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Abstract
The sea change phenomenon – the population movement from metropolitan areas or inland regional centres to coastal regions – has captured increasing attention from academics and policy makers in Australia. In this paper, I employ an economic perspective to investigate the relationship between tourism and the local economic development in the sea change communities. Through examining the economic bases of 15 representative sea change communities across Australia in 2001-2006, I find that the dominant role of tourism in driving the Australian coastal economy has been strengthening overall. Some associated patterns are identified between the importance of tourism in driving the local economies and the typology of sea change communities determined by their distances from the metropolitan centres and population sizes. Another finding is the strong potential of cultural and recreational services to become future economic driver of Australian sea change communities.

Keywords
Tourism; economic driver; sea change communities; Australia

Measuring Tourism as the Economic Driver of Australian Sea Change Communities

Introduction

'Sea change' is now in Australian lexicon. Used in a metaphorical sense, it describes the population movement from metropolitan areas and larger regional cities to attractive and high amenity localities on the coast (Burnley & Murphy, 2004). Its popularity as well as cultural symbolism was partially attributed to the ABC TV series *Sea Change* in 1998-2001, which depicted an escapist myth from city pressure in a small coastal community. In the recent decade, an increasing amount of scholarly debates, press coverage, and political initiatives has emerged to address the phenomenon, its motivations and consequences. Scholarly debates include whether sea change makes a 'big shift' or 'little shift' (K. O'Connor, 2001; Bernartd Salt, 2001), is lifestyle-motivated or opportunity-motivated (K. O'Connor, 2001; Stimson & Minnery, 1998), is a 'depopulation of the bush' and migration from regional centres or a move from capital metropolitan areas (Smith & Doherty, 2006).

One important component of the sea change discourse is the relationship between tourism and the sea change communities – the coastal communities which are witnessing significant population growth. It is recognised that a dynamic and recursive relationship exists between tourism and its wider context where it simultaneously influences and is being influenced by a range of socio-political, economic and physical conditions (Dredge, 2001). One form of the relationship is labelled as 'tourism urbanisation' – a special form of urbanisation due to its consumption pressure, its socially selective character and spatially distinctive ribbon-style small settlements and small nodes (Mullins, 1991). Another form of the relationship is seen in the lifestyle-led opportunities out of rural tourism to capitalise on the Australian lifestyle shift through 'place marketing' (Walmsley, 2003). One negative form of relationship is related to the aesthetic degradation and social inequality in the pursuit of an idyll lifestyle (Nick Osbaldiston, 2010).

In this paper, I employ an economic perspective to investigate the relationship between tourism and Australian sea change communities. Through examining the economic development in 15 representative sea change communities across Australia in a systematic manner, I aim to find out to what extent tourism has played a role as the economic driver of the sea change communities, and how this economic driver's role has shifted over time. The next section is a literature overview on sea change communities and tourism, followed by the two sections on methods and results. The last two sections offer discussions and conclusions.

Sea Change Communities and Tourism

As a demographic phenomenon, sea change is not something new, nor is something unique in Australian context. The shift that the demographic dominance of the large cities appeared to be offset by faster growth in non-metropolitan or remote areas commenced in Australia since the 1970s, and similar concurrent *population turnaround* was witnessed in Western industrialised nations where non-metropolitan areas captured a higher share of national population growth than the big cities did (Burnley & Murphy, 2004). In the latter part of the 20th century, population growth in

Australia was most rapid in the coastal outer metropolitan areas, away from the older parts of the metropolitan centres (Harvey & Caton, 2003). Comparing the population growth rates in Australian capital cities and their coastal regions in 1971-1991 indicates that the coastal regions had much higher rates than the metropolitan areas (see Table 1).

[insert **Table 1** here]

In order to capture the increasing influence of sea change phenomenon in shaping Australian lifestyle, demographer Bernard Salt (2003) describes sea change as constituting a 'third culture', a culture of the beach, distinct from the city and the bush. Osbaldiston (2010) extends the cultural meaningfulness by arguing a dichotomous relationship of sea change phenomenon: while metropolitan areas are perceived as dull, stressful and degrading, the country and beach are sacralised through narratives of peace, quiet and serenity. At a practical level, some scholarly efforts have been made as to what factors have been motivating people to make such a lifestyle change. Burnley and Murphy (2004) classify the sea changers into two broad groups: the 'free agents' who more or less make a free choice to leave the metropolis, and the 'forced relocators' who to some extent are pushed out of the city because of the high costs of living there. An important cohort of the former group is comprised of retirees, who are attracted by the lifestyle and low-cost living in the coastal areas which are not available in big cities. The latter group are those who are forced to leave from the cities to settle in coastal areas because they cannot afford the living costs, especially housing in cities. These active and passive choices of moving to coastal areas can be vividly described in a combination of 'push' and 'pull' factors: 'push' factors are those that encourage people to leave a region, while 'pull' factors attract people to a region (ABS, 2004). Typical 'push/pull' factors for sea change movement can be climate, housing, employment, lifestyle, and family and friends.

