

Appendix 8.2: UMR Community Survey Results Summary

1 UMR SURVEY RESULTS SUMMARY

This appendix provides a summary report of the community attitudes survey in the gas fields undertaken by UMR Research Pty Ltd in November 2008.

1.1 PROFILE OF RESPONDENTS

1.1.1 People Consulted

On Wednesday 5 November and Thursday 6 November 2008, four qualitative focus groups, with 7-9 people per group were conducted in Chinchilla, Miles, Dalby and Toowoomba. Additional fieldwork was undertaken from 25-30 November 2008, and 400 phone interviews conducted with people over the age of 18 within the Gas fields region, including 100 from each of the former Local Government areas of Chinchilla, Murilla, Dalby and Toowoomba.

This consultation found that people in the Gas fields are generally optimistic about the future of the region, with 68% believing the region is heading in the right direction. In particular, residents of Dalby are very optimistic about the future of their town, with 80% of respondents believing they are heading in the right direction.

1.1.2 Awareness of Company and Project

The vast majority of respondents (79%) were unsure or had not heard of BG Group. Those who had generally had a more positive (17%) than negative (4%) opinion of the company. Chinchilla (28%) and Murilla (22%) had the highest levels of awareness of the company. Over half of the residents consulted had heard of QGC (55%) and had a positive opinion of the company. Chinchilla (76%) and Murilla (60%) had higher than average positive opinions of QGC.

There was however a high awareness of natural gas exploration in the local area (69%). The highest levels of awareness were in Chinchilla (82%) and Murilla (90%), while in Toowoomba only one third of those consulted were aware of gas exploration in their region. Awareness of the companies extracting the gas not quite as high, however QGC, Arrow Energy and Origin Energy were all known by those consulted to be extracting gas in the local area. The majority of people consulted saw the natural gas industry as having a positive impact on the region (72%)

Awareness of the Queensland Curtis LNG (QCLNG) project to extract natural gas varied across the region. Awareness was highest in Chinchilla (64%) and lowest in Toowoomba (20%). Although awareness of the project was low in some areas, when the project was outlined to them, 74% of people consulted throughout the gas field region were positive about the likely effects of the project on the local area

1.2***EMPLOYMENT AND ECONOMY***

75% of people consulted in the gas field region believe that there are good opportunities for employment in the area. Endorsement of employment opportunities appear to be higher in Chinchilla (80%) and Dalby (87%) compared with Murilla (64%) and Toowoomba (68%). Overall, only 14% of respondents are concerned about lack of local job opportunities in the region, and these people generally reside in Toowoomba and Murilla.

The gas industry is generally seen as a positive for employment in the region, with more younger people staying in towns such as Chinchilla as more job opportunities emerge. However, it is also seen as negatively impacting on employment due to local businesses struggling to get workers because of the higher money offered by resource companies in the local area.

87% of people consulted believed the QCLNG Project would have a positive impact on jobs for the local community, particularly in Chinchilla, where 93% of people believed there would be a positive impact, and only 5% a negative impact on job opportunities.

The increasing cost of living is something which concerned people throughout the gas field area, with 23% of people reporting that it worries them 'a fair bit' and 18% 'a lot'. People were generally more concerned in Chinchilla (45%) and Murilla (43%). Furthermore the cost of electricity and water worried 32% of respondents, and concerned people in Toowoomba (49%) more than other factors such as housing, health and employment.

81% of people consulted in the region see the project as having a positive impact on the economy of the local area, and the same percentage believed the project will bring an economic boost by providing help for local businesses through increased demand for local goods and services. More than half of the people consulted also see the project as having a positive impact on royalties to the Queensland Government (60%).

Many people consulted also believe that the large amount of LNG being exported will result in gas prices rising for Australian households. This was highest in Dalby at 39%, and Chinchilla and Murilla with 35%.

1.3***LIFESTYLE AND COMMUNITY VALUES***

There is a strong sense of community within the gas field, and residents are generally very content, with 95% of people consulted reporting the area as a good place to live, and 89% reporting a strong sense of community. Consultation also highlighted that many people value a clean environment and good lifestyle in the gas field communities.

