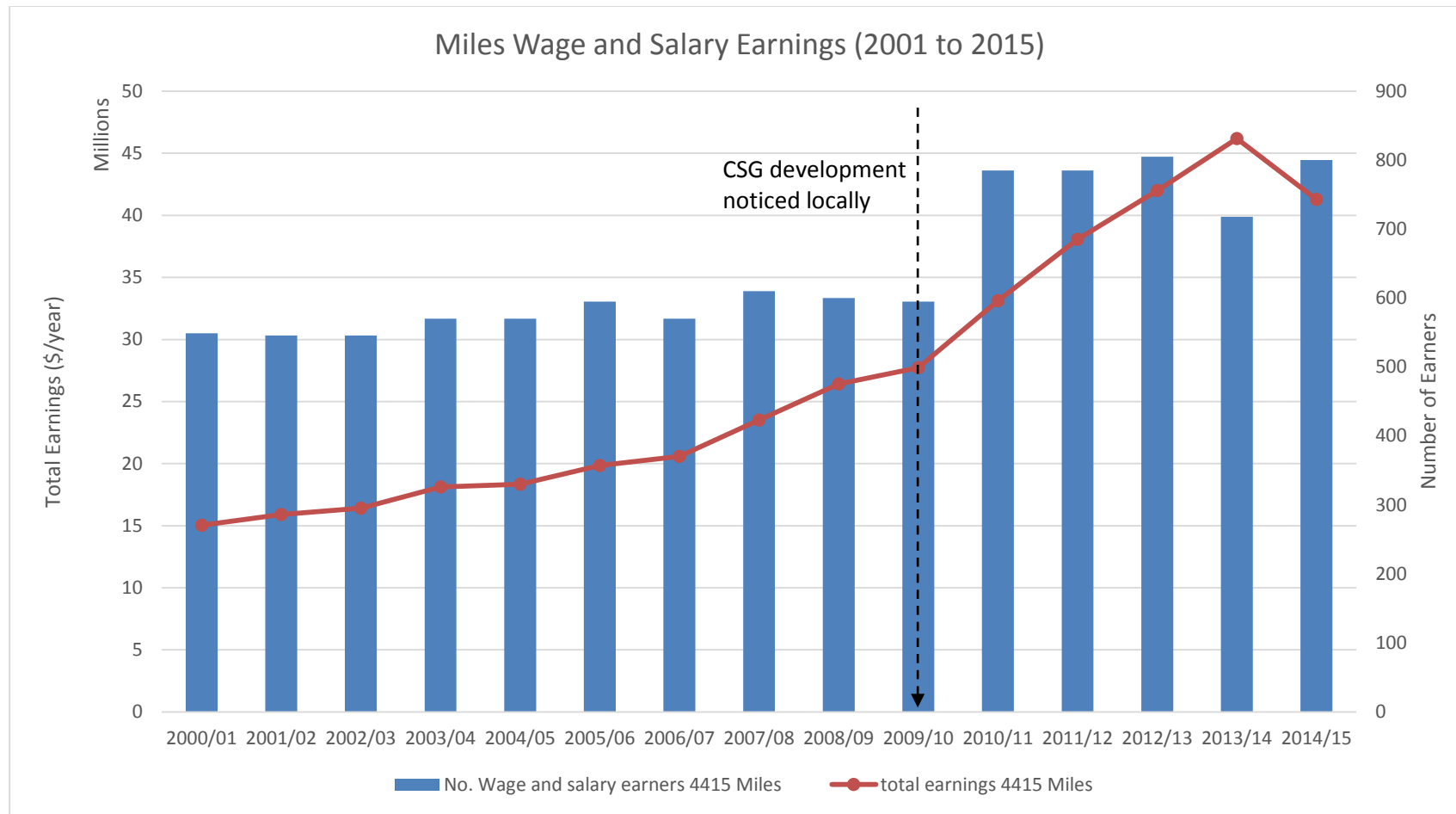
Data & Perceptions about unemployment

- **History and Trend:** Historically, Miles has a low unemployment rate - well below the Queensland average.
- **Change:** From a peak of 3.1% in 2009/10, unemployment fell below 1% in 2012 and 2013. (4% is considered full employment) Since then, it has risen again above 2%, but still remains low compared to the Qld rate.
- **Perceived change:** “Very low unemployment” made it difficult for local employers to keep staff or recruit new staff. Those interviewed say that, during the CSG construction period, youth did not have to leave town to find work. WDRC had to undertake workforce planning and local business capability studies due to a labour and skills shortage. Employment in the CSG sector may have offset unemployment in the agricultural sector due to drought.
- **Caveat:** Many jobs seen as ‘unskilled.’
- **Expectations:** Those interviewed believe unemployment will begin to rise as CSG activity appears to have slowed. Agriculture is doing well now though, so jobs demand is strong.
- **Conclusion:** With rising demands on a comparably low population, skills shortages were experienced. Youth stayed during the CSG construction period as jobs were available.
- **Implications for next project/stage:** Concern about rising unemployment.
- **Community recommendations:** Minimise the use of a FIFO workforce and employ local people. Make sure local procurement includes small, local operators.
- **2017 Update:** As interviewees anticipated, since 2013, unemployment has been rising. Unemployment remains low compared to the Queensland rate.