Some new features are emerging in the sea change phenomenon. A report studying the coastal population movement in New South Wales (NSW) state summarises three clusters of such factors: the largest cluster of reasons are environment related (a better environment to live, raise a family or retire); the second largest cluster of factors are focused on employment and business opportunities (this reflects a large majority of movers are in the workforce); the third cluster of migration motivation relates to housing affordability (only a small percentage) (Highwood Environment & Planning Consultants, 2004). The fact that employment and business opportunities constitute the second largest cluster of factors for sea change movement is meaningful, though the result was based on NSW state only. A study based on Gold Coast, Queensland, attests similar conclusion by finding that employment and economic conditions became the single most important reason for moving there since the early 1990s (Stimson & Minnery, 1998). These findings counter the conventional perception of sea changers as mostly retirees seeking for lifestyles change in the coastal areas, a process dubbed as 'lifestyle motivated counterurbanisation' (Walmsley, Epps, & Duncan, 1998). Increasingly non-aged populations are moving to the coastal area to live and work. Statistics reveal that four out of five people who moved to a high growth coastal region during the year prior to the 2001 census were aged less than 50 years, and had better qualifications and higher labour force participation (ABS, 2004).

The numerous sea change communities in Australia differ from each other in terms of location, demography, socio-economic indicators and local cultural settings.

Some scholarly efforts have been made to provide a typology of them. Burnley and Murphy (2004) broadly divide them into two types according to their distance from big cities: one type of 'peri-metropolitan regions' are relatively close to metropolitan cities; the second type of 'high amenity growth regions' are more remote. They argue that the population growth of both types of sea change communities is influenced by the same drivers, that is, people move there either as 'free agents' or 'forced relocators'. This broad typology based on the distances from metropolitan cities only is not sufficient to capture the diversity of the sea change communities. Gurran and Blakely (2007) provide a more sophisticated set of typology of the sea change communities, using distance from metropolitan centre and population size, which includes five 'ideal types': coastal commuters, coastal gateways, coastal cities, coastal lifestyle destinations, and coastal hamlets (next section lists the details of this typology). Contrary to the argument for the same drivers of population growth for different types of sea change communities by Burnley and Murphy (2004), results from a resident survey carried out by Blakely et al (2010) reveal that the motivations for moving to coastal regions are associated with the types of communities.

The sea change phenomenon has important implications for local economic development, especially tourism. The local economic base of sea change communities has been disproportionately reliant on tourism-related industries. In effect, the local tourist resources constitute partial motivations for the population movement towards there. A study by Stimson et al (2003) identifies four clusters of community opportunity or advantage among large regional cities and towns (with population of more than 10,000 in 1996 census) in Australia: mining-based opportunity; tourism-based opportunity; service-based opportunity; extractive/transformative-based opportunity. Of the four clusters, it is found out that the cluster of communities with tourism-based opportunity are mostly located in coastal area, and the cluster of communities with tourism-based opportunity demonstrated much stronger population and employment growth rates in 1986-1996 compared with the other three clusters of communities with opportunities. These findings are a testimony of the reciprocity of the tourism development and sea change phenomenon in Australian coastal regions.

However, tourism means more than opportunities for the sea change communities, as generally seen in the demand for accommodation, meals, retail services, construction and property, and business and employment opportunities. Tourism brings with it challenges for local planning and management. While generating revenues from their local consumptions, visitors do not contribute to the cost of public infrastructures. There is pressure for tourism-based communities to continue to renew and upgrade tourism infrastructure to remain competitive tourism destinations (Gurran, Squires, & Blakely, 2005). Social and environmental challenges also apply. Tensions between tourists and local residents might occur in places where parochialism sees visitors as a threat to local community amenity and cohesion. Social impacts associated with tourism may be more acute in smaller settlements which can be 'swamped' by high visitor numbers, leading to the hostility of local residents (Walmsley, 2003). Environment challenges result from the fact that not all tourism activities have been near the centres of population, but have occurred in all but the most remote locations (Harvey & Caton, 2003). In addition, environmental issues were downplayed in relation to the perceived economic and cultural benefits in local resident perception (Dyer, Gursoy, Sharma, & Carter, 2007). Economically, tourism indeed constitutes important source of income and employment for many communities with high amenity. However, tourism should not be viewed as a panacea for economic growth,

since its economic benefits are often limited because of the seasonal, low skilled, poorly paid and part time nature of much employment in the tourism-related industries (Gurran, Squires, & Blakely, 2006). The impacts of tourism are the highest for small and remote sea change communities, where seasonality can represent significant changes to population composition (Smith & Doherty, 2006).

