Research Project:

Cumulative socioeconomic impacts of CSG Development in Queensland

DATA REPORT

INDICATORS OF CHANGE IN TOOWOOMBA AND DISTRICT COMMUNITY

Interviews completed in early 2016
Statistical data updated in April 2016

VERSION 9 – May 2016

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The Toowoomba CSG Development Story

Flow on effects related to coal seam gas development in Toowoomba are diffuse and mixed with other key drivers of change. Population seemed to change little, while total business income doubled during the CSG construction period.

Such changes have been characterised here with the help of expert knowledge from members of the Toowoomba community*– Chamber of Commerce, real estate agents, managers of hotels, motels and other local businesses, police, managers of employment agencies, and local and State government staff. These individuals were presented with statistical data on the following 'indicators' of social and economic trends to assess the data's accuracy from a local point of view and to enable us to gather further insight about interconnections between observed changes. These data and insights combine to form the 'Toowoomba CSG development story'.

1. Population
2. Unemployment
3. Income& Business income
4. Business income
5. Housing
6. Top offences recorded by police
7. Rainfall
8. Petrol prices

Those interviewed described Toowoomba as a conservative town with a strong and diverse economic base. Founded as an agricultural and government services centre, the town has developed food processing, manufacturing, transport, tourism and technology sectors.

Population in Toowoomba has been increasing slowly, and slow growth is expected to continue. Toowoomba is a popular retirement destination and has an increasing population of the aged. In Toowoomba, the presence of CSG non-resident workers (NRWs) was said to be less than interviewees expected. Data shows that most of the NRWs were based out of town. 2015 official predictions show the number of NRWs for the Toowoomba region remaining stable. In reality, the number of NRWs in town more than halved.

Unemployment in Toowoomba region is below the Queensland rate, although unemployment rates vary markedly between suburbs. Skills shortages were experienced in some sectors, particularly hospitality and mechanics. Average personal incomes have remained below the Queensland average and showed no significant increase. Total business income for Toowoomba more than doubled in the 2012-2013 financial year.

Housing in Toowoomba is still viewed by those we interviewed as affordable. Median house prices increased by more than $50,000 in 2014 after a period of relative stability. Rents for a 3-bedroom home have been increasing steadily. That possibly reflects steady demand from the government services sector, particularly education and health services. Accommodation providers have largely serviced business travellers and short term stays. There was a shortage of budget accommodation for backpackers and budget travellers during the CSG construction phase.

Toowoomba is perceived by our interviewees to be a safe place to live. This view is supported by the data, which show that Toowoomba's overall crime rate is about 15% below the Queensland benchmark. However, for some crime categories, rates are higher. Good Order offences are higher than the Queensland rates. Drug offences are also higher and are increasing rapidly although data shows that increasing drugs offences is a state-wide trend. The number of offences can reflect police effort, and so recent increases in these offences may be due to concentrated police effort toward these issues.

This booklet provides detail on the aspects of the 'Toowoomba story' based on the range of priority indicators that we tracked. We would like to thank members of the Toowoomba 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

* Indicator trend data from public sources and interviews with 10 key stakeholders in each community identified as having specific knowledge - mayors, school principals, real estate agents, police, community group leaders, hotel owners, chamber of commerce leaders and others in prominent roles. Charts of historical trends in indicators were used to prompt an explanation of what they perceived happened - cause and effect - plus concerns, expectations and recommendations.

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 Toowoomba.

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, Chair in Social Performance, Centre for Coal Seam Gas (CCSG) and Centre for Social Responsibility in Mining (CSRM).
- Dr Jo-Anne Everingham, Senior Research Scientist, CSRM.
- Dr Katherine Witt, Postdoctoral Research Fellow, CCSG.
- Ms Sheryllee Johnson, Research Technician, CCSG.
- Ms Humaira Malik, PhD candidate, Sustainable Minerals Institute.
- Professor David Brereton, Associate Director, Sustainable Minerals Institute.
- Dr Vikki Uhlmann, Research Manager, CSRM (2013 -2014).
- Ms Kylie May, Research Analyst, CSRM (2013 – 2014).
- Ms Sarah Worthing, Research Analyst, CSRM (2014).
- Ms Kylie Bourne, Research Assistant, CSRM (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).

Timeframe: The data collection for the project has been occurring in 2013, 2014, and 2015, with updates planned for 2016 and 2017.

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.

Reports: Project outcomes, recommendations, and reports have been released periodically 2013-2015, and they will continue to be released in 2016-2018 (*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, Associate Professor Will Rifkin, Centre for Social Responsibility in Mining, SMI, The University Of Queensland, Brisbane, QLD 4072 , Ph: 0401 701 217,
Email: w.rifkin@uq.edu.au, www.csrm.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 TOOWOOMBA AND DISTRICT

DEMOGRAPHICS

1. Population

EMPLOYMENT, BUSINESS & INCOME

2. Unemployment
3. Income

HOUSING

4. House prices
5. Weekly rents

WELLBEING

6. Traffic offences
7. Other offences
8. Total offences

EXOGENOUS FACTORS

9. Rainfall
10. Petrol prices

CSG ACTIVITY

Graph/map of CSG development

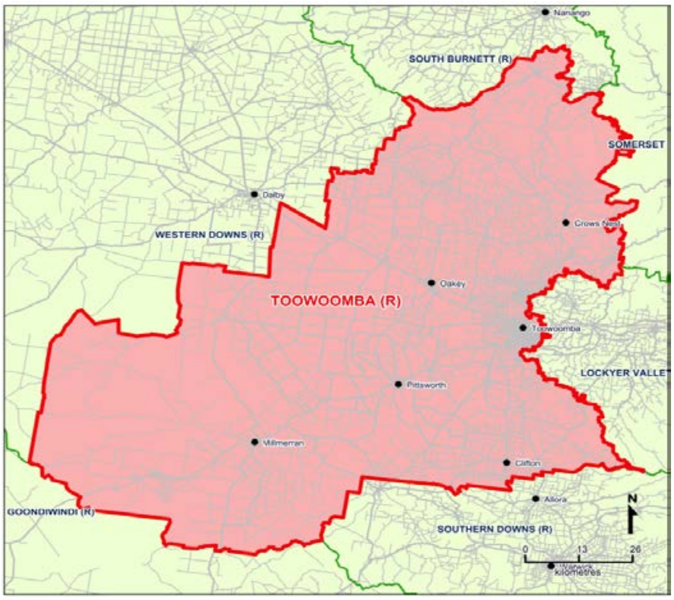
IMPACTS ON INDIGENOUS MEMBERS OF THE COMMUNITY

Efforts are ongoing to develop key indicators that are agreed as appropriate for measuring impacts on Indigenous residents and businesses. 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	Indicator-related research being conducted
	• Resilience; Community aspirations (CSIRO)
	• Public health – PhD study (UQ)
	• Demographic & economic trends (CSIRO & UQ)
	• Business (women in business) – PhD study (UQ)
	• Water Chemistry Atlas (UQ)
	• Agriculture & co-existence (UQ & CSIRO)
	• Environmental impacts – biodiversity (CSIRO)

The areas for which data for this booklet has been gathered

Local Government Area (LGA), 2011 – Toowoomba (R) (ASGC Code 36910)

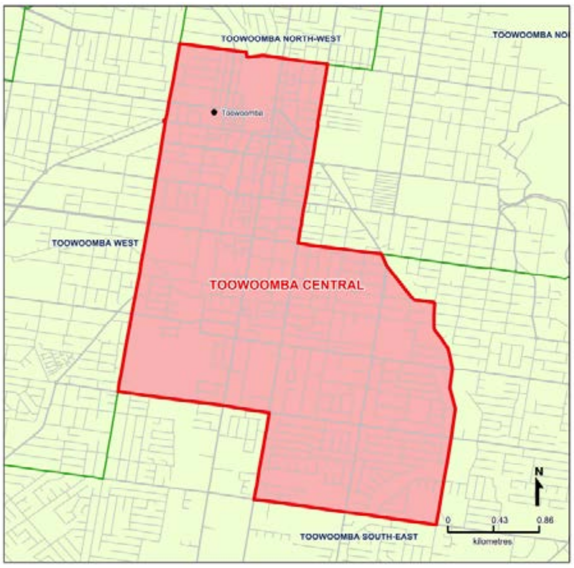


Source: http://www.qgso.qld.gov.au/products/maps/qld-lga-asgc-2011/qld-lga-asgc-2011-toowoomba.pdf