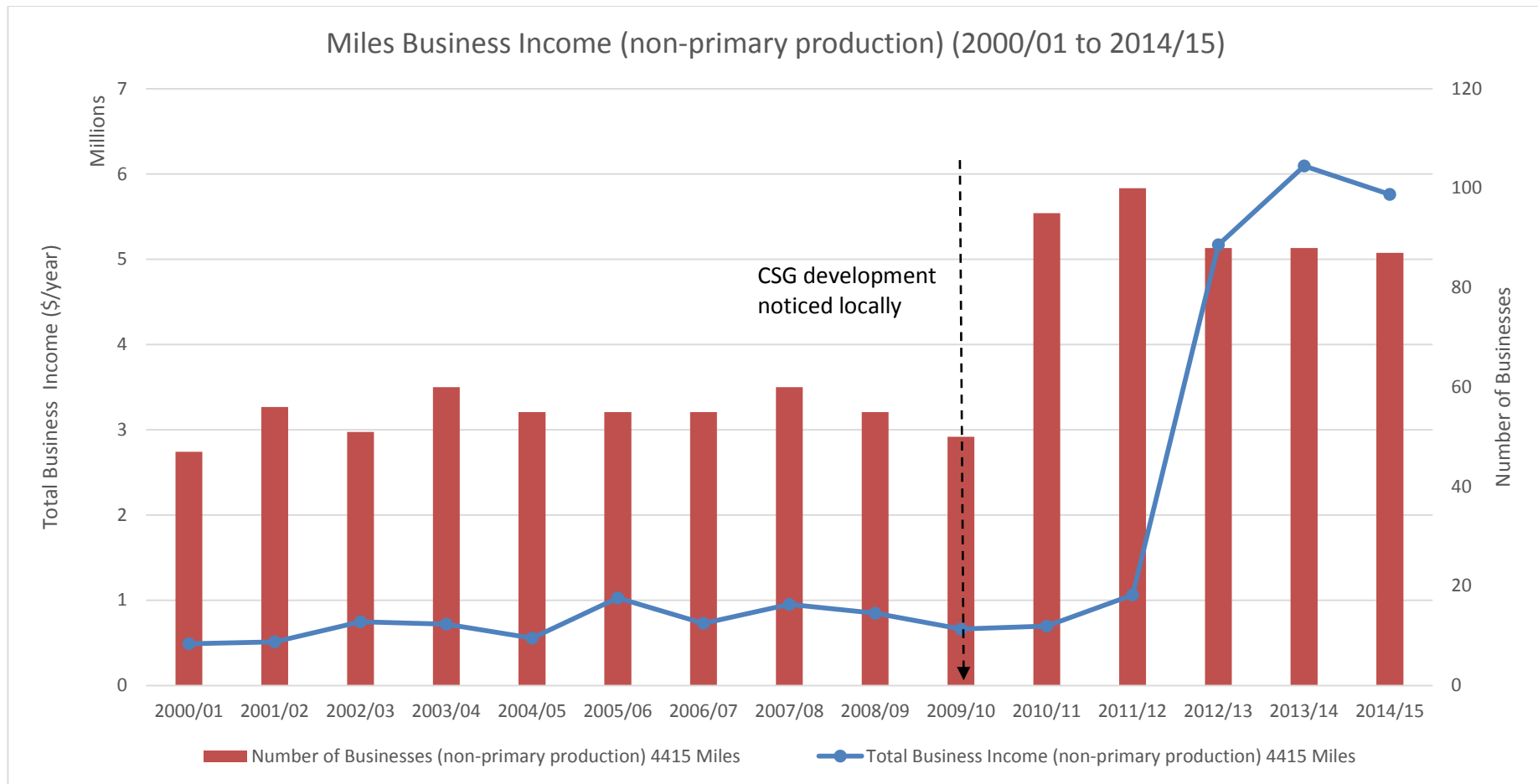
- Original data - No discounting applied
- Source: ATO 'Average taxable income of individuals, for selected Queensland postcodes, 2000–01 to 2014–15 income years' Australian Taxation Office, Research and Statistics (<https://www.ato.gov.au/>)
- All statistics for 'Taxable individuals only' were sourced from the relevant years' Taxation statistics publication, and therefore include individual income tax returns processed by 31 October of the year after the end of the income year. For example, the 2014–15 statistics include data up to 31 October 2016.

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- Original data - No discounting applied
- Sources: Australian Taxation Office, Research and Statistics (<https://www.ato.gov.au/>)