The following sections provide a systematic examination on the role of tourism in driving the local economy of Australian sea change communities, and how its driving role has shifted over time.

Methods, Cases and Data

I selected 15 Australian coastal communities as the study cases to measure the role of tourism in driving the local economy. These 15 coastal communities are Australian local government areas (LGAs) across the major states of Australia – New South Wales (NSW), Victoria (VIC), Queensland (QLD), South Australia (SA), and West Australia (WA) – and all are experiencing the sea change phenomenon to different degrees (see Table 1). The typology of these communities is based on the categorisation standards of Australian coastal communities developed by Gurran and Blakely (2007, pp. 116-122): using distance from metropolitan centre and population size as the primary factors, the coastal communities are classified into these categories: Coastal Commuters – suburbanised satellite communities in peri metropolitan locations; Coastal Getaways – small to medium settlements and groupings of settlements within approximately three hours drive of a capital city; Coastal Cities – substantial urban conurbations (populations above 100,000) situated beyond the state capitals; Coastal Lifestyle Destinations – predominantly tourism and leisure communities, located more than three hours drive of a capital city; Coastal Hamlets – small, remote coastal communities often surrounded by protected natural areas, with populations below 15,000 people and situated more than three hours drive of a capital city.

[insert **Table 2** here]

I used the Location Quotient (LQ) technique to measure tourism as the economic driver of these sea change communities. The LQ analysis is widely used 'to identify the concentration of an industrial sector in a local economy relative to a larger reference economy' (Blakely & Bradshaw, 2002, p. 122). Employment is the most used variable in the LQ analysis which defines a ratio of employment shares: the local industry's share of total local employment compared with the industry's employment share in a wider reference region (regional, national, or even international) (Klosterman, 1990). An LQ > 1 indicates a higher than average degree of specialisation in that sector locally compared with the reference region, and is interpreted as an indicator of concentration and competitive advantage (Spencer, Vinodrai, Gertler, & Wolfe, 2010). According to the economic base theory assumes that a local economy has two sectors: 1) a basic or non local sector and 2) a non basic or local sector (Klosterman, 1990), the basic sector industries have significantly higher concentration of employment relative to the size of the total labour force (LQ > 1) and thus form the economic base of the local economy, or local economic drivers.

Applying the economic base theory and the LQ technique to find out to what extent tourism is the economic driver of Australian sea change communities and how its role as the economic driver has shifted was dissected into the following steps:

1. I collected the 1996 and 2006 Australian census data on industry of employment for all the coastal LGAs and the states where they are located from the Australian Bureau of Statistics (ABS). The industry of employment data were based on the place of work, and were tabulated by the industry divisions of the Australian and New Zealand Standard Industrial Classification (ANZSIC) 2006.

2. I calculated the LQs of all the industries (industry divisions of ANZSIC 2006) respectively in 1996 and 2006 for all the coastal LGAs by the equation: $LQ_i = {}^{e_i}\big/_{e_T} \div {}^{E_i}\big/_{E_T}$ (e_i = employment in industry division i in certain LGA, e_T = total employment in certain LGA, E_i = employment in industry subdivision i in the state where the LGA is located, E_T = total employment in the state where the LGA is located), and calculated their LQ changes in 2001-2006 as well.

3. Based on the LQs in 2006 and LQ changes in 2001-2006, I examined all the industries for the 15 coastal LGAs and identified their economic drivers (LQ > 1 in 2006). Two sets of classifications were produced: 1) classification of economic drivers by LGAs; 2) classification of economic drivers by industry divisions. The classification standards are based on the LQs of the economic drivers in 2006: very strong economic drivers (LQ > 2); strong economic drivers (2 > LQ > 1.5); standard economic drivers (1.5 > LQ > 1). Thus the associated patterns could be investigated between the typologies of the coastal communities and the typologies of the local economic drivers with regard to tourism-related industries as local economic drivers.

4. I aggregated all the industries of employment data of the 15 sea change LGAs as well as the states where the LGAs are located, and used the following standards (see Table 3) to classify the economic drivers and non economic drivers of the aggregated industries. I plotted all the aggregated industries of employment in the coordinate simultaneously conveying information about the sizes of employment (in 2006), the LQs (in 2006), and the LQ changes (2001-2006) by aligning the LQ changes along the X axis, aligning the LQs along the Y axis and making bubble sizes proportional to the employment shares. This plotting helped identify the roles of different industries in the coastal communities' economy in a static (in 2006) and dynamic (in 2001-2006) manner, and capture a holistic picture of tourism as the economic driver of Australian sea change communities.

