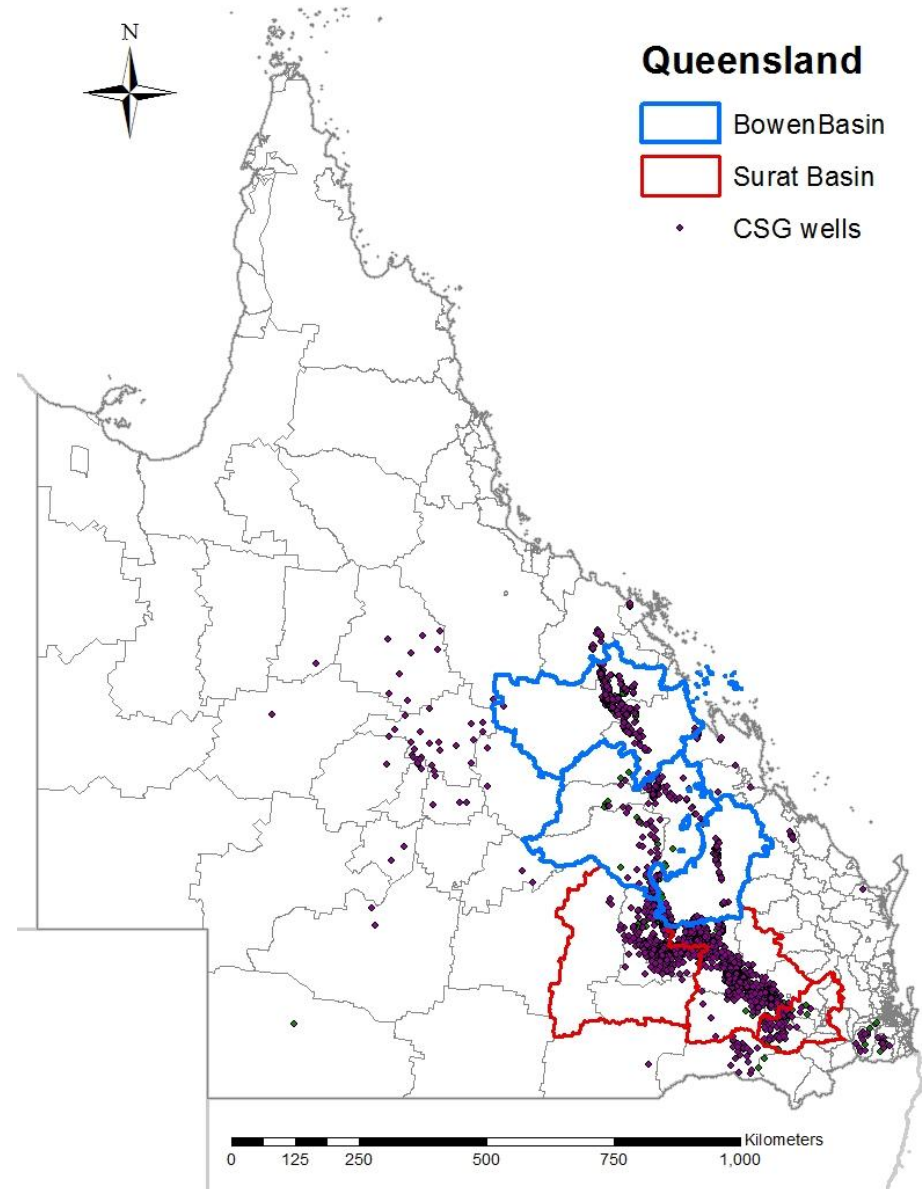


Social and Economic Research

November 2014



Situating changes within broader rural trends

Out-migration is the dominant trend for rural regions

- Young people in particular leave to seek employment and education elsewhere
- More prevalent in women than men
- Leads to skewed population profiles

Leads to loss of human capital

Rural regions also tend to have lower incomes than urban regions

The combination of these issues is referred to as 'rural decline'