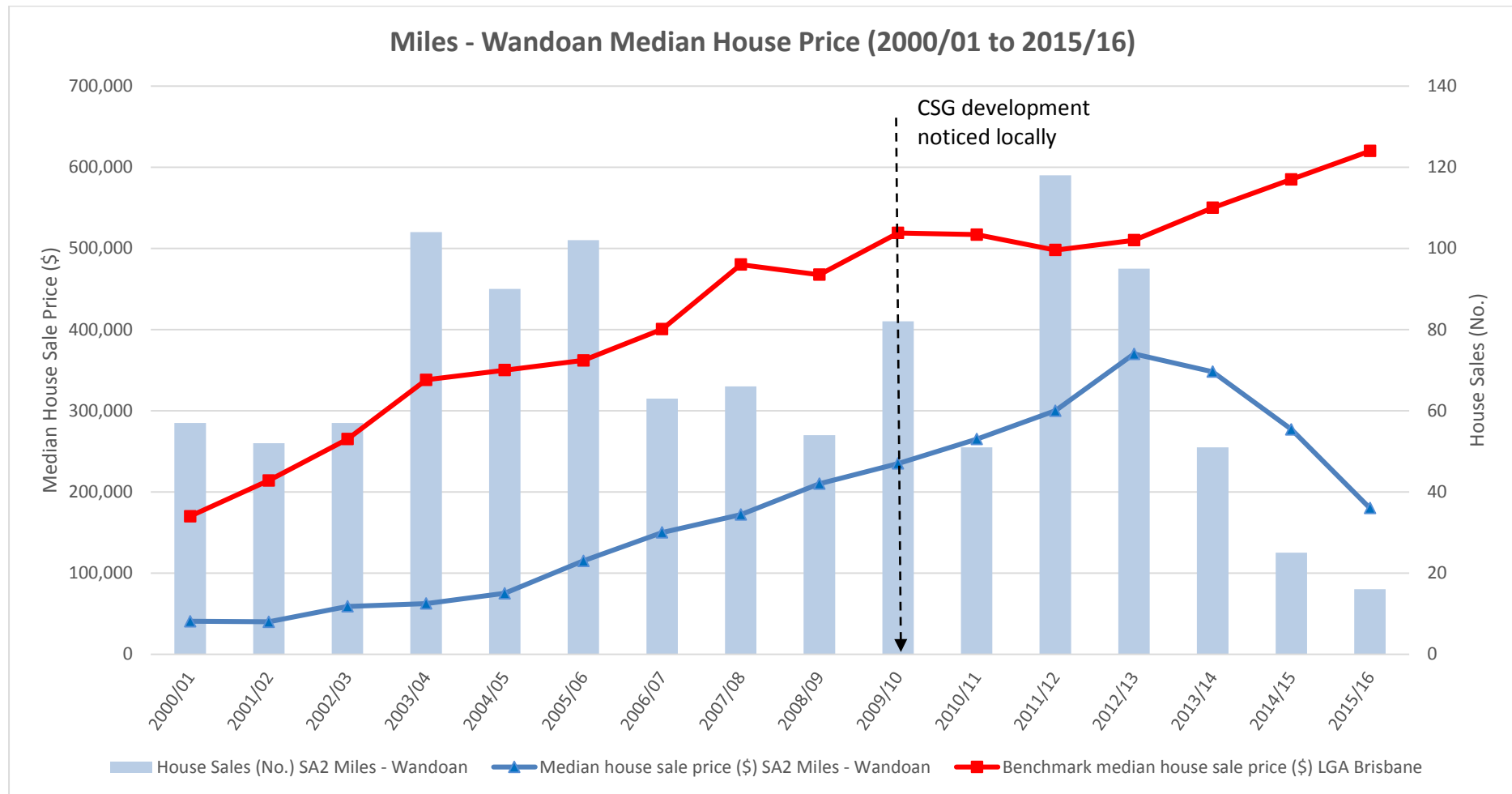
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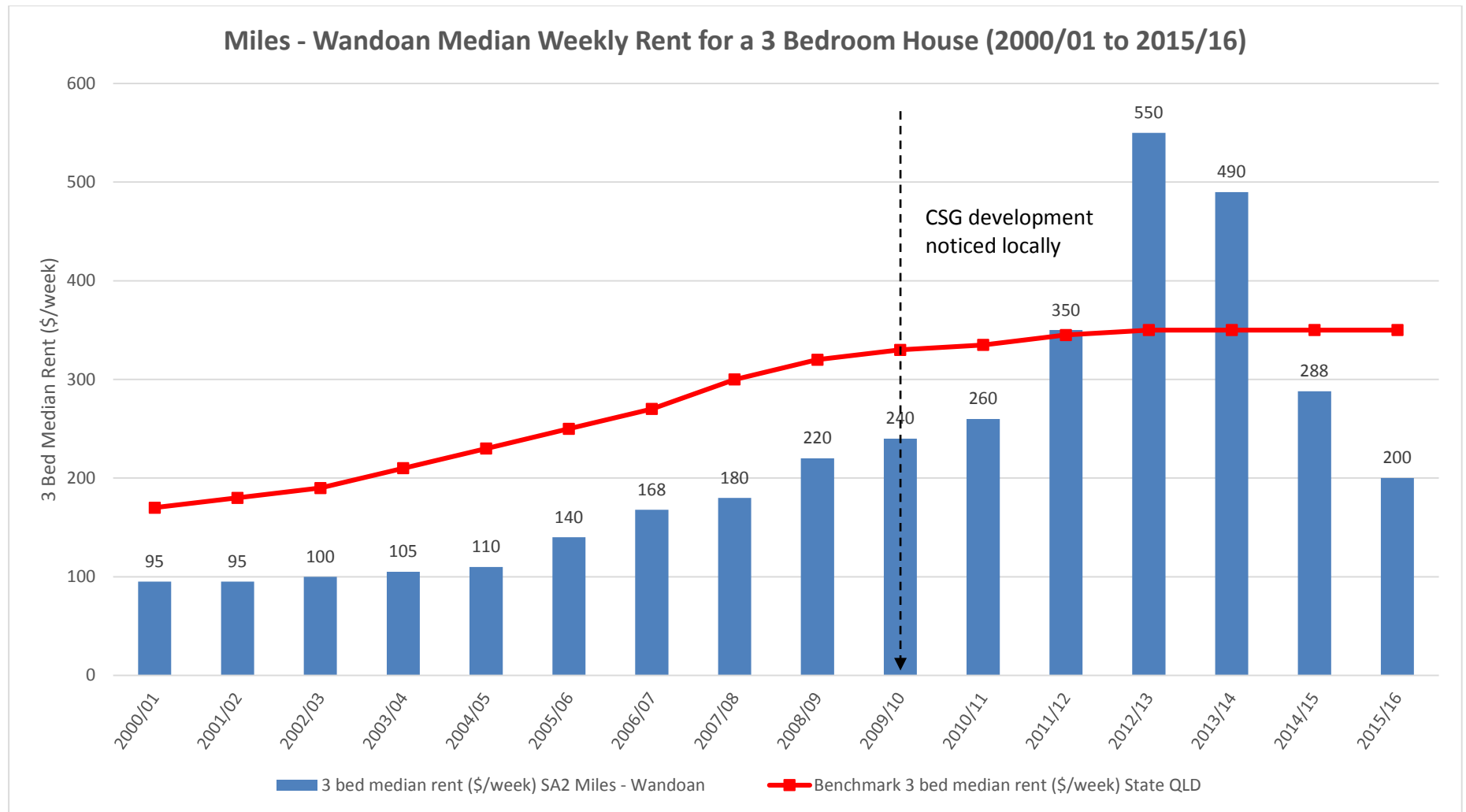
Data & Perceptions about incomes