A number of environmental concerns were raised including the extraction of methane, potential for salinity and potential for creating a bad environmental legacy. 56% of people consulted throughout the gas field see the project as potentially having a negative impact on the local natural environment, and

40% believe an increase in saline water in the area would have a negative impact. Although many people consulted were concerned about saline water in the region, overall 62% of people consulted believed that turning it into drinking water for local communities following extraction would have a positive impact on the region. Positive opinion of this was highest in Chinchilla (70%).

94% of respondents believe the gas field offer a good lifestyle to residents, particularly in Murilla Shire where 98% of people consulted believed the town offered a good lifestyle. However, 31% of people are also concerned about the lifestyle of children in the region and the lack of activities for children and teenagers, particularly in the Dalby area (39%).

People were also apprehensive about the impact of local industry on their current lifestyle, particularly regarding farming.

1.4

COMMUNITY INFRASTRUCTURE

Residents were generally concerned about the quality of roads and access to services and facilities in the gas field region. 76% of people believed the area is accessible to major services and facilities. Only 15% of people consulted reported being concerned about limited access to community services and facilities, and this concern was highest in Murilla Shire (25%).

30% of people consulted in Chinchilla were worried about the limited number of shops in town, while 23% of people consulted in Toowoomba were concerned about facilities for old people and seniors. Concerns about lack of childcare (11%) and sporting facilities (10%) ranked as the least of peoples' concerns within the gas fields communities.

Many people consulted throughout the region saw the project as having a positive impact on local infrastructure, community services and facilities. 71% of people believe that the project would have a positive impact on investment for local infrastructure, while 60% see it as having a positive impact on community services and facilities. These figures were highest in Chinchilla and Murilla regions.

More people reported being concerned about the quality of local roads in the area than any other factor (53%), particularly in Chinchilla (62%) and Dalby (68%). People in all towns believed that the project could have a negative impact on the condition of local roads from industrial equipment being transported (72%), with farmers (80%) and people in Dalby (88%) particularly concerned about the potential negative impact.

1.5 HEALTH AND SAFETY AND SECURITY

1.5.1 Health

Across the gas field, the lack of access to medical practitioners was a high concern (44%), and those consulted in Dalby (53%) were particularly concerned.

After hearing about the project, 35% of people consulted believed the project could have a positive impact on community and health services and medical facilities, while 29% believe it would have a negative impact on health services and 32% believe it would have a negative impact on medical facilities.

Farmers consulted in the region expressed higher than average concerns regarding health, with 37% of the opinion that the project would impact negatively on the area, and 35% believing that it would also have a negative impact on access to community and health services. On the other hand, 48% of people consulted in Murilla saw the project as having a positive impact on access to community and health services and medical facilities in the local area.

1.5.2 Safety and Security

Overall, people in the gas field communities did not have a high degree of concern about the health and safety standards and practices in LNG industry. Only 13% of people reported some concern, 15% were unsure, while 72% of people reported having no concerns about industry safety standards. Highest levels of concerns were reported in Murilla and Toowoomba where 16% of respondents expressed concern.

A rise in crime and break-ins was one of the concerns raised during consultation, with 32% of people consulted expressing concerns about crime and break-ins. People in Dalby (42%) and Toowoomba (42%) were particularly concerned, while only 17% of people in Murilla expressed their concern about crime in the region.

In terms of the Queensland Curtis LNG Project, 34% of people believed that the project would have a negative impact on crime and break-ins in the local area. Farmers (45%) and Chinchilla residents (47%) were particularly concerned about the potential negative impact of the project on crime and break-ins in the local area.

1.6 HOUSING

Although 95% of people consulted believed the region to be a good place to live, overall housing affordability in the gas field communities is seen as a concern, with only 43% of people believing it to be affordable in their local area. Generally housing was seen as more affordable to local residents in

Toowoomba (70%) and Murilla (52%) than in Chinchilla (22%) and Dalby (29%).

The lack of affordable housing in the region worried 37% of people, but again concerns were particularly high in Chinchilla (48%) and Dalby (42%) compared with Murilla (34%) and Toowoomba (26%).

Overall, 63% of people see the QCLNG project as having a potential negative impact on overall housing affordability. This was particularly a concern for those in Chinchilla (75%) and Dalby (73%), but was of lesser concern for those in Murilla (59%) and Toowoomba (49%).

