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Measuring tourism as the economic driver of Australian sea change communities

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The sea change phenomenon – the population movement from metropolitan areas or inland regional centers to coastal regions – has attracted increasing attention from academics and policy-makers in Australia. In this paper, we move from a demographic perspective to an integrative perspective to approach Australian sea change communities. We construct a new typology of the sea change communities, which reflects both population change and economic change. Through examining the economic bases of 15 representative sea change communities across Australia, we find that: (1) overall, tourism industries are the dominant local economic drivers, and the dominance has been strengthening; (2) the sea change communities differ from each other in the local economic drivers, and the determining factors include distance from the metropolitan center, population size, and population density; and (3) there is a new trend of growing importance of cultural and recreational services in driving the local economies.

Keywords: tourism; economic driver; sea change communities; Australia

Introduction

“Sea change” is now present within the Australian lexicon, although it also exists elsewhere as a demographic phenomenon. Used as a metaphor, it refers to the population movement from metropolitan areas and larger regional cities to attractive and high-amenity localities on the coast (Burnley & Murphy, 2004). The popularity of its use and cultural symbolism was attributed to the Australian Broadcasting Corporation TV series *Sea Change* in 1998–2001, which depicted an escapist myth from city pressure to a small coastal community. In the past decade, an increasing amount of scholarly debates, press coverage, and policy initiatives have emerged to address the phenomenon, including its motivations and consequences. The scholarly debates include whether sea change constitutes a “big shift” or “little shift” (O’Connor, 2001; Salt, 2001); is lifestyle-motivated or opportunity-motivated (O’Connor, 2001; Stimson & Minnery, 1998); and is a “depopulation of the bush” and migration from regional centers or a move from capital metropolitan areas (Smith & Doherty, 2006).

One major concern of the sea change discourse is the relationship between tourism and the sea change communities. A dynamic and recursive relationship exists between tourism and its wider context where it simultaneously influences and is being influenced by a range of sociopolitical, economic, and physical conditions (Dredge, 2001). The relationship is reflected in “tourism urbanization” – a special form of urbanization due

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to its consumption pressure, its socially selective character, and spatially distinctive ribbon-style small settlements and small nodes (Mullins, 1991); reflected in the life-style-led opportunities out of rural tourism to capitalize on the Australian lifestyle shift through “place marketing” (Walmsley, 2003); and reflected in the esthetic degradation and social inequality in the pursuit of an idyll lifestyle (Osbaldiston, 2010a).

In this article, we move from a demographic perspective to an integrative perspective to approach Australian sea change communities. We construct a new typology of the sea change communities, which reflects both population change and economic change. We then examine the economic bases of 15 representative sea change communities across Australia, to find out to what extent tourism industries have played the role of driving the local economies, and how their economic drivers’ roles have shifted recently. Following this introduction, the next two sections constitute a literature overview on Australian sea change communities and tourism. The fourth and fifth sections offer the aim and methods of this study. The last two sections provide findings and a concluding discussion.

Sea change communities

As a demographic phenomenon, sea change is not new, nor is it unique in an Australian context only. The population turnaround from metropolitan centers to non-metropolitan or remote areas has been observed at national, state, and local levels in Australia since the 1970s (Burnley, 1996; Curry, Koczberski, & Selwood, 2001; Hugo & Smailes, 1985; Smailes & Hugo, 1985). Although a slower pace was observed in the 1980s and early 1990s, the trends became more diversified, more complex, and much less predictable (Hugo, 1994; Hugo & Smailes, 1992); or the trends were fluctuating or cyclical (Burnley & Murphy, 2002). Similar population turnaround was observed in other Western industrialized nations where non-metropolitan areas captured a higher share of national population growth than the big cities did (Burnley & Murphy, 2002, 2004). The distinction is that, in the latter part of the twentieth century, population growth in Australia was most rapid in the coastal outer-metropolitan areas, away from the older parts of the metropolitan centers (Harvey & Caton, 2003).