- **History and Trend:** Personal income in Miles is consistently below the Queensland average. Average incomes fell further below the Qld average from 2004-5 to 2009-10, most likely associated with prolonged drought. Businesses (non-primary production) in the Miles postcode had a steady combined income of between \$500,000- \$1M annually from 2001-2012.
- **Change:** Average personal income increased from 2010/11, and was close to the Qld average in 2012-13 and 2013-14, significantly in the 2012-13 financial year. Business income for the town as a whole increased five-fold in a single year (\$1M in 2011-12 to over \$5M in 2012-13) and then up to over \$6M in 2013-14. The number of businesses doubled from around 50 in 2009-10 to 100 in 2011-12. In 2014-15 business incomes have decreased slightly (5.5%) while the number of business remained stable.
- **Perceived change:** “Wages have boomed in last 5 years”. “Now a more formal way of doing business”. “Some small businesses have closed”. Some local businesses have obtained CSG contracts; however, most local businesses were seen by those interviewed as “not benefiting”.
- **Expectations:** Local content spending seen to be in Chinchilla and Toowoomba (and Brisbane) and not in Miles.
- **Conclusion:** While data shows that total income for local businesses (and average personal incomes) did increase substantially, people thought that most local businesses “did not benefit”.
- **Implications for next project/stage:** Expectations did not match reality. Focus on employing local people and using local businesses.
- **Community recommendations:** CSG companies should define “local content” clearly, so as not to unduly raise expectations.
- **2017 update:** Both personal and business income have decreased in 2014-5 data. Business incomes peaked in 2013-14 but declined in 2014-15. Average personal incomes approximated the Qld average in 2012-3 and 2013-14 but have dropped 6.6% in 2014-15. The total wage earnings has also dropped in 2014-15.