1.7

SUMMARY

Throughout the gas fields respondents were happy about living in their local area, and were generally positive about the natural gas industry's contribution to their region. However, they were concerned about the poor quality of roads in the gas field, lack of access to medical facilities, and the increasing cost of living including housing costs.

Consultation also demonstrated that people in the gas field area have a degree of awareness of gas exploration and gas companies in the region, but had a low awareness of the QCLNG Project. Nevertheless, there was a strong expectation that the project will have a positive effect on local communities.

According to those consulted, potential positive impacts of the project include an increase in jobs for the local community, support for local businesses, community groups and the economy. Consultation also raised a number of concerns regarding the project, and factors believed to have a negative impact on the region include allowing gas explorers to have unlimited access to farm land, damage to local roads as a result of industrial equipment being transported, and an overall decrease in housing affordability.

2 UMR SURVEY RESULTS SUMMARY – GLADSTONE

2.1 PROFILE OF RESPONDENTS

2.1.1 People Consulted

On Monday 27 and Tuesday 28 October 2008, four qualitative focus groups, with 7-9 people per group were consulted in Gladstone. Additional fieldwork was undertaken from 20-23 November 2008, and 600 phone interviews conducted of people over the age of 18 within a 20km radius of the town of Gladstone.

2.1.2 Awareness of Company and Project

Results of the consultation demonstrate that more people consulted had heard of and had a positive opinion of Queensland Gas Company (QGC). The vast majority of respondents (82%) were unsure of or had not heard of BG Group, and those who had generally had a more positive (13%) than negative (5%) opinion of the company. Over half of the Gladstone community consulted had not heard of QGC, but those who knew of them generally had a positive rather than negative opinion.

There was a high awareness of the QCLNG project amongst the Gladstone community, with 80% of those consulted having an awareness of the project. Almost all men consulted (89%) have heard of the project compared with women (71%). 52% of those consulted within the Gladstone community were of the opinion that the QCLNG project is a good thing for Gladstone. 20% of people thought it would be bad, while the remaining 27% were unsure.

Only 25% of people consulted had visited Curtis Island within the last twelve months, while one third had never visited the island. When asked about the development of the LNG Plant on Curtis Island, 42% of those consulted reported concerns, 53% reported no concerns, and 5% were unsure. People who had visited Curtis Island within the last twelve months were generally more concerned about the development (53%) than those who had not, while 48% of people who had visited the island within the last twelve months were comfortable with the LNG Plant being built on Curtis Island.

2.2 EMPLOYMENT AND ECONOMY

Industry was seen as necessary by many of the people consulted in the community, and responsible for providing good job opportunities for people in Gladstone. 92% of people consulted believed that Gladstone offers good job opportunities, while only 14% worried about lack of job opportunities.

84% of people consulted saw the construction of project as having a positive impact on the number of permanent jobs in the Gladstone region, and 80% of people also see it as having a positive impact on training opportunities. 85% of people consulted saw the project as having a positive impact on permanent jobs in Gladstone during the operational phase of the project.

Out of all of the impacts identified, 23% of people reported that permanent jobs coming out of the project were the most important factor to them. When hearing that the project would create 3000 more construction jobs across Queensland, 73% of people reported being more favourable towards the project.

Industry was seen as being responsible for many of the good things in Gladstone, including sustaining the local economy. However it was also seen as being responsible for some of the bad things in Gladstone, including the upward pressure on the cost of living.

People consulted within the Gladstone community highlighted issues concerned with the upward pressure on the cost of living in Gladstone, reporting that everything seems to cost more because of the industry. Consultation demonstrated that the cost of living worried 31% of people a lot, and 22% of people a fair bit. Similarly, the cost of electricity and water worried 21% of people a lot, and 16% of people a fair bit.

A large proportion of respondents believed that the Queensland Government does not spend enough money in Gladstone (72%), whilst a small percentage believed the government spends too much money in the area (3%). 19% of people consulted thought the government spends about the right amount, while the remaining 6% were unsure.

Regarding the QCLNG project, many people believed the benefits from the construction of the project would include a boost to the local economy. 89% of people consulted saw the project as having a positive impact on the economic growth of Gladstone, compared to 4% of people who saw the project as having a negative impact. During the operational phase of the project, 86% of people saw the project as having a positive impact on State-wide economic benefits and royalties to the Queensland Government, compared with 4% who saw it as having a negative impact.