The term “sea change” is used to connote people making a fundamental change in their lifestyles (Murphy, 2002). Salt (2003) refers to sea change as a “third culture,” a culture of the beach, distinct from that of the city and the bush. Osbaldiston (2010b) argues for a twofold nature of the sea change phenomenon: while metropolitan areas are perceived as dull, stressful, and degrading, the country and beach are sacralized through narratives of peace, quiet, and serenity. Alternatively, it reflects a culture associated with the consumption of lifestyles and environmental amenity, and the commodification of a rural ideal (Burnley, 1996; Curry et al., 2001).

Some scholars have tried to explain what factors motivate 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. The active and passive choices of moving to coastal areas can be described as 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).

Some studies have been carried out to identify the push/pull factors. Burnley (1996) identifies the pull factors as environmental and esthetic amenities, and the push factors

as rising housing costs and unemployment. A report on the coastal population movement in New South Wales (NSW) summarizes three clusters of sea change factors: the largest cluster is environment related (a better environment to live, raise a family, or retire); the second largest cluster focuses on employment and business opportunities (reflecting the fact that a large majority of movers are in the workforce); and the third cluster relates to housing affordability (only a small percentage) (Highwood Environment & Planning Consultants, 2004). It is worth noting that employment and business opportunities constitute the second largest cluster of factors. A study based on Gold Coast, Queensland (QLD), draws a similar conclusion that employment and economic conditions became the single most important reason for people moving there from the early 1990s (Stimson & Minnery, 1998).

These findings counter the conventional perception of sea changers as mostly retirees seeking lifestyle changes in the coastal areas, a process of “lifestyle motivated counter-urbanization” (Walmsley, Epps, & Duncan, 1998). Increasingly, non-aged populations are moving to the coastal areas to live and work. Four out of five people who moved to a high-growth coastal region during the year prior to the 2001 census were less than 50 years old, and they had better qualifications and higher labor force participation (ABS, 2004). Meanwhile, international migrants also joined the sea change movement. One out of five people who moved to Australian coastal areas in 2001–2006 were from overseas (Commonwealth of Australia, 2011).

The numerous sea change communities in Australia differ from each other in terms of location, demographic characteristics, socioeconomic indicators, and local cultural settings. Some scholars have tried to provide a typology of them. Burnley and Murphy (2004) broadly divide them into two types according to their distances from big cities: one type of “peri-metropolitan regions” is relatively close to metropolitan cities; the other type of “high amenity growth regions” is more remote. Gurran and Blakely (2007) provide another typology of sea change communities, using both distance from metropolitan center and population size. Their typology includes five “ideal types”: coastal commuters, coastal gateways, coastal cities, coastal lifestyle destinations, and coastal hamlets.¹ Both typologies are useful classification methods. However, using distance from urban centers and/or population size as criteria makes the classifications broad, and does not capture other aspects of the sea change communities, such as socioeconomic characteristics. The demographic and geographic attributes of the sea change communities have significant impacts on the local economy. It is necessary to incorporate the economic factor into classifying the sea change communities. In this study, we will propose a new typology based upon the dynamic factors of population change and economic change.

Amenity migration and tourism

The sea change phenomenon has multiplier effects on the local socioeconomic development (Burnley & Murphy, 2002; Gosnell & Abrams, 2011). The local economic base of sea change communities has traditionally been disproportionately reliant on tourism industries (Hu, Blakely, & Bista, 2012). In effect, the local tourist resources have motivated the population movement towards there, in a so-called “amenity migration” or “amenity-led migration” (Argent, Tonts, Jones, & Holmes, 2011; Bohnet & Moore, 2011; Gosnell & Abrams, 2011; Gurran, 2008; Gurran, Blakely, & Squires, 2007). A study by Stimson, Baum, and O’Connor (2003) identifies four clusters of community opportunity or advantage among large regional cities and towns (with populations of

more than 10,000 according to the 1996 census) in Australia: mining-based opportunity, tourism-based opportunity, service-based opportunity, and extractive/transformativ-based opportunity. Of the four clusters, the cluster of communities with tourism-based opportunity is mostly located in coastal areas, and demonstrated much stronger population and employment growth rates in 1986–1996 compared to the other three clusters. These findings provide a testimony of the reciprocity of tourism development and sea change phenomenon in Australian coastal regions.