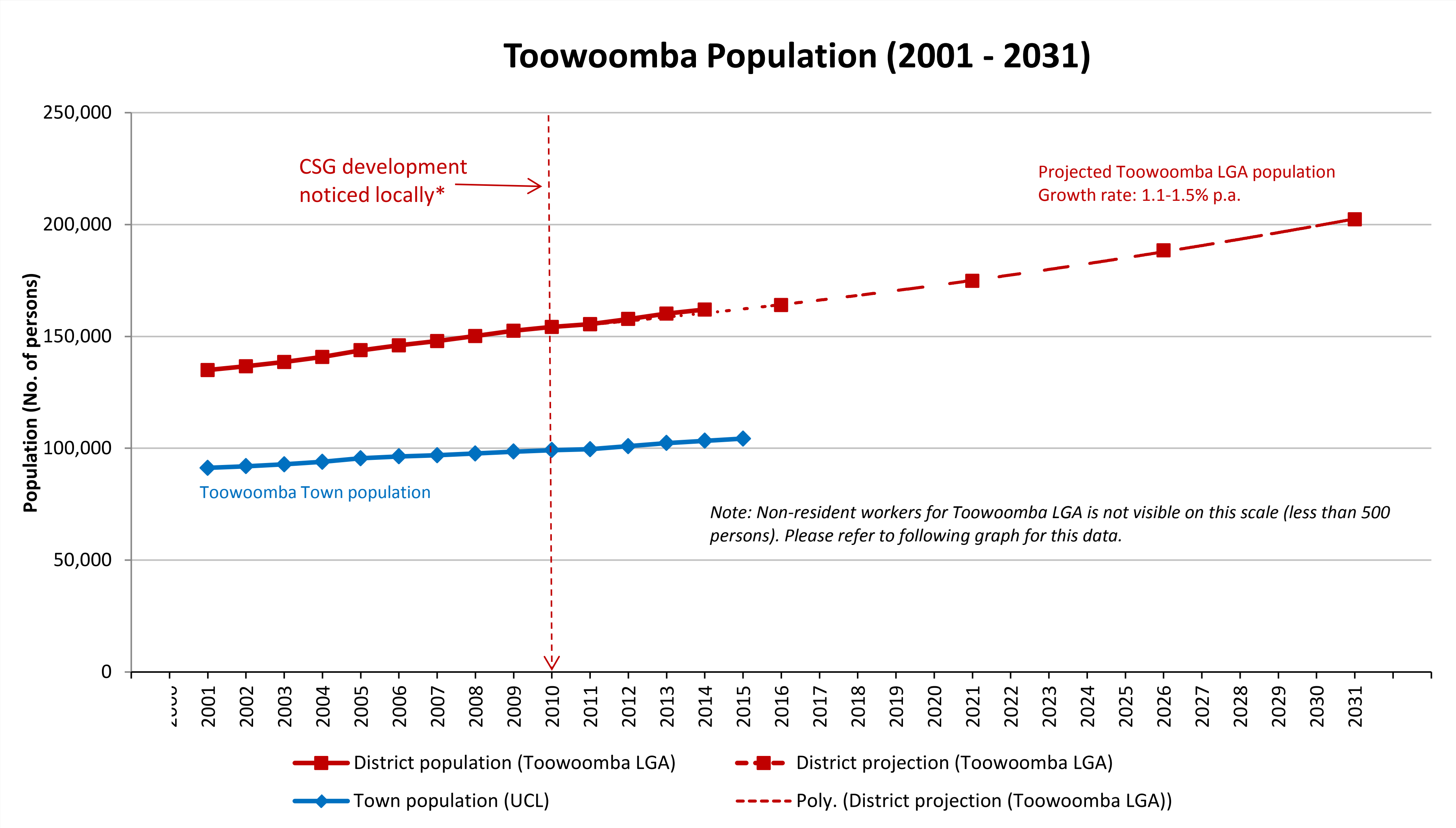
Toowoomba postcode boundary 4350

Source: https://www.google.com.au/maps/place/Queensland+4350/@-27.5575364,151.7335848,11z/data=!3m1!4b1!4m2!3m1!1s0x6b96435a37012f5b:0x1c00eef4d3090e30

Toowoomba Central SA2 and SLA



Source: http://www.qgso.qld.gov.au/products/maps/qld-sla-asgc-2011/qld-sla-asgc-2011-toowoomba-central.pdf



Data sources

- Historic resident population data: Queensland Government Statistician's Office (QGSO), www.qgso.qld.gov.au, QRSIS database (based on ABS 3218.0, Regional Population Growth, Australia, 2013-2014)
- LGA resident population projection: Queensland Government Population Projections by LGA, 2013 Edition, https://data.qld.gov.au/dataset/projected-population-for-queensland
- Non-resident workers: QGSO Surat Basin Population Reports (2008, 2010-2014), http://www.qgso.qld.gov.au/products/reports/surat-basin-pop-report/index.php
- Non-resident projections: QGSO Surat Basin non-resident population projections, by local government area (LGA), 2015 to 2021, http://www.qgso.qld.gov.au/subjects/demography/population-projections/tables/surat-basin-non-resident-pop-proj-lga/index.php

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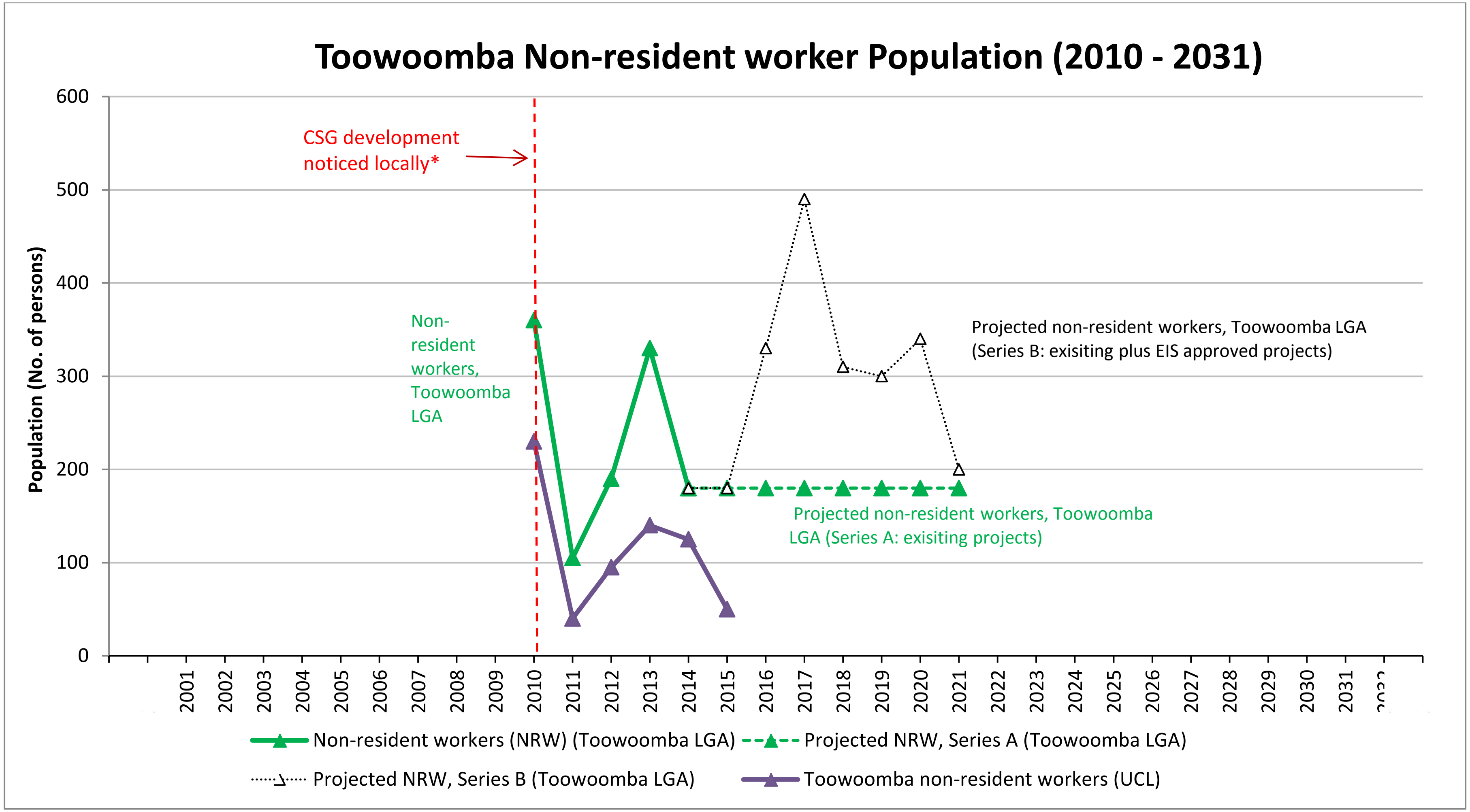

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- Non-resident projections: QGSO Surat Basin non-resident population projections, by local government area (LGA), 2015 to 2021, http://www.qgso.qld.gov.au/subjects/demography/population-projections/tables/surat-basin-non-resident-pop-proj-lga/index.php