This research focused on how CSG development has affected these issues

Census data analysis of CSG basins

Census data is the most reliable data available for measuring observed change

- Allows us to screen out non-residents (FIFO-DIDO)
- Allows NET calculations: count positive and negative changes in jobs

We looked at census data for all Statistical Local Areas in Surat and Bowen Basins

- Direct jobs, indirect jobs and income
- Youth share of total population (males and females)
- Qualifications (TAFE/University)

Conducted as a time series:

- 2001 (before any significant CSG industry)
- 2006 (industry established but still small)
- 2011 (over 4000 wells and continuing to expand)

Economic changes in CSG regions during construction

- **Family income** increased **15%** in CSG regions compared to other rural Queensland
- Average 100 new gas/mining jobs per SLA.
- Approx **30%** higher non-gas/non-mining employment growth in CSG regions compared to other rural Queensland
- Increased jobs in construction and professional services
- Reduced jobs in agriculture
 - (statistically significant compared to other rural regions)

Surat specific results (residents):

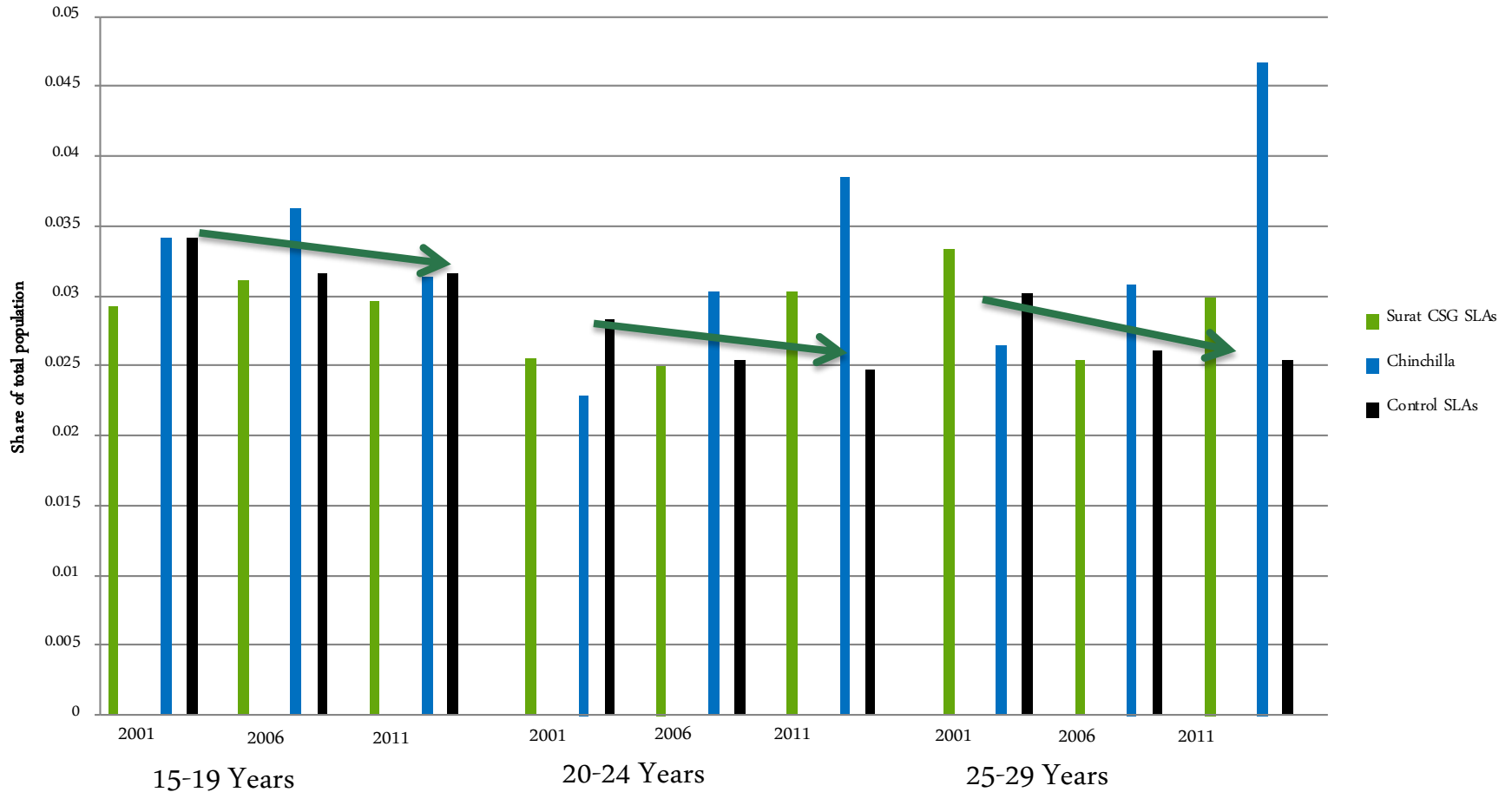
- Total of 1400 new NET jobs for residents 2006-2011
 - i.e. excludes FIFO/DIDO in work camps
- 600 directly in resources sector
- 800 in other sectors

