

Appendix B: Port Stephens Socioeconomic and Industry Profile

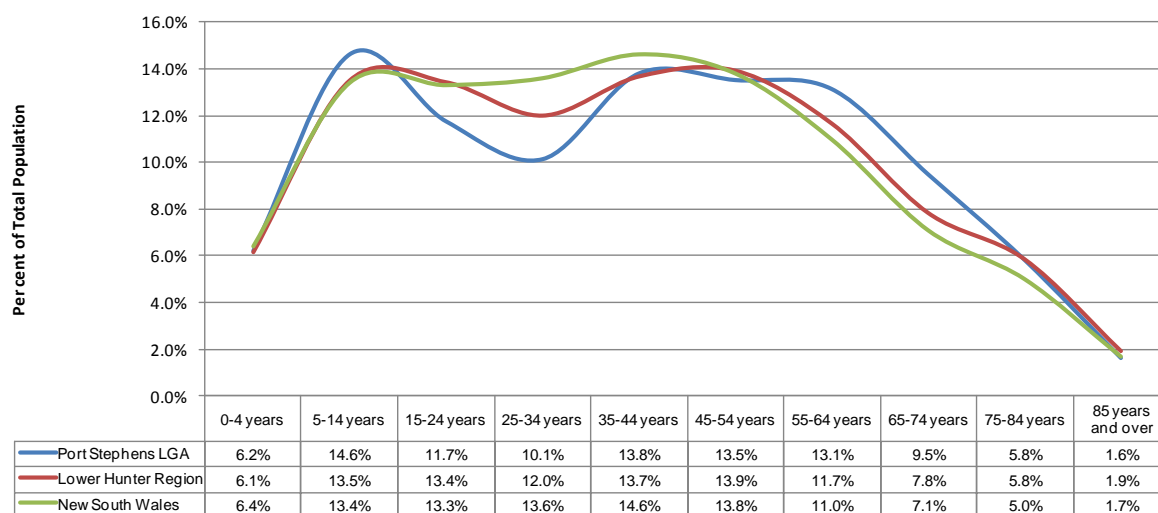
1.1 Population

With a population of 65,464 people in June 2008, Port Stephens LGA accounts for 12 per cent of Lower Hunter residents. The Port Stephens Economic Development Strategy (p29) makes the following observations about residents of the LGA:

- Port Stephens has a significant retired population (above the NSW State average), with people moving to the area for lifestyle and amenity reasons, while still being relatively close to the facilities and services of Newcastle and Sydney. The Peninsulas have a higher concentration of retirees compared with other parts of the LGA
- Young families are also attracted to the area for lifestyle reasons and because of affordable housing, and tend to be located in communities like Medowie, Tilligerry and Raymond Terrace. RAAF postings also bring families into the broader region and they tend to live in Port Stephens, Newcastle or Maitland

These characteristics are reflected in the age structure of the population as shown in Figure 1. In comparison to the NSW average and to a slightly lesser extent the Lower Hunter region, Port Stephens has a higher concentration of children and older people.