[insert **Table 3** here]

Results

The results are displayed in three modes: 1) classification of economic drivers by sea change LGAs; 2) classification of economic drivers by industry divisions; 3) classification of aggregated industries of employment for all sea change LGAs.

Classifications in mode 1 and mode 2 resulted from implementation of the step 3 and its classification standards of economic drivers as described in the research methods. The calculated results of economic drivers of the sea change LGAs, on which the two modes of classification are based, are listed in Appendix 1. Of the economic drivers (LQ > 1), only those industries with employment shares more than 5 per cent in 2006 were included, so that the listed economic drivers have considerable employment base in the local economy.[1] Classifications in mode 3 resulted from implementation of the step 4 and its classification standards of aggregated economic drivers and non economic drivers as described in the research methods. The calculated results of aggregated industries of employment of all sea change LGAs, on which the mode 3 classification is based, are listed in Appendix 2. In the three modes of displaying results, tourism or tourism-related industry divisions (ANZSIC 2006) – Accommodation, Cafes and Restaurants; Retail Trade; and Cultural and Recreational Services – are italicised for highlighting.

Mode 1 classification (see Table 4) indicates that each of the sea change LGAs has various numbers of industry divisions as economic drivers, and each of the sea change LGAs has various numbers of industry divisions in the category of standard economic drivers (1.5>LQ>1), but not all sea change LGAs have industry divisions in the other two categories of very strong economic drivers (LQ>2) and strong economic drivers (2>LQ>1.5). Each of the sea change LGAs has at least one tourism or tourism-related industry division in the category of standard economic drivers (1.5>LQ>1). Two thirds of the sea change LGAs have tourism or tourism-related industry divisions in either of or both of the categories of very strong economic drivers (LQ>2) and strong economic drivers (2>LQ>1.5). That is to say, for all the sea change LGAS, tourism makes part of their economic base, and tourism industries constitute the local economic drivers to different degrees.

[insert **Table 4** here]

Mode 2 classification (see Table 5) demonstrates a dominant role of tourism or tourism-related industries as the economic drivers of the sea change LGAs as measured by quantity (number of LGAs) and degree (classification of economic drivers), surpassing any other category of industry divisions. More than half (53 per cent) of the sea change LGAs have Accommodation, Cafes and Restaurants as the very strong economic driver (LQ>2); 13 per cent of the sea change LGAs respectively have Retail Trade, and Accommodation, Cafes and Restaurants as strong economic drivers (2>LQ>1.5); 73 per cent of the sea change LGAs have Retail Trade as standard economic driver (1.5>LQ>1) while 13 per cent of the sea change LGAs have Accommodation, Cafes and Restaurants as standard economic driver (1.5>LQ>1). In addition, more than half (53 per cent) of the LGAs have Construction as an economic driver industry, reflecting a direct link with sea change phenomenon.

[insert **Table 5** here]

[1] One industry's status as the economic driver of the LGA's local economy is defined by its LQ in a relative sense, that is, relative to the industry's status in the state. It is important to use another important variable employment share to measure a local economy's economic drivers. There are industries with very high LQs, but very small employment sizes. For example, the industry division of Electricity, Gas and Water Supply had an LQ of 1.75 in 2006 in Wyong, however its employment share was 1.46 per cent – too low an employment share to justify its status as an economic driver. So, in measuring the economic drivers, only industry divisions with LQ > 1 and employment share > 5 per cent in 2006 were included.

Mode 3 classification (see Figure 1) indicates a dominant role of tourism or tourism-related industries as the economic drivers in the aggregated economy of all sea change LGAs and a growing trend of such a dominance. The industry divisions of Accommodation, Cafes and Restaurants, and Retail Trade are top two economic drivers as measured by their highest and the second highest LQs (respectively 1.44 and 1.26) in the aggregated economy of all sea change LGAs. Retail Trade was the largest industry division as measured by employment share, accounting for 19 per cent of total employment in 2006, and the industry division of Accommodation, Cafes and Restaurants accounted for 7 per cent of total employment. Both industry divisions enjoyed growth in LQs and employment shares in 2001-2006. Though it was not classified as an economic driver, another tourism industry division Cultural and Recreational Services witnessed very significant LQ growth in 2001-2006 (4.5 per cent), only second to the industry division of Property and Business Services. The quite high LQ (0.92) and the strong LQ growth trend of the industry division Cultural and Recreational Services indicate its strong potential as a future economic driver for the sea change LGAs, bringing about new changes to their tourism-dominated economic base.