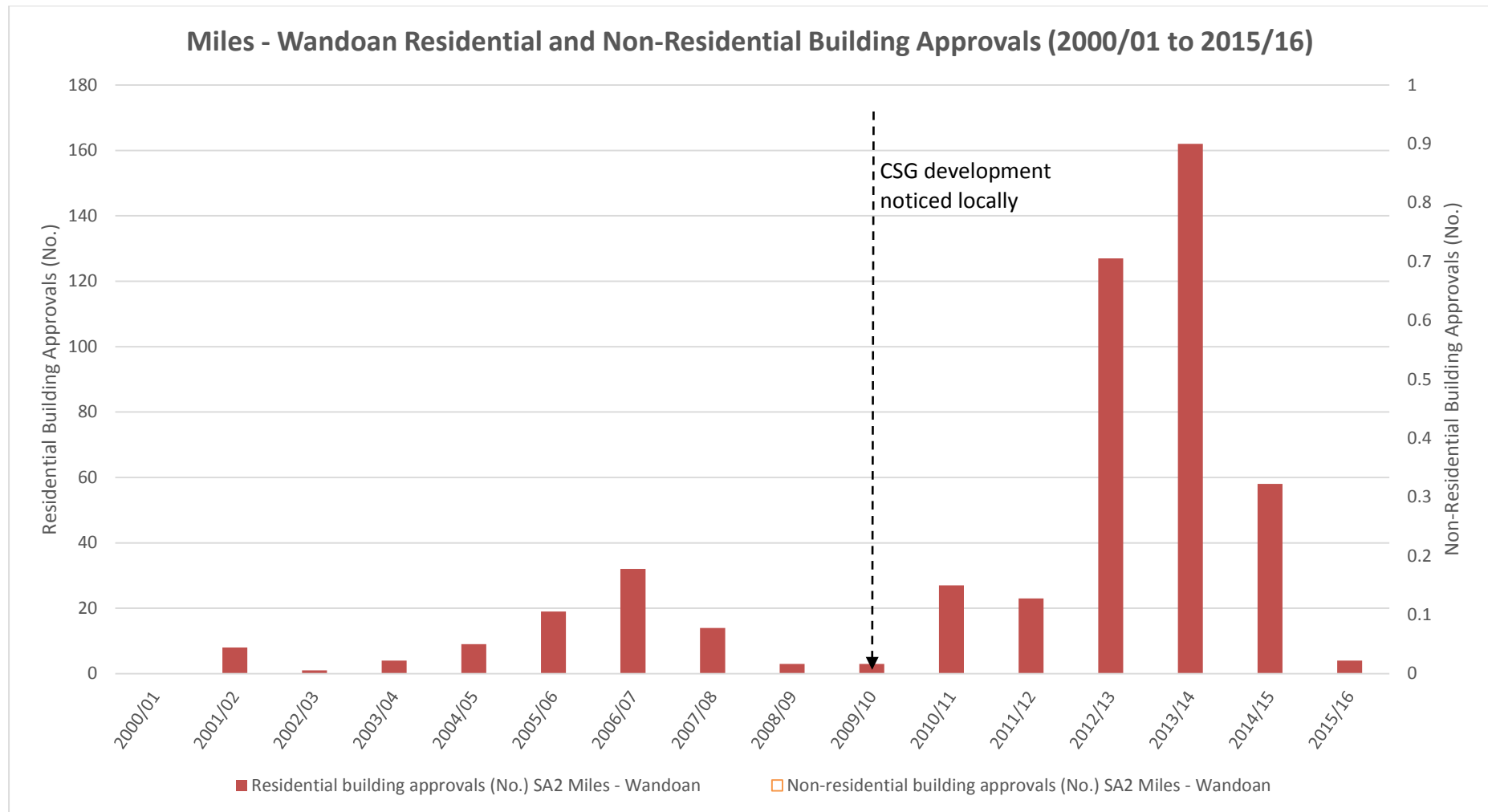
Data sources

- Median house sale price and hose sales from QGSO Regional Database dataset 'Residential land and dwelling sales (Year Ended 30 Sep 2000 to Year Ended 30 Jun 2016) [DNRM] (ASGS 2016)' <http://www.qgso.qld.gov.au/products/tables/qld-regional-database/index.php>



Data sources

- 3 Bed Median rent from QGSO Regional Database dataset 'Median rent (Year Ended 30 Sep 1990 to Year Ended 31 Dec 2016) [RTA] (ASGS 2011)', <http://www.qgso.qld.gov.au/products/tables/qld-regional-database/index.php>

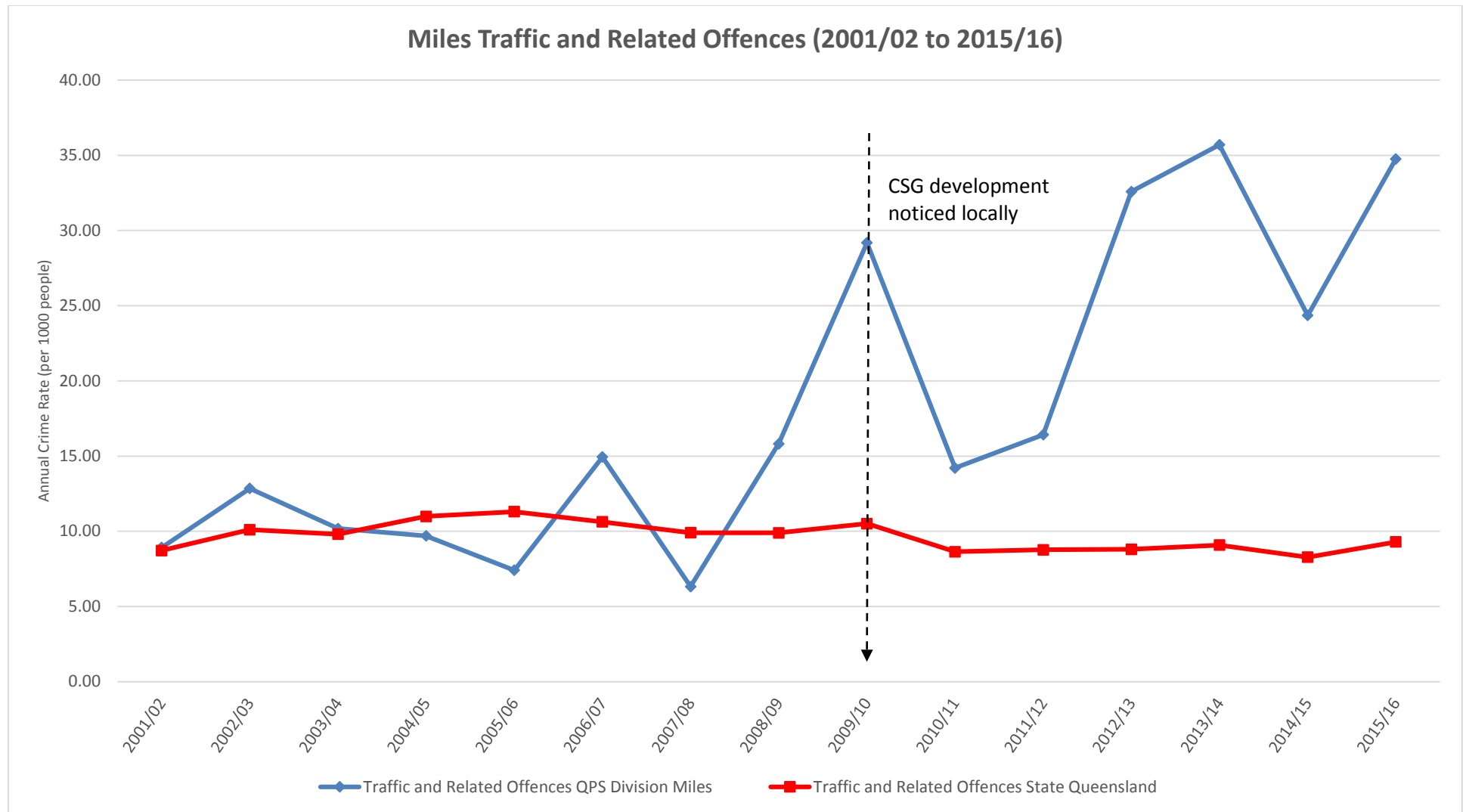


Data sources

- Residential and non-residential building approvals from QGSO Regional database dataset 'Building Approvals (Jul 2001 to Dec 2016) [ABS 8731.0] (ASGS 2016)', <http://www.qgso.qld.gov.au/products/tables/qld-regional-database/index.php>