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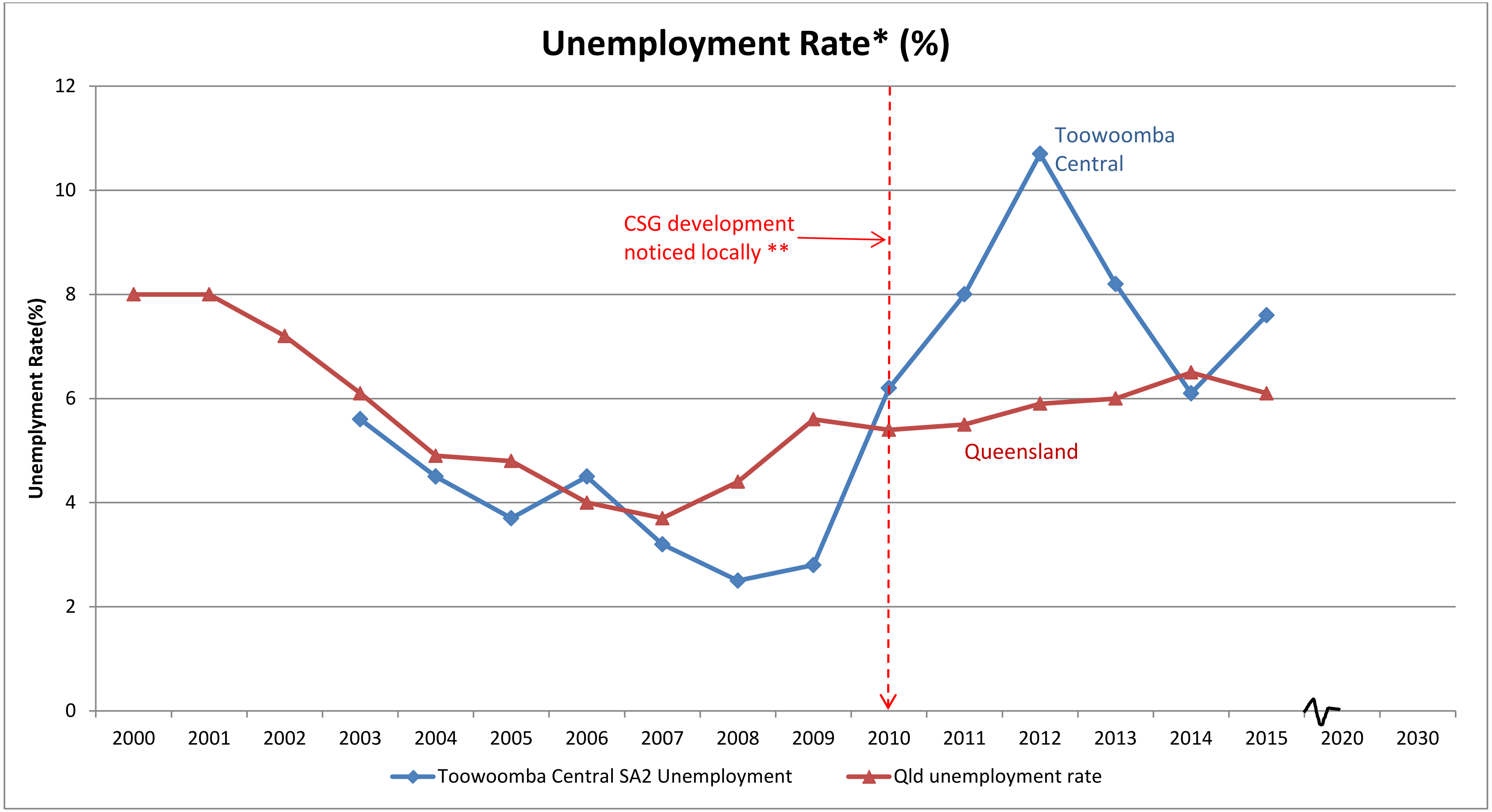
Data (2015) & Perceptions (2015) about population

- ***History and Trend*:** Toowoomba historically has a slowly increasing population. The greatest increases are in the 65-74 years age bracket (ABS 2013).
- ***Change*:** In recent years, population growth has been slightly greater than predicted. Many of the larger CSG contractors were based in Toowoomba. Professional and management staff were often recruited from elsewhere, interviewees reported. Mostly, these people moved to Toowoomba with their families, and so do not count as non-resident workers (NRWs).
- ***Perceived change*:** Most of those interviewed did not directly attribute population growth in Toowoomba to CSG development. Non-resident workers were noticed in town, mainly on shift change-overs, but they were described as “not a big deal”. Some interviewees noticed the in-migration of lower-income tenants as rents increased in CSG-affected towns to the west. “A fair proportion” of local residents worked as NRWs in the gasfields.
- ***Expectations*:** Toowoomba did not see the effects of NRWs in town, as interviewees expected**.** Those interviewed expected population growth to continue in response to a number of different policies and projects. Some desired a higher rate of population growth. Interviewees expected that the long-term, operational CSG workforce would choose to live in Toowoomba rather than further west.
- ***Conclusion*:** The effects of CSG development on the population of Toowoomba were not visible to all. The key stakeholders interviewed had expected a greater impact.
- ***Implications for next project/stage*:** Toowoomba is seen as a more desirable place to live for the permanent CSG workforce and their families, in the eyes of those interviewed.



Source: *The unemployment rate represents the number of persons unemployed as a percentage of the labour force, which includes all those persons over the age of 15 years who are employed plus all those who are unemployed but actively looking for work.

Smoothed data (data based on four quarter average) is not available prior to December quarter 2010.

Data is smoothed unemployment rates for December each year thereafter except for 2015, which is taken from June rates.

Years 2003 – 2008 retrieved from QGSO for SLA areas. Year 2009 retrieved from DEEWR for SLA areas.

Years 2010 – 2015 retrieved from SA2 & LGA areas from Department of Employment: *Small Area Labour Markets Australia,* http://docs.employment.gov.au/node/34691

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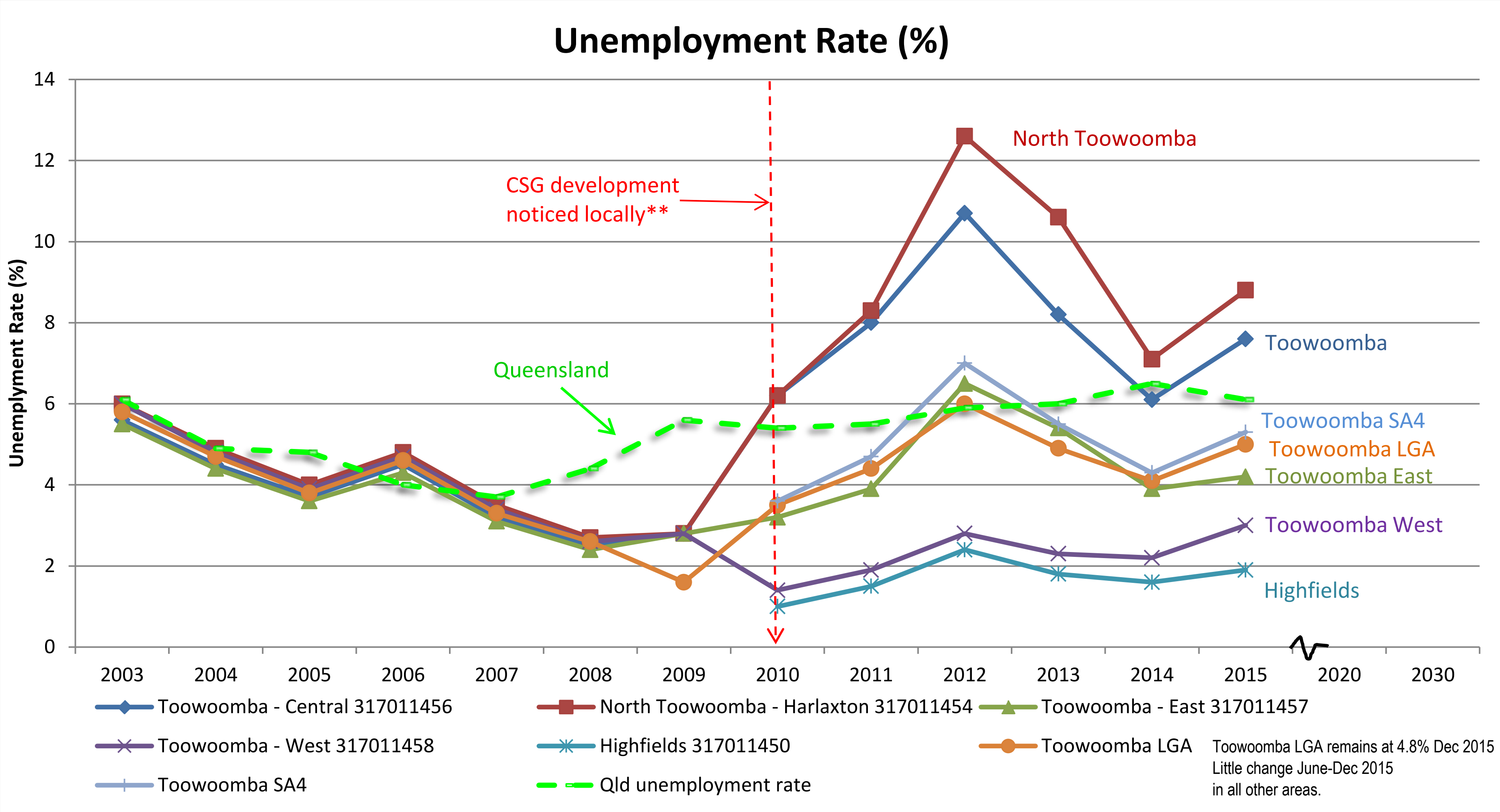