However, tourism means more than opportunities for the sea change communities, as is generally understood in the increased 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 consumption, visitors do not contribute directly to the cost of public infrastructure. There is pressure for tourism-based communities to continue to renew and upgrade tourism infrastructure to remain competitive tourism destinations (Gurran, Squires, & Blakely, 2005); these communities are struggling to accommodate growing numbers of people with urban tastes and rural dreams in areas with governance structures and physical infrastructure designed for occasional tourists (Gurran et al., 2007).

Social and environmental challenges also exist. Non-permanent residents' place attachment is linked to positive behaviors, such as environmental conservation, volunteering, and support of local businesses (Kelly & Hosking, 2008). 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). In terms of environmental challenges, not all tourism activities have been near the centers of population, but rather have occurred in all but the most remote and environmentally sensitive locations (Harvey & Caton, 2003). Furthermore, environmental issues can be downplayed in relation to the perceived economic and cultural benefits in local residents' perceptions (Dyer, Gursoy, Sharma, & Carter, 2007).

Economically, tourism is an important source of income and employment for many communities with high amenity. However, tourism should not be viewed as a panacea for economic growth, as 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). Tourism has profound economic, cultural, social, and environmental implications for the local communities.

Aim

This study is a systematic analysis of tourism and the local economy in Australian sea change communities. We aim to advance the scholarship on the sea change phenomenon along two strands. First, we provide a new typology of Australian sea change communities, incorporating dynamic factors of population change and economic change. This typology will add to the existing typologies of the communities, according to their distances from big cities (Burnley & Murphy, 2004), or according to their distances from metropolitan center and population sizes (Gurran & Blakely, 2007). Second, we

employ an integrative perspective to approach Australian sea change communities to understand the local economies and the roles of tourism industries. An economic analysis presents a different angle from the existing literature that mostly approaches the sea change phenomenon from demographic, cultural, and social angles (Burnley & Murphy, 2004; Gurran, 2008; Osbaldiston, 2010b; Salt, 2003). Combining the economic changes with the demographic and geographic attributes provides a holistic understanding of the sea change communities.

Methods

We selected 15 Australian coastal communities to measure the roles of tourism in driving the local economies. The 15 coastal communities are local government areas (LGAs) across the major states in Australia: NSW, Victoria (VIC), QLD, South Australia (SA), and West Australia (WA) (see Figure 1). They are all experiencing the sea change phenomenon to different degrees; their demographic and geographic characteristics are representative of the vast number of sea change communities in Australia (see Table 1).

We used the Location Quotient (LQ) technique, which compares the sea change communities' share in a particular variable to their states' share in the same variable, to measure two sets of data. First, we used it to measure the population growth and the aggregate income growth in 2001–2006 using Australian census data, to classify the sea change communities into four categories. The classification criteria were adapted from