Reversal of rural community decline during period in focus

- Between 2006 and 2011 **youth migrated** to CSG regions
- Youth in CSG regions are **more skilled** than in non-CSG regions
- **Females and males** migrated to CSG regions in equal numbers
- It remains to be seen how these issues will play out into the future

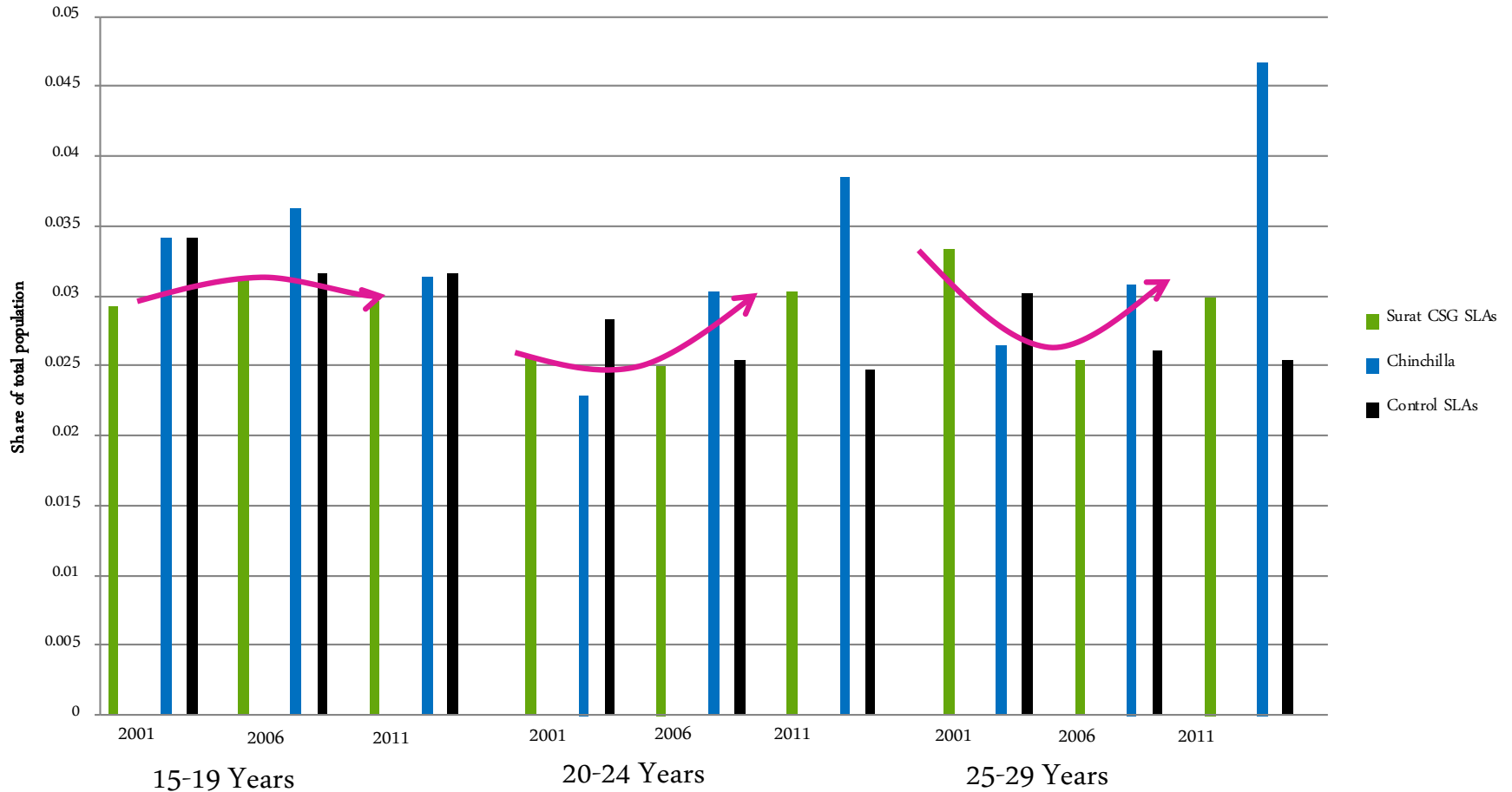
Results: change in youth population

Male Youth Population Share, 2001-2006-2011



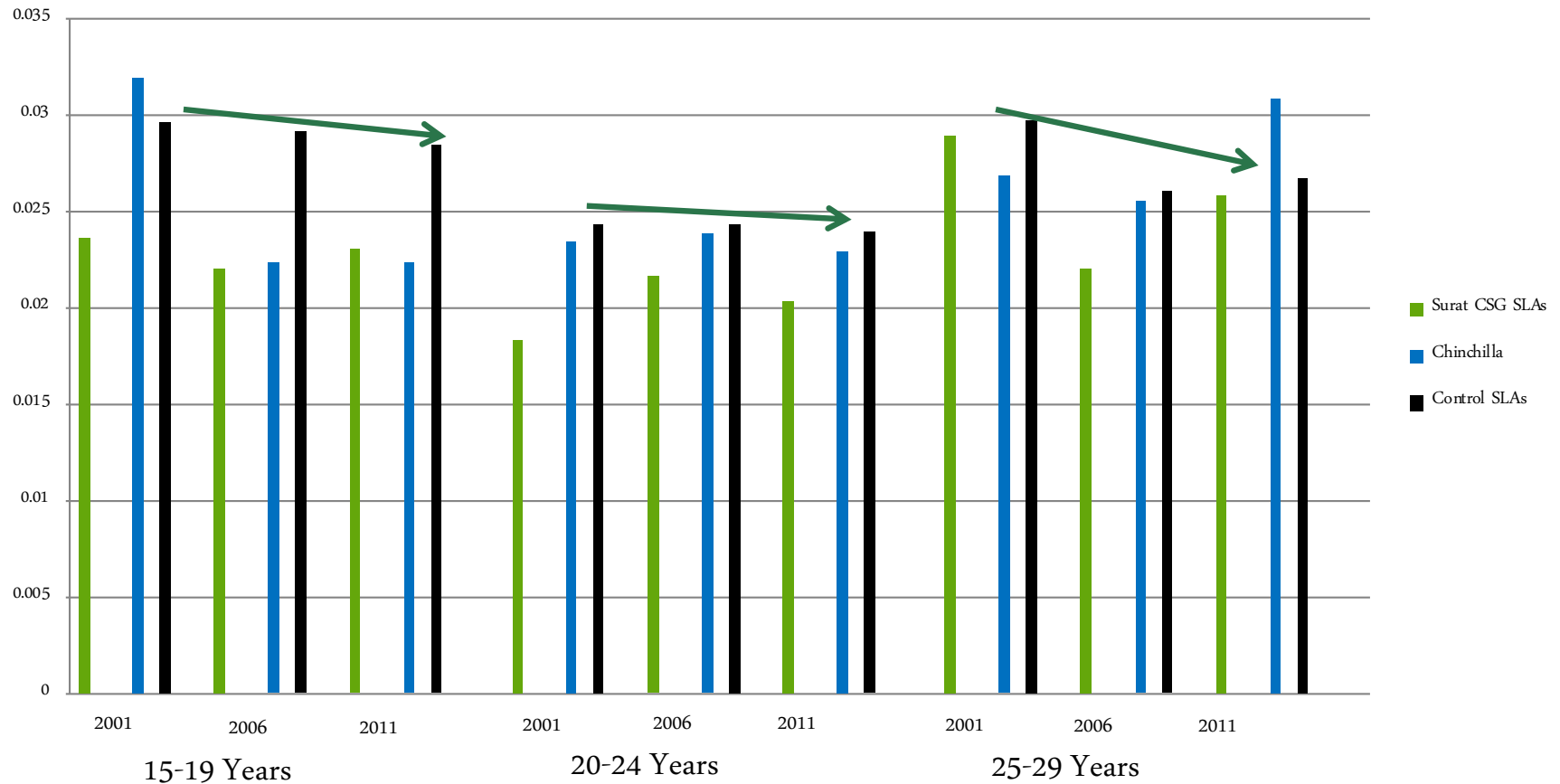
Results: change in youth population

Male Youth Population Share, 2001-2006-2011



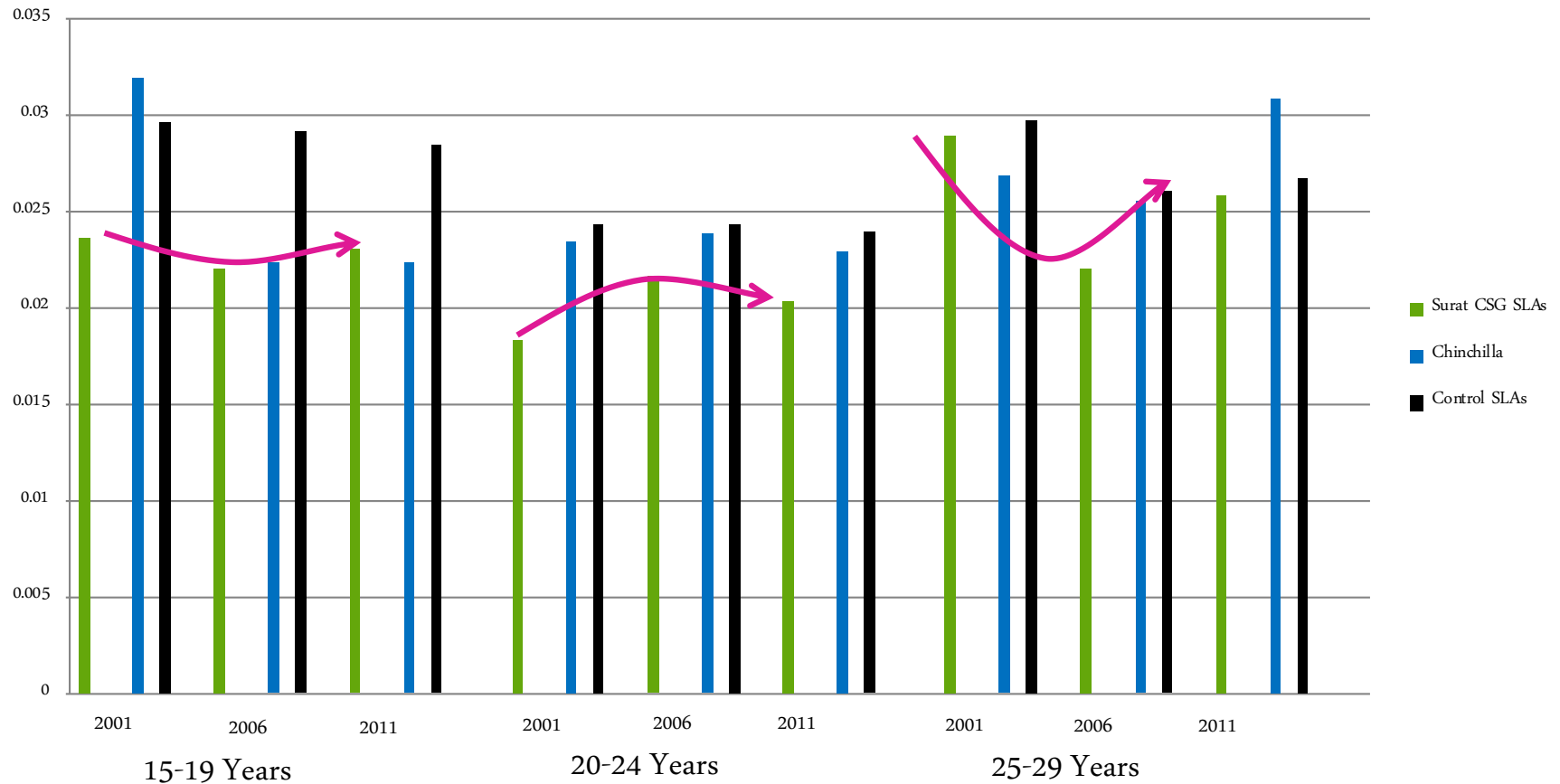