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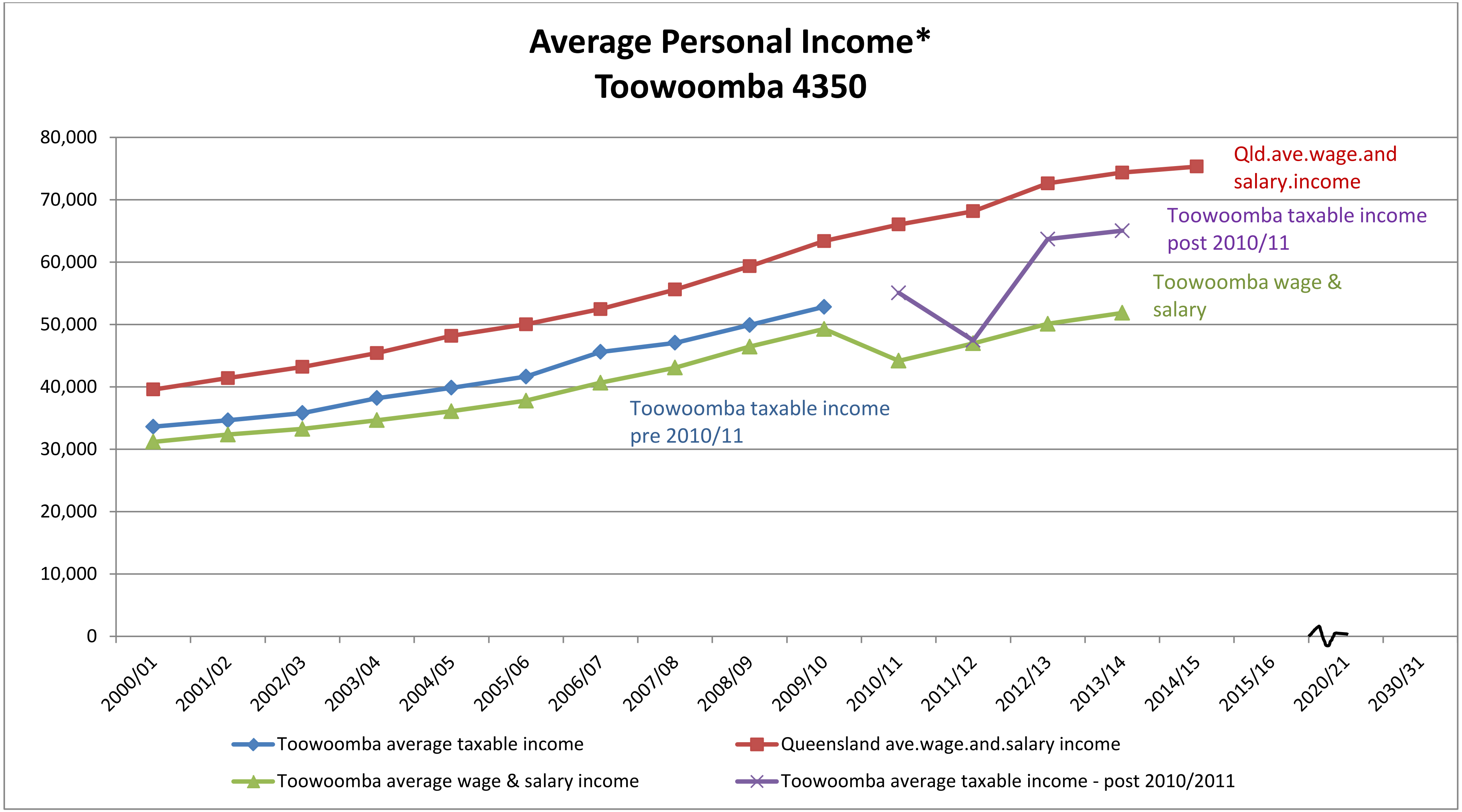
Data (2015) & Perceptions (2015) about employment

- ***History and Trend*:** Unemployment in Toowoomba LGA remained below the Queensland rate. Unemployment rates vary significantly between suburbs. Lowest in 2009 and highest in 2012.
- ***Change*:** Unemployment in the western suburbs and Highfields continued to decrease after 2009, when other suburbs' rates were increasing. Significant increase in apprenticeships.
- ***Perceived change:*** Skills shortages were noticed, particularly in hospitality and mechanics. Such shortages were attributed to people "going off to work in the gas". Prolonged drought in the region meant that there was low demand for jobs in agriculture. Many agricultural trade workers were reported to have found jobs in CSG and related construction. Many opportunities for training. More employment agencies opened.
- ***Expectations*:** Unemployment is expected to rise in some (mostly unskilled) sectors only. CSG-related skills can be used to gain employment in agriculture. Opportunities for construction workers exist in Toowoomba with residential and commercial development projects and the building of the second range crossing (from the Brisbane/Lockyer Valley highway up the escarpment). CSG professionals are expected to move away.
- ***Conclusion*:** Unemployment remained low in the suburbs closest to CSG development. Even with higher unemployment figures, skills shortages were experienced in the sectors needed by CSG development during the construction phase.
- ***Implications for next project/stage*:** With an available, skilled workforce, Toowoomba is seen by those interviewed as "well-poised" for the next big project.



*Original data - No discounting applied
*Average taxable incomes reported by ATO until 2009 excluded losses. Averages from 2010 include all taxable incomes including incomes of 0 and losses.
Sources: Australian Taxation Office, Research and Statistics (https://www.ato.gov.au/)
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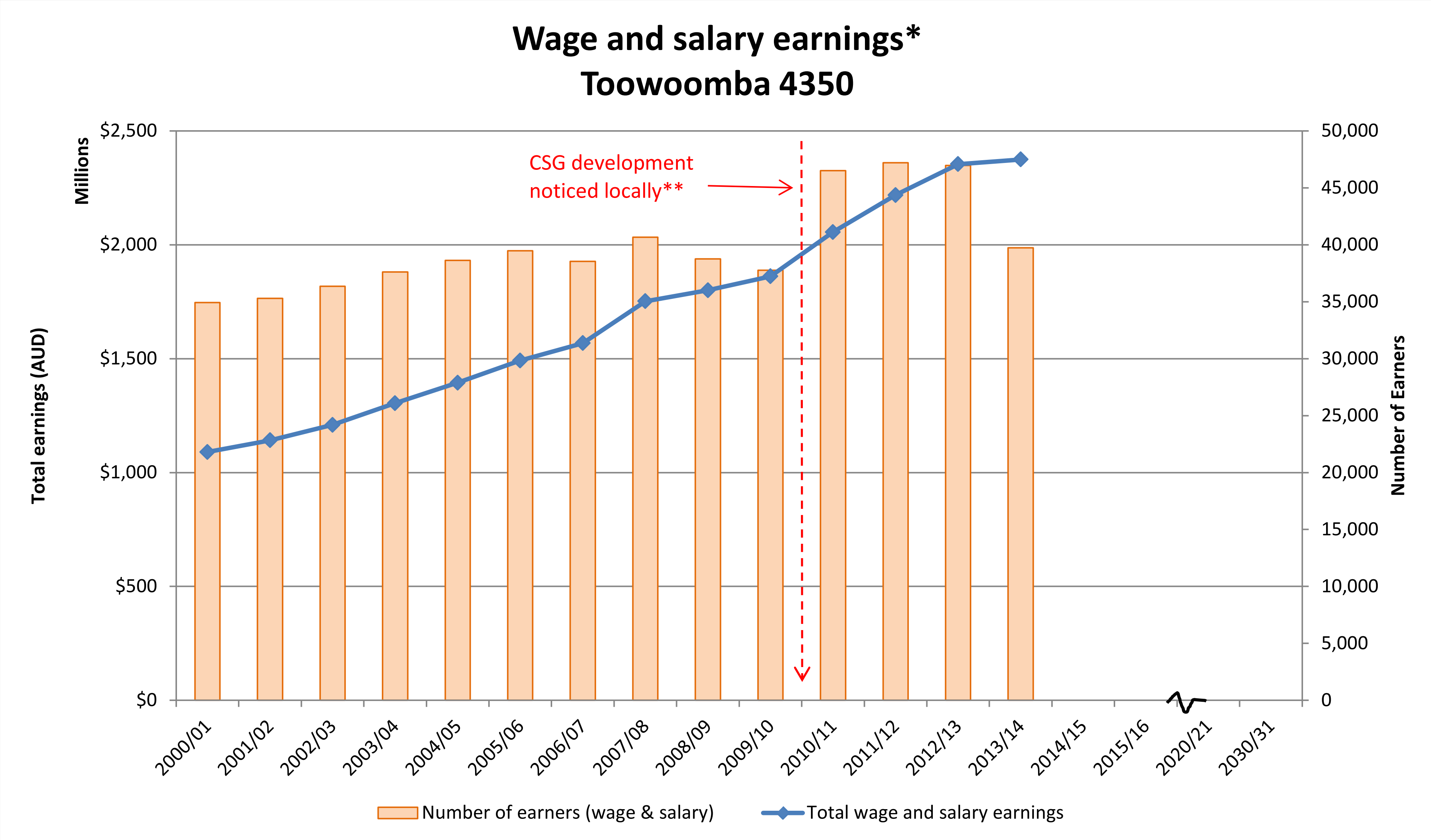