Figure 1. Population Age Structure, 2006



Source: ABS Census, 2006

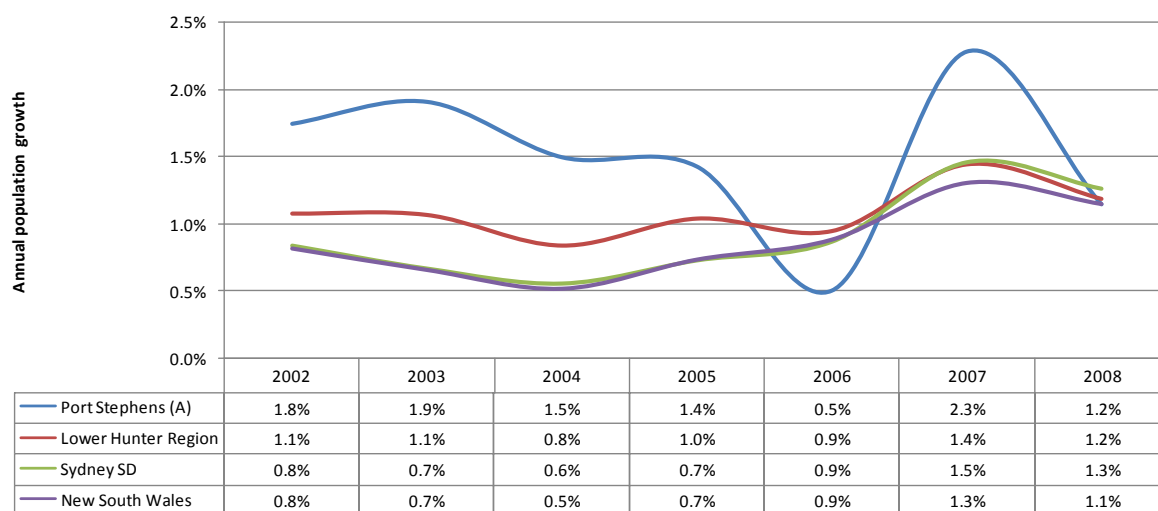
The Strategy also notes that major population concentrations in 2006 were as follows:

- Raymond Terrace 13403 or 22 per cent
- Medowie /Ferodale/Campvale 8380 or 14 per cent

- Salamander Bay/Soldiers Point/Taylors Beach 5394 or 9 per cent
- Lemon Tree Passage/ Mallabulla/ Oyster Cove/ Tanilba Bay 5835 or 10 per cent
- Nelson Bay 4113 or 7 per cent
- Tomaree Planning District 22,389 residents or 37 per cent

Aside from a small dip in 2006, the population growth across Port Stephens LGA has been very strong over the past six years. The total growth over this period was 11.0 per cent, compared to 6.6 per cent in the Lower Hunter Region as a whole and 6.2 per cent in New South Wales, over the same period. Population growth has also been very strong in the neighbouring LGA of Maitland which experienced an increase of 19.7 per cent over this period.