Results change in youth population

Female Youth Population Share, 2001-2006-2011



Results change in youth population

Female Youth Population Share, 2001-2006-2011



Conclusion

- Key benefits identified by this research:
 - Retaining and attracting youth
 - Youth skill increases
- Reversed the trend towards rural decline compared with other rural areas
- There are also Net employment increases for residents
- Family income has increased around 15%

Thank you

Tom Measham

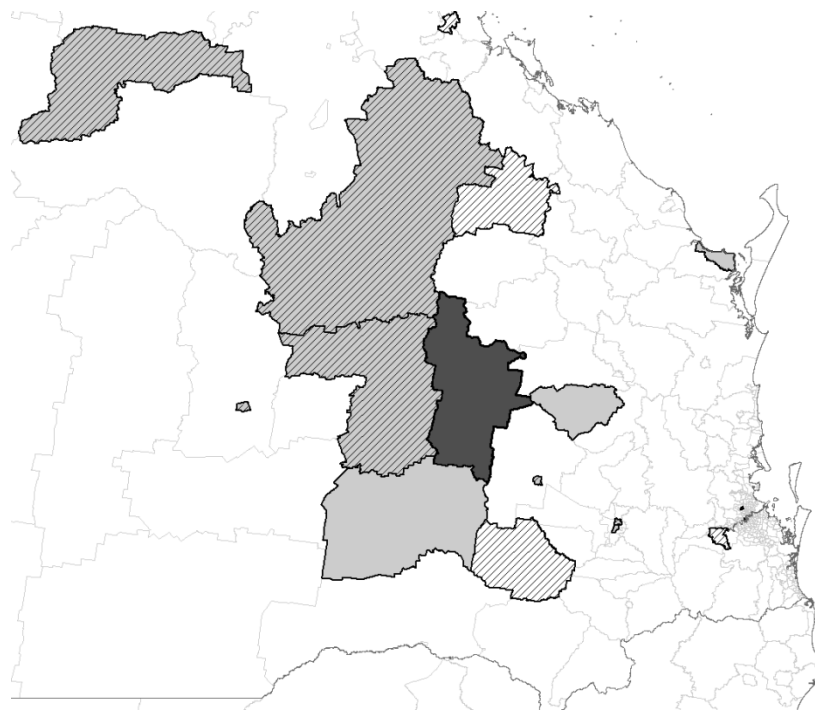
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Detailed analysis of Chinchilla: Where did youth come from?