[insert **Figure 1** here]

Discussion

Some associated patterns can be identified between the typologies of the coastal communities and the classifications of economic drivers with regard to tourism industries. The sea change LGAs in the categories of 'coastal commuters' and 'coastal cities' are suburbanised satellite communities in peri or exurban metropolitan locations, or substantial urban conurbations, as indicated in their considerable population densities (162 persons per km² for 'coastal commuters' LGAs, and 191 persons per km² for 'coastal cities' LGAs on average). For these two categories of sea change LGAs, the economic driver industries (including tourism industries) are concentrated in the category of standard economic drivers (1.5>LQ>1), with very few economic driver industries in the category of strong economic drivers (2>LQ>1.5), and no economic driver industries in the category of very strong economic drivers (LQ>2) at all. The sea change LGAs in the categories of 'coastal getaways', 'coastal lifestyle destinations' and 'coastal hamlets' are small to medium towns, or remote rural communities, as indicated in their quite low population densities (72 persons per km² for 'coastal getaways' LGAs and 19 persons per km² for 'coastal lifestyle destinations' LGAs on average, and 5 persons per km² for 'coastal hamlets' LGA). These three categories of sea change LGAs (coastal getaways, coastal lifestyle destinations, coastal hamlets), compared to the previous two categories of sea change LGAs (coastal commuters, coastal cities), have more numbers of economic driver industries in the categories of standard economic drivers (1.5>LQ>1) and very strong economic drivers (LQ>2), with a few in the category of strong economic drivers (2>LQ>1.5). For these three categories of sea change LGAs, the tourism-related industry division of Accommodation, Cafes and Restaurants tends to fall in the category of very strong economic drivers (LQ>2), together with the other industry division of Agriculture, Forestry and Fishing.

The economic base and the role of tourism in the local economy of the sea change communities are associated with their distance from metropolitan centres and

population sizes, which are two primary factors used to classify sea change communities in Australia (Gurran & Blakely, 2007). Remoter and smaller sea change communities tend to be more reliant on tourism to drive the local economies, and their economic bases tend to be specialised within few industries like tourism and primary production of agriculture. Comparatively, sea change communities which are closer to metropolitan centres and more populous are less reliant on a few specialised industries for local economic development, and the roles of the local economic drivers tend to be much weaker. Their economic development is subjective to the influence of the metropolitan centre in their vicinity. O'Connor (2004) describes their linkages in the way 'the coast as the creature of the metropolitan area', stating that the effect can be judged by the diminishing level of development along the coast with increased distance from metropolitan areas, and the linkages occur through commuters, retirees and second homebuyers. In the coastal communities close to a metropolitan centre, Retail Trade constitutes an important component of the tourism-related local economic base. One research based on southern suburban Sydney reveals that a lifestyle-linked restructuring is changing the retail industry, blurring the distinction between shopping and leisure in suburban areas (Walmsley, 2006). The blurred distinction between shopping and leisure is supposed to be more applicable to the coastal communities which are within the commuting distance of a metropolitan centre.

Tourism industries are dominant economic drivers in all sea change LGAs. The majority of sea change LGAs (87 per cent) have both industry divisions of Retail Trade, and Accommodation, Cafes and Restaurants as economic driver. Comparatively, the industry division Accommodation, Cafes and Restaurants plays a more dominant role in driving the local economies since 53 per cent of the sea change LGAs have it in the category of very strong economic drivers (LQ>2), while 73 per cent of the sea change LGAs have the industry division of Retail Trade in the category of standard economic drivers (1.5>LQ>1). The dominant role of tourism industries in driving the local economies is echoed by the economic base analysis of aggregated industries of employment for all the sea change LGAs, as seen in the top performance of industry divisions of Accommodation, Cafes and Restaurants, and Retail Trade. In addition, what is worth noting out of the analysis of aggregated industries of employment is the potential of industry division of Cultural and Recreational Services becoming an economic driver for sea change communities. Cultural activities and industries have a significant cumulative impact on the economic development in rural or nonmetropolitan Australia (Andersen & Oakley, 2008; Gibson, Waitt, Walmsley, & Connell, 2010).

Conclusion

Examining the economic bases of 15 representative sea change communities in 2001-2006 across Australia reveals that: 1) overall tourism remains to be the dominant driver of the local economy, and the dominant role has been strengthening; 2) there is an association between the tourism's role as local economic driver and the typology of sea change communities – the remoter a sea change community is from a metropolitan centre and the smaller its population size is, a more important role tourism is likely to play in driving the local economy; 3) there has been some new trend of tourism development as seen in the growing importance of cultural and recreational services in additional to traditional hospitality and retail services.