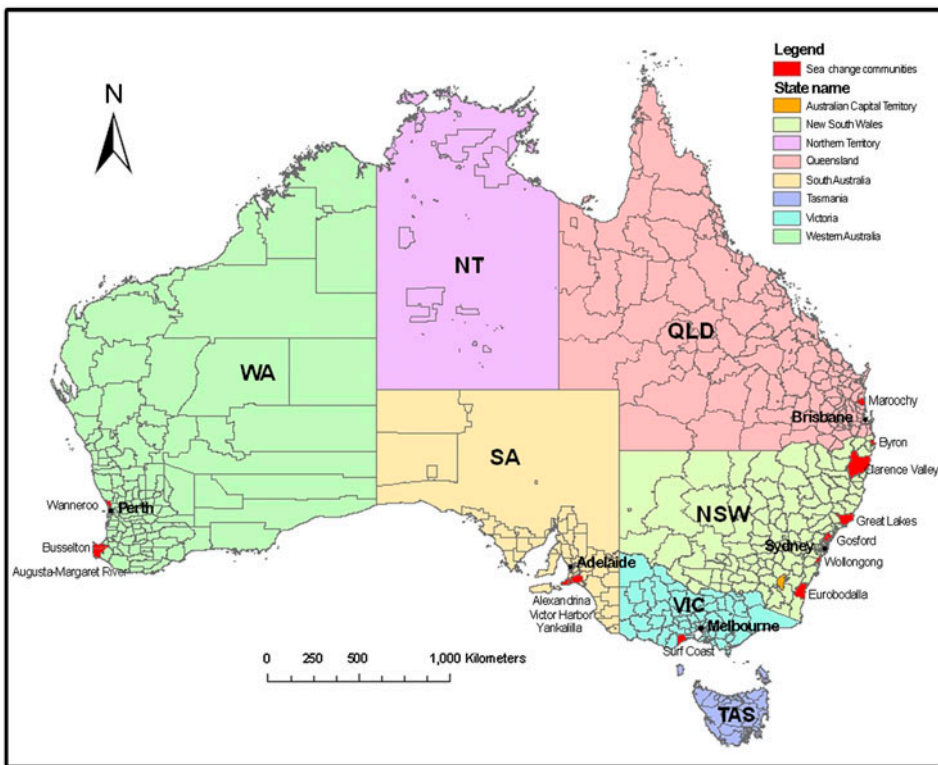


Figure 1. Geographic location of the sea change communities.

Table 1. Sea change communities in Australia.

States	LGAs	Population (in 2006)	Population change (2001–2006) (%)	Area (km ²)	Population density (persons/ km ²)	Driving distance from metropolitan center (km)
NSW	Gosford	158,157	.84	1029	154	74
	Wyong	139,801	5.27	825	170	91
	Great Lakes	32,766	5.51	3375	10	300
	Wollongong	184,212	1.12	714	258	86
	Eurobodalla	35,009	4.60	3422	10	176
	Byron	28,766	.28	567	51	152
VIC	Clarence Valley	48,146	2.91	10,441	5	314
	Surf Coast	21,771	7.59	1552	14	103
QLD	Maroochy	142,838	17.22	1163	123	104
SA	Alexandrina	20,715	15.40	1827	11	83
	Victor Harbor	12,012	9.86	385	312	84
	Yankalilla	4155	9.63	751	6	74
WA	Wanneroo	110,940	36.13	686	162	24
	Augusta-Margaret River	10,353	8.40	2242	5	310
	Busselton	25,354	13.64	1455	17	267

Data source: Australian Bureau of Statistics; driving distance from metropolitan center is measured using Google Earth.

the enhanced scatter plot method developed by Blakely, Bista, and Lubulwa (2006): globally exposed communities – whose population and aggregate income were growing faster than the state (LQ more than 1); established communities – whose population was growing slower than the state (LQ less than 1), but whose aggregate income was growing faster than the state (LQ more than 1); transitional communities – whose population was growing faster than the state (LQ more than 1), but whose aggregate income was growing slower than the state (LQ less than 1); and declining communities – whose population and aggregate income were growing slower than the state (LQ less than 1).

Second, we used the LQ technique to measure the industries of employment to determine to what extent tourism industries are the economic drivers of the 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 frequently used variable in the LQ analysis that 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 more than 1 indicates a higher than average degree of specialization in that sector locally compared with the reference region, and it is interpreted as an indicator of concentration and competitive advantage (Spencer, Vinodrai, Gertler, & Wolfe, 2010). According to the economic base theory, which assumes that a local economy has two sectors – a basic or non-local sector, and a non-basic or local sector – the basic sector industries have a significantly higher concentration of employment relative to the size of the total labor force (LQ more than 1) and, thus, form the economic base of the local economy, or local economic drivers (Klosterman, 1990).