Figure 2. Annual Population Growth

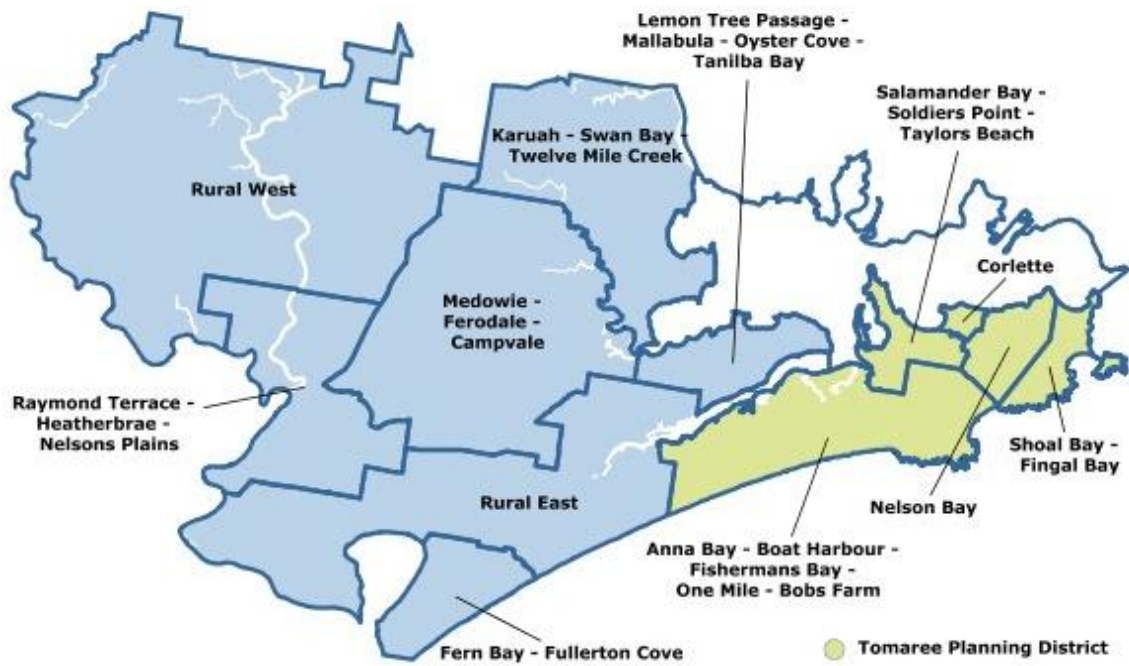


Source: ABS, 2009 'Regional Population Growth Australia 2007-08' (cat. no. 3218.0)

Future population growth is expected to continue to remain strong. Population forecasts prepared for Council by .id show that the population of Port Stephens will reach 92,371 by 2031. The fastest growing planning districts, both in nominal and percentage terms are 'Fern Bay - Fullerton Cove Medowie - Ferodale - Campvale', 'Raymond Terrace' and 'Heatherbrae - Nelsons Plains'. A map of the Port Stephens Planning Districts is shown in Figure 3.

The aggregate .id forecast population projections are not dissimilar, although slightly more conservative in the later years, to the most recent NSW Government population projections produced by the Transport Data Centre. The two sets of projections are shown in Table 2.

Figure 3. Port Stephens Planning Districts



Source: Port Stephens Council website (2010)

Table 1. Population forecast by planning district

	2009	2011	2016	2021	2026	2031
Anna Bay - Boat Harbour - Fishermans Bay - One Mile - Bobs Farm	5,503	5,596	5,986	6,485	6,865	7,186
Corlette	4,491	4,657	5,176	5,337	5,402	5,481
Fern Bay - Fullerton Cove	1,906	2,396	3,569	4,459	4,912	5,211
Karuah - Swan Bay - Twelve Mile Creek	1,520	1,574	1,716	1,851	1,980	2,081
Lemon Tree Passage - Mallabula - Oyster Cove - Tanilba Bay	6,423	6,506	6,841	7,188	7,503	7,760
Medowie - Ferodale - Campvale	8,858	8,923	9,637	11,346	13,296	15,167
Nelson Bay	5,522	5,724	6,256	6,769	7,261	7,745
Raymond Terrace - Heatherbrae - Nelsons Plains	13,364	13,346	14,772	16,716	19,045	21,380
Rural East	2,383	2,395	2,430	2,470	2,528	2,581
Rural West	5,225	5,287	5,442	5,658	5,911	6,203
Salamander Bay - Soldiers Point - Taylors Beach	6,318	6,432	6,635	7,003	7,422	7,833
Shoal Bay - Fingal Bay	3,372	3,394	3,448	3,543	3,640	3,743
<i>Tomaree Planning District</i>	<i>25,206</i>	<i>25,803</i>	<i>27,501</i>	<i>29,137</i>	<i>30,590</i>	<i>31,988</i>

Source: .id (2009)