Appendix 1

Economic Drivers of Individual Selected Sea Change LGAs

Sea Change LGAs	Industry Divisions (ANZSIC 2006)	LQ Change (2001-2006)	LQ in 2006	Employment Share in 2006
Gosford	Health and Community Services	0.37%	1.62	17.90%
	Retail Trade	-2.96%	1.37	19.85%
	Accommodation, Cafes and Restaurants	-1.32%	1.13	5.76%
	Government Administration and Defence	33.34%	1.13	5.30%
Wyong	Retail Trade	3.59%	1.56	22.62%
	Accommodation, Cafes and Restaurants	-10.64%	1.20	6.13%
	Health and Community Services	7.02%	1.18	13.06%
	Manufacturing	6.61%	1.16	12.15%
	Education	-7.03%	1.16	8.89%
Great Lakes	Accommodation, Cafes and Restaurants	3.13%	2.21	11.32%
	Agriculture, Forestry and Fishing	-8.03%	1.94	5.53%
	Retail Trade	-4.91%	1.38	20.00%
	Construction	12.18%	1.31	9.43%
	Health and Community Services	3.57%	1.13	12.49%
Wollongong	Manufacturing	-6.97%	1.49	15.68%
	Education	-1.49%	1.33	10.17%
	Health and Community Services	2.09%	1.22	13.42%
	Retail Trade	-2.55%	1.01	14.63%
Eurobodalla	Accommodation, Cafes and Restaurants	-3.89%	2.16	11.04%
	Retail Trade	-2.04%	1.58	22.93%
	Health and Community Services	0.44%	1.18	13.05%
	Education	-6.76%	1.04	7.99%
Byron	Accommodation, Cafes and Restaurants	13.11%	2.45	12.51%
	Retail Trade	7.73%	1.32	19.12%
	Construction	-0.44%	1.12	8.10%
Clarence Valley	Agriculture, Forestry and Fishing	-14.80%	2.44	6.95%
	Government Administration and Defence	-0.74%	1.57	7.38%
	Accommodation, Cafes and Restaurants	5.64%	1.37	7.02%
	Retail Trade	-0.18%	1.28	18.47%
	Health and Community Services	-0.48%	1.19	13.09%
	Education	-6.18%	1.11	8.52%
Surf Coast	Agriculture, Forestry and Fishing	13.75%	3.22	9.30%
	Accommodation, Cafes and Restaurants	-5.47%	3.17	13.62%
	Construction	15.55%	1.71	12.65%
	Wholesale Trade	55.65%	1.34	7.37%
	Retail Trade	-14.91%	1.08	16.09%
Maroochy	Accommodation, Cafes and Restaurants	1.81%	1.51	8.08%
	Health and Community Services	-6.28%	1.24	13.41%
	Retail Trade	0.95%	1.23	18.65%
	Property and Business Services	21.49%	1.03	10.69%
Alexandrina	Agriculture, Forestry and Fishing	-9.75%	3.64	17.23%

	Accommodation, Cafes and Restaurants	22.73%	1.75	7.73%
	Construction	9.31%	1.11	7.36%
	Manufacturing	-2.50%	1.01	13.54%
Victor Harbor	Accommodation, Cafes and Restaurants	3.87%	2.12	9.40%
	Health and Community Services	8.18%	1.47	19.23%
	Retail Trade	-6.98%	1.42	21.27%
	Construction	4.43%	1.19	7.82%
	Agriculture, Forestry and Fishing	-15.66%	1.06	5.02%
Yankalilla	Agriculture, Forestry and Fishing	-6.97%	5.20	24.61%
	Accommodation, Cafes and Restaurants	33.92%	2.62	11.59%
	Construction	81.21%	1.33	8.75%
Wanneroo	Manufacturing	1.63%	1.58	15.99%
	Construction	0.81%	1.44	13.01%
	Retail Trade	6.47%	1.41	20.38%
	Education	5.02%	1.41	10.92%
	Wholesale Trade	-13.65%	1.19	5.48%
Augusta-Margaret River	Agriculture, Forestry and Fishing	2.99%	3.61	12.45%
	Accommodation, Cafes and Restaurants	3.70%	2.75	11.89%
	Manufacturing	-0.32%	1.36	13.75%
	Retail Trade	1.96%	1.12	16.09%
Busselton	Accommodation, Cafes and Restaurants	8.45%	2.52	10.90%
	Agriculture, Forestry and Fishing	-0.95%	2.14	7.38%
	Retail Trade	10.56%	1.37	19.78%
	Construction	-0.03%	1.11	9.96%

Notes:
1) Industries with employment shares more than or equal to 5% in 2006 are listed;
2) Industries in each category are sequenced according to their LQ changes (2001-2006).