We used the Australian census data based on the Place of Work in 2001 and 2006, and the Australian and New Zealand Standard Industrial Classification 2006 for industry divisions. We analyzed the economic drivers of individual sea change communities and the aggregated economic drivers for all sea change communities. For the economic drivers of individual sea change communities, only industries with employment shares of more than 5% in 2006 were included to ensure that the economic drivers have a considerable employment base in the local economy.² For the aggregated economic drivers, we classified them into four categories according to their LQs in 2006 and LQ changes in 2001–2006: growing economic drivers, growing non-economic drivers, declining economic drivers, and declining non-economic drivers. We plotted the aggregated economic drivers, using their LQs, LQ changes, and employment shares, in order to obtain a holistic understanding of tourism as the economic driver of Australian sea change communities.

Findings

Typology of the sea change communities

The sea change communities are plotted in different categories according to population growth LQ and aggregate income growth LQ (see Figure 2). The plotting chart reveals two important features of the sea change communities: (1) the majority of the selected sea change communities are in the category of Globally Exposed; they had faster population growth and aggregate income growth than their states in 2001–2006; (2) the population growth LQ and the aggregate income growth LQ of the sea change communities are positively correlated. They have a Pearson correlation coefficient of .62 (significant at the .05 level).

Economic drivers of the sea change communities

Ten industry divisions are identified as economic drivers according to the criteria of LQ value of more than 1, and employment share of 5% in 2006 (see Figures 3 and 4).

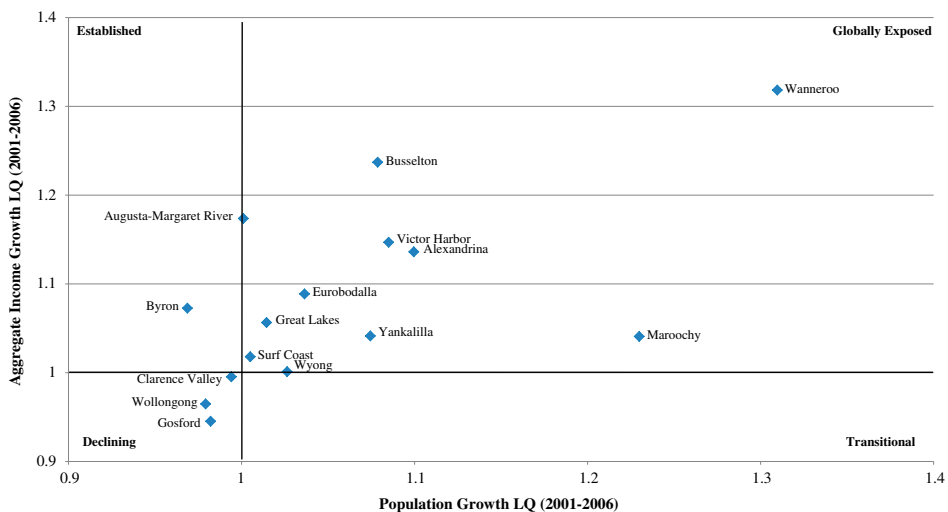


Figure 2. Typology of sea change communities ($n = 15$).