Table 2. Port Stephens LGA population forecast, .id and TDC comparison

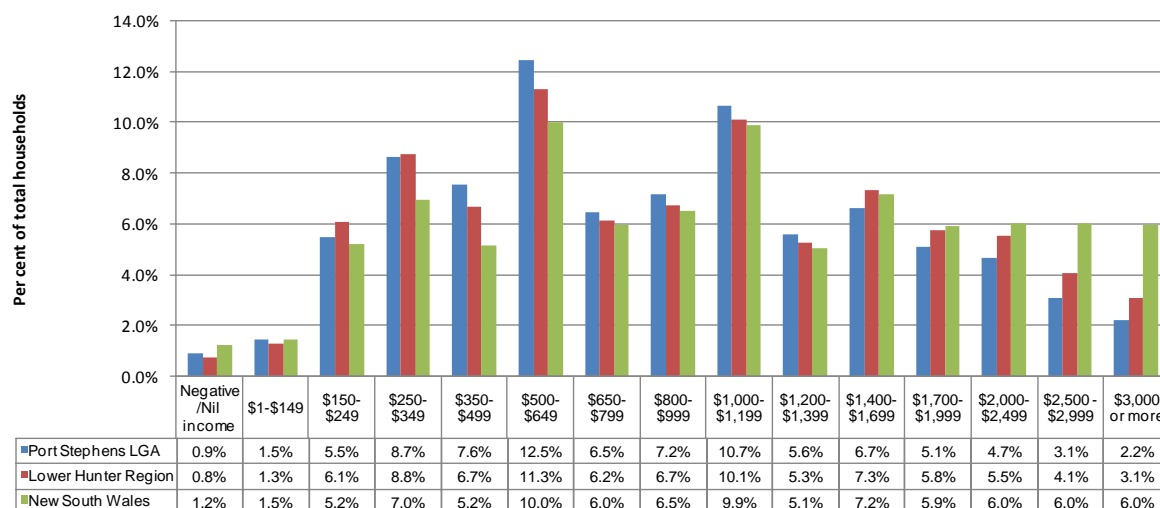
	2011	2016	2021	2026	2031
.id	66,230	71,908	78,825	85,765	92,371
TDC	68,269	73,230	78,055	82,585	86,636

Source: .id (2009) and Transport Data Centre (2009)

1.2 Household Income

The distribution of household income in Port Stephens is more heavily weighted to the lower end of the income spectrum than it is in either the Lower Hunter Region or New South Wales.

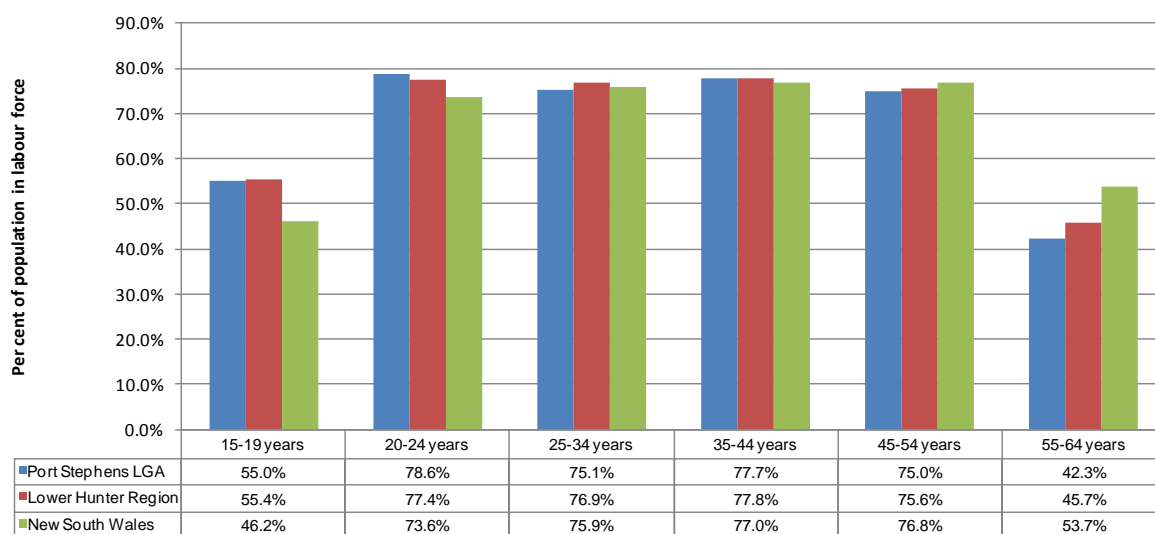
Figure 4. Distribution of Household Income