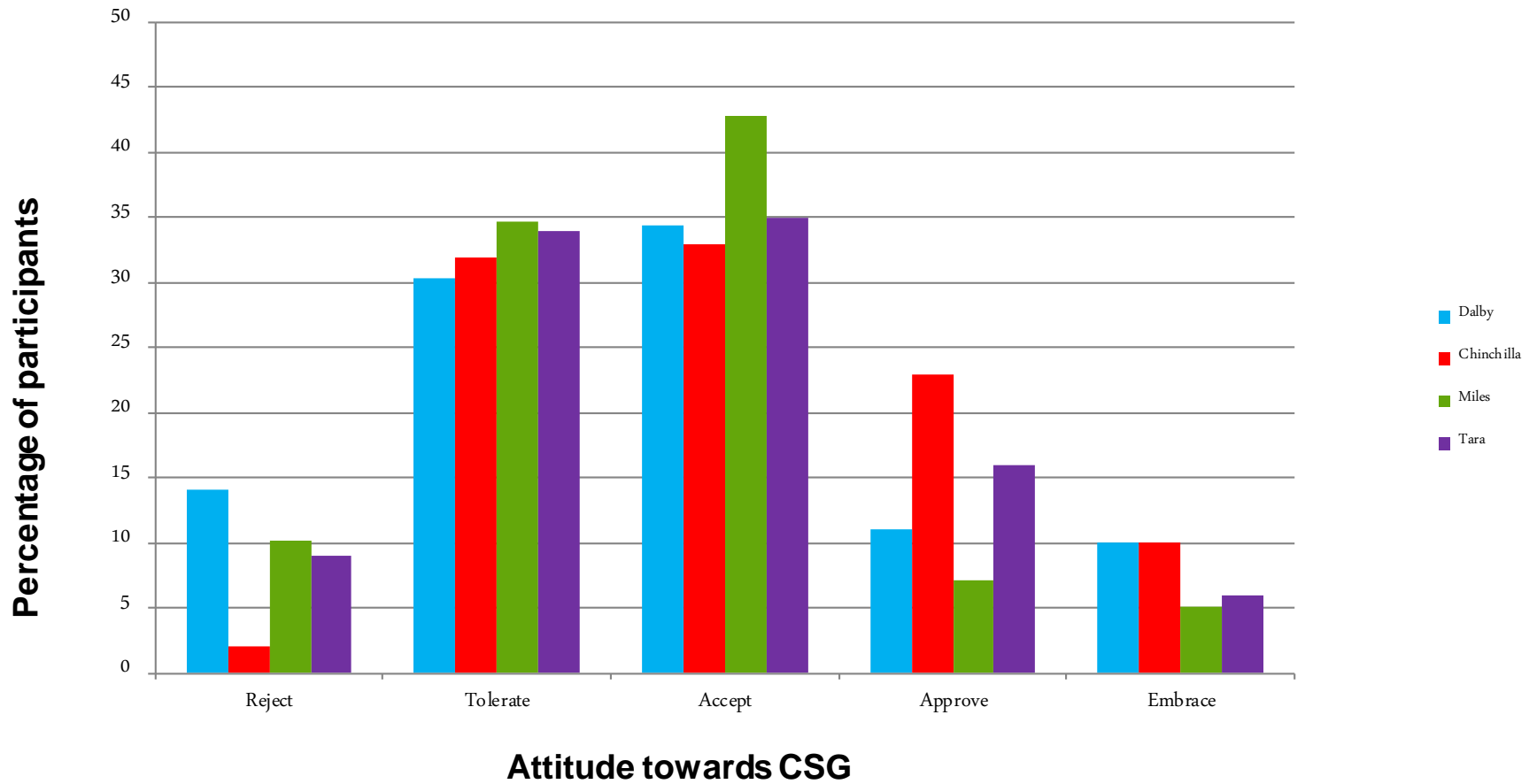
- Within regional Queensland,
- Coastal/urban areas and
- Interstate, overseas



Top ten origin regions

Men	Women
Overseas (44)	Overseas (22)
Toowoomba (35)	Toowoomba (27)
Queensland, not stated (18)	Queensland, not stated (15)
Brisbane (16)	Murilla-Wan (15)
Kingaroy (13)	Emerald (12)
Dalby (11)	Mount Isa (10)
Mount Isa (10)	Monto (10)
Murilla-Wan (10)	Banana (9)
Hervey Bay (9)	Ipswich (9)
Other Aus (113)	Other Aus (168)

Community Attitudes & Feelings towards CSG



Community Adaptation