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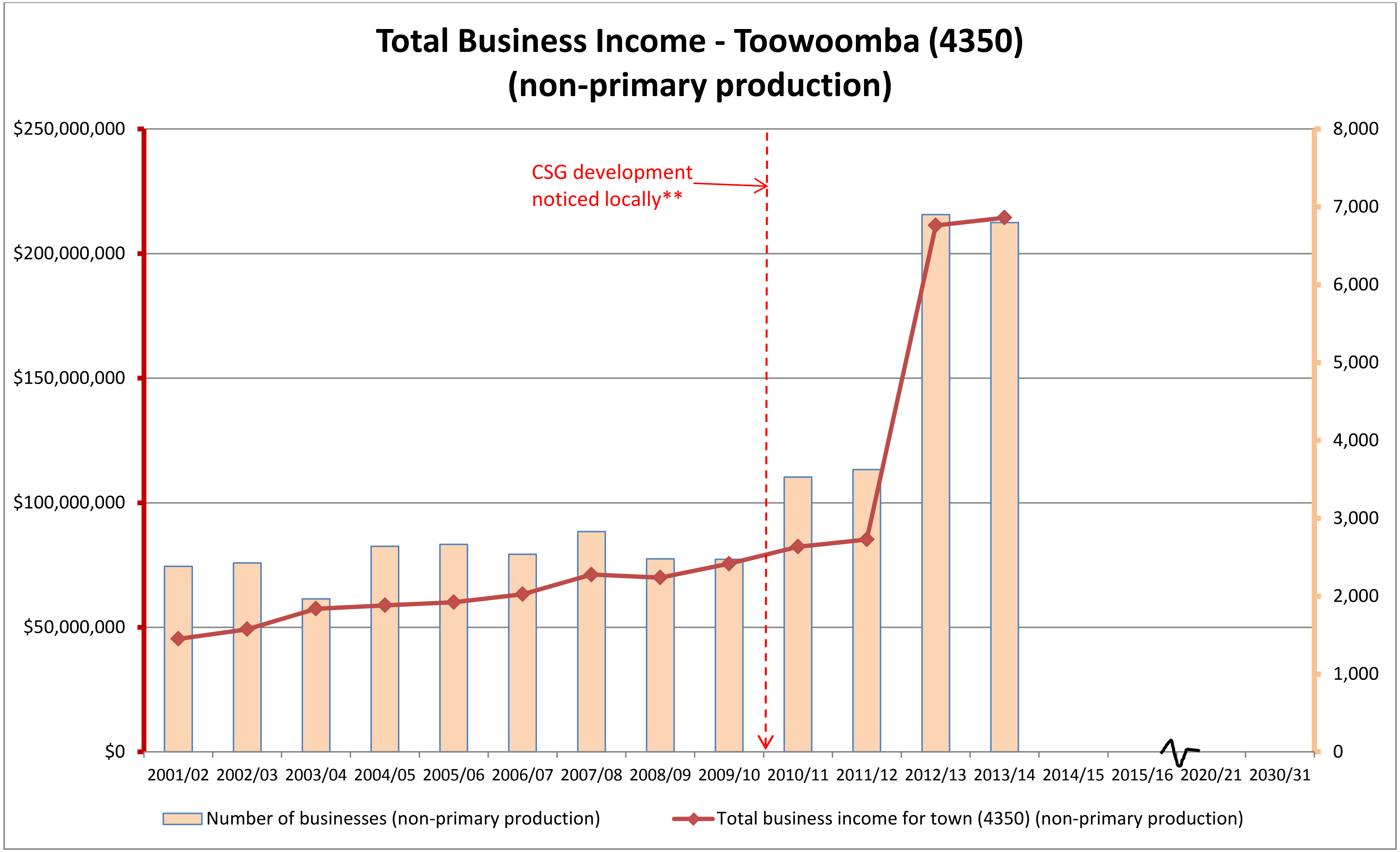

*Original data - No discounting applied

Sources: Australian Taxation Office, Research and Statistics (https://www.ato.gov.au/

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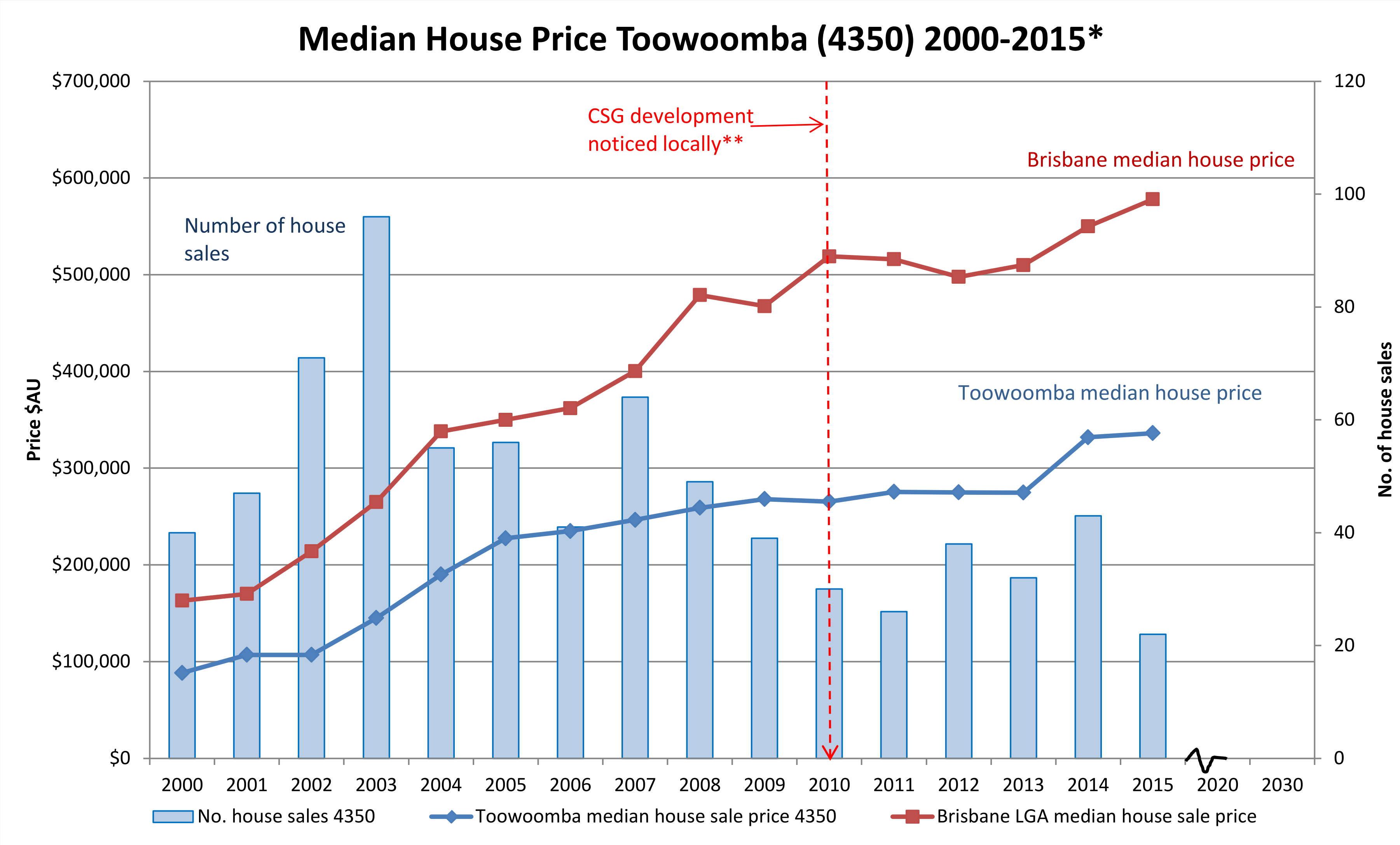
Data (2015) & Perceptions (2015) about incomes

- ***History and Trend*****:** Toowoomba personal incomes remain below, but they are increasing in line with the Queensland trend. Total business income increased slowly from around $50M in 2001 to $85M in 2012.
- ***Change*****:** Total wage and salary earnings have increased slightly since 2012 as has the number of wage earners. Average personal incomes remain below the Queensland average and show no significant increase. Total business incomes for Toowoomba as a whole more than doubled in a single year 2012-2013, and so did the number of businesses. These increases are sustained in 2013-14.
- ***Perceived change*****:** Those interviewed noted that local businesses are "disappointed with the CSG experience"; they felt they did not get the expected benefits. "Only a very small percent of local businesses benefitted". No real differences noticed in local spending.
- ***Expectations*****:** Local businesses expected to see more local spending, said interviewees. Some expected to be approached by CSG companies for their goods/services. Expectations, interviewees noted, were sometimes "unrealistic" and "misinformed". The downturn when CSG construction ended seemed more abrupt than expected. Interviewees expect that more businesses will go, and average income might decrease as CSG professionals lose high paying jobs.
- ***Conclusions:*** Although total business income more than doubled, the injection is reported to have gone unnoticed in the wider community.
- ***Implications for next project/stage*****:** Larger cities are able to absorb changes. The changes still occur, but they are not as noticed.
- ***Community recommendations*****:** Clearly communicate local procurement policies and procedures, and project timelines.