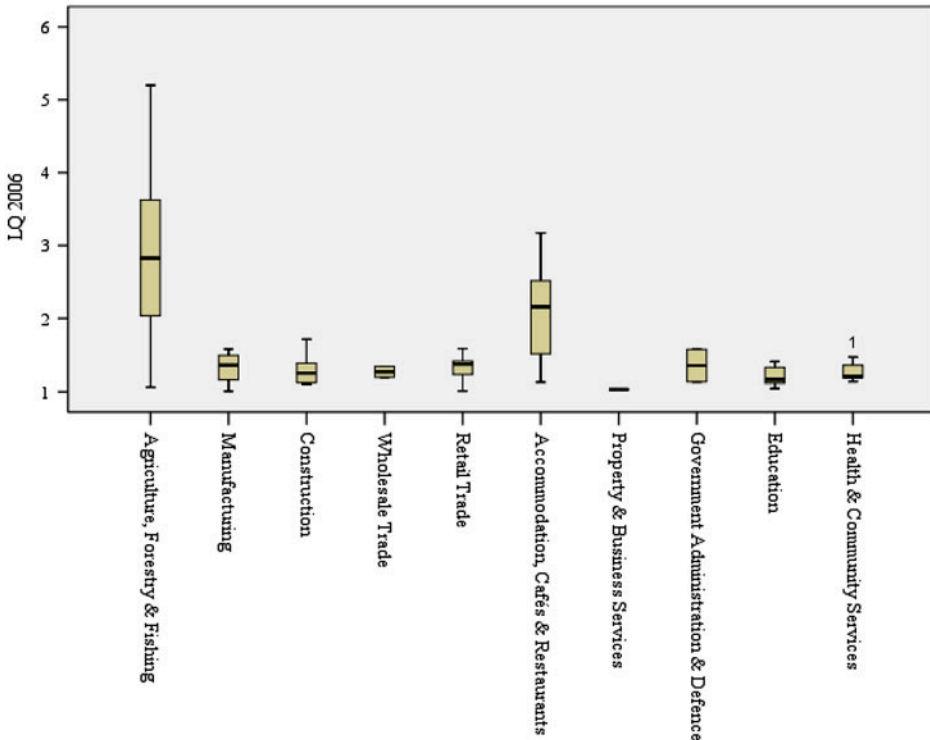


Figure 3. LQ values of economic drivers in 2006 ($n = 15$).

The numbers of sea change communities for each economic driver are indicated in brackets: Retail Trade (13); Accommodation, Cafés, and Restaurants (13); Agriculture, Forestry, and Fishing (8); Health and Community Services (8); Construction (8); Manufacturing (5); Education (5); Wholesale Trade (2); Government Administration and Defense (2); and Property and Business Services (1). Each sea change community has several economic drivers. Each sea change community has either or both of the two tourism industries – Retail Trade (LQ range 1.01–1.58 in 2006); and Accommodation, Cafés, and Restaurants (LQ range 1.13–3.17 in 2006) – as economic drivers.

Integrating the measures of LQ values and employment shares, the local economies of sea change communities are largely reliant on tourism industries. Retail Trade is the largest industry by employment share (range 14.63–22.93% in 2006). Non-tourism economic drivers include primary production and construction, and health and community services. The importance of tourism industries in driving the local economies is associated with the communities' geographic locations. Tourism is more important for more distant and smaller communities, as reflected by the Pearson correlation coefficient of -0.56 (significant at the .05 level) between the LQ value of Accommodation, Cafés, and Restaurants, and the population density.

Aggregated economic drivers of the sea change communities

The aggregated industries of employment in the sea change communities are plotted in Figure 5. They offer a holistic picture of the economic drivers and non-economic