Data & Perceptions about housing

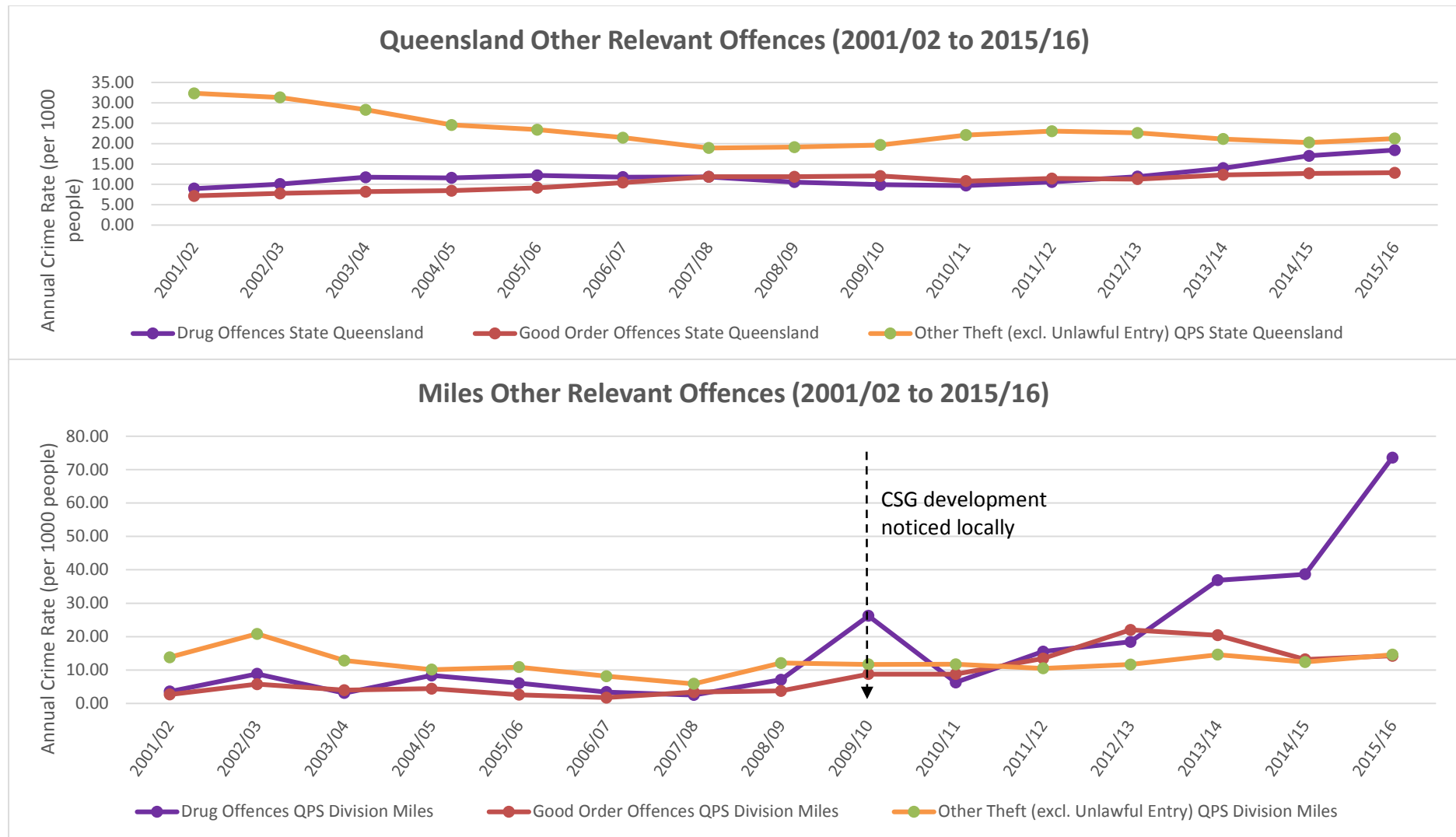
- **History and Trend:** Traditionally older, low cost housing available. House prices were increasing in line with Brisbane trends.
- **Change:** From 2011, house prices continued to increase strongly. Prices were well above the Qld median in 2012-13. Strong demand in 2011-2013 with a record 118 houses listed as sold in 2011/12. This prompted an historically unprecedented high number of residential building approvals. Since 2013, however, demands fell dramatically, and in 2016, only 16 houses were sold. Correspondingly, sale prices peaked in 2012/13 and since then decreased sharply by more than 50%; returning in 2015/16 to 2007/08 prices. Rents increased steadily until 2011/12 to the Queensland average, but rose sharply in 2012/13 to well above the Qld median. Since this peak, rents fell by over 60% within three years to pre-CSG 'boom' levels and well below the Qld average.
- **Perceived change:** CSG development caused prices to increase significantly, seen to be driven by "southern speculators", and "ridiculous prices". "Severe lack" of affordable housing "caused lower socioeconomic families to leave town". Housing Trust seen as "too slow" to respond effectively.
- **Expectations:** House sale prices will remain low. Bank loan defaults mean houses are selling for lower than market prices, that will continue to keep the price low. Rents may pick up. Expect that bringing the workers out of camps and into housing in town will help lift and stabilise prices.
- **Conclusion:** Housing impacts were significant. Responses to housing impacts were too slow, with building approvals peaking near the end of the construction phase. The resulting oversupply of houses, with very low rents, has been associated by local people with other social problems.
- **Implications for next project/stage:** Manage housing supply and demand. Do not underestimate private sector and market influences- i.e. triggered a property investment 'boom'. Need to manage expectations about the duration of the 'boom'.
- **Community recommendations:** Ratio of investors to local buyers would be "good indicator of housing impacts" because investors "willing to pay higher prices" causing externally driven, upward pressure on prices.
- **2017 update:** House sales and prices have fallen significantly, with rents decreasing to well below pre-CSG levels.