*Measured annually except for 2015, which was measure up to September 2015
Sources: Price Finder (http://www.pricefinder.com.au/flyover/?locality=4421&propertyType=House)
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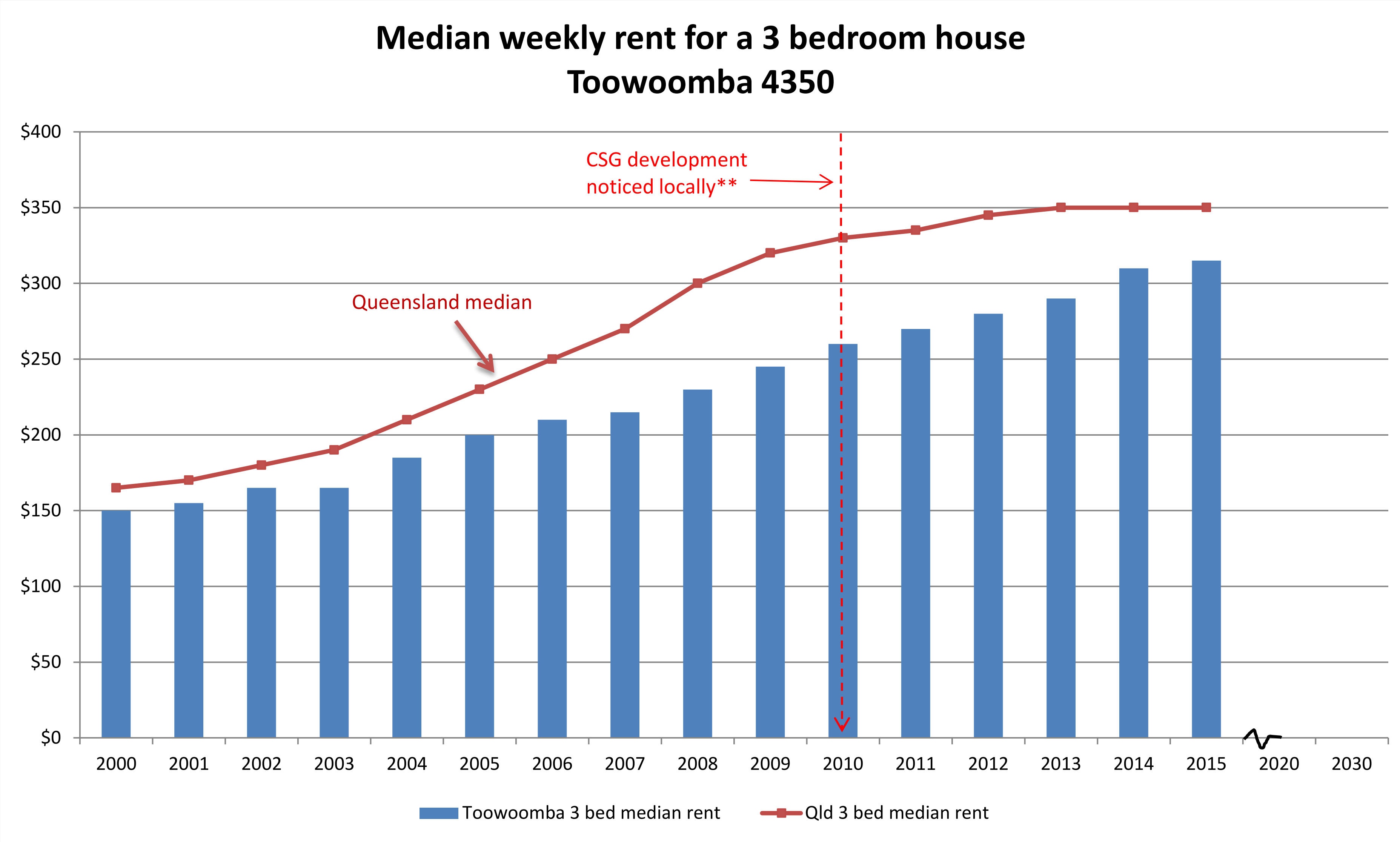

Measured in the month of June for each year.
Sources: Queensland Government Statistician's Office 2015
Residential Tenancies Authority, Rental Bonds data (Queensland Government Statistician's Office derived).
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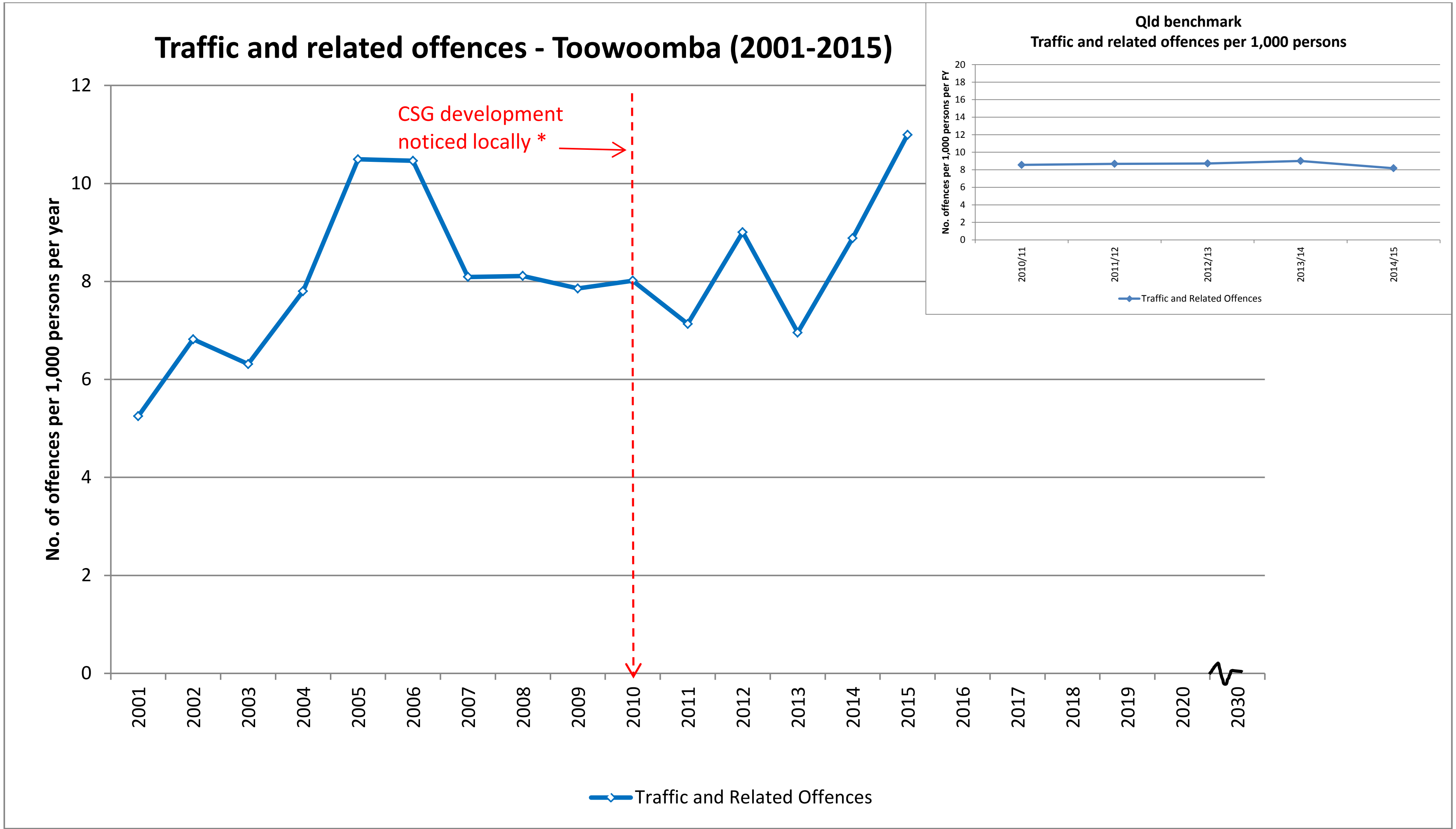
Data (2015) & Perceptions (2015) about housing

- ***History and Trend*****:** Toowoomba has an historically stable property market. The median sale price increased less than $50,000 in the 8 years from 2005 to 2013. As a service town, there has always been demand for rental accommodation, say those interviewed. Rents have been increasing steadily.
- ***Change*****:** In 2014, the median house price increased over $50,000 in a single year. In 2015, it has levelled off. Median rents increased slightly more than the rate in the long term trend. The number of houses listed as sold was lowest in 2015.
- ***Perceived change*****:** Some areas in Toowoomba are always in demand (e.g., close to schools, hospital), said those interviewed; sales and rents in these areas remain strong. Interviewees also noted that new development is occurring in outer suburbs. Toowoomba was promoted to southern investors as a real estate 'boom' town. Council incentives to build unit blocks have created a temporary oversupply of units. Some investors will lose money. A shortage of budget motel accommodation exists.
- ***Expectations*****:** Those interviewed expect that the property market in Toowoomba will remain strong as projects attract people. The current surplus supply of units will soon be filled with expected population growth. Investment returns will be low for some.
- ***Conclusion*****:** Demand for housing reflects strong growth. Council policy to increase housing density has created the most obvious change.
- ***Implications for next project/stage*****:** Toowoomba will be ready for expected population growth.
- ***Community recommendations*****:** None noted during the interviews.