Source: ABS Census, 2006

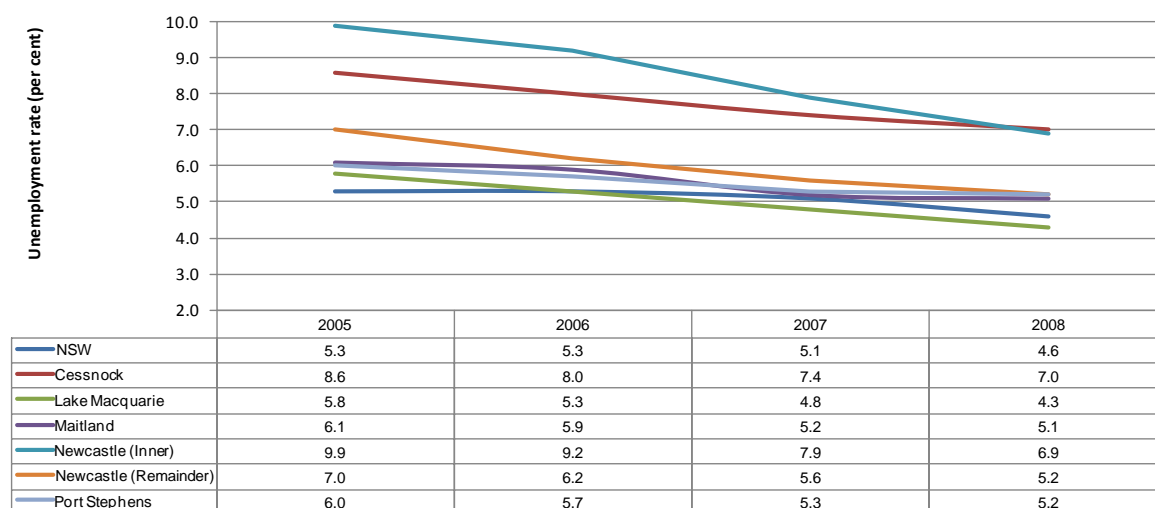
1.3 Labour Market Statistics

The overall participation rate in Port Stephens LGA is lower than that of the Lower Hunter Region and New South Wales. This is likely to be due to early retirees in the area as indicated by the particularly low participation rate of the 55-64 years age bracket (0)

Figure 5. Participation Rate

Source: ABS Census, 2006

The unemployment rates over the four years to June 2008 for each of the LGAs in the Lower Hunter Region and for New South Wales are shown in Figure 6. The unemployment rate in Port Stephens LGA over the past four years has been on par with that of Maitland LGA. It is slightly above the NSW average. Compared to the other areas, the unemployment rate has not fallen as sharply in Port Stephens over the most recent two years.

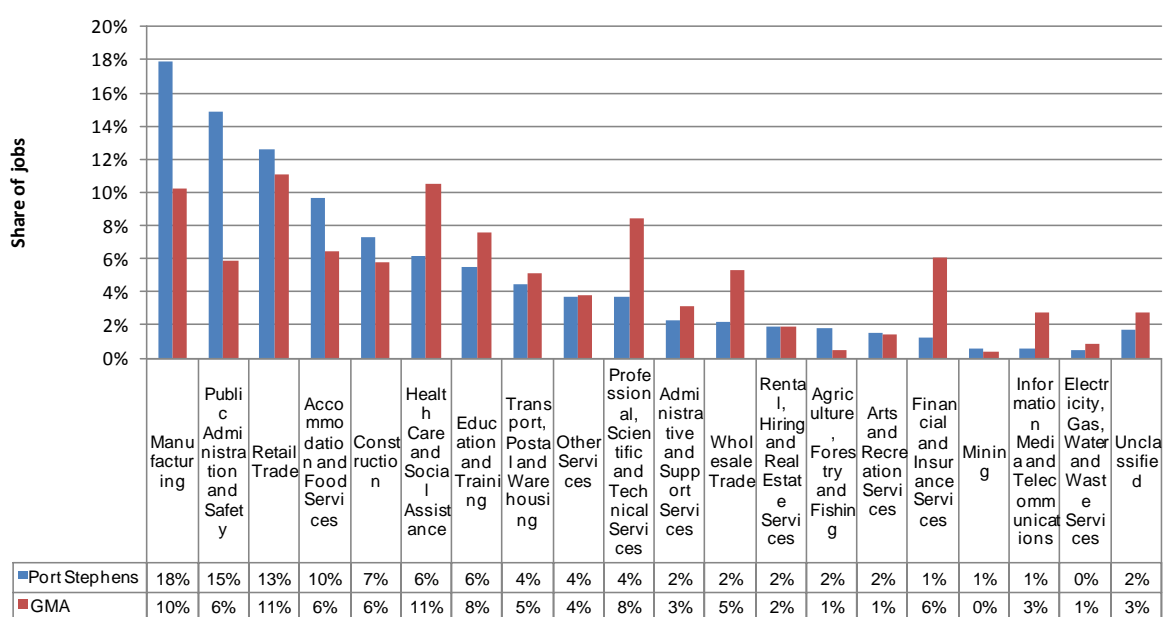
Figure 6. Unemployment rate, as at 30 June