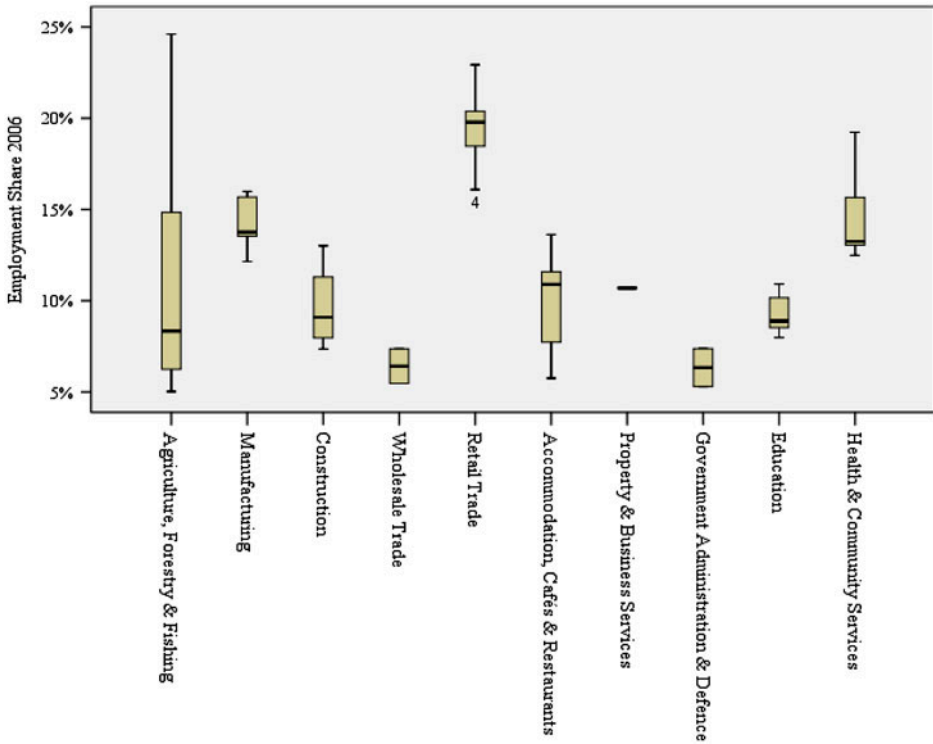


Figure 4. Employment shares of economic drivers in 2006 ($n = 15$).

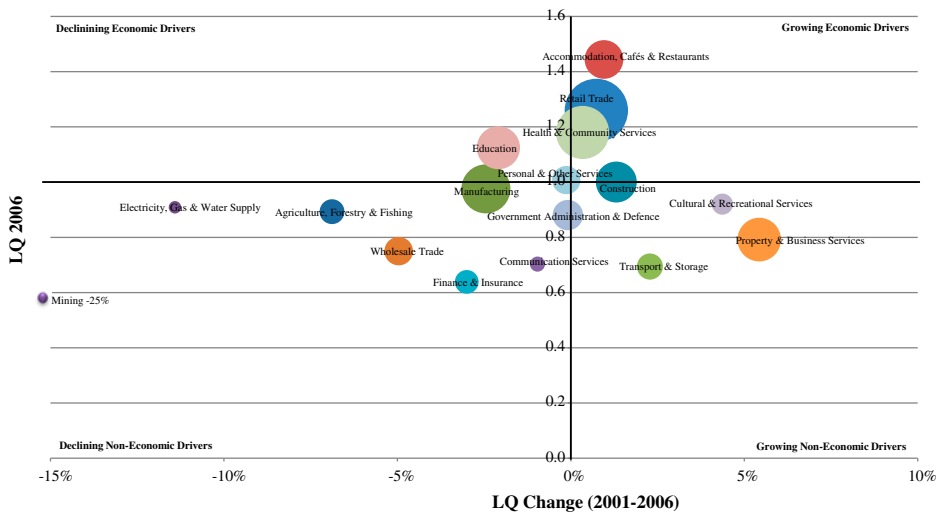


Figure 5. Classification of aggregated industries of employment for the sea change communities ($n = 15$).

drivers. The top economic drivers are Accommodation, Cafés, and Restaurants; and Retail Trade, as measured by LQ in 2006 (respectively, 1.44 and 1.26). Retail Trade is the largest industry division as measured by the employment share, accounting for 19%

of total employment in 2006; Accommodation, Cafés, and Restaurants accounted for 7% of total employment. Both industry divisions enjoyed growth in LQs and employment shares in 2001–2006. Although not classified as an economic driver, the industry division of Cultural and Recreational Services had a significant LQ growth in 2001–2006 (4.5%), reflecting its strong potential to become a new economic driver for the sea change communities.