Data retrieved for Toowoomba Queensland Police Service Area, and then filtered to report Toowoomba Postcode only (which is the best approximation to the UCL)
Crime rates per 1,000 persons calculated using ABS population estimates for the Toowoomba UCL (as reported by the Queensland Government Statistician's Office: www.qgso.qld.gov.au)
Qld Benchmark statistics sourced from https://www.police.qld.gov.au/rti/published/about/Crime+Statistics.htm
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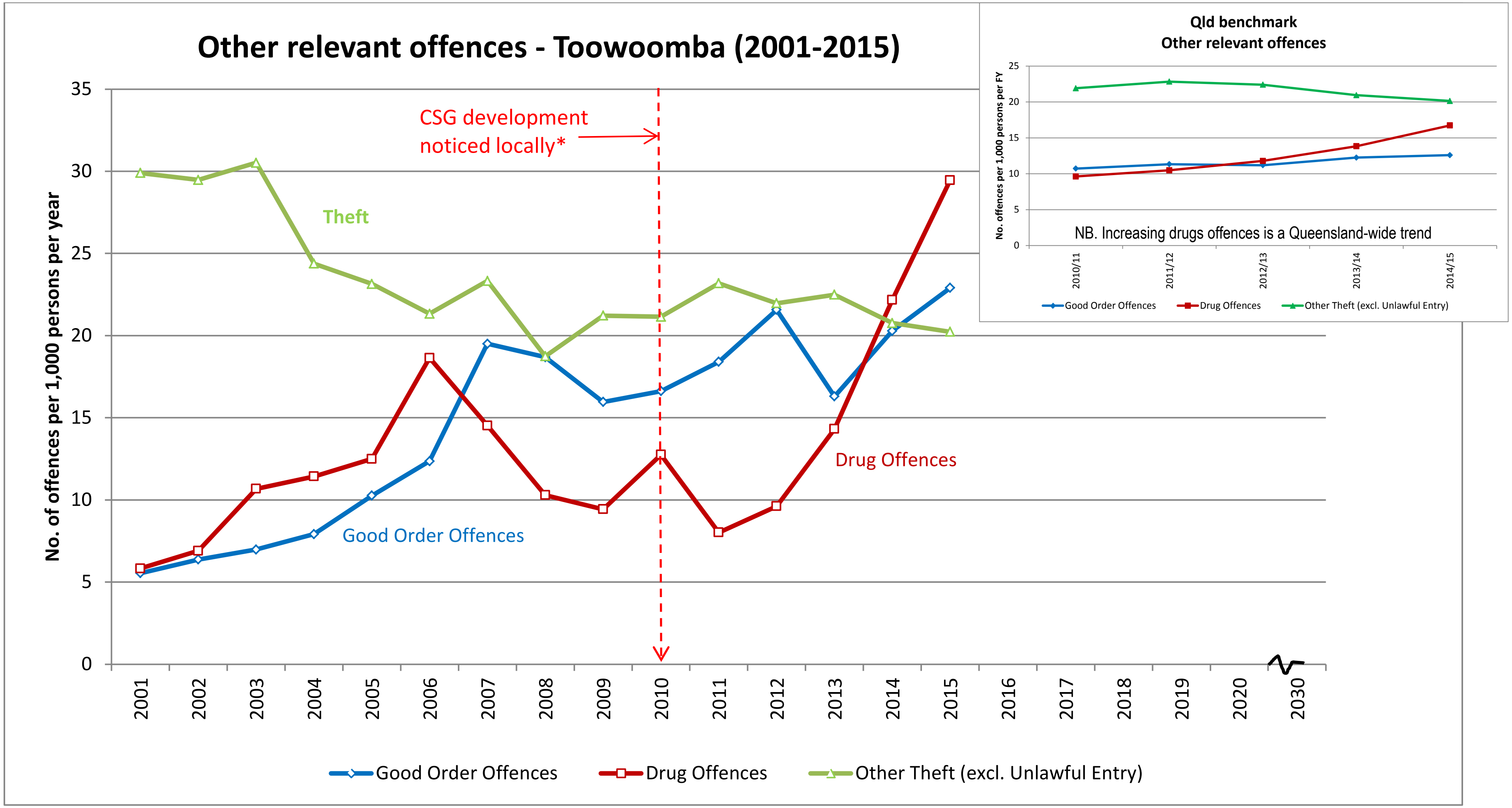

<u>Data source:</u>
Queensland Police Online Crime Statistics: https://www.police.qld.gov.au/forms/crimestatsdesktop.asp
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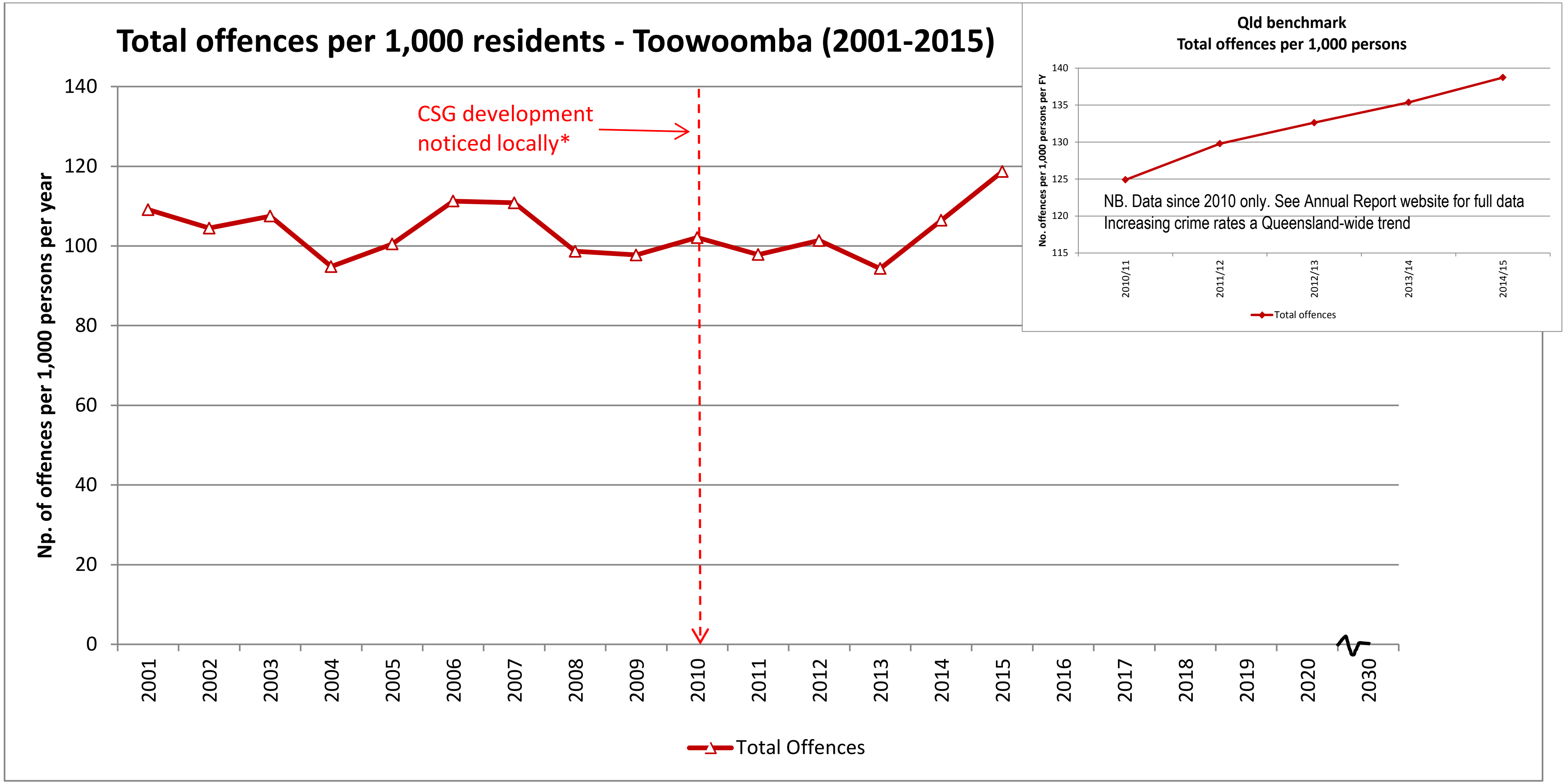

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Qld Benchmark statistics sourced from https://www.police.qld.gov.au/rti/published/about/Crime+Statistics.htm
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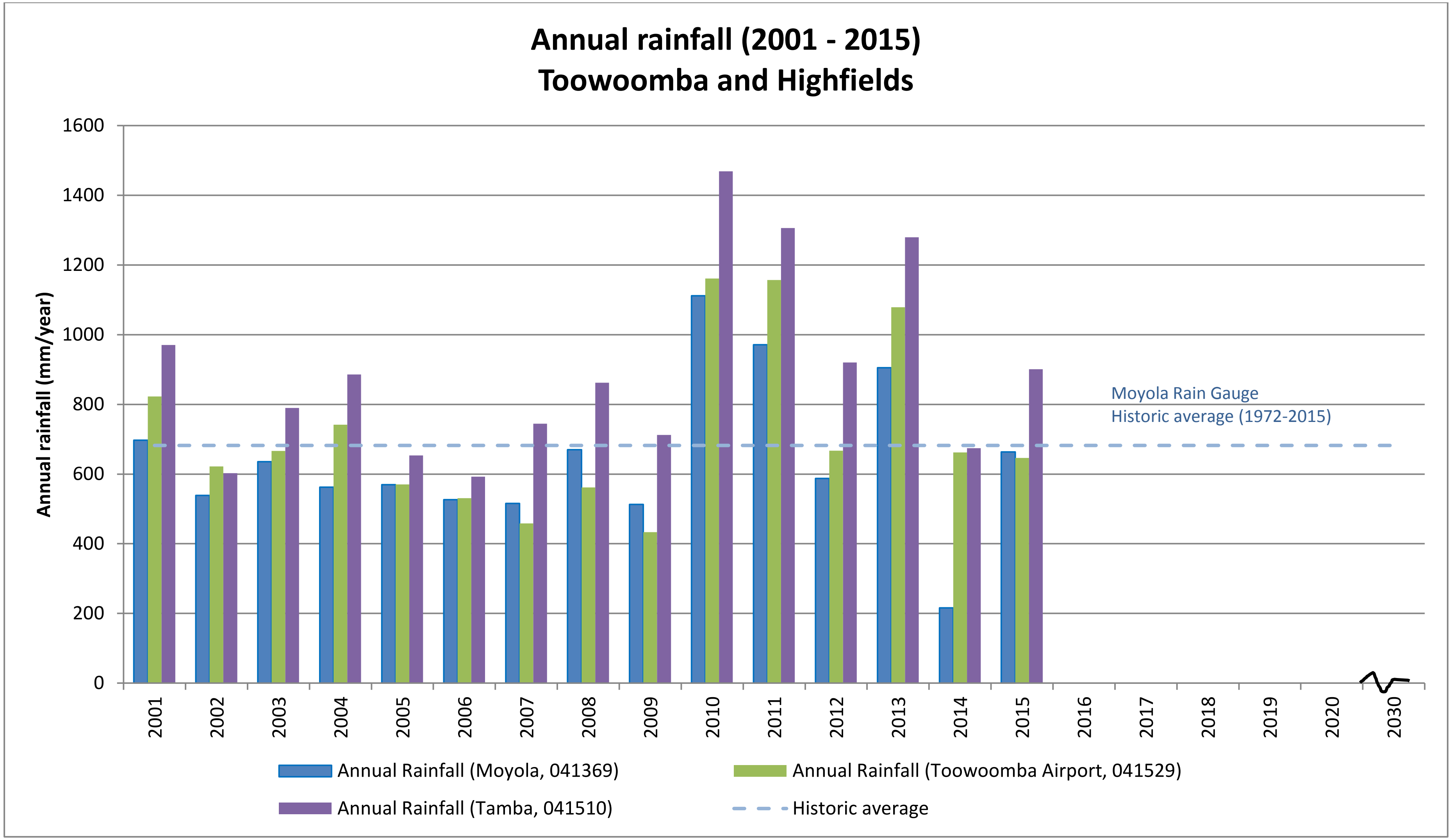
Data (2015) & Perceptions (2015) about safety & wellbeing