Source: Department of Education, Employment and Workplace Relations, Small Area Labour Market Statistics, Various Years

1.4 Industry Profile

In the Port Stephens LGA the most significant sectors in employment terms are Manufacturing, Public Administration and Safety, Retail Trade and Accommodation and Food Services (Figure 1). These reflect two of the area's important assets, namely tourism (particularly around Nelson Bay) and the presence of the RAAF base in Williamstown. They also reflect the dominance of population serving industries which are concentrated in Raymond Terrace.

Figure 7. Employment by Industry (2006)



Source: Transport Data Centre 2009

Looking in finer detail at the types of manufacturing industries, the largest employers are 'Primary Metal and Metal Product Manufacturing' (1,572 jobs) and 'Machinery and Equipment Manufacturing' (1,006 jobs).

Location quotient analysis can be used to show relative employment specialisation of an area compared with a chosen benchmark area. A location quotient (LQ) which is greater than 1 highlights a relative specialisation in that sector. Applied to manufacturing industries in Port Stephens compared to the Greater Metropolitan Area (Table 3), specialisations are revealed in:

- 'Primary Metal and Metal Product Manufacturing' (LQ of 3.74)
- 'Transport Equipment Manufacturing' (LQ of 2.13)
- 'Machinery and Equipment Manufacturing' (LQ of 1.57)
- 'Fabricated Metal Product Manufacturing' (LQ of 1.32)
- 'Wood Product Manufacturing' (LQ of 1.26)

These industries can be described as heavy manufacturing industries. They typically require large lots, with good access for heavy vehicles. They are also generally associated with significant negative externalities and must, therefore, be located some distance from residential areas. Risk of land, air and water contamination is also associated with heavy manufacturing and this must be properly mitigated.

Table 3. Manufacturing Specialisation

Industry	LQ	jobs
Primary Metal and Metal Product Manufacturing	3.71	1,572
Transport Equipment Manufacturing	2.13	493
Machinery and Equipment Manufacturing	1.57	1,006
Fabricated Metal Product Manufacturing	1.32	391
Wood Product Manufacturing	1.26	216
Non-Metallic Mineral Product Manufacturing	0.65	130
Furniture and Other Manufacturing	0.62	398
Polymer Product and Rubber Product Manufacturing	0.28	60
Textile, Leather, Clothing and Footwear Manufacturing	0.22	49
Food Product Manufacturing	0.14	86
Basic Chemical and Chemical Product Manufacturing	0.14	36
Petroleum and Coal Product Manufacturing	0.09	3
Beverage and Tobacco Product Manufacturing	0.07	7
Printing, including the Reproduction of Recorded Media	0.04	11
Pulp Paper and Converted Paper Product Manufacturing	-	0
Total		4457

Source: Transport Data Centre 2009