Appendix 2

Aggregated Economic Drivers and Non Economic Drivers of All Selected Sea Change LGAs

Categories	Industry Divisions (ANZSIC 2006)	LQ Change (2001-2006)	LQ in 2006	Employment Share in 2006
Growing Economic Drivers	Construction	1.31%	1.00	7.77%
	Accommodation, Cafes and Restaurants	0.95%	1.44	6.94%
	Retail Trade	0.74%	1.26	18.61%
	Health and Community Services	0.34%	1.18	13.09%
Declining Economic Drivers	Personal and Other Services	-0.13%	1.01	3.69%
	Education	-2.09%	1.12	8.66%
Growing Economic Drivers	Property and Business Services	5.43%	0.98	11.19%
	Cultural and Recreational Services	4.37%	0.92	2.07%
	Transport and Storage	2.28%	0.91	0.74%
Declining Non Economic Drivers	Government Administration and Defence	-0.09%	0.89	2.88%
	Communication Services	-0.96%	0.88	4.30%
	Manufacturing	-2.45%	0.79	8.85%

	Finance and Insurance	-3.00%	0.75	3.79%
	Wholesale Trade	-4.96%	0.70	1.07%
	Agriculture, Forestry and Fishing	-6.88%	0.51	0.62%
	Electricity, Gas and Water Supply	-11.41%	0.69	3.14%
	Mining	-24.77%	0.64	2.61%

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Table 1 *Population Changes in Metropolitan Areas in Australia (1971-1991)*

Statistical Division[2]	Percentage Change
Sydney	21
Coastal Region	157
Melbourne	20
Coastal Region	202
Brisbane	53
Coastal Region	271
Adelaide	21
Coastal Region	327
Perth	63
Coastal Region	604
Hobart	19
Coastal Region	133
Darwin	110

Source: (Harvey & Caton, 2003, p. 127)

[2] The Statistical Division in the Australian Standard Geographical Classification (ASGC) defined by the Australian Bureau of Statistics is generally used to refer to the metropolitan areas of Australian capital cities.

Table 2 *Sea Change Community Cases*

States	LGAs	Population (in 2006)	Population Change (2001-2006)	Area (km²)	Density (persons per km²)	Community Typology
NSW	Gosford	158,157	0.84%	1,029	154	Coastal Commuters
	Wyong	139,801	5.27%	825	170	Coastal Commuters
	Great Lakes	32,766	5.51%	3,375	10	Coastal Lifestyle Destinations
	Wollongong	184,212	1.12%	714	258	Coastal Cities
	Eurobodalla	35,009	4.60%	3,422	10	Coastal Lifestyle Destinations
	Byron	28,766	0.28%	567	51	Coastal Lifestyle Destinations
	Clarence Valley	48,146	2.91%	10,441	5	Coastal Lifestyle Destinations
VIC	Surf Coast	21,771	7.59%	1,552	14	Coastal Getaways
QLD	Maroochy[3]	142,838	17.22%	1,163	123	Coastal Cities
SA	Alexandrina	20,715	15.40%	1,827	11	Coastal Getaways
	Victor Harbor	12,012	9.86%	385	312	Coastal Getaways
	Yankalilla	4,155	9.63%	751	6	Coastal Getaways
WA	Wanneroo	110,940	36.13%	686	162	Coastal Commuters
	Augusta-Margaret River	10,353	8.40%	2,242	5	Coastal Hamlets
	Busselton	25,354	13.64%	1,455	17	Coastal Getaways

Data source: www.abs.gov.au

[3] Maroochy Shire was amalgamated into the Sunshine Coast Regional Council together with Noosa Shire and Caloundra City in 2008, therefore Maroochy as a LGA did not exist afterwards. However, the data collection for this research occurred before 2008, so Maroochy remained to be a LGA in this article.

Table 3 *Classification of Basic and Non Basic Sectors*

	LQ ≥ 1*	LQ < 1
LQ Change ≥ 0*	Growing Economic Drivers	Growing Non Economic Drivers
LQ Change < 0	Declining Economic Drivers	Declining Non Economic Drivers

* To simplify the classification, cases with LQ=1 and LQ Change=0 are respectively converged with LQ>1 and LQ Change>0.