Data sources

- Crime data rates (per month per 100,000 people) obtained by Queensland Police Service (QPS) Division and Queensland State, <https://www.police.qld.gov.au/online/data/>
- Data was adjusted to be presented as annual data per 1000 people

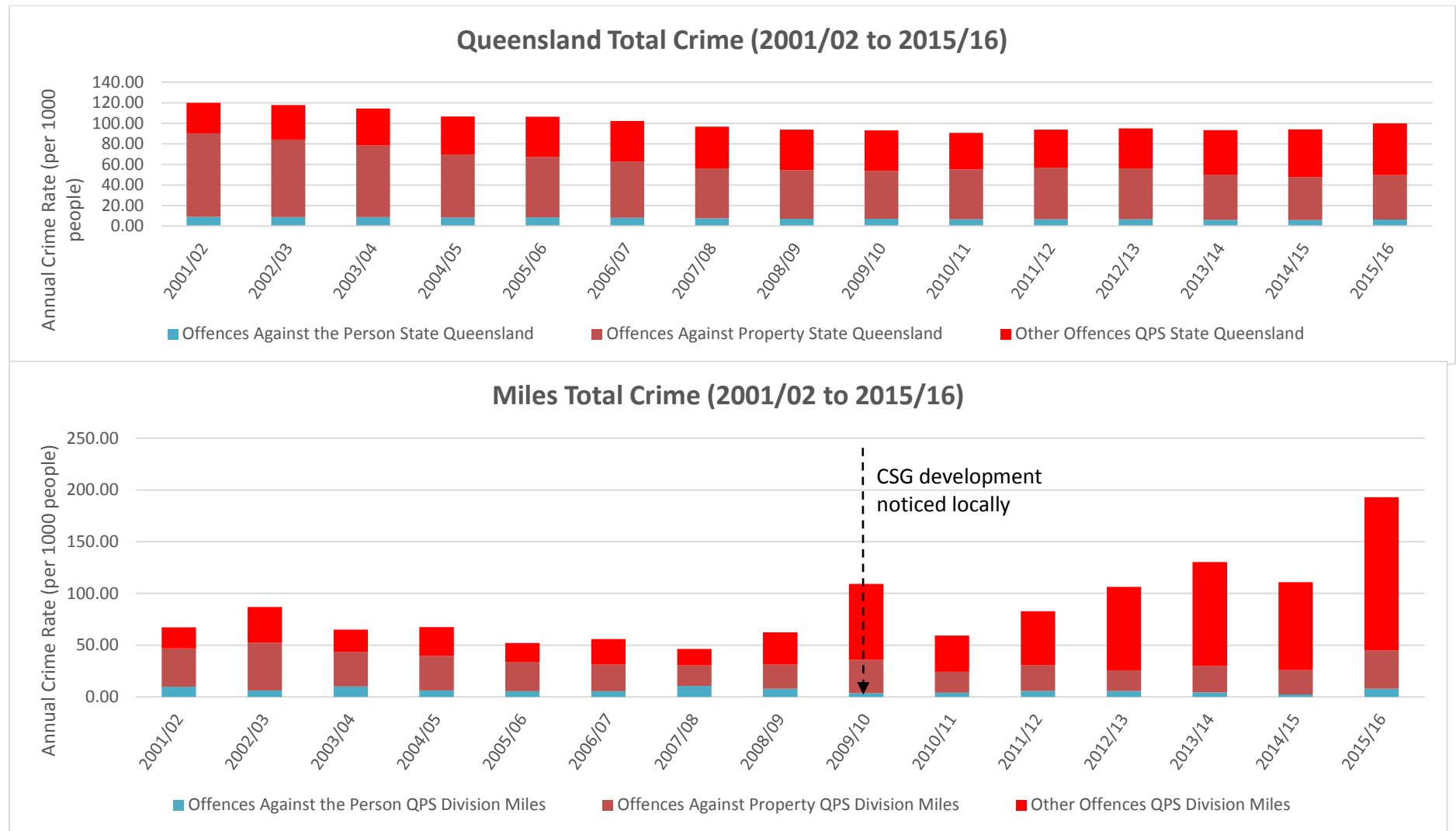
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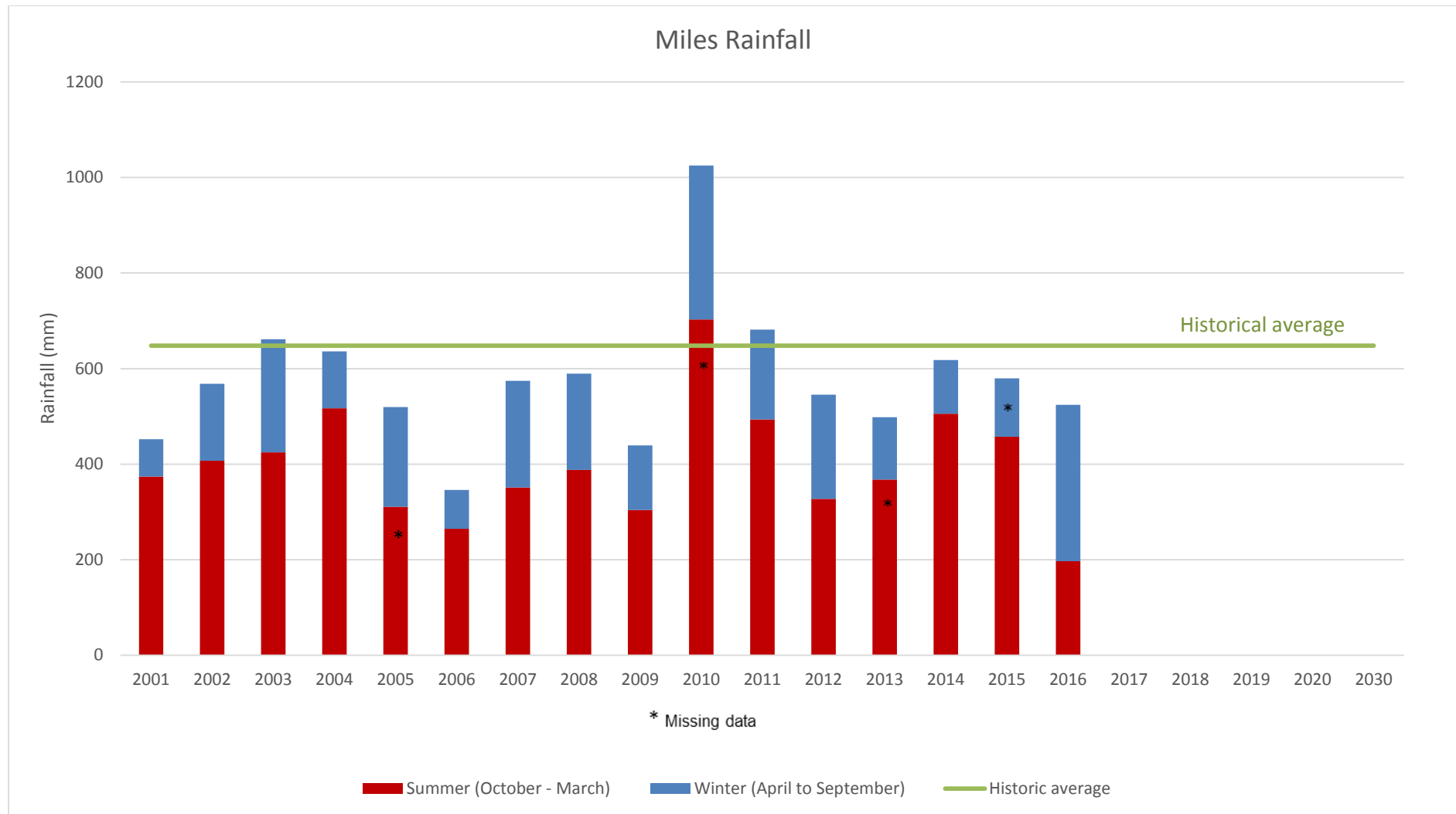
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Data & Perceptions about safety & wellbeing