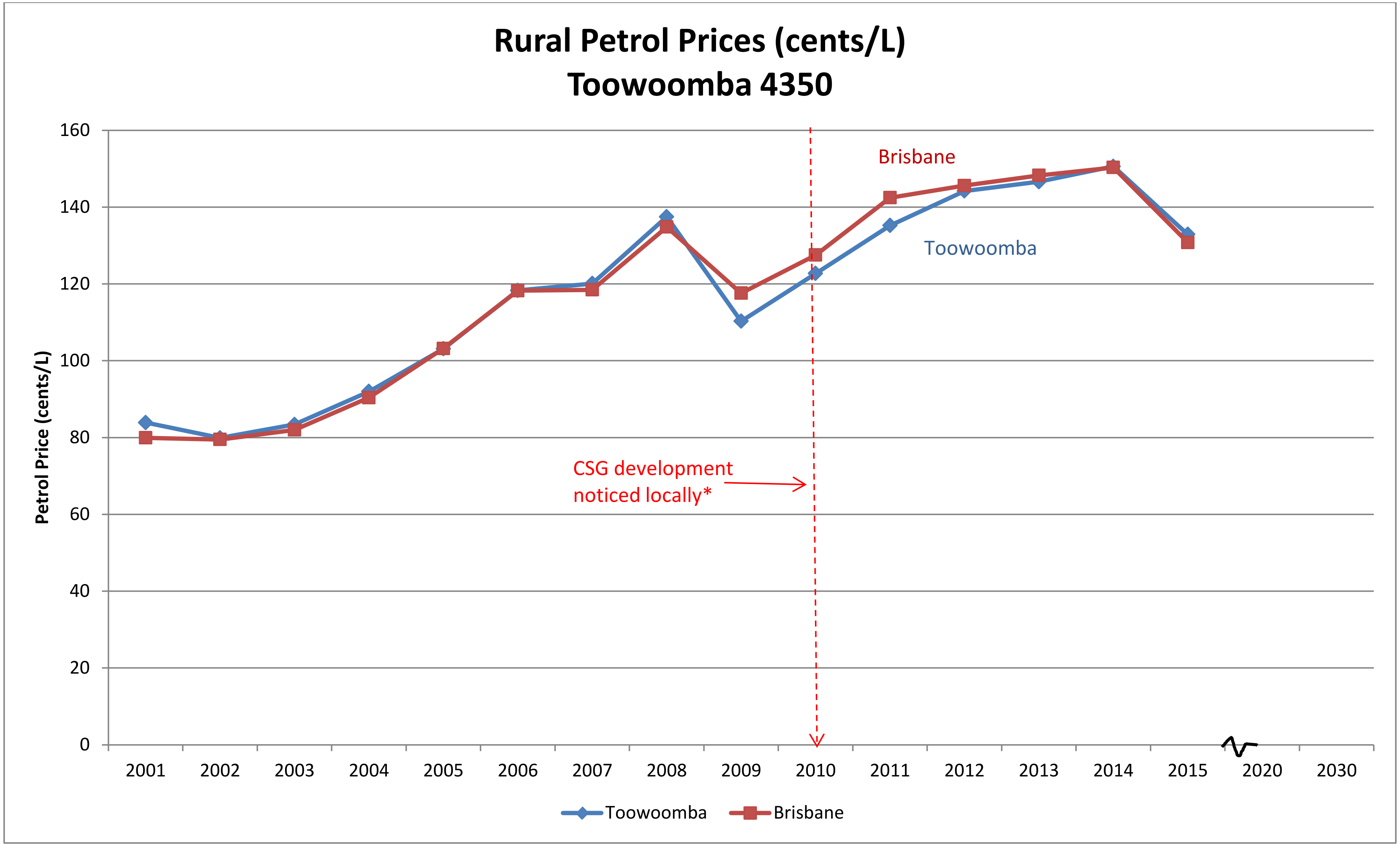
- ***History and Trend*****:** Crime rates in Toowoomba are well below the Qld benchmark. However, for some crime categories, rates are higher.
- ***Change*****:** Traffic offences are higher in Toowoomba than the Qld benchmark. They are increasing when the Qld trend is decreasing. There were increases in ‘crimes against the person’ in the peak years of CSG construction, from 2012-2014 (Qld Police Service, personal communication, 2015). Good order offences were high in 2012 and 2015. Drug offences have increased significantly since 2013.
- ***Perceived change*****:** “There is an increase in the use of drugs - it’s not too visible, though”, said an interviewee. Drugs are “no worse than any other place”. A high level of traffic offences reflects higher volumes of traffic, an interviewee explained. “Toowoomba is not a FIFO location; so we didn’t get the major FIFO issues of drinking and fighting and all that”.
- ***Expectations*****:** Increased police presence “will make a difference”. Less traffic, so traffic offences should go down again, said an interviewee.
- ***Adaptations:*** The ‘safe night precinct’ created in the CBD has a zero tolerance policy for bad behaviour. Zero tolerance for bad behaviour exists in employment contracts.
- ***Conclusion*****:** CSG development has had only very minor impacts on crime rates and on perceptions of crime among the key stakeholders interviewed.
- ***Implications for next project/stage*****:** The vehicle monitoring systems, wet camps (where alcohol is served), and zero tolerance of good order offences were seen as successful strategies to ensure safety.
- ***Community recommendations*****:** Monitor road crash statistics.



Data source: Bureau of Meteorology climate data online service: http://www.bom.gov.au/climate/data/

Data retrieved for rainfall stations (1) 'Moyola', Station ID 041369 which is located 7.8 km from Toowoomba, (2) Toowoomba Airport, Station ID 041529 which is located 4.1 km from Toowoomba and (3) Tamba, Station ID 041510 which is located 1.4 kms from Highfields.

Rainfall station was selected based on the closest active rain station with the most reliable historic data.



Source: Australian Automobile Association (2015) http://www.aaa.asn.au/aaa-agenda/affordability/latest-fuel-prices/

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Alignment of Visions- Toowoomba

Indicator topic	Community Visions	Regional Council plans	State government plans	Academic studies*	Federal government plans
Population	• Family-friendly and culturally diverse	• Population growth	• Young and skilled population, hosting region's DIDO workers	• Population growth, socio-economic diversity	• Population growth and culturally diverse
Housing	• Affordable and quality housing available to all, protected from incompatible land uses	• Access to housing choices	• Diverse, affordable, quality, cohesive housing for all residents, with growth in satellite suburbs	-	-
Health and Safety	• Safe community with public and active transport sector and clean air and water	• Safe & healthy community with safe active transport & roads	• Healthy and safe community, hazards reduced, safe public transport	-	-
Liveability	• Cosmopolitan centre with "country feel", inclusive, with community engaged in decision-making	• Inclusive & diverse community, identity protected, promote arts and recreation, with community engaged in decision-making	• Inclusive & progressive community, identity & heritage protected, local government are lead planners with community engaged	-	• Local governments as lead planners
Income and Equity	• Promote social justice and equity of access	• Equitable access to services	• Prosperity & high wages for skilled workers, with resources for future generations	-	-
Employment	• Diverse employment options & local population supplies workforce needs	• Employment opportunities from diverse economy	• Diverse employment opportunities for all with flexible arrangements	• Workforce to grow and to supply surrounding region via DIDO	• Promote employment in agriculture
Business	• Diverse economic growth with minimised "red tape", benefits flow to community	• Diverse economic growth with minimised regulation, which supports local values and supplies region	• Diverse economic growth with industries coexisting, and supplies region	• Coal and gas boom through to 2030-40	• Coexistence of industries, limited regulation on major developments, inter/ national market access
Skills and education	• Educational excellence & lifelong learning, local workforce skilled for industry	• Education increased and skilled workforce for industry needs	• World class education and skilled workforce for regional industry	-	-
What are the main goals for the town/region?	• Cosmopolitan heart with rural heritage supported by integrated planning for health, environmental sustainability and economy	• "A vibrant, inclusive, environmentally rich and prosperous region that embraces the future while respecting the past."	• Values and identity protected with strong economic growth & resilient communities	-	-

References: Everingham, J, Devenina, V, Collins, N (2015) The beast does't stop": the resource boom and changes in the social space of the Darling Downs. Rural Society 24(1): 42-64.
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