Concluding discussion: from amenity migration to amenity economy

The dynamic factors of population growth and economic growth can be used to provide a new typology of the sea change communities, and to reflect the relationship between the local population change and the local economic change. Sea change is more than a demographic phenomenon. The demographic change is associated with economic change. The sea change communities' population growth and the economic growth relative to their states (as measured by LQ values) are positively correlated. The amenity migration is interrelated with the amenity economy. On the one hand, the amenity economy is reflected by the growing tourism industries, which are interrelated with the amenity migration. On the other hand, the amenity economy is reflected by other important local industries, such as construction, property and business services, and health and community services, whose growth is driven by the amenity migration too. If "a defining quality of amenity migration is that migrants move for lifestyle, rather than jobs, choosing places with natural amenity, climate, recreation, and affordable housing" (Gurran, 2008, p. 391), a defining quality of amenity economy is the job opportunities deriving from natural amenity, climate, recreation, and affordable housing.

The nature of the amenity economy differs by the sea change communities. O'Connor (2004, p. 7) describes "the coast as the creature of the metropolitan area." 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. Distance from the metropolitan center is a key factor determining the economic base and the roles of tourism industries as local economic drivers. The local economies of the communities, which are closer to metropolitan centers and more populous, are less reliant on a few specialized industries; the roles of the local economic drivers tend to be much weaker. The local economies of more distant and smaller communities are more reliant on a few specialized industries, such as tourism and agriculture.

Distance from the metropolitan center also impacts the types of tourism industries that are the local economic drivers. In the communities closer to the metropolitan center, Retail Trade is often an important local economic driver. Walmsley (2006) observes the retail industry being changed by a lifestyle-linked restructuring, blurring the distinction between shopping and leisure in suburban areas. The blurred distinction between shopping and leisure is more applicable to the sea change communities that are within the commuting distance of the metropolitan center. For the more distant and smaller communities, the industry of Accommodation, Cafés, and Restaurants plays a more important role in driving the local economies.

The traditional tourism industries – Retail Trade; Accommodation, Cafés, and Restaurants – are dominant economic drivers in the sea change communities. The dominance has been on an increase. What is worth noting is the potential of the industry division Cultural and Recreational Services to become a new economic driver. Cultural activities and industries have a significant cumulative impact on the economic

development in rural or non-metropolitan Australia (Andersen & Oakley, 2008; Gibson, Waitt, Walmsley, & Connell, 2010). For example, in the NSW Far North Coast, the regional identification is being transformed by counter-urban migration and tourism, and it is increasingly perceived as an “alternative” or “lifestyle” region, where a distinct cultural economy of niche popular music industry has emerged, with links to cultural production in Sydney, Melbourne, and overseas (Gibson, 2002a, 2002b; Gibson & Connell, 2003).

To sum up, we provide a new typology of Australian sea change communities, using dynamic factors of population change and economic change. The systematic examination of the economic bases of the sea change communities reveals that: (1) overall, tourism industries are the dominant local economic drivers, and the dominance has been strengthening; (2) the sea change communities differ from each other in the local economic drivers, and the determining factors include distance from the metropolitan center, population size, and population density; and (3) there is a new trend of growing importance of cultural and recreational services in driving the local economies.

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Notes

1. Coastal commuters – suburbanized satellite communities in peri metropolitan locations; coastal getaways – small to medium settlements and groupings of settlements within an approximately 3-h drive from 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 in a more than 3-h drive from 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 a 3-h drive from a capital city.
2. One industry’s status as the economic driver of the sea change community’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 key 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% – too low an employment share to justify its status as an economic driver. So, in measuring the economic drivers, only industry divisions with LQ more than 1 and employment share more than 5% in 2006 were included.

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