- **History and Trend:** Miles used to be a “born here, live here, die here” agricultural town; it is now undergoing cultural change. Traditionally low crime rate and “old-style” policing methods.
- **Change:** In 2009-10, total offences spiked, driven mainly by increased traffic and drugs offences. Since then, an upward trajectory. Overall crime rate surpassed the rate for Queensland in 2012-13. A recent spike in 2015-16 with total offences at double the Queensland average. Good Order offences increased from 2009-10 until 2012-13, but have since declined. Both Good Order and Theft offences at or below state rate in 2015-16. Traffic offences fluctuate but remain high at triple the state rate in 2015-16. Notably, Drugs offences increased steadily since 2010-11 and sharply since 2014/15; to more than triple the Qld rate in 2015-16.
- **Perceived change:** Town “identity” has changed. Has been a “them & us” mentality. More vigilant policing methods driven by “expectations of CSG impacts”. During the construction phase, sub-contractors were seen by interviewees as “main offenders”, women and girls reported feeling less safe, longer queues at doctor reported and more road-side litter noticed. Loss of social capital possible with reportedly fewer volunteers available; linked to loss of perceived social cohesion. Residents expressed concerns about very low rents attracting ‘outsiders’. These new ‘outsiders’ seen to be causing disruption in schools and contributing to increased overall crime rates.
- **Expectations:** Concern over the long term social impacts of inflated and then deflated housing prices.
- **Conclusion:** Well-being has been impacted both positively and negatively. Better roads and less traffic now. Drugs offences and disruptive behaviour is a growing concern in the community.
- **Implications for next project/stage:** Link between mismanaged housing over-supply, falling rents, and increasing number of total offences needs to be investigated to address community concerns.
- **Community recommendations:** CSG companies should work with key local community groups from the beginning to “prevent or reduce impacts”.
- **2017 Update:** Certain offences certain crimes and offences. However, traffic and especially drug offences continue to increase to potentially problematic levels. Overall crime rate has increased to almost double the rate for Qld.

UQ Research Project: Cumulative socio-economic impacts of CSG development in Western Downs



Source: Bureau of Meteorology Clime Data online <http://www.bom.gov.au/climate/data/>

Miles Alignment of 'visions'

Category / Study -> ↓	Chamber	WDRC	CSIRO	UQ
Population	Doubling in size	2% av growth p.a. 2010-2031	---	---
Wellbeing	Attractive Main St. Volunteering Families	---	Community spirit, social fabric, respect	Greater certainty
Housing	Sustainable property market	Strong demand for rural lifestyle	Affordability	More housing
Employment	Maximising growth	---	Opportunities	'Have-nots' benefit too
Business	Tourism gateway, vibrant retail Resource sector service centre	Miles as logistics hub	Sustainability	Distribution of benefits from resources
Educ./Training	Youth entrepreneurs, families	---	---	Skilled immigration
Governance	Adaptable planning scheme Community champions improved services	---	Collaboration, handle rapid change	Reduced social divisions, improved services

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