Table 4 *Classification of Economic Drivers by Sea Change LGA*

Sea Change LGAs	Very Strong Economic Drivers (LQ>2)	Strong Economic Drivers (2>LQ>1.5)	Standard Economic Drivers (1.5>LQ>1)	Community Typology (average density: persons per km²)
Gosford		Health and Community Services (▲)	*Retail Trade* (▼); *Accommodation, Cafes and Restaurants* (▲); Government Administration and Defence (▲)	Coastal Commuters (162)
Wyong		*Retail Trade* (▲)	*Accommodation, Cafes and Restaurants* (▼); Health and Community Services (▲); Manufacturing (▲); Education (▼)	
Wanneroo		Manufacturing (▲)	Construction (▲); *Retail Trade* (▲); Education (▲); Wholesale Trade (▼)	
Wollongong			Manufacturing (▼); Education (▼); Health and Community Services (▲); *Retail Trade* (▼)	Coastal Cities (191)
Maroochy		*Accommodation, Cafes and Restaurants* (▲)	Health and Community Services (▼); *Retail Trade* (▲); Property and Business Services (▲)	
Surf Coast	Agriculture, Forestry and Fishing (▲); *Accommodation,*	Construction (▲)	Wholesale Trade (▲); *Retail Trade* (▼)	Coastal Getaways (72)

	Cafes and Restaurants (▼)			
Alexandrina	Agriculture, Forestry and Fishing (▼)	*Accommodation, Cafes and Restaurants* (▲)	Construction (▲); Manufacturing (▼)	
Victor Harbor	*Accommodation, Cafes and Restaurants* (▲)		Health and Community Services (▲); *Retail Trade* (▼); Construction (▲); Agriculture, Forestry and Fishing (▼)	
Yankalilla	Agriculture, Forestry and Fishing (▼); *Accommodation, Cafes and Restaurants* (▲)		Construction (▲)	
Busselton	*Accommodation, Cafes and Restaurants* (▲); Agriculture, Forestry and Fishing (▼)		*Retail Trade* (▲); Construction (▼)	
Great Lakes	*Accommodation, Cafes and Restaurants* (▲)	Agriculture, Forestry and Fishing (▼)	*Retail Trade* (▼); Construction (▲); Health and Community Services (▲)	Coastal Lifestyle Destinations (19)
Eurobodalla	*Accommodation, Cafes and Restaurants* (▼)	*Retail Trade* (▼)	Health and Community Services (▲); Education (▼)	
Byron	*Accommodation, Cafes and Restaurants* (▲)		*Retail Trade* (▲); Construction (▼)	
Clarence Valley	Agriculture, Forestry and Fishing (▼)	Government Administration and Defence (▼)	*Accommodation, Cafes and Restaurants* (▲); *Retail Trade* (▼); *Health and Community*	

			Services (▼); Education (▼)	
Augusta-Margaret River	Agriculture, Forestry and Fishing (▲); *Accommodation, Cafes and Restaurants* (▲)		Manufacturing (▼); *Retail Trade* (▲)	Coastal Hamlets (5)

Notes:
1) Sea change LGAs of the same community typology classified in Table 2 are organised together;
2) Industries with employment shares more than or equal to 5% in 2006 are listed;
3) Industries are sequenced according to their LQ values in 2006;
4) Sign ▲ indicates LQ value growth in 2001-2006, and sign ▼ indicates LQ value decline in 2001-2006.

Table 5 *Classification of Economic Drivers by Industry Divisions*

Industry Divisions (ANZSIC 2006)	Very Strong Economic Drivers (LQ>2)	Strong Economic Drivers (2>LQ>1.5)	Standard Economic Drivers (1.5>LQ>1)	Total (LQ>1)
	No. of LGAs (Percentage of LGAs)			
Agriculture, Forestry and Fishing	6 (40%)	1 (7%)	1 (7%)	8 (53%)
Mining				
Manufacturing		1 (7%)	4 (27%)	5 (33%)
Electricity, Gas and Water Supply				
Construction		1 (7%)	7 (47%)	8 (53%)
Wholesale Trade			2 (13%)	2 (13%)
Retail Trade		2 (13%)	11 (73%)	13 (87%)
Accommodation, Cafes and Restaurants	8 (53%)	2 (13%)	3 (20%)	13 (87%)
Transport and Storage				
Communication Services				
Finance and Insurance				
Property and Business Services			1 (7%)	1 (7%)
Government Administration and Defence		1 (7%)	1 (7%)	2 (13%)
Education			5 (33%)	5 (33%)
Health and Community Services		1 (7%)	7 (47%)	8 (53%)
Cultural and Recreational Services				
Personal and Other Services				

Notes:
1) Industries with employment shares more than or equal to 5% in 2006 are listed;
2) Industries are sequenced according to their LQ values in 2006.

Figure 1 *Classification of Aggregated Industries of Employment for All Sea Change LGAs*