2.3

LIFESTYLE AND COMMUNITY VALUES

Consultation with the Gladstone community demonstrated that community engagement levels are high, with 86% of people saying they feel part of the local community, and 84% of people knowing the names of their neighbours. In addition to this, the majority of people believed that Gladstone has friendly people (92%), and has a strong sense of community (82%).

The vast majority of respondents believed that industry in Gladstone makes a positive contribution to the local community (85%), while a small proportion of people believed it to have a negative impact (7%), or were unsure (8%). In

terms of the QCLNG project, 56% of people consulted believed the project will make a positive impact on community vitality.

When told that the proposed LNG Plant on Curtis Island would occupy less than 1% of the island and be surrounded by a Government declared environmental protection zone, 51% of the people were more favourable towards the project, 34% remained neutral, and 16% were less favourable towards the project.

86% of people believed that Gladstone offers a good lifestyle to residents. However, many people were concerned with the project's potential impacts on recreational boating and fishing activities, with 42% of people believing the project would have a negative impact during the construction phase, and 47% believing there would be a negative impact on recreational boating and fishing activities during the operational phase of the project.

The majority of people believed there would be an impact on the habitats of birds and turtles, (76%), people living on Curtis Island (75%), fisherman using the harbour (67%), and people visiting the island for camping or bushwalking (65%).

2.4

COMMUNITY INFRASTRUCTURE

There were significant concerns in Gladstone about a lack of co-ordination and planning to cope with Gladstone's growth. There was also a strong perception that public decision makers take a 'see how it goes' approach to planning for additional services and infrastructure in Gladstone, resulting in a lag time between significant population increases and infrastructure being upgraded to meet requirements. Consultation highlighted the current pressure on local infrastructure including hospitals, roads and child care.

Some people consulted in Gladstone made favourable comparisons with Newcastle, a city transformed from heavy industry wasteland to a prosperous lifestyle oriented regional centre.

Only 47% of respondents believed Gladstone to have good access to major services and facilities, and there were a number of concerns regarding access to local services and infrastructure. People were concerned with the limited number of shops in town (49%), lack of activities for children and teenagers (45%), facilities for old people and seniors (39%), the cost of electricity and water (37%), lack of sporting and childcare facilities (20%) and limited educational facilities (15%).

42% of the people consulted saw the project as having a positive impact on community services and facilities, while 35% saw it as having a negative impact on services and facilities.

2.5 HEALTH AND SAFETY AND SECURITY

2.5.1 Health

Generally people within the Gladstone community enjoy good health (91%), with only 9% of people reporting they never or only sometimes have good health.

17% of people worried a lot, and 39% worried a fair bit about the lack of access to medical practitioners, while 55% of people overall were concerned about air pollution from local industry. A greater proportion of people believed that during the Project's construction, the project would have a negative impact on community or health services (48%) than a positive impact (24%).

2.5.2 Safety

Less than one third of people consulted were concerned about safety standards and practices in the LNG industry (58%), while the majority (64%) of people were also unconcerned about LNG being transported.

A slightly higher proportion of people believed the project would have a negative impact on community safety (33%) than a positive impact (27%) during the Project's construction.

2.6 HOUSING AND ACCOMMODATION

Many people were worried about housing affordability in Gladstone. While 86% of people see Gladstone as a good place to live, only 29% believed it offers affordable housing. Even people who owned their own homes worried about whether their children will be able to afford to live in Gladstone. Many of the people consulted believed that Gladstone's housing affordability problem is due to industry.

70% of people believe that the construction of the project will have a negative impact in housing affordability, compared with the 16% of respondents who believe it will have a positive impact.

2.7 SUMMARY

The community attitudes survey found that Gladstone residents were generally optimistic about their town but are uncertain about its future path. They believed it offers a good lifestyle with good job opportunities and a strong sense of community. However, people were concerned about increasing population putting pressure on housing affordability, health facilities and infrastructure in general.

While BG Group was generally unknown, most people had heard of the QCLNG Project. Approximately half were positive, one third unsure, and one fifth of people consulted were negative about the project and its potential impact on Gladstone. Those that were negative about the project were most worried about upward pressure on housing affordability. Many of the people consulted believe the project would have positive impacts on the economy and job